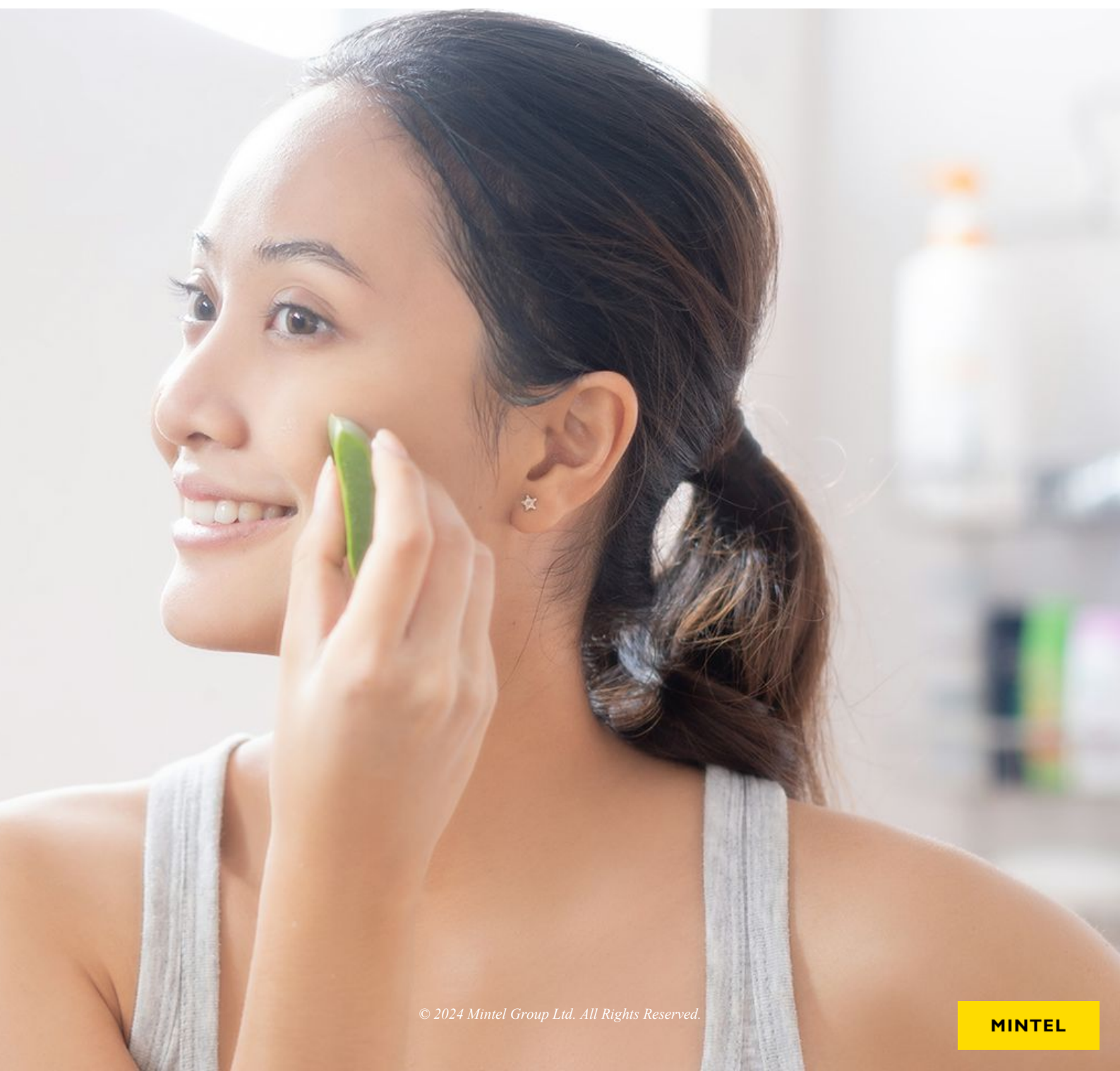


# NATURAL AND ORGANIC SKINCARE – THAI CONSUMER – 2021

Align with Thai consumers' clean beauty values by tapping into the eco-ethical claim and incorporating science for better efficacy.



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 natural and organic skincare
- Social movement-led consumption

### What consumers want and why

- Consumers want: clean beauty
  - Graph 1: association with natural and organic skincare, January 2021
- Consumers want: gentle, yet effective, skincare
  - Graph 2: agreement and disagreement with the effectiveness of natural and/or organic skincare products in solving skin issues, January 2021
- Consumers want: eco-ethical beauty
  - Graph 3: "It is worth spending more money on skincare products that are natural and organic"

### Opportunities

- The future of Thai clean beauty
- Amp up the science in clean beauty for Gen Z
- Clean beauty with premium proposition for Millennial lifestyles

### Competitive landscape

- New players are changing the face of natural and organic

### Mintel predicts

- The outlook for natural and organic skincare industry
- The marketing mix
- Rebuild the category to stay relevant with consumers

## KEY TRENDS

- What you need to know
- Launches in eco-sustainable skincare continue to rise
  - Graph 4: launches in natural skincare with ethical claims, May 2016-Apr 2021
- The clean lifestyle is a total wellness agenda
- Cruelty-free viral campaign sparks conversation for no-animal-testing products

# Natural and Organic Skincare – Thai Consumer – 2021

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- Education spark conversations around ethical beauty
- Sustainability is starting to become integrated in Thais' daily life
- Emotional values are playing a part in choosing natural/organic skincare
- Younger generations are the activist generation
- Beauty retailers are curating clean offerings

## KEY DRIVERS

- The pandemic heightens concern around wellness
- Animal ethics is a value close to Thais' heart
- Food trends continue to lead clean beauty direction
- Modern image helps natural and organic products appeal to young consumers
- Minimal design with a pop of colour speaks youthful aesthetics
- Natural ingredients becomes trending acne remedies for Gen Z

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

- Naturally, safer
- Value-led consumption towards external environment
- Food trends fuel the clean beauty movement

## CONSUMER INSIGHT

- What you need to know

### The clean beauty landscape

- Thailand is moving up the clean beauty scale
- "Ethical" and "sustainable" are becoming characters of natural and organic products in Thailand
  - Graph 5: association with natural and organic beauty products, January 2021
- Natural and organic consumers are shifting towards the under 35s
  - Graph 6: attitudes towards whether both natural and organic products are becoming more appealing, by age group, January 2021
- Gen Z and Millennials are more involved with sustainability
  - Graph 7: consumers who researched the environmental impact of a product before buying by age groups, March 2021
  - Graph 8: consumers who would like to see more innovative sustainability ideas from big beauty brands by, age groups, March 2021
- Values incentivise Millennials to pay more
- Thai consumers do not differentiate between natural and organic
  - Graph 9: association with natural and organic skincare, January 2021
- Safety and quality are leading motivations to use natural/organic products

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- Graph 10: top three reasons to choose to buy a natural/organic skincare product, January 2021
- Less is not more for natural and organic skincare
  - Graph 11: consumers' association with 'containing fewer ingredients' by product type, January 2021
- Natural and organic skincare match with younger skin concerns
  - Graph 12: attitudes towards whether natural and/or organic product are suitable for sensitive skin, January 2021
- Natural and organic skincare are the safe options but lack in efficacy
  - Graph 13: attitudes towards natural and organic skincare, January 2021

## Gen Z brings the brain in beauty

- Anti-acne claims correlates with natural ingredients
  - Graph 14: launches in anti-acne skincare by natural claims, May 2016-Apr 2021
- Ingredients play a huge role in Gen Z's consideration factors
  - Graph 15: natural and organic products consideration factors by consumers aged 18-24, January 2021
- Missing gap in skin issue solving ability
  - Graph 16: consumers who agree and disagree that natural and/or organic skincare products are not effective in solving their skin issues, January 2021

## Millennials are the beauty activists

- Millennials are willing to pay more for natural/organic
  - Graph 17: "It is worth spending more money on skincare products that are natural and organic"
- Thai Gen Z and Millennials are the activist generation
- Millennials prioritise exclusivity of the products
  - Graph 18: natural and organic products consideration by consumers aged 25-34, January 2021
- Consumer insights in summary

## MARKET APPLICATIONS

- Opportunities: key focus area

### Future projection of Thai clean beauty movement

- Redefine natural and organic into clean beauty
- The future of Thai clean beauty
- Start with eco-friendly packaging
- Show that brands care about animal welfare

### Amp up the science in clean beauty for Gen Z

- Western brands are offering the new segment of natural and organic beauty offerings
- Boost clean beauty efficacy with actives
- Create first impressions through clean acne remedies
- Highlight natural active ingredients

## Premium clean beauty offering

- Clean beauty with premium proposition for the Millennial lifestyle
- Tell the story behind the brand
- Take wellness under the wing of premium clean beauty
- Expand premium clean offerings to other adjacent categories

## Who's innovating

- Brisuthi - premium niche organic skincare
- ASKINS - Honest SPF
- Regionally sourced ingredients

## Global innovations

- Skincare brand for change
- Market applications in summary

## BOARDROOM CHECKLIST

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