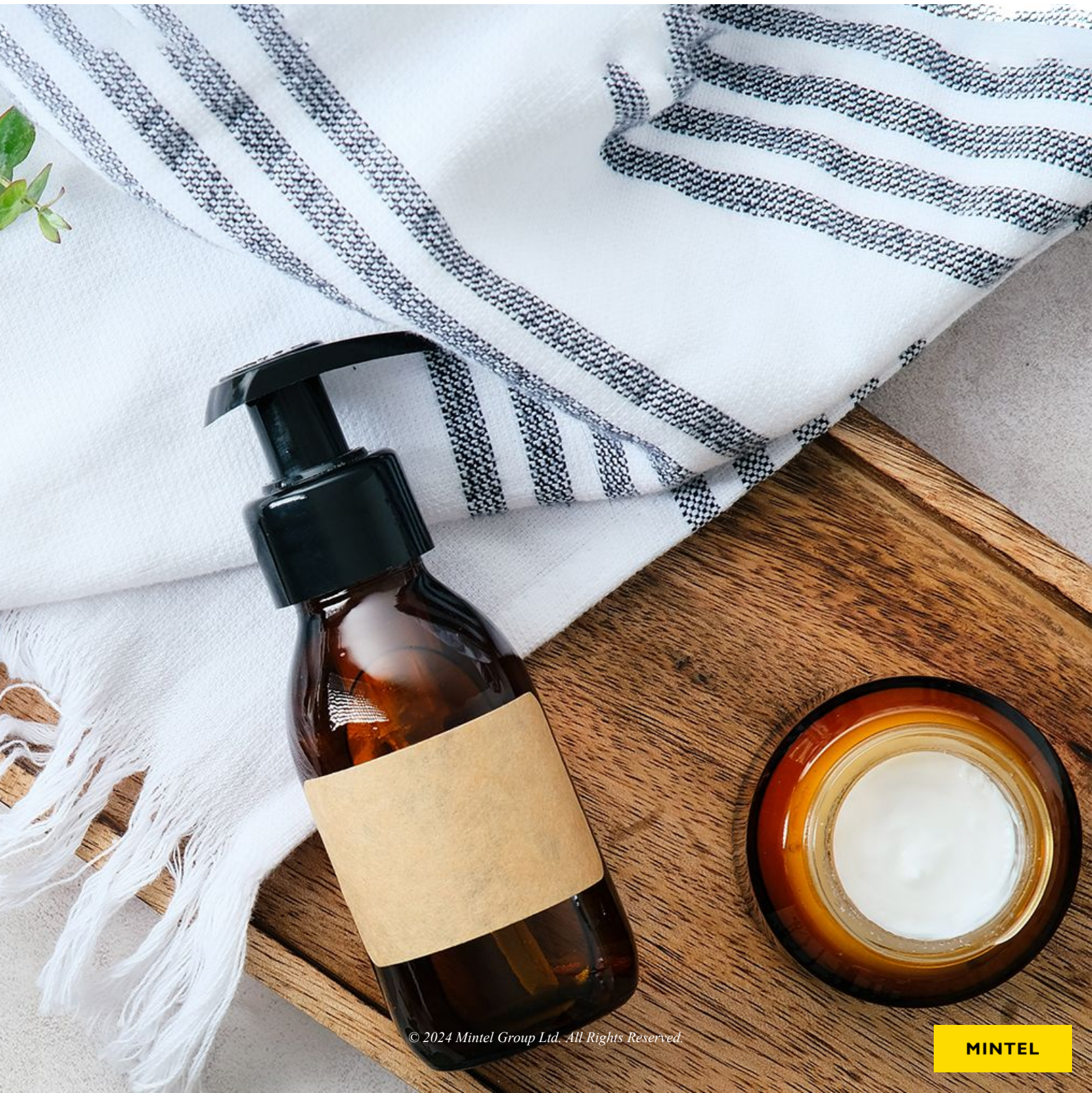


CURATIVE BEAUTY – THAI CONSUMER – 2022

As the demand for quick acne treatments has been put in the spotlight due to the pandemic, highlight efficacy to keep the momentum of facial skincare's growth.



A Mintel Analyst, Global Analyst



Curative Beauty - Thai Consumer - 2022

This report looks at the following areas:

- The impact of COVID-19 on facial skincare and the demand for curative solutions
- The gap between consumers' curative demands and the facial skincare market's current offerings
- What product solutions consumers perceive to be the most effective in treating skin problems
- The difference between what consumers with few and many skin problems prioritise when purchasing facial skincare
- Opportunities to dial up efficacy claims in facial skincare, and hence curative solutions



As the demand for quick acne treatments has been put in the spotlight due to the pandemic, highlight efficacy to keep the momentum of facial skincare's growth.

Overview

The daily mask-wearing lifestyle introduced by the pandemic led consumers to develop maskne – problems of skin sensitivity and acne breakouts. Because this was unprecedented, consumers learned how to cope and actively sought remedies to best cure these persistent maskne problems.

Efficacy has become the number-one criteria when purchasing facial skincare (56%) as consumers want to get rid of problems quickly. 62% of Thai consumers perceive serum to be the most effective skincare format, which accelerates the launch of serum to the point that it overtakes the pre-existing, long-established cream format.

Still, whitening and brightening claims dominate beauty-enhancing claims in Thai facial skincare. Anti-acne, conversely, remains static at 14% of facial skincare launches in the past

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three years. This implies underleveraged anti-acne claims and an overemphasis on enhance beauty within the industry.

Use maskne as an entry point for consumers to treat their acne, especially for young men whose primary skin problem is acne. Offer efficacious acne treatment serum that they can afford in sachet format as a gateway to recruit them into the facial skincare category.

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Report Content

EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

Key issues covered in this Report

- Overview
- The impact of COVID-19 on curative beauty in Thailand
- Serums are taking over as the new curative solution
 - Graph 1: top five formats in face/neck care, 2019-22
- Efficacy equates curative power
 - Graph 2: treatment methods perceived to be effective in treating skin issues, 2022
- Simple acne treatment for young men
 - Graph 3: facial skincare purchasing criteria by consumers who experienced one or two skin problems, 2022
- Tackle multifaceted skin problems with holistic health and skin glow

Mintel predicts

- The outlook for curative beauty in Thailand
- Marketing mix

KEY TRENDS

- What you need to know

Rise of active ingredients to enhance curative power

- Natural remains dominant while vitamin/mineral fortified claims are rising
 - Graph 4: top 10 claims in facial skincare*, 2019-22
- Active ingredients are highlighted as support to superior efficacy

Skin problem treatment is needed, but the attention shifts to eco-ethical claims

- Pandemic-induced maskne pushes for curative solutions
- Attention shifts to being user- and Earth-friendly
 - Graph 5: top 10 claim categories in facial skincare*, 2019-22
- The brightening claim is growing and overshadowing other claims
 - Graph 6: top 10 beauty-enhancing claims in facial skincare*, 2019-22

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- Serum rises to trump cream

- Graph 7: top five formats in face/neck care, 2019-22
- Graph 8: selected formats launched by market, 2021-22
- Efficacy is the hero when it comes to serum

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- What you need to know

Perceived efficacy – what consumers believe to be effective solutions in treating skin issues

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 - Graph 9: treatment methods perceived to be effective in treating skin issues, 2022
- Serum's superior efficacy gains popularity among younger consumers
 - Graph 10: skincare formats perceived to be effective in treating skin issues, 2022
- Natural is king – both safe and effective
 - Graph 11: skincare ingredients perceived to be effective in treating skin issues, 2022

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 - Graph 13: facial skincare purchasing criteria by consumers who experienced one or two skin problems, 2022
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 - Graph 14: skin problems of consumers who experienced one/two skin problems, 2022
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 - Graph 15: beauty ingredient awareness gap between consumers who experienced one/two skin problems and the total sample, 2022

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 - Graph 16: strong agreement towards skin problems by consumers who experienced more than six skin problems, 2022
- Skin unevenness is their unique concern
 - Graph 17: skin problems of consumers who experienced more than six skin problems, 2022
- Seeking efficacy claims backed up by active ingredients

Curative Beauty – Thai Consumer – 2022

- Graph 18: facial skincare purchasing criteria by consumers who experienced more than six skin problems, 2022
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 - Graph 19: skincare formats perceived to be effective in treating skin issues by consumers who experienced more than six skin problems vs the total, 2022
- Cellular-level peptide and ceramide are deemed effective
 - Graph 20: beauty ingredient awareness of consumers who experienced more than six skin problems vs total sample, 2022
- It is more than just facial skincare that can help with skin issues
 - Graph 21: treatment methods perceived to be effective in treating skin issues by consumers who experienced more than six skin problems vs the total, 2022

MARKET APPLICATIONS

- Opportunities: key focus areas

Amp up curative efficacy

- Hyper-personalised modular offers to suit every skin need
- Enhance the power of curative beauty through customised skincare
- Grow other formats with even more efficacious propositions
- Natural and science go hand in hand

Keep it simple with consumers who have minimal skin issues

- Provide sachet formats to tackle acne quickly and affordably
- Educate on and promote skin positivity
- Leverage cica and ceramide as effective natural ingredients
- Skipcare is the new skincare

Build overall healthy and glowing skin solutions for consumers with multifaceted skin issues

- Emphasise overall healthy and glowing skin solutions
- Venture out of the topical beauty space
- Achieve optimum efficacy at a cellular level
- Bring clinical-grade technology back home

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