

FABRIC CARE – THAI CONSUMER – 2022

Navigate fabric care post-pandemic by sustaining antibacterial momentum, leveraging cross-category fragrance trends and adding value to prevent category decline.



A Mintel Analyst, Global Analyst



Fabric Care - Thai Consumer - 2022

This report looks at the following areas:

- Key trends that are impacting the fabric care category in Thailand
- Changes in consumer laundry behaviour during the COVID-19 pandemic outbreak
- Consumers' fabric care purchasing criteria
- Consumers' willingness to pay more for selected fabric care features
- Opportunities and applications to drive the fabric care category in Thailand



Navigate fabric care post-pandemic by sustaining antibacterial momentum, leveraging cross-category fragrance trends and adding value to prevent category decline.

Overview

The COVID-19 pandemic raised consumers' hygiene concerns and gave a boost to detergent launches and antibacterial claims in Thailand. **50%** of Thai consumers did their laundry more often than during the pre-pandemic period and this figure goes up to **68%** amongst families with children.

However, this hygiene tailwind stopped as the pandemic started to subside in 2022. In its place, inflation has arisen as the new crisis. **29%** of Thai consumers strongly agree that inflation has negatively impacted their ability to spend and **25%** are looking for lower prices in detergent and fabric softener.

This financial crisis is prompting consumers to trade down. Brands may be tempted to offer heavier price promotions and race towards the bottom just to maintain brand loyalty.

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However, while cutting prices is a good tactic to fight through financial pressure, it destroys the category value in the long run.

Brands can try to sustain the fabric care category by injecting value to make consumers feel they are getting more while paying the same amount. Adding convenience (eg wrinkle-free) and highlighting how eco-friendly claims also help consumers save money (eg saving on packaging costs from refill stations) might offer success with the right communication.

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Report Content

EXECUTIVE SUMMARY

- Mintel's perspective

Key issues covered in this Report

- Overview
- Add value with convenience post-pandemic
 - Graph 1: environmentally friendly, ease-of-use, and economy claims on fabric care launches, 2017-22
- Respond to the extra hygiene concerns of families with children by offering superior antibacterial yet safe solutions
- Leverage trends in beauty & personal care to grow fabric softener
- Make products more price-worthy with added value
 - Graph 2: appealing claims for Low Price Seekers, 2022

Mintel predicts

- The outlook for the fabric care category in Thailand
- The marketing mix
- Quick download resources

KEY TRENDS

- What you need to know

Key trends

- Fabric softener resumes activity while detergent shows sign of slowdown
 - Graph 3: fabric care launches, by sub-category, 2017-22
- Antibacterial claims grow slowly while odour-neutralising claims might pick up
 - Graph 4: odour-neutralising and antibacterial claims in fabric care launches, 2017-22
- Inflation puts pressures on the value equation
 - Graph 5: environmentally friendly, ease-of-use and economy claims in fabric care launches, 2017-22
- Non-traditional fragrances are emerging in fabric care
 - Graph 6: top five fragrances in fabric care, 2017-22

GLOBAL TRENDS AND HOW THEY ARE PLAYING OUT IN THAILAND

- Save money; save the world
- From beauty to homecare
- Scent of pleasure

CONSUMER INSIGHTS

- What you need to know

Fabric hygiene intensifies in families with children

- Washing clothes more frequently to ensure hygiene safety
 - Graph 7: laundry activity compared to prior to COVID-19 outbreak, 2022
- Separating extra dirty clothes creates opportunities for specialised care
 - Graph 8: machine wash laundry activities performed by consumers who live with partner and children, 2022
- Consumers have high hygiene expectations from detergent
 - Graph 9: detergent selection criteria, 2022
- Seeking antibacterial efficacy, while natural ingredients are also appreciated
 - Graph 10: detergent selection criteria, any rank, by consumers who live with partner and children, 2022

Beauty receptivity opens room for new fragrances

- Fragrance is the key driver of fabric softener
 - Graph 11: fabric softener selection criteria, 2022
- From skincare to fabric care
 - Graph 12: willingness to pay more for fabric care products with skincare functions, 2022
- Target consumers aged 25-34 with de-stressing propositions
 - Graph 13: consumers regularly feeling burnout, by age group, 2021
- Young consumers are interested in dessert fragrances but not yet willing to pay for it
 - Graph 14: age group profiles, by willingness to pay more for fabric care with a scent inspired by dessert, and the Escapism segment, 2022

Seeking cost-saving solutions from laundry

- Looking for low ticket prices to stay afloat
- Risk of trading down due to low category engagement and limited budgets
- Sustainability claims that can also lend financial savings are appealing
 - Graph 15: appealing claims, by Low Price Seekers, 2022

MARKET APPLICATIONS

- Opportunities: key focus areas

Retain detergent growth with families with children

- Dial up antibacterial claims to stand out from the crowd
- Promoting fabric care regimens for better efficacy
- Creating specialised antibacterial solutions
- Feature natural ingredients to reassure safety

Leverage beauty propositions with targets' lifestyles

- Assert fabric care's role in beauty
- Make long-lasting fragrance tangible
- Promoting de-stressing fabric care for first jobbers
- Visualise scent image with young consumers' lifestyles

Add value to fabric care with convenience and sustainability

- Enhance value with convenience
- Offer refill value without sacrificing convenience
- Add individual value to sustainability
- Nurture brand loyalty with point programs

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