



SUSTAINABILITY OF ORAL CARE INDUSTRY IN INDIA -
TRADITION TO TRADE ITION

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ABSTRACT:

Ayurveda has two major aims i.e. *Swasthya Samrakshana* (Preventive) and *Atura Vikara Prashamana* (Curative). Among eight branches of *Ayurveda*, *Shalaky Tantra* deals with the treatment of ailments affecting eyes, ears, nose, mouth, throat etc. Earlier *Danta Pavana* (Chewing plant stick), *Churna*, *Pratisarana* (applying paste) and oil were used for preventive and curative purpose. Now the awareness regarding oral hygiene, different brands of oral care products like toothpaste, gel, mouth washes, teeth whitening products etc, are available in the market. Today, Oral care industry has a plethora of herbal toothpaste brands like Colgate, Dabur, Proctor and gamble, Hindustan Ltd., Himalaya, Vicco recently Patanjali adding to the list. India's oral care market is quantified at 7000 crores presently and growing with a CAGR of 11.4% from last five years substantially. Oral care has a projected forecast period constant 2015 price value CAGR of 8% with sales expected to reach INR 150 bl by 2020.

Keywords: Oral care, Ayurveda, current market trade, CAGR, Toothpaste market share

INTRODUCTION: *Ayurveda* is the oldest medical science, existing before the human creation. It is aimed to protect the health by giving the knowledge of preventive health principles and cure the diseases by explaining the different types of treatment-procedures and principles.¹ So, our *Acharyas* have emphasized first to maintain personal, oral etc. hygiene by following *Dincharya* (daily regimen), *Ritucharya* (seasonal regimen) and *Ratricharya* (night regimen) for a healthy life. Under these preventive health principles, oral hygiene has vital role in our life and is the practice of keeping the mouth and teeth clean for dental health and to avoid bad breath. Dentistry is important branch covered under *Shalaky Tantra* of eight branches of *Ayurveda*.² Separate chapter for diseases related with poor oral hygiene under the

head *Mukha Roga* which can affect eight areas of mouth – *Oshta*(lips), *Ganda* (cheeks), *Dwija* (dental), *Moola* (gums), *Jihwa* (tongue), *Talu* (palate), *Galam*(throat) and *Sarvasya* (oral mucosa and related structures).³ A variety of rudimentary techniques and formulations were used like chewing sticks, tree twigs, tooth powder and mouth rinses for oral hygiene in our classics.

Due to increase in standard of living and changing lifestyle, the demand for specialized oral care products like multipurpose toothpaste, prestige toothbrush, mouthwash, etc are greater than ever, thereby providing high momentum to the Indian oral care market. The wealthy class requires the premium and value added oral care products in order to maintain oral hygiene and they use multipurpose oral care products such as

mouthwash, dental floss and other specialized oral care products to keep fresh breath and mouth. So, these technological improvements of the oral care industry and market competition, wide range of oral care products is available in the market. An increase in the consumption of oral care products has been observed in the last decades.

MATERIALS AND METHODS: Since ancient times, our *Acharyas* were concerned about cleaning the teeth and keeping mouth fresh and healthy. For that a variety of oral hygiene measures has been mentioned as follows:

Oral care in Ayurveda: *Ayurveda* has mentioned various techniques for oral care i.e *DantaDhavana* (chewing plant stick), *DantaShodhana* powder (gum massage powders) and *Gandoosha* (gargles) under *DantaRaksha* as a part of *Dincharya*. *Vagbhata* had mentioned detailed description of these oral techniques with its types, liquid media used for procedure, indications and contra indications.⁴

DantaDhavana (Tooth brushing by chewing plant stick): ‘*DantaDhavana*’ word is being used for teeth cleaning by our *Acharya*.⁵ Cleaning of teeth should be done in the morning and after eating⁶ while *AcharyaCharaka* has mentioned tooth brushing in two times⁷ by *DantaPavana* (chewing stick which is 12 fingers long and made of fresh twig from a plant).⁸ Considering *Ritu*, *Dosha*, *Rasa* and *Virya*, different taste of chewing sticks have been mentioned to use. *Nimba* stick is the best among bitters, *Khadira* among astringent, *Madhuka* among sweets and *Karanja* is the best among pungents.⁹ Tooth brushing is contraindicated in some extreme conditions like *Gala* (throat disorder), *Talu* (Palate), *Ostha* (lip) *Jihva* (tongue),

Mukhapaka (Stomatitis), *Shwasa*, *Kasa*, *Hikka* *Vamana*(vomiting), Debility, *Ajirna*, *Murcha* (fainting), narcosis, headache, thirst, tiredness, exhaustion by drinking, facial paralysis, *Karna shoola*, *Danta roga*.¹⁰

DantaShodhanapowder (Gum massage):

It is indicated after brushing. After cleaning the teeth, the gums are cleaned without hurting them by rubbing with Powder of *Tejovati* mixed with honey, *Trikatu*, oil and *Saindhava* for daily cleaning teeth.¹¹ It relieves from *Daurgandhata* and *Mala-Kapha* and increase appetite.

Gandoosha(gargling): It is medicated oil or liquid filled in the mouth of that quantity which cannot be moved, held for a specific period until there is lacrimation and nasal discharge and then the patient spits it out.¹² *Gandoosha* of *TilaTaila* is also used for various teeth disorders.¹³ It is useful in conditions as abnormal taste, foul smell, swelling and stiffness of mouth, provides cheerfulness, firmness to teeth and relish.¹⁴

Kavala (gargling): *Kavala* is a medicated oil or liquid filled in the mouth of that quantity which can be moved.¹⁵

Pratisarana: Local application of drugs to the interior of mouth with the finger is known as *Pratisarana*.¹⁶ This definition limits the use of *Pratisarana* only for *Mukharoga* but *AcharyaSushruta* had described it as one of the *Upakrama* of *Vrana*.¹⁷ It is also known as *Avachurnan*¹⁸, *Lepa*¹⁹ and *Gharshana*.²⁰

Oral care market in India: The early history and evolution in oral care from chewing sticks to toothbrushing by tooth paste began as long ago as 300-500 BC in China and India. First attempts at tooth cleaning included using abrasives such as crushed bone, crushed egg and oyster

shells.²¹ Tooth powder was the first noticeable advance, and was made up of elements like powdered charcoal, powdered bark, salt and some flavouring agents.²² So, as a part of evolutions, the traditional teeth cleaning measures have been develop into tooth paste, mouth wash and other many more variety of oral products.

Owing to the wide variety of products available in the marketplace and the strong appeal to consumers exerted by the cosmetic industry, the consumption of oral care products has in oral care increased in the last decades. In the following section, the changes in the consumption of oral health products and their main reasons are discussed.

India Oral Care Market is growing with a CAGR of 11.4% from last five years and is projected to get more than double by the year 2021 due to rising oral care, brand awareness, increasing disposable income, growing demand in middle class people and affordable price of oral care products in the form of mass oral care products.²³

Indian oral care market is segmented into five categories such as toothpaste, toothbrush, toothpowder, mouthwash and other oral care products that include dental floss, oral care chewing gum, etc. Colgate-Palmolive India, HUL and Dabur are market leaders in the organized oral care market. Toothpaste segment dominate the oral care market along with its various variants. Colgate-Palmolive India is leading in toothpaste category from many decades with 57% market share followed by Hindustan Lever's Pepsodent with Dabur at number three. 55% of the Indian population uses toothpaste and less than 15 % of the Indian toothpaste users brush twice a day, only indicating that

the market here remains largely untapped.²⁴

Oral care has a projected forecast period constant 2015 price value CAGR of 8%, with sales expected to reach INR150 billion by 2020. Over the forecast period, growth will be fuelled by premiumisation at the top end of the market as well as the entry of new consumers in the mass market and the shift away from traditional products to organised oral care products.²⁵

DISCUSSION: Acharyas explain Oral hygiene is the practice of keeping the mouth and teeth clean for dental health and to avoid bad breath. Tooth brushing, gum massaging and gargling are main techniques for oral hygiene. Present-day research has shown that all the chewing sticks described in ancient *Avurveda* texts (Circa 200 BC) have medicinal and anti-cariogenic properties.²⁶ The exploration of botanicals used in traditional medicine, may lead to the development of novel preventive or therapeutic strategies for oral health.²⁷ Oral care has become a thrilling legroom for new product developments and producers are trying to convince consumers through aggressive campaign and advertising that they should adopt oral care products to improve oral hygiene and to be protected from dental related issues.

The Indian oral care market is presently estimated at Rs. 7000 crores, of which toothpaste contributes the largest chunk, accounting for approximately 75% of the total market. The toothpaste market share in 2012, 2013, 2014 and 2015 are shown in Figure 1.1, 1.2, 1.3 and 1.4 respectively. It indicates that Colgate is leading company in oral care market.

The market has been greatly driven by innovation, retail availability, packaging and promotion. It is moving towards natural/herbal products as Colgate has

launched products with Neem, Charcoal and Active Salt etc. in its products also mouth wash gargles, gels etc. time to time. Therefore Colgate is leading brand in oral care.

Dabur has presence in herbal segment in toothpastes with Babool in economy segment, Dabur Red in mass segment and Meswak in the mid premium segment. The company drives Rs. 7.5billion sales from oral care and toothpaste accounts for 80% of this. Dabur has grown toothpaste sales by 15% CAGR and has steadily gained market share in the segment. Now, Dabur faces rising competition from Himalaya and Patanjali, given their reputation in herbal products. It has also started advertising Meswak to compete with Patanjali's Dantakanti brand in this segment. Till people demand tradition mode of oral care products in their daily use.

After seeing all these data and reports of leading brands in oral care, people use salt, chewing sticks, local oral care brands like monkey brand black powder etc. but now a day, leading oral care brands like Colgate, Dabur, Himalaya, Patanjali, Vicco etc. promote their products according to the market demand and provide to each people different tools of advertising.

CONCLUSION: This review literature reports the history and the current market of oral care products. It provides information extending from the products used by our ancestors to those currently available, as well as on the changes in the supply and consumption of these products. Although the scientific knowledge about oral diseases has improved greatly in recent years, our ancestors had already been concerned with cleaning their teeth. Due to increase in standard of living and changing lifestyle, the demand for

specialized oral care products like multipurpose toothpaste, prestige toothbrush, mouthwash, etc are greater than ever, thereby providing high momentum to the Indian oral care market. A multipurpose oral care product is an emerging trend in the industry. However, the penetration of modern oral care products is low, but this opens the door for new and enormous opportunities in Indian oral care industry.

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Figures:

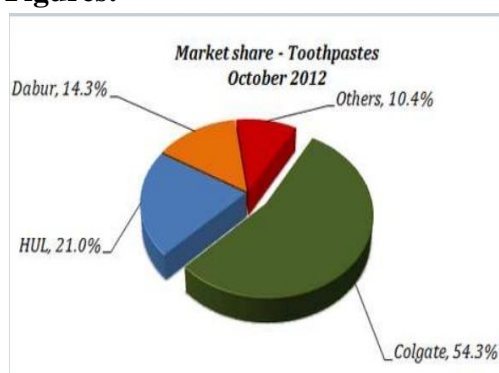


Fig. 1.1

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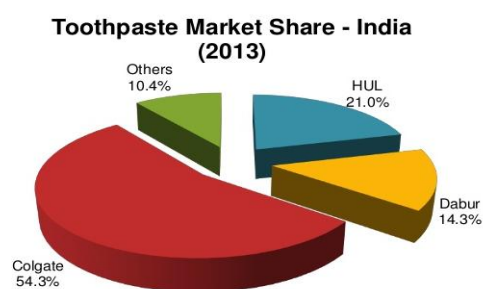


Fig. 1.2

Market share (2014)



Fig. 1.3

Market share - Toothpastes April 2015

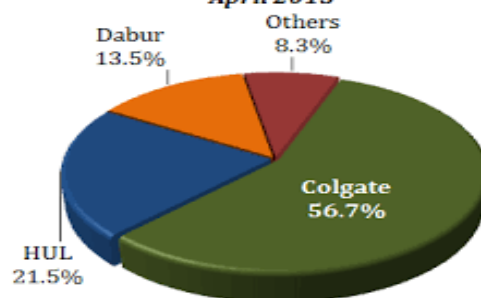


Fig. 1.4