



The Rise of the Service-Driven Oral Ecosystem

The Future of Dental Care is Not a Product —
“It’s a Platform”

Sep 2025 version

Research methodology



for the technology overview report



1200+ patent
publications
analyzed



Analyzed top market
players for their product
offerings and activities
such as collaborations,
acquisition strategies,
etc.



Evaluated patent
portfolio strength based
on multiple quantitative
& qualitative
parameters



Study period:
From Jan 2023
to Sep 2025



100+ hours
invested

Some of the Eminent players covered in this report:

align™

Transforming smiles, changing lives.

PHILIPS



DentalMonitoring



mouthwatch®

QUIP



Colgate-Palmolive

smile™
DIRECT CLUB

P&G

Dentulu™
Dentistry Reinvented

fenco™

Introduction



Rethinking Oral Care

Oral care began with traditional solutions like toothbrushes, toothpaste, and rinses focused on hygiene and cavity prevention. It later expanded to therapeutic and cosmetic offerings—fluoride, whitening, orthodontics, and professional services—addressing both health and aesthetic needs.



But **what if your oral health could be continuously monitored, analyzed, and managed in real time—without waiting for symptoms to arise?**

Today, this vision is becoming reality. Fueled by **AI-driven diagnostics, teledentistry platforms, and connected devices, oral care is evolving into a personalized, proactive service ecosystem.** The industry is shifting beyond basic hygiene to integrated well-being—merging science, technology, and daily habit-building.

Driving the Shift to Service-Led Care

Key catalysts include **growing consumer demand for convenience and personalization, rapid advances in AI and remote monitoring, and the push toward affordable, accessible care.**

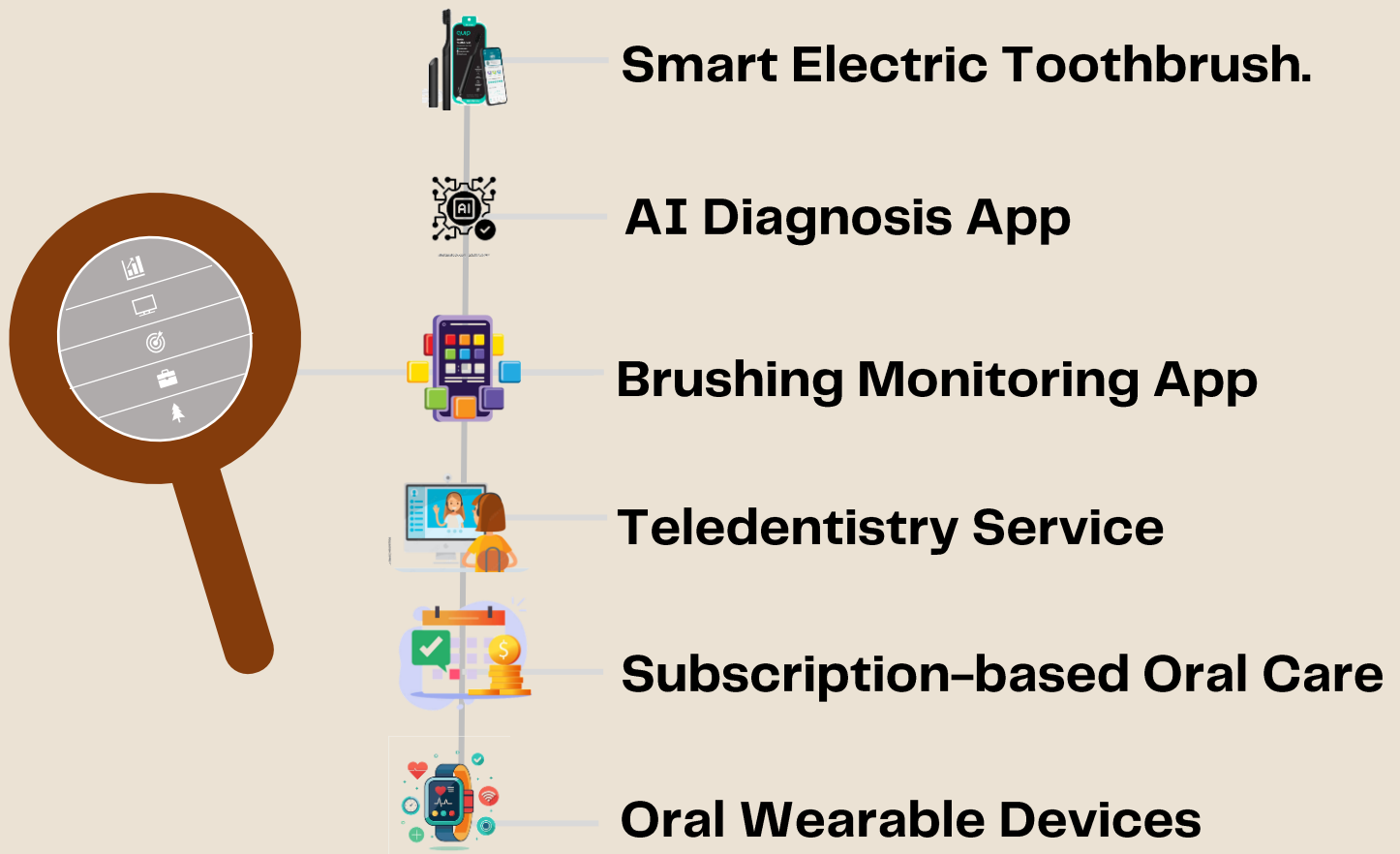
Companies are responding with **subscription models, digital platforms, and smart products** that turn routine oral care into an engaging, managed experience.

Services offered in Oral Industry



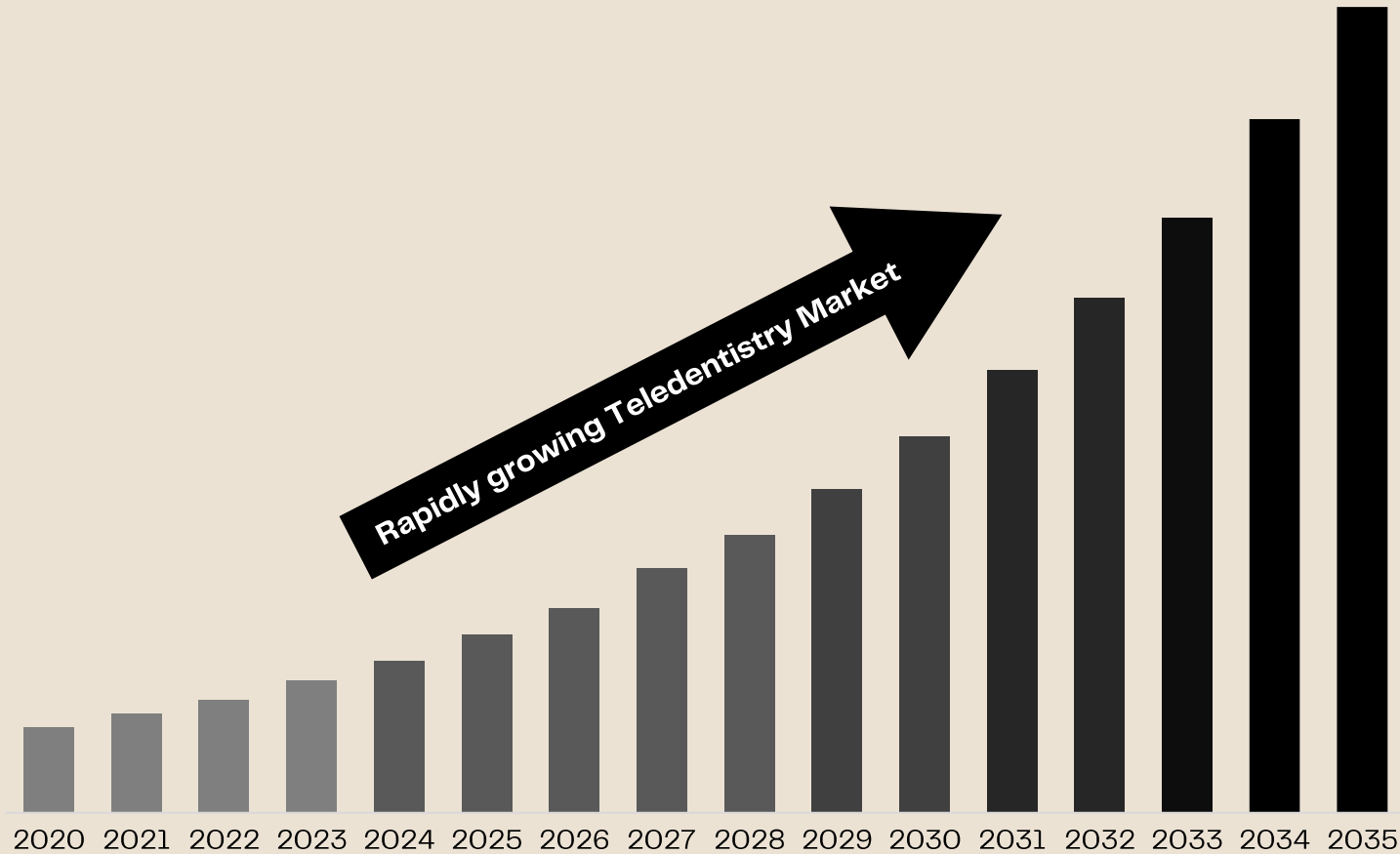
Pillars of the Modern Oral Care Service Model

The modern **oral care model integrates intelligent tools and digital services to create a continuous, patient-centric experience.** Smart/ App connected toothbrushes collect real-time brushing data, while AI-powered apps support early diagnosis and personalized insights. Monitoring platforms track oral hygiene habits, and virtual dental consultations enable timely professional care. Subscription-based services simplify access to essential products, and wearable devices further support prevention and health tracking—working together to deliver seamless, tech-enabled oral wellness.





Teledentistry Market Size,
2020–2035

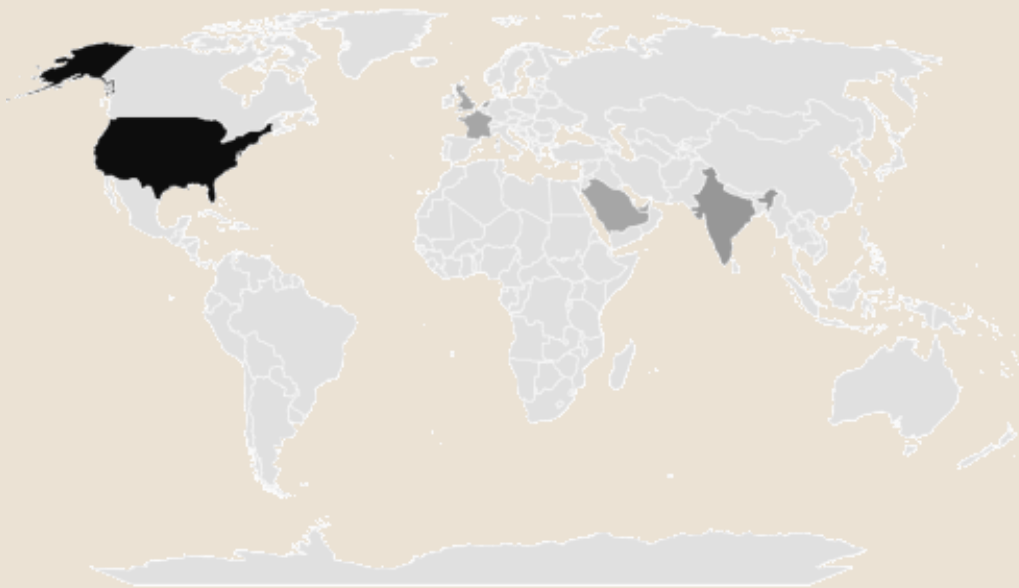


Oral Care Services



The Teledentistry market, a key sub-segment within the service-driven oral care industry, is projected to grow at a rate of over 16% during the forecast period. With the accelerating adoption of AI technologies and the rise of subscription-based models, the service-focused oral care industry is emerging as a robust and rapidly expanding market, offering numerous opportunities for future growth.

The players across the industry



The technology landscape is **dominated by U.S. players** who are actively driving market developments and product innovation.

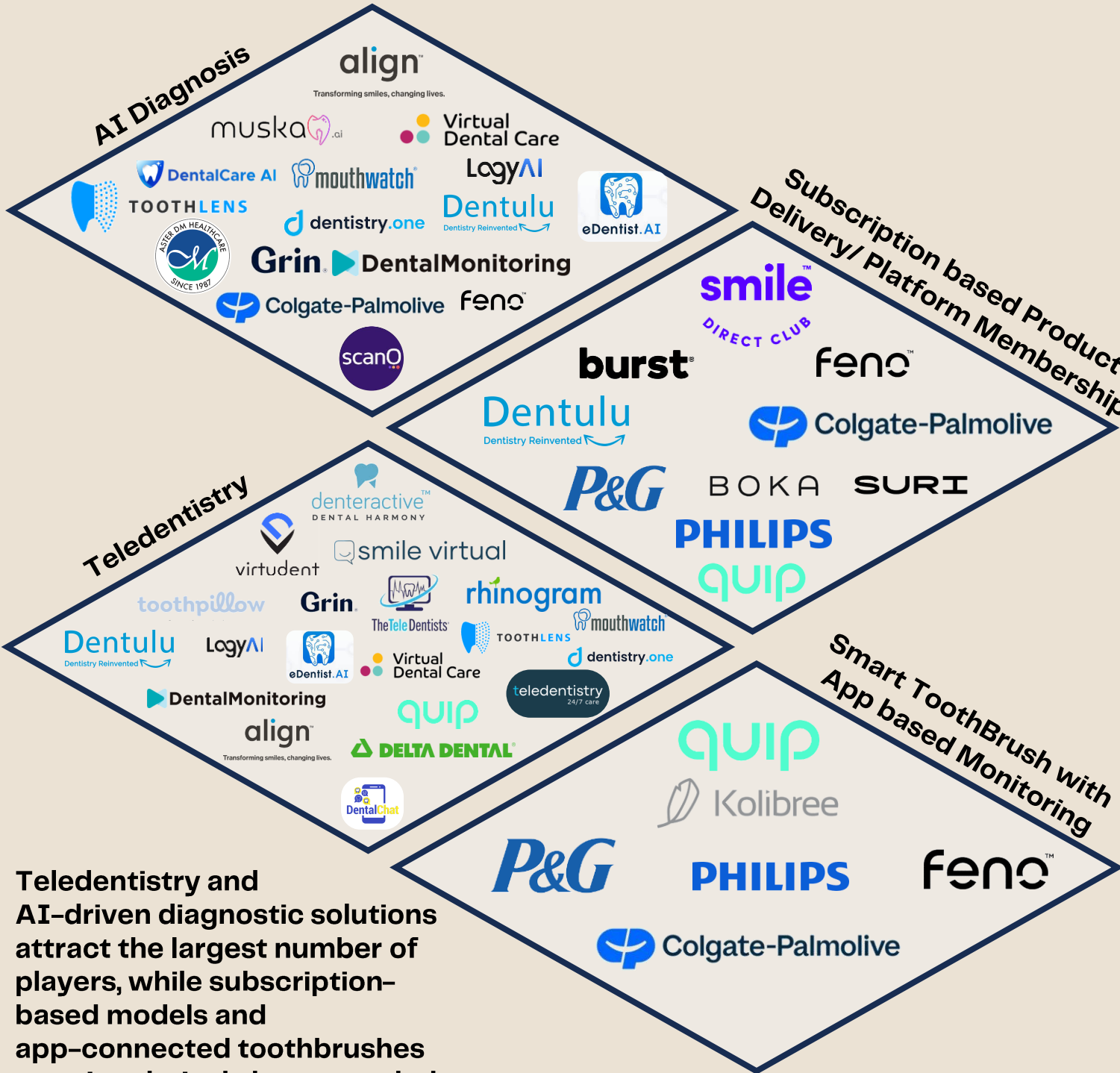
Well Established Companies

Transforming smiles, changing lives.

Emerging Startups

Startups lead the charge in the service-focused oral industry, fueling rapid innovation and growth, while **a few giants hold strong with scale and influence**.

Players focus among different Oral Care Services



Teledentistry and AI-driven diagnostic solutions attract the largest number of players, while subscription-based models and app-connected toothbrushes remain relatively less crowded.

A diversity of product offerings (1/2)



These innovators are redefining the oral healthcare industry with a gradual shift from products to services — **unlocking a future where oral care is smarter, connected, and more personalized.**

The listed products encompass a comprehensive ecosystem of AI-powered diagnostics, teledentistry platforms, and smart connected devices designed to modernize oral care. These technologies enable remote consultations, automated disease detection from scans, real-time brushing feedback, and subscription-based hygiene management—democratizing access to care, enhancing clinical accuracy, and empowering personalized, preventive health routines from home.



MouthWatch offers AI-powered **SmileScan** for free screenings, virtual dentist consultations via **Dentistry.One**, and the **TeleDent** software platform for clinics to provide comprehensive teledentistry services.



Teledentix and **Dental.com** provide web-based virtual care, from AI-powered photo assessments and 24/7 dentist access to a full management platform for providers and a network for patient consultations.



P&G, Oral-B's, ecosystem offers a **subscription for care routine. brush head refills** and a **smart brushing app** that provides real-time coaching for a complete, connected oral



A diversity of product offerings (2/2)



Grin.



GRIN offers the GRIN SCOPE intraoral scanner for AI imaging and the AI 3D TRACKER, a smart tool that monitors brushing technique and coverage for improved oral hygiene.

 **DentalMonitoring**



DentalMonitoring provides an AI-powered remote platform for orthodontic tracking (Dental Monitoring), pre-treatment patient assessment (DM Engage), and updated STL file generation for aligner fabrication (SmartSTL).

 **Colgate Palmolive**



Colgate-Palmolive offers the hum smart toothbrush for app-connected coaching and an AI Dental Screening platform for early detection of oral health issues through image analysis.

fenco™



Feno Elite Oral is a smart oral health tracker that monitors brushing technique. It connects to an app to provide data-driven feedback and personalized insights, helping users improve their daily cleaning routine and hygiene.

PHILIPS



Philips Sonicare's electric toothbrushes use sonic technology and sync with an app for real-time coaching and personalized feedback, ensuring a superior clean between teeth and along the gumline.

quip



Quip offers a smart electric toothbrush with app connectivity, a flexible oral care product subscription service, and a virtual teledentistry platform for remote dental consultations and assessments.

Collaborative initiatives across the industry



The oral care industry is seeing a surge in strategic collaborations as **teledentistry platforms, AI diagnostic developers, and dental brands unite** to build seamless virtual care ecosystems. These partnerships aim to enhance diagnostic precision, streamline workflows, deliver comprehensive care, and democratize access through scalable digital innovation.



quip has partnered with Recharge to enhance its subscription program, enabling smarter product bundling, data-driven retention, and seamless scalability. This move strengthens quip’s oral care ecosystem, boosts subscriber lifetime value, and advances its mission of making daily oral care simple and engaging.

20 Sep 2024



Carestream Dental’s Sensei has integrated with DentalMonitoring to embed AI-powered remote monitoring directly into the Sensei Cloud Ortho platform. The move streamlines workflows, boosts patient engagement, and supports hybrid orthodontic care—all while reducing in-office visits.

25 Apr 2025



Dentulu partners with Viome to make Viome’s CancerDetect saliva test available via Dentulu’s provider network. Leveraging RNA-based diagnostics, this home-administered screening aims for earlier detection of oral and throat cancers—enhancing dental settings’ role in preventive care.

02 Sep 2025

Recent launches across the industry



Many players are **launching service-enabled smart products and platforms**, marking a strategic shift from purely product-focused offerings to service-driven models, unlocking new revenue streams and enhancing long-term customer engagement.

05 Feb 2025

quip



quip introduced Ultra, its first professional-grade smart sonic toothbrush with LED touchbar intensity control, **Bluetooth** connectivity, and an app offering personalized coaching and real-time feedback to elevate at-home oral hygiene.

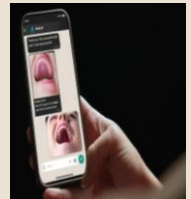
20 Nov 2024

Colgate Palmolive



Colgate-Palmolive introduced an AI-enabled oral health platform that analyzes user data and brushing habits to deliver personalized recommendations, empowering consumers to improve hygiene while advancing the company's mission of proactive, global oral care.

07 Jul 2025



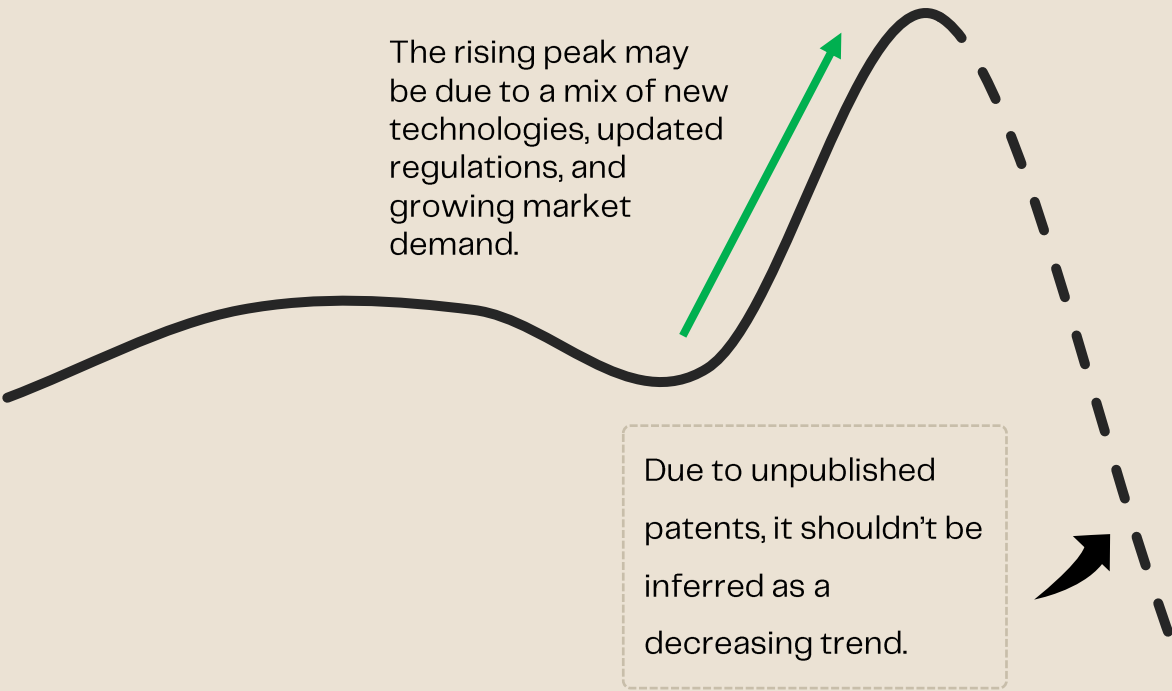
Aster DM Healthcare GCC launched Smyl AI in 2024, the UAE's first AI-powered dental screening via WhatsApp, offering free instant assessments and pioneering accessible, preventative care by lowering barriers to initial consultations.

Innovation pacing up across the patent segment



Filing trend

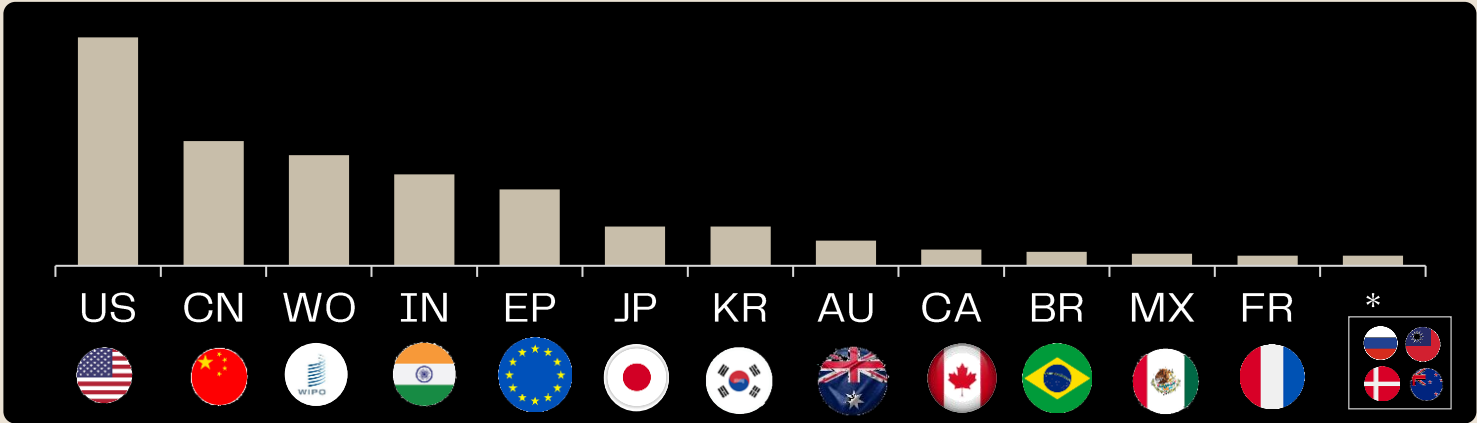
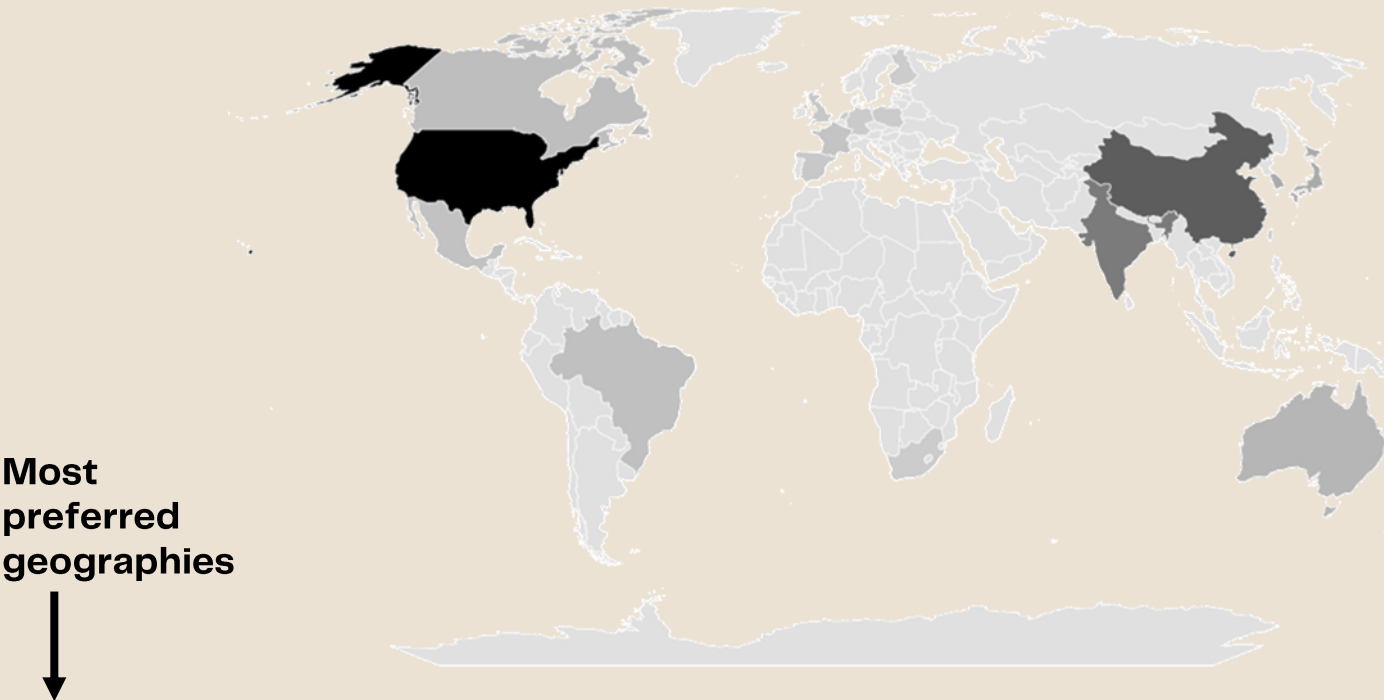
The patent filings in the domain of oral care have seen an exponential peak in the recent period, reflecting a surge in innovation and product development.



First Half 2023	Second Half 2023	First Half 2024	Second Half 2024	First Half 2025	Second Half 2025
Low	Medium	Medium	Low	High	Very High

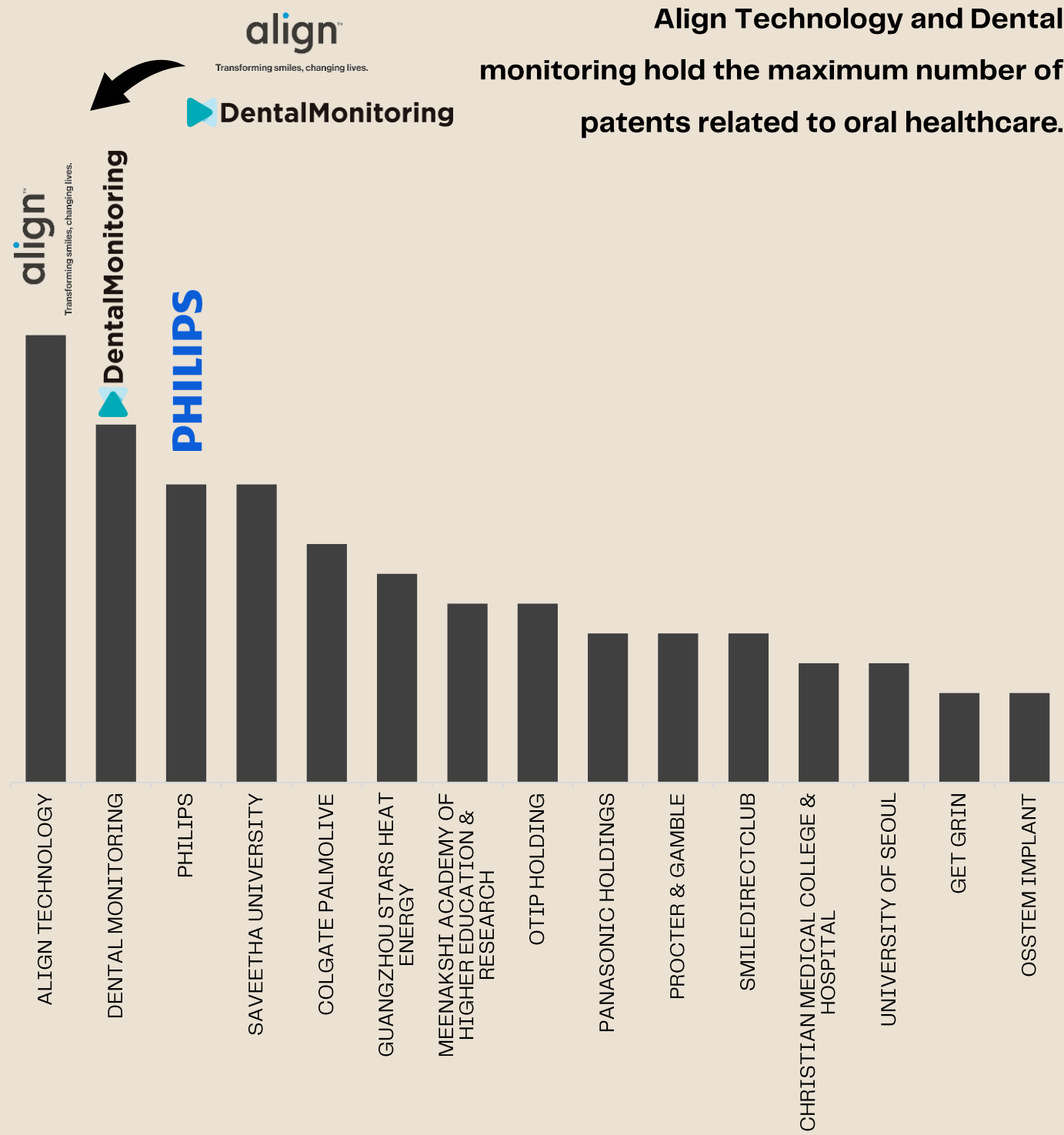
The graph illustrates a steady increase in activity within the oral care service industry from the second half of 2024 to early 2025, with notable growth observed in the first half of this year. Peak in 2025 indicate heightened innovation and service development. Overall, the trend highlights sustained momentum and continued technological advancement in the sector.

Preferred regions for patent protection



Based on the analysis of patent publications, the USA emerge as the most preferred region for patent filings, with a notable focus in other countries such as China, India, Europe, Japan, South Korea, and the Australia region.

Key players leading the patent race



Technology Trends in Oral Care Services



Includes references disclosing AI-based applications for oral health monitoring and diagnosis.



130

AI MONITORING AND
DIAGNOSIS APP

Includes references disclosing digital or remote oral care consultation, diagnosis, and dental service delivery platforms.



94

TELEDENTISTRY SERVICE

Includes references disclosing smart electric toothbrushes that are connected to mobile devices, or smartwatches for oral care.



92

SMART ELECTRIC
TOOTHBRUSH

Includes references disclosing apps for monitoring brushing behavior and oral hygiene.



77

BRUSHING MONITORING APP

Includes references that are not specific regarding the particular software, platform, or system functionality for oral care.



36

ORAL HEALTH MONITORING
APPS (IN GENERAL)

Includes references disclosing wearable oral devices such as smart mouthguards or smartwatches for oral health notifications.



9

ORAL WEARABLE DEVICES

Includes references disclosing oral care solutions, kits, or systems designed for home use (e.g., whitening kits, DIY aligners).



8

AT-HOME APPLICATIONS

Includes references disclosing business models or platforms offering recurring oral care product or service subscriptions.



6

SUBSCRIPTION-BASED ORAL
CARE

Includes references disclosing other miscellaneous technologies such as VR-based toothless jaw implantation operation teaching systems, virtual reality dentistry, and oral image scanning using a patient's cellphone with neural network processing for providing personalized aligners etc.



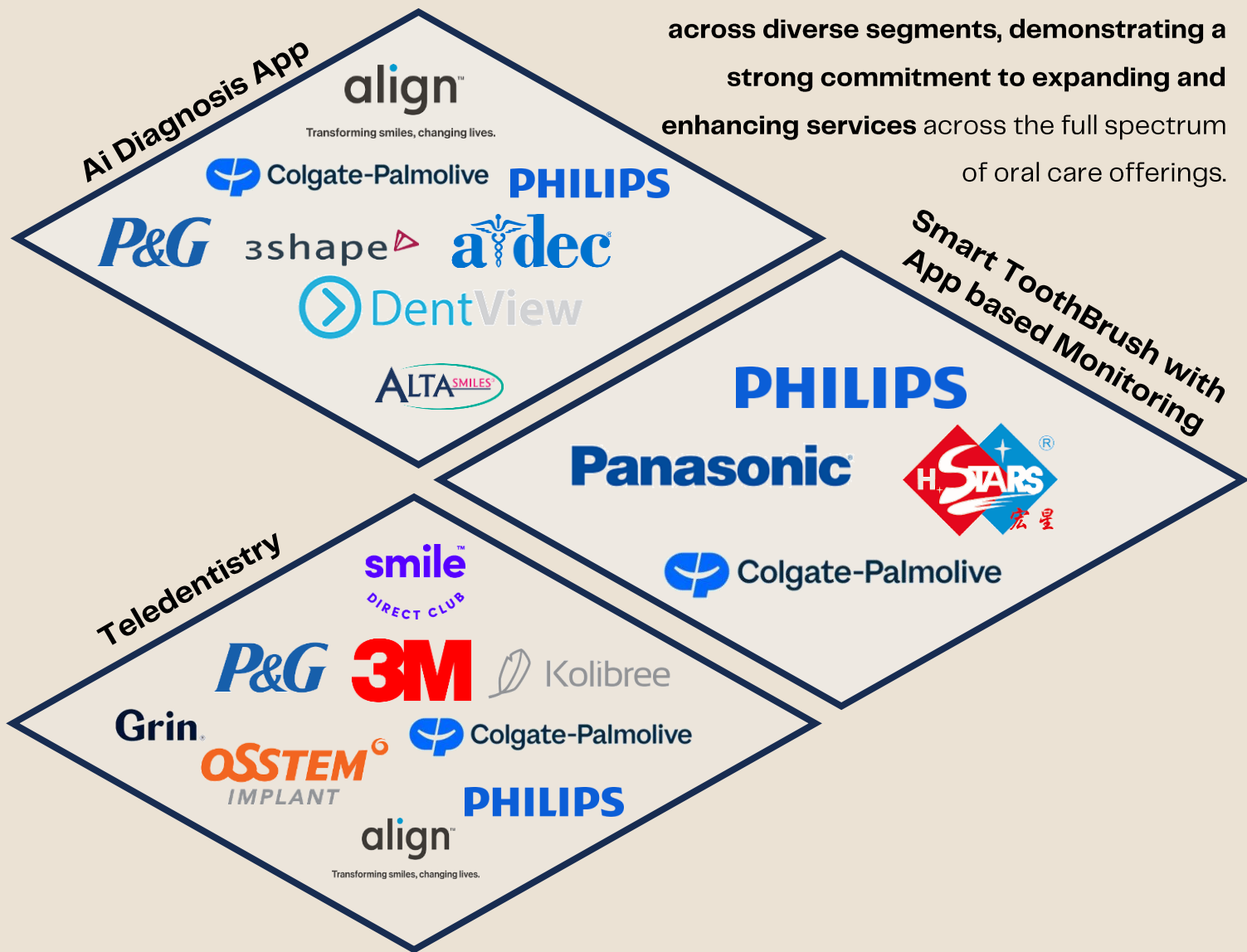
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OTHER SERVICES

Oral Care Services focused by Companies

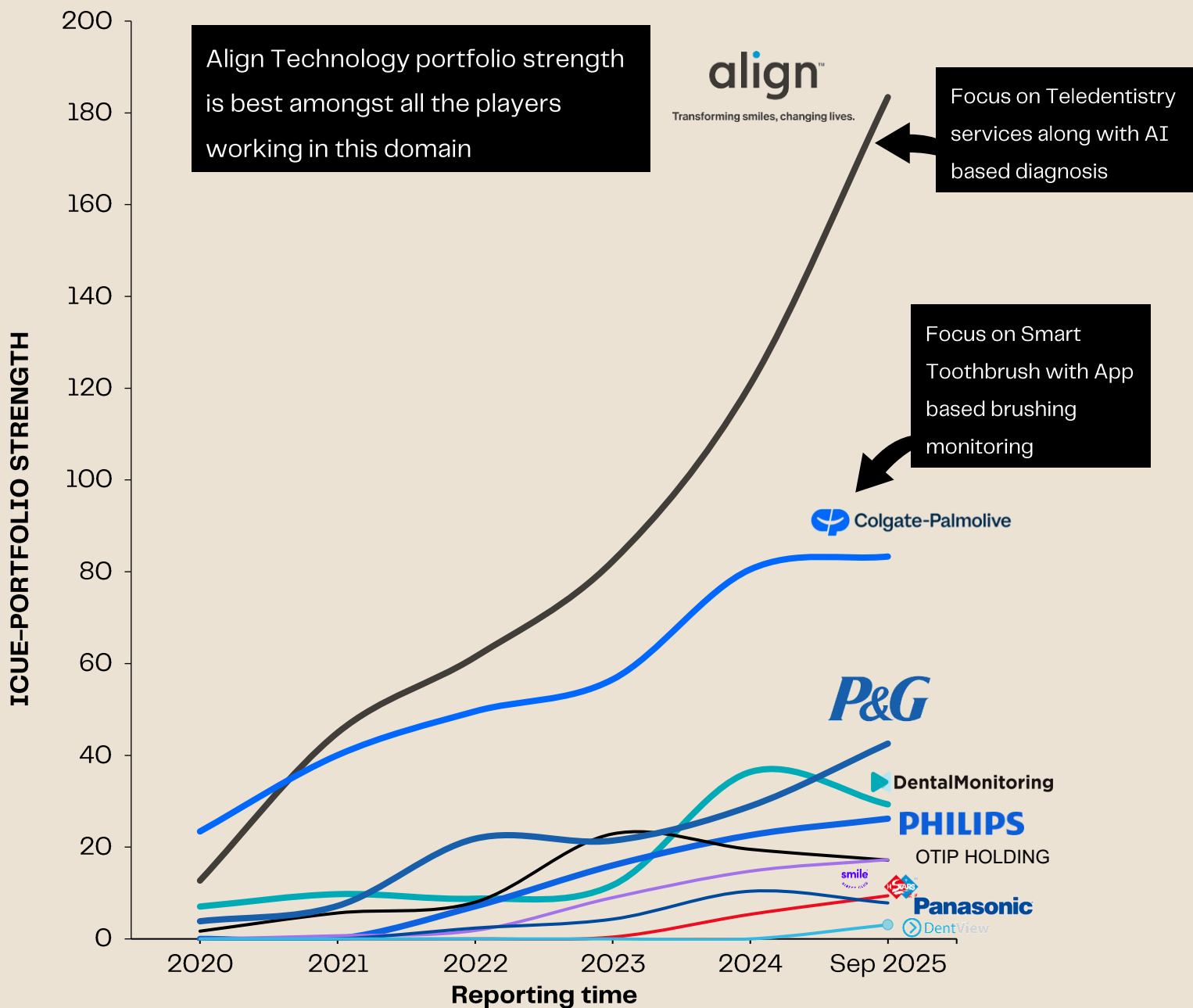


Leading oral care companies—Philips, Colgate-Palmolive, and P&G—are **actively innovating across diverse segments, demonstrating a strong commitment to expanding and enhancing services** across the full spectrum of oral care offerings.



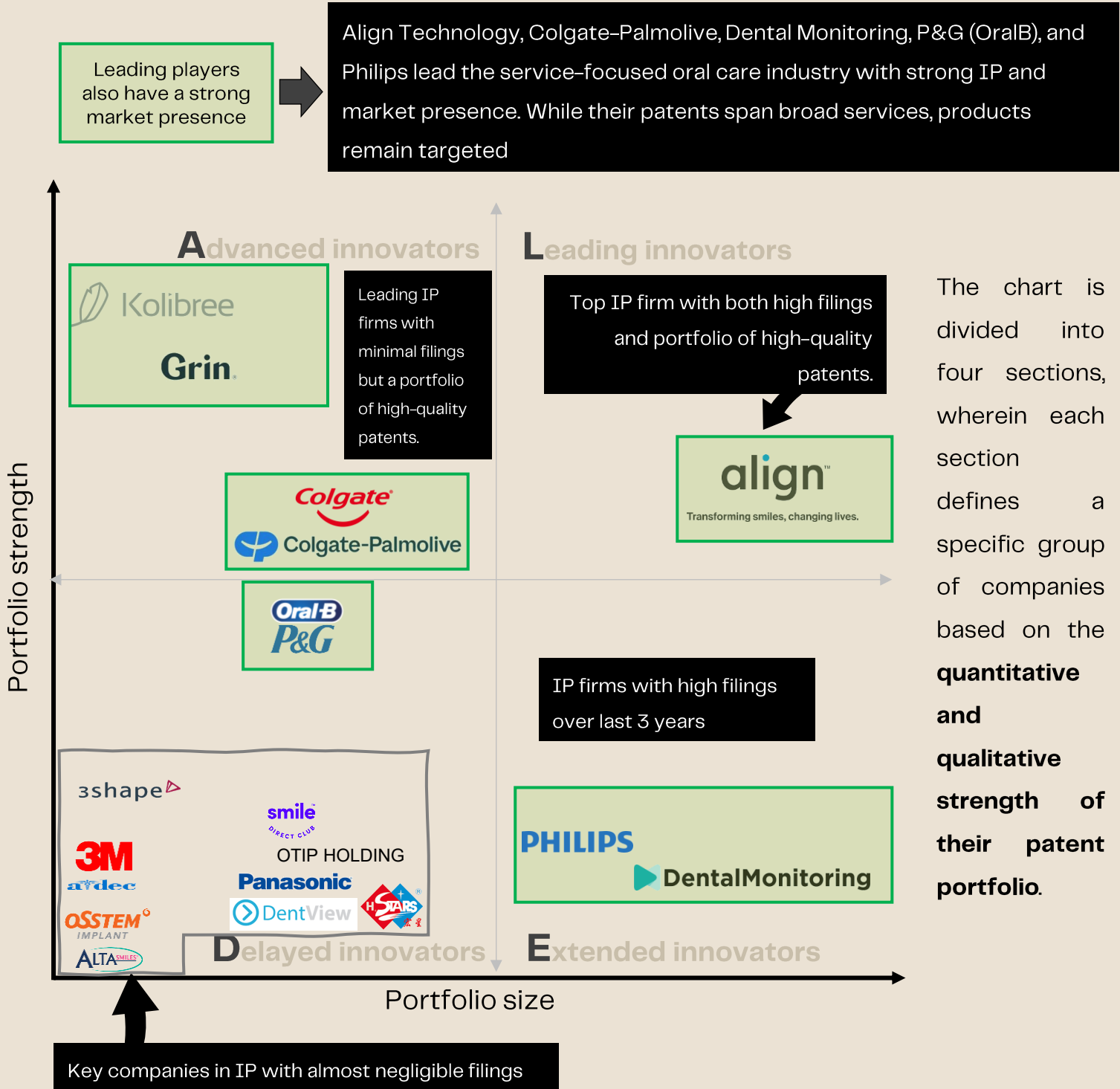
Beyond above areas, oral care companies are **exploring subscription-based services, smart wearables as service, and at-home treatments services**—driving a shift toward personalized, accessible, tech-driven oral care services that integrates seamlessly into daily life and supports remote health monitoring.

How top players patent portfolios have evolved over time?



Technology LEADerboard chart™

IP Overview



FAQs

- ✓ What key technologies are driving advancements in service-focused oral health?
- ✓ How are smart technologies being integrated into service offerings?
- ✓ Which emerging digital tools are enabling personalized oral care services?
- ✓ How is AI being used to improve dental diagnostics, treatment planning, or patient engagement?
- ✓ What role does telehealth/teledentistry play in expanding access to oral care?
- ✓ Which companies hold the most patents related to digital oral health services or dental technologies?
- ✓ What region-specific regulatory challenges or market opportunities exist?
- ✓ Which industries are investing in or collaborating on oral care innovations?
- ✓ What service offerings currently exist across different brands and regions?
- ✓ How can new entrants differentiate and establish a strong market presence?
- ✓ Which country is likely to produce the next emerging service oriented oral sector in this space outside of the U.S.?
- ✓ Which academic institutions are actively researching service innovations in oral care or are open to collaboration?
- ✓ What recent market activities, partnerships, or acquisitions stand out in the oral care domain?
- ✓ How is patent strength evaluated based on industry-focused parameters?
- ✓ What are the emerging technology trends in oral care beyond traditional oral care solutions?
- ✓ Can release/ delivery agents or functional ingredients enhance user experience or health impact?
- ✓ How are oral care providers tailoring services for different emotional states (e.g., anxiety-free dentistry, confidence-boosting aesthetic care)?
- ✓ What role do digital twins or virtual simulations play in dental education or patient modeling?
- ✓ How do oral services or products interact with the gut or oral microbiome?
- ✓ What ongoing clinical trials are exploring new service delivery models in oral care?
- ✓ Which technologies are being used to enhance specific product attributes like improving oral health monitoring efficiency?



Do you want to see a complete report answering all the above questions along with other essential insights?



Then, you may set up a demo of our complete report by writing to us at info@icurious.com or call at +1-(339)-237-3075 (USA) | +91-(988)-873-2426 (India)

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