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### Down in The Mouth

Despite an array of new product launches, oral care sales actually fell in 2005.

**Ava Caridad**  
 Associate Editor

What was hot and what was not in the 2005 oral care market? For starters, Church & Dwight purchased the SpinBrush toothbrush business from Procter & Gamble, which acquired the Oral B business when P&G acquired Gillette, which caused quite a spin all around. Mergers and acquisitions aside, with the exception of toothbrushes and dental floss, sales for dental care products were down in 2005, according to Euromonitor International, Chicago, IL. Sales for all oral hygiene products slipped a bit from \$4.64 billion in 2004 to \$4.61 billion in 2005.

Euromonitor further predicted that the mature oral hygiene category would decline 0.7% in value sales in 2005. This will largely result from 2005 declines in what were the two best performing oral hygiene subsectors 1997-2005; mouth fresheners and tooth whiteners grew 274.4% and 596%, respectively, in current value terms from 2000 to 2005. These same subsectors declined 8.3% and 23%, respectively, in current value terms during 2005.

So what piqued consumer interest? Plenty of new flavors for toothpaste, brushes that do a lot more than brush, and rinses that whiten in addition to refreshing the mouth.



Rev! whitening systems include Arm & Hammer toothpaste in every kit.

Mike Kernish, Crest toothpaste brand manager, believes that products that offer extreme performance are desirable. "Nowadays, consumers don't just want to avoid cavities, they want a healthy, beautiful smile for life. I think that the products and ingredients generating the most excitement today are those that make the oral care experience more enjoyable."

Tom's of Maine's director of professional advocacy, Dr. Kerry Maguire, insists that multi-benefit products—those delivering both effective health and aesthetic benefits—are a major focus for both consumers and manufacturers. In addition, emerging research linking oral health and overall health is putting more emphasis on oral practices and products that promote optimal health.

Bruce Tetreault, product manager, Arm & Hammer and Mentadent brands, Church & Dwight Premium Oral Care opines that today's consumer is simply overwhelmed with the product

choices out there, so they are looking for one product that does it all—cleaning, cavity and gum protection, whitening, enamel restoration and breath control.

"It's all about offering simplicity and convenience in one package that fits easily into their daily lifestyle," he said.

And while Brett Mize, regional sales manager, Dr. Fresh, Inc. insists consumers increasingly want

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valuable products for less, Teresa Panas, manager, marketing communications, Pfizer Consumer Healthcare, stated that consumers look for products that are proven and have scientific evidence to back up product claims.

"In recent years, innovation has been a key to bringing new users into the category. Consumers prefer to have a variety of options, so that they can choose the product that is right for them or suits their needs, she said.

### Taste that Paste

As a result of competition from multi-purpose toothpastes, traditional toothpastes, including those that offer whitening, tartar and cavity control or breath freshening have been declining in sales, states Euromonitor International. Toothpaste sales in general fell just below \$2 billion in 2005 from just above \$2 billion in 2004.

It's no surprise then that marketers have opted to promote more new toothpastes in bold flavors to spark consumer interest. Mint will always be a popular choice, but variations on the minty theme, as well as complete departures, are what's being offered this year.

"Until recently, you could get any flavor toothpaste you wanted, as long as it was mint," observed Mr. Kernish. "But consumers told us they wanted more choices."

According to Tony Mugnos, president and chief executive officer of Paglieri Mugnos, USA, the oral care market has become more segmented over the past few years. It has separated into clearly defined subdivisions that reflect the mood of the moment. Paglieri Mugnos, USA, introduced Fructodent Gourmet toothpastes, a line of natural flavored oral care products. Developed by a team of oral experts in Milan, Italy, the patented formulas are rich in natural extracts and active ingredients, and were specifically created to address consumer needs, from cavity protection to whitening action for smokers, and tea and coffee drinkers. Fructodent contains no aggressive substances that could damage tooth enamel or gums, stated the company.



Listerine Pocket Mists deliver a burst of mint or citrus freshness on the go.

"Fructodent delivers a delicious experience with every brushing for adults and youngsters alike. There is a Fructodent formula for everyone, offering superior quality at affordable prices," explained Mr. Mugnos. "By launching these exciting new flavors combined with specific formulas for oral care, we're starting an important trend in the gourmet category."

The 3.4oz. Fructodent toothpaste stand-up dispenser is highly decorative, colorful and assures a strong shelf presence for the brand. It features a valve closure that allows for controlled flow and helps prevent product build-up.

The line of dental formulas retailing at \$2.99 include Green Apple Cavity Protection gel, Orange & Lemon Tartar Control toothpaste with vitamin C, Mint & Chocolate Total Protection gel, Mint & Strawberry Plaque Prevention gel, Eucalyptus, Aniseed & Licorice Breath Freshening gel and Lemon & Sage Whitening toothpaste with vitamin C. The Mint & Licorice Whitening toothpaste for smokers with vitamin C and Vanilla Whitening toothpaste for tea and coffee drinkers with vitamin C retail for \$3.49.

Procter & Gamble launched the newest addition to Crest Whitening Expressions family of flavors with Lemon Ice. According to Matt Barresi, P&G associate director of marketing, North America Oral Care, "Lemon brings refreshment, happiness and cleansing to our minds. Using this tried and true flavor in a cool, icy toothpaste seemed like a great way to update it." Lemon Ice retails for \$2.99 for a 6.0oz. paste or 4.6oz. liquid gel.

Tom's of Maine marked its 35th anniversary by introducing Whole Care toothpaste, a line that uses natural flavor oils such as cinnamon-clove, orange-mango, spearmint, winter mint and peppermint.

"Our chemists, microbiologists, herbalists, medicinal plant scientists and oral health professionals have done a tremendous job creating Whole Care using the latest science of plants and minerals," said Tom's of Maine cofounder Tom Chappell. "Whole Care delivers great flavor, cavity prevention, tartar control, and whitening using natural ingredients."

Additionally, Tom's of Maine Natural Goofy Grape Anticavity Children's toothpaste earned the ADA Seal of Acceptance. It is flavored with real grape extracts and claims to be the only natural brand, free of artificial ingredients and sweeteners, to carry the ADA Seal on its fluoride toothpastes.

Also for children is the new Kids Colgate 2-in-1 toothpaste and mouthwash in bubble gum flavor. Colgate-Palmolive also launched a new toothpaste in mild bubble fruit flavor featuring everyone's favorite adventuress, animated television heroine Dora the Explorer.

### No More Boring Brushes

For years, toothbrushes looked the same and worked the same, the only choice being which of the three primary colors to select and whether to go for soft or firm bristles. Children's toothbrushes were little more than clumsy miniature adult brushes decorated with a generic cartoon decal. But after the decal flaked off, brushing lost its appeal once again.



Pagliari Mugnos, USA offers gourmet toothpastes in a variety of flavors and formulas.

But a generation ago, Johnson & Johnson introduced the peculiarly ergonomic Reach toothbrush. With a tilted head for getting to back teeth and a wider variety of colors, it opened the floodgates for inventive design and innovative thinking about toothbrushes.

No longer a bland drug store purchase, marketers now compete aggressively to create the latest and greatest in oral care implements. And it's working. Euromonitor International reports that manual toothbrush sales are up from \$652 million in 2004 to almost \$674 million in 2005. Meanwhile, power toothbrush sales surged more than 7% to over \$872 million.

New this year are brushes heavy with devices to help keep the mouth clean and fresh. Baltimore, MD-based Breath Blaster LLC introduced the Breath Blaster, a patented oral hygiene device that scrubs away odor-causing bacteria found in the mouth, leaving breath minty fresh for hours. The unit is operated by removing the cover from the base and attaching it to the bottom to form a full-sized toothbrush. Once the upper unit's blue button is pressed, a pre-measured amount of the specially formulated mouthwash contained inside the Breath Blaster is atomized into a fine mist-like spray that is propelled onto the bristles of the brush. The unit is now ready for normal brushing. According to company executives, the specially formulated mouthwash, combined with effective brushing action, thoroughly scrubs away the odor-causing bacteria inside of the mouth and on the gums, cheeks and tongue without requiring the expelling of any excess liquid or rinsing. Each unit is designed to allow 20-25 uses before disposing. The bristles have been treated with a chlorhexidine coating that the company states has been proven to inhibit bacterial growth, providing continuous bristle protection.

The Breath Blaster is designed to be used on-the-go without the need to carry a toothbrush and toothpaste, nor does it require access to running water or a sink to rinse in. The 3.5" self-contained unit can easily be stored in a desk drawer, car, briefcase, purse or even in a shirt or pants pocket.

In addition to the disposable model, an "executive" model is currently being designed that will have replaceable brush tips and replaceable/refillable mouthwash cartridges. The replaceable brush tips will be available in soft, medium and firm bristles with compact, medium and full brush-head sizes. The replaceable cartridges will be offered in a variety of different flavors, and the refillable cartridges will allow users to refill the cartridges with any mouthwash.

Studies reveal that only 11% of consumers floss their teeth. Dr. Fresh Inc., Buena Park, CA, has set out to change that statistic with the Flosh, dental floss housed in the base of a toothbrush. The Flosh aims to make flossing as convenient as brushing, eliminating excuses for forgetting to floss.

The Flosh's soft bristles are specially created to massage the gums while getting deep into the crevices of each individual tooth, helping to reduce plaque build-up. When brushing is finished, the Flosh makes it

simple to grab some floss from the base of the toothbrush to ensure that teeth and gums are clean and healthy. It retails for \$2.49.

“I find that flossing is the most challenging oral care task for my patients, in terms of consistency,” states Dr. Steven J. Brattesani of San Francisco, CA. “Recommending the Floss is much more effective than chiding them for not flossing or warning them about the potential damage to teeth and gums. The convenience factor is the key to compliance.”

The tongue harbors many of the bacteria that live in the mouth and contribute to bad breath. According to a survey commissioned by Colgate Palmolive, 87% of U.S. adults say tongue cleanliness contributes a lot or somewhat to having bad breath, yet only 51% say cleaning the tongue is a significant part of their daily brushing routine.

The new Colgate 360° has a built-in tongue cleaner designed for gentle and effective removal of bad breath bacteria. It has a raised cleaning tip designed to clean the back teeth, tapered bristles to clean deep in-between teeth and along the gum line and polishing cups to help remove stains and whiten teeth.

According to Michael Sload, vice president and general manager, Colgate-Palmolive U.S. Oral Care, the tongue cleaner removes up to 96% more bad breath bacteria than brushing teeth alone with an ordinary manual toothbrush.

“In addition, the special bristle configuration is proven to reduce interproximal plaque and gingival bleeding.”

According to the same Colgate survey, 45% of adults brush their teeth for one minute or less each time they brush, while only 43% brush their teeth for the recommended two minutes or more each time. Dr. Fresh has attempted to make brushers time-conscious by introducing the Fire Fly line of toothbrushes for kids and adults.

The Fire Fly is a bright, sparkly, ergonomic children’s toothbrush that lights up and flashes for one minute intervals to inspire longer brushing; an Easy Touch feature lets small hands activate the light.

According to Dr. Fresh, few kids, or even parents, realize that two minutes of brushing—one minute each on the uppers and lowers—are required for thorough cleansing. Most people brush for 35 seconds or less, but think they are brushing longer. The soft bristle Fire Fly contains an LCD light that incorporates “blinking technology,” flashing for 60-seconds when pressed at the base. Retailing for \$.98 or \$1.98 for a two-pack, it’s specifically designed for 200 usages and is available in an assortment of sparkly translucent colors such as clear, blue, green, pink and red. The Float’n Fire Fly toothbrush also flashes for one minute and contains a favorite cartoon character floating in the base. It retails for \$2.99. The Fire Fly toothbrush for adults retails in \$2.49 and comes in pink, red, blue, green and clear.

### The White Stuff

Research groups contacted by happi agree that sales of whiteners dropped in 2005. Information Resources, Inc. reported an overall decline of 16% in dollar sales, while Euromonitor International indicated that dollar sales for whiteners plummeted to \$331 million, down from almost \$430 million in 2004.

However, Bruce Tetreault, Church & Dwight Premium Oral Care, insisted pearly whites are still in demand.

“Whitening has become a truly required benefit for consumers, as evidenced by the fact that basically all new toothpaste items carry a whitening benefit. In the dental professional community, it has been interesting to see dentists shift from offering primarily functional (drill-and-fill) services to now offering an array of cosmetic options.”



Fire Fly toothbrushes from Dr. Fresh light up to let users know how long to brush for optimal cleaning.



Crest's Vivid White Night toothpaste is designed exclusively for bedtime brushing.

Julie Charlestein, director of product branding at Premier Dental Products Co., Plymouth Meeting, PA, agrees aesthetics continue to be strong, specifically with restorations and whitening.

"Over the past five years we have seen an explosion in tooth whitening, both at the dentist and through OTC products," she said. "According to Dental Products Report, one of the top 10 products for 2005 was Premier Dental's Rev! hydrogen peroxide whitening agent requiring just 15 minutes of wear time once a day."

And at-home products aren't the only solution.

"The largest growth in the whitening category is in in-office whitening," Ms. Charlestein explained. "In the professional market place, remineralization is very exciting. Naturally, and through various eating habits, our teeth are demineralized and depleted of calcium. With remineralizing agents such as amorphous calcium phosphate (ACP), teeth are remineralized and strengthened. ACP makes teeth resistant to the loss of tooth enamel and gives them increased luster for stronger healthier smiles." This new technology can be found in Premier Dental's Enamel Pro professional prophylaxis paste, available from dentists in April.

Enamel care is indeed a burgeoning trend, as liquid calcium makes its way into several new over-the-counter whiteners. Over time, acids from food and drink form tiny crevices in the surface enamel of teeth where plaque and stains can collect. Church and Dwight's Arm and Hammer Enamel Care with Liquid Calcium and Arm and Hammer Enamel Care with Liquid Calcium Breathe Defense combines the cavity protection of fluoride, the gentleness of baking soda and liquid calcium technology to help restore surface enamel luster by filling in tooth surface crevices. Both products retail for \$3.49 for one 4.3oz. tube

This spring, Mentadent, also from Church and Dwight, will unveil Replenishing White, a fluoride toothpaste with anti-aging liquid calcium technology in a peppermint fusion flavor that helps to restore tooth surface enamel to whiten teeth and prevent future stains.

"People are very concerned with how aging affects their appearance, from gray hair to wrinkles, but many overlook the aging process that can dull and stain their teeth," said Dr. Dennis Wells, an expert in aesthetic dentistry who has been featured on ABC's Extreme Makeover. When surface enamel is lost, the tooth surface can roughen, lose its shiny appearance and become dull. These surface irregularities can also attract plaque and other particles that can eventually lead to stains that are difficult to remove.

Mentadent Replenishing White's patented pump keeps calcium and phosphate, the natural building blocks of tooth enamel, separate. When used, the ingredients combine to form liquid calcium, which fills in the tiny, rough irregularities in surface enamel to whiten teeth and help prevent future stains. The suggested retail value is \$3.49 for a 3.5oz. pump or a 5.2oz. refill cartridge.

According to P&G's Crest, Americans spent approximately \$44 billion on anti-aging products and procedures in 2005. Many people are looking for ways to maintain a youthful appearance, yet not everyone can afford the expensive procedures currently on the market. Crest Whitestrips introduced a new product in its line up—Crest Whitestrips Renewal—its first foray into the anti-aging arena and a low-cost alternative to some costlier anti-aging products. The new product uses Crest Whitestrips' patented strip technology that contains a specially formulated whitening gel. Whitestrips Renewal retails for \$39.99 per kit.

Also new from Crest is Vivid White Night toothpaste, which claims to work while you sleep to reduce surface stains by up to 85% in 14 nights. The formula contains special silica to gently polish teeth and micro-cleansing whiteners to loosen surface stains during the night, making them easier to brush away in the morning. It comes in 4.1oz. tubes of Moonlight Mint or Revitalizing Mint flavor at a suggested retail price of \$3.99. Crest's Mr. Kernish adds "Five years ago, if you wanted dramatically whiter teeth, you had to pay hundreds of dollars for a professional whitening treatment."

Colgate-Palmolive introduced Colgate Luminous, a premium toothpaste containing a fluoride



C.O. Bigelow's concentrated mouthwash comes in an old fashioned glass bottle.

mineral formula to help strengthen enamel, brighten teeth and enhance their natural shine. To make teeth look younger, Colgate Luminous safely lifts off yellowing stains and reinforces enamel layers by rebuilding weak spots on teeth. It comes in three flavors, Crystal Clean Mint, Paradise Fresh and Cinnamon. It also has attractive packaging for an upscale look that is distinguishable on store shelves, featuring an eye-catching diamond icon, vibrant colors and a scratch-and-sniff sticker for each flavor. The tube has a patented valve closure that enhances flow control and prevents clogging for easy dispensing. A 6oz. tube retails for \$2.99.

According to a survey published by Pfizer's Listerine brand, 50% of consumers have tried a whitening product and half of those who have used a whitening product have tried two to three different kinds. According to the study, consumers are weary of current whitening methods that are too time-consuming, messy and complicated, and nearly nine in 10 Americans surveyed would appreciate a teeth-whitening product that also kills germs that cause bad breath. Further, the study revealed that 79% of Americans surveyed think white teeth make people look healthy and 50% say they would feel more confident with whiter teeth. With this in mind, Listerine launched Whitening Pre-Brush Rinse, an easy way to whiten teeth while killing the germs that cause bad breath.

"Listerine Whitening Pre-Brush Rinse meets the needs of consumers who want a convenient and efficacious way to whiten teeth and get fresh breath, without interrupting their daily routines," said Christine Charles, associate director, oral care R&D, Pfizer Consumer Healthcare.

The foaming action works to penetrate stains with a quick, 60-second rinse, twice a day before brushing. In a clinical study, Whitening Pre-Brush Rinse provided whitening results in 12 weeks. Retailing for \$5.49 for the 16oz. bottle and \$7.49 for the 32oz. bottle, it contains 2% hydrogen peroxide and uses foaming action to safely whiten teeth.

### Rinse and Spit, Please...

Rinsing is becoming a bigger part of the oral care regimen, and according to Euromonitor International, mouthwash and rinse sales rose in 2005 to over \$826 million from \$757 million in 2004.

Last year, Crest introduced its first mouthwash, Crest Pro-Health rinse. It provides the same types of oral health benefits as leading mouthwashes and, according to P&G, kills 99% of common germs that can cause plaque, gingivitis and bad breath—all without the burn of alcohol. The new therapeutic rinse contains cetylpyridinium chloride (CPC) to help fight bad breath germs, appeals to consumers who prefer alcohol-free products and is suitable for use by the whole family (kids ages six and up).



Mentadent's Replenishing White toothpaste uses liquid calcium technology to whiten.

"Crest's first mouthwash provides consumers with an alcohol-free formula that makes daily rinsing an enjoyable experience," explained Diane Dietz, Crest's North American general manager. "After more than 10 years of development and testing, Crest Pro-Health Rinse provides oral health benefits without the intense experience from alcohol, making it easier for consumers to use twice a day." The retail price is \$1.19 to \$7.99 for five different sizes ranging from 36ml. to 1.5 liters

Also promoting the benefits of alcohol-free rinses, Tom's of Maine, Kennebunk, ME, has earned the American Dental Association's Seal of Acceptance for its Natural Anticavity Fluoride mouthwash.

"Our oral care professionals have worked diligently to create another very effective, safe, pleasant-tasting product from plants and minerals that now has earned the highest recognition an oral care product can receive" said Tom's of Maine cofounder Tom Chappell.

According to the company, naturally sourced fluoride helps remineralize soft spots on teeth before they turn into full cavities and strengthens the tooth structure so enamel becomes more resistant to decay. The rinse contains green tea for astringency as well as aloe vera leaf juice and chamomile for a soothing feel. Flavors include natural peppermint, spearmint and cinnamon. The new personal care collection from New York City-based C.O. Bigelow Apothecary includes Dr. Keightly's Mouthwash Concentrate, a dentist-formulated mouthwash that contains natural herbal

extracts such as cinnamon, peppermint, clove, anise and menthol. The 8oz. glass bottle retails for \$12.

Listerine PocketMist Oral Care mist is an on-the-go portable pack that releases a gentle mist that kills over 99% of germs that cause bad breath.

"With today's hectic lifestyle, many people are looking for products that help them recapture that clean mouth feeling throughout the day," said Brian Cairns, senior product manager, Listerine Portables. PocketMist fits neatly in the palm of the hand so it's easy to carry in a purse or pocket. Sugar-free PocketMist comes in Cool Mint and Fresh Citrus flavors and a 140 single mists pack retails for \$2.99.

Also adding a minty burst is Crest Glide Deep Clean dental floss, formulated with special cooling ingredients that add a blast of freshness between teeth that continue after flossing.

### Where to Next?

Will innovation in oral care level off or continue to look for the next best thing? Mr. Tetreault noted that with baby-boomers hitting their 50s and 60s, offering ways to help consumers maintain healthy teeth and gums well into their senior years should get more focus from oral care companies.

"Momentum is certainly building for sensitive products as well, as we're seeing increased marketing efforts in this area," he added. "With roughly 30 million sensitive tooth sufferers and only about 1/3 treating the problem with sensitive toothpaste, there's still a lot of fertile ground for sensitive products."

Tom's of Maine's Dr. Maguire concurs. "The aging population and increased use of medications causing dry mouth will increase the demand for soothing, moisturizing oral care products. [There will be a] new appreciation for how oral health and overall health are connected, bringing new and growing emphasis on practices and products to deliver optimal health."

John Porter, President and chief executive officer of Breath Blaster sees the future trend in breath freshening moving away from gum and mints.

Dr. Fresh's Brett Mize adds, "For all the innovations and new items, the adult category is still lagging behind the growth of kids oral care, which utilizes increased technology and positive reinforcement. Because we know kids' toothbrushes are outpacing other oral care categories, it makes sense to capture sales in other flat areas, like mouthwash, with similar fun ideas."

Finally, Ms. Charlestein believes future trends will probably incorporate systemic solutions to dental problems, for example, vaccinations for caries.