Dental Products in China

Industry Study with Forecasts for 2012 & 2017

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Demand to increase 11% per year through 2012

Demand for dental products in China is expected to climb 11.0 percent per year through 2012 to ¥21.5 billion, driven by the increasing number of Chinese who are using dental products to improve their appearance and the growing popularity of professional dental care. Rising personal income levels will make dental products more affordable to consumers while government programs will increase awareness of the benefits of good oral care.

Growth in professional market to outpace larger consumer market

Consumer dental products -- including toothpaste, whitening products, dental rinses and mouthwash, dental floss, and denture products -- account for about three-quarters of overall Chinese dental product demand. Toothpaste dominates the consumer dental product segment. However, the fastest growth is forecast in lower volume products, especially floss, whitening products and dentures, with sales of each rising more than 15 percent per year through 2012. In particular, teenagers and college students, who cannot afford professional whitening treatments, will drive sales of consumer whitening products. Floss and dentures will benefit from increasing oral care awareness.

Professional dental product demand in China will outpace consumer dental product advances. Market gains will be spurred by an increasing number of dental visits per year, as well as a shift from functional, and repair and restorative products to cosmetic procedures using more aesthetic material. In particular, individuals who have stained teeth are increasingly likely to undergo procedures such as the application of ceramic veneers. Cosmetic procedures are becoming increasingly important to dental professionals in China, as these treatments are proving popular among consumers and can be highly profitable for dental service providers. In addition, as income levels rise, more people in China are able to afford orthodontic products, which will boost professional dental product demand through 2012. Among repair and restorative products, ceramic crowns and bridges will achieve the fastest growth. Moreover, an increase in overall dental visits and rising demand for a range of dental procedures are leading to growth in the number of dental clinics in China.

Huge China market attracts foreign companies

The huge potential of the Chinese market for dental products has attracted a variety of foreign companies and, unlike in many industries in China, these companies have garnered a sizeable share of the domestic market. Colgate-Palmolive and Procter & Gamble were the top providers of dental products in China in 2007, followed by Unilever Group, Masson Group, Guangxi Aoqili and Tianjin Lantian Group.
Sample Text, Table & Chart

PRODUCTS

Consumer Whitening Products

In 2007, whitening products accounted for almost three percent of total consumer dental product demand in China. This segment encompasses those products designed to lighten tooth shades, including gels and liquids. Toothpastes that contain whitening agents are also included in the toothpaste segment.

Demand for consumer whitening products is forecast to increase 15.8 percent per year to ¥520 million in 2012, with unit sales of 25 million. Demand will be driven by increasing disposable personal incomes and new product promotions. In addition, celebrity endorsements, which promote tooth whitening products through cosmetic books, written by well-known personalities, will continue to play a role. However, demand for whitening products will be restrained by sales of toothpastes incorporating whitening ingredients.

Consumer dental whitening is a relatively new product segment in China, which only emerged on a significant scale in the early 2000s. Between 2002 and 2007, these products quickly established a presence in the Chinese dental product marketplace. In recent years, competition in this subsegment has significantly increased as more companies entered the market. For instance, greater penetration of the Chinese market by smaller domestic whitening product companies has limited aggregate gains since these firms’ items are generally priced lower than name brands. The entry of more foreign brands has also contributed to fast growth in whitening products in China.

Going forward, there remain opportunities for whitening product suppliers in China as there is a growing segment of the population that is interested in aesthetic products that maintain or bring about whiter teeth. The easy accessibility and relatively low cost (in comparison to professional whitening products) of these products will also help to drive growth.
Guangxi Aoqili Company Limited
28 Xitier Road
Wuzhou, Guangxi 543002
China
86-774-386-3770
http://www.aoqili.cn

Annual Sales: ¥760 million [US$100 million] (estimated)
Employment: 1,000 (estimated)
Key Products: herbal toothpastes and mouthwashes

International Contact: Jianzhao Li, Sales Manager, 86-774-382-7188

Guangxi Aoqili is a manufacturer of oral care, personal care, fabric care and household chemical products. The state-owned company operates nine production centers, approximately 20 supply bases and ten warehouse/distribution facilities throughout China. Guangxi Aoqili was the fifth largest supplier of dental products to the Chinese market in 2007, with ¥450 million in dental product revenues, accounting for 3.5 percent of total industry sales.

The Company participates in the Chinese dental products industry mainly through the production of herbal toothpastes sold under TIANQI and K-CLEAN brand names. TIANQI toothpastes include fluoride-free gingko cavity protection, coptidis and aloe herbal gum care, borneol ice-cool, licorice-flavored and children’s types. Other TIANQI toothpastes include medicated toothpastes, among them a phenol-formulated type for sensitive gums, a chlorophyll-formulated type for treating bad breath, and a toothpaste that is designed to reduce gum inflammation and help treat oral ulcers. The K-CLEAN product range comprises medicated herbal toothpastes, including types that are...
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