EXECUTIVE SUMMARY

Beauty and personal care in 2022: The big picture
2022 key trends
Competitive landscape
Retailing developments
What next for beauty and personal care?

MARKET DATA

Table 1 - Sales of Beauty and Personal Care by Category: Value 2017-2022
Table 2 - Sales of Beauty and Personal Care by Category: % Value Growth 2017-2022
Table 3 - GBO Company Shares of Beauty and Personal Care: % Value 2018-2022
Table 4 - NBO Company Shares of Beauty and Personal Care: % Value 2018-2022
Table 5 - LBN Brand Shares of Beauty and Personal Care: % Value 2019-2022
Table 6 - Penetration of Private Label in Beauty and Personal Care by Category: % Value 2017-2022
Table 7 - Distribution of Beauty and Personal Care by Format: % Value 2017-2022
Table 8 - Distribution of Beauty and Personal Care by Format and Category: % Value 2022
Table 9 - Forecast Sales of Beauty and Personal Care by Category: Value 2022-2027
Table 10 - Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby and Child-Specific Products in Thailand

KEY DATA FINDINGS

2022 DEVELOPMENTS

Dynamic growth as mobility returns and new products are launched
Players take advantage of social media to offer deals and run campaigns
Natural and organic products increase in number and popularity

PROSPECTS AND OPPORTUNITIES

Rising knowledge and innovation set to drive growth
E-commerce expected to see increased significance despite return to stores
The role of social media is likely to be enhanced

CATEGORY DATA

Table 11 - Sales of Baby and Child-specific Products by Category: Value 2017-2022
Table 12 - Sales of Baby and Child-specific Products by Category: % Value Growth 2017-2022
Table 13 - Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2017-2022
Table 14 - NBO Company Shares of Baby and Child-specific Products: % Value 2018-2022
Table 15 - LBN Brand Shares of Baby and Child-specific Products: % Value 2019-2022
Table 16 - LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2019-2022
Table 17 - LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2019-2022
Table 18 - LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2019-2022
Table 19 - Forecast Sales of Baby and Child-specific Products by Category: Value 2022-2027
Table 20 - Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2022-2027
Table 21 - Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2022-2027

Bath and Shower in Thailand
KEY DATA FINDINGS

2022 DEVELOPMENTS

Liquid soap and hand sanitisers see slower value growth
Adding value to products is one way of driving value growth
Consumers look to be pampered, and players launch relevant products

PROSPECTS AND OPPORTUNITIES

Body wash/shower gel and bar soap set to drive actual value growth
Small emerging players likely to fragment the competitive landscape further
E-commerce set to maintain growth as promotions will draw in consumers

CATEGORY DATA

Table 22 - Sales of Bath and Shower by Category: Value 2017-2022
Table 23 - Sales of Bath and Shower by Category: % Value Growth 2017-2022
Table 24 - Sales of Bath and Shower by Premium vs Mass: % Value 2017-2022
Table 25 - NBO Company Shares of Bath and Shower: % Value 2018-2022
Table 26 - LBN Brand Shares of Bath and Shower: % Value 2019-2022
Table 27 - LBN Brand Shares of Premium Bath and Shower: % Value 2019-2022
Table 28 - Forecast Sales of Bath and Shower by Category: Value 2022-2027
Table 29 - Forecast Sales of Bath and Shower by Category: % Value Growth 2022-2027
Table 30 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2022-2027

Colour Cosmetics in Thailand

KEY DATA FINDINGS

2022 DEVELOPMENTS

Hybrid products drive growth, but sales remain low compared with pre-pandemic
E-commerce maintains share growth despite return to health and beauty specialists
Players offer promotions to try and attract price-sensitive consumers

PROSPECTS AND OPPORTUNITIES

As some consumers continue to wear a mask, recovery will be protracted
More sophisticated demand expected to drive new product launches
Interesting developments in omnichannel retailing

CATEGORY DATA

Table 31 - Sales of Colour Cosmetics by Category: Value 2017-2022
Table 32 - Sales of Colour Cosmetics by Category: % Value Growth 2017-2022
Table 33 - NBO Company Shares of Colour Cosmetics: % Value 2018-2022
Table 34 - LBN Brand Shares of Colour Cosmetics: % Value 2019-2022
Table 35 - LBN Brand Shares of Eye Make-up: % Value 2019-2022
Table 36 - LBN Brand Shares of Facial Make-up: % Value 2019-2022
Table 37 - LBN Brand Shares of Lip Products: % Value 2019-2022
Table 38 - LBN Brand Shares of Nail Products: % Value 2019-2022
Table 39 - LBN Brand Shares of Premium Colour Cosmetics: % Value 2019-2022
Table 40 - Forecast Sales of Colour Cosmetics by Category: Value 2022-2027
Table 41 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2022-2027

Deodorants in Thailand

KEY DATA FINDINGS

2022 DEVELOPMENTS
Rising demand for deodorants as people spend more time outside the home
Competitive landscape remains fairly consolidated
Pricing, gifts and online campaigns help drive sales

PROSPECTS AND OPPORTUNITIES
Dynamic growth expected, especially for deodorant sprays
Deodorant sprays likely to be the winner in the cross-category competition
Scents and benefits will drive innovation, as well as natural ingredients

CATEGORY DATA
Table 42 - Sales of Deodorants by Category: Value 2017-2022
Table 43 - Sales of Deodorants by Category: % Value Growth 2017-2022
Table 44 - Sales of Deodorants by Premium vs Mass: % Value 2017-2022
Table 45 - NBO Company Shares of Deodorants: % Value 2018-2022
Table 46 - LBN Brand Shares of Deodorants: % Value 2019-2022
Table 47 - LBN Brand Shares of Premium Deodorants: % Value 2019-2022
Table 48 - Forecast Sales of Deodorants by Category: Value 2022-2027
Table 49 - Forecast Sales of Deodorants by Category: % Value Growth 2022-2027
Table 50 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2022-2027

Depilatories in Thailand

KEY DATA FINDINGS

2022 DEVELOPMENTS
Cost considerations help drive growth, as consumers turn to at-home hair removal
Large share of sales of depilatories remains concentrated amongst three players
Hair removers/bleaches highlight natural ingredients and additional benefits

PROSPECTS AND OPPORTUNITIES
Despite the competition, growth is set to continue
Products offering additional benefits likely to be the most successful
Although rising from a comparatively low base, e-commerce is set to maintain growth

CATEGORY DATA
Table 51 - Sales of Depilatories by Category: Value 2017-2022
Table 52 - Sales of Depilatories by Category: % Value Growth 2017-2022
Table 53 - Sales of Women’s Razors and Blades by Type: % Value Breakdown 2018-2022
Table 54 - NBO Company Shares of Depilatories: % Value 2018-2022
Table 55 - LBN Brand Shares of Depilatories: % Value 2019-2022
Table 56 - Forecast Sales of Depilatories by Category: Value 2022-2027
Table 57 - Forecast Sales of Depilatories by Category: % Value Growth 2022-2027

Fragrances in Thailand

KEY DATA FINDINGS

2022 DEVELOPMENTS
Premium fragrances drives recovery in 2022
New product launches seen in both the premium and mass segments
Events and brand ambassadors used to promote brands

PROSPECTS AND OPPORTUNITIES
Continued growth despite different challenges for mass and premium fragrances
E-commerce set to maintain its growth trend
Sustainability expected to be a rising trend

CATEGORY DATA

Table 58 - Sales of Fragrances by Category: Value 2017-2022
Table 59 - Sales of Fragrances by Category: % Value Growth 2017-2022
Table 60 - NBO Company Shares of Fragrances: % Value 2018-2022
Table 61 - LBN Brand Shares of Fragrances: % Value 2019-2022
Table 62 - LBN Brand Shares of Premium Men's Fragrances: % Value 2019-2022
Table 63 - LBN Brand Shares of Premium Women's Fragrances: % Value 2019-2022
Table 64 - Forecast Sales of Fragrances by Category: Value 2022-2027
Table 65 - Forecast Sales of Fragrances by Category: % Value Growth 2022-2027

Hair Care in Thailand

KEY DATA FINDINGS

2022 DEVELOPMENTS

Dynamic growth as consumer mobility returns
Developments in conditioners and treatments
Players in colourants focus on nourishing hair

PROSPECTS AND OPPORTUNITIES

Salon professional hair care set to see rising popularity
Marketing programmes, social responsibility and sustainability will remain important
Value creation likely to be important to drive growth

CATEGORY DATA

Table 66 - Sales of Hair Care by Category: Value 2017-2022
Table 67 - Sales of Hair Care by Category: % Value Growth 2017-2022
Table 68 - Sales of Hair Care by Premium vs Mass: % Value 2017-2022
Table 69 - NBO Company Shares of Hair Care: % Value 2018-2022
Table 70 - NBO Company Shares of Salon Professional Hair Care: % Value 2018-2022
Table 71 - LBN Brand Shares of Hair Care: % Value 2019-2022
Table 72 - LBN Brand Shares of Colourants: % Value 2019-2022
Table 73 - LBN Brand Shares of Salon Professional Hair Care: % Value 2019-2022
Table 74 - LBN Brand Shares of Styling Agents: % Value 2019-2022
Table 75 - LBN Brand Shares of Premium Hair Care: % Value 2019-2022
Table 76 - Forecast Sales of Hair Care by Category: Value 2022-2027
Table 77 - Forecast Sales of Hair Care by Category: % Value Growth 2022-2027
Table 78 - Forecast Sales of Hair Care by Premium vs Mass: % Value 2022-2027

Men's Grooming in Thailand

KEY DATA FINDINGS

2022 DEVELOPMENTS

Greater attention to appearance and end of pandemic restrictions drive growth
Promotions and brand ambassadors used to attract consumers
Players drive growth by adding value in various ways

PROSPECTS AND OPPORTUNITIES

Increasing knowledge and product development set to contribute to growth
Growth of colour cosmetics for men, driven by popular brand ambassadors
E-commerce set to maintain growth, and social media will be key for promotion
KEY DATA FINDINGS

2022 DEVELOPMENTS

Good oral care habits are maintained even as the pandemic eases
Leaders carry out aggressive promotions to compete
Developments in toothpaste and power toothbrushes drive growth

PROSPECTS AND OPPORTUNITIES

Several categories set to drive growth thanks to premiumisation and innovation
Greater fragmentation, as new players enter and Thai consumers try new options
Social media to play an important role in communication

KEY DATA FINDINGS

Skins Care in Thailand

2022 DEVELOPMENTS

Particularly strong growth for face masks and intensive eye care products
Entry of new brands, and expanded portfolios from existing brands
Anti-ageing is the main trend in skin care, driving numerous new product launches

PROSPECTS AND OPPORTUNITIES

Continued growth expected, driven by both mass and premium skin care
Aggressive promotions will be a strategy to attract consumers
Consumers likely to maintain their full skin care routine, even if they trade down
CATEGORY DATA
Table 101 - Sales of Skin Care by Category: Value 2017-2022
Table 102 - Sales of Skin Care by Category: % Value Growth 2017-2022
Table 103 - NBO Company Shares of Skin Care: % Value 2018-2022
Table 104 - LBN Brand Shares of Skin Care: % Value 2019-2022
Table 105 - LBN Brand Shares of Basic Moisturisers: % Value 2019-2022
Table 106 - LBN Brand Shares of Anti-agers: % Value 2019-2022
Table 107 - LBN Brand Shares of Firming/Anti-cellulite Body Care: % Value 2019-2022
Table 108 - LBN Brand Shares of General Purpose Body Care: % Value 2019-2022
Table 109 - LBN Brand Shares of Premium Skin Care: % Value 2019-2022
Table 110 - Forecast Sales of Skin Care by Category: Value 2022-2027
Table 111 - Forecast Sales of Skin Care by Category: % Value Growth 2022-2027

KEY DATA FINDINGS
2022 DEVELOPMENTS
Greater mobility and premium and organic product launches drive growth
E-commerce remains popular as consumers return to travel
Products available to meet any possible need

PROSPECTS AND OPPORTUNITIES
Growth expected for both the mass and premium segments
Consumers likely to favour products with multiple benefits
Reef-safe products likely to be an opportunity due to sustainability trend

CATEGORY DATA
Table 112 - Sales of Sun Care by Category: Value 2017-2022
Table 113 - Sales of Sun Care by Category: % Value Growth 2017-2022
Table 114 - NBO Company Shares of Sun Care: % Value 2018-2022
Table 115 - LBN Brand Shares of Sun Care: % Value 2019-2022
Table 116 - LBN Brand Shares of Premium Adult Sun Care: % Value 2019-2022
Table 117 - Forecast Sales of Sun Care by Category: Value 2022-2027
Table 118 - Forecast Sales of Sun Care by Category: % Value Growth 2022-2027

Sun Care in Thailand

KEY DATA FINDINGS
2022 DEVELOPMENTS
Sales rebound as pandemic restrictions end and consumer confidence returns
Dynamic new product development, especially in skin care
The move by players online continues

PROSPECTS AND OPPORTUNITIES
Several factors set to drive strong growth for premium beauty and personal care
Sustainability will remain important to companies and consumers
Aggressive pricing strategies in a competitive environment

CATEGORY DATA
Table 119 - Sales of Premium Beauty and Personal Care by Category: Value 2017-2022
Table 120 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2017-2022
Table 121 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2018-2022
Mass Beauty and Personal Care in Thailand

KEY DATA FINDINGS

2022 DEVELOPMENTS
Multi-benefit products appreciated by consumers for their time- and cost-saving
Demonstrating products and selling through social media
Fragmentation increases as more players see opportunities

PROSPECTS AND OPPORTUNITIES
Strong growth potential will drive new launches and ensure strong sales
Entry of new players will lead to further fragmentation
Sustainability and premiumisation will remain key trends

CATEGORY DATA

Table 125 - Sales of Mass Beauty and Personal Care by Category: Value 2017-2022
Table 126 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2017-2022
Table 127 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2018-2022
Table 128 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2019-2022
Table 129 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2022-2027
Table 130 - Forecast Sales of Mass Beauty and Personal Care by Category: % Value Growth 2022-2027

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings**: Global or regional in scope, and focusing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles**: Analysis dedicated to the world’s most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports**: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.