

A year of innovation in oral hygiene, 2019

Oral care brands can tap into waste concerns, blur with food/drink, promote health/wellness themes or develop more customised formulas to add value and boost sales.



Rosalia Di Gesu

Global Beauty & Personal Care Analyst

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Global opportunities

1

Address waste concerns

More brands can **tap into heightened sustainability/waste concerns** but they must **deliver in terms of efficacy**. Disruptive waste-reducing NPD will attract attention and include: manual toothbrushes whereby **just the head needs replacing**; and **solid and portable toothpaste tabs/sticks** that don't need to be packed in plastic tubes.

2

Blur with food/drink and health/wellness trends

Brands that showcase the use of **superfoods or probiotics** can also align with trending health/wellness themes and educate consumers about the [link between oral health and overall health](#). Hybrid oral care drinks/foods (eg [Quii](#), [Moma porridge](#) and [Swirlit](#)) can tap into '**oral health from within**' trends and also promote convenience.

3

Tap into customisation trends

There is a gap for more specialised oral care NPD (eg for men, seniors, pregnant women, dry mouth) and for brands to be **influenced by customisation trends gaining ground in beauty**. Explore the potential for **bespoke 'pick & mix' services** that allow users to create their own oral care product based on specific ingredients/benefits.

Our pick of the most innovative launches in this review



Plastic-free 'stick in a card tube' 'toothsoap'

[Georganics English Peppermint Tooth Soap Stick](#) taps into waste concerns and offers users a new way to use toothpaste. The 'toothsoap' comes in a stick form to be rubbed onto a toothbrush and does away with the need for a plastic tube (UK).



Inside-out oral health

[Swirlit Fresh Mouth Health Shot](#) is a dentist-developed sugar-free tea drink with xylitol, prebiotics, cinnamon, green tea, and grape seed extract – designed to freshen the mouth, soothe the stomach and combat bad breath (Australia).



Stylish, beauty-like packs

The [Projecto Botánico](#) vegan personal care brand made from 100% natural, cruelty-free and sustainable ingredients includes oral care products in minimalist and stylish pack designs reminiscent of that seen in beauty markets (Mexico).

Our pick of the most innovative launches in this review



Fun and novelty Valentine's Day positioning

[Colgate Dare to Love Fluoride Toothpaste](#)

toothpaste targets the Valentine's Day market with its dissolvable heart-shape flakes, 'romantic' red/pink pack and space for a hand-written note (Asia, UK).



Targets men and focuses on fresh breath
[Nonio Strong Energy Mint Flavour Medicated](#)

[Toothpaste](#) targets men concerned about bad breath. It uses dark pack colours and 'strong' messaging to denote efficacy and appeal to men. It includes medicated toothpaste and mouthwash (Japan).



Edgy pack design inspired by the periodic table

[Elements](#) is a new premium toothpaste collection in bold block-coloured packs (black, pink, blue) with a design inspired by the periodic table. Flavours include lemon verbana, grapefruit rose, citrus and apple mint (South Korea).

How Mintel Trends are impacting oral hygiene



Sub-Zero Waste

[Lamazuna Ecological Soft Toothbrush](#) taps into Mintel BPC's 2019 Trend [Sub-Zero Waste](#) by featuring an interchangeable head that allows users to replace just the head when it's worn away, rather than the whole brush (France).



Transumers

[Listerine Go! Tabs Clean Mint Chewable Tablets](#) are bi-layered, compressed mouthwash tablets that are chewed, swished around the mouth, and swallowed – no need to spit out. It taps into Mintel's Trend [Transumers](#), which examines scope for portable products (US).

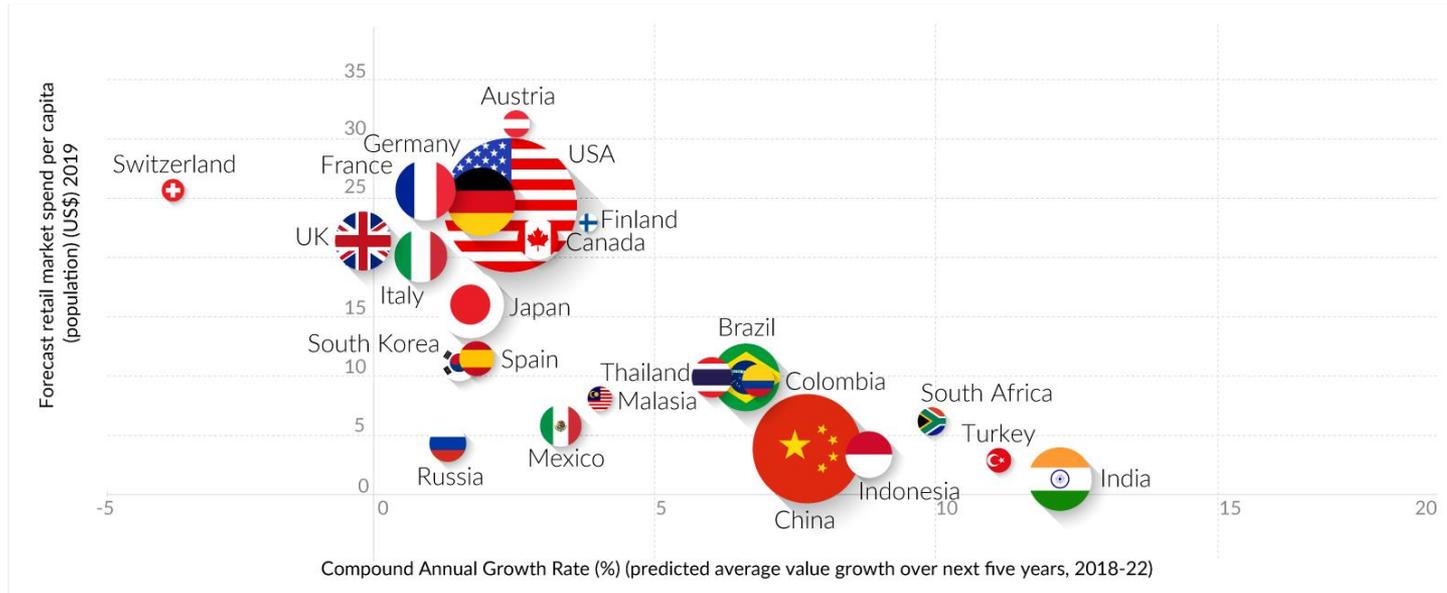


Total Wellbeing

[Ascentical Solid Toothpaste](#) is part of a men's grooming collection. It contains 100% natural and 15% organic ingredients and promotes how it preserves the balance of the oral flora – tapping into Mintel's [Total Wellbeing](#) Trend (Germany).

Global retail market overview: oral hygiene, 2019

Emerging economies of India and Turkey are forecast to see the highest CAGR. In contrast, the market is slowing in many mature markets including the UK, the US and Japan.



ASIA PACIFIC (APAC)



Read on [mintel.com](https://www.mintel.com)

The opportunities: APAC

1

Blur with food/drink markets

To stand out in an increasingly cluttered natural space, brands can **blur with food/drink and use marketing that speaks of using 'edible' and 'safe' hero ingredients** (eg premium salt, matcha tea). They can also **explore newer 'inside-out oral health' concepts** – influenced by innovations such as Swirlit tea drinks with oral benefits.

2

Tap into waste concerns

Address waste concerns and embody the Mintel BPC 2019 Trend [Sub-Zero Waste](#). Disruptive NPD can **use upcycled food waste** – a trend gaining ground in beauty. Toothbrushes can **emphasise the use of sustainable alternatives to plastic** (eg bamboo, sugarcane). **Solid toothpastes** can minimise waste by reducing the need for plastic tube packs.

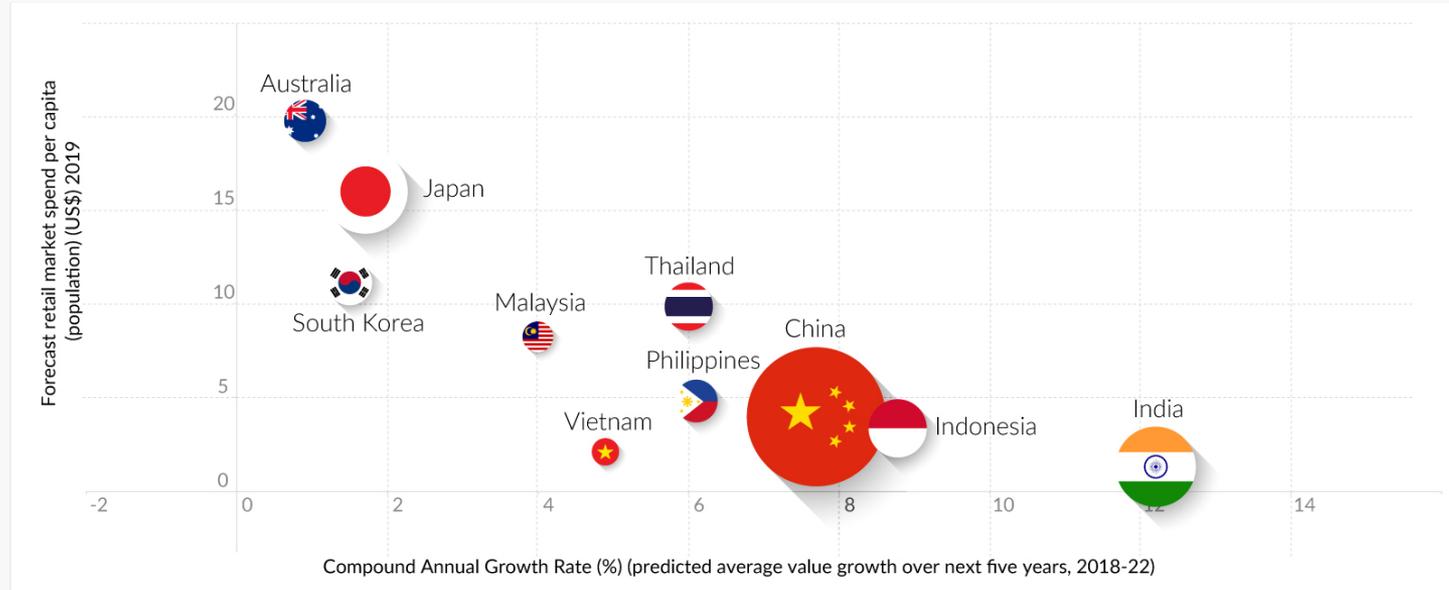
3

Develop more bespoke products

Oral care brands in Asia are boosting segmentation and **offering customised lines for men, older consumers or pregnant women**. Going a step further, they can **be inspired by beauty** and offer bespoke concepts, such as **'pick & mix' services** allowing users to select ingredients/benefits and create their own personal toothpaste/mouthwash.

APAC retail market overview: oral hygiene, 2019

India shows highest forecast growth driven by [increasing awareness of the important of oral health](#). The market is slowing in mature markets of Australia, Japan and South Korea.



APAC: natural, traditional and eco-friendly growth potential

Focus on the natural, traditional and foodie

Promote naturalness by blurring with food or traditional oral remedies. In India, for example, many clean their teeth with traditional products such as neem twigs, salt and ash.

INDIA

27%

of Indian oral care product users agree that [natural/ayurvedic toothpaste is more effective/suitable](#) than standard

ABOVE-AVERAGE AND RISING BOTANICAL NPD

25%

of oral care launches in APAC in 2018 featured a botanical claim vs the [19% global average](#) and [vs 14% in 2014 globally](#)

Base: 2,783 Indian adults aged 18+ who have used any oral care products in last 6 months

Source: IPSOS Observer/Mintel



Read on [mintel.com](https://www.mintel.com)

Innovations blur with food/drink to evoke sense of naturalness/safety

NPD in 2018 blurred with food/drink markets – embodying Mintel's BPC 2025 Trend [Gastronomia](#) – in an effort to stand out and bring a greater sense of being natural and safe.

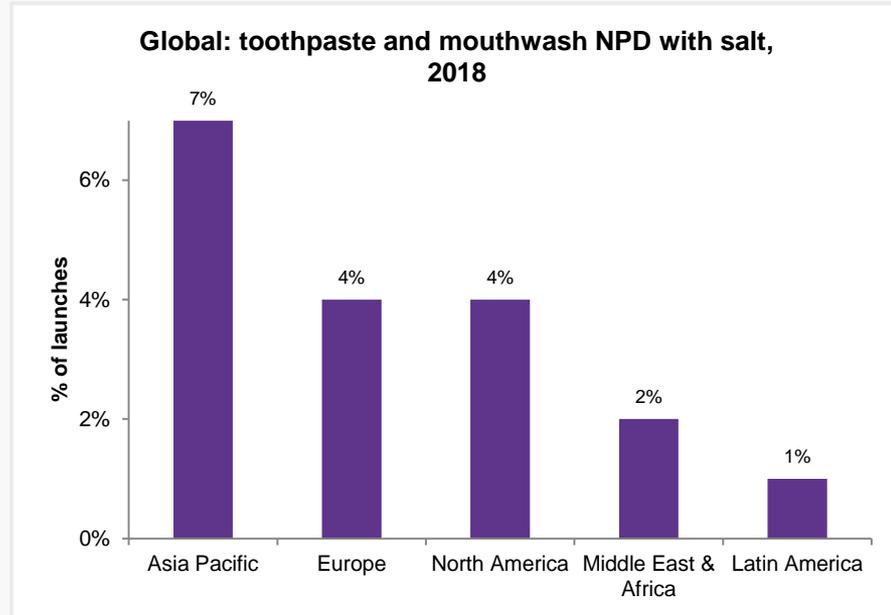


'[Eat Me](#)' natural toothpaste with Jeju Hallabong (citrus fruit) flavour



Inside-out oral health: [Swirlit Fresh Mouth Health Shot](#) tea drink with xylitol and prebiotics

The marketing of traditional salt formulas is most prevalent in APAC



The renowned antibacterial and healing properties of salt have made it a popular traditional oral care remedy.

Indeed, saltwater rinses can alkalise the mouth and help kill acid-producing bacteria that cause dental disease and tooth decay.

The marketing of salt formulas in the toothpaste and mouthwash sub-categories in particular is most prevalent in APAC, aligning with consumer interest in more natural remedies.

Brands can add value by detailing the salt's provenance or using more specialised variants.

Traditional salt rinses/toothpastes get a premium upgrade



Guerande sea salt from Brittany

[Salarium Sea Breeze Mint Flavour Guerande Salt Premium Toothpaste](#) contains 97.4% natural ingredients including Guerande sea salt from Brittany, which is rich in healthy minerals and trace elements such as zinc, iron and manganese (South Korea).



Himalayan salt

[Bamboo Salt Himalaya Pinksalt Floral Mint Flavour Mouthwash](#) is made with Himalayan pink salt, bamboo salt and *Centella asiatica* to care for gums, freshen breath and whiten teeth (Taiwan).



Pure salt from France

[Median Sogeumui Myeongjak Gum Care Salt Energy Toothpaste](#) uses imagery to showcase the inclusion of pure salt. The salt is sourced from France and the toothpaste is positioned to help prevent gum disease (South Korea).

Glister's expansion into the 'herbals' segment targets local preferences

Big brands that appeal to local tastes and traditions will fair better than those that don't. This is a route taken by direct selling company, Amway.

Glister Herbals, launched in India, marks the brand's entrance into the 'herbals' toothpaste segment.

It has been **especially developed to appeal to Indian consumers** interested in familiar tooth-caring herbal ingredients. It contains 11 herb ingredients, including spearmint, clove, ginger, neem and mulethi – traditionally renowned as having oral care benefits.

For added value, it claims to protect from germs and freshen breath for up to 12 hours, and taps into waste/sustainability concerns – see our Mintel 2019 Trend [Sub-Zero Waste](#) – by making it clear that it contains biodegradable microbeads with essential oils.



Showcase hero natural ingredients: matcha tea

Brands must continue to showcase hero plant ingredients to stand out. Tea-themed NPD is evolving, with matcha making a greater appearance in APAC oral care in 2018.



Matcha flavour

[Sunstar Ora2 Breath & Stain Care Matcha-Mint Care Mouthwash](#) has a matcha-mint flavour to freshen breath (Malaysia).



Matcha flavour

[Lion Systema Uji Matcha Gum-Care Toothpaste for Night](#) is designed for night-time use and has a matcha green tea flavour (China).



Matcha

The [Propolinse](#) mouthwash brand with antibacterial propolis has expanded to include a Matcha variant. It contains green tea extract to cleanse and prevent bad breath and has a cooling and sweet matcha flavour (Singapore, Thailand).

Showcase hero natural ingredients: bamboo vinegar



[Ushine Bamboo Vinegar](#) collection

Bamboo vinegar, a natural liquid formed during the production of bamboo charcoal and claimed to have lots of health benefits (eg reducing odour and disinfecting) is making an appearance in the oral care market in China.

The new Bamboo Vinegar collection from Ushine includes: toothpastes in Whitening Spearmint and Refreshing Bamboo variants to deeply clean teeth/interdental space around the teeth; Mouthwash to cleanse and protect; and Oral Spray with a refreshing bamboo fragrance.

Showcase hero natural ingredients: Aloe vera

Familiar *Aloe vera*, a popular and established natural BPC ingredient is making greater inroads in the APAC oral care market.

It has recently been used as the hero ingredient in the new Pleasia toothpaste variant from Amorepacific, launched in South Korea.

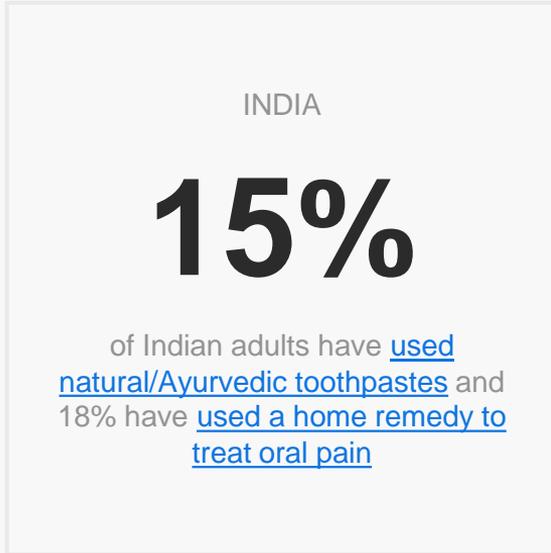
The new Oasis *Aloe Vera*-flavoured variant promotes how *Aloe vera* extract helps refresh the mouth.

It also contains green tea extract to prevent gum infections and eradicate bad breath, and erythritol to cool.



[Pleasia Oasis Aloe Vera Flavour Toothpaste](#)

Take on board the popularity of Ayurveda in India



Ayurveda medicine is an integral part of Indian culture and is influencing NPD in oral care.

Using Ayurveda messaging in marketing helps brands appeal to consumers who see this traditional practice as more holistic, natural and safe.

We expect continued growth in Ayurveda oral care NPD, tapping into the Mintel Trend [Total Wellbeing](#), which examines how consumers are treating their bodies like an ecosystem and seeking solutions that complement their personal health and evolving needs.

There is a close [link between oral health and overall health](#), something Ayurvedic toothpaste users are more attuned to. Indeed, [24% of natural and Ayurvedic toothpaste users agree that having dental problems negatively impacts overall health](#) (eg contributes to heart disease) vs 11% overall.

Base: 3,000 Indian adults aged 18+; 2,360 Indian adults aged 18+ who have used any toothpaste in the last 6 months

Source: IPSOS Observer/Mintel



Read on [mintel.com](https://www.mintel.com)

Ayurveda messaging in oral care will continue and tap into health/wellness trends



Ayurvedic oil pulling solution
[SimSim Sesame Oil Pulling Natural Mouthwash](#) contains sesame oil, peppermint oil, eucalyptus oil and tea tree oil to help draw out bacteria in the mouth. Oil pulling is rooted in Ayurvedic practices (Thailand).



Ayurvedic toothpaste from local herbal player
[Patanjali Dant Kanti Fresh Active Gel Toothpaste](#) is an Ayurvedic toothpaste with pomegranate, liquorice, clove etc. Patanjali Ayurved was founded by yoga guru Baba Ramdev and billionaire businessman Acharya Balkrishna in 2006 (India).



Colgate's Ayurvedic toothpaste moves into Sri Lanka
[Colgate Swarna Vedshakti Anticavity Toothpaste](#) has expanded into Sri Lanka after having launched in India in 2016. It has been created with 'Ayurvedic expertise' and includes clove, neem, honey, Indian gooseberry and basil (Sri Lanka).

Natural NPD aligns with eco-friendliness and waste concerns

Natural innovations are increasingly aligning with sustainability concerns.

There is **scope for more eco-friendly NPD**, embodying the Mintel BPC 2019 Trend [Sub-Zero Waste](#), which examines how brands must act now to address waste concerns and be disruptive with their eco innovations.

Bamboo toothbrushes are marketed as both natural and sustainable and will continue to grow.

APAC NATURAL/ECO BLURRING

26%

of [botanical/herbal oral care launches featured an ethical/environmental claim](#) – vs
12% overall

MINTEL

Read on [mintel.com](https://www.mintel.com)

Look to New Zealand: Ecostore spots a gap in sustainable oral care



[Ecostore's new oral care range](#)

Ecostore, a New Zealand brand of sustainable home, body and baby care products, first established in 1993, has recently added an oral care range to its portfolio – spotting an opportunity in this space.

The toothpaste and mouthwash use naturally derived ingredients such as magnolia bark extract, kanuka oil and essential oils to appeal to consumers.

The toothbrushes are made using 99% renewable Carbon Capture plant-based materials from renewable sugarcane, which helps address plastic waste concerns and also help people reduce their carbon footprint. Indeed, the company claims that as sugarcane grows, it helps remove carbon from the atmosphere.

Look to New Zealand: Do Gooder spots a gap in sustainable oral care

Do Gooder's eco and natural toothbrushes and floss are focused on **helping reduce waste from the dental industry**.

The handles for its 'ecobrushes' are **made from renewable, biodegradable and sustainable bamboo** and, while the bristles are nylon-based, the company emphasises how this is an area where it did not want to compromise, **recognising the need for natural/sustainable brands to also be effective**.

Ecofloss taps into waste concerns by being **packaged in reusable and recyclable glass bottles**; with one of the two variants made from 100% biodegradable silk floss. The other may be nylon-based but it also contains bamboo charcoal to increase its biodegradability.

The brand was **created by dentists helping convey trust and a sense of efficacy as well as eco-friendliness**.



[Do Gooder's Ecofloss and Ecobrush focus on reducing waste](#)

Expanding flavour choices inspired by nature

Flavour and scent are important to oral care consumers, with nature-inspired flavours expected to continue to drive NPD.

LONG-LASTING FRAGRANCE

68%

of consumers in China like to experience a [long-lasting smell](#) when brushing their teeth

HERBS AND FRUIT

60%

of consumers in China show most interest in [herb flavours](#) when brushing teeth, closely followed by [fruit](#) (59%)

NPD

31%

of mouthwash/toothpaste launches in APAC in 2018 clearly marketed [mint as a flavour](#), followed by herbs and strawberry (5% each)

Base: 3,000 Chinese internet users aged 20-49

Source: KuRunData/Mintel; Mintel GNPD



Read on [mintel.com](https://www.mintel.com)

Little Dome adds natural and exotic flavours to its premium toothpaste brand



Established mint flavours may drive NPD and show greatest consumer interest but other **nature-inspired and novelty scents and flavours can expand**. They can **appeal to more experimental younger consumers**, especially if they are also presented in **stylish packs** and are not overly expensive.

E-commerce Little Dome is an example of a **disruptive flavour-focused oral care player**. It has expanded its range of premium fashion-led toothpastes in colourful round-shaped pump bottles to include **carrot and bird's nest toothpaste variants**.

The brand has also **moved into the retail space**, opening a fashionable [Little Dome 4°C Toothpaste Store](#) in China.

Global and local players experiment with healthy ginger

Oral care brands that experiment with ginger as a flavour can also explore its potential use as a [pain reliever and anti-inflammatory ingredient](#).



[Listerine Gum Care Herbal Ginger Mouthwash](#) with a refreshing ginger flavour



[Natoral Korean Ginseng Mouthwash](#) with ginseng extract to destroy harmful bacteria and microbes

APAC: opportunities for greater segmentation

Offer more specialised and personalised options

There is scope for more segmentation in the oral care market, especially in developed countries (eg Japan and Australia) as a way to add value and stand out.

Customised products can appeal to consumers who seek products suited to their age group, specific oral health conditions and lifestyles.

MINTEL TREND

Make it Mine

looks at how [customisation has become increasingly important](#) to consumers who believe they know what they need better than anyone



Read on [mintel.com](https://www.mintel.com)

Colgate brings personalisation, fun and a gifting element to toothpaste

Colgate is bringing fun, novelty and personalisation to a functional toothpaste market with the launch of personalised limited edition products that can also be gifted.



For Valentine's Day

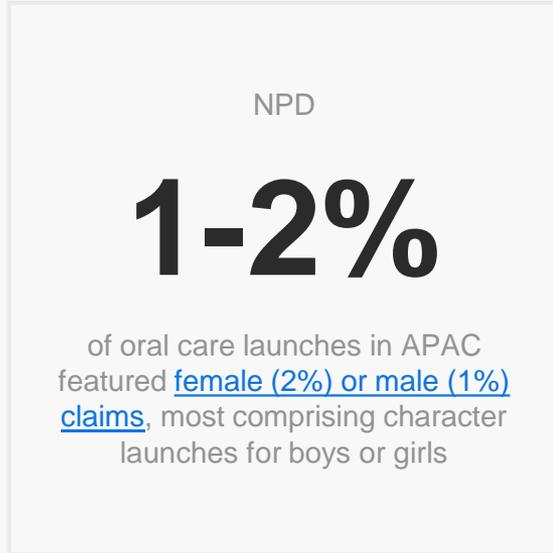
[Colgate Dare to Love](#) toothpaste with dissolvable heart-shape flakes targets the Valentine's Day market with its 'romantic' red/pink pack and space for a hand-written note. It first launched in Asia in 2018 and has also expanded into the UK.



New Year resolution printed on-pack

[Colgate's New Year Resolution](#) toothpaste is presented in a pack with a yellow strip where the resolution is printed, as a reminder each morning. The toothpaste builds strong teeth while the Resolution helps build 'inner strength' (India).

Gap for more customised NPD for men, women and older consumers



There is a gap for more customised NPD for demographic groups [beyond kids \(15% of launches in 2018\)](#) or [babies \(7%\)](#).

In 2018, we saw a few brands in Asia **target men (marketing strong flavours and using dark pack colours)**, **pregnant women (focused on naturalness and safety)** and **older consumers (focused on gum care)**.

Whitening innovations can use marketing that speaks of offering **Instagram-ready smiles to appeal to more appearance-focused younger men and women** or **anti-ageing benefits to appeal to older consumers**.

Going a step further, oral care brands can **be inspired by beauty markets** where we are seeing **more bespoke NPD** (eg [Colours ABC](#), [Innisfree My Foundation](#)). For example, they can **create a 'pick and mix' toothpaste service that allows consumers to select ingredients and benefits for their specific oral care needs**.

Base: 3,000 internet users aged 20-49

Source: Lightspeed/Mintel; Mintel GNPD



Read on [mintel.com](https://www.mintel.com)

Dark pack colours, 'strong' and 'energising' claims active in niche men's segment

In China, men's NPD can better promote breath-freshening benefits since Chinese [men worry more about bad breath](#) (54% vs 46% of women).



Black and gold pack colours, extreme cooling claims

[Median Premium Men's Freezing Cool Toothpaste](#) offers an 'extreme cooling' effect using menthol to freshen breath. It also whitens and strengthens teeth and helps remove plaque and tartar (South Korea).



Energising and testosterone-increasing claims

[Little Dome X Sir Energy Toothpaste](#) with pheromone, Lingzhi mushroom and a 'peptide-active factor' from truffle eases fatigue and boost testosterone. It blurs with beauty, highlighting top notes (ocean) and base notes (Indian mint) (China).



Strong energy mint flavour, focus on bad breath

[Nonio Strong Energy Mint Flavour Medicated Mouthwash](#) targets men concerned about bad breath. It uses dark pack colours and 'strong' messaging to denote efficacy and appeal to men. It includes medicated toothpaste and mouthwash (Japan).

NPD for mums-to-be is most active in Asia and focuses on naturalness/safety



Lactic acid bacteria, fermented rice, xylitol
[Chu Chu Baby Apple Mint Mouthwash with L8020 Lactic Acid Bacteria](#) targets pregnant women. It includes lactic acid bacteria, fermented rice and xylitol to naturally care for teeth and freshen breath (Japan).



Free from and natural claims
[Cent17 Mama Holic Toothpaste](#) targets pregnant women looking for products deemed to be more natural and safer vs standard products. It is fluoride-free, made with natural ingredients (eg spearmint and xylitol) (South Korea).



Food-grade, added folic acid and vitamin C
[Chuang Ying Scrienen Mouthwash](#) is a mouthwash set in fruit flavours (eg blueberry, apple, kiwi) aimed at pregnant women. It contains 'food-grade' ingredients and is enriched with folic acid (protect teeth) and vitamin C (gum care) (China).

Whitening claims, beauty themes and edgier pack designs can appeal to younger consumers

Whitening ([23% of APAC oral care NPD in 2018](#)), beauty-theme and edgier pack designs can target social media-influenced youngsters looking to show off.



White Peach whitening variant
[GSK Aquafresh Extreme Clean Whitening Toothpaste](#) has expanded with the launch of a White Peach variant with orange and white stripes. It removes yellow stains and plaque from even hard-to-reach areas of the mouth (Japan).



Top, middle and base notes
[Mujirushi Ryohin Teeth Wipes](#) blur with BPC not just due to their wipe format, but their fragrance-like marketing. They feature top notes of peach and green, a middle note of rose and a base note of musk (Japan).



Edgy pack design inspired by the periodic table
[Elements](#) is a new premium toothpaste collection in bold block-coloured packs (black, pink, blue) with a design inspired by the periodic table. Flavours include lemon verbana, grapefruit rose, citrus and apple mint (South Korea).

Few brands overtly target older consumers

There is a gap in the market for more oral care brands to target older consumers who are living longer and taking greater care of their health.

They can **promote how usage of their products can: help older people minimise dentist bills and prevent tooth loss; address issues around teeth sensitivity, gum disease and stains; and use older brand ambassadors in advertising to be more credible.**

In Japan, Lion Corporation is aiming its [Dent Heath Fresh Breath Medicated Toothpaste](#) to the over-50s. It focuses on minimising bad breath, which can be exacerbated among the over 50s, as gum related issues increase. It also helps strengthen teeth, suppress swelling and bleeding of gums and promote blood circulation in the gums.



[Fresh Breath Medicated Toothpaste](#)

Innovations for sensitive teeth or that focus on gum care can target older consumers

57% of Chinese adults experience bleeding gums (top [dental issue experienced](#)), 48% gingivitis and 36% sensitive teeth/gums, conditions likely to be exacerbated in later years.



Down feather-soft bristles for sensitive gums

[Down Feather Soft Toothbrush](#) features 0.15mm down feather soft bristles to especially care for sensitive gums. The handles also have novelty designs (eg fishes, polka dots) to bring fun and excitement to the morning (China).



Focused on caring for gums

[LG Bamboo Salt Shang Ya Mint Flavoured Expert Gum Care Toothpaste](#) contains bamboo salt, myrrh, rhatany root and chamomile and is designed to help improve gum swelling and bleeding (China).

Base: 3,000 internet users aged 20-49

Source: KuRunData/Mintel



Read on [mintel.com](https://www.mintel.com)

Microbiome-friendly innovations can target health-conscious older consumers

Trending microbiome-friendly formulas can target health-conscious seniors. In China, 49% of 55-74 year olds would like to [spend more time maintaining their health](#).



With imported probiotics
[NVR Forest Mint Flavoured Probiotic Toothpaste](#) contains probiotic ingredients such as *Lactobacillus*, which have been imported – as a way to denote better quality. It helps maintain healthy gums, reduce bad odours and freshen breath (China).



Probiotics to balance oral microbiome
[Healso Green Tea Flavoured Yi Qi Refreshing Toothpaste](#) contains probiotics to improve the balance of the oral microbiome (China).

Base: 800 seniors aged 55-74

Source: KuRunData/Mintel



Read on [mintel.com](https://www.mintel.com)

Portable solid toothpaste tabs appeal to busy consumers on-the-go



Solid toothpastes are emerging in South Korea in particular, **promoting portability and ingredient efficacy**.

They can expand across APAC countries and **target working-age consumers who travel or commute** – tapping into the Mintel Trend [Transumers](#), which examines how the time people spend in transit offers new marketing opportunities.

In 2018, just 3% of oral care launches in APAC were marketed as [suitable for on-the-go](#), similar to that seen in the previous four years.

Base: 3,000 Indian adults aged 18+

Source: IPSOS Observer/Mintel



Read on [mintel.com](https://www.mintel.com)

Solid toothpaste/tabs promote portability and ingredient preservation



Chewable solid toothpaste tablets

[Bring Green Blending Tea Toothpaste Tabs](#) are marketed as ideal for on-the-go. The tabs need to be chewed before brushing with a toothbrush. They are available in Apple Lime and Grapefruit Mint flavours (South Korea).



Chewable toothpaste pastilles

[Ladent Vita Cleansing Chewable Toothpaste Pastilles](#) are made with an ActiV-Lock technology that doesn't use water or heat and preserves ingredients. Includes lemon, green tea, xylitol etc. For use with or without a brush (South Korea).



Solid toothpaste tablets

Portable [Solid Toothpaste](#) in Soda, Hurb and Cafe flavour groups. It has 0% water, includes natural ingredients (eg Korean bamboo salt, Finish xylitol) and is produced without moisture, heat or vacuum to preserve ingredients (South Korea).

Meet the Expert



Rosalia Di Gesu

Global Beauty & Personal Care Analyst

rdigesu@mintel.com

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