

# NATURAL & ORGANIC SKINCARE - THAI CONSUMER - 2019

White spaces emerge in the skincare market for new natural and organic products to grow and expand.



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# Report Content

## EXECUTIVE SUMMARY

- What you need to know
- The future of Thailand's natural skincare market
- Thai natural & organic beauty is ready for expansion and premiumisation
- Naturals segment into new white spaces
- Hero products are the bedrock of naturals but to grow...
- Thai consumers show definitive growing needs towards natural and organic
- The future of Thailand's natural skincare market

## KEY TRENDS

- What you need to know

## KEY DRIVERS

- Facial skincare market in Thailand is on the rise
- Social media drives motivation to "keep up appearances"
- From food to beauty: an easy transfer of benefits
- Take an active lead in sustainability
- Beauty trends are driven by outside factors

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

- Thailand is on the move for the Clean movement
- Free-from claims show a similar upward trajectory
  - Graph 1: Clean beauty launches, % by claim category, Sep 2014-Aug 2019
- Thailand is starting out on the clean journey
- Future direction for beauty for products

## CONSUMER INSIGHT

- What you need to know
- Who are natural-inclined consumers?
- Older females form the majority of natural-inclined consumers
  - Graph 2: "I intend to use more/start using natural products because it is safe for my skin", Aug 2019
- Education is key to driving natural and organic

## Natural & Organic Skincare - Thai Consumer - 2019

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- Young female consumers: unsophisticated but could be converted
  - Graph 3: "I know the difference between natural and organic", Aug 2019
- The affluent are first to explore natural offers
  - Graph 4: Income levels of natural-inclined consumers, Aug 2019
- Push the "Natural is Superior" message
- Think Rice, Think Thailand campaign brings local staple food item closer to people
- Hero products have established the natural market...
  - Graph 5: Penetration of products among consumers who are interested in ingredients lists, Aug 2019
  - Graph 6: Penetration of products among consumers who intend to use more or start using naturals, Aug 2019
- ...Now it's time to expand it into under-penetrated categories
  - Graph 7: Skincare product purchases by those who intend to use/start using more natural skincare, August, 2019
- Facial skin concerns are a gateway to NPD
- Facial skin concerns are a gateway to NPD
  - Graph 8: Facial skin concern, Aug 2019
- Different regions suffer different skin concerns
  - Graph 9: skin conditions by regions, August, 2019
- Regional skin issues shape consumer needs
- Natural-inclined consumers are heavy sufferers of skin conditions
- Product launches also don't address acne and skin issues well
  - Graph 10: Claims in skincare launches, 2017-19
- Explore anti-acne bodycare products to cater to demands
  - Graph 11: Natural skincare product usage for consumers who go to the dermatologist for specific concerns (eg pigmentation, acne)
- Farm to (vanity) table
- Highly recognised food ingredients in beauty – now overused
- Natural products are valued for their safety
- Snail, cica and collagen among top ingredients considered natural
  - Graph 12: Skincare ingredients associated with natural
- Non-chemical ingredient names are easily understood as natural
  - Graph 13: Skincare ingredients associated with natural
- Market dynamism contributes to active consumerism
- Exhaustion for familiar kitchen ingredients opens the door for premiumisation
- Natural bodycare products are in demand
  - Graph 14: Natural bodycare product usage of consumers who start using natural products
- Leverage safe and natural to build a premium market for natural and organic products
- Consumer insights in summary

## MARKET APPLICATIONS

- Opportunities: Key focus area

### Opportunities

- Brands can help to define natural vs organic
- Three key targets for the natural & organic skincare
- Older consumers are early adopters of natural products
- Reach the older consumers at the right place with the right messages
- Target young consumers for growth
- Be transparent with information for younger consumers
- Tap into the potential for premium naturals
- Offer something unique to the premium consumers
- Look beyond familiar food ingredients
- Set the premium narrative
- Potential ingredients to premiumise
- Quickly tap into the growth on natural sheet mask category
  - Graph 15: Natural facial skincare format launch, 2016-18
- Space for natural products in masks and serums
- Consumers are looking for brightening and firming in bodycare...
  - Graph 16: Desired benefits in bodycare products, 2019
- ...but the current offering lags behind
  - Graph 17: Claims on launched bodycare products, Sep 2015-Aug 2019
- Sustainability will be a premium offer

### Who's innovating

- Local brands elevating Thai ingredients
- Na Ha Thai utilises one of Northern Thailand's top export commodity into clean skincare
- APARA highlights latex as their key ingredient

### Global innovations

- From celery juice to celery cream
- Edible superfood face mask
- Brightening pineapple serum
- Market applications in summary

## THE BOARDROOM CHECKLIST

- The boardroom checklist

### APPENDIX

- Consumer research methodology

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