

oralcare

OUR SELECTED TRENDS,
INSIGHTS & OBSERVATIONS

free the birds®

crowsnest

TRENDS HORIZONS



Drop Scales (Apa ne...)
8 ozs Flour
1/2 Teaspoon Salt
1/2 Teaspoon Soda
1/2 Teaspoon Clean Tartar
1/2 an egg
2 Teaspoons Soda
1/2 pt (Scant)
1/2 pt (Scant)
Sift Dry ingredients

ALDI

Welcome

Recent years have reshaped how we think about health — not as isolated interventions, but as an interconnected system where beauty, biology and longevity converge. Few categories reflect this shift more clearly than oral care.

Once defined by clinical efficacy, oral care is now being culturally reappraised. The mouth is no longer just the site of cavities or whitening, but a gateway to systemic wellbeing - linked to the **microbiome, metabolic health, immune resilience and cognitive longevity**. As preventative health accelerates, oral care is becoming a core pillar of **living well for longer**.

At the same time, the category is absorbing the language and aesthetics of beauty. **The “skinification” of oral care brings serums, peptides and collagen into dental routines**. Enamel is treated like a skin barrier; gums like delicate tissue - transforming care into something more ritualised and sensorial.

Technology is driving this evolution. **AI diagnostics, saliva tracking and microbiome mapping** are enabling personalised, data-led care - shifting oral health from reactive maintenance to predictive optimisation.

Meanwhile, dentistry itself is being reframed. **Spa-like clinics and wellness-led treatments** are turning visits into restorative experiences. And alongside cosmetic perfection, a new aesthetic is emerging - one that embraces individuality and authenticity.

Our latest Crowsnest explores this landscape through our Consumer Archetypes, examining how **longevity, self-expression, technology and ritual** are reshaping what oral care can mean.

The future of dental health is no longer just a brighter smile - but a longer, healthier life, starting with the mouth.

Index

93%

93% of consumers are aware and discuss their dental health indicating a higher awareness and openness than ever before

41%

41% of consumers worry about their oral health and are interested in preventative methods

69%

69% of consumers maintain multi-product oral hygiene kits like toothpaste, floss, mouthwash and tongue cleaners

30%

30% of consumers now buy dental care from online channels showing a shifting consumer landscape

67%

67% of consumers repeat purchase monthly

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Introducing the attitudes

Here at Free The Birds we don't believe your physical age defines you. Whilst demographics will always have their place, we believe that brands and marketers are too quick to rely upon them. We believe in 'emographics'. The way you behave, the way you think, the way you view the world, says more about you than the number of candles on your birthday cake.

Age-related pigeon-holes are dangerous things to fall into if you're a marketer. There could be consumers who you aren't reaching simply because they were under or over an age limit - even though they potentially relate to your brand.

As a result, our trends insights are related to consumer attitudes not age. We believe that this perspective will prove to be more reflective of human nature and much more inspiring. It certainly is when we are briefing our creative teams. We find that designing and writing for an attitude produces a much stronger connection with the intended consumer.

So, we hope you enjoy seeing all the exciting and thought-provoking new ideas in Oralcare, seen in the context of a variety of consumer attitudes. We feel sure that some of those attitudes will be very familiar to you. And very valuable.



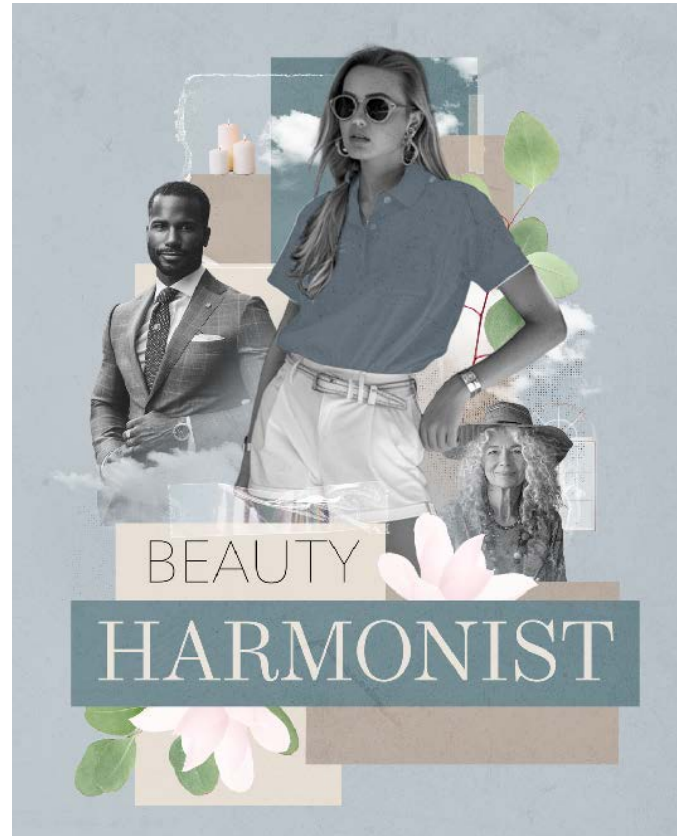
We have created seven consumer attitudes.

All equally relevant and tribes you could be targeting.

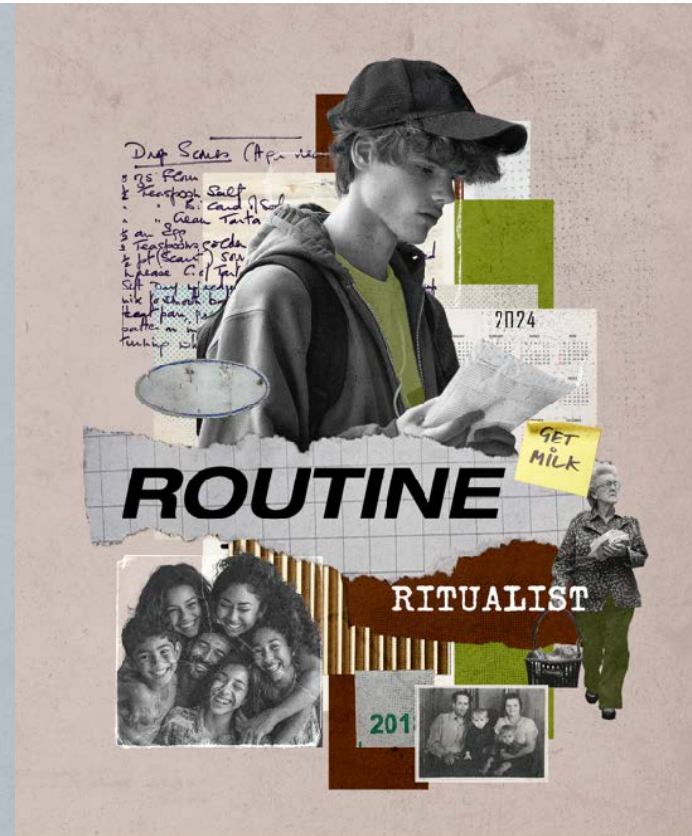
You will find that you - and your consumers - identify strongly with a single attitude, but see elements of themselves in several of them, embodying traits across the archetypes.

Attitudes within Oral Care

High-Growth Value Pools



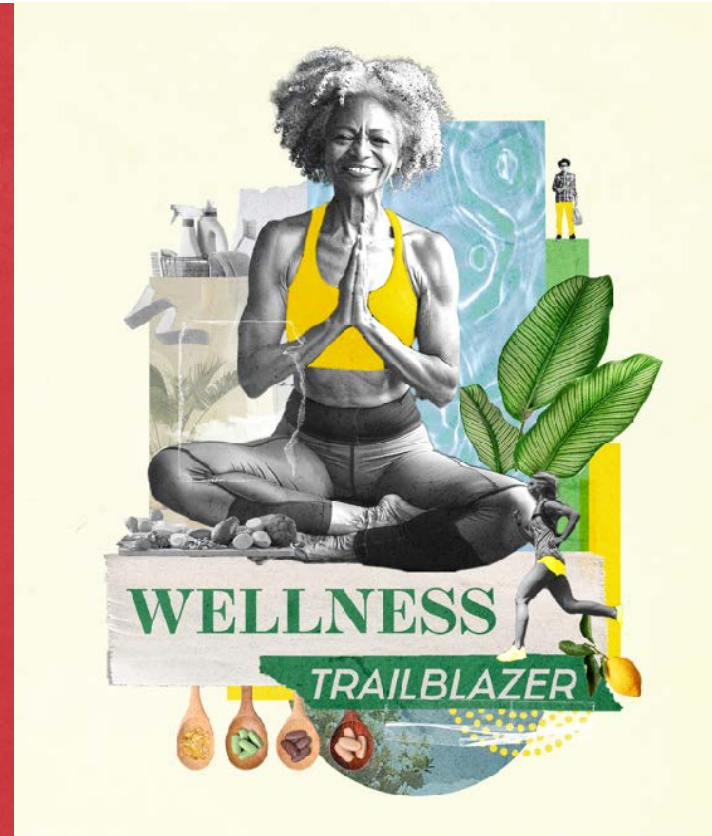
Stable Value Pool



Fast-Moving Value Pools



Emerging High-Growth Value Pools



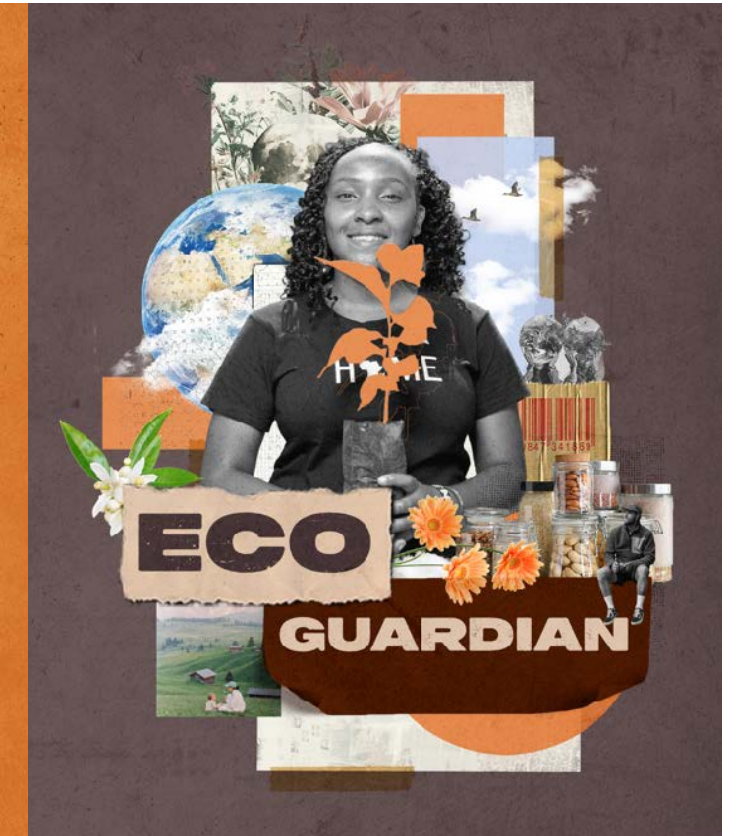
High-Growth Value Pools



Stable Value Pools



High-Growth Value Pools



Beauty-led. *Ingredient conscious. Aesthetic-driven premium consumer.*

Habit-driven. *Trust-led. Loyal to proven brands and consistent routines.*

Social-first. *Experiment-driven. Rapid adopters of the newest oral care trends.*

Science-led. *Ingredient aware. Focused on preventative health and long-term wellbeing.*

Innovation-led. *Data-driven. Eager to adopt technology that enhances health and performance.*

Value-driven. *Pragmatic. Focused on maintaining essential routines while managing spending carefully.*

Sustainability-led. *Ethically conscious. Committed to reducing environmental impact through everyday choices.*

Premium oral care growing **~6–8%** annually, outpacing the core category

Whitening products growing **6–8%** CAGR globally

Beauty-adjacent formats (**serums, pens, powders**) expanding fastest online

This archetype reflects the premiumisation of oral care, where dental hygiene moves beyond functional care into a beauty ritual aligned with skincare and cosmetics.

Toothpaste remains the largest category, accounting for roughly **45%** of global oral care value.

Global toothpaste sales exceed **\$20–22 billion** annually.

Gum-care and sensitivity toothpastes are growing faster than the overall toothpaste segment (around **5–7%** CAGR)

For this consumer, oral care is a non-negotiable daily ritual, typically centred around brushing twice a day with products they trust.

Oral care content on TikTok has accumulated **billions of views**, with hashtags such as **#teethwhitening** and **#oralcare** becoming major discovery channels.

Whitening products are among the fastest growing segments, expanding at **~6–8%** CAGR globally.

New formats and **limited launches** frequently sell out quickly when amplified through social media.

The global **probiotics** market is forecast to exceed **\$85 billion by 2027**, helping fuel interest in **microbiome-supporting oral products**.

Natural and wellness-led oral care is growing **8–12%** annually in key Western markets, outperforming traditional toothpaste segments.

Searches and discussions around the **oral microbiome** have increased significantly as consumers become more aware of the connection between oral health and overall wellbeing.

The **global electric toothbrush** market is expected to surpass **\$7–8 billion** by the end of the decade, growing faster than manual toothbrushes.

Connected devices and smart brushes are expanding rapidly as consumers adopt data-driven health tracking across fitness, sleep and personal care.

Premium oral care devices are seeing strong growth in North America, Europe and Asia as consumers invest more in **preventative health technology**.

Economic pressures across many markets have reinforced **value-seeking behaviour**:

Private label oral care products now account for over **20% of category sales** in parts of Europe.

Value packs and **family-size formats** are increasingly popular as consumers seek to stretch household budgets further.

Despite **tighter spending**, the Savvy Saver still prioritises products that **deliver essential performance and trusted protection**.

Over **60% of global consumers** say **sustainability influences their purchasing decisions**.

Demand for **natural and environmentally conscious** personal care products is growing around **8–10%** annually in many Western markets.

Plastic waste and **Waterless solutions** from traditional toothpastes, tubes and disposable brushes has driven interest in alternative formats and refill systems.

Segmentation within Oral Care

The category is no longer defined by function alone, but by the multiple roles it now plays in consumers' lives - from daily maintenance and self-expression to long-term health optimisation.

As attitudes toward wellbeing, beauty and longevity continue to converge, oral care is fragmenting into distinct but interconnected spaces, each offering new avenues for growth.

For brands, this evolving landscape presents both complexity and opportunity. Success will depend on identifying where to play, how to differentiate, and which consumer needs to prioritise - whether through elevated everyday rituals, clinical performance, or culturally relevant innovation.

Mapping these segments is therefore not just a view of the market today, but a framework for where future value will be created and where brands can meaningfully compete.

Core Cleansing & Mechanical Removal	Whitening & Aesthetic Enhancement	Gum & Soft Tissue Health	Oral Microbiome & Pre/Pro/Postbiotic Care	Oral Longevity & Cellular Health
<ul style="list-style-type: none"> Toothpaste (<i>whitening, sensitivity, enamel repair, gum care, microbiome-safe</i>) Tooth powders Tooth tablets / concentrates Stain-removal pastes Polishing pastes (<i>at-home</i>) Professional-style polishing kits Electric toothbrushes (<i>sonic, oscillating, AI-enabled</i>) Manual design-led brushes Replaceable brush heads (<i>sustainable systems</i>) Tongue scrapers (<i>metal, sculptural, antimicrobial</i>) Water flossers / oral irrigators Interdental brushes Dental floss (<i>biodegradable, silk, infused</i>) Floss picks (<i>design-led, refillable systems</i>) 	<p>The "oral beauty" space</p> <ul style="list-style-type: none"> LED whitening systems Whitening pens Peroxide / non- Peroxide whitening kits Enzyme-based whitening Hydroxyapatite remineralising whitening Colour-correcting tooth glosses Tooth serums Veneer maintenance systems Smile-enhancing cosmetic products Breath-brightening mists Lip-tooth integrated beauty (<i>tooth luminising balms</i>) 	<p>Often under-leveraged premium territory</p> <ul style="list-style-type: none"> Gum repair serums Anti-inflammatory oral gels Barrier-repair gum treatments Post-procedure healing kits Periodontal support systems Collagen-supporting oral care Peptide-based gum formulations Regenerative dentistry adjuncts 	<p>Major future-forward space</p> <ul style="list-style-type: none"> Microbiome-balancing toothpaste Oral probiotics (<i>lozenges, chewables</i>) Prebiotic mouthwashes Postbiotic formulations Biofilm-targeting actives pH-balancing systems Saliva-support products Nitric oxide-supporting oral care Microbiome testing kits (<i>at-home diagnostics</i>) 	<p>High-end science territory</p> <ul style="list-style-type: none"> NAD+ -support positioning Antioxidant-rich oral formulations Anti-glycation oral care Inflammation-modulating systems Mitochondrial-support narratives Stem-cell / exosome-adjacent regenerative positioning Oral-systemic health bridging products

Ingestible Oral Beauty	Sensory & Ritual Innovation	Professional-Grade At-Home Technology	Sustainability & Refill Systems	Diagnostics & Preventative Monitoring	Specialised & Medical Adjacent	Cultural & Lifestyle Crossovers
<p>Bridging supplement and dental</p> <ul style="list-style-type: none"> Enamel-support supplements Collagen + gum health capsules Breath-support supplements Oral microbiome nutraceuticals Calcium/phosphate bioavailability blends Skin-hair-teeth synergy packs 	<p>Where bougie basics thrive</p> <ul style="list-style-type: none"> Elevated flavour houses (yuzu, bergamot, matcha) Texture innovation (foam concentrates, gel-serum hybrids) Aromatherapy-infused brushing Night-time oral ritual systems Luxury mouth rinsing elixirs Refillable apothecary decanters 	<p>Clinic democratisation</p> <ul style="list-style-type: none"> AI brushing feedback systems App-connected oral health tracking Plaque-detecting smart devices UV sanitisation stations 3D-printed personalised trays Custom-formulated toothpaste subscriptions At-home remineralisation kits 	<p>Engineering-led premium</p> <ul style="list-style-type: none"> Aluminium tubes Glass mouthwash bottles Refill pods Concentrated toothpaste pastes Compostable floss systems Zero-water formulations Circular toothbrush programs 	<p>Untapped luxury opportunity</p> <ul style="list-style-type: none"> Saliva biomarker testing Hormone-linked oral indicators Inflammation testing kits Microbiome mapping subscriptions Oral cancer screening adjunct tools Dental health data dashboards 	<p>Condition-led premium niches</p> <ul style="list-style-type: none"> Dry mouth (xerostomia) systems Orthodontic care kits Pregnancy-safe oral care Menopause-linked oral health Post-whitening recovery Travel oral ritual kits 	<p>Where identity meets oral care</p> <ul style="list-style-type: none"> Fragrance-house collaborations Luxury hotel amenity lines Designer toothbrushes Dental spa brands Subscription ritual boxes Limited-edition flavour drops

The Beauty Harmonist

The Beauty Harmonist is one who seeks beauty within and out, seeking the highest quality in their purchases; highly efficacious ingredients housed within chic, elevated packaging.

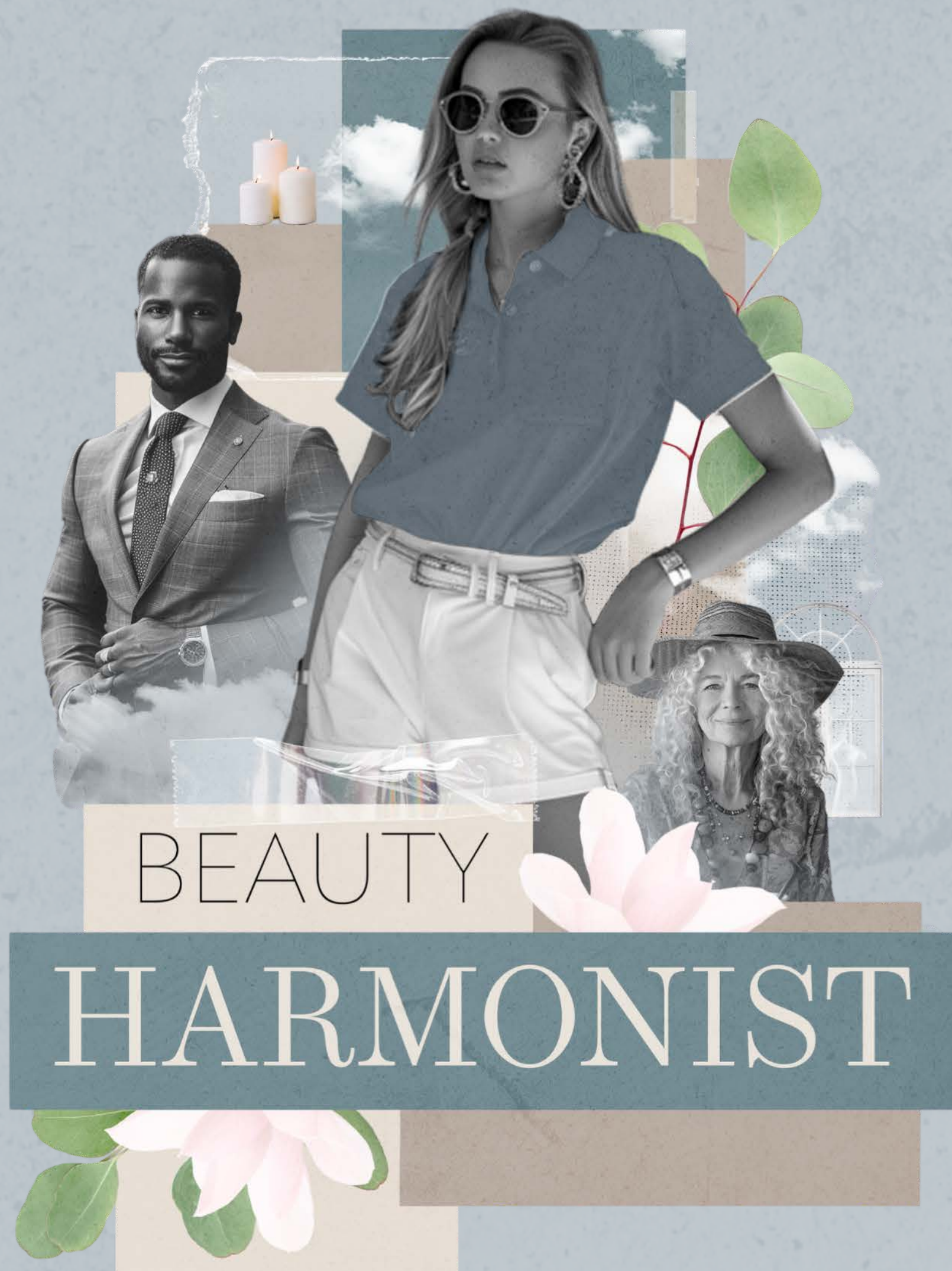
The pursuit of these high end products speaks to their spending power, as the consumer group that is least affected by the cost of living crisis. However, this attitude also counts customers amongst its ranks who form dedicated bonds with specific brands - brands that are known for their quality and status. Their brand loyalty sees the Beauty Harmonist make committed investments in their wellness regime.

They believe outer beauty comes from within. They champion ingredients and formulations which can protect and nurture their health and wellbeing, with the end result also being a younger, healthier appearance. Supplements which are proven to support the health of their skin and hair, whilst working as a complementary addition to their topical treatments, will greatly appeal to them.

Their ability to spend more on their wellness regime means they are often the first to invest in new and advanced ingredients which routinely hit the market through luxury brands and treatments in high-end clinics. Ingredients such as NAD (nicotinamide adenine dinucleotide, a molecule that supports energy, cell repair, and longevity) and exosomes are prime examples.

This is also combined with sustainability and science. The Beauty Harmonist will do their research to ensure their investment is of the greatest quality - every ingredient and component selected with purpose by the brands they trust to deliver beautifully for them.

Aesthetic-driven • Beauty-focused • Harmonious • Intentional • Stylish • Design-conscious • Environment-enhancing • Mindful • Detail-oriented • Curated



Welcome to the Bougie Basics



For the Beauty Harmonist, nothing in their routine is accidental - not their serum, not their supplement, and no longer their toothpaste. What was once a functional, fluorescent supermarket staple has been elevated into a design-led, ingredient-conscious, luxury-coded ritual.

Oral care is undergoing its “bougie basics” transformation.

This consumer does not see toothpaste as a commodity. They see it as part of a wider beauty ecosystem. The mouth is no longer separate from skincare or longevity; it is an extension of both. As the ‘skinification’ of wellness continues, oral care is being reframed through the same lens as a face serum: high-performance actives, clinical credibility and sensorial sophistication.

Brands such as **Aesop, Lebon** and **vVARDIS** have led the charge, replacing clinical blue gels with aluminium tubes, chic apothecary aesthetics and elevated flavour profiles - think bergamot, jasmine mint and herbal botanicals rather than generic “extra fresh.”

Packaging is countertop-worthy, designed to sit seamlessly alongside prestige skincare.

The bathroom has become a curated space, and oral care must now earn its place within it.

But this shift is not aesthetic alone.

The Beauty Harmonist expects efficacy.

Dentist-founded brands such as Spotlight Oral Care bring professional authority into the home.

Crucially, this consumer is less price-sensitive. They are willing to invest in premium everyday products if those products deliver visible results and align with their values.

Oral care becomes a small but symbolic expression of status: a signal of discernment, research and commitment to holistic beauty. It is also a gateway category - a relatively accessible entry point into the world of elevated wellness.

The bougie basics movement reflects a broader cultural shift: the elevation of the everyday.

In a world where beauty is increasingly tied to longevity, cellular health and inner vitality, even brushing one’s teeth becomes part of a considered ritual.

For the Beauty Harmonist, there are no basics anymore - only opportunities to refine, upgrade and harmonise every step of their routine.

\$33.3bn

“It is projected to reach \$33.3 billion by 2034, growing at roughly 5.9% annually.”

Fortune Business, 2026

7.3%+

“The luxury toothpaste segment is projected to grow at about 7.3% CAGR through 2030, faster than the broader category.”

Accio, 2026

\$1.8bn

“The segment is expected to reach around \$1.8 billion globally by 2030.”

Accio, 2026

\$700m

“Industry analysts estimate that “oral beauty” could represent a \$700 million premium opportunity in India alone.”

Economic Times, 2025

Elevated Everyday

Tapping into the growing trend for fine fragrance personal care, dental brands are creating sophisticated formulas that add excitement and pleasure to oral care routines.



LARO

A premium London-based oral care brand reframing brushing as a beauty and wellness ritual. Founded by Beth Bisley, it blends pharmaceutical-grade science with botanical ingredients and refined design.

Formulations combine wild mint, lemon, and bergamot oils for a fresh, aromatherapeutic flavour - far from traditional mint. With elegant packaging and sensorial appeal, LARO reflects the premiumisation of oral care and the shift toward more elevated daily routines.

WILD MINT, LEMON & BERGAMOT TOOTHPASTE + MOUTHWASHES



SELAHATIN

A Swedish luxury oral care brand turning brushing into a design-led, sensorial experience. Founded by Kristoffer Vural, it pairs dentist-developed formulas with bold aesthetics and flavour profiles inspired by fragrance and gastronomy.

Known for colourful packaging and artistic collaborations, SELAHATIN elevates toothpaste into a statement—reflecting the rise of “bathroom shelf luxury,” where oral care meets lifestyle and wellness.

AMORIST – GREEN MINT, PEPPERMINT & MENTHOL
ESCAPIST – ORANGE, CINNAMON & PEPPERMINT
OF COURSE I STILL LUV YOU – EUCALYPTUS, HONEY & MENTHOL

BLUE FOREVER – SEA SALT & PEPPERMINT
HYPNOTIST – VIOLET, PEPPERMINT & MENTHOL

THE CONVERGENCE OF:

PRESTIGE BEAUTY GROWTH

ELEVATED TASTE PROFILES

LONGEVITY OBSESSION

SUSTAINABILITY EXPECTATIONS

AESTHETIC HOME CULTURE

SMILE-CENTRIC BEAUTY STANDARDS



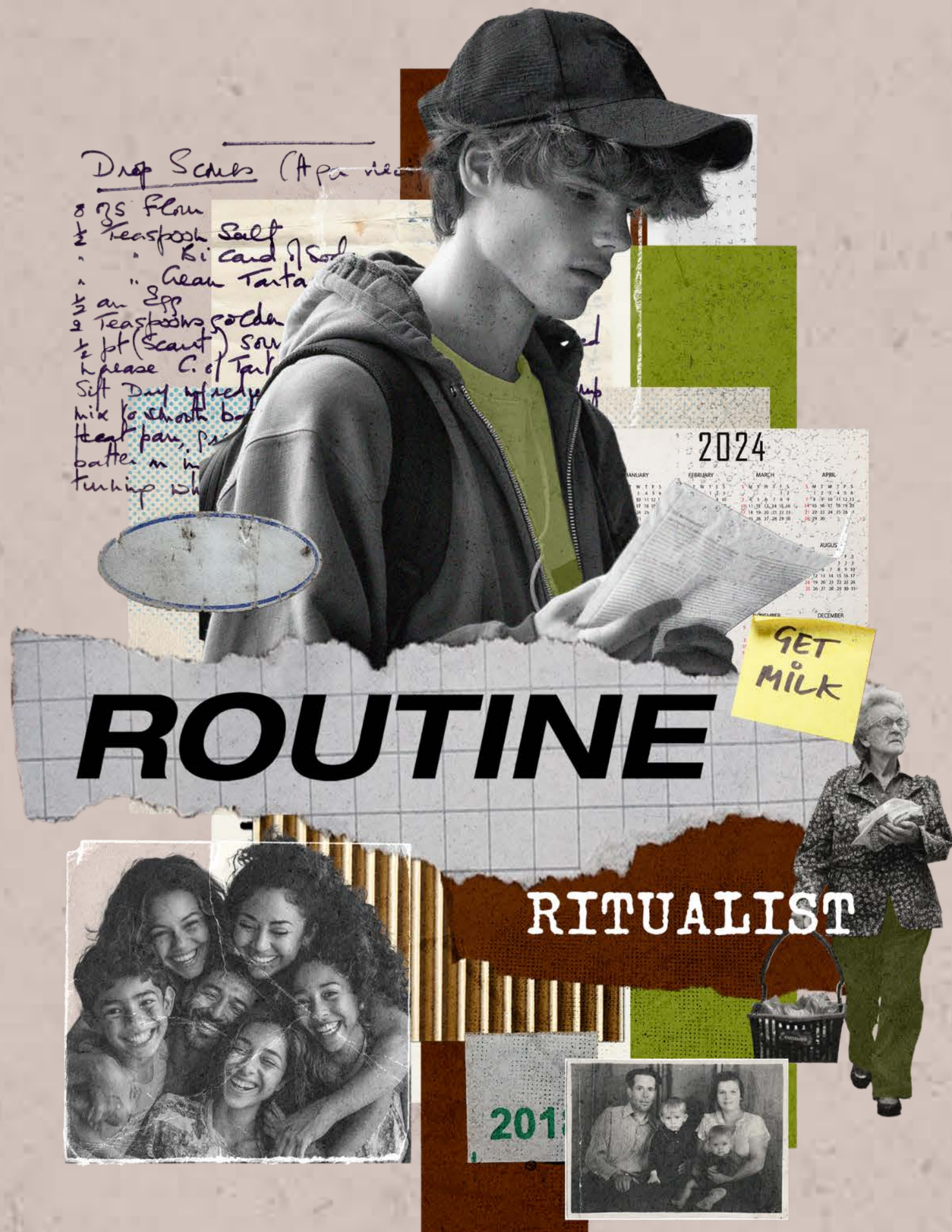
AESOP

Approaches oral care through its signature apothecary lens. Its toothpaste and mouthwash prioritise botanical ingredients and refined flavour profiles, offering a sophisticated alternative to conventional mint formulas.

The Dental Gel combines anise, spearmint, and clove for a warm, herbal taste—closer to a botanical remedy than traditional toothpaste. With minimalist packaging and elevated formulations, Aesop positions oral care as part of a wider ritual rooted in design, sensorial experience, and ingredient integrity.

ANISE, SPEARMINT & CLOVE

The Routine Ritualist



The Routine Ritualist is perhaps the most difficult attitude to steal share from. Like the Beauty Harmonist, the Routine Ritualist is committed to quality. However their choice of purchase is driven by experience - often over a period of years - where their hero products consistently deliver for them and their routine.

Quality here also speaks to simplicity. Thriving in ease and regularity of their routine, multi-purpose, highly functional products are championed. A Routine Ritualist will not add a new product to their routine unless they are confident that it works exactly as it says on the tin - or if it is highly personalised to them and their needs.

For a Routine Ritualist, the opportunity to welcome a product specifically tailored to them is irresistible. It saves them time, becomes a seamless addition to their regime, and is met with open arms - and wallets. They are willing to make an investment in a brand which promises them tangible results. For those who aren't able to spend as much on a personalised subscription-based product, efficacious multi-purpose vitamins which offer multiple health benefits in an efficient manner are also appealing.

The Routine Ritualist is typically committed to purchasing brands their parents use, often heritage, household-name brands. These leading brands can retain their loyal customers through innovation in product development, safe in the knowledge that additions to ranges or new formulations in hero products will perform as well as predecessors.

You will find Routine Ritualists of all ages, from those who have been dedicated consumers for years, to younger audiences inheriting habits. They struggle to move on from their committed habits, even when reaching significant life stages which can put different demands on their body - they will remain loyal to the brands and products that have served them for years.

Habitual • Consistent • Loyal • Traditional • Predictable • Routine-oriented • Disciplined • Familiar • Reliable • Heritage-focused

The Power of Habit Economics



\$127bn

The wider dental care products market could reach \$127.9 billion by 2035, growing at roughly 7% CAGR, driven by prevention and treatment of gum disease and sensitivity.”

Future Marketing Insights, 2025

60%

“The global oral health market is highly consolidated, with the top five players controlling more than 60% of the market.”

The Times, 2025

41%

“Colgate-Palmolive alone holds around 41% of the global toothpaste market, making it the category leader.”

Barrons, 2025

28-44%

“Toothpaste remains the largest segment of oral care, accounting for around 28-44% of category share depending on region.”

Future Marketing Insights, 2026

In oral care, few consumer mindsets are as entrenched or as commercially powerful as the Routine Ritualist. This is the consumer who doesn't browse the aisle for novelty. They repurchase. Repeatedly. Their bathroom shelf is a system built over years, sometimes decades, and often inherited from family habit.

For this audience, quality is synonymous with consistency.

A toothpaste that has delivered cavity protection, gum stability or sensitivity relief for years is not easily displaced by aesthetic disruption or influencer hype.

Brands such as **Colgate-Palmolive, Procter & Gamble (Oral-B, Crest), and Haleon (Sensodyne, Parodontax)** understand this deeply. Their authority is built not on coolness, but on clinical validation, dentist endorsement and intergenerational familiarity.

Habit economics strongly favour these players.

Toothpaste is one of the most routine-bound categories in FMCG, with brand loyalty rates consistently high.

Dentist recommendation remains one of the most influential purchase drivers in therapeutic segments such as sensitivity and gum care - categories that continue to outperform basic cavity care in value growth across Europe.

Importantly, when Routine Ritualists “upgrade,” they tend to trade up within their trusted brand ecosystem rather than switch to a new name entirely.

Innovation in this space therefore looks evolutionary, not revolutionary.

It is science-led, often incremental, and carefully framed. Stabilised stannous fluoride systems, enamel-repair technologies and targeted gum-health formulations offer tangible improvement without destabilising the ritual.

Where opportunity expands is in personalisation.

The Routine Ritualist is reluctant to experiment - unless the innovation is demonstrably tailored to them.

Crucially, this archetype spans generations. Younger consumers may adopt trend-driven brands in other categories, yet when confronted with bleeding gums, enamel erosion or increasing sensitivity, they often revert to the brands their parents trusted.

For heritage oral care players, the mandate is clear: protect the ritual.

Build systems, not stunts.

Because for the Routine Ritualist, reassurance will always outperform reinvention.

Trust me

Because oral health problems are widespread and prevention is routine-based, consumers rely heavily on trusted brands recommended by dentists or family habits.



GUM DETOXIFY TECHNOLOGY (Crest / P&G)

Gum Detoxify is a therapeutic toothpaste range from Procter & Gamble under the Crest brand, designed to target gum health rather than just cavity protection. Using stabilised stannous fluoride technology, the formula penetrates around the gumline to neutralise plaque bacteria and help prevent gingivitis. The range reflects the growing shift toward condition-led oral care focused on gum health as a foundation for overall oral wellbeing.

GUM DETOXIFY DEEP CLEAN TOOTHPASTE / GENTLE WHITENING TOOTHPASTE / TWO-STEP GUM DETOXIFY SYSTEM



MICROBIOME + GENTLE SCIENCE (Zendium / Unilever)

Zendium is a microbiome-focused oral care brand from Unilever that supports the mouth's natural defences rather than aggressively killing bacteria. Its enzyme and protein-based formulas are designed to strengthen the oral microbiome, reflecting the growing shift toward gentler, biology-led oral care.

ZENDIUM ORIGINAL TOOTHPASTE / SENSITIVE TOOTHPASTE / KIDS TOOTHPASTE

The oral care market is both highly habitual and highly consolidated, with the **top five global players controlling more than 60% of the category** and **toothpaste** remaining the **largest segment** of daily oral health routines.

Key growth areas include:

- Sensitivity care (led by brands like Haleon's Sensodyne)
- Gum health / gingivitis treatment
- Enamel repair and acid protection
- Clinical whitening



Flavour Toothpaste (Marvis / Ludovico Martelli)

Marvis is an Italian toothpaste brand from Ludovico Martelli known for turning toothpaste into a flavour-led experience. Blending traditional mint with unexpected ingredients, the brand created a category of premium, lifestyle toothpaste where taste, design and ritual matter as much as hygiene. Its distinctive aluminium tubes and bold flavour combinations helped popularise the idea that toothpaste could be expressive and indulgent, particularly appealing to younger consumers seeking novelty beyond classic mint.

JASMIN MINT / CINNAMON MINT / GINGER MINT / AMARELLI LIQUORICE MINT / AQUATIC MINT / CLASSIC STRONG MINT



The Track & Trend

This consumer is highly influenced by friendship groups, social media and the news agenda. They rely less on intense research, more on superficial perceived benefits. Of all consumers, they are the least committed to brands, regularly trying new products they encounter, at the risk of experiencing FOMO.

The Track & Trend's adaptability was fuelled by the global pandemic, which reshaped their spending habits - from where they shopped to the products they chose - often influenced by news and social media. Healthcare is a leading example, as it accelerated the rise of proactive, preventative wellness and greater investment in personal wellbeing.

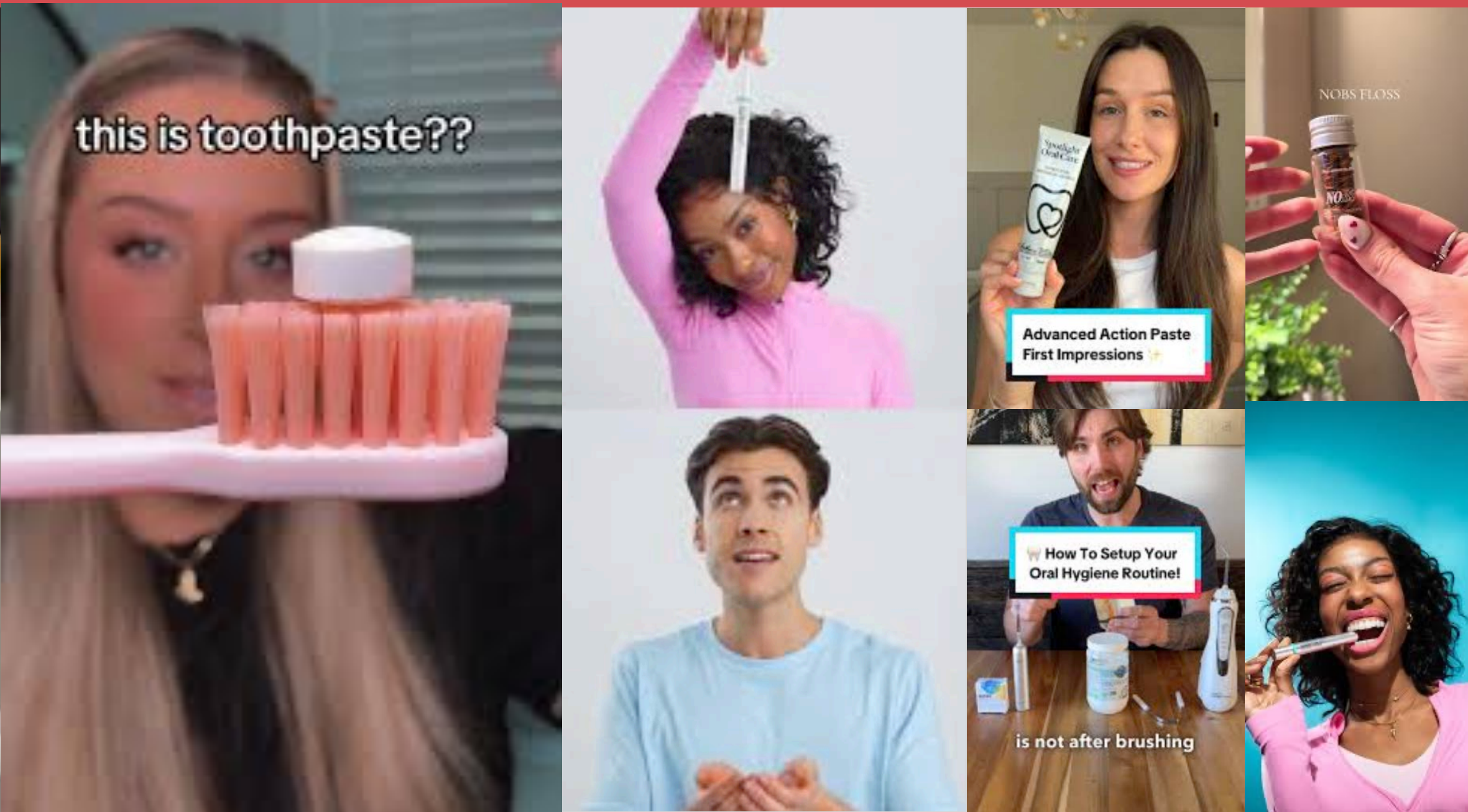
There are two key aspects to the Track & Trend consumer in healthcare - those who are quick to explore the hottest, trending products of the moment, and those who use their preferred platforms to learn more about prospective products before trialling them, and/or documenting their experience. Products and markets like the fast-growing sleep supplement space, and those in the GLP-1 phenomenon, are appealing to both of these types of Track & Trend consumers.

They are also the consumers who are most influenced by strong marketing efforts from brands which are adept at capturing the zeitgeist. If a company can nail beautiful branding, deliver entertaining and informative social content, and form well-executed partnerships with trending content creators, they will capture the spending power of the Track & Trend - and health and wellness products are no exception. In fact, they are a major area of potential.

Their commitment to micro-trends results in more frequent (yet less predictable) purchases compared to other consumer groups, experimenting with various ingredients, products and treatments. The Track & Trend's desire to display their habits to the world also ensures that brands can source first person and often in-depth reviews and feedback in real time.

Trend-following • Fashionable • Conformist • Influenced • Up-to-date • Mainstream • Popular
• Socially-aware • Brand-conscious • Contemporary

When Oral Care becomes Cultural Currency



Unlike traditional oral care shoppers, who prioritise consistency and familiarity, **Track & Trend** consumers are **motivated by change**. **Playful formats** provide a low-risk way to experiment within a high-frequency category, allowing consumers to refresh their routine without abandoning it entirely.

In this sense, novelty does not disrupt habit, it layers onto it.

This behaviour is reinforced by the mechanics of digital platforms. Visually distinctive products are more likely to surface in feeds, while unexpected formats encourage interaction, documentation and peer-to-peer recommendation.

Oral care, typically a low-interest category for the track & trend consumer, is therefore being re-engineered for visibility — designed not just to perform, but to circulate.

Brushing teeth, once invisible, now sits within a broader **“get ready with me”** ecosystem, where products contribute to self-expression, aesthetic, and lifestyle.

At the same time, **playfulness creates accessibility**. In a category long defined by clinical language and rigid routines, more expressive formats soften the experience — **making oral care feel less prescriptive and more inviting**.

For brands, this signals a shift from product to participation. Playful formats become cultural entry points, driving discovery and expanding reach beyond traditional audiences. They encourage more frequent engagement, increasing both **trial and share of mind** in a space historically shaped by routine.

Crucially, this isn't about trading efficacy for entertainment. The strongest innovations pair **credible performance** with formats that **feel fresh and intuitive** — reframing oral care as something **consumers can trust and enjoy, a powerful combination in a category built on repetition**.

There is also a broader cultural shift at play. As everyday routines become content, consumers are increasingly curating even the most functional moments of their day.

Fast-Growing Oral Care Micro-Categories

\$118.5m

“The toothpaste tablets market - a format inherently suited to subscription and digital-first brands - is experiencing notable expansion.”

GrandView Research

TikTok's Role in Discovery and Buying

83%

“83 % of TikTok Shop shoppers say they discovered a new product on the platform, and 70 % discovered a new brand there — with Beauty & Personal Care among the top performing verticals.”

BeautyMatter, 2025

TikTok's Community

870m

“58% of TikTok users shop directly on the platform, translating to roughly 870 million users globally engaging with the shop feature.”

BeautyMatter, 2025

TikTok's Role in Discovery and Buying

55%

55% of users say they make purchases after seeing products on TikTok, underlining the platform's direct response power.

BeautyMatter, 2025

Say ‘Cheese!’

For the Track & Trend consumer, oral care becomes a fast-moving playground of discovery — where new drops, bold flavours and viral formats transform a daily routine into a shareable moment of cultural fun.



NOBS

NOBS modernises oral care with toothpaste tablets designed to eliminate plastic tubes while delivering clean, effective formulations. The brand combines sustainability with convenience, offering a travel-friendly and subscription-ready format that appeals to eco-conscious consumers. Its rapid rise on TikTok — driven by visually satisfying tablet-to-foam content and zero-waste messaging — has helped propel NOBS from a DTC disruptor to mainstream retail, including expansion into Target Corporation stores.

FLUORIDE TOOTHPASTE TABLETS / NANO-HYDROXYAPATITE TOOTHPASTE TABLETS /
REFILL TABLET POUCHES & GLASS JARS /



BOKA - GRILLED PICKLE FLAVOUR

Boka demonstrated the power of playful provocation with its limited-edition Grilled Pickle toothpaste — a deliberately unexpected launch that sparked major conversation on TikTok. The variant sold out within two months and reportedly drove a 200% uplift in new-to-brand customers, turning toothpaste into a cultural talking point. By leaning into bold flavour experimentation, Boka showed how novelty launches can operate as a discovery engine and customer acquisition strategy.

GRILLED PICKLE TOOTHPASTE (LIMITED EDITION) / ELA MINT TOOTHPASTE (CARDAMOM &
MINT) / COCO GINGER TOOTHPASTE / NANO-HYDROXYAPATITE WHITENING TOOTHPASTE



LUSH TOOTHPASTE JELLIES

Lush reimagines oral care with its playful Toothpaste Jellies — wobbling, scoopable formats that transform brushing into a sensory experience. The unusual texture, combined with bold flavour profiles such as citrus sparkle blends, spicy clove and candy-like sweetness, moves toothpaste away from clinical mint into something more experiential. Their visual novelty makes them highly shareable on social platforms, while Lush’s ethical sourcing and minimal packaging reinforce appeal among younger consumers seeking expressive and conscious beauty products.

FLAVOURS FEATURING CITRUS, CLOVE AND CANDY-INSPIRED PROFILES



The Wellness Trailblazer

The **Wellness Trailblazer** seeks holistic, sustainable and overall science-based products which give them confidence that they are safe for them and their loved ones. The products they choose for their routine play a significant role in both their physical and mental wellbeing.

Because of their passion for protecting their future health and wellness, they are a highly discerning attitude when it comes to the ingredients and formulations they're putting in their body. Clean-washing is their biggest turn off; products they choose must do exactly what they claim to be able to do. Wellness Trailblazers lead the pack when it comes to in-depth research on ingredients which have the potential to cause them or their loved ones harm.

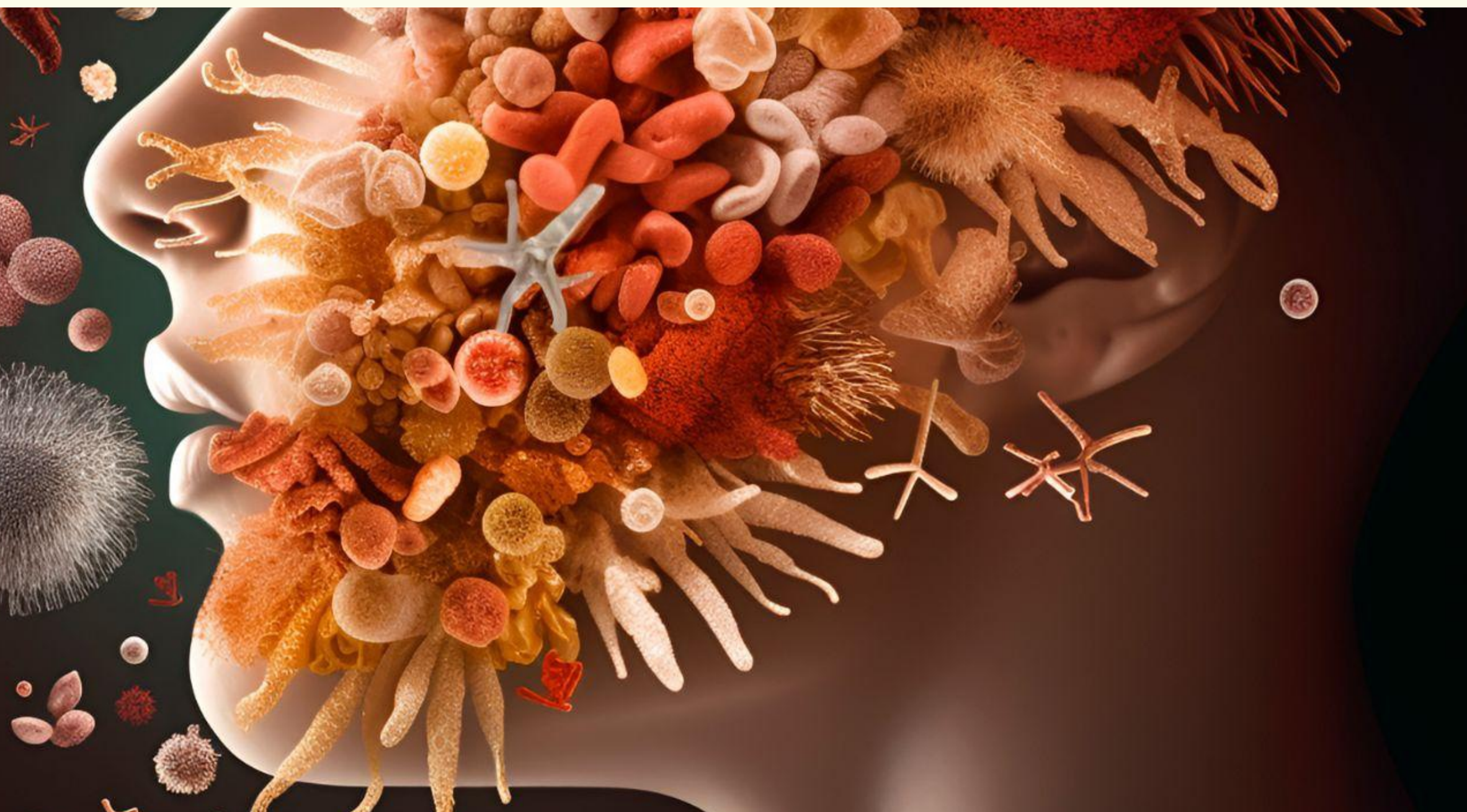
This consumer is responsible for the success of efficacious brands in some of the most powerful - and crowded - categories. Sleep and cognitive health, joint health, gut health (to name just a few). The Wellness Trailblazer is pushing brands to not only deliver effectively on their promises in these categories, but also begin to deliver supplements and solutions that are even more targeted in these sectors. For example, a probiotic that is specifically formulated to support health of the mind alongside the gut will excite them.

For them, brands should showcase investment in scientific research and clinical studies which not only prove efficacy, but a dedication to delivering on specific needs of consumers.

Believing in the connection between physical health and mental wellbeing, they are drawn to products that enhance this connection. They are the champions of the growth of holistic wellness, and the power of community and social connection.

Health-conscious • Tranquil • Holistic • Mindful • Wellbeing-focused • Harmonious
• Nurturing • Serene • Organic • Balanced

The mouth as the gateway to total health



For the Wellness Trailblazer, oral care is no longer a superficial hygiene ritual, it is a daily health intervention. This archetype views the mouth as the gateway to systemic wellbeing, intrinsically connected to gut health, immunity and even cognitive function. As understanding of the human microbiome matures, so too does scrutiny of how oral care products interact with this delicate ecosystem.

Historically, dental care has been positioned around eradication: killing bacteria, eliminating plaque, sterilising the mouth. For the Wellness Trailblazer, this narrative feels outdated. They recognise that not all bacteria are harmful. In fact, microbial diversity and balance are fundamental to health.

The opportunity for brands lies in shifting from antimicrobial dominance to microbiome modulation.

This mirrors the evolution already seen in gut health.

Innovation in this space is expanding rapidly.

Oral probiotics designed to support gum health, prebiotic substrates that selectively nourish beneficial bacteria, post-biotics that reinforce epithelial barrier function, and pH-balancing formulations that protect enamel

while maintaining microbial harmony all represent fertile ground. Importantly, this consumer is sceptical of vague “natural” claims. Clean-washing is a major turn-off. Botanical extracts without substantiation will not suffice.

The emerging dialogue around the oral-gut-brain axis further amplifies interest. Links between oral dysbiosis, systemic inflammation and broader health outcomes are increasingly discussed in scientific and consumer spheres alike.

Products that frame oral ecosystem balance as part of a holistic resilience strategy - supporting both physical and mental wellbeing, resonate strongly.

For brands, the whitespace lies in positioning oral care as a precision wellness category.

The Wellness Trailblazer is ready for clinically substantiated oral probiotics, microbiome diagnostics and synbiotic formats that go beyond toothpaste.

The brands that lead will not rely on marketing rhetoric; they will demonstrate research investment, transparency and a genuine commitment to advancing human health, starting with the mouth.

\$8.9bn

“Growth by 2032 in the sustainable oral market”
Market Research, 2025

\$4bn

“Probiotic market exceeding \$4 billion by 2030 driven by new product formats”
Future Market Insights, 2026

88%

“Of British consumers reported that brushing their teeth isn’t just for a whiter smile but also a healthy microbiome.”
Stylus 2026

32%

“Consumers now prefer natural and herbal care formulations.”
Research Report 2026

Boosting Bacteria

Boosting Bacteria: Recognising the importance of supporting beneficial bacteria, brands are developing products that actively strengthen the gut and oral microbiome with live probiotics.

In the oral microbiome products market, oral probiotics are expected to lead with about **63.3% share** in 2026, followed by microbiome-friendly toothpaste at **20.8%**.

The dental-care probiotics sector is expanding strongly, with multibillion-dollar forecasts to **2035** and compound annual growth in the mid-single digits to high-single digits.



BOKA-ORAL CARE PROBIOTIC

Spotlighting the Oral Microbiome: More than ever, consumers are recognising the crucial link between oral hygiene and broader health goals and targeting their oral microbiome to improve holistic wellbeing.

A rise in probiotic oral care products are nurturing beneficial bacteria in the mouth.

RIVEN-PROBIOTIC MOUTHWASH

The probiotics used in Riven Rinse crowd out pathogenic bacteria and act as a protective shield to help you achieve an optimal oral climate," [says](#) co-founder Dr Fatima Khan. "The strain lactobacillus reuteri reduces biofilm formation and helps reduce gingival inflammation, whereas lactobacillus paracasei antagonises cavity-causing bacteria. The prebiotics then serve to nourish the probiotics.

OLAS-MARINE BIO ACTIVE

US oral health retailer [Olas](#) is inspired by a deep respect for the healing power of the ocean.

Its [Marine Bio-Active Mouth Rinse](#) contains a natural blend of bio-active ingredients shown to strengthen oral immune support, prevent plaque-causing bacteria, restore fresh breath, and reduce oral inflammation.

GALLINEE-PROBIOTIC TOOTHPASTE

French microbiome skincare brand [Gallinée](#)'s oral care range embraces a supportive approach to the existing oral bacteria ecosystem. Its Prebiotic Toothpaste strengthens good bacteria, while the Mouth & Microbiome Supplement tablets contribute to the maintenance of healthy mucous membranes and 'feed good' gut bacteria.

The Tech Voyager

The Tech Voyager approaches healthcare and a dedication to longevity with the same curiosity and enthusiasm they apply to other aspects of their tech-driven life. They seek products that offer innovative, high-performance solutions and are eager to explore how technology can enhance their healthspan.

The consumer attitude of early adopters, this group has the financial capabilities and desire to invest in new and potentially game-changing products - even if it means being among the first to try them. This willingness to experiment with emerging technologies sets them apart from more traditional consumers.

They appreciate products that can be tailored to their specific needs, especially when it comes to their health. Technology which can give them the most advanced readings of their physical make-up for a highly-detailed understanding of not only their current health status, but also what lies ahead. The modern capabilities of being able to understand how our genetics and epigenetics can present in the future is incredibly valuable to the Tech Voyager, as it helps them to choose their supplements confidently.

They seek to simplify their lives, utilising AI to learn their habits and predict their needs. It's for this reason that advancements in wearable technology are being fuelled by this special consumer. They are also responsible for the growing number of individuals who are building as complex a life online as IRL, using platforms like Roblox.

Committed to research and efficacy, the Tech Enthusiast will devour online reviews, understanding the technical aspects of ingredients and formulations, as well as contribution to sustainability which also drives their purchasing decisions.

Enthusiastic • Dedicated • Tech-savvy • Innovative • Committed • Explorer • Progressive • Inquisitive • Engaged • Forward-thinking



Rewiring Oral Care for the Longevity Era



The Tech Voyager does not see oral care as a routine. They see it as a data stream. For this early-adopting, longevity-focused consumer, brushing is no longer a two-minute task - it is a measurable health behaviour with systemic implications. As research continues to link oral inflammation with cardiovascular disease, metabolic health and cognitive decline, the mouth is being repositioned as a diagnostic gateway. This is where the Tech Voyager leans in.

AI-powered devices such as Oral-B iO Series and Philips Sonicare 9900 Prestige have already elevated the category.

Real-time 3D mouth mapping, pressure sensing and habit-tracking apps transform brushing into a feedback loop. But for this consumer, this is merely the baseline.

The real value lies in longitudinal data, understanding brushing coverage trends, gum stress patterns and behavioural compliance over time.

Beyond hardware, microbiome intelligence is emerging as the next frontier. Companies like **Bristle Health** now offer at-home saliva sequencing, providing risk scores for cavities, gum disease and halitosis.

For the Tech Voyager, this unlocks true personalisation: selecting nano-hydroxyapatite, arginine systems or targeted probiotics based on their unique bacterial profile. Oral care becomes precision biology.

Wearable integration is also gaining traction. Brands inspired by the biometric ecosystems of **WHOOP** and **Oura Health** are exploring smart mouthguards that track bruxism, sleep quality and inflammatory markers via saliva sensing. As health dashboards centralise data from multiple devices, oral metrics are increasingly positioned alongside heart rate variability and recovery scores.

Crucially, the Tech Voyager values transparency. They will interrogate ingredient efficacy, scrutinise peer-reviewed studies and assess sustainability credentials before purchase.

For brands, the opportunity in 2026 is not simply to create smarter brushes. It is to build connected oral ecosystems, integrating diagnostics, formulation personalisation, subscription replenishment and predictive insights.

The Tech Voyager is willing to invest, experiment and evangelise.

In their world, oral care is no longer cosmetic or even preventative. It is a controllable variable in the pursuit of extended healthspan and technology is the interface.

\$865m

“Electric toothbrush market projected by over 55 million this year.”

Global Growth Insights, 2026

3.3bn

“The global smart toothbrush market is projected to reach 3.3 billion in 2030”

Data Bridge Market, 2025

50%

“50% of new launches will integrate smart connectivity with 35% of millennials reporting that they prefer AI brushing features.”

Global Growth Insights, 2026

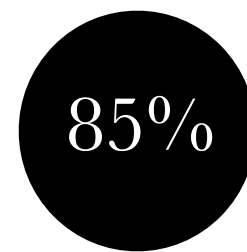
3-4bn

“The global saliva diagnostics market is set to reach up to 4 billion by 2030”

Grand View Research, 2025

Enhanced Experience

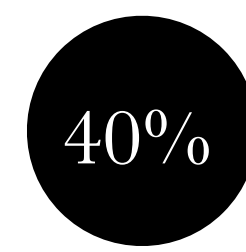
Smart brands are elevating at-home experiences with premium products tapping into self-care, mindfulness and empowerment trends, fuelling a positive change in oral care routines and products used. Ritualistic moments of pleasure alongside luxury tech advancements are propelling this category into one of desire rather than chore.



Smartphone oral-health screening systems show **75–85% diagnostic accuracy** in early studies.



30% improvement in dental health when users opt for a smart app-connected toothbrush.



In-person orthodontic visits are set to decrease by 40% with innovative remote monitoring apps.



21% is the year on year growth in AI-powered dental apps and tools in consumers homes.



FOREO-PROBIOTIC MOUTHWASH

Swedish company [Foreo](#) harnesses the power of tech to break down plaque with its ISSA 3 – the world’s first silicone sonic toothbrush. The front of the 360° brush head cleans teeth and gums, while the back cleans the cheeks and tongue. The electric toothbrush market is projected to reach \$6.1bn by 2027 ([Future Market Insights](#), 2022), highlighting the increasing awareness of their advantages.



FENO-TOOTHBRUSH

Toothbrush innovation from [Feno](#). This brand has rethought the idea and classic shape of toothbrush design that has remained relatively unchanged for centuries. The smart brush technology allowed the user to brush each tooth all at the same time boasting a full deep clean in 20 seconds. The brush connects to its own app educating the user on their tooth and gum health.



LUMOROL LIGHT-ACTIVATED MOUTH RINSING KIT

Finnish scientists have introduced an [innovative oral hygiene solution](#), Lumoral (Koitte Health Ltd., Espoo, Finland), the first antibacterial photodynamic device designed for home use. Lumoral harnesses light energy to combat oral diseases and complements existing cleaning methods to enhance home oral care. By selectively eliminating harmful bacteria in dental plaque, Lumoral represents a revolutionary advancement poised to transform oral health.



SOOCAS-WATER FLOSS TOOTHBRUSH

Multifunctional toothbrush systems are improving dental practice by combining brushing and flossing in one. China-based Soocas's [NEOS II](#) cleans both the tooth surfaces and gaps, achieving 35 times more stain-fighting power, 100% plaque removal and whiter teeth in three days. Singapore-based [OraHubs'](#) 3-in-1 modular design for the OraWand alternates between tongue scraping, flossing and brushing, and induces 37,000 vibrations per minute.

The Savvy Saver

During this difficult period of tightened purse strings for many, the **Savvy Saver** and their attitude to spending is strategic and practical. They focus on finding the best value for money and making informed decisions to reduce spending, while still maintaining their important routines.

The Savvy Saver is the group most driven by the cost of living crisis, which has significantly affected their disposable income. They therefore seek products which meet basic quality demands in their care regime, without compromising on essential quality.

Because of this (often severe) financial pressure, they are one of the attitudes who deal with stress on a daily basis. With the prevalence of online discussions on this health topic and therefore heightened awareness of its effects, areas of health such as this will be prioritised within the budget available to a Savvy Saver.

They feel little allegiance to individual brands; their loyalty lies more with retailers who can offer them deals on brands, or whose own-brand products are competitively-priced. Retailers will also gain allegiance from the Savvy Saver through loyalty schemes and bulk-buying deals, which reduce the per unit cost and allows them to save money over time whilst taking advantage of higher quality products.

Due to the broad impact of the cost of living crisis, this multi-generational group spans younger generations funding their day-to-day life independently for the first time, through to older generations who will likely be supporting younger members of their family.

Their savviness also lies in their ability to DIY. They tap into trends they find online, traditional ingredients they can use to craft health solutions at home, or multi-use products which can replace specialised items, to further cut down on costs.

Value-conscious • Frugal • Discount-driven • Brand-flexible • Deal hunters • Resourceful • Practical • Strategic • Economical



The age of economic reality



45%

"40-45% of survey respondents said they tried DIY methods of oral care such as oil pulling"
International Journal of Scientific Development and Research, 2025

35%

"Toothpaste still holds 35% of the market share and whitening toothpaste alone holds 42%-55% which means that cost-effective solutions are a huge priority to continuing to increase share"
Mordor Intelligence, 2026

17.6%

"Uptake in global subscription services which offer cost-effective services"
Growth Marketing Report, 2025

13.5%

"Year on year value sales grow and in 2025 price conscious value brands went up by 13.5%"
The Grocer, 2025

The Savvy Saver represents one of the most commercially significant consumer shifts in Oral Care today. Under sustained cost-of-living pressure, this group has not deprioritised oral health they have reframed it through the lens of economic efficiency. Brushing twice daily remains non-negotiable, what changes is how value is assessed.

For the Savvy Saver, Oral Care is preventative healthcare. Avoiding fillings, gum treatments, or emergency dental work is viewed as a rational financial strategy.

Products that clearly communicate cavity protection, gum defence, and enamel strengthening resonate strongly - particularly when backed by recognisable science rather than cosmetic claims.

Brand loyalty, however, is fluid. Allegiance often sits with retailers such as **Tesco, Asda, Superdrug** and **Boots**, whose loyalty schemes and own-label ranges provide transparent savings.

The improved quality of private label fluoride toothpastes, sensitive variants and whitening formulations has recalibrated expectations of what "budget" means.

For many Savvy Savers, own-brand is no longer compromise, it is smart shopping.

Brands must therefore compete on tangible metrics: price per millilitre, multi-buy mechanics, and family pack formats.

Larger SKUs, refill pouches and "X months protection" claims provide psychological reassurance.

Stress is another defining factor. Financial strain increases sensitivity to overall health, particularly gum care and inflammation - issues widely discussed online.

Affordable daily prevention feels like control in uncertain times.

Gum-protect variants, stannous fluoride positioning and sensitivity relief at entry-level price points are strategically aligned with this mindset. For brands, the growth opportunity lies in intelligent democratisation.

Refill systems that genuinely reduce cost, subscription discounts without premium framing, and credible "no-nonsense" clinical positioning will win.

Sustainability resonates only when it lowers long-term spend.

The Savvy Saver is not disengaged from Oral Care innovation - they are demanding accountability from it.

In a market historically driven by premiumisation, the next phase of growth will belong to brands that can prove efficacy, simplify choice, and demonstrate measurable value per day.

Smile to Order

Brands are reshaping oral care routines and rituals by creating moments of joy and mindfulness through wellness-inspired concepts, while creative design concepts in dental clinics elevate the patient experience.

£2k

Cost saved on treatment when opting for a supermarket brand electric toothbrush vs a manual toothbrush.

5x

Cost effective own brand products are growing 5x faster than the total market The Grocer, 2025

30%

Supermarkets gain up to a 30% profit margin on own brand products so will continue expanding.



MADE BY DENTISTS

Made By Dentists is, (unsurprisingly) made by dentists and is available at Target and Walmart. The range created by dental entrepreneur Barry Buckley and sisters Vanessa and Lisa Creaven from Ireland (a brand of Spotlight Oral Care) have intentionally created ranges that are inexpensive and yet still professional in results.

In 2023, Made By Dentists' sales rose over 130% from the prior year and continues to grow exponentially.



SUPERDRUG PRO CARE

Superdrug developed the PRO Care range to make dental care accessible from daily hygiene to whitening ranges, in 2024 Superdrug made the range 20% cheaper and this year have widened the range with flavoured toothpastes.

Superdrug's Own Brand Director, Jamie Archer, says: "As a leading accessible health and beauty retailer, we believe that everyone should have access to the products that protect their health and wellbeing and at an affordable price. Our ProCare range has been developed by oral care experts, ensuring that the wide range of products caters for everyone and fits into every aspect of a daily routine."



LIDL'S DENTALUX

Lidl's Dentalux range combines the two things this audience values most: predictably low shelf pricing and acceptable everyday performance. At roughly £0.69 for a 100-125 mL tube, it brings the monthly cost of brushing down to around £0.35 per person, creating a clear value advantage over branded toothpaste, subscription models, and toothpaste tablets. For budget-conscious shoppers, the appeal is not innovation for its own sake but the reassurance that they can meet a basic household need at the lowest realistic cost-per-use without compromising on core fluoride protection

The Eco Guardian

The **Eco Guardian** lives by a high standard of green practices and purchasing habits. And they expect the companies they buy from to be exercising these same practices as standard, to meet their forward-thinking demands.

When it comes to vitamins, supplements and health and wellness practices that contribute to a healthier ageing process, their dedication to sustainability presents strongly in their choice of ingredients. They feel a deep connection to natural ingredients, sourced sustainably (including being kind to animals if they are animal-based ingredients) and formulated in a way that is less harmful to the environment. They often champion ingredients rooted in tradition and holistic philosophies.

Champions of the conscious consumption movement, the Eco Guardian will avoid needless additions to their care regime, seeking instead multi-functional products which help them to reduce their waste contribution. However, brands will certainly be capable of enticing new Eco Guardian customers through a commitment to packaging which is minimal, reusable, or refillable.

With this should also come clear, honest, authentic marketing. The Eco Guardian is committed to researching the products they're purchasing, and expect brands to be communicative and upfront in launching their products to the world. It is for this reason that smaller and local independent brands appeal to the Eco Guardian, eco-conscious in their smaller batch productions which reduce their carbon footprint.

Eco Guardians span multiple generations, from Gen X and Baby Boomers who recognise their purchasing power, to younger Gen Zs who expect companies to prioritise sustainability as standard - and know their power in moving the market leadership dial.

Environmentally-conscious • Sustainable • Eco-friendly • Green • Responsible • Ethical • Protective • Resource-conserving • Organic • Earth-minded



Oral Care, Reengineered



3.21bn

"The biodegradable toothbrush market is set to grow to 3.21 billion by 2033 which is an 8.4% growth"
Stylus 2026

39%

Brands with eco-packaging and fluoride innovation grew consumer base by 39%
Market Research Report, 2025

90%

A 2026 packaging shift means **90%+ of current tubes are now HDPE recyclable tubes.**

120mn

"The global toothpaste tablet market is predicted to grow from 71 million to 120 million."
IMARC Group. (2026). Toothpaste

The Eco Guardian is redefining what "good" looks like in oral care. For this consumer, sustainability is not a secondary benefit or marketing overlay, it is the entry requirement. From ingredient provenance to packaging end-of-life, every touchpoint must withstand scrutiny.

Waterless innovation sits at the forefront.

A significant proportion of oral care's environmental burden is linked not only to manufacturing, but to consumer behaviour, particularly the culture of rinsing with taps left running.

Anhydrous formats such as toothpaste tablets, powders and solid bars address both sides of the equation: they remove added water from the formulation (reducing shipping weight and preservative load) while subtly reframing the brushing ritual itself.

Yet format alone is not enough. The Eco Guardian interrogates ingredient sourcing with the same intensity - regeneratively farmed botanicals, traceable glycerin supply chains and cruelty-free certifications are expected as standard.

Microbiome-conscious formulation is another emerging frontier.

Rather than sterilising the mouth, forward-thinking brands are exploring prebiotic and probiotic support, pH-balancing systems and the reduction of harsh surfactants.

This ecosystem mindset mirrors the Eco Guardian's broader environmental philosophy: protect, rebalance and sustain rather than strip and replace.

Packaging remains a decisive battleground. Aluminium tubes, compostable materials, refill stations and take-back schemes offer tangible circularity. However, credibility depends on transparency, lifecycle data, carbon reporting and clear communication around recyclability limitations. Vague green claims are quickly dismissed.

Importantly, the Eco Guardian resists unnecessary product proliferation.

Multifunctional formulations combining enamel repair, gum support and whitening in one reduce SKU sprawl and waste accumulation. Fewer, better products align with conscious consumption values.

Spanning generations from empowered Gen X and Boomers to climate-literate Gen Z, this archetype understands its purchasing leverage. They reward brands that embed sustainability structurally, not cosmetically.

In 2026 and beyond, oral care growth will increasingly come from those willing to redesign systems, not just packaging in service of a genuinely lower-impact future.

Sustainability

Progressive packaging and ingredient innovations continue to take shape in the oral care market, as brands rethink how they can offer quality products via res

43%

43% of individuals have purchased a health and wellness product or service directly on a social channel.

26%

26% are likely to purchase after engaging with health and wellness content on social media.

5bn

Sales of weight management supplements are estimated to total \$5.24 billion in 2024.



SURI-SUSTAINABLE TOOTHBRUSH

Hoping to entice eco-enthusiasts is British newcomer Suri. Its inaugural electric toothbrush combines a bio-based disposable brush head with a reusable aluminium handle. The head is made from a mix of corn starch [PLA](#) and castor oil, and can be returned to the company to be properly disposed of. The aluminium element is readily recyclable at the toothbrush's end of life. It also has a simple modular design to allow for repairs. This means Suri can fix, reclaim or recycle materials from older brushes.



ROCC-CLEAN NATURAL TOOTHPASTE

Australian sustainable oral care brand [Rocc](#) formulates its toothpastes with clean ingredients, vitamins and minerals, such as antibacterial green tea and corn-derived xylitol to sweeten the paste without sugar. And US-based Estrella's [Activated Charcoal Toothpaste](#) naturally whitens and targets stains. Grape seed extract combats plaque and decay, while bamboo powder cleans and polishes.



TOOTH BE TOLD-REFILLABLE CHARCOAL

In the UK, [Tooth Be Told](#)'s charcoal-infused toothpaste is housed in sustainable tin and bamboo reusable structures. The charcoal toothpaste comes in the recyclable tins that then slot into the bamboo holders. This gives an elevated sustainable look to add to the bathroom shelf. The brand boasts 100% vegan packaging and product.



MIGHTY-REFILLABLE TOOTHPASTE

British oral care challenger [Mighty](#) has made its debut, claiming a category first for its refillable toothpaste dispenser and 100% microplastic-free refills.

The brainchild of Native [Snacks](#) founder Charlie Bowker, Mighty's mission is eliminate the global number of single-use toothpaste tubes – billions of which end up in landfill or the ocean each year.

The opportunities

Understanding your sector

In a space experiencing staggering growth and diversity, yet with more growth potential and space for innovation (in particular for burgeoning private and own label brands), do you understand where your brand's potential lies?

Understanding your audience

Once your path to growth becomes clearer, establishing the customers who offer the potential for success and for whom your products are most desirable, is the next step in ensuring you are successful in the launch of a new brand or product. Do you recognise which consumer attitude you hold power with, and is this the audience you wish to nurture?

Understanding your product

With your audience comes a clear goal of what it takes to build a product which truly appeals to them. From ingredients and formulation, to packaging and pricing, brands must approach every stage of production with honesty, integrity and authenticity. Does your range meet the standards of the educated and demanding customer of today?

Understanding your communications

The means by which you deliver your product to your desired consumer is key. The world is returning to the high street, and experiential retail combined with intelligent, targeted online platforms - not to mention the ongoing growth of social commerce - is an art form which must be learned in order to deliver to your target audience. Do you know where your consumers are sourcing and shopping?

Understanding your competition

Today's competitive landscape extends beyond rival brands, it includes shifting consumer expectations and the nuanced trade-offs that come with new product or redefining a brand goal. It's essential to evaluate not just who you're attracting, but who you risk leaving behind. How do you grow your audience without diluting your brand?

Understanding your identity

It may be that you are approaching a new product - or a revamp of your brand - in order to enter a new space or appeal to a new consumer audience. Is your brand identity clear, and are you able to retain your existing consumer base, whilst entering a mission to engage with new attitudes?



Here to help

We hope you found our insights valuable, highlighting the opportunities within the health and longevity sectors, as well as the evolving consumer attitudes shaping this space.

We'd love to help you uncover where your brand's potential lies, how to stay ahead of emerging trends with high growth potential, and how to connect meaningfully with consumers who have greater awareness and more nuanced demands than ever before.

We'd be delighted to present these findings in a tailored format, crafting a personalised report that positions your brand to lead in this evolving landscape.

Get in touch - we're excited to explore what's possible together.

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