

# FUNCTIONAL BEAUTY INGREDIENTS – THAI CONSUMER – 2024

Highlight unique functions of newly introduced ingredients while technologically enhancing classic hero ingredients to boost their appeal. Additionally, promote skin health by leveraging probiotics.



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# Functional Beauty Ingredients – Thai Consumer – 2024

## This report looks at the following areas:

- Key trends in functional ingredients in beauty and personal care
- Consumer awareness of functional beauty ingredients
- Consumer interest in ingredient feature upgrades
- Consumer attitudes towards functional ingredients
- Opportunities for brands to promote skincare launches with functional beauty ingredients

## Overview

The Thai beauty market is undergoing a significant transformation, driven by consumer preferences for products that offer tangible skin health benefits. Hydration, brightening and enhancing skin barrier function are the top priorities. The popularity of functional ingredients such as hyaluronic acid, ceramides and botanical extracts is rising, alongside the growing interest in probiotics for skin and gut health. Consumers are increasingly prioritising effectiveness and safety, demanding greater transparency about ingredients and their benefits. Advanced technologies are being leveraged to improve the efficacy and stability of well-known ingredients.



Highlight unique functions of newly introduced ingredients while technologically enhancing classic hero ingredients to boost their appeal. Additionally, promote skin health by leveraging probiotics.

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## Report Content



### EXECUTIVE SUMMARY

- Mintel's perspective

#### Key issues covered in this Report

- Overview
- Outlook of functional beauty ingredients in Thailand
- The awareness of probiotics is soaring among Thai consumers
  - Graph 1: functional beauty ingredient awareness, 2020-24
- Focus consumers on one ingredient and its standout benefit
  - Graph 2: top five purchase consideration factors of beauty products, 2024
- Upgrade familiar ingredients with cutting-edge technology
  - Graph 3: interest in ingredient features, consumers interested in well-known ingredients vs those who are not, 2024
- Drive probiotics use by creating new skincare routines
  - Graph 4: skin issues, total vs probiotics users, 2024

### KEY TRENDS AND MARKET FACTORS

- What you need to know

#### The rising demand for skin health has spurred a boom in functional ingredients

- Beauty launches in Thailand focus on skin-health-related claims
  - Graph 5: the top five beauty-enhancing claims in beauty launches, 2019-24
- Skin health ingredients are more pronounced in brightening products
- Ingredient trend: functional chemical compounds
  - Graph 6: the top 10 functional ingredients with the highest growth in beauty launches, 2019-24
- Case study: The Ordinary's skin barrier 'seal' concept
- Ingredient trend: botanical extracts
  - Graph 7: the top 10 botanical extracts in beauty launches with the highest growth, 2019-24
- Ingredient trend: fermented and protein ingredients
  - Graph 8: the top 10 fermented and protein ingredients in beauty launches with the highest growth, 2019-24

#### Ingredient focus: probiotics

- The awareness of probiotics is soaring among Thai consumers
  - Graph 9: functional beauty ingredients awareness, 2020-24
- Probiotics' skin benefits are well established in Thailand
- While beauty launches featuring probiotics are well established in the West, they are still very limited in Thailand

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- Graph 10: beauty launches with probiotics claims, 2019-24
- Graph 11: beauty launches with probiotics claims, by region, 2019-24
- Beauty launches with probiotics come with skin-barrier-strengthening benefits
- Probiotics have evolved from offering general benefits to targeting specific skin concerns more effectively

## Thailand is a results-driven beauty market

- Well-established ingredients have gained trust through their effectiveness
- The interest in retinol is rapidly gaining momentum, strengthened by its legendary reputation
  - Graph 12: searches for selected functional beauty ingredients, 2019-24
- Global brands harness advanced tech to elevate established ingredients like retinol in modern marketing strategies
- Local brands promote ingredient transparency while highlighting effectiveness
- Beauty influencers are increasingly delving into detailed discussions about ingredients

## WHAT CONSUMERS WANT AND WHY

- What you need to know

### Empower choices with ingredient insights

- Substance over source: Thai consumers welcome diverse ingredients, prioritising efficacy over specific ingredient inclusion
  - Graph 13: the top five purchase considerations in beauty products, 2024
- Consumers need clear and comprehensible information about beauty ingredients, particularly new ones, to make informed choices
- Boost consumer understanding by spotlighting a single benefit of an individual ingredient
- Younger generations turn to modern media for ingredient information, while older counterparts rely on traditional sources
  - Graph 14: the top five beauty ingredient information sources, by generation, 2024
- Combine science and entertainment to make beauty ingredient info accessible and engaging
- Highlight ingredients' performance on packaging
- Thai consumers trust user reviews and brand sites for beauty insights
  - Graph 15: beauty ingredient information sources that consumers perceive to be reliable, 2024
- Consolidate UGC to expedite the decision-making process
- Leverage AI to provide personalised beauty product recommendations based on ingredients
- In summary: effective ingredient communication strategies for beauty brands

### The use of trusted ingredients for innovative upgrades

- Consumers seek familiar, trusted ingredients
- The demographic profile of consumers interested in well-known ingredients
- Consumers expect ingredients to penetrate deeply to ensure effectiveness
  - Graph 16: interest in ingredients that are easily absorbed for better skin penetration, consumers interested in well-known ingredients vs those who are not, 2024
- Leverage high tech to enhance ingredient penetration into deeper skin layers

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- Highlight an ingredient's potency through its size and concentration
- Elevate well-known ingredient efficacy with advanced technology
  - Graph 17: ingredient features interest, consumers interested in well-known ingredients vs those who are not, 2024
- Emphasise advanced ingredient delivery systems
- Enhance vitamin C efficacy preservation with cold-pressed extraction
- More is more: the more ingredients there are, the more effective the product is
  - Graph 18: strong agreement that products with multiple well-known ingredients are more effective than those with a single ingredient, consumers interested in well-known ingredients vs those who are not, 2024
- Upgrade familiar ingredients with unique combinations
- Consumers still rely on product packaging for detailed ingredient information, despite the rise of social media
  - Graph 19: information sources of beauty ingredients, all consumers vs those interested in well-known ingredients, 2024
- Prominently feature popular, sought-after facial skincare ingredients on packaging
- Beauty personas that will engage with premium, classic functional beauty ingredients
- Ideating product concepts with Mintel Leap: for consumers interested in well-known ingredients

## The untapped potential of probiotics in Thai skincare

- Consumers' awareness of and interest in probiotics are rising, yet market options remain limited
  - Graph 20: functional beauty ingredients with growth potential, 2024
- Consumers' awareness of and interest in probiotics are rising, yet market options remain limited
- The demographic profile of probiotic beauty product users
- Probiotic users report experiencing persistent skin issues such as acne and enlarged pores
  - Graph 21: skin concerns, 2024
- In the beauty industry, probiotics users are early adopters
  - Graph 22: beauty product categories that consumers are willing to pay more for, total vs probiotics users, 2024
- Link the skin and gut microbiomes for a synergistic effect
- Introduce new skin treatment approaches using bacteriophages
- Control the skin microbiome with an ideal pH and bio-succinic acid
- Create skin-health-strengthening routines with products that promote skin microbiome and barrier health
- The beauty persona for probiotic skincare

## APPENDIX

- Abbreviations
- Generations
- Consumer research methodology
- Index calculation
- TURF analysis
- Social data research methodology

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