

Haleon makes oral-health push in China as other Western brands falter

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LONDON, (Reuters) — Haleon (HLN.L), is stepping up its Chinese expansion, pushing into second- and third-tier cities and tailoring its gum-health products to local tastes, aiming to succeed where many Western consumer brands have struggled.

Sluggish demand and fierce competition have hit Western heavyweights from BMW (BMWG.DE), to Pernod Ricard (PERP.PA), and Nike (NKE.N), which all reported weaker China sales last year.

But Haleon, helped by strong growth in Sensodyne toothpaste, is doubling down with a 65 million pound (\$87 million) investment in a new oral-health plant in Shanghai. CEO Brian McNamara says the goal is to take its Parodontax brand into more than 30 cities by the end of 2027.

“For us, China’s an incredible market,” he told Reuters, citing mid-teens growth for Sensodyne and an 860 million-pound gum-health market.

“Over 70% of consumers in China suffer from gum health issues,” McNamara said. “We have a product to address it. There’s a clear consumer need.”

SWEETER FLAVOUR, FOAMIER TOOTHPASTE

China accounts for about 10% of Haleon’s 11-billion-pound business and nearly 13% of the \$59 billion global oral-health market, which Mordor Intelligence expects to reach about \$80 billion by 2031.

Haleon relaunched Parodontax in China in late 2024 after an unsuccessful attempt around five years ago, Jayant Singh, global head of oral health, told Reuters.

Now in 10,000 outlets across 19 cities, the product has been tailored to Chinese tastes with a sweeter, more fragrant flavour, a foamier brushing feel and glossier packaging.

“It’s these minor nuances that you need to put into your mix to really drive acceptance,” Singh said.

Sensodyne, Haleon’s largest brand, is used by around 11% of Chinese households, Singh said, well behind local leader Yunnan Baiyao, which Haleon estimates at 29.8%.

Some Western firms are scaling back in China. Starbucks (SBUX.O), opens new tab in November sold control of its China operations to Boyu Capital after weak sales, and Nike is resetting its China strategy after successive quarterly sales declines.

Haleon, by contrast, last year bought the Chinese government out of its local joint venture for about 700 million pounds.

McNamara joined British Prime Minister Keir Starmer’s January trip to China and said meetings with senior regulators were valuable.

“We’ve found the Chinese government very supportive of what we’re trying to do,” he said.

(\$1 = 0.7507 pounds)