

ORAL HYGIENE – THAI CONSUMER – 2020

Dynamics of oral hygiene are strong as they start to cross over to beauty spaces.



A Mintel Analyst, Global Analyst



Report Content



- What you need to know

EXECUTIVE SUMMARY

- The future of oral hygiene in Thailand
- Evolving oral care landscape on the product level
- Consumers are looking for more
- Oral care is occupying a fluid space
- Thais are mindful of their oral hygiene

KEY TRENDS

- The oral health landscape is on an uptick
- Oral hygiene of Thai consumers have improved
- Steady growth in consumers seeking dental care services
 - Graph 1: dental treatment received, 2006-2017
- Growth of the premium segment in oral care
 - Graph 2: oral hygiene launches with premium claims, January 2015
- Premium brands opting for growth opportunities in Thailand
- Consumers have been spending more to take care of their oral health and the market is expected to grow exponentially
 - Graph 3: spend per capita on oral hygiene, 2013-2022

KEY DRIVERS

- Dental care subsidies provided by the government
- Consumers are taught oral care routine
- Disposable income is growing
- APAC retail market overview: oral hygiene 2019
- Getting braces is the gateway to plastic surgery
- Oral hygiene intertwines with self-confidence

GLOBAL TRENDS AND HOW THEY ARE PLAYING OUT IN THAILAND

- Brands across categories seize opportunities in oral care
- Science plays out within oral care

CONSUMER INSIGHT

- What you need to know

1. Movements within the category

- Consumers are expanding their oral care product repertoire
- Urban affluent females are stepping up their oral care game
- Consumers are using oral care items beyond toothbrushes and toothpaste
 - Graph 4: oral care product current usage, November, 2019
- Conventional products are facing threats with the drop in interest among consumers
 - Graph 5: oral care product usage, November 2019
- Newly entered products are taking the leap
 - Graph 6: oral care products that consumers "Never used it but interested in using it," November 2019
- Decline in launches with whitening and sensitivity claims
 - Graph 7: whitening and sensitive gum claims in oral hygiene product launches, January 2015
- Local players capitalise on herbal toothpaste
- Changes in oral hygiene retail spaces

2. Premiumisation in the category

- Aesthetics in oral health are key concerns for Thai consumers
 - Graph 8: dental issues, November 2019
- Consumers look for premium options in oral care
 - Graph 9: oral hygiene product usage, November 2019
- Prestige oral care brands are taking share in the market
- High-income parents are upgrading their oral care products
- CHAID analysis – change a regular oral hygiene product to a premium/high-quality product
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- Electric toothbrush users take extra care of their oral hygiene
- Male and younger consumers are the current main users of electric toothbrushes
 - Graph 10: electric toothbrush users, November 2019

3. Dental care crosses over to the beauty realm

- Oral hygiene brands borrow the concept of beauty
- Oral care is part of beauty routine
- Consumers who viewed oral hygiene as part of beauty and personal appearance are paying more attention to oral health
 - Graph 11: consumers with beauty attitudes towards oral hygiene, by product usage, November 2019.
- Oral care taps into emotional values
- A pretty face is not enough...if you have bad breath

- Oral hygiene helps employees and self-employed consumers gain confidence
 - Graph 12: consumers with beauty attitudes towards oral hygiene, November 2019
- Colgate's new tear jerking commercial revamps the brand image
- Consumer insights in summary

MARKET APPLICATION

- Opportunities: key focus area

Opportunities

- 1. Declining segments need new innovations
- Save the declining segment with innovations
 - Graph 13: oral hygiene product usage, November 2019
- Adding new tweaks to existing products
- Dental care tools are the white spaces for innovations
 - Graph 14: oral hygiene product launches by sub-category, January 2017
- Interest in using dental ancillaries is strong in the Thai market
 - Graph 15: oral hygiene products that consumers "have never used but interested in using, November 2019
- New innovations are inspiration for dental ancillaries
- Herbal toothpaste shows high success and it is time to expand the portfolio
- 2. Bring on premium dental products
- Use premium toothpaste as an entry product
- Deliver high-performance oral care products
 - Graph 16: consumers who are interested in premium toothpaste, attitude towards toothpaste with advanced technology formulas, November 2019
- Differentiate with natural positioning
- High potential in DIY whitening treatments
- Thai market is ready for premium DIY treatment
 - Graph 17: product innovations interest in at-home DIY Whitening treatment, November 2019
- 3. Borrow inspirations across categories
- Fluidity in the oral care segment
- Time to blur the lines between oral care and beauty
- Expand the idea of beauty gadgets into electric toothbrushes to drive women's interest
- Promote oral care regimens in urban areas
 - Graph 18: attitudes towards oral hygiene by area, November 2019
- Beauty bloggers can help promote oral care regimens
- Identify food flavours that are growing in oral care
 - Graph 19: flavour launches in oral hygiene products, January 2015
- Oral care may become bed partners with uncommon food categories

- Market applications in summary

Who's innovating

- Emerging premium options from local players
- Tep Thai owns the traditional herbal positioning
- Liquid toothpaste – innovative format and texture

Global innovations

- Colgate launched a Valentine's Edition toothpaste
- Marvis brings wonders of the world experience to your mouth
- Products to help build dental care regimens

BOARDROOM CHECKLIST

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