

BODYCARE – THAI CONSUMER – 2020

Unlock the potential of bodycare by facilitating emotive conversations, serving the underserved needs and reanimating the category excitement.



A Mintel Analyst, Global Analyst



Report Content

EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

Market context

- The static bodycare market holds back category growth
 - Graph 1: number of body, hand, and footcare product launches. Jul 2017-Jun 2020
- Niche body part products suggest growth potential

What consumers want and why

- Consumers want: the right skin benefits
 - Graph 2: satisfaction with the effectiveness of bodycare products by age group, April 2020
- Consumers want: solutions specific to different body parts
- Consumers want: exciting textures

Opportunities

- Address holistic bodycare with self-love empowerment
- Break away from generic hydrating claims
- Introduce new textures with suitable skin benefits

Competitive landscape

- Market activities

Mintel predicts

- Thai bodycare faces a short-term setback but will recover by summer 2021
- The marketing mix - 4Ps

KEY TRENDS

- What you need to know
- Thai bodycare market is small with slow growth
 - Graph 3: bodycare and facial care retail market values in million US dollars, 2013-2022
- Declining body, hand and footcare launches
 - Graph 4: skincare launches by subcategories, Jun 2017-May 2020
- Thai bodycare trails behind other leading Asian countries
 - Graph 5: bodycare launches, Jun 2017-May 2020
- Spotlight on the hydrating and natural sensory

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- Graph 6: top 10 beauty enhancing claims in bodycare, Jun 2017-May 2020
- Graph 7: top 10 claims in bodycare, Jun 2017-May 2020
- Lotion texture's throne is shaken
 - Graph 8: bodycare launches by texture, Jun 2017-May 2020

KEY DRIVERS

- Facial care is full of innovations and excitement
- Breaking away from traditional lotion
- Combining textures to create a new texture
- Revealing skin is the new fashion
- Digital media powers the communication of specific body parts
- Don't shy away from taboos, or risk missing the opportunities

GLOBAL TRENDS AND HOW THEY ARE PLAYING OUT IN THAILAND

- Sense of the intense
- I decide what's best for my body
- Digital becomes the safe space to browse for solutions

CONSUMER INSIGHT

- What you need to know
- Bodycare is underwhelming
- Men and the 18-24 and 45+ years old are least excited about bodycare offerings
 - Graph 9: "I am excited about the current bodycare offering in the market" by gender, Apr 2020
 - Graph 10: "I am excited about the current bodycare offering in the market" by age, Apr 2020
- Excitement drives higher usage
 - Graph 11: bodycare product used more in the past 12 months, Apr 2020

Explore new benefit claims to meet consumers' needs

- Number one body problem is dullness
 - Graph 12: body problems experienced in the past 12 months, Apr 2020
- Consumers expect whitening/brightening benefits
 - Graph 13: bodycare product features sought after, Apr 2020
 - Graph 14: bodycare top 10 beauty enhancing claims, Apr 2019-Mar 2020
- Whitening and acne are the pinnacle problems of the young
 - Graph 15: body problems experienced in the past 12 months by age group, Apr 2020
- No right solutions, no satisfaction
- Men suffer from body acne throughout their lives

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- Graph 16: body acne experienced in the past 12 months by age group and gender, Apr 2020
- Consumers aged 45+ face ageing on body skin
 - Graph 17: sagging skin experienced in the past 12 months by age group, Apr 2020

Draw out the strengths of textures to add appeal

- Sunlight protection benefit stands out in lotion
 - Graph 18: bodycare benefits and textures association, Apr 2020
- Young consumers view lotion as the best whitening/brightening solution
 - Graph 19: lotion benefits and textures association, by age, Apr 2020
- Consumers are ready for new textures...
- ...but strengths of other textures are still unclear to be convincing
 - Graph 20: bodycare benefits and textures association, Apr 2020
- Consumers eye on milk as the whitening/brightening alternative
 - Graph 21: bodycare benefits and textures association, Apr 2020
- Consumers enjoy the unique sensory in gel but not the benefit it provides
 - Graph 22: bodycare benefits and textures association, Apr 2020
- Consumers do not associate skin tightening with any particular textures
 - Graph 23: bodycare benefits and textures association, Apr 2020
- 35+ find oil texture to be the hero of hydrating
 - Graph 24: no benefits associated with oil texture, by age, Apr 2020
 - Graph 25: moisturising benefit associated with oil texture, by age, Apr 2020

Expand into other body parts

- Growth opportunities lie outside of just body
 - Graph 26: bodycare product types used in the past 12 months, Apr 2020
- Body dryness priority shifts with age
 - Graph 27: specific body parts problems experienced in the past 12 months, by age group, Apr 2020
- Intimate care for the body conscious
 - Graph 28: intimate care products used in the past 12 months, Apr 2020
 - Graph 29: breast care products used* in the past 12 months, Apr 2020
- Men care about their topless appearance
 - Graph 30: nipple care products used in the past 12 months, Apr 2020
- Consumer insight in summary

MARKET APPLICATIONS

- Opportunities: key focus area

White space opportunities in addressing specific body parts

- Start with education to cultivate a routine

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- Encourage consumers to take care of different body parts
- Growth opportunities lie outside of just body
- Create awareness for hand dehydration
- The long-term potential of hand cream lies beyond just hydration
- Hand washing and handcare go hand in hand
- Make digital space the haven of intimate talk
- Embrace body positivism to start the conversation
- Case study: Nipplets lingerie
- Case study: Two L(l)ps
- Case study: Bond

Opportunities in benefits

- Engage young consumers with the right benefits
 - Graph 31: body problems experienced in the past 12 months, Apr 2020
 - Graph 32: top 10 beauty enhancing claims in bodycare, Jun 2019-May 2020
- Continue whitening/brightening care despite staying indoor
- Leverage facial skincare success to body
- Replicate facial care's whitening-winning formula
- Deliver precise and powerful body acne solution with built-in applicator
- Twist the soothing ingredients to extend to acne care

Opportunities in texture

- Use milk to improve both skin tone and quality
- Mirror skin tightening image from facial essence to body
- Position body oil as the wellbeing bodycare solution for the 35+
- Create new texture combinations with a story
- Leverage the trending bodycare texture combinations
 - Graph 33: texture combination percentage of bodycare lotion, Jun 2017-May 2020
 - Graph 34: texture combination percentage of bodycare gel, Jun 2017-May 2020
- Play up the benefit of different textures
- Take inspiration from the food industry
- Market applications in summary

Who's innovating

- Specific body part care for women
- Specific body part care for men

Global innovations

- The power of product reviews: from body exfoliant to being the local's favourite body acne solution
- Sleep aid and de-stressing claims in bodycare

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- Innovative body oil launches
- Breast massage oil to prevent breast cancer
- Handcare with protection against elements

BOARDROOM CHECKLIST

- Boardroom checklist

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