

1st Edition

# Professional Oral Care USA

Published October 2013  
Base Year: 2013  
Forecasts to 2018

Regional Coverage: ■ United States

This report provides a comprehensive assessment of the U.S. market for professional oral care products used and sold to consumers through dental professional offices. The findings of the study are based on a combination of structured surveys with dental professionals, as well as in-depth interviews conducted by Kline's experts with manufacturers, marketers, trade associations, and others knowledgeable on the industry. This report focuses on key trends, developments, challenges, business opportunities, new technologies, and new product activity.

## This Report Will Help Subscribers Understand:

- Market size and growth
- Sales of leading companies and brands
- In-office vs. take-home use of professional oral care products
- Dental professionals' perceptions of professional oral care services and products
- Dental professionals' interests and unmet needs
- Market forecasts and expected future trends



# Report Contents

## Introduction

### Executive Summary

An executive briefing covering market developments, the impact of key trends and issues in the professional oral care market, and future implications for industry players.

### Dental Professional Research

Summarizes results of structured surveys conducted with dental professionals including general dentists, family dentists, cosmetic dentists, and dental hygienists.

## Market Analysis

Provides insightful analysis of the therapeutic indications shown in Table 1 and the brands shown in Table 2, including category trends and developments, brand sales, market shares, assessment of new product activity and new technologies, and future outlook.

## Company Profiles

Provides brief profiles of the companies listed in Table 2 including information on professional oral care products, corporate sales and profits (where available), recent developments including mergers, acquisitions, divestitures, new product launches, marketing strategy, and outlook.

Table 1: Therapeutic Indications

Caries

Periodontal/gum health

Sensitivity

Whitening

Table 2: Companies and Brands

Company	Brand(s)
3M ESPE	Clinpro 5,000, Peridex
Church & Dwight	Arm & Hammer, Spinbrush
Colgate-Palmolive	Colgate, Phos-Flur, Periogard, Prevident
DenTek	DenTek
Dentsply International	Nupro Sensodyne
Dr. Fresh	Reach manual toothbrushes
Evolve Dental Technologies	Kor Whitening
GC America	MI Paste
GlaxoSmithKline	Aquafresh, Biotene, Sensodyne
Groman Dental	Prophy Master
Johnson & Johnson	Listerine, Reach floss
Oral Bio Tech	CariFree
Perio Protect	Perio Protect
PerioSciences	AO Provantage
Philips	Zoom, Sonicare, Fluoridex, Brite Smile Discus
Procter & Gamble	Crest, Oral B
Sunstar Americas	GUM alcohol-free chlorhexidine gluconate
Syneron	Ionic Pearl
Ultradent	Opalescence, Xylishield
Vident	Vitashade
WaterPik	WaterPik fluoride





## Scope

Professional Oral Care USA is an extensive industry resource to be used by marketing and other executives in the professional oral care market for competitive analysis, market investigation, business planning, and understanding dental professionals' interests, needs, and perceptions of professional oral care products.

- Provides a combination of dental professionals' insights as well as market size and trend data from interviews with marketers and distributors
- Covers four therapeutic indications including:
  - Caries
  - Periodontal/gum health
  - Sensitivity
  - Whitening
- Includes in-office versus take-home use
- Excludes consumer oral care products sold at mass retail outlets, such as drug stores, mass merchandisers, food stores, warehouse clubs, online, and other retail outlets

## Key Benefits

Subscribers to Professional Oral Care USA are afforded the following benefits:

- Access to a comprehensive, independent source of information and insights on the U.S. professional oral care market
- Access to accurate sales data through professional outlets based on primary research with knowledgeable industry participants
- A source of valuable competitive information and intelligence
- Identify potential acquisition candidates in the professional oral care market
- Understand key industry trends that may impact your categories/brands
- Learn first-hand insights from dental professionals about your categories/brands
- Discover dental professionals' unmet needs for professional oral care products
- Charter subscribers will be given the opportunity to review and provide input on dental professional survey before it is fielded
- Gain knowledge on expected future trends, new technologies, and market forecasts

## Methodology

Kline's approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 50-plus years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives.

### Primary Research

#### We Know Who to Talk to. We Know How to Listen.



A high number of in-depth discussions are conducted by each analyst. All interviews are done with true industry insiders.

Kline's analysts draw upon pragmatic experience to understand global impacts and local perspectives. Our interviews engage experts across all pertinent fields and sectors including:

- Dental professionals
- Trade organizations
- Suppliers
- Distributors
- Marketers/manufacturers
- Retailers

### Secondary Research

#### We Know Where to Look - Mining the Details.



Analysis is further supplemented by secondary research, consisting of constant tracking of annual company reports, national statistics bureaus, trade/industrial/professional associations, and the like.

Relevant developments are diligently followed and their impact closely monitored. Reports also draw upon non-confidential data from Kline's internal database, consisting of over half a century's syndicated research.

### Comprehensive Market Intelligence

#### We Know How to Verify.



Data are rigorously analyzed, cross-checked, distilled and validated. Kline's proven methodology allows exceptionally effective, precise and reliable market

intelligence procurement and assessment, giving subscribers a solid foundation on which to grow, refine, and expand their business with confidence.

## Kline Credentials

Kline is a leading global management consulting and market research firm offering the complete spectrum of services. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for over 50 years.

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