

# Oral Care Category

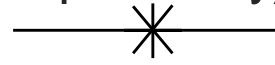


## Market Spectrum and Range of Visibility

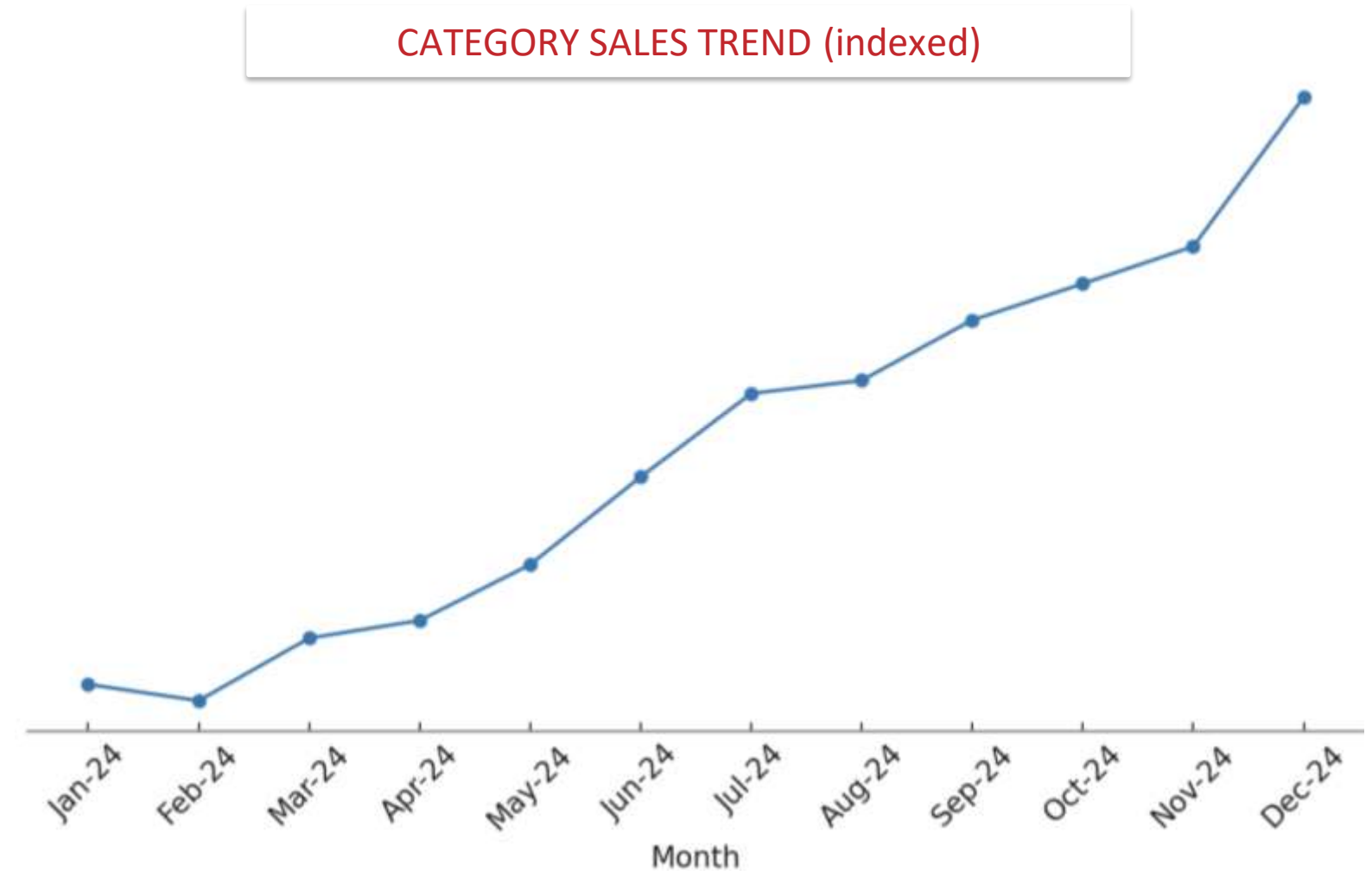


# Oral Care Category Trend

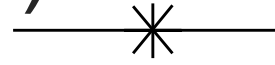
(Includes Toothpaste only)



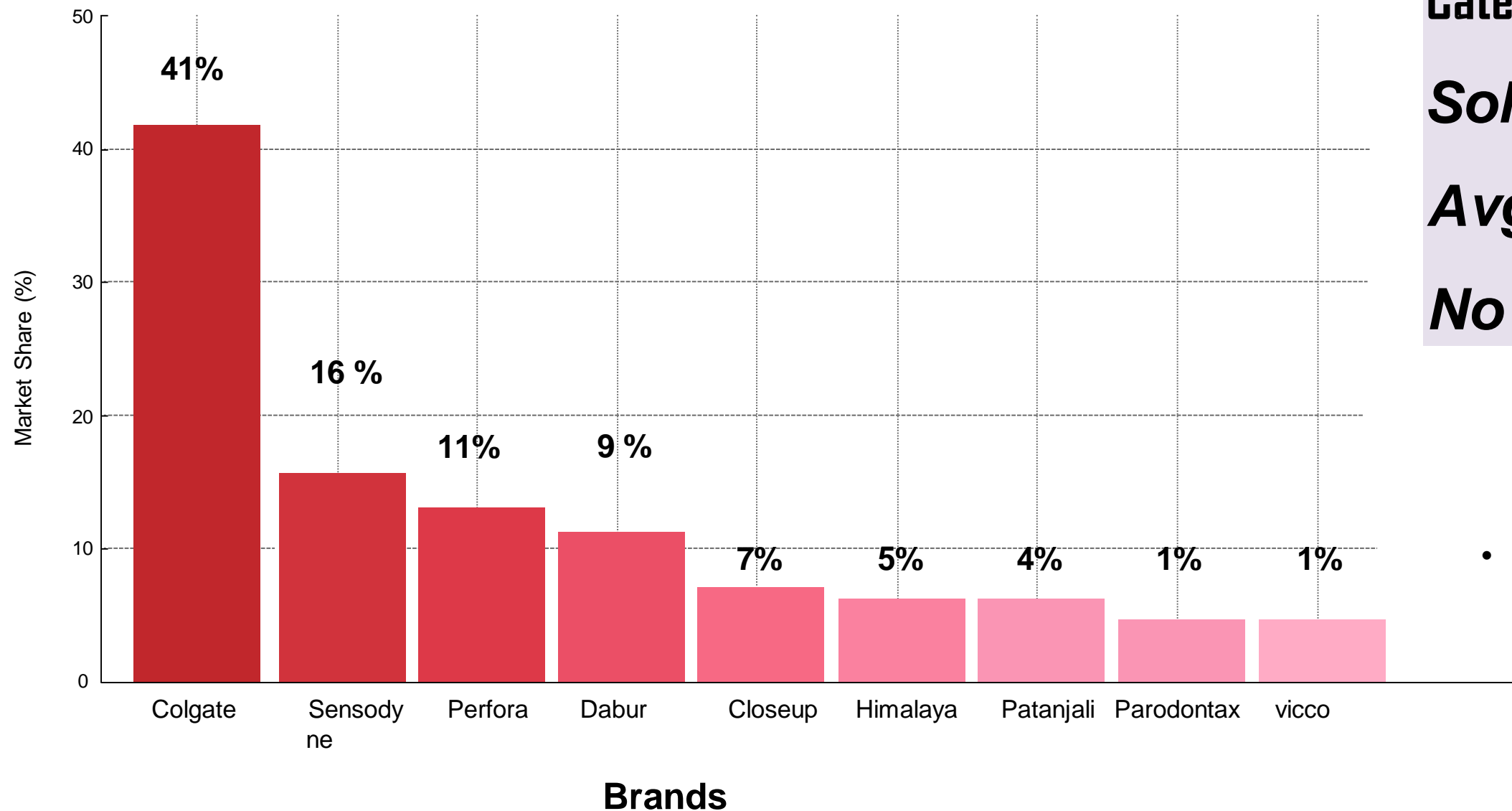
- Oligopolistic Market:** Dominated by a few strong brands like Colgate and Pepsodent, making entry difficult for new players.
- Brand Loyalty:** Consumers prefer established brands, limiting opportunities for emerging competitors.
- Steady Growth:** The market has grown at a **4% CAGR** over the last six months, driven by increasing oral hygiene awareness and product innovation.
- New SKUs Impact:** *Herbal, fluoride-free*, and specialized variants are expanding consumer choices and boosting sales.



# Oral Care Market Overview – Mumbai (Toothpaste)



## Top Brands By Product Share



**Category Size** (monthly) - **₹1.05 Cr Units**

**Sold** - **60k ~**

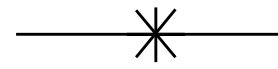
**Avg Selling Price** - **₹200**

**No of Dark-stores** ~ **102+**

- Colgate is the market leader with 41% market share



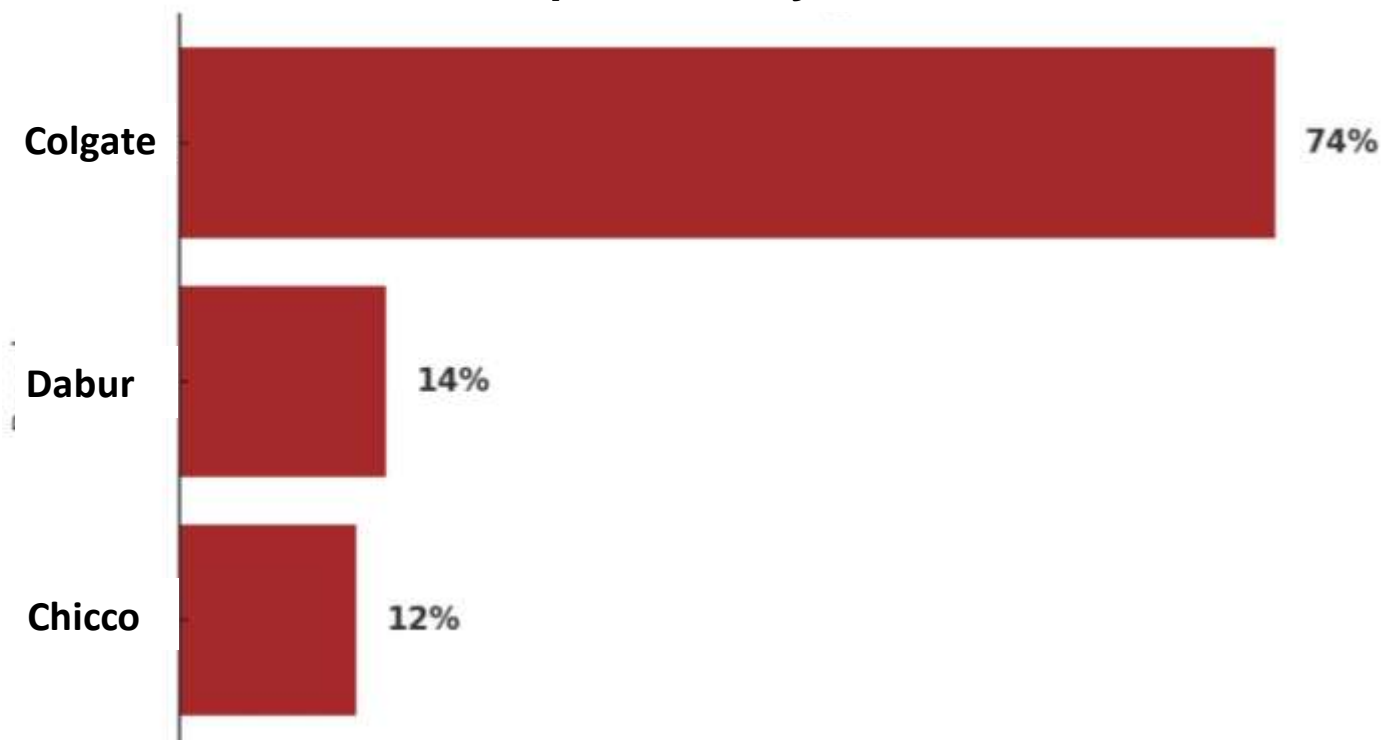
# Oral Care Market Overview



## Kids Segment (8%)

ASP : INR 185

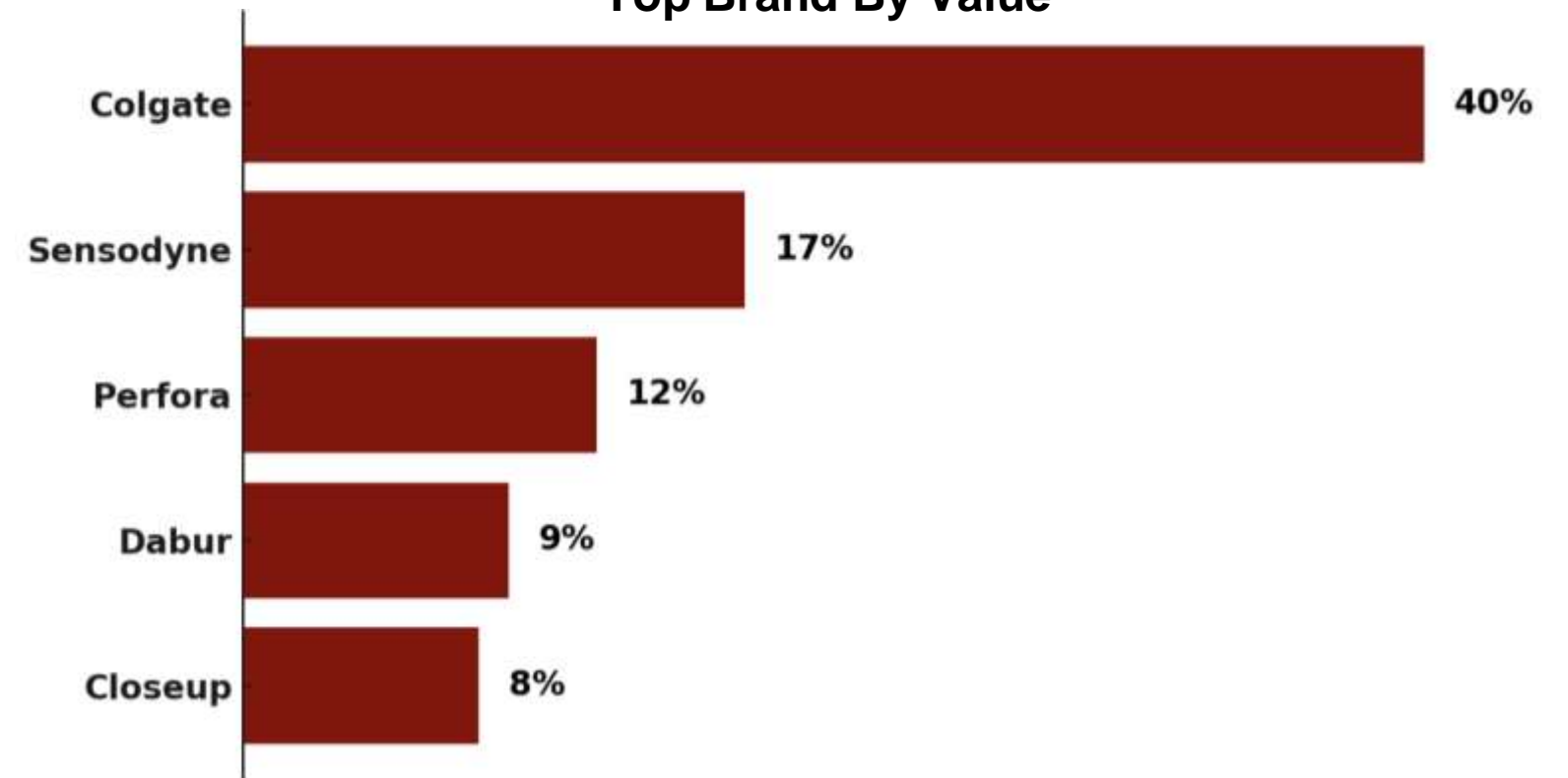
Top Brand By Value



## Adult Segment (92%)

ASP : INR 215

Top Brand By Value

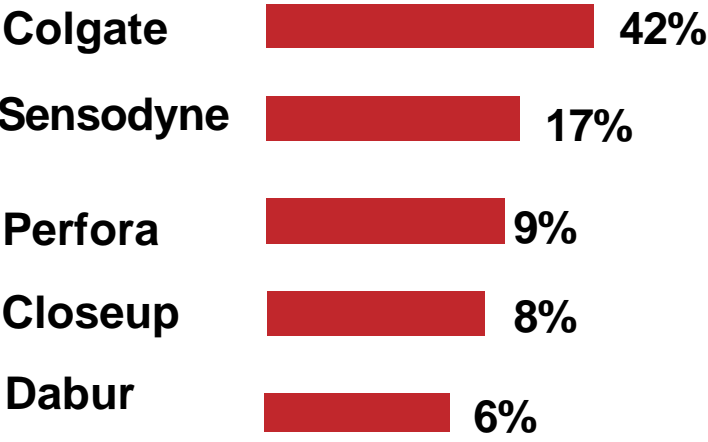
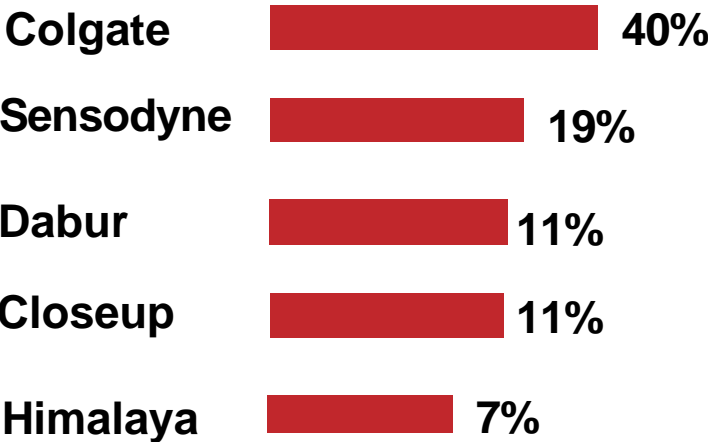
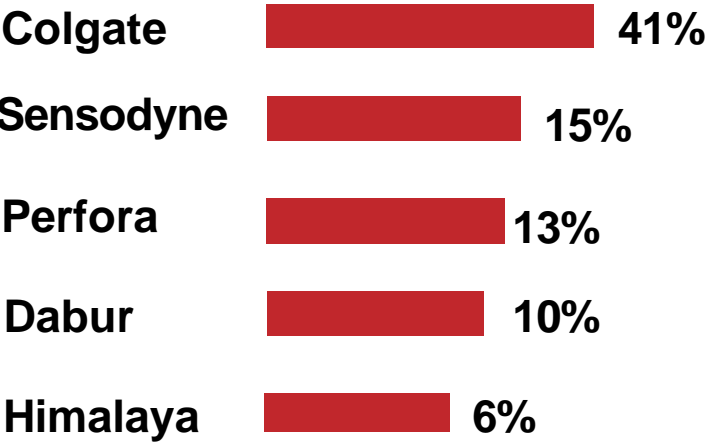
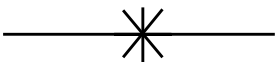


- Colgate dominates both segments, with **74% in kids** and **40% in adults**, but adult market competition is more diverse.
- Adult segment (92%) has a higher ASP (215) than kids (185), indicating greater spending on adult oral care.



# Top Performing Brands in Different Areas

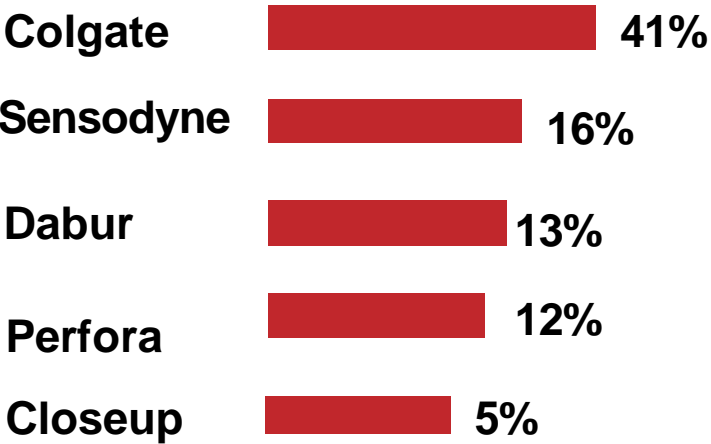
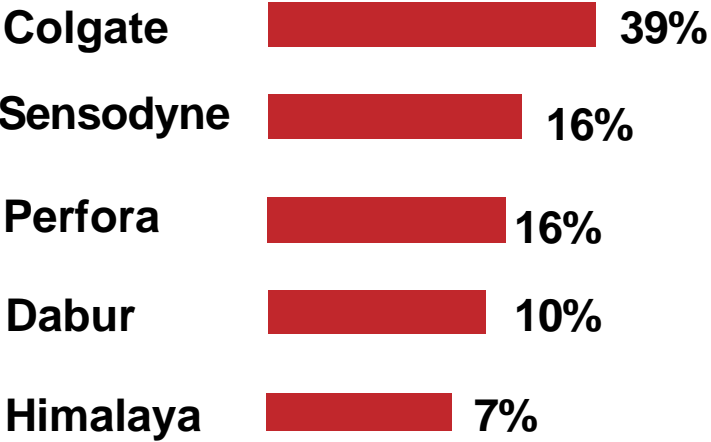
## Zone wise sales Mumbai



### NORTH MUMBAI

### CENTRAL MUMBAI

### WEST MUMBAI



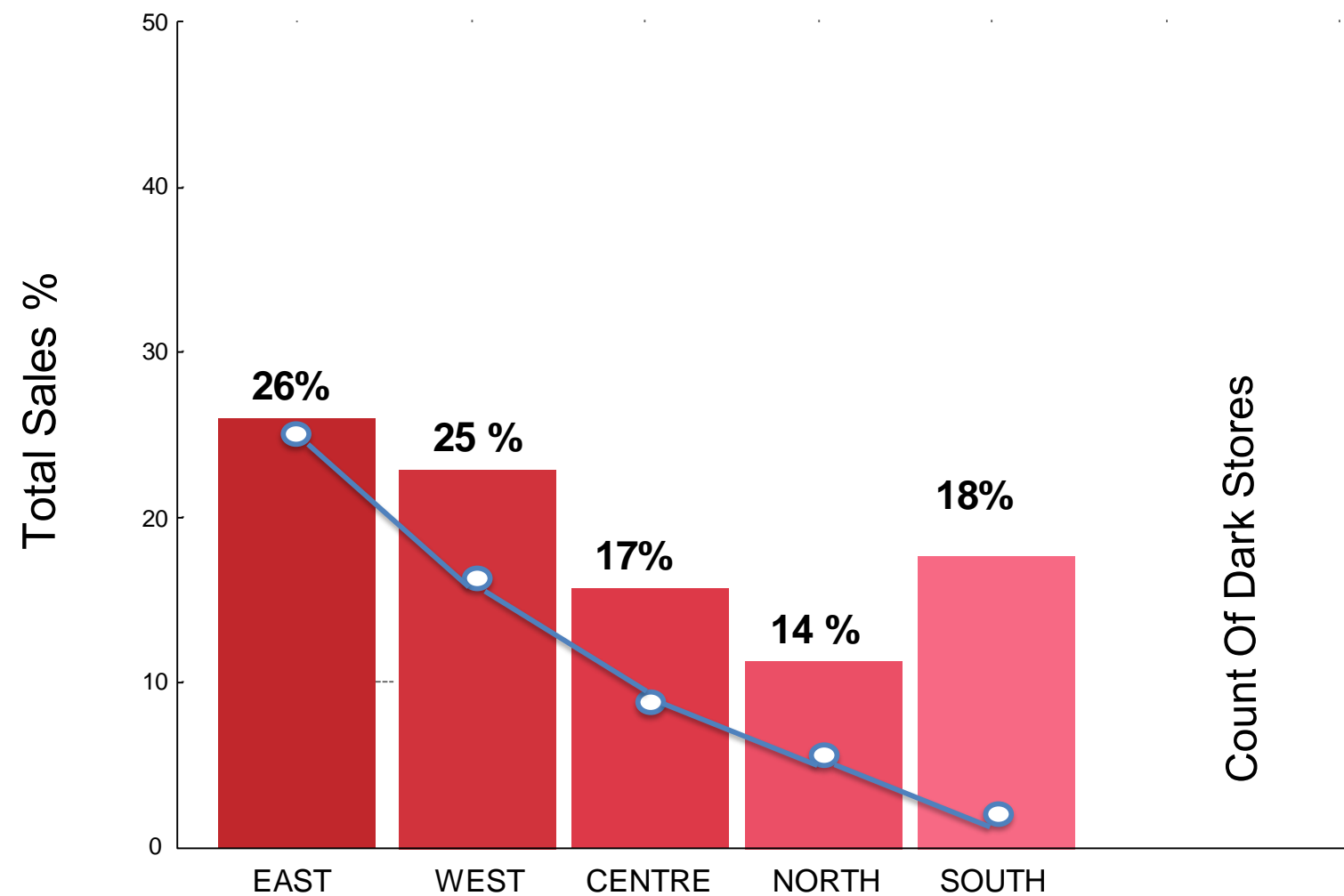
### EAST MUMBAI

### SOUTH MUMBAI



# Category Sales and Dark Stores Across Mumbai

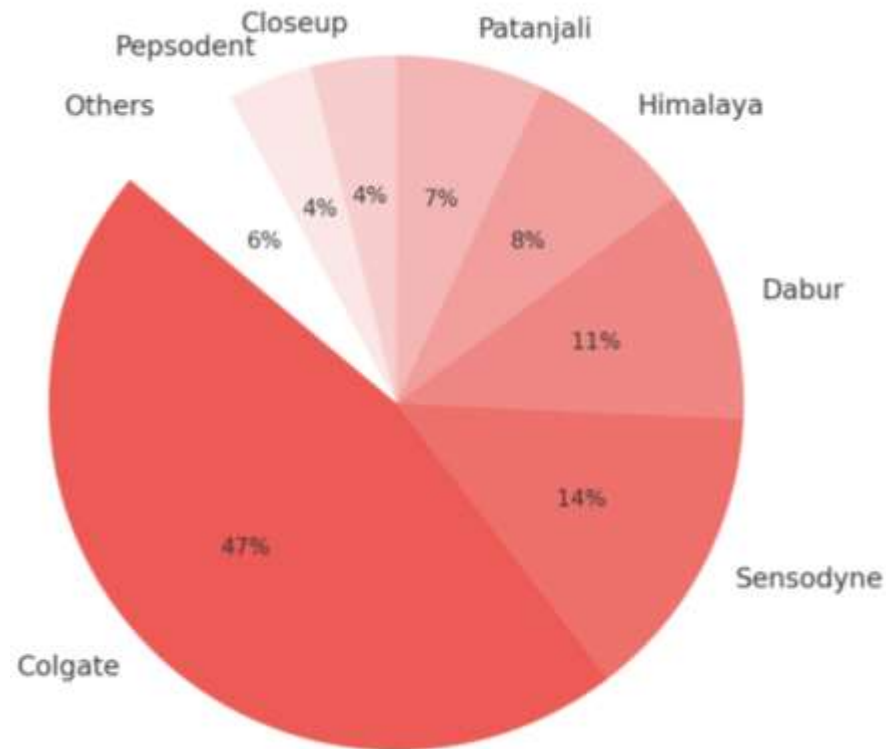
## MUMBAI



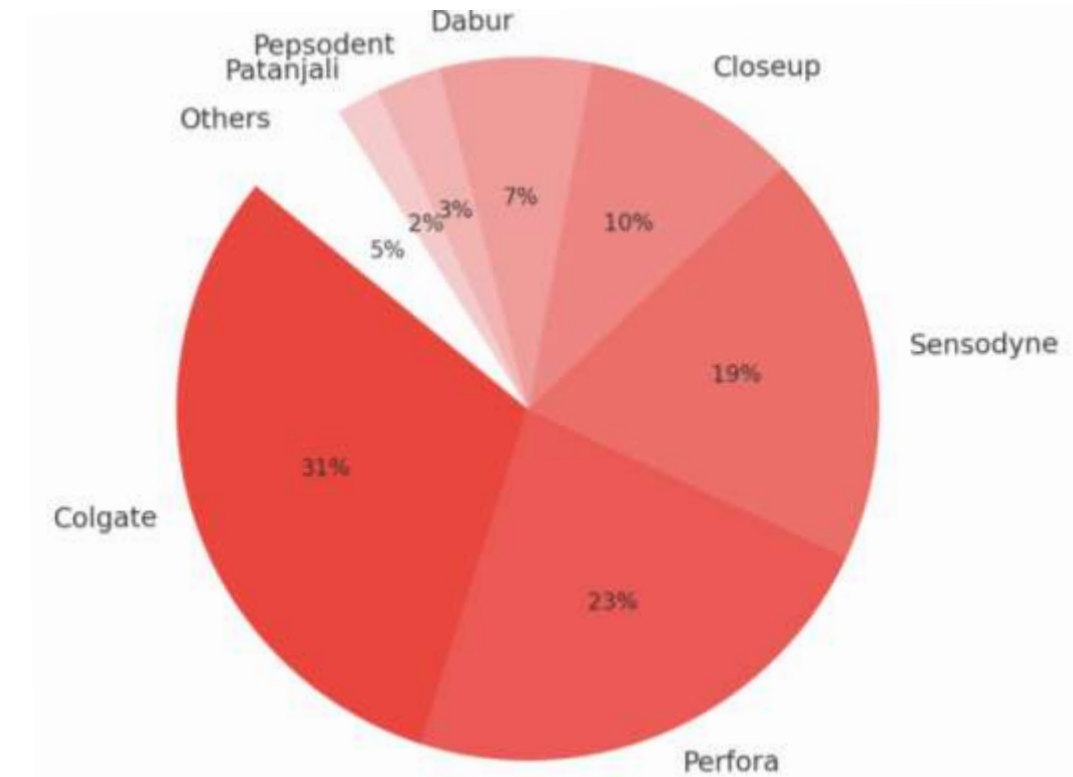
- **51%** of the revenue is contributed by top 2 **Zones (East and West)**.
- There are 100+ dark stores are present in **Mumbai**.
- **South Mumbai** has the lowest number of dark stores but the average sales per dark-store is 15% - 20%(approx.)higher than the other zones.



# Segment Snapshot - Single Units – By Price Range



**Smart value**  
MRP below ₹220

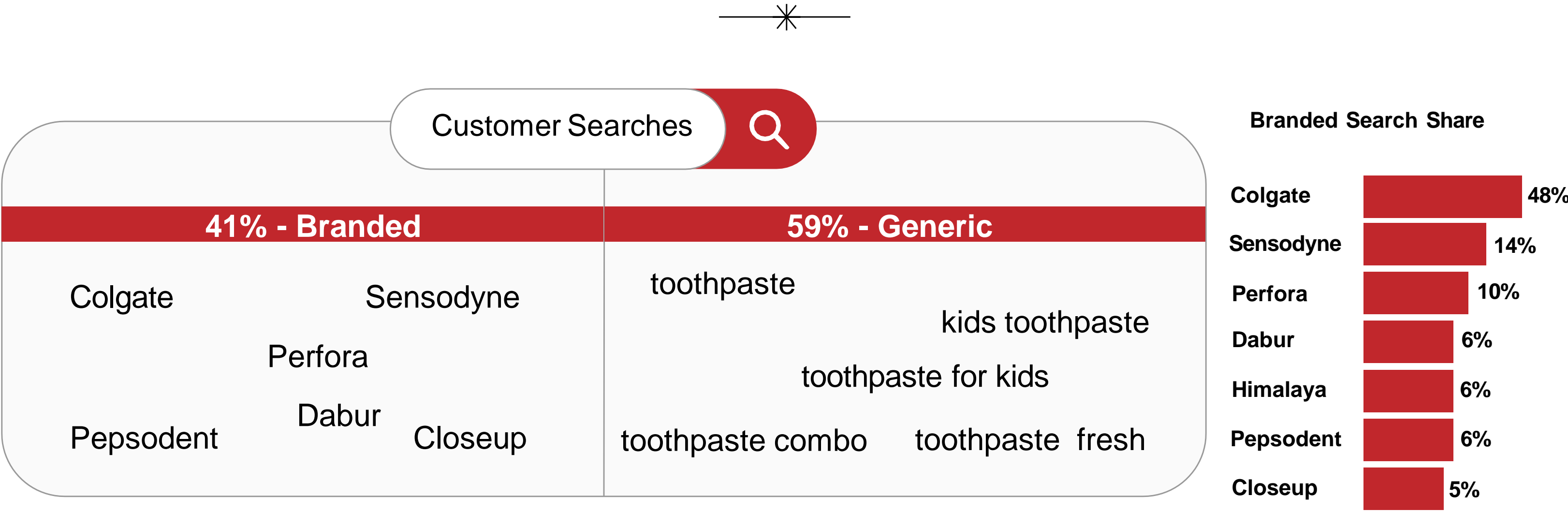


**Balanced Care**  
MRP above ₹220

- The market is largely **dominated by Colgate** in Economic & Premium segment.
- Perfora has placed itself under Premium segment spreading a market awareness about its cleanliness and modernness.
- **Sensodyne** has grabbed 2nd highest market Share in economic segment and 3rd in high valued segment.



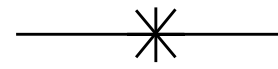
# Customers' Search Behavior—Brands on the mind



- Branded keywords dominate with **41%** share, reflecting strong brand recall and consumer preference.
- In branded searches, Colgate has the highest number of searches, followed by Sensodyne and Perfora, an emerging brand.



# Catching Eyeballs – Brand Visibility



*Organic Visibility*

**Colgate**

29%

**SENSODYNE**

14%

**closeup**

7%

**perfora**

7%



*Paid Visibility*

**Colgate**

18%

**Dabur**

7%

**SENSODYNE**

4%

**closeup**

2%

- In Both Organic and Inorganic Colgate is the leader
- Sensodyne is the second leader in organic visibility



# New Entrant Concept Product



## Desirable features

- *Effective Cleaning*
- *Fresh Breath*
- *Gentle on Gums*
- *No Harsh Chemicals*
- *Ingredients Fluoride / Natural Extracts*

## 1. Pricing

- Average Selling Price : Rs 215
- Pricing Sweet Spot Range : Rs 195 - 225

## 2. Specifications

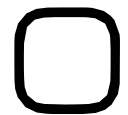
- **Type:** Gel, Paste, Herbal, Sensitive, Whitening
- **Size :** 100gm, 200gm, 250gm

## 3. Material

Water, Fluoride, Calcium Carbonate, Mint, Clove, Neem



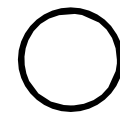
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