MARKET OF THAI HERBAL COSMETICS FOR BRAND STRATEGIES

Sasaphon Moongvicha
Faculty of Business Administration
Rajamangala University of Technology Phra Nakhon
86 Pitsanulok, Dusit, Bangkok 10300, Thailand

ABSTRACT - This research aims to study the influence of brand strategies in Thai herbal cosmetics market within the Bangkok metropolitan area. Through reviewing literatures, herbal cosmetics image is influenced by 2 main factors, intangible and tangible factors. Intangible factors are as: psychological effects, company relationship, product origin, culture, product personality and product identity. Tangible factors are users' benefits, product commitment which derived from marketing strategies.

Keywords— herbal cosmetics, brand strategies, intangible factors, tangible factors

I. Introduction

The Economic and Business Forecasting Center University of Thai Chamber of Commerce indicated that cosmetics and skin care business will be the third most successful business in the year 2019. Cosmetics market values will be 1.68 billion baht with 7.2 percent growth rate by year 2019-2023. Beauty market will not only be part of body care and wellness but also as human holistic care. Popularity cosmetics trend will be the organic with herbal ingredients, innovating with technology involved, accommodate to all skin types, capable of protect to pollution with scents of fragrance [1]. Even though consumer sticks with high technology nowadays but still tend to favor their loyalty to natural ingredients product.

Thai cosmetics market tends to rely more on natural ingredients due to the belief that chemical substance may be toxic and harmful to skins for long run. Popular beliefs that current human sickness leans toward non-communicative diseases caused by daily life behavior so WHO has encouraged countries turning to use their traditional medicine [2]. The beliefs that not only one medical treatment can cure all kinds of sickness remind consumer turn their lives towards nature. Traditional medicine is primary from local wisdom, natural with herbal ingredients even costs less, suited to non-communicative disease and also with less sight effect. China is the world number one herbal product exported 14.2 percent to the world market while India and Germany are the second and third ranking. Germany is country most developing and using herbal medicine in the world with highest standard. Moreover Germany is also country most exported chemical medicine to the world [3].

Thailand is rich of herbal plants with 1,800 local herbal species but only 300 herbs are circulated selling in the market with demand. Under National Master Plan on Thai herbal Development of Year 2017-2021 stated the weaknesses of Thai herbal product are lack of innovation, low product standard, low profile of product image, branding and packaging [4]. So this paper aims for finding factors influencing to herbal cosmetics perception in term of herbal cosmetics image for promoting which will lead to product development in term of tangible and intangible factors.

A. Background history

Herbal has long history along with Thai society from past to present such as savory/dessert food, medicine, elixir and beauty that local wisdom has been inherited, developed and created its values till today. Herbal product becomes one of Thai major exported because of its availability and rich in various kinds of herbs and low in production cost. Herbal product can be both domestic and international accepted with value added to the product if the product is developed effectively.

Thailand aimed to be leader in country high quality raw materials exported and herbal product including food, supplementary food, cosmetics, herbal extract, medical but most herbal producer are SMEs who loyalty is primarily to preserve traditional practices but low in education and even low to access of funding. Generally SMEs herbal producer has no competitive edge, non-systematic management with lower raw materials standard, the SMEs producer whose skill that
meet quality standard is very low, estimated only 4.4 percent [5]. In contrast, demand for herbal product is increasing rapidly for various industries; for instance in health promoting, agro-processing, pharmaceutical, herbal extract, cosmetics and spa.

Herbal products are primarily from traditional medicine which can classify into traditional medicine, pharmaceutical, midwifery, and massage. But under science of eastern medicine reason, Bureau of Sanatorium and Art of Healing classified traditional medicine into 3 categories; Thai tradition medicine, applied Thai Traditional medicine and Chinese medicine [6].

Herbal cosmetics were rooted in Thai traditional medicine which was derived from civilized Buddhist philosophy more than 2,000 years ago [7] transformed from superstition-Hindu religion into a more empirical medicine by physician Jivaka Komārabhacca who was honored as a master physician for traditional medicine. Sciences principle is the balancing of earth, water, wind and fire that combine pure nature and intertwine with religions influence like Buddhist and Brahmin, together with indigenous medicine that performs Thai traditional medicine. Eastern medicine was wide spread into many Asian countries, merged and applied with local herbs in each local geographic area then makes traditional medicine varies according by regions.

Most herbal producers are from SMEs whose recipe was specific inherited by generations can be separated into nutraceuticals and cosmeceuticals [8]. Herbal market expansion was high in developing countries mostly in Asia Pacific with 9.1 percent growth compare with developed countries where regulation is stricter. Nowadays world herbal market worth 918 billion US dollars with 3-12 percent growth, Thailand cosmetics exported is ranking 1st among Asian countries to the world market and ranking 2nd for country cosmetics exported among Asia countries that behind only for Japan.

B. Herbal Market

The popularity of herbal cosmetics has initiated since the government promotion policy of local project under one village (Tambol) one product (OTOP). This start since the year 2001, nowadays there are more than 387,278 herbal cosmetics items registered under Ministry of Public Health with more than 20-30 percent annual growth [9]. Herbal cosmetics is natural base if classified by elements can be defined in 2 types; traditional herbal cosmetics and cosmeceuticals whose product is the mixed between herbal and medicine or is known as quasi-drug [10].

The needs of herbal product such as herbal cosmetics, herbal medicine is increasing because of the growing number of chronic non-communicable diseases affected by various factors; due to changes in culture, environment, economics, and life style. Moreover Thai citizen is reaching aging society that lead to financial instability and health problem so it reflects to higher needs of herbal product with the rising of medical expenses of government spending which has continuous increasing each year.

Herbal usage in developed countries will remain weak with stricter regulations, in contrast to the developing country where herbal product continues to enjoy high growth due to product recognition, advertising, product development or packaging. In Thailand, herbal market growth is going the opposite way. Herbal product include herbal cosmetics have little support values for industry production, herbal exported market items were small as compared with other Asian countries. Moreover most herbal exported items are in raw materials which incurred low economic values and profit margin. Annually herbal cosmetics exported was about 100 billion baht but with 90 percent raw materials imported. While market trend of natural product is gaining more popularity, herbal product market share should be larger accordingly, but in this case went opposite way, with shrinking profit margin.

Overall cosmetics sales has continually growth with approximate 2.51 billion baht while domestic market worth 1.68 billion baht with 7.8 percent growth. Exported market worth 0.83 million baht mainly sold to Asian countries, e.g. Japan and China [11]. Skin care product gains most market share with 47 percent, hair care 18 percent, make-up 14 percent, hygiene product 16 percent and fragrance 5 percent [12]. Skin care market composed of facial skin care 84 percent and body skin care 16 percent [13].

Thailand has significant exporting number with hair cosmetic exported ranking 1st of the world, body care cosmetic exported ranking 12th and cosmetic producing 17th of the world. Herbal cosmetics producers in Thailand are varied such as from herbal hospital specialist or from general hospital, researcher unit of university, herbal cosmetics companies, OEM and SMEs, as community enterprise. But for competitive awareness of country cosmetics exported,
Thailand should be leader in herbal cosmetics exported as well.

By culture and because of strong conscious appearance life style, marketer predicted future Thai cosmetics market will be varied into 5 segments, those are: 1. children cosmetics 2. men cosmetics 3. elderly cosmetics 4. tourist cosmetics and 5. Muslim cosmetics [14]. For reasons of natural preservation, life style change and diversified market so it is given opportunity to SMEs herbal cosmetics to enter the market.

C. Social Media

The growth in cosmetics market is driven by many factors such as organization culture, society and social media. Facebook is one of social media which motivate frequency of social posts, keep records of viewer’s and number of likes and shares. In order to arouse viewer attention, attractive personality and good looking images are main factors for users; perfect skin with neat makeup is importance for internet idol. Moreover charming personality can open for job opportunities or even dating viewing from social media files. Customer’s journey of Thais involves a lot with social media during their daily lives since country was the 8th world top countries internet using, while Bangkok has reported number one top cities Facebook using most of the world [15].

Average of Bangkok internet users spends as much of 9.38 hours per day searching sharing data with 4.56 hours done thru smart mobile device. Ages of users most are between 18-34 years old followed by 35-44 years old. Content being engagement most is video viewing followed by post link. Mobile account holding in Thailand is 93.61 million higher than its population 69.11 million within this amount internet using account is 57 million with 51 million accounts regularly spend times on social media routinely [16].

D. Herbal Identity

Herbal, under Royal Academy Dictionary year 1982, means plant generated for the drug in order to promoting or cure for health. But Royal Academy Dictionary year 1967 used to display herbal meaning as part of the plant, animal or mineral. Herbal cosmetics normally are priced low but with high product performance. The stronger traditional herbal passion is the more following ancient production pathway it become, so the aborigine herbal cosmetics may lacked of product innovative, quality standard, image and packaging designed when it come from a faithful ancient village SMEs.

Actually “Cosmetic” is derived from “Kosmein”, a Greek terminology, means facial or parts of human body decoration using any elements for beauty in order for attraction.

“Cosmetics” by means of Standard Cosmetics Board is product enhance on facial surface or parts of human body by rub, color, spray, spring which intend for cleaning, protect, decorate for beauty, appearance change as the use of.

“Cosmetics” under Cosmetics Legal means 1. Substance use for apply, rub, massage, spring, spray, put on body intend for cleaning, beauty or promoting skin 2. Substance intend for cosmetics mixing 3. Substance by itself is under ministry legal permission as cosmetics. Thai herbal cosmetics base are kaffir lime, tamarind, aloe vera, lemon, coconut oil, ginger, puree, rice, mangosteen and others etc.,

Herbal cosmetics must be without artificial colors, non-additive, without synthetic herbal, non-irradiated, no contaminated raw materials, non-experiment on animals [17]. Thai herbal cosmetics are distinguished by product code into 3 kinds of cosmetics code; those codes are 1. hair care 2. facial 3. body care [18].

Cosmetics can be grouped into 4 types: 1. facial cosmetics, those are cleaning cream, lotion, skin conditioning cream, skin refreshment, emollient cream, nourishing cream, hormone cream, acne cream, bleaching cream, beauty masks, foundation, face powder eye make-up, blush on, lipstick, mascara 2. hair cosmetics, those are shampoo, conditioner, antidendruff cream, anti-hair fallen cream, hair setting, coloring hair color, and curling cream 3. body care cosmetics, those are hand or body cream, lotion, sunblock, nail lacquers and remover, breast cream, antiperspirants, deodorants and dust powder 4. fragrances, those are alcoholic fragrance solution and emulsified, solid fragrances. Moreover cosmetics, by utilities, can be distinguished into 3 categories: 1. cleansing liquid facial cleansing, nail polish remover, and coloring for beauty 2. nourishing cream such as lotion, hormone cream, acne cream 3. make-up such as powder, eyeliners and lipstick.

E. Distribution

Cosmetics market by distributed is divided into 3 groups, upper-class, middle-class and mass market; upper-class cosmetics were distributed
thru leading department store targeted to A or B+ customer [19]. Product was priced high, most were imported from western countries or Japan while middle-class cosmetics were priced lower, and many were imported from eastern and western countries. Mass markets cosmetics are priced the lowest while herbal cosmetics were claimed as a part of drug for women beauty selling for affordable price. Upper-class cosmetics distributed in prestige store can gain good image together with good looking presenter, celebrity, fashion model plus beauty advisor demonstrates the makeup at sales counter. But recently when internet merge as an alternative channel distribution, mass brand or SMEs brand are suited to for easily launch product to the market. Moreover client always search for cosmetics reviews data thru social medias before attending the store, movie star reviews thru all websites now can be seen fake to them and may cause less attention. More clients like to hear from friends responses, their reviews seem sincere that make more belief. Micro influence is more effectiveness inspiring in today’s consumer buying or even for beauty advice as advertising to them.

F. Pricing

Mass brand are as Mistene, Garnier, Pond’s, Nivea, and Olay while upper brand are Loreal, Artistry, Smooth E, Oriental Princess. Normally mass cosmetics brand is priced as 176 baht per 100 ml while upper brand is priced as 536 baht per 100 ml [20]. Herbal cosmetics normally price its product low as one third compare with general cosmetics but recently when large cosmetics producer launch natural product they price herbal cosmetics even higher than general cosmetics.

High standard for local herbal cosmetics was well-known as Aphai Phubet, all herbal was under pharmacy with Thai traditional style. The hospital area located on 65 rai, in Prachinburi, production line is in Choa Praya Aphai Phubet hospital since year 1999 which carry more than thousand product items selling thru online, branch, department store and many retail shops. Their prices are close to general cosmetics but for the brand image that might be superb quality compare with chemical product.

G. Market Value

In year 2017, Thai cosmetics market selling was 57 billion baht under 4 segments; facial care, hair care, makeup and body care. Facial care gains most market share as of 40 percent while hair care is 33 percent follow by makeup which is 16 percent and body care is 11 percent. The growth of each segment is distributed in table below in figure table 1. The highest growth rate is makeup due to fashion and obsolete replacement.

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<tr>
<th>VALUE*</th>
<th>SHARE</th>
<th>GROWTH</th>
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<tr>
<td>FACIAL CARE</td>
<td>22,800</td>
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<td>HAIR CARE</td>
<td>18,810</td>
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<td>MAKE-UP</td>
<td>9,120</td>
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<td>BODY CARE</td>
<td>6,270</td>
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<td>TOTAL</td>
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*Values are in million baht

Make-up volume sold is higher in urban area with 74 percent higher than rural area, with its sales growth by 4 percent. Cosmetics market compos of 4 consumer groups, those are generation z, millennial, generation x and baby boomer which millennial group is the most buyer by number.

Recently Thai herbal product become one of traditional souvenir and being accepted among foreigners, beside Thai massage, plenty of modern herbal shops are located in tourist area include airport and modern area such as department store, supermarket including community area. Tam Rub Thai is one of traditional herbal retails, the shop carry Aphai Pubet product so as KhaoLaor Pharmacy, Twin Lotus, Zeada, Auay Aun Osod, Pruksa and etc., Tam Rub Thai has more than 69 retail shops all over Thailand.

Not only retails shop or hospitals who sell herbal cosmetics but also the Thai traditional teaching institute also selling herbal cosmetics for example Wat Pho, the most famous for Thai massage also provides items of cosmetics and fragrances. Other institutions are such as Ministry of Health, Pennapa Thaimed Academy, Siriraj Applied Thai Traditional Medicine, Natedao Thai Traditional Medicine, Moe Kheaw and SMEs also selling cosmetics herbal product. Some herbal cosmetics brand owner is also acting as OEM to local SMEs producer.

H. Consumer Behavior

Cosmetics are selling to working women in urban area up to 74 percent; most buyers are emotional buying behavior and want to gain more of self-confidence. Customer normally follows seller technique of make-up which country like Korea
use in promoting its product by increase step of makeup for women. Korea can penetrate 85 percent consumer market share compare with Thai 48 percent.

The increase frequency of use is another technique to increase in selling volume for example of increase makeup remover, mask which is added more step of make-up. Please see table below for step of Thais make-up in table 2.

**TABLE II**

Thai beauty make-up step increased since year 2013-2017 [20]

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<tr>
<th>YEAR</th>
<th>MAKE-UP STEPS</th>
<th>MASK GROWTH (PERCENT)</th>
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<td>2013</td>
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<td>2017</td>
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From table 2 by year 2017, beauty make-up step increased to 2.52 results to mask selling increased by 10.2 percent, together with make-up remover can lead to the overall cosmetics market volume increase by 12-14 percent. Beauty make-up step indicates cosmetics market stage and how consumer using variety beauty product in that market. South Korea and Japan gain most beauty make-up step which is in 6-7 steps while Vietnam, Philippine and Malaysia are in step 2. Indonisia and Thailand are similar in step 2.52 when Taiwan and China are in step 3. Country with most beauty makeup steps provides cosmetics with natural appearance look, more assortments, serving for special occasion as cosmetics for dating, going for party, sporting or travelling.

For reasons, in order to sustain growth of herbal cosmetics compete in the market; product is needed for image measurement being suited to proper strategies.

**II. Theories**

The research aims for study herbal cosmetics in brand equity which emphasized on perception of brand identity, brand image and reputation. Herbal cosmetics selected only items meet requirement of product standard, registered or certified officially. Indicators of this research using herbal cosmetics are as generic brand whose most consumers aware of herbal cosmetic are like.

Brand is as symbol, sign, mark or the aggregate that can distinguish product from another [21]. Besides meaning above, brand can be as name, symbol, logo, trade mark, packaging design in order for separate product from competitors. Brand can communicate for product originate and protect consumer and producer from rivals who enter the market [22]. The effects of brand can be total of impression, product positioning, physical and emotion recognition of benefits [23].

For reasons by the link of brand to product strength incurred many functions of brand as would be listed in table 3.

**TABLE III**

Relationship in brand and its components

| Symbol | Packing/attribute | Imagery/users | Origin/culture | Organization | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 |
|--------|-------------------|---------------|---------------|--------------|---|---|---|---|---|----|----|----|----|----|----|
| AMA    |                   |               |               |              |   |   |   |   |   |    |    |    |    |    |
| AAKER  | ⚫                 | ⚫             | ⚫             | ⚫             | ⚫ |   |   |   |   |    |    |    |    |    |
| KHAPP  | ⚫                 |               | ⚫             | ⚫             |   |   |   |   |   |    |    |    |    |    |
| KOTLER [24] | ⚫               |               | ⚫             |               |   |   |   |   |   |    |    |    |    |    |
| KELLER [25] | ⚫              |               | ⚫             |               |   |   |   |   |   |    |    |    |    |    |
| HENLEY CENTER [26] | ⚫       |               | ⚫             |               |   |   |   |   |   |    |    |    |    |    |
| CRAINER [27] | ⚫           |               | ⚫             |               |   |   |   |   |   |    |    |    |    |    |
| KOTLER & KELLER [28] | ⚫        |               | ⚫             |               |   |   |   |   |   |    |    |    |    |    |
| SCORE  | 6 2 5 4 3 6 2 4 6 1 2 3 1 3 2 |
| RANKING | 1 5 2 3 4 1 5 3 1 6 5 4 6 4 5 |

Concluded from table 3, marketers’ defined brand as a symbol or product personality that has identity this may be from users’ imagination or from company origin or culture related to the product and incur relationship or profit to users most. Fig. 1 shows relative by grouping the similar meanings.

In order to be superior and gain more in market share, consumer must view product value exceeded over others; product could be valued in term of money or as brand equity. Brand equity, the financial perspective, is the image of brand, consumer responsiveness, and display in distribution that can worth the brand while compare with selling the product without brand [29]. To summarize meanings and sorting for variables, all relevant to brand equity variables and image were displayed in table 4.

![Brand and factors relevant](image)

**TABLE IV**

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Brand equity and brand image is the imagination and awareness from cognitive, affective and conative of consumer to product marketing strategies, 4P’s, combined with the fact of consumer’s experiences, demonstrate relationship as picture in figure 2.

Fig. 2 Variables causing brand equity and image

To improve herbal market in term of brand equity and brand image; herbal cosmetics producer should emphasize on relevant herbal cosmetics variables which details are shown in fig. 3.

III. Methodology

After reviews for concepts idea of brand, there are various variables that relate to brand, the abstracts which is imaginary, and facts which are 4P’s linked with black-box, psychological factors. The relationship of herbal cosmetics brand image measurement can be viewed as fig. 3.

Fig. 3 Concept idea for market of Thai herbal cosmetics for brand strategies

Brand is as psychological affected which derived from marketing strategies, profit received from product, producer liaison, product origin, organization culture, product personality and identity. Brand equity can come from tangible and intangible factors. Tangible factors are such as 4 P’s, profit received from product after using and intangible factors are such as imagination, culture, company relationship, product personality and product identity which will be analyzed results further on.

IV. Conclusion

Market of Thai herbal cosmetics in term of product image can be developed due to 2 main factors; intangible factors and tangible factors. Intangible factors are as: psychological effects in term of cognitive, affective, conation and company relationship, product of origin, culture, product personality and product identity. Tangible factors are as users’ benefits, product commitment which derived from 4 P’s.

Building for intangible factors for SMEs herbal cosmetics for herbal image is really important because the cognitive of buyer still remember old fashion style of producer which needs to get change. The effectiveness of local SMEs herbal producer is cheap price which incur less profit and hardly for them to get business growth. The needs of product imagination are essential for cosmetics and other psychological factors such as motivation, perception and learning.

Tangible factors are profit that consumer would get from product such as herbal cosmetics attributed which need for standard and marketing strategies to be learn on Omni-channel. Herbal cosmetics need to studies, details of its perception, herbal image, awareness and recognition along with consumer benefits.

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