

# FABRIC CARE – THAI CONSUMERS – 2020

Drive stronger category growth by highlighting fabric hygiene during the pandemic and exploring premium angles beyond fragrance.



A Mintel Analyst, Global Analyst



# Report Content

## EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

### Market context

- The impact of COVID-19 on fabric care
- The Thai fabric care market grew thanks to premium fragrance
- Antibacterial detergent gains traction from COVID-19
  - Graph 1: worry about the risk of being exposed to COVID-19, March-September 2020
- Fabric care now overly focuses on single-person households

### What consumers want and why

- Families want: one solution for every family member
- Consumers want: extra fabric hygiene
- Consumers want: new premium experiences

### Opportunities

- Simplify complex family laundry with all-in-one claims
- Unlock the fabric wash potential in the 'next normal'
- Stay competitive in premium fabric softeners

### Competitive landscape

- Market activities
- The outlook for Thai fabric care
- The marketing mix

### Mintel predicts

- Stabilise fabric care to unlock potential

## KEY TRENDS

- What you need to know
- Fabric care market forecast to have slow growth
  - Graph 2: fabric care market size, 2013-22
- Automatic detergent drives the category dynamic
  - Graph 3: fabric care launches by sub-category, Sep 2017-Aug 2020
- Automatic detergent grew with natural and antibacterial claims

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- Graph 4: top 10 claims in automatic detergent, Sep 2017-Aug 2020
- Fabric softener moves from an absence of bad smells to the inclusion of premium fragrances
  - Graph 5: top 10 claims in fabric softener, Sep 2017-Aug 2020
- The established audience of fabric care – mothers
- Fabric care shifts to target individuals
- Convenience innovation has made its way to Thailand

### KEY DRIVERS

- Fear of COVID-19 lingers
  - Graph 6: worry about the risk of being exposed to COVID-19, March-September 2020
- Holistic hygiene practices were promoted
- Premiumising with fragrance
- Fragrance war intensifies with the pressure to differentiate
- The number of single-person households is booming but the majority is still family households

### GLOBAL TRENDS AND HOW THEY ARE PLAYING OUT IN THAILAND

- Higher level of hygiene
- Finding a shortcut
- Sense of cleanliness

### CONSUMER INSIGHTS

- What you need to know

#### Non-linear laundry in the family

- Laundry is not individualised in families
  - Graph 7: person mainly responsible for laundry, August 2020
- The more members, the more complications
  - Graph 8: laundry tensions, August 2020
- Families with kids have more laundry steps
  - Graph 9: repertoire analysis of laundry steps performed in machine wash, August 2020
  - Graph 10: machine wash laundry steps taken, August 2020
- Laundry needs to be washed more frequently for families
  - Graph 11: laundry frequency, August 2020
- Fabric care products have to be compromised to please everyone

#### Enhance cleaning with antibacterial detergent

- Antibacterial is a great support to basic hygiene

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- Graph 12: detergent purchasing criteria, August 2020
- Who looks for antibacterial claims?
- Antibacterial needs derive from active lifestyles and repeated wear
  - Graph 13: laundry tensions and antibacterial purchase criteria, August 2020

### **Fragrance has mainstreamed within fabric softener**

- Scent trumps soft touch in fabric softener
  - Graph 14: fabric softener purchasing criteria, August 2020
- Convenient and unique innovations justify a premium
- Consumers look for functional fragrances
- Consumer insights summary

## **MARKET APPLICATIONS**

- What you need to know

### **Simplify complex family laundry with all-in-one benefits**

- Families weigh their product choice to fit everyone's needs
- Consumers are willing to pay to reduce fabric routine complications
- Redefine convenience with all-in-one claims
  - Graph 15: fabric care launches with an "all in one" claim\*, Sep 2017-Aug 2020
  - Graph 16: top three convenience claims in fabric care, Sep 2017-Aug 2020
- Do more with just one product
- Highlight how a product can serve multiple family members and occasions

### **Unlock fabric wash potential in the 'next normal'**

- Raise attention to bacteria adherence on clothing
- Increase pre-treat steps to kill bacteria between laundry cycles
- Proper face mask cleaning solutions are greatly needed
- Bacterial infection prevention adds new value to antibacterial claims

### **Stay competitive in premium fabric softener**

- Premiumise with elevated convenience
- Add value via beauty and personal care technologies
- Leverage fragrance's visuals and stories to differentiate
- Gender paradigm shift leads to the rise of unisex fragrances
  - Graph 17: unisex fragrance launches, 2015-19
- Expand the user base with unisex scents
- Explore different mood-enhancing angles
  - Graph 18: mood-enhancing claims\* in beauty and personal care launches, 2017-19

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- Market applications in summary

### Who's innovating

- Hormone stimulation to enhance good moods
- On-the-go emergency fabric wipes

### Global innovations

- Clean and care essences from beauty to fabric care
- Family members can now easily help out with laundry
- Beauty lingo translates to fabric care
- Ingredients from beauty and personal care that spill into fabric care
- Emotive fragrance in fabric care
- Antibacterial innovations in fabric care
- Antiviral innovations in fabric care

### BOARDROOM CHECKLIST

- Boardroom checklist

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