

THAILAND BEAUTY AND PERSONAL CARE INDUSTRY REPORT

Bangkok, June 2024



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THAILAND – Beauty and personal care industry report 2024

In 2023, Thailand's beauty and personal care sector saw increased demand driven by refined consumer preferences and a shift towards prioritizing self-care, including grooming and emotional well-being. This led to double-digit growth in both value and volume across the industry. The surge was propelled by the expansion of color cosmetics, supported by market recovery efforts and effective marketing tactics like new product launches and discounts. Consumers also invested in premium skincare products for self-pampering, while premium fragrances remained popular among those seeking emotional wellness. Overall, the industry experienced strong performance and positive trends in these key product categories.

Competitive landscape

In 2023, established global leaders continued to dominate the beauty and personal care industry. Despite fierce competition, new entrants are leveraging digitalization and social media for growth. Both large and small players intensively promoted products to specific demographics throughout the year, emphasizing continuous marketing over sporadic launches. Brands utilized influencers to showcase product benefits, build brand image, and increase awareness through global marketing events. Domestic brands expanded into international markets to enhance their reputation, with Mistine targeting Chinese consumers and Harnn focusing on Singapore. Harnn's physical store in Singapore provides a direct consumer connection and hands-on product experience, catering to the premium segment.

2023 key trends and competitive trends

In 2023, innovation in beauty and personal care was driven by local consumers' sophisticated demands, leading to the 'skinimalism' trend emphasizing simplicity and efficacy. Economic caution from 2022's high inflation prompted Thais to seek maximal benefits from fewer products. Skinimalism gained popularity as consumers sought convenience and efficiency in their busy lives, favoring multifunctional products. Popular choices included anti-wrinkling and whitening solutions, along with versatile makeup products, meeting consumers' desire for simplicity and effectiveness.

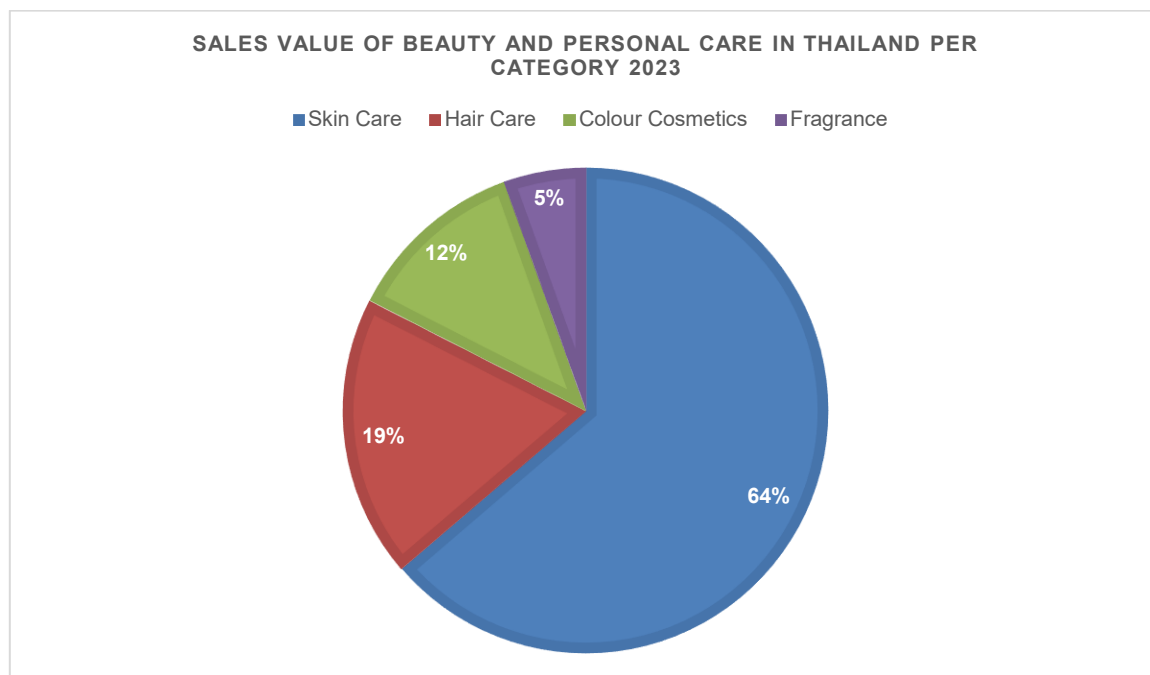
The trend for natural and organic ingredients surged, notably in beauty and personal care. Laura Mercier launched the Translucent Loose Talc-Free Setting Powder Ultra-Blur with these components, meeting the demand in oral care, skin care, color cosmetics, and bath products. Thai consumers increasingly favor natural and organic options, driving the popularity of clean and green products across the industry. This shift has heightened industry focus on sustainability and eco-friendliness, prompting companies to offer sustainable products and packaging. While local consumers prioritize value, they recognize the importance of green products and recycled packaging, forming positive associations with such brands, including vegan options. Refill packs are seen as cost-effective and contribute to the sustainability trend as consumers aim to save money.

To thrive in this environment, entrepreneurs must adapt to digital channels to reach new customers, especially after the impact of the COVID-19 crisis accelerated the shift towards online purchases, underscoring the need to adapt to evolving consumer behaviors.

The current beauty trends this year includes:

- Anti-aging products catered to the aging population in Thailand as they enter the elderly demographic
- Skin care and makeup products derived from natural extracts with minimal ingredients to provide a safe feeling for customers
- Products focusing on nourishing from the inside out, such as various vitamins, in line with current preferences and lifestyles
- Cosmetics and skin care products that leave the skin feeling hydrated and radiant at all times
- Emphasis on innovation and new technologies that will revolutionize the market according to the Beauty AI trend.

Figure 1: Sales value of Beauty and personal care in Thailand per category 2023



Beauty and Personal Care in Thailand, April 2024, Euromonitor International – ITA Bangkok Office

All categories performed better than in 2023 for the current value terms especially color cosmetics, fragrance, and hair care. This growth trend influenced industry developments and gave rise to renewed demand, product innovations, and new personal grooming routines and behaviors.

In terms of mass beauty and personal care products shares the largest sales proportion with 68% shares, following premium products (20%), and dermo-cosmetics beauty and personal care (5.35%) in which witnessed also a positive trend especially dermo-cosmetics with 36.6% growth.

Outlook for Thailand beauty and personal care industry in 2024

The beauty market of Thailand had a value of over USD92.5 billion in 2024, expanding by 9.5% compared to the previous year. Due to the uncertainties from both domestically and internationally factors for examples rising raw material costs, global economic conditions, and intense market competition annually, entrepreneurs must prepare strategies to address challenges such as maintaining product quality, and innovation to meet customer demands.

In the upcoming years, the beauty market in Thailand will encounter intensified competition due to factors like rising raw material costs, increased transportation expenses, and challenging domestic purchasing conditions, notably in the middle and lower market segments. Entrepreneurs are exploring opportunities at trade shows to expand locally and internationally while embracing technologies like Beauty AI to innovate their product offerings and cater to the demand for personalized beauty items. Consumers in Thailand are increasingly valuing quality over price, driving a demand for niche product categories.

Sales value of beauty and personal care products in Thailand

The beauty and personal care market in Thailand has an estimated sales value of approximately 7.2 billion USD in 2023, growing 13% from previous year, of which skin care products gain the most proportion of market value accounted for 64%, influenced by natural ingredients and organic type of product, following with hair care (19%), colour cosmetics (12%), and fragrance (5%), consequently. The sales value of beauty and personal care industry is expected to continue growing around 10-15% and reach 8 billion USD in 2024.

(Million USD, %)

Table 1: Sales of beauty and personal care in Thailand by category 2021-2023

Sales of beauty and personal care in Thailand by category 2021-2023						
	Value (Million USD)			Growth Rate (%)		2023 Market Share (%)
	2021	2022	2023	2022/21	2023/22	
Skin Care	2,115.4	2,345.2	2,629.2	10.86	12.11	36.56
Hair Care	939.4	1,077.0	1,214.9	14.65	12.80	16.89
Bath and Shower	683.3	731.7	799.9	7.08	9.32	11.12
Colour cosmetics	468.8	585.5	778.0	24.89	32.88	10.82
Men's Grooming	448.1	481.5	528.5	7.45	9.76	7.35
Fragrances	239.3	295.7	352.5	23.57	19.21	4.90
Sun Care	143.4	151.9	162.6	5.93	7.04	2.26
Mass Beauty and Personal Care	3,837.9	4,313.5	4,891.2	12.39	13.39	68.01
Premium Beauty and Personal Care	1,101.9	1,254.7	1,461.9	13.87	16.51	20.33
Dermo-cosmetics Beauty and Personal Care	234.2	281.8	384.9	20.32	36.59	5.35
Total Beauty and Personal Care Products	5,716.6	6,362.5	7,191.9	11.30	13.04	100

Beauty and Personal Care in Thailand, May 2023, Euromonitor International – ITA Bangkok Office

International Trade of beauty and personal care products in Thailand

According to the information from Thailand Ministry of Commerce (MOC), the total trade value between Thailand and the world is 571.93 billion US dollars in 2023 which the trade in beauty and personal care¹ accounted for 6.07 billion US dollars or 1.06% of total trade.

Meanwhile, the total trade value between Thailand and Italy reached 5.05 billion US dollars in 2023, accounted for 0.88% of total trade value between Thailand and the world. Through this amount, the total trade of beauty and personal care products between them valued at 61.7 million US dollars in 2022, considered as 1.22% of total trade between both countries.

Harmonized code

1. HS3304: Beauty or make-up preparations and preparations for the care of the skin (other than medicaments), including sunscreen or suntan preparations; manicure or pedicure preparations
2. HS3307: Pre-shave, shaving or after-shave preparations, personal deodorants, bath preparations, depilatories and other perfumery, cosmetic or toilet preparations, not elsewhere specified or included; prepared room deodorisers, whether or not perfumed or having disinfectant properties.
3. HS 3401: Soap; organic surface-active products and preparations for use as soap, in the form of bars, cakes, moulded pieces or shapes, whether or not containing soap; organic surface-active products and preparations for washing the skin, in the form of liquid or cream

¹ Including the products in categories HS33, HS34

and put up for retail sale, whether or not containing soap; paper, wadding, felt and nonwovens, impregnated, coated or covered with soap or detergent.

4. HS3305: Preparations for use on the hair
5. HS3303: Perfumes and toilet waters
6. Product item category MOC329000000 (HS33, HS34): Beauty or make up preparations, soap and preparations for the care of skin

Import value of beauty and personal care products to Thailand by country (Product item category: MOC329000000) 2021-2023 / 2023-2024 (Jan-Apr)

In 2023, Thailand imported around 2.67 billion US dollars of beauty and personal care products from the world, growing 2.9% from previous year. This represented 0.9% of total import from the world.

Singapore, China, Japan, France and USA ranked as top 5 suppliers for Thailand with the market shares of 18.17%, 13.60%, 10.51%, 10.12%, and 9.38%, respectively.

Through this amount, Italy ranked as the 11st supplier for Thailand in terms of the overall beauty and personal care products with value of 60.26 million US dollars in 2023, increasing 25.04% from previous year, occupied 2.25% shares of market.

(USD, %)

Table 3: Import value of beauty and personal care products to Thailand by country 2021-2023 / 2023-2024 (Jan-Apr)

Import value of beauty and personal care products to Thailand by country 2021-2023 / 2023-2024 (Jan-Apr)												
No.	Country	Value (USD)					Market Share (%)			Growth Rate (%)		
		2021	2022	2023	January – April		2022	2023	2024 (Jan-Apr)	2022	2023	2024 (Jan-Apr)
					2023	2024						
1	SINGAPORE	449,641,882	467,152,700	486,081,637	160,224,948	184,064,516	17.98	18.17	19.02	3.89	4.05	14.88
2	CHINA	290,626,024	352,857,121	363,686,465	113,692,146	136,289,230	13.58	13.60	14.08	21.41	3.07	19.88
3	JAPAN	339,485,931	311,340,300	281,149,660	101,672,168	103,392,070	11.98	10.51	10.68	-8.29	-9.70	1.69
4	FRANCE	138,174,072	196,160,433	270,786,118	129,022,494	83,427,705	7.55	10.12	8.62	41.97	38.04	-35.34
5	USA	247,142,985	253,376,874	250,762,284	91,209,502	87,303,270	9.75	9.38	9.02	2.52	-1.03	-4.28
6	INDONESIA	204,765,730	219,851,811	209,101,798	69,326,206	69,816,527	8.46	7.82	7.21	7.37	-4.89	0.71
7	S.KOREA	127,526,923	146,366,969	188,587,554	62,614,477	69,128,758	5.63	7.05	7.14	14.77	28.85	10.40
8	MALAYSIA	95,302,589	107,873,600	86,470,531	29,252,006	28,576,901	4.15	3.23	2.95	13.19	-19.84	-2.31
9	GERMANY	76,254,840	78,174,290	72,853,425	26,083,882	24,784,354	3.01	2.72	2.56	2.52	-6.81	-4.98
10	UK	75,419,575	60,243,949	61,178,479	24,274,909	32,405,538	2.32	2.29	3.35	-20.1	1.55	33.49
11	ITALY	42,714,702	48,193,631	60,261,951	18,597,293	25,682,721	1.85	2.25	2.65	12.83	25.04	38.10
World		2,401,135,962	2,598,850,631	2,674,644,465	950,389,123	967,833,317	100	100	100	8.23	2.92	1.84

Thailand Ministry of Commerce – ITA Bangkok Office

Meanwhile, the exportation of beauty and personal care from Thailand to the world reached 3.4 billion dollars in 2023, increasing 3.97% from last year which represented 1.22% of total export from Thailand to the world.

Japan, Philippines, China, Australia, and Vietnam ranked as top 5 destinations for Thailand with the market shares of 12.74%, 8.8%, 8.63%, 6.92%, and 5.94%, respectively.

Through this amount, Italy ranked as the 64th supplier for Thailand in terms of the overall beauty and personal care products with value of 1,435,429 US dollars in 2023, decreasing -16.04% from 2022, occupied 0.04% shares of market.

(USD, %)

Table 4: Export value of beauty and personal care products from Thailand by country 2021-2023 / 2023-2024 (Jan-Apr)

Export value of beauty and personal care products from Thailand to the world by country 2021-2023 / 2023-2024 (Jan-Apr)												
No	Country	Value (USD)					Market Share (%)			Growth Rate (%)		
		2021	2022	2023	January – April		2022	2023	2024 (Jan-Apr)	2022	2023	2024 (Jan-Apr)
					2023	2024						
1	JAPAN	393,849,916	355,822,643	381,414,193	121,002,212	152,859,295	10.87	11.20	12.74	-9.66	7.19	26.33
2	PHILIPPINES	266,557,979	285,342,677	286,552,619	94,327,031	83,002,668	8.71	8.42	6.92	7.05	0.42	-12.01
3	CHINA	195,091,699	223,885,267	283,128,360	92,072,951	103,581,098	6.84	8.31	8.63	14.76	26.46	12.50
4	AUSTRALIA	202,801,272	227,985,200	254,967,441	77,147,117	105,629,775	6.96	7.49	8.80	12.42	11.84	36.92
5	VIETNAM	225,758,362	232,962,502	230,897,771	73,339,693	71,299,388	7.11	6.78	5.94	3.19	-0.89	-2.78
6	MYANMAR	164,344,640	219,905,477	211,130,567	76,863,069	65,529,743	6.71	6.20	5.46	33.81	-3.99	-14.74
7	LAOS	159,661,595	162,478,648	186,892,825	64,179,222	68,727,401	4.96	5.49	5.73	1.76	15.03	7.09
8	MALAYSIA	164,335,752	200,908,265	186,014,161	63,556,550	59,796,283	6.13	5.46	4.98	22.25	-7.41	-5.92
9	CAMBODIA	171,029,214	171,998,792	183,676,134	63,523,825	64,286,501	5.25	5.39	5.36	0.57	6.79	1.20
10	SOUTH KOREA	92,409,024	108,260,039	124,361,052	41,295,088	40,883,015	3.31	3.65	3.41	17.15	14.87	-1.00
64	ITALY	1,955,185	1,709,621	1,435,429	949,649	509,323	0.05	0.04	0.04	-12.6	-16.04	-46.4
	World	3,065,463,436	3,274,939,318	3,405,047,062	1,099,192,428	1,200,220,377	100	100	100	6.83	3.97	9.19

Thailand Ministry of Commerce – ITA Bangkok Office

Contract Manufacturer service (OEM/ODM)

Market for beauty products in Thailand was primarily driven by the country's strong position as a hub for cosmetics manufacturing in Southeast Asia. Thailand has a well-established cosmetics industry with a range of manufacturers that offer OEM and ODM services to both domestic and international beauty brands.

According to the information from **Krungrsri Research**, the harsh competitive landscape in beauty and personal care in Thailand involves and attracts both new and existed players in every business sizes to take parts in this market through the creation of new brands or product set with innovation and product development. Many new players, especially celebrity or influencer's brands started to gain momentum through online shopping channel and social media platform with micro-marketing method. This created the rising demand of production chain service of beauty and personal care in Thailand.

Thailand has a well-developed infrastructure and capabilities for manufacturing various beauty products, including skincare, haircare, and cosmetics. Many manufacturers offer comprehensive services, from product formulation and development to packaging and labeling.

Thailand's cosmetic industry grows an average of 10-20% per year, ranked 17th beauty products production in the world. There is also a huge development in cosmetic technology and ingredients in Asia after Japan and South Korea.

At the same time, both public and private agencies in Thailand are jointly push forward Thailand to be the hub of cosmetic production in ASEAN since Thai entrepreneurs have the potential to produce, and many of them are already a contract manufacturer for famous worldwide brands. This also supported by the ASEAN Economic Community (AEC) that create more opportunities for international trade among ASEAN members and between ASEAN and its partners through the deduction to zero tariff.

In this case, Thai entrepreneurs usually imported almost all raw materials, such as concentrates, skin care oils, and various extracts from abroad especially European countries, causing the production cost to be quite high. However, in a highly competitive environment, all new and old entrepreneurs need to adapt in order to stay sustainable and competitive in any situation. Therefore, the importation of innovation and technology to serve the manufacturer sector of Thailand beauty and personal care appears to be always relevant with the beauty trend in the country.

In addition, Thailand's strategic location in Southeast Asia makes it a convenient base for exporting beauty products to other countries in the region and beyond. Many OEM/ODM manufacturers in Thailand work with international clients and cater to the global market.

Source: Krungsri Research

Skincare and colour cosmetics products

In 2023, Thailand's **skincare** market embraced skiminalism, emphasizing minimal yet effective routines like cleansing, moisturizing, and protection. Consumers sought multifunctional products with proven ingredients and embraced self-acceptance for a natural glow. Despite COVID-19 impacts, skincare remained popular with a focus on organic, natural, and vegan products. The market saw rising demand for anti-aging solutions and sustainable packaging to align with consumer values, driving innovation and competition among international and local players.

In the skincare industry, ingredient-led innovation is key for driving performance, with prospects focused on ingredients like niacinamide, copper peptides, snail mucin, bakuchiol, electrolyte, and seaweed. The trends of skiminalism, clean beauty, and sustainability will shape future developments, leading to multifunctional products, crossover innovations with other industries, and a focus on herbal and organic ingredients. Consumer preferences in Thailand lean towards lightweight, non-sticky products that absorb easily. Anti-aging remains a significant focus due to demographic shifts. Beauty brands are ramping up CSR efforts to align with consumer values, using strategies like promotions and discounts to compete in the market.

In 2023, the demand for **colour cosmetics** in Thailand surged due to lifted COVID-19 restrictions, leading to significant growth in sales. Consumers are rediscovering products for eyes and lips, compensating for pandemic-related neglect. Lip products are a top priority, while eye makeup is gaining popularity with new innovations driving sales, alongside nail products receiving attention from both mass and premium brands with new launches and marketing efforts. Thai beauty brands leverage e-commerce and social media to enhance global recognition, driving domestic sales. Renowned for affordability and quality, some brands offer smaller, more affordable products for trial purchases, appealing to consumers seeking value and encouraging brand loyalty.

In Thailand, the demand for multifunctional color cosmetics is growing, driven by consumer convenience and cost considerations. This trend is expected to continue, leading to increased innovation and blurred lines between product categories. Additionally, gender-neutral marketing

is on the rise, reflecting changing social values and consumer preferences, with brands supporting diverse lifestyles and causes like LGBTQ+ rights.

Sustainability gains traction in color cosmetics as brands adopt eco-friendly practices. Clean beauty products will see increased investment and marketing focus. E-commerce growth will be driven by competitive pricing and enhanced online shopping experiences, including virtual try-ons and personalized services, leading to expanded online presence.

Sales value of skincare and colour cosmetics products in Thailand

The sales value of color cosmetics and skin care market in Thailand represents 47.38% of beauty and personal care market in Thailand in which the value accounted for approximately 3.4 billion USD in 2023.

The sales value of skin care products in Thailand valued around 2.6 billion USD, represents 77.1% of beauty and personal care market in Thailand. Through this amount, **Facial Care** shares the largest portion (60.3%), following with Body Care (9.9%), Skin Care Sets / Kits (1.9%), hand care (1.00%) and Lip Care (0.82%). It is expected to reach 3.34 billion USD in 2024 with 9-13% of growth rate.

Meanwhile, the sales value of color cosmetics is around 778.0 million USD with **Facial make-up** as the largest sector (12.9%), Lip make-up (5.21%), Eye make-up (3.65%), and nail products (0.21%), consequently. It is expected to reach 715.8 million USD at the end of 2024 with 10-13% of growth rate.

(Million USD, %)

Table 4: Sales of skin care and color cosmetics in Thailand by categories 2021-2023

Sales of skin care and color cosmetics in Thailand by categories 2021-2023						
	Value (Million USD)			Growth Rate (%)		2023 Market Share (%)
	2021	2022	2023	2022/21	2023/22	
Skincare						
Facial Care	2,074.1	2,306.6	2,054.21	11.21	-10.94	60.29
Body Care	284.6	313.2	338.84	10.05	8.19	9.94
Skin Care Sets / Kits	56.6	61.5	64.76	8.66	5.30	1.90
Hand Care	30.7	33.3	33.93	8.47	1.89	1.00
Lip Care	24.2	26.4	27.9	9.09	5.68	0.82
Color Cosmetics						
Facial Make-Up	309.2	323.1	441.00	4.50	36.49	12.94
Lip Products	129.9	132.5	177.6	2.00	34.04	5.21
Eye Make-Up	97.2	96.4	124.41	-0.82	29.06	3.65
Colour Cosmetics Sets / Kits	14.2	15	16.98	5.63	13.20	0.50
Nail Products	5.6	5.6	7.32	0.00	30.71	0.21
Total						
Skin Care	2,115.4	2,345.2	2,629.2	10.86	12.11	77.17
Colour Cosmetics	468.8	585.5	778.0	24.89	32.88	22.83

Color Cosmetics and Skin care	2,584.2	2,930.7	3,407.2	13.41	16.26	100
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Colour Cosmetics in Thailand, Skin Care in Thailand – Euromonitor International, April 2024 – ITA Bangkok Office

Brand shares of skincare and colour cosmetics products in Thailand

In 2023, Garnier brand (L'Oreal Groupe) shares the largest portion of the brand shares for **skincare products** in Thailand with 4.6% shares, following with Nivea from Beiersdorf AG (4.5%), Eucerin from Beiersdorf AG (4.1%), CeraVe from L'Oréal Groupe (2.7%), and Pond's from Unilever Thailand

Meanwhile, Maybelline New York (L'Oreal Groupe) shares the largest portion of the brand shares for **colour cosmetics products** with 6.7% shares, following with Oriental Princess from SSUP Group (4.3%), Giffarine from Giffarine Skyline Unity (3.7%), Chanel from Chanel (Thailand) Ltd (3.6%), and Shiseido from Shiseido (Thailand) Co Ltd (3.5%)

Figure 2: Brand shares of skincare products in Thailand 2023

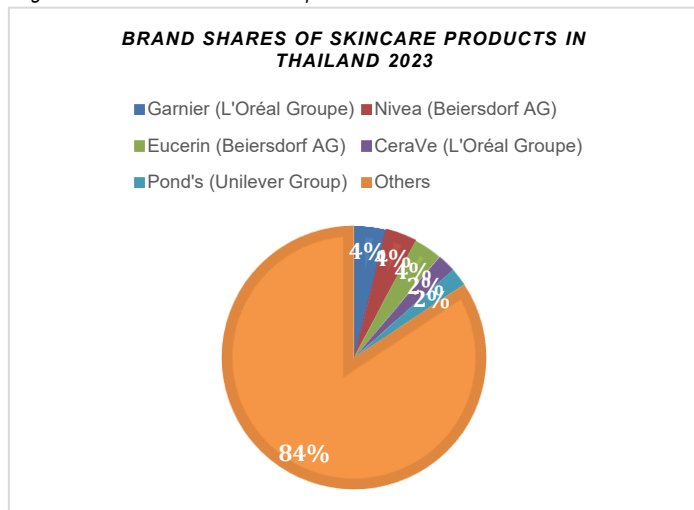
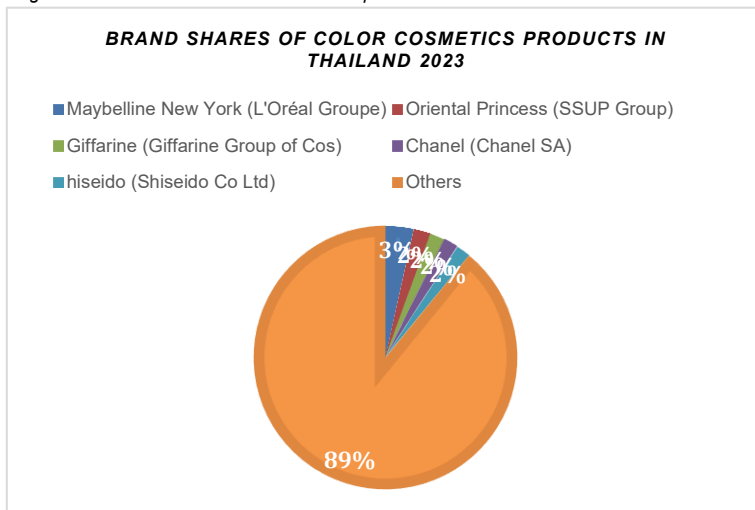


Figure 3: Brand shares of color cosmetics products in Thailand 2023



Skincare and cosmetics in Thailand, May 2023, Euromonitor International – ITA Bangkok Office

International trade of skincare and colour cosmetics products in Thailand

According to the information from Thailand Ministry of Commerce (MOC), the total trade value between Thailand and the world regarding skincare and colour cosmetics is 2.01 billion US dollars in 2023 (+14.53% CAGR), accounted for 33.13% of the overall trade value of beauty and personal care industry of Thailand.

Through this amount, the total trade value between Thailand and Italy of skincare and cosmetics reached 32.5 million US dollars in 2023 (+49.5% CAGR), accounted for 52.72% of total trade value between Thailand and Italy on beauty and personal care products.

HS 330410: Lip make-up preparations

HS 330420: Eye make-up preparations

HS 330430: Manicure or pedicure preparations

HS 330491: Other : - - Powders, whether or not compressed

HS 330499: - Other : - - Other :

33049920: - - - Anti-acne preparations

33049930: - - - Other face or skin creams and lotions

33049990: - - - Other

HS 330720: Personal deodorants and antiperspirants

HS 330730: Perfumed bath salts and other bath preparations

HS 330710: Pre-shave, shaving or after-shave preparations

HS 330790: - Other :

HS34011100: For toilet use (including medicated products)
HS34012090: Of a kind used for flotation de-inking of recycled paper

Import value of color cosmetic and skincare products to Thailand by country 2021-2023 / 2023-2024 (Jan-Apr)

The import value of cosmetic and skincare from the world to Thailand accounted for 863.59 million US dollars in 2023 (+16.52% CAGR).

Meanwhile, the total import value of cosmetics and skincare from Italy to Thailand is 31.97 million US dollars in 2023.

France appears as the first supplier with the largest market share of 18.26%, followed by South Korea, China, China, Indonesia, and USA with a significant market share of 16.7%, 12.36%, 11.03%, and 9.74%, respectively. Meanwhile, Italy ranked as the 7th largest supplier in this category with 3.7% SOM.

With contributions from free trade agreement with Thailand that provides for the reduction of import duties along with marketing and commercial affinities, beauty products from some countries especially East Asia countries (Japan, South Korea, China) still gaining momentum in Thai market.

(USD, %)

Table 5: Import value of color cosmetic and skincare products to Thailand by country 2021-2023 / 2023-2024 (Jan-Apr)

Import value of color cosmetic and skincare products to Thailand by country 2021-2023 / 2023-2024 (Jan-Apr)												
No	Country	Value (USD)					Market Share (%)			Growth Rate (%)		
		2021	2022	2023	January – Apr		2022	2023	2024 (Jan-Apr)	2022	2023	2024 (Jan-Apr)
					2023	2024						
1	FRANCE	80,921,968	101,952,421	157,696,173	80,819,682	48,867,406	13.76	18.26	14.40	25.99	54.68	-39.5
2	S.KOREA	87,952,713	103,004,990	144,257,555	46,173,994	54,547,910	13.90	16.70	16.08	17.11	40.05	18.14
3	CHINA	62,548,568	90,310,116	106,728,014	33,957,306	41,099,095	12.19	12.36	12.11	44.38	18.18	21.03
4	INDONESIA	84,173,045	91,232,942	95,227,163	32,130,811	31,403,351	12.31	11.03	9.26	8.39	4.38	-2.26
5	USA	84,794,869	79,333,135	84,081,450	32,983,290	30,776,059	10.70	9.74	9.07	-6.44	5.99	-6.69
6	JAPAN	103,231,999	84,777,844	81,715,675	31,926,379	37,164,672	11.44	9.46	10.95	-17.8	-3.61	16.41
7	ITALY	18,958,029	21,102,355	31,976,086	9,959,040	18,225,902	2.85	3.70	5.37	11.31	51.53	83.01
8	UK	24,987,627	17,749,104	19,698,261	7,491,360	18,989,338	2.39	2.28	5.60	-28.9	10.98	153.4
9	SINGAPORE	4,057,463	9,486,562	18,441,285	6,114,943	9,777,204	1.28	2.14	2.88	133.8	94.39	59.89
10	POLAND	10,090,428	13,951,477	16,581,039	5,209,959	4,050,508	1.88	1.92	1.19	38.26	18.85	-22.2
World		655,622,600	741,126,196	863,595,801	325,343,422	339,274,605	100	100	100	13.04	16.52	4.28

Thailand Ministry of Commerce – ITA Bangkok Office

Export value of color cosmetic and skincare products from Thailand by country 2021-2023 / 2023-2024 (Jan-Apr)

The export value of cosmetic and skincare from the world to Thailand accounted for 1.15 billion US dollars in 2023 (+13.08% CAGR).

Meanwhile, the total export value of cosmetics and skincare from Thailand to Italy is 547,905 US dollars in 2022 (~15% CAGR).

China is the most significant destination with the largest market share of 11.25%, followed by Australia, Myanmar, Philippines, and India with a significant market share of 8.30%, 7.88%, 7.37%, and 6.36%, respectively. Meanwhile, Italy ranked as the 62nd important destination in this category with 0.05% SOM.

(USD, %)

Table 6: Export value of color cosmetic and skincare products to Thailand by country 2021-2023 / 2023-2024 (Jan-Apr)

Export value of color cosmetic and skincare products to Thailand by country 2021-2023 / 2023-2024 (Jan-Apr)												
No	Country	Value (USD)					Market Share (%)			Growth Rate (%)		
		2021	2022	2023	January – April		2022	2023	2024 (Jan-Apr)	2022	2023	2024 (Jan-Apr)
					2023	2024						
1	CHINA	52,833,157	72,764,892	129,398,836	45,052,905	48,746,383	7.15	11.25	10.64	37.73	77.83	8.20
2	AUSTRALIA	81,722,261	86,242,684	95,472,017	30,357,645	35,021,609	8.48	8.30	7.65	5.53	10.70	15.36
3	MYANMAR	63,850,087	109,477,341	90,725,605	34,119,030	28,614,513	10.76	7.88	6.25	71.46	-17.1	-16.13
4	PHILIPPINES	59,991,429	77,311,679	84,798,460	28,042,003	28,481,631	7.60	7.37	6.22	28.87	9.68	1.57
5	INDIA	16,270,208	27,232,739	68,446,770	17,024,420	29,141,243	2.68	5.95	6.36	67.38	151.3	71.17
6	JAPAN	42,883,199	38,738,231	66,877,677	15,873,074	60,745,478	3.81	5.81	13.26	-9.67	72.64	282.7
7	HONG KONG	137,343,230	75,118,914	63,366,829	17,233,432	17,074,793	7.38	5.51	3.73	-45.3	-15.6	-0.92
8	MALAYSIA	39,294,624	58,111,291	58,847,740	20,794,355	17,449,371	5.71	5.11	3.81	47.89	1.27	-16.09
9	UK	63,740,784	63,147,210	57,162,211	16,643,276	11,631,876	6.21	4.97	2.54	-0.93	-9.48	-30.11
10	LAOS	42,107,868	43,672,782	53,462,776	17,367,260	20,782,168	4.29	4.65	4.54	3.72	22.42	19.66
62	ITALY	687,602	644,617	547,905	357,144	298,061	0.06	0.05	0.07	-6.25	-15.0	-16.54
	World	917,403,117	1,017,533,358	1,150,669,144	362,644,409	458,002,923	100	100	100	10.91	13.08	26.30

Thailand Ministry of Commerce – ITA Bangkok Office

Hair care products

Hair care in Thailand saw robust growth in 2023 due to the popularity of pampering and styling among Thai consumers. The market is driven by sophisticated at-home routines and a willingness to invest in innovative products like shampoos, conditioners, colorants, and hair loss treatments. Consumers are opting for high-end products promising salon-like experiences, with at-home hair coloring seen as a cost-effective choice over salon services.

The premiumisation trend in hair care was driven by increasing consumer knowledge and set to expand throughout category. Established brands invested in advanced formulas with new active ingredients to meet sophisticated demands. Consumers favored herbal, natural, and eco-friendly products. This trend drives hair care growth, with high-value products gaining sales. Mass brands will introduce premium variants with quality ingredients, boosting their appeal.

Also, hair care industry saw healthy growth with innovative products and digitalization. Thai consumers embraced advanced formulas, sophisticated routines, and high-end products, driving brands to develop and launch more complex products. In this case, ingredient-led developments will become more prominent. During the forecast period, significant progress in the hair care category is expected through product developments, particularly with natural and botanical ingredients like jojoba oil, sunflower seed, biotin, macadamia, spirulina, and vitamin E.

Clean beauty trends and organic products will drive hair care growth, with Lolane pioneering chemical-free innovations and sustainable practices. Brands will cater to Thai consumers' intricate hair care routines. Unlike other beauty sectors, hair care sees a rise in specialized products like serums, especially for color-treated hair, as more consumers embrace coloring and seek healthier results.

Sales value of hair care products in Thailand

Hair care market in Thailand ranked as the second largest sector in beauty and personal care market in Thailand. The shares of sales value of hair care in Thai market is approximately 1,151.38 million USD in 2023 (+11.91% CAGR) of which **Shampoos** products occupied the largest proportion of hair market value (47.25%), following with conditioners and treatments (18.6%), salon professional (15.48%), and colourants (13.9%), consequently.

The sales value is expected to reach 1.18 billion USD in 2024 with 6-9% of growth rate.

(Million USD, %)

Table 7: Sales of hair care in Thailand by categories 2021-2023

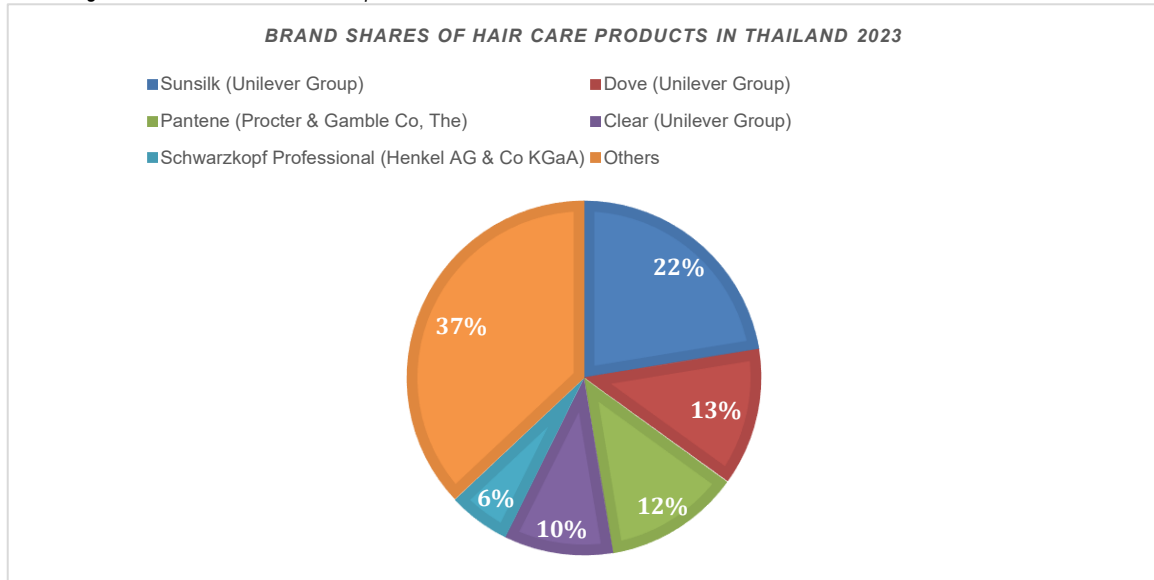
Sales of hair care in Thailand by categories 2021-2023						
	Value (Million USD)			Growth Rate (%)		2023 Market Share (%)
	2021	2022	2023	2022/21	2023/22	
Shampoos	457.6	499.6	544.03	9.18	8.89	47.25
Conditioners and Treatments	171.3	189.8	214.99	10.80	13.27	18.67
Salon Professional Hair Care	137.8	153.0	178.18	11.03	16.46	15.48
Colourants	122.6	139.7	160.02	13.95	14.55	13.90
Styling Agents	33.4	36.7	43.46	9.88	18.42	3.77
Perms and Relaxants	7.4	7.8	8.42	5.41	7.95	0.73
Hair Loss Treatments	2.1	2.2	2.24	4.76	1.82	0.19
Hair Care	932.3	1,028.8	1,151.38	10.35	11.91	100

Hair Care in Thailand, May 2023, Euromonitor International – ITA Bangkok Office

Brand shares of hair care products in Thailand

In 2023, Sunsilk brand (Unilever Group) shares the largest portion of the brand shares for hair care products in Thailand with 14.5% shares, following with Dove from Unilever Group (8.1%), Pantene from Procter & Gamble (8.0%), Clear from Unilever Group (6.4%), and Schwarzkopf Professional from Henkel AG & Co KGaA (3.7%).

Figure 4: Brand shares of hair care products in Thailand 2023



Reference: Hair Care in Thailand, May 2023, Euromonitor International – ITA Bangkok Office

International trade of hair care products in Thailand

According to the information from Thailand Ministry of Commerce (MOC), the total trade value between Thailand and the world regarding hair products is 794.85 million US dollars in 2023 (+0.75% CAGR), accounted for 13.07% of total beauty and personal care trade of Thailand.

Through this amount, the total trade value between Thailand and Italy of hair care products reached 3.22 million US dollars in 2023 (-12.3% CAGR), accounted for 5.22% of total beauty and personal care trade between Thailand and Italy.

HS 330510: Shampoo

HS 330520: Preparations for permanent waving or straightening

HS 330530: Hair lacquers

HS 330590: - Other

Import value of hair care products to Thailand by country 2021-2023 / 2023-2024 (Jan-Apr)

The import value of hair care from the world to Thailand accounted for 79.79 million US dollars in 2023 (-0.97% CAGR).

Meanwhile, the total import value of hair care products from Italy to Thailand is 3.21 million US dollars in the same year (-12.31% CAGR).

China appears as the first supplier with the largest market share of 25.71%, followed by Japan, Indonesia, USA, and South Korea with a significant market share of 15.18%, 14.37% and 10.87%, respectively. Meanwhile, Italy ranked as the 7th largest supplier in this category with 4.03% SOM.

(USD, %)

Table 8: Import value of hair care products to Thailand by country 2021-2023 / 2023-2024 (Jan-Apr)

Import value of hair care products to Thailand by country 2021-2023 / 2023-2024 (Jan-Apr)												
No.	Country	Value (USD)					Market Share (%)			Growth Rate (%)		
		2021	2022	2023	January – April		2022	2023	2024 (Jan-Apr)	2022	2023	2024 (Jan-Apr)
					2023	2024						
1	CHINA	15,819,606	22,897,206	20,519,421	8,486,478	6,687,402	28.42	25.71	26.78	44.74	-10.4	- 21.20
2	JAPAN	10,225,941	11,939,229	12,114,033	3,880,961	4,487,095	14.82	15.18	17.97	16.75	1.46	15.62
3	INDONESIA	8,784,982	10,093,600	11,465,047	4,046,773	3,223,743	12.53	14.37	12.91	14.90	13.59	- 20.34
4	USA	6,505,150	8,973,039	8,670,470	2,770,860	2,368,963	11.14	10.87	9.49	37.94	-3.37	- 14.50
5	S.KOREA	5,209,389	5,669,165	4,646,137	1,795,123	1,483,943	7.04	5.82	5.94	8.83	-18.0	- 17.33
6	INDIA	1,505,158	1,840,588	3,576,509	894,570	1,154,106	2.28	4.48	4.62	22.29	94.31	29.01
7	ITALY	2,038,972	3,667,813	3,216,189	894,762	706,207	4.55	4.03	2.83	79.89	-12.3	- 21.07
8	SPAIN	1,092,062	1,744,292	2,712,713	990,630	997,314	2.16	3.40	3.99	59.72	55.52	0.67
9	GERMANY	1,694,666	2,172,268	2,586,452	1,232,850	588,120	2.70	3.24	2.36	28.18	19.07	- 52.30
10	FRANCE	2,523,845	2,360,646	2,519,577	885,137	689,320	2.93	3.16	2.76	-6.47	6.73	- 22.12
World		61,366,023	80,581,353	79,798,458	28,820,053	24,971,891	100	100	100	31.31	-0.97	- 13.35

Thailand Ministry of Commerce – ITA Bangkok Office

Export value of hair care products from Thailand by country 2021-2023 / 2023-2024 (Jan-Apr)

The export value of hair care products from the world to Thailand accounted for 715.05 million US dollars in 2023 (0.94% CAGR).

Meanwhile, the total export value of hair care products from Thailand to Italy is 4,352 US dollars in 2023 (-0.87% CAGR), accounted for 0.00013% of total export value regarding beauty and personal care product from Thailand to Italy.

Japan is the most significant destination with the largest market share of 25.7%, followed by Philippines, Australia, Vietnam, and Malaysia with a significant market share of 14.41%, 10.72%, and 9.4%, respectively. Meanwhile, Italy ranked as the 84th significant destination in this category with 0.0006% SOM.

(USD, %)

Table 9: Export value of hair care products to Thailand by country 2021-2023 / 2023-2024 (Jan-Apr)

Export value of hair care products to Thailand by country 2021-2023 / 2023-2024 (Jan-Apr)												
No.	Country	Value (USD)					Market Share (%)			Growth Rate (%)		
		2021	2022	2023	January – April		2022	2023	2024 (Jan-Apr)	2022	2023	2024 (Jan-Apr)
					2023	2024						
1	JAPAN	220,215,642	182,582,005	183,858,557	55,720,859	49,259,926	25.77	25.71	23.01	-17.1	0.70	-11.6
2	PHILIPPINES	111,036,097	106,940,515	103,012,058	34,084,505	23,848,014	15.10	14.41	11.14	-3.69	-3.67	-30.0
3	AUSTRALIA	57,288,527	71,232,071	76,634,691	24,013,687	34,193,204	10.06	10.72	15.97	24.34	7.58	42.39
4	VIETNAM	63,866,173	68,940,144	67,180,827	23,333,795	18,301,859	9.73	9.40	8.55	7.94	-2.55	-21.5
5	MALAYSIA	39,440,573	58,756,054	53,386,098	17,617,273	16,897,142	8.29	7.47	7.89	48.97	-9.14	-4.09
6	S.KOREA	32,476,988	32,403,879	39,775,062	12,759,614	11,730,793	4.57	5.56	5.48	-0.23	22.75	-8.06
7	CAMBODIA	33,468,895	36,035,175	36,428,358	12,779,263	12,894,940	5.09	5.09	6.02	7.67	1.09	0.91
8	LAOS	27,187,412	22,603,985	26,850,592	10,416,292	9,311,255	3.19	3.76	4.35	-16.86	18.79	-10.6
9	SINGAPORE	25,749,794	22,859,934	25,309,202	8,851,355	7,179,115	3.23	3.54	3.35	-11.2	10.71	-18.9
10	MYANMAR	23,054,498	19,776,306	21,649,541	7,840,435	5,353,912	2.79	3.03	2.50	-14.2	9.47	-31.7
84	ITALY	9,984	4,390	4,352	3,589	1,354	0.0014	0.0006	0.0008	-56.0	-0.87	-62.2
	World	717,844,846	708,370,675	715,053,626	233,525,648	214,066,912	100	100	100	-1.32	0.94	-8.33

Thailand Ministry of Commerce – ITA Bangkok Office

Fragrances

In 2023, fragrance growth in Thailand was fueled by the return to pre-pandemic lifestyles, boosting demand in premium and mass segments. The presence of international tourists further supported this growth. The category saw new product developments, including expansions by existing brands and the emergence of new competitors.

Premium fragrance channel development in Thailand included pop-up stores, multi-brand outlets, and beauty specialist retailers. Separate brand counters under one roof are becoming rare. The pandemic prompted brands to innovate and diversify beyond fragrances. Despite the category's recovery, brands are expanding into beauty, personal care, and other sectors. Examples include Penhaligon's developing bath, body, and home products, Coty expanding its offerings in response to premium segment demand, and Maison Margiela's flagship store offering an interactive shopping experience for fragrance, home products, and body care items.

Fragrances in Thailand will benefit from the growing focus on self-care and emotional well-being, driving consumers to incorporate fragrances into their daily routines to enhance positive moods and feelings, ensuring sustained sales growth. Brands are expected to shift away from traditional gender-based marketing, focusing more on ingredients and narratives to align with consumer values. Sustainability will play a significant role in the fragrance industry, with refillable packaging becoming more prevalent to address environmental concerns. Brands like Prada, Guerlain, Lancôme, and Chloé are already implementing sustainable practices, using recycled materials and natural ingredients to meet consumer demand for eco-friendly options. However, growth may be hindered by counterfeit products and increased competition from other product categories.

Sales value of fragrance in Thailand

Fragrance market in Thailand has an estimated sales value around 334.51 million USD in 2023. The market value is expected to reach 360 million USD in 2024 with 7-10% of growth rate.

According to data processed by Euromonitor, in 2023, **Mass Fragrances** products recorded the highest sales volume (205.18 million USD) compared to Premium Fragrances (129.32 million USD).

(Million USD, %)

Table 10: Sales of Fragrance in Thailand by categories 2021-2023

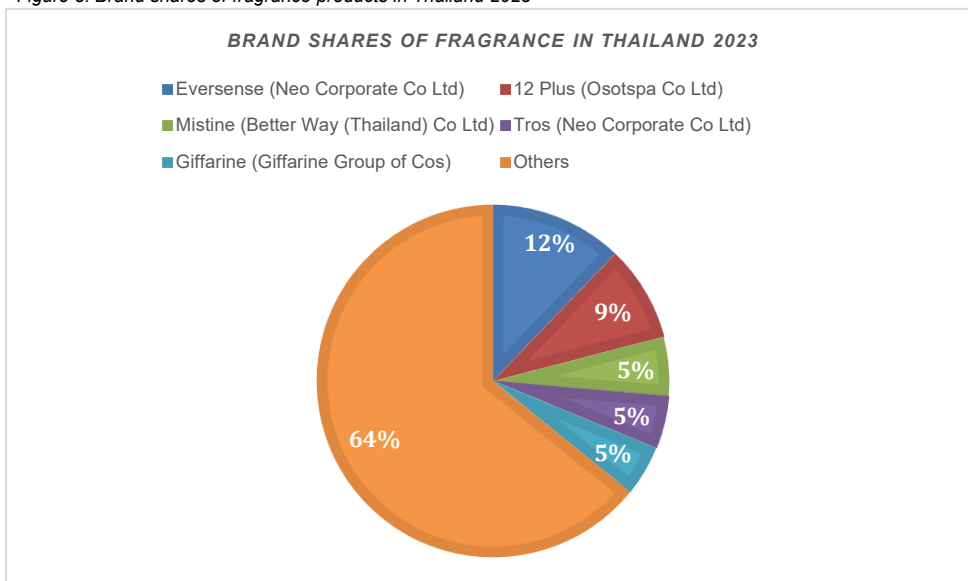
Sales of Fragrance in Thailand by categories 2021-2023						
	Value (Million USD)			Growth Rate (%)		2023 Market Share (%)
	2021	2022	2023	2022/21	2023/22	
Premium Fragrances	88.2	102.4	129.32	16.10	26.29	38.66
Mass Fragrances	149.2	164.7	205.18	10.39	24.58	61.34
Fragrances	237.4	267.1	334.51	12.51	25.24	100

Fragrance in Thailand, May 2023, Euromonitor International – ITA Bangkok Office

Brand shares

In 2023, Eversense (Neo Corporate Co Ltd) shares the largest portion of the brand shares for fragrance products in Thailand with 10.2% shares, following with Pantene from 12 Plus from Osotspa Co., Ltd.) (7.0%), Mistine (Better Way (Thailand) Co., Ltd.) (6.3%), Giffarine from Giffarine Group (5.02%), and Jo Malone London from Estée Lauder Cos Inc) (4.23%).

Figure 5: Brand shares of fragrance products in Thailand 2023



Reference: Fragrance in Thailand, May 2023, Euromonitor International – ITA Bangkok Office

International trade fragrance in Thailand

According to the information from Thailand Ministry of Commerce (MOC), the total trade value between Thailand and the world regarding fragrance is 248.8 million US dollars in 2023 (+55.17% CAGR).

Through this amount, the total trade value between Thailand and Italy of fragrance reached 7.4 million US dollars in 2023 (+53.4% CAGR)

HS 3303: Perfumes and toilet waters

Import value of fragrance to Thailand by country (HS3303) 2021-2023 / 2023-2024 (Jan-Apr)

The import value of fragrance from the world to Thailand accounted for 248.79 million US dollars in 2023 (+187.2% CAGR). Registering 55.17% increase.

Meanwhile, the total import value of fragrance from Italy to Thailand is 7.4 million US dollars, increasing by 53.4% in 2023 (+432.41% CAGR), and a market share about 3%

France appears as the first supplier with the largest market share of 33.21%, followed by China, India, Spain and USA with a significant market share of 13.01%, 7.4%, 6.43% and 5.74% respectively.
(USD, %)

Table 11: Import value of fragrance products to Thailand by country (HS3303) 2021-2023 / 2023-2024 (Jan-Apr)

Import value of fragrance products to Thailand by country 2021-2023 / 2023-2024 (Jan-Apr)												
No.	Country	Value (USD)					Market Share (%)			Growth Rate (%)		
		2021	2022	2023	January – April		2022	2023	2024 (Jan-Apr)	2022	2023	2024 (Jan-Apr)
					2023	2024						
1	FRANCE	20,468,036	60,853,119	82,634,712	37,639,539	24,120,402	37.95	33.21	62.90	197.31	35.79	-35.92
2	CHINA	2,805,695	9,669,229	32,362,511	1,895,100	989,829	6.03	13.01	3.17	244.63	234.70	-47.77
3	INDIA	1,227,378	10,443,673	18,419,898	252,565	242,509	6.51	7.40	0.42	750.89	76.37	-3.98
4	SPAIN	3,156,666	11,081,498	15,991,954	6,297,721	3,155,829	6.91	6.43	10.52	251.05	44.31	-49.89
5	USA	2,089,415	9,101,024	14,277,104	4,367,028	4,813,845	5.68	5.74	7.30	335.58	56.87	10.23
6	UK	1,675,316	6,975,165	10,433,429	3,871,007	2,800,635	4.35	4.19	6.47	316.35	49.58	-27.65
7	S. KOREA	333,155	7,130,402	8,833,981	26,868	57,550	4.45	3.55	0.04	2,040.27	23.89	114.20
8	ITALY	2,251,258	4,823,719	7,399,406	2,682,475	1,686,321	3.01	2.97	4.48	114.27	53.40	-37.14
9	RUSSIA	92,267	1,420,069	6,736,027	0	0	0.89	2.71	0.00	1439.09	374.35	0.00
10	MYANMAR	1,219,668	3,025,044	4,786,014	0	0	1.89	1.92	0.00	148.02	58.21	0.00
	World	49,453,864	160,339,991	248,797,452	59,836,780	38,939,238	100	100	100	224.22	55.17	-34.92

Thailand Ministry of Commerce – ITA Bangkok Office

Export value of fragrance from Thailand by country (HS3303) 2021-2023 / 2023-2024 (Jan-Apr)

The export value of fragrance from the world to Thailand accounted for 116.60 million US dollars in 2023 (+300.4% CAGR).

Meanwhile, the total export value of fragrance products from Thailand to Italy is 270,673 US dollars in 2023 (+627.32% CAGR).

China is the most significant destination with the largest market share of 24.56%, followed by India, South Korea, Russia, and Myanmar with a significant market share of 15.32%, 7.51%, 5.78% and 4.1%, respectively.

(USD, %)

Table 12: Export value of fragrance to Thailand by country (HS3303) 2021-2023 / 2023-2024 (Jan-Apr)

Export value of fragrance to Thailand by country (HS3303) 2021-2023 / 2023-2024 (Jan-Apr)												
No.	Country	Value (USD)					Market Share (%)			Growth Rate (%)		
		2021	2022	2023	January – April		2022	2023	2024 (Jan-Apr)	2022	2023	2024 (Jan-Apr)
					2023	2024						
1	CHINA	784,715	6,331,987	28,640,460	6,881,606	12,036,715	10.29	24.56	18.04	706.92	352.31	74.91
2	INDIA	122,200	9,504,921	17,865,580	5,238,186	7,473,787	15.44	15.32	13.73	7678.17	87.96	42.68
3	S. KOREA	305,429	7,105,480	8,751,884	3,391,140	2,120,690	11.54	7.51	8.89	2226.39	23.17	-37.46
4	RUSSIA	92,208	1,419,773	6,736,027	3,211,623	4,609,250	2.31	5.78	8.42	1439.75	374.44	43.52
5	MYANMAR	1,219,668	3,025,044	4,786,014	1,587,853	1,544,704	4.91	4.10	4.16	148.02	58.21	-2.72
6	JAPAN	642,364	2,264,148	4,218,387	1,350,563	2,643,120	3.68	3.62	3.54	252.47	86.31	95.71
7	UK	802,182	2,262,751	3,735,847	1,362,360	676,509	3.68	3.20	3.57	182.07	65.10	-50.34
8	VIETNAM	98,382	1,828,699	2,989,245	931,349	621,848	2.97	2.56	2.44	1758.77	63.46	-33.23
9	FRANCE	256,752	968,985	2,767,626	1,176,531	855,260	1.57	2.37	3.08	277.40	185.62	0.00
10	TAIWAN	303,198	848,631	2,609,071	804,626	826,445	1.38	2.24	2.11	179.89	207.44	0.00
36	ITALY	19,248	139,994	270,673	270,672	89,294	0.23	0.23	0.71	627.32	93.35	0.00
World		15,374,846	61,558,841	116,608,811	38,137,655	48,053,801	100	100	100	300.39	89.43	26.00

Thailand Ministry of Commerce – ITA Bangkok Office

Distribution Channel of beauty and personal care products in Thailand

2023 marked the full return to store-based retailers for Thai consumers when it came to making purchases within beauty and personal care. However, ongoing digitalization ensured that the e-commerce distribution channel retained its significance, with growth spurred by the popularity of social media and aggressive marketing promotions and campaigns by brands and retailers.

Despite the post-pandemic return to store-based outlets, local consumers continue to show a preference for online shopping, supporting the shift to e-commerce and its persistent rise. Meanwhile, offline, both mass and premium brands have been gearing up their in-store presence.

Table 13: Distribution channel of beauty and personal care in Thailand by categories (%) 2023 (%)

Distribution channel of beauty and personal care in Thailand by categories (%) 2023				
	Color cosmetics	Skin care	Hair care	Fragrance
Retail Channels	100	100	88.7	100
Retail Offline	79.1	83.7	79.0	93.2
- Grocery Retailer	13.9	25.4	46.9	23.8
- - Convenience Retail	7.8	5.9	12.0	7.9
- - - Convenience Stores	7.1	5.3	10.9	7.4
- - - Forecourt Retailers	0.7	0.6	1.1	0.5
- - Supermarkets	4.4	8.6	13.8	6.3
- - Hypermarkets	1.5	9.3	14.0	8.8
- - Small Local Grocers	0.2	1.6	7.1	0.8
- Non-Grocery Retailers	25.5	41.5	30.5	55.6
- - General Merchandise Stores	14.1	11.8	1.1	25.4
- - - Department Stores	14.1	11.8	1.1	25.4
- - Health and Beauty Specialist	25.5	29.5	28.2	26.4
- - - Beauty Specialists	13.8	14.3	13.3	23.4
- - - Pharmacies	1.6	5.6	6.3	0.5
- - - Health and Personal Care Stores	10.1	9.7	8.6	2.6
- - Other Non-Grocery Retailers	7.6	-	1.1	3.7
- Direct Selling	18.1	16.7	1.6	13.9
Retail E-Commerce	20.9	16.3	9.7	6.8
Non-retail channels	-	-	11.3	-
Hair Salons	-	-	11.3	-

Beauty and Personal Care in Thailand - Euromonitor International, May 2023 - ITA Bangkok Office

In overall perspective, **health and beauty specialist store** ranked as the largest distribution channel for color cosmetics (25.5%), skin care (29.5%), and hair care (28.2%), while **department store** is the most popular distribution channel for fragrance (26.4%)

Import duties

- Cosmetic products
 - HS 3304: Beauty or make-up preparations and preparations for the care of the skin (other than medicaments), including sunscreen or suntan preparations; manicure or pedicure preparations
Import duty of 30 + VAT of 7
 - HS3307: Pre-shave, shaving or after-shave preparations, personal deodorants, bath preparations, depilatories and other perfumery, cosmetic or toilet preparations, not elsewhere specified or included; prepared room deodorisers, whether or not perfumed or having disinfectant properties.
Import duty of 20 + VAT of 7
 - HS 3401: Soap; organic surface-active products and preparations for use as soap, in the form of bars, cakes, moulded pieces or shapes, whether or not containing soap; organic surface-active products and preparations for washing the skin, in the form of liquid or cream and put up for retail sale, whether or not containing soap; paper, wadding, felt and nonwovens, impregnated, coated or covered with soap or detergent.
Import duty of 10 + VAT of 7

- Hair products
 - HS3305: Preparations for use on the hair.
 - Import duty of 20 + VAT of 7
- Fragrance products (HS3303)
 - HS3303: Perfumes and toilet waters
 - Import duty of 30 + VAT of 7
- Oral or dental hygiene (HS3306)
 - HS3306: Preparations for oral or dental hygiene, including denture fixative pastes and powders; yarn used to clean between the teeth (dental floss), in individual retail packages.
 - Import duty of 20 + VAT of 7

Product registration

To export products under HS code 3304, 3307, 3401, 3305, and 3303 to Thailand, import license from the **Food and Drug Administration** (www.fda.moph.go.th) is required for importer.

Thai Food and Drug Administration is responsible for protecting the public health by ensuring the safety, efficacy, and security of human and veterinary drugs, biological products, and medical devices; and by ensuring the safety of the nation's food supply, cosmetics, and products that emit radiation.

Sources:

- Beauty and Personal Care in Thailand, May 2024, Euromonitor International
- Colour Cosmetics in Thailand, May 2024, Euromonitor International
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- Hair Care in Thailand, May 2024, Euromonitor International
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- Thailand Ministry of Commerce (MOC)

ICE BANGKOK, June 2024



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