

Amazon Oral Care

Category Scale, Share Shifts, and Assortment Signals for Target

Timeframe: TTM Jan 5, 2025 – Jan 4, 2026

Primary Objective: Identify (1) where growth is structurally occurring, (2) who is gaining share and why, and (3) which brands/ASINs create real assortment pressure or opportunity for Target.

1) Executive Summary: What's happening and why it matters

The category is in an accelerated growth phase

- Amazon Oral Care TTM revenue: \$3.64B
- Prior 12 months (12–24 month revenue): \$2.65B
- YoY growth: +37.2% (TTM vs prior)

Implication: In a +37% growth environment, “growing” is not enough. Brands must grow **faster** than +37% to hold or gain share.

Growth is being driven by three structural forces

1. **Premiumization via systems** (appliances, whitening kits, refill ecosystems)
2. **Functional differentiation** (enamel, sensitivity, gum health, hydroxyapatite)
3. **Fragmentation** (legacy leaders losing share as the market expands into challengers)

A Target buyer should care because...

Amazon is producing measurable, early signals of:

- Which “next wave” brands have moved beyond niche and are now real scale
 - Which legacy leaders are vulnerable (share losses) despite still being large
 - Which subcategories are emerging as meaningful dollar pools (denture/retainer care)
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2) Category Structure: Where the dollars are (and what is changing)

2.1 Category mix (Amazon Category Tree – annualized)

Annualized from monthly revenue rollups in the Category Tree (Level 3):

- **Toothbrushes & Accessories:** ~\$874M (largest segment)
- **Toothpaste:** ~\$653M
- **Dental Floss & Picks:** ~\$544M
- **Mouthwash:** ~\$272M
- **Teeth Whitening Products:** ~\$263M
- **Denture Care:** ~\$224M

Insight: Target's core categories remain the center of gravity, but **whitening + denture/retainer care** have reached scale that justifies real strategic focus.

2.2 Where growth is actually concentrated (ASIN aggregation by subcategory)

These are the biggest subcategories by dollar volume **with YoY growth**:

Largest dollar pools

- **Toothpaste:** \$700M, +41%
- **Water flossers (Power Dental Flossers):** \$397M, +16%
- **Replacement brush heads:** \$332M, +33%
- **Sonic toothbrushes:** \$313M, +23%
- **Mouthwash:** \$295M, +23%
- **Rotating power toothbrushes:** \$198M, +38%

Fast growth pockets (large enough to matter)

- **Denture cleansers:** \$148M, +85%
- **Manual toothbrushes:** \$142M, +60%
- **Dental floss:** \$148M, +48%
- **Whitening kits:** \$113M, +46%
- **Interdental floss picks:** \$62.6M, +39%

Target insight:

Two different stories are happening at once:

- **Core replenishment categories are growing** (Toothpaste +41%, Floss +48%, Manual brushes +60%)

- But the biggest incremental share shift comes from **systems + specialized needs** (replacement heads +33%, rotating powered +38%, denture cleansers +85%, whitening kits +46%)
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3) Price & Premiumization: What the shopper is telling us

3.1 Revenue vs units by price band (Buy Box Price, weighted by TTM revenue)

This is the clearest “barbell” evidence in your dataset:

- **<\$10: 14.5% of revenue, 38.2% of units**
- **\$10–\$25: 38.8% of revenue, 43.6% of units**
- **\$25–\$50: 26.2% of revenue, 14.0% of units**
- **\$50–\$75: 6.1% of revenue**
- **\$75–\$100: 4.4% of revenue**
- **\$100–\$200: 8.1% of revenue**
- **\$200+: 1.9% of revenue**

Key takeaway: About **14.4% of all category revenue is now \$75+**.

That's not fringe—it's a real, stable premium tier supported by appliances and whitening systems.

Target implication:

- The right question is not “Should Target play premium?”
 - It's “How does Target **architect premium tiers** so shoppers can trade up in a way that fits a mass environment?”
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4) Competitive Landscape: Who is big, who is growing, who is gaining share

4.1 Largest brands on Amazon (TTM size + YoY)

Top 5 brands by TTM revenue:

1. **Oral-B: \$390.5M, +31.5% YoY, 10.73% share**
2. **Philips Sonicare: \$345.4M, +15.1%, 9.49% share**
3. **Crest: \$246.7M, +34.9%, 6.78% share**
4. **Waterpik: \$180.2M, +11.2%, 4.95% share**

5. Colgate: \$147.8M, -13.2%, 4.06% share

But here's the real story: category growth is **+37.2%**.
So most legacy leaders are **not keeping pace**.

4.2 Share shift math: who is gaining and losing share (pp)

Share change computed as:

(Brand share TTM) – (Brand share prior 12 months)

Largest share gainers ($\geq \$10M$ TTM)

These are the brands creating the most meaningful “watch list” pressure:

1. **Zima Dental** – **\$32.9M, +221%, +0.52 pp**
2. **Boka** – **\$59.8M, +95%, +0.49 pp**
3. **Sensodyne Pronamel** – **\$45.3M, +96%, +0.37 pp**
4. **LIVFRESH** – **\$17.6M, +348%, +0.34 pp**
5. **Onlyone** – **\$16.5M, +400%, +0.33 pp**
6. **Opalescence** – **\$50.0M, +66%, +0.24 pp**
7. **Tao Clean** – **\$12.6M, +311%, +0.23 pp**
8. **NOBS** – **\$15.4M, +128%, +0.17 pp**
9. **Davids** – **\$17.1M, +95%, +0.14 pp**
10. **Burst** – **\$12.9M, +79%, +0.08 pp**

Insight: Share gainers cluster into two archetypes:

- **Functional premium toothpaste** (Boka, Pronamel, LIVFRESH, Davids, NOBS)
 - **System devices/treatments** (Zima, Onlyone, Tao Clean, Opalescence, Burst)
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Largest share decliners ($\geq \$10M$ TTM)

1. **Colgate** – **\$147.8M, -13%, -2.36 pp**
2. **Philips Sonicare** – **\$345.4M, +15%, -1.82 pp**
3. **Waterpik** – **\$180.2M, +11%, -1.16 pp**
4. **Lumineux** – **\$38.8M, -20%, -0.77 pp**
5. **TheraBreath** – **\$67.3M, -3%, -0.77 pp**
6. **Oral-B** – **\$390.5M, +31%, -0.46 pp**

What this means for Target:

- This isn't “legacy brands are weak.” It's “the market is expanding faster than they are.”
- Vulnerability shows up first in appliances and premium adjacencies.

5) ASIN-Level “Exhibits”: The products creating real momentum

5.1 Largest revenue ASINs (category “anchors”)

These are the ASINs acting as major dollar engines:

- **Crest 3D Whitestrips Professional Effects (B00AHAWWO0): \$56.1M, +35.7%**
- **Philips Sonicare ProtectiveClean 5300 (B084TM4XKG): \$39.6M, -5.7%**
- **Aquasonic Black Series (B072YVWBXH): \$33.4M, +32.6%**
- **Oral-B iO Deep Clean (B0B5HRWH1S): \$33.3M, +42.0%**
- **Waterpik Aquarius (B00HFQQ0VU): \$31.9M, +10.1%**

Insight:

- Whitening is still dominated by a single mega-hero (Whitestrips) that keeps growing
- Sonicare has huge anchors but softness is showing in hero SKUs
- Aquasonic is a meaningful value-premium appliance brand at scale

5.2 “Big + Fast” breakouts ($\geq \$10M$ TTM and $\geq +50\%$ YoY)

These are the products that often foreshadow shelf pressure:

- **Zima Dental Pod (B0CXTJPKZF): \$20.8M, +212.6% (2023 launch)**
- **Oral-B Pro 1000 (B003UKM9CO): \$20.2M, +65.0%**
- **Oral-B iO Deep Clean + Protect (B0DCCJZC9F): \$16.7M, +258.5% (2024 launch)**
- **Waterpik Cordless Pulse (B0CNTRVZPW): \$13.1M, +74.1% (2023 launch)**
- **Crest 3D Whitestrips Sensitive White Kit (B0BVT76MFH): \$11.0M, +1537% (2023 launch)**

Target insight:

This set of breakouts shows where consumers are moving:

- **Sensitivity + whitening** is not niche; it's scaling fast
- **Cordless + portable appliances** are a meaningful growth vector
- **Retainer/aligner cleaning devices** are now legitimate category dollars, not novelty

6) Brands to Watch: Target relevance, why they're winning, and how to engage

This section is designed to be buyer-ready: **size, growth, share change, what's driving it, and what it suggests for Target.**

Tier 1: "Already meaningful scale + gaining share"

These are the brands most likely to come up in a Target conversation.

Boka

- **\$59.8M TTM, +95%, +0.49 pp**
- Primarily driven by **hydroxyapatite toothpaste** (functional premium paste)
- **What it signals:** consumers are actively trading up for ingredient-led claims
- **Target-fit hypothesis:** Strong candidate for a curated premium paste tier or digital-first test

Zima Dental

- **\$32.9M, +221%, +0.52 pp**
- Driven by the **Zima Dental Pod** (retainer/aligner cleaning device)
- **What it signals:** oral care is expanding into “dental device care” and routines
- **Target-fit hypothesis:** Digital test + premium endcap adjacency (aligned with Invisalign/retainer ecosystem)

Sensodyne Pronamel

- **\$45.3M, +96%, +0.37 pp**
- Enamel positioning is performing extremely well
- **What it signals:** enamel repair/protection is a leading functional driver
- **Target-fit hypothesis:** Strengthen enamel-focused laddering, ensure visible shelf education

Opalescence

- **\$50.0M, +66%, +0.24 pp**
- Professional-grade whitening system positioning
- **What it signals:** there is room above Whitestrips for premium “treatment” positioning
- **Target-fit hypothesis:** Premium whitening ladder extension (especially online)

Tier 2: "High growth, earlier scale, strong concept signal"

These are “build a relationship now” brands.

LIVFRESH

- **\$17.6M, +348%, +0.34 pp**
- Functional plaque story with premium pricing
- **Target-fit hypothesis:** Digital-first trial, strong for premium “oral health” segment

Onlyone

- **\$16.5M, +400%, +0.33 pp**
- Cordless portable flosser value proposition
- **Target-fit hypothesis:** Appliance set adjacency, especially travel and compact tiers

NOBS

- **\$15.4M, +128%, +0.17 pp**
- Toothpaste tablets: sustainability + travel + minimalist
- **Target-fit hypothesis:** Natural/clean and travel adjacency, small footprint test

Davids

- **\$17.1M, +95%, +0.14 pp**
- Natural premium paste positioning
- **Target-fit hypothesis:** Expand premium/natural paste tier with credible traction

Burst

- **\$12.9M, +79%, +0.08 pp**
 - Dentist-backed + design-forward
 - **Target-fit hypothesis:** Works as a premium youth-forward brand if packaging communication is crisp
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7) What this means for Target: Insight-led implications (not generic recommendations)

Insight 1: Appliances are still huge, but the “moat” is shrinking

- Sonicare and Waterpik are large but losing share (-1.82 pp and -1.16 pp)
- The growth is shifting toward:
 - **portable cordless**
 - **value-premium**
 - **better feature communication**

Implication for Target:

Revisit appliance price ladders. A tighter, better-architected ladder may outperform simply expanding SKU count.

Insight 2: Toothpaste is growing faster than the category and fragmenting by benefit

- Toothpaste is **\$700M** and **+41% YoY**
- Brands gaining share are benefit-led (hydroxyapatite, enamel, plaque control)

Implication for Target:

The assortment opportunity is not more toothpaste, it's a clearer **benefit architecture** with fewer redundant cavity items and stronger trade-up rungs.

Insight 3: Whitening is both a mature anchor and an innovation engine

- Whitestrips Professional Effects is **\$56M** and still growing **+36%**
- New whitening kits and sensitivity hybrids are exploding (e.g., **Sensitive White kit \$11M, +1537%**)

Implication for Target:

Treat whitening as a full ladder:

- entry strips
 - sensitive strips
 - premium kits
 - professional-style systems (Opalescence tier)
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Insight 4: Retainer/aligner/denture care is a stealth growth story

- Denture cleansers are **\$148M** and **+85% YoY**
- Zima's growth suggests "device-based cleaning" is pulling the segment upward

Implication for Target:

There is a credible adjacency opportunity around:

- Invisalign / retainers
- denture/retainer cleaning solutions
- ultrasonic cleaning devices (digital-first)

8) How to use this in a buyer conversation (suggested framing)

If you want the conversation to feel like a category strategy discussion, not a vendor pitch:

1. Start with the **market reality**: “Amazon oral care is \$3.6B and +37%.”
 2. Move to **where growth is structural**: toothpaste +41%, denture cleaners +85%, manual brushes +60%
 3. Then the **share shift** story: who’s gaining vs losing share and by how many points
 4. End with the **curated watch list**: brands and ASINs that are now too large to ignore
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9) “So what should Target be on the lookout for?” (clean summary)

On the lookout for:

- **Benefit-led paste trade-up** (hydroxyapatite, enamel, plaque control)
- **Cordless portable appliances** competing with legacy leaders
- **Whitening segmentation** (sensitivity + kits + professional systems)
- **Retainer/aligner care** as a new mainstream adjacency

Brands most worth watching now (scale + share gain):

- **Boka, Zima Dental, Sensodyne Pronamel, Opalescence**
Next wave to pressure-test via digital pilots:
- **LIVFRESH, Onlyone, NOBS, Davids, Burst**