Business Overview

- **Thailand's Home Care market continued to expand, recording an average annual growth rate of 2.3% during 2018–2025, with market value reaching approximately THB 67.4 billion in 2025**, up from THB 57.3 billion in 2018. Although the market contracted by 4.1%YoY and 0.4%YoY in 2020 and 2021, respectively, it subsequently returned to a sustained recovery path. Home Care products could be classified into five major categories by usage, with Laundry Care accounting for the largest share at 62.8% of total market value, underscoring the market's strong concentration in fabric care products. This was followed by Surface Care (10.8%), Dishwashing (9.7%), Air Care (8.6%), and Home Insecticides (8.0%).

Figure 1 Home Care Market Value

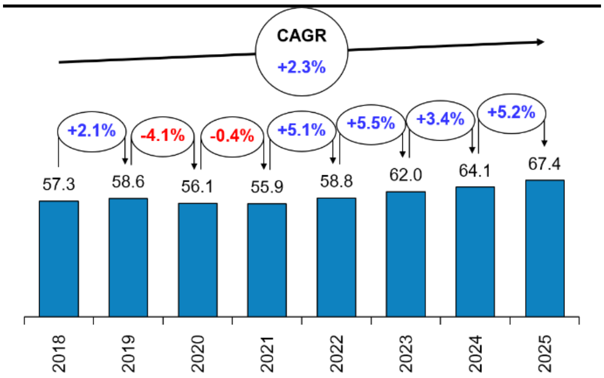
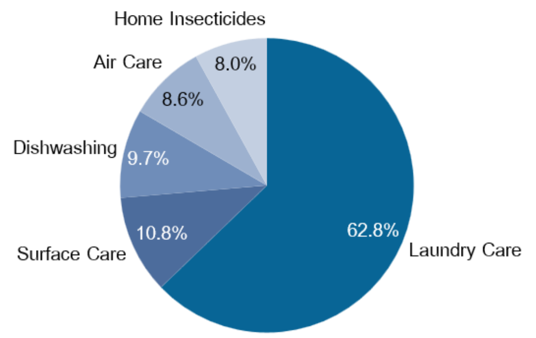


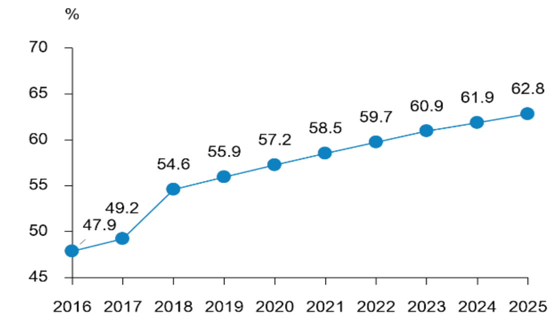
Figure 2 Home Care Market Value Share by Product Category, 2025



Source: Compiled by LH Bank Business Research

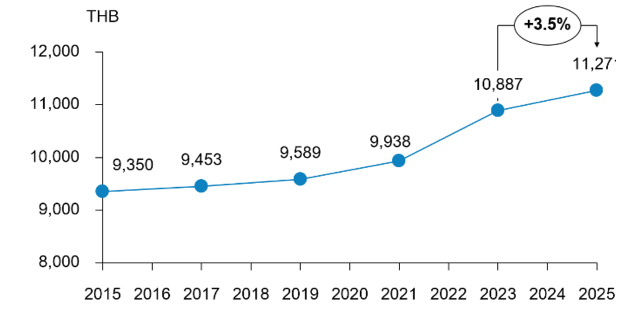
- **Market growth was supported by continued urbanization, with the urban population accounting for 62.8% of Thailand's total population in 2025, alongside rising average monthly income per capita and increasing consumer emphasis on hygiene and cleanliness.** Demand within Laundry Care increasingly shifted toward products offering additional functional benefits, including fragrance, fabric care, antibacterial properties, and skin-friendly formulations. Meanwhile, consumers of Surface Care and Dishwashing products increasingly prioritized cleaning efficacy alongside safety, gentleness, and environmentally friendly ingredients. Nevertheless, value for money remained a key purchasing consideration as consumers continued to be highly price sensitive. At the same time, purchasing behavior increasingly shifted toward an omnichannel model, intensifying competition in promotions as well as product differentiation and distinctive product attributes.

Figure 3 Thailand's Urban Population as a Share of Total Population



Source: World Bank

Figure 4 Thailand's Average Monthly Income per Capita



Source: National Statistical Office

Production and Sales Overview

- **Thailand's Home Care production and sales volumes generally expanded in recent years**. Production volumes of Laundry Detergent, Fabric Softener, and Dishwashing Liquid recorded average annual growth of 1.9%, 2.7%, and 1.7%, respectively, during 2021–2025. In the first six months of 2026, Laundry Detergent production slowed, while Fabric Softener and Dishwashing Liquid continued to expand from the same period of the previous year. Total sales volume grew by an average of 2.1% per year during 2021–2025, reaching approximately 1.17 million tons in 2025. The domestic market remained the key demand base, accounting for approximately 94.5% of total sales volume, while exports represented around 5.5%. Exports of washing and cleaning products were concentrated in ASEAN markets, with Vietnam (15.8%), Laos (11.4%), and China (10.0%) among the major destinations. Meanwhile, imports of washing and cleaning products were primarily sourced from China, which accounted for 38.3% of total import value in 2025. This reflected Thailand's substantial domestic production base, while imports continued to serve selected areas of domestic demand.

Figure 5 Home Care Production Volume by Product Category

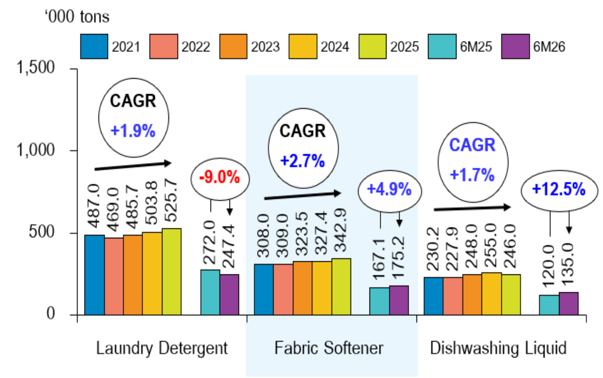
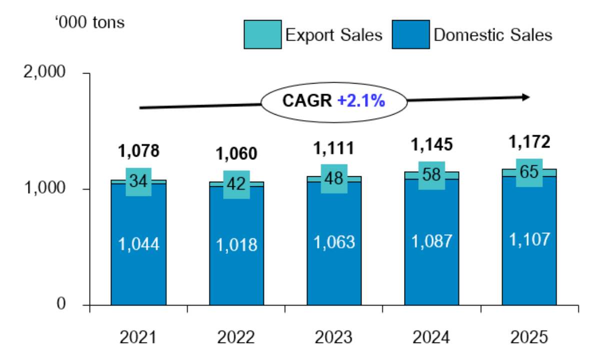


Figure 6 Home Care Sales Volume: Domestic and Export



Source: OIE

Note: Based on TSIC 20231

Figure 7 Thailand's Export Value Share of Washing and Cleaning Products in 2025

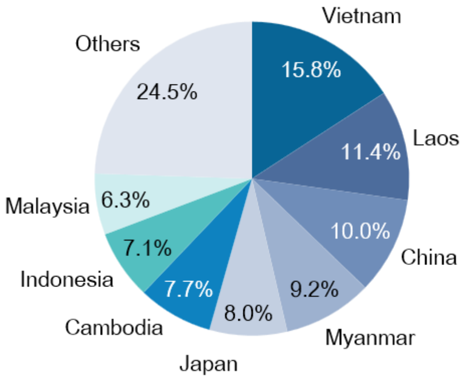
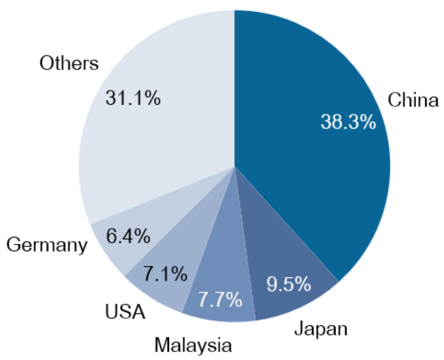


Figure 8 Thailand's Import Value Share of Washing and Cleaning Products in 2025



Source: MOC

Note: Based on Customs Tariff Code 3402 (organic surface-active agents, other than soap, including surface-active preparations, washing preparations, and cleaning preparations)

Competitive Landscape

- **Thailand's Home Care market remained relatively concentrated among large players, with the top five companies accounting for a combined 66.5% of total market value in 2025.** Unilever remained the market leader with a 30.1% value share, followed by Procter & Gamble (11.7%), SC Johnson & Son (8.7%), IP One (8.2%), and Lion (7.8%). Among the top 10 players, most were multinational companies, with only two Thai companies—IP One and Neo Corporate—highlighting the dominant role of foreign players in Thailand's Home Care market. Each company-maintained strengths across different product categories, although most had core product portfolios concentrated in Laundry Care and Surface Care. Reckitt Benckiser was the only major player whose Home Care portfolio covered all five product categories.
- **At the brand level, 8 of the top 10 brands in 2025 were Laundry Care products, highlighting the category's significant role in Thailand's Home Care market.** Unilever had the largest number of brands among the top 10, with four brands—Breeze, Omo, Comfort, and Sunlight. Breeze held the largest market value share at 14.8%, followed by Downy at 10.4%, Fineline at 5.5%, Hygiene at 5.5%, and Omo at 5.0%. Other categories represented among the top 10 included Sunlight in Dishwashing and Glade in Air Care. Brands outside the top 10 collectively accounted for 39.6% of total market value, indicating that competition from other brands remained significant despite the strong market positions of leading brands.

Figure 9 Home Care Market Share by Company in 2025

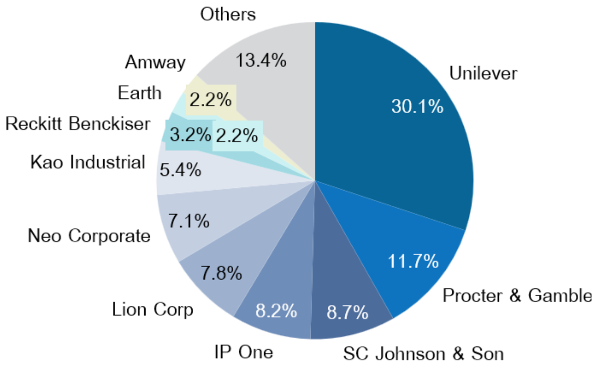


Table 1 Brand Share of Home Care Products 2025 (Top 10)

Rank	Brand	Product	Company	%Share of Total
1	Breeze	Laundry Care	Unilever	14.8
2	Downy	Laundry Care	Procter & Gamble	10.4
3	Fineline	Laundry Care	Neo Corporate	5.5
4	Hygiene	Laundry Care	IP One	5.5
5	Omo	Laundry Care	Unilever	5.0
6	Comfort	Laundry Care	Unilever	5.0
7	Sunlight	Dishwashing	Unilever	4.8
8	Attack	Laundry Care	Kao Industrial	3.7
9	Glade	Air Care	SC Johnson & Son	3.0
10	Pao	Laundry Care	Lion Corp	2.7
	Others			39.6

Source: Compiled by LH Bank Business Research

Table 2 Home Care Product Portfolio of Leading Companies by Segment

Company	Parent Country	Laundry Care	Surface Care	Dishwashing	Air Care	Home Insecticides
Unilever Thai Holdings Ltd		✓ Breeze, Omo, Comfort	✓ Promax, Vim	✓ Sunlight	-	-
Procter & Gamble (Thailand) Co Ltd		✓ Downy	-	-	✓ Ambi Pur	-
SC Johnson & Son (Thailand) Co Ltd		-	✓ Duck, Mr Muscle	-	✓ Glade	✓ Baygon, Raid
IP One Co Ltd		✓ Hygiene	✓ Vixol, Whiz	-	-	-
Lion Corp (Thailand) Ltd		✓ Pao, Essence, Fresh & Soft, Pro	✓ Look	✓ Lipon F	-	-
Neo Corporate PCL		✓ Fineline, Smart	✓ Tomi	✓ Smart	-	-
Kao Industrial (Thailand) Co Ltd		✓ Attack	✓ Magiclean, Haiter	-	-	-
Reckitt Benckiser (Thailand) Ltd		✓ Vanish	✓ Harpic, Dettol	✓ Finish	✓ Air Wick	✓ Mortein
Earth (Thailand) Co Ltd		-	-	-	✓ Oasis, Daily Fresh	✓ ARS

Source: Compiled by LH Bank Business Research

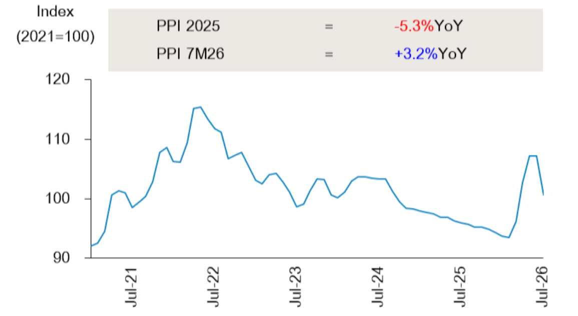
Business Outlook

- **Thailand's Home Care business is expected to continue expanding over the next year, supported by the essential nature of these products, continued urbanization, and growing demand for hygiene, convenience, and products that better meet specific usage needs.** Nevertheless, market growth will remain constrained by the gradual recovery in consumer purchasing power and persistently high price sensitivity. As a result, consumers are expected to place greater emphasis on price comparisons, promotions, and value for money before making purchasing decisions.

.

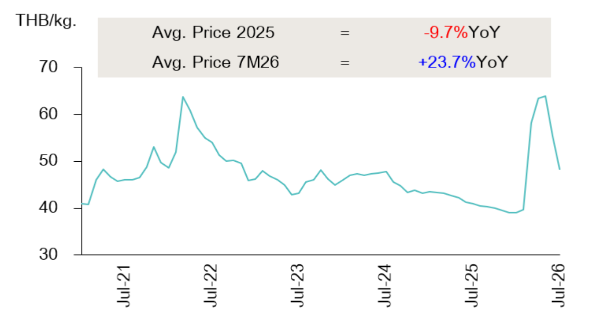
- **Competition is set to intensify across pricing, promotional activities, and new product development as companies seek to gain market share and respond to rapidly evolving consumer preferences.** Large players will continue to benefit from economies of scale, strong brand equity, and extensive distribution networks, while smaller players are expected to accelerate market share expansion through product development and promotional strategies. Despite the high market concentration among major companies, competition at brand level will remain intense as consumers increasingly prioritize product quality, safety, gentleness, environmental friendliness, and value for money. At the same time, online channels, particularly Social Commerce, are playing a growing role in product discovery, reviews, price comparisons, and purchasing decisions, requiring operators to place greater emphasis on pricing management, promotional strategies, and differentiation at both the product and brand levels.
- **Meanwhile, operators' profitability will remain exposed to volatility in chemical raw material and packaging costs.** During the first seven months of 2026, the producer price index for chemicals and chemical products returned to growth, rising by 3.2%YoY, while average HDPE resin prices increased by 23.7%YoY. This was partly driven by heightened geopolitical uncertainty in the Middle East, which increased volatility in crude oil prices and upstream petrochemical feedstock costs, as well as supply and shipping risks through the Strait of Hormuz. As a result, producers are likely to face higher raw material and packaging costs, which could put pressure on margins if these cost increases cannot be fully passed through to selling prices. Operators should therefore place greater emphasis on raw material and packaging cost management, supplier diversification to mitigate supply risks, and the development of higher-value-added products to strengthen cost pass-through capability and preserve margins.

Figure 10 Producer Price Index: Chemicals and Chemical Products



Source: TPSO

Figure 11 Domestic HDPE Resin Prices in Thailand



Source: Plastics Intelligence Unit

Authors:

Tanyaporn Laosopapirom (tanyapornl@lhbank.co.th)

Business Research,

Land and Houses Bank PLC

LH BANK BUSINESS RESEARCH

Thanapol Srithanpong, Ph.D.
Head of Business Research

Cheawchan Srichaiya
Senior Industrial Specialist

Wilanda Disorntetiwat
Senior Economist

Watcharapan Niyom
Senior Industrial Specialist

Tanyaporn Laosopapirom
Senior Economist

Sri-Ampai Ingkhakitti
Senior Industrial Specialist

Nawatch Hansuvech
Senior Thematic Specialist

Pharadon Heemmuden
Senior Industrial Specialist

LH Bank Business Research

ACTIVE INCLUSIVE DECISIVE

Scan Here
For More Articles
https://www.lhbank.co.th/economic-analysis/