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Green, clean and natural - new lifestyle for Thai consumers in a post-COVID 19 era (part)

Mintel Thai Consumer Report

The smartest way to understand consumer markets across Thailand.

An interactive consumer research tool on the Thai market with insights on **key trends** and **local market application.**

Experts in what consumer want and why

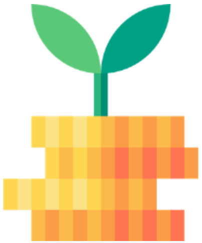
METHODOLOGY

1 **WHO?**
General population Thai adults aged 18-45+ | 1,500 – 2,000 samples
Mintel partner's with a leading global data provider, Dynata.

2 **HOW?**
Design | Online Panel | Data Analysis | Reporting
Covering 50 report titles of Food & Beverage, Beauty & Personal Care and Lifestyle

3 **WHERE?**
5 Regions: Bangkok, Central Region, North, Northeast, South regions

Why Mintel Thai Consumer Reports?



A very cost-effective way to understand the consumer behaviour and sentiment

Recommendations from experienced analysts that know the consumer and the industry

Actionable insights on "what are the opportunities and how to seize them"

Mintel Thai Consumer – Food and Drink

2020

1. Snack Food
2. Sports & Energy Drinks
3. Ready Meals
4. RTD Coffee and Tea
5. Attitudes to Functional Food and Drink
6. Attitudes to Protein and Protein Substitutes
7. Processed Meat
8. Cooking at Home
9. Eating Out
10. Milk and Dairy Alternatives
11. Foodservice Flavour Trends
12. Pet Food
13. Vitamins, Minerals, and Supplements
14. QSR
15. Instant Noodles
16. Tea & Infusions
17. Processed Fish
18. Biscuits (Cookies & Crackers)
19. Sweet Bakery
20. Sugar & Sweeteners
21. Juices
22. Table & Cooking Sauces

2021

1. Non-alcoholic Beverage Trends
2. Salty Snacks
3. Functional Food & Drink
4. Milk & Dairy Alternatives
5. Plant-based Diet
6. Vitamins, Minerals & Supplements
7. Ice-cream and Frozen Treats
8. Noodles & Rice
9. Coffee Shop
10. Sweet Flavour Trends ; Retail
11. Ready Meals
12. Processed Fruits and Vegetables
13. Sports & Energy Drinks
14. Coffee & RTD Coffee ; Retail
15. Menu Insights – cuisines
16. Tea & RTD Tea ; Retail
17. Seasoning, Herb and Spices
18. Processed Fish and Seafood
19. Table & Cooking Sauces
20. Poultry Consumption ; Retail

2022

1. Juices
2. Sports & Energy Drinks
3. Ice-Cream
4. Milk & Dairy Alternatives
5. Yogurt
6. Salty Snacks
7. Instant Noodles
8. Processed Fish
9. Processed Meat
10. Table and Cooking Sauces
11. Ready Meals
12. Vitamins, Minerals & Supplements
13. Functional Food & Drink
14. Non-Alcoholic Beverage Trends
15. Natural and Organic Food and Drink
16. Plant-based Diets
17. Breakfast Foods
18. Cooking at Home
19. Attitudes to Home Delivery and Takeaway
20. Sustainability in Packaged Foods

Mintel Thai Consumer – Beauty and Personal Care

2020

1. Natural & Organic Skincare
2. Colour Cosmetics
3. Beauty Routines
4. Whitening Skincare Trends
5. Suncare
6. Shampoo & Conditioners
7. Deodorants
8. Oral Hygienes
9. Ingestible Beauty
10. Attitudes towards Anti-aging
11. Body Care
12. Facial Care
13. Soap, Bath and Shower Products
14. The Beauty Shopper
15. Household Cleaner
16. Fabric Care
17. Baby Personal Care

2021

1. Attitudes towards hygiene and sanitization
2. Acne
3. Attitudes towards Functional ingredients
4. Dermacosmetics
5. Oral Hygiene
6. Attitudes towards beauty retail
7. Natural and Organic Skincare
8. Beauty Routines
9. Colour Cosmetics Lips & Eye
10. Colour Cosmetics Face
11. Attitudes towards beauty and grooming services
12. Body Care
13. Attitudes towards beauty and wellness
14. Men's Grooming
15. Facial Care
16. Suncare
17. Haircare
18. Soap, Bath and Shower Products
19. Fragrances and scent in BPC trends
20. Deodorants

2022

1. Ingestible Beauty
2. Men's Beauty
3. Clean Beauty
4. Skin Glow and Brightening Trends
5. Color Cosmetics - Base Makeup
6. Color Cosmetics - Point Makeup
7. Attitudes towards Functional Ingredients
8. Facial Care beyond Moisturizer
9. Home Fragrance
10. Digital Route to Market for Beauty
11. Dermacosmetics
12. Preventive Beauty
13. Curative Beauty
14. Thai Beauty Persona
15. Face Mask
16. Convenience (CVS) Beauty
17. Body Skin (+ body shower & skincare)
18. Haircare
19. Fabric Care
20. Attitudes to Household Cleaners

Mintel Thai Consumer - Lifestyle

2020

1. Attitudes to Grocery Shopping
2. Attitudes to Healthy Living
3. Sustainability
4. Attitudes to Private Label
5. Lifestyles of the Over 55s
6. Attitudes to Convenience
7. eCommerce
8. Marketing to Millennials
9. Attitudes to Premiumisation
10. Digital Marketing

2021

1. Attitudes towards Local Products
2. Attitudes towards Travel & Leisure
3. E-commerce
4. Festival Lifestyle
5. Financial Landscape
6. Attitudes towards Fitness
7. Attitudes towards Healthy Living
8. Premiumisation
9. Sustainability
10. Lifestyles of Women

2022

1. Attitudes to Grocery Shopping
2. Attitudes towards Mental Health
3. Attitudes towards Private Label
4. Marketing to Men
5. Digital Lifestyles (with Data Privacy)
6. Attitudes towards Gaming/E-Sports
7. Marketing to Gen-Z Consumers
8. Marketing to Millenials
9. Future of Packaging
10. Attitudes to Premiumization Post-COVID

Plant-based Diets - Thai consumer

Understand the key influences driving plant-based food adoption and identify consumer segments with potential to accelerate growth in the plant-based meat market.

Animal-based foods: LIMIT rather than ELIMINATE

Majority of consumers are still interested in achieving a balance through eating a healthy combination of animal/plant-based food

LIMIT ANIMAL MEAT

43%

of Thais say, typically, they have been trying to limit their own meat intake all or most of the time

AVOID ANIMAL-DERIVED FOODS/INGREDIENTS

5%

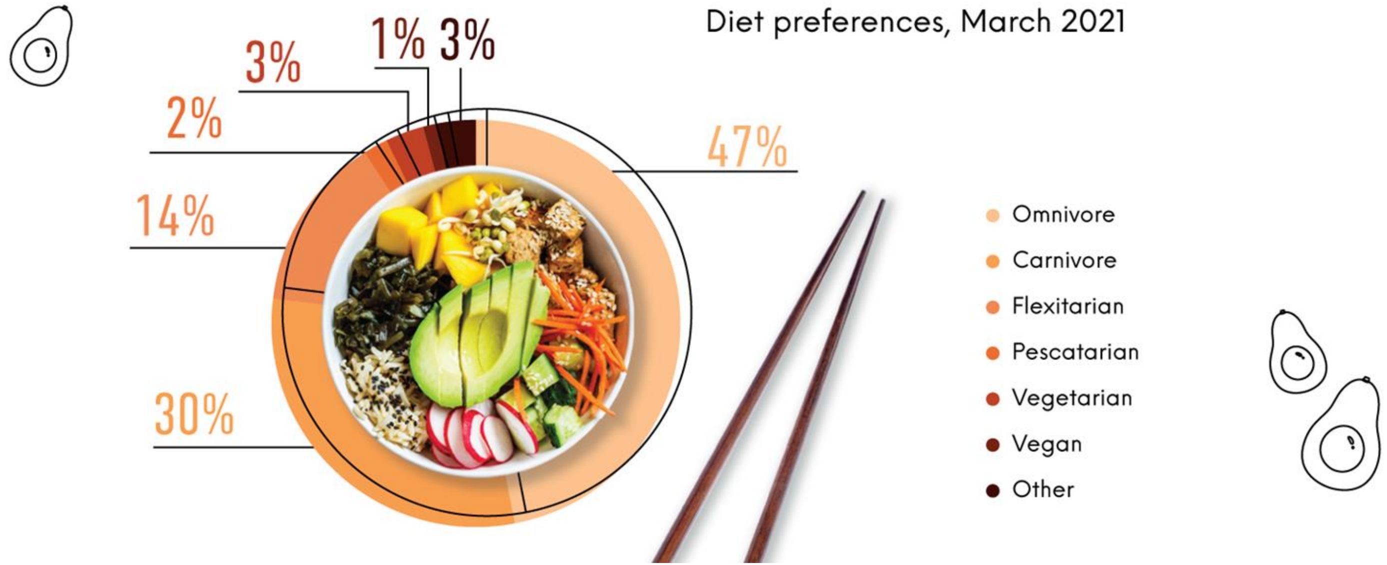
of Thais say that avoiding animal-derived foods/ingredients is an important factor when buying food

Base: *1,000 Thai internet users aged 18+*

Source: *Dynata/Mintel*

Rise of the flexitarians

14% say they ‘eat mostly meatless meals, but do also eat animal-based foods sometimes’



Base: *1,500 internet users aged 18+*

Source: *Dynata/Mintel*

Increased interest in proteins and health triggers the need for alternative sources

SHOPPING CRITERIA

31%

of Thais prioritise **protein content** as an important factor when shopping for food

HEALTHFULNESS

70%

of Thais think that **plant-based protein is healthier than animal-based protein**

PROCESS LEVEL

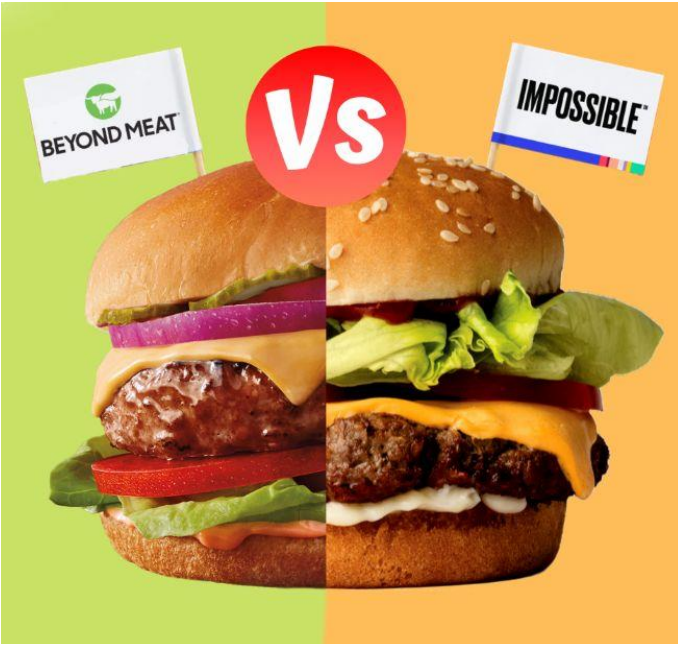
76%

of Thais perceive **protein alternatives to be heavily processed**

Base: *1,000 Thai internet users aged 18+*

Source: *Dynata/Mintel*

Big brand plant-based alternatives are disrupting the dairy and meat categories globally



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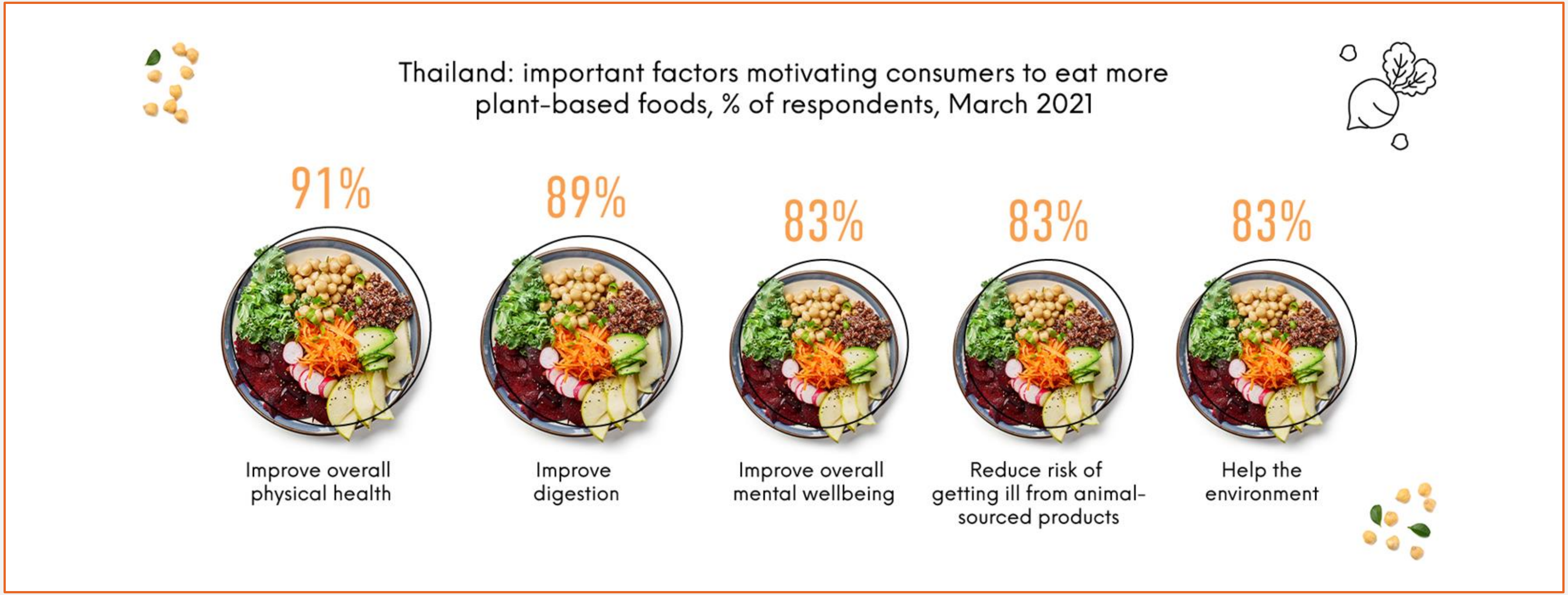
Source: Greenqueen; Foodnavigator; Green Butcher Bank; Livekindly

Thailand is on board with the alternative protein trend

Source: *CPFworldwide; Thai Union; Let's Plant Meat; Meat Avatar; More Meat*

Need for holistic health drive demand for plant-based foods



Base: *1,469 internet users aged 18+ who are interested in adding more plant-based foods and/or plant-based meats into their diet in the next three months*

Source: *Dynata/MIntel*

Attitudes towards plant-based meat products

Consumer segmentation

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Thai consumers fall into four major segments

Four consumer segments based on attitudes towards plant-based meat

Base: *1,500 internet users aged 18+*

Source: *Dynata/MIntel*

Key takeaways

01

Tap into the growing population of **flexitarians** who are aiming at achieving a balance through eating a healthy combination of animal/ plant-based food

02

Eliminate **nutritional doubts,** with focus on product **digestibility** and **protein quality** to win **the skeptics**

- 29% of the population

03

Inspire usage excitement with **innovative ingredients** and **format**

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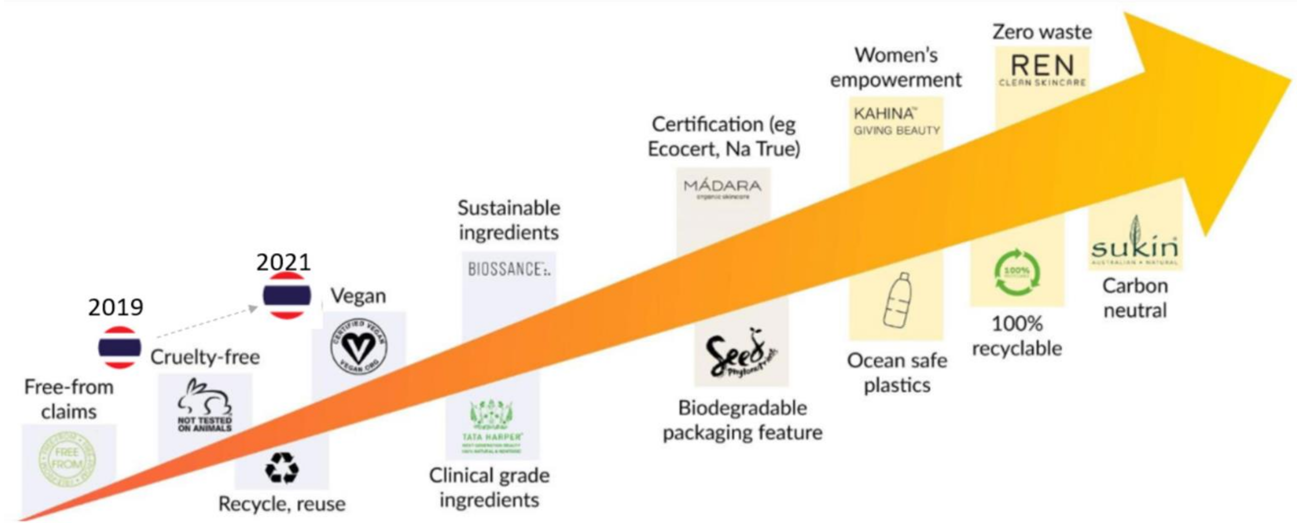
Natural and Organic Skincare - Thai Consumer

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

Thailand is moving up the clean beauty scale



Source: *Mintel*

KEY TRENDS

The clean lifestyle is a total wellness agenda

Refill Station – sustainable social enterprise

Food trends continue to lead clean beauty direction

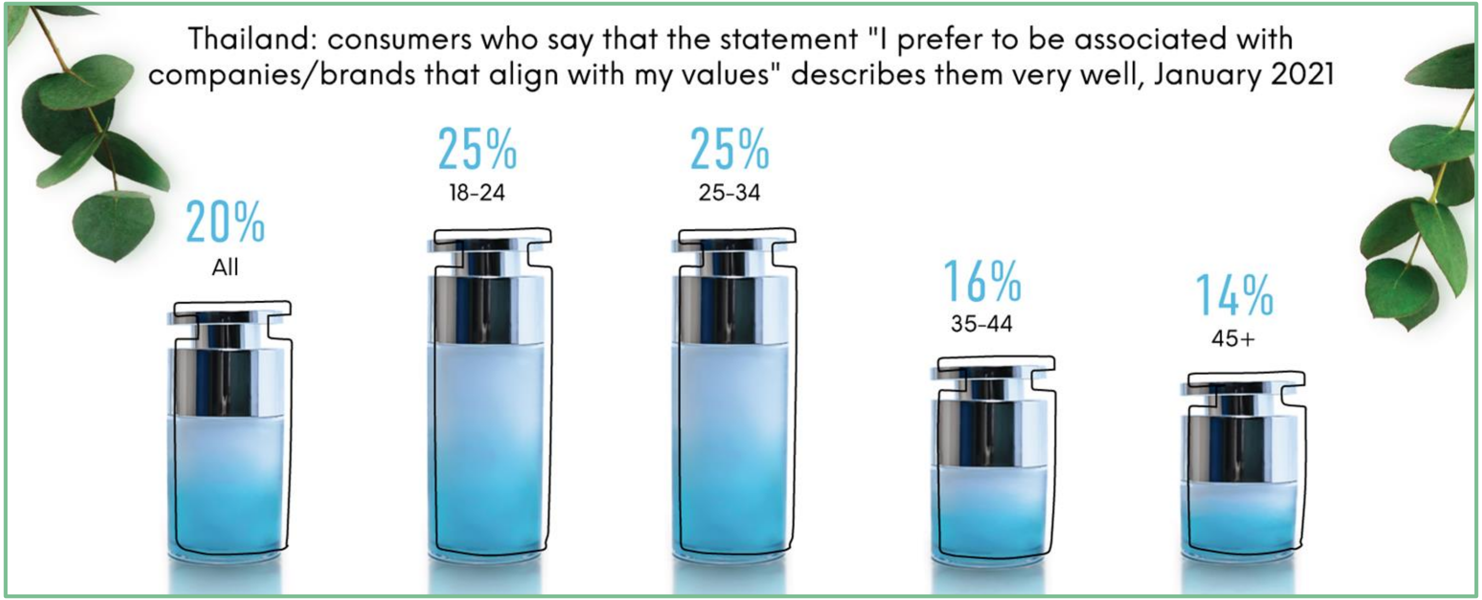
Plant-based options now available at 7-Eleven

Sustainability is starting to become integrated in Thais' daily life

Colgate's biodegradable bamboo toothbrush

CONSUMER INSIGHT

Thai Gen Z and Millennials are the activist generation



Base: 1,000 internet users aged 18+

Source: Dynata/Mintel

Values incentivise Millennials to pay more

PAY MORE

38%

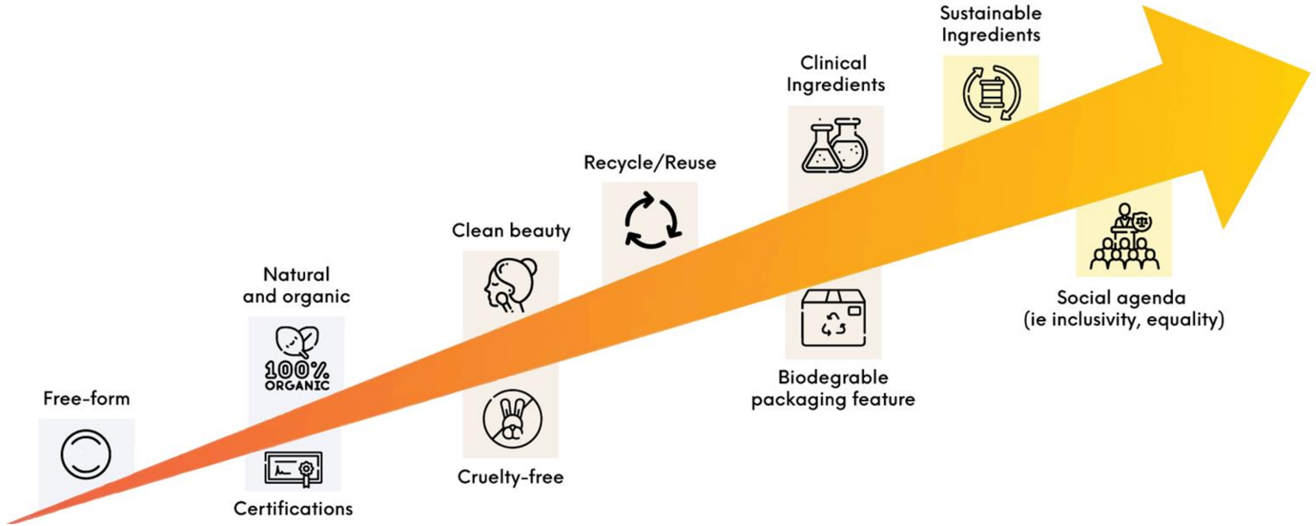
of consumers aged 25-34 strongly agreed that *'It is worth spending more money on skincare products that are natural and organic'*

Base: *2,000 internet users aged 18+*

Source: *[Dynata/Mintel]*

MARKET APPLICATIONS

The future of Thai clean beauty



Show that brands care about animal welfare

Women for Bees, Guerlain x UNESCO project

KEY TAKEAWAYS

01

Clean Beauty is part of Clean lifestyle movement

02

Evolve to keep up with the young mindset shift

03

Premiumize clean beauty using wellness angle

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