

WHITENING SKINCARE TREND - THAI CONSUMER - 2020

Players need to prepare themselves for upcoming change in the whitening segment.



A Mintel Analyst, Global Analyst



Report Content



EXECUTIVE SUMMARY

- What you need to know
- The future of whitening in the Thai market
- Whitening is now framed solely on the face
- Emotional impact on whitening communications
- Whitening occupying large space in the Thai beauty market

KEY TRENDS

- What you need to know
- Skincare market in Thailand is on a path to steady growth
 - Graph 1: Retail value of facial care and bodycare, 2013-22
- Whitening leads in the beauty category
- Why whitening is essential to Thai society
- Whitening solutions are led by facial care
 - Graph 2: Selected key categories of whitening/brightening launches in Thailand, Nov 2015-Oct 2019
- Face whitening communication overwhelms other categories
- However, the ideal white skin is starting to face challenges
- Evolution in ideal beauty represented by beauty pageant, Miss Universe Thailand
- Emergence of tanned skin positivity with celebrities and beauty bloggers

KEY DRIVERS

- Whitening segment is contradicting with current social shifts
- Brand mis-steps have shaped the future tone of whitening advertisements
- The comparison is still there but subtle
- Healthy lifestyles translate into new beauty demands
- Rise of fitness and wellbeing fuels the tanned skin boom
- Growing awareness and discussion in mental health
- Anti-bullying movement in Thailand reshapes beauty perspectives

GLOBAL TRENDS AND HOW THEY ARE PLAYING OUT IN THAILAND

- Entering the whitening market in a non-traditional way...
- ... by cross-category for whitening opportunities

Whitening Skincare Trend - Thai Consumer - 2020

- Thailand shows both high inclusivity and whitening beauty
 - Graph 3: [no title]
- Social changes reshape ideal beauty
- Brands need to respond to new values

CONSUMER INSIGHT

- What you need to know
- High saturation of whitening needs in the Thai market
- Whitening is what consumers are looking to buy
- Whitening is what consumers are looking to buy
 - Graph 4: Claims consumer look for when buying facial skincare products, Aug 2019
- ...despite the top skin concerns are not related to whitening solutions
 - Graph 5: Skin conditions in the past 12 months, Aug 2019
- Thai consumers have a high awareness of whitening ingredients
 - Graph 6: Perception of popularity of skincare ingredients, Aug 2019
- Whitening's focus on face is above body but...
- Whitening's focus on face is above body but...
 - Graph 7: Products bought, August 2019
- ... both categories are critical for the holistic whitening outcome
- TURF analysis - whitening products usage
- Whitening needs to cross over to bodycare spaces
 - Graph 8: Benefits consumers look for in facial skincare and/or bodycare
- Half of the consumers are already using both whitening face and bodycare
- Who is using whitening products
- Who is using whitening products
- Who is using whitening products
- Non-whitening users (11%)
- Non-whitening users (11%)
- Whitening body products-only users (8%)
- Whitening body products-only users (8%)
- Whitening facial products-only users (32%)
- Whitening facial products-only users (32%)
- Whitening facial and body products users (49%)
- Whitening facial and body products users (49%)
- Emerging needs for a new angle of whitening – skin glow
 - Graph 9: Claims consumer look for when buying facial skincare products, Aug 2019
- Focus on barriers to glowing skin as an area of new opportunity for whitening segment

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- Graph 10: Skin condition experienced in the last 12 months, by age group, Aug 2019
- Rising demand for glowing body
 - Graph 11: Facial skincare and bodycare claims consumers look for when buying bodycare products, Aug 2019
- Brands must start appealing to consumers' values
- Consumer insights in summary

MARKET APPLICATIONS

- Opportunities: Key focus area

Opportunities

- The whitening benefit demand is still relevant
- Expand regimen of those who use whitening body-only products
- Empower natural ingredients to build masculinity
- Upgrading exclusive facial care users
- Citra "Leave No Body Behind" campaign
- Promote dual whitening facial and bodycare for users to go beyond
- Benefit-driven tomato juice
- Reposition the whitening aim to catch on with lifestyle and social movements
- L'Oreal Paris offers whitening solutions for every skintone with #glowyourownaura
- Transformation of the definition of whitening in the Thai market
- New ways of communicating whitening products
- Spot correctors are relevant to Thai skin issues
- Leverage the popularity of vitamin C
- Double up the benefit
 - Graph 12: Skin conditions in the past 12 months, Aug 2019
- Head to toe glow!
- Beauty influencers are the head-spear of the movement
- Market applications in summary

Who's innovating

- athit encouraged consumers to be proud of their tanned skin
- Whitening cleanser with natural ingredients for men
- Linking from face to body
- Go beyond with whitening supplements

Global innovations

- Inside out Beauty Ecosystem
- Brighter future with the advanced beauty devices

BOARDROOM CHECKLIST

- Boardroom checklist
- Meet the expert

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