

Analysis of Industry Development Opportunities and Risks

1.1 Development Opportunities and Key Driving Factors for the Water Flosser Industry

Table 1: Development Opportunities and Key Driving Factors for the Water Flosser Industry

Driving Factor	Description
1	<p>Consumption Upgrading and Personalized Demand</p> <p>As per capita disposable income rises, consumer demand for high-quality, personalized personal care products is constantly growing. As a vital tool for sophisticated oral care, water flossers cater directly to this trend.</p>
2	<p>Heightened Oral Health Awareness Drives "Auxiliary Cleaning" from Optional to Essential</p> <p>As public understanding of the importance of oral health deepens, the limitations of traditional brushing — specifically its inability to thoroughly clean areas such as interdental spaces and gingival crevices— are gaining increasing attention. Consequently, water flossers are entering the awareness of a wider consumer base as a supplementary tool to the traditional "toothbrush + dental floss" routine. Particularly within clinical settings — such as dental implant procedures, periodontal treatments, and orthodontic care—recommendations from dentists and public health education initiatives have significantly boosted the recognition and acceptance of water flossers. This shift has transformed the product's status from merely "optional" to "highly recommended," thereby expanding the fundamental demand base for the industry.</p>
3	<p>Growing Awareness of Healthy Lifestyles and Oral Health Importance</p> <p>With people's increasing awareness of healthy lifestyles and the growing emphasis placed on oral health, water flossers—originally widely adopted by households in Western nations—have been introduced to the domestic market, where they have garnered significant support and popularity among consumers. As a complementary tool to the toothbrush, water flossers effectively address cleaning challenges in interdental spaces and along the gumline that toothbrushes cannot resolve, thereby enabling consumers to achieve a more efficient and comprehensive oral cleaning routine.</p>
4	<p>High Prevalence of Dental Diseases</p> <p>The high prevalence of oral health conditions — such as dental caries (cavities), gingivitis, and periodontal disease—serves as a significant driving force behind the growth of the water flosser market. By providing deep cleaning for interdental spaces and subgingival (below-the-gumline) areas, water flossers effectively prevent and alleviate these issues, thereby earning the recognition and approval of an expanding consumer base.</p>

5	<p>Rapid Expansion of E-commerce Channels</p> <p>The rise of e-commerce and online retail platforms has provided convenient channels for the sale and market penetration of water flossers. Leveraging social media and e-commerce platforms, companies are able to reach consumers more efficiently and effectively, while simultaneously enhancing brand awareness.</p>
6	<p>Promotion by Professional Medical Institutions</p> <p>Recommendations from dentists and promotional efforts by dental clinics constitute a key driving force behind the market. Endorsements from medical professionals bolster consumer trust in the product, thereby stimulating sales growth.</p>
7	<p>Growth in Orthodontic and Dental Implant Patients Drives Specialized Market Segments</p> <p>Across both China and the globe, the number of consumers undergoing orthodontic treatment—particularly invisible aligners—and dental implant procedures is growing rapidly. The accompanying demand for post-operative care has propelled water flossers into the spotlight as a dentist-recommended tool for home dental hygiene. This specific user demographic places higher demands on features such as flushing depth, nozzle variety, and pressure control; moreover, they demonstrate greater brand loyalty and a stronger propensity for repeat purchases. This creates significant long-term value potential for the industry’s high-end product lines, specialized nozzle kits, and consumable-based business models.</p>
8	<p>Technological Upgrades Drive Enhanced User Experience and Boost Repeat Purchases</p> <p>In recent years, the core components of water flossers—such as miniature water pumps, pressure control chips, and leak-proof mechanisms—have undergone continuous iteration and upgrading. This has resulted in marked improvements in device performance across key areas, including noise reduction, pressure stability, battery life, and portability.</p> <p>Gentler water flow, quieter operation, and a wider array of mode options have lowered the barrier to entry for first-time users while significantly enhancing the long-term user experience. This dynamic fosters a positive word-of-mouth cycle characterized by a “low drop-off rate combined with a high recommendation rate.”</p>

Source: QYResearch, 2026

1.2 Risks Facing the Development of the Oral Irrigator Industry

Table 2: Risks Facing the Development of the Oral Irrigator Industry

Risk	Description
1	<p>Market Competition Risk</p> <p>With the rapid development of the oral irrigator industry, a large number of enterprises have entered the market, leading to increasingly fierce competition. Issues regarding product homogenization are prominent, and price wars occur frequently, which may erode corporate profit margins. Furthermore, intensified competition between leading brands and emerging brands places significant survival pressure on small and medium-sized enterprises (SMEs).</p>
2	<p>Lack of Consumer Awareness</p> <p>In certain markets, consumers still lack sufficient awareness regarding the functions and necessity of oral irrigators—particularly in developing countries and remote regions. This situation may result in a slower-than-expected rate of market penetration, thereby hindering overall industry growth.</p>
3	<p>Risk of Lagging Technical Innovation</p> <p>As consumer demand for intelligent and eco-friendly products rises, enterprises are required to engage in continuous technical innovation. However, some companies lack the necessary R&D capabilities or resources, which may result in their products losing market competitiveness and failing to meet user needs.</p>
4	<p>Product Safety and Quality Risks</p> <p>As a health device that comes into direct contact with the human body, the safety and quality of oral irrigators are matters of significant concern. Should a product malfunction during use or cause physical discomfort—such as gum injury—it would have a severe impact on the company’s brand reputation and market share, while potentially exposing the enterprise to legal liability and regulatory penalties.</p>
5	<p>Risks of Market Saturation and Shifting Demand</p> <p>In mature markets—such as developed nations—the penetration rate of water flossers is already high, and market growth may be approaching saturation. Concurrently, shifts in consumer preferences (such as a growing preference for emerging oral care tools) could dampen market demand for water flossers.</p>
6	<p>Price Factors: Water flossers featuring high quality and advanced technology often come with a higher price tag, which may dampen the purchasing inclination of some consumers. Particularly in economically less developed regions or households, price sensitivity can emerge as a constraining factor on the growth of the water flosser market.</p>

7	<p>Severe Product Homogenization: Low-Price Competition Squeezes Profit Margins</p> <p>The water flosser industry currently suffers from a high degree of product homogenization—particularly within the low-to-mid-range market segment—where the functionality, structural design, and aesthetics of different brands tend to be virtually identical. Consequently, brands rely primarily on the mere stacking of technical specifications and price-based promotions to attract consumers. This form of “cutthroat” competition makes it difficult for brands to establish sustainable long-term competitive barriers, while simultaneously severely compressing profit margins—a situation that hinders both continuous technological R&D and the development of robust customer service systems. Manufacturers lacking differentiated technologies or core channel capabilities therefore face the risk of being marginalized or eliminated entirely amidst these price wars.</p>
8	<p>After-Sales Support and Safety Incident Response Capabilities Determine a Brand’s Vitality</p> <p>Water flossers fall into the category of “oral-contact appliances,” involving the combined use of electricity and water; consequently, any incidents—such as electrical leakage, device rupture, or gum injury caused by excessive water pressure—can deal a severe blow to a brand’s reputation. Some brands lack systematic quality management and after-sales support systems; should they face a surge in user complaints, negative exposure on social media, or a spike in poor ratings on e-commerce platforms, they risk triggering a public opinion crisis and facing penalties such as product delisting.</p>

Source: QYResearch, 2026

1.3 Analysis of Policies in the Oral Irrigator Industry

On December 15, 2020, the nation's first *Electric Oral Irrigator* Group Standard—approved by the China Household Electrical Appliances Association (CHEAA) and drafted with the invited participation of Libode—was officially released and implemented. This milestone resolved the current predicament in the market and industry, where electric oral irrigators previously lacked a governing standard.

As an emerging category within oral care products, the release of this *Electric Oral Irrigator* Group Standard provides a crucial reference framework for enterprises regarding the R&D, design, and quality control of their electric oral irrigators. Simultaneously, it establishes clear selection criteria for consumers, effectively enhancing their product purchasing experience and further fostering the healthy and orderly development of the oral care industry—particularly in the electric oral irrigator sector.

On December 15, the CHEAA Standard T/CHEAA 0014—2020, *Electric Oral Irrigator*—drafted with the invited participation of Bohao—was officially released. This standard became effective on the date of its publication.

It is reported that this standard represents the industry's first performance standard specifically for electric oral irrigators, thereby resolving the aforementioned lack of regulatory standards for such devices. Its objective is to enhance product safety and user experience by establishing definitions, classifications, safety requirements, performance criteria, test methods, and inspection rules for electric oral irrigators. Furthermore, it aims to address existing confusion regarding the definition and classification of these devices, as well as the inconsistency of testing methodologies within the industry.

On February 28, 2024, the China Household Electrical Appliances Association unveiled the "C" Mark for oral irrigators. Acting in accordance with standard requirements and relevant national regulations, the CHEAA designates qualified third-party testing laboratories to conduct product testing for enterprises; the Association then grants permission to use the "C" Mark to those products that successfully pass the group standard testing.

The introduction of the "C" Mark for oral irrigators serves a dual purpose: on one hand, leveraging an authoritative platform and advanced standards, it identifies and distinguishes truly high-quality products; on the other hand, the presence of the "C" Mark significantly reduces the decision-making burden for consumers. Simply put, when shopping for an oral irrigator in the market, consumers can confidently recognize any product bearing the "C" Mark as a superior-quality device.

1.4 Analysis of the Impact of U.S. Tariffs on China on the Industry

1. Imposition of tariffs drives up the cost of export products, squeezing profit margins in the low-price segment.

When exported to the United States, water flosser products are primarily classified as small household appliances (e.g., under HTS Heading 8509) or liquid-spraying devices (e.g., under HTS Heading 8424). Once included in the Section 301 tariff list, they face additional duties ranging from 7.5% to 25%. This additional cost directly impacts Chinese manufacturers and exporting brands, dealing a particularly heavy blow to products marketed as "low-cost, high-volume cross-border bestsellers." For instance, an entry-level model originally priced at \$29.90 sees its profit margins drastically squeezed after factoring in these additional

tariffs and logistics costs, compelling some sellers to exit the market or pivot toward the mid-range, value-oriented segment.

2. Restrictions on Cross-Border E-Commerce Direct Shipping Drive Channel Compliance and Localization Strategies

Effective 2025, the United States is eliminating the tax-exempt status (known as *De Minimis* or Section 321) for "low-value packages originating from China," dealing a significant blow to water flossers—a quintessential "hit" category in cross-border e-commerce. Water flossers that previously entered the U.S. market via a "direct shipping plus low-value declaration" model must now contend with stricter requirements regarding customs clearance, tax reporting, and regulatory compliance. This shift not only drives up last-mile fulfillment costs but also squeezes the operating margins of "long-tail" sellers—primarily those operating via independent websites or small-parcel platforms. Consequently, the industry is increasingly consolidating around a new operational model: "local warehousing + bulk customs clearance + FBA/3PL distribution."

3. The relocation of manufacturing and the circumvention of rules of origin have become mainstream trends.

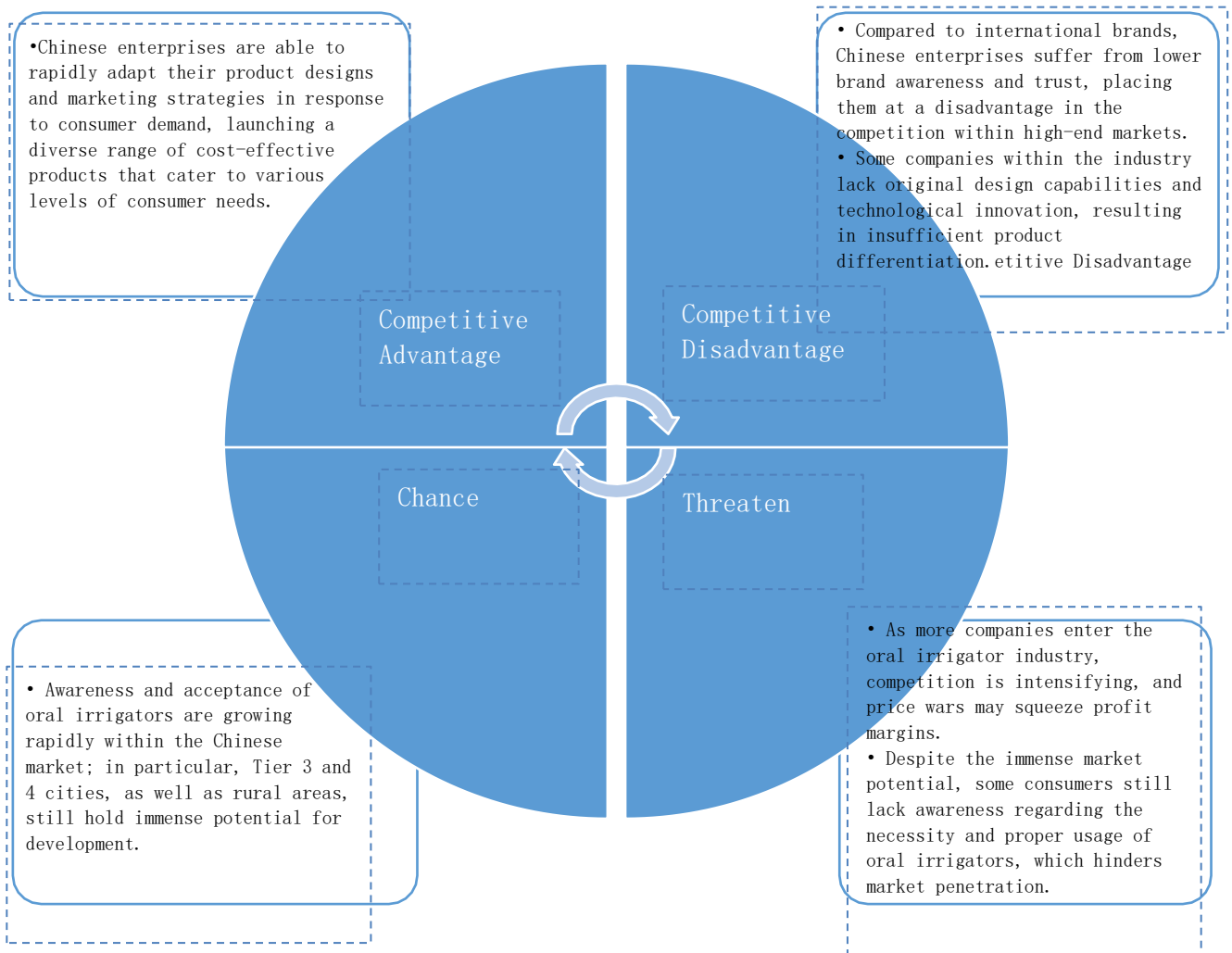
Faced with high tariff barriers, some capable enterprises are mitigating the impact by pursuing a strategy of "globalizing their supply chains." For instance, they are relocating specific assembly operations and injection molding processes to locations such as Vietnam and Malaysia to secure a "non-Chinese origin" label, thereby circumventing tariffs imposed on goods from China. Furthermore, other companies are experimenting with transit trade through third countries or establishing local subsidiaries in Mexico or the United States to handle final assembly and labeling — a strategy aimed at shifting the country of origin through "substantial transformation." However, these approaches entail stringent compliance requirements and substantial upfront investment costs, making them difficult for small and medium-sized factories to implement.

4. Rising Brand Concentration: Mid-to-High-End Strategies Emphasize Experiential Differentiation

Against the backdrop of rising costs, the industry as a whole is shifting its focus from a "battle of specifications" to a "competition of user experience." Brands capable of absorbing tariff costs are increasingly prioritizing differentiated design features — such as quiet operation, stable water pressure, extended battery life, and specialized nozzle configurations—thereby driving their products to break into the mid-to-high-end market segment priced above \$100. Concurrently, companies possessing key credentials—such as a registered U.S. business entity, FDA registration, and third-party testing certifications—are better positioned to gain algorithmic weight on the Amazon platform and secure recognition within retail distribution channels. Consequently, market share is gradually consolidating among a select few supply chain entities that possess both established brand equity and robust regulatory compliance capabilities.

1.5 SWOT Analysis of Chinese Enterprises

Figure 3: SWOT Analysis of Chinese Water Flosser Companies



Source: QYResearch, 2026