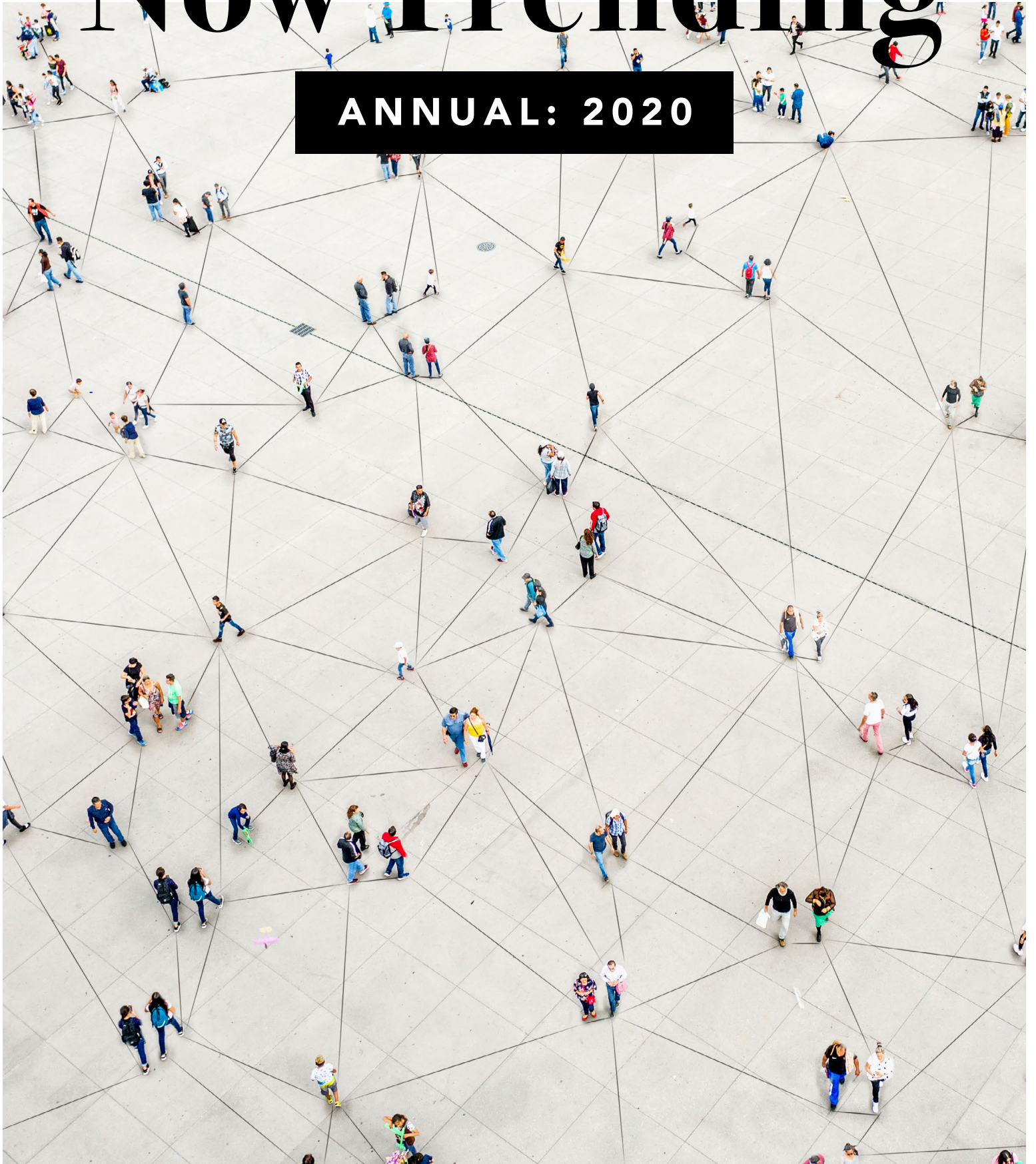


Now Trending

ANNUAL: 2020





Rory



Wild One x Sweetgreen

Now Trending: 2020

The end of the year is always a time for reflection. Revisiting major events helps us learn from the past and adapt for the future. But if 2020 left your head spinning, you weren't alone.

Early in the year, climate change became an urgent conversation as wild fires devastated numerous parts of the globe. For many, the state of the environment has sparked a major call to action. In true Gen Z fashion, 17-year-old activist Greta Thunberg lead the charge, and bore the brunt of the public eye. The United Kingdom officially departed the EU, to mixed sentiments. Meanwhile the US government dealt with a growing partisan divide. The US lost NBA legend Kobe Bryant in a tragic accident and iconic Supreme Court Justice Ruth Bader Ginsberg while continuing to fight racism and inequality. And all of this, under the umbrella of an unprecedented global pandemic.

Enter COVID-19. Few things have been able to slow the bustle of modern society like the coronavirus. This year life as we knew it came to a halt, as the world was forced to address a global health crisis we didn't fully understand. Daily routines were re-defined, and "essentials" were re-prioritized. For the first time in a long time, we slowed down and took stock. Commerce scrambled to address immediate shifts in consumer behaviors in order to stay afloat. And many of these effects are predicted to linger long-term.

In Now Trending: 2020, we will revisit the major trends TricorBraun tracked throughout the year as they relate to consumer behaviors. We will explain their drivers, and most importantly, the resulting implications on consumer packaged goods (CPG). Through this exploration, we will pose thought starters on what's to come, through the lens of "You" in all the landscapes that have been affected by the transition.



01. You at Home

Together mental and physical health drive the new wellness narratives, as “treat yourself” evolves to “take care of yourself”.

02. You in Public

Stay-at-home restrictions have left many desperately needing a change of scenery, and some things just can't be shipped.



03. You in the Community

Slowly but surely, mindsets have shifted from an individualist to community-oriented approach.

PLUS...

04. A Look Ahead

05. Packaging Solutions



96% of consumers intend to continue some, if not all, cleaning habits adopted during the pandemic into the future.

American Cleaning Institute



Ben & Jerry's®



You at Home

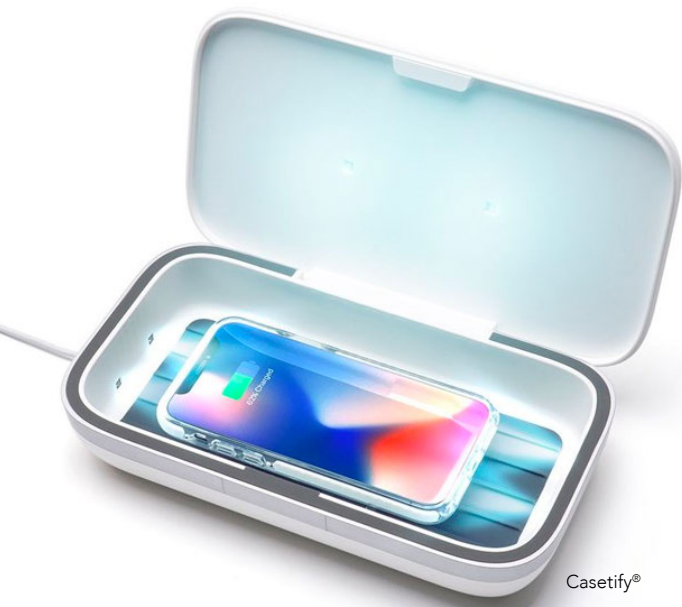
2020 has been a year of “everything, all at once” and the fear of the unknown has created a greater need for comfort and stability. Amidst the uncertainty, consumers are turning inward.

Together mental and physical health drive the new wellness narratives, as “treat yourself” evolves to “take care of yourself”. Stay-at-home restrictions have transformed personal and family sanctuaries to hyper-disinfected spaces for work, school, and play. Shopping is done online, whenever possible, and delivered directly to the consumer. The new multi-functional home environment will require healthy boundaries in order to maintain balance.

Successful brands provide products and packaging that streamline the cleaning process, promote healthy habits, and create simple personal indulgences.

Consumer Priorities

- Disinfecting of hands, clothing, surfaces, and groceries remains a top concern as consumers prioritize their health and safety
- Evolving food habits. Those pressed for time prioritize quick meals, frozen staples and ingredients with extended shelf life. Budding home chefs take advantage of having more time in the kitchen by exploring new flavors and cooking styles.
- Seeking comfort via everyday indulgences and self care rituals
- The ability to do everything from home
- Reliable ecommerce and quick, contactless delivery
- Transparency and value for the money



Casetify®



Magnolia Bakery®



COAT Paints

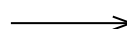
Lifestyle Shifts

- High anxiety due to current events and isolation
- Everything and everyone at home (work, school, telehealth, online and in-app grocery shopping)
- Embracing a new kind of connectedness via Zoom happy hours and drive-by birthday parades
- Increased focus on the home (DIY improvements; rise in popularity of gardening, especially vegetables)
- A return to cocooning, naturalness and nostalgia
- Curbing boredom via digital (binge-watching, TikTok, online gaming) and analog (puzzles, coloring books, baking) "quarantainment"
- Rise in pet adoption stemming from increased time at home

Trending Products

- Hand soap and surface **disinfectants**
- **Customizable supplements** supporting physical and mental health, including CBD-infused food & drink
- At-home facials, hair dyes and beauty treatments **promoting indulgence and self care**
- **Indulgent** pet products
- Smart home goods promoting an **optimized, multi-functional home** environment
- **Recipe kits** from favorite restaurants allow consumers to take the experience home
- **Direct-to-consumer (DTC) kits** for home improvement, food & beverage, pet care, health & wellness and alcoholic beverages

What does this mean for packaging?



Packaging Implications



Hush & Hush™



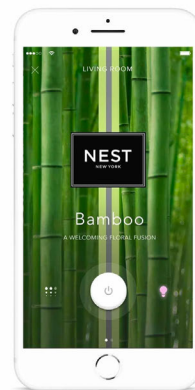
Prose



Happy Dance



Saturday Skin



Pura®



Routine



Universal Yums allows subscribers to sample snacks from all over the globe during a time when few are traveling abroad



Max Bone



Dawn®



Ever Spring™

Tub O' Towels®

TREAT YOURSELF MEETS TAKE CARE OF YOURSELF

Convenient dosing and dispensing

Precise, hygienic application via droppers and skincare spatulas

Flexible, single-use sachets

Simple graphics and use of color make these packages ideal for sharing on social media

DTC subscription kits for personal care, health supplements, food & beverage and spirits



Starbucks®

STREAMLINED CLEANING & DISINFECTING

Targeted application

Refillable concentrates

Durable canisters for wipes

Foamers and sprayers for low-viscosity formulas

Clean dispensing

Secure sealing

Ease of open/close

Bulk sizes to increase value and reduce shopping trips or delivery of heavier items

THE FULL HOUSE

Single serve and ready to consume

Pre-portioned

Large format, refilling system

Consider this...

With more consumers choosing to have their packaged goods delivered, all packaging must be durable enough to withstand the multiple touchpoints of the ecommerce journey.



Mutti®



DEUX



Pumpkin Tree™



Shaker & Spoon Cocktail Club



Domino Park; Noam Galai/Getty



60% of consumers seek food and beverages that support their immune health.

Innova Market Insights

You in Public

Ecommerce has increased significantly but consumers are not able to avoid in-person shopping entirely – nor do they want to. Stay-at-home restrictions have left many desperately needing a change of scenery, and some things just can't be shipped. Trips to the store now carry the added weight of mingling with the coronavirus in public spaces. Purchasing volumes are getting larger, and less frequent. Masks are an essential part of leaving the home, as is social distancing. Portable sanitizers are a must, and where possible, we are leaning on technology to create contactless exchanges. But technology only goes so far when it comes to true social interaction. Outdoor spaces provide natural ventilation and more room to distance, encouraging the resurgence of picnicking, yard games, and neighborhood strolls. **Products and packages that help consumers stay safe while on-the-go will help them complete their routines with confidence.**

Consumer Priorities

- Quick, seamless, contactless commerce (curbside pickup, cashless transactions)
- Maintaining health and hygiene while shopping in public
- Assurance of product safety
- Bulk shopping to reduce trips
- Socially distanced retail spaces
- Shopping experience equal to or better than the "old normal"



Amazon® Dash Cart



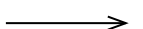
Lifestyle Shifts

- An increased focus on immunity and general well-being has consumers seeking seamless wellness solutions that easily fit into their daily routines
- Social distancing and wearing face masks and gloves continue to be a standard precaution
- Spending more time outdoors, including patio dining at restaurants, socially distanced gatherings, parking lot picnics, outdoor exercise, concerts, drive-in movies and other leisure activities

Trending Products

- **Touch-less** (automatic) dispensers
- **Portable disinfectants** (surface wipes, hand sanitizer)
- **Disinfecting** pet care after walks
- Deep clean **fabric detergents**
- **Moisturizing hand care** to combat dryness from frequent hand washing and sanitizing
- **Immunity-boosting supplements** as well as superfoods and beverages with functional benefits
- **Canned spirit cocktails and wine** for outdoor gatherings where glass may not be allowed
- While color cosmetic sales have dropped, interest in skin care and **clean beauty** is up (both due in part to mask wearing)

What does this mean for packaging?



Packaging Implications



Vizzy™



Cerebelly®



Mangiacotti™



Monat®



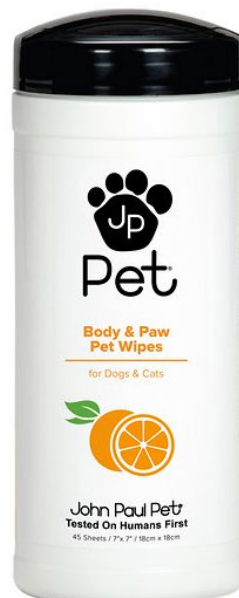
Humanrace is an inclusive, gender-less skincare line featuring DTC and refillable formats



Siips



Celltrient™



John Paul Pet®





Tide®



Microban®



B1U™



SkinCeuticals®



Persil®



Olika®



Clean Well™



TricorBraun Solution
HiVis Refill and Dispensing System

STOCKING UP

DTC curated subscription kits for personal care, health supplements, food & beverage and spirits encourage trial

Bulk format refill and dispensing systems for portable sanitizer bottles

“Portionability” of contents (containing smaller individual packs)

ON-THE-GO

Portable

Ergonomic and grippable

Disinfectable surface

Convenient dosing

Precise, hygienic application via droppers, sprays and spatulas (for skincare)

Built-in applicators

Flexible, single-use sachets

Secure sealing

Resealable

Designed to fit in a car cup holder

Biodegradable

Ease of opening/closing

Lightweight

Ready-to-use

Consider this...

Fortifying our immune systems with functional beverages is a seamless way to incorporate wellness goals into our daily routines, and it's something that is expected to stick around long term. The best products will reassure consumers with securely sealed packages that clearly communicate the health benefits.



Blueland



Girlfriend Collective

You in the Community

In the first half of 2020, consumers rushed to find trusted staples as supply chains scrambled to keep up. Less frequent trips and reduced foot traffic left small businesses struggling, and when public spaces re-opened, consumers found many neighborhood retailers hanging on by a thread. Small businesses offered the product authenticity consumers sought, and after learning to live without their favorite brands, they were more willing to try something new. Slowly but surely, mindsets shifted from an individualist to community-oriented approach and consumers used their dollars to support the brands and businesses that aligned with their values.

During the height of the pandemic, health concerns altered the way consumers looked at reusable goods. Until we were confident we could effectively disinfect, single-use plastic was seen as a safer option. Nevertheless, big picture principles for the eco-friendly movement proved resilient.

Major CPG corporations pressed forward with ambitious sustainability goals, brands voiced their values, and above all, consumers began holding them both accountable.

Consumer Priorities

- Inclusivity and everyday activism via social media
- Purpose-driven brands that align with their values
- Locally sourced products
- Decreasing one's carbon footprint via products and packaging made from recycled and renewable materials
- Assurance of product safety and efficacy
- Transparency regarding ingredient provenance
- Discovery and trial of smaller, up and coming brands
- Value for the money



Public Goods

81% of consumers intend to purchase from a DTC brand by 2023.

Retail Dive



RUSSEB™



Imperfect Foods



LastSwab

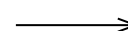
Lifestyle Shifts

- Social media “clicktivism” via trending hashtags and online grassroots campaigns in support of political or social causes
- A strong focus on today’s issues, including racial and gender inequity, climate change, the economy and political division
- Swift online backlash in response to anything deemed distasteful, controversial or politically incorrect
- Clean eating and waste-free living
- Shopping local and supporting small businesses
- A preference for DTC brands, which are thought to bring better products to consumers at a lower price point

Trending Products

- Traditionally single-use items **redesigned for reusability** (ex. personal hygiene, food storage bags, straws)
- **Plant-based** everything
- Clothing that gives discarded plastic a second life
- **Ultra concentrated**, waterless formulas you mix yourself prior to use
- **Refillable** vessels; full life cycle products and packaging
- Pared down, gender-free cosmetics and personal care

What does this mean for packaging?



Packaging Implications



United Sodas of America



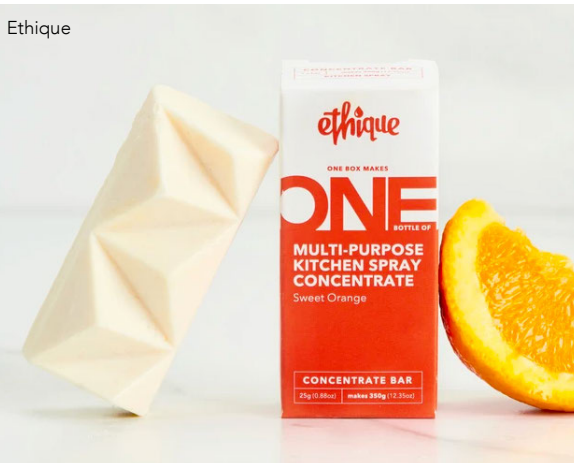
Truman's



Grove Collaborative delivers eco-friendly home, personal, baby and pet products directly to consumers' doors via flexible monthly shipments.



Whirlpool® Swash



Ethique



Four Sigmatic®



Lyle's Golden Syrup®

Nécessaire





P&G®



SEEN™



Clean Republic



Bacardi®



DESIGN CUES

- Modern, minimalist graphics
- Muted color palettes and nature-inspired imagery
- Gender-neutral branding
- On-pack ingredient benefit call-outs
- Limited edition branding to promote a brand's donation campaigns

MATERIAL SELECTION

- Plastic alternatives
- Post-consumer and plant-based resins
- Stainless steel and aluminum
- Glass bottles and jars
- Flexibles with fitment closures
- No secondary packaging

FORMATS & NEW MODELS

- Lightweight
- Right-sized
- Refillable (designed with refill cartridges and concentrates in mind)
- Single stream assemblies
- Ecommerce-friendly closures
- "Keep the closure, return the bottle" systems

Consider this...

Value for the money remains a top concern for the foreseeable future, and brands that successfully balance cost-effectiveness with sustainability win.

Eco-friendly household cleaner concentrates continue to gain popularity. While most concentrates include a heavier refill container with the initial purchase, this package is a one-time purchase intended to be reused and refilled via a DTC subscription.

A LOOK AHEAD

2021 & Beyond: Consumer Priorities



Moonlit Skincare®

COMFORT & PROTECT

Key Packaging Features:

Child-resistant, accessible, senior-friendly, sensory effects, nostalgic and optimistic branding

Thought Starters:

How can packaging provide reassurance (i.e. cleaning efficacy, immunity support)?

How can packaging demonstrate authenticity and promote trust in a brand?



Wildscape™

RESPONSIBILITY

Key Packaging Features:

Improved resins (PCR, biodegradable, compostable), reusable or refillable, hygienic, brand values reflected in label graphics and messaging

Thought Starters:

Consumers desire to balance cleanliness and safety with eco-friendly solutions. How will sustainability evolve to meet this need?



Brandless™

VALUE-DRIVEN

Key Packaging Features:

Tamper-evident, leak-proof, secure seal, 2-in-1 formulas, bulk sizes, private label, refillables, curated and purposeful (quality vs. quantity), shift to DTC

Thought Starters:

How will brands reconcile consumers' desire for personalization with value-driven products?



Counter Culture™

HEALTH & HYGIENE

Key Packaging Features:

Tamper-evident, secure seal and re-seal, intuitive or targeted dispensing, clear messaging on labels, single-use sachets, unit dose, disinfectable

Thought Starters:

How will packaging materials innovate to intuitively communicate safety to consumers?



Califa Farms®

SOCIAL CONNECTION

Key Packaging Features:

Use of plastic alternatives, lightweight, right-sized, gender-neutral branding, on-pack social responsibility claims, ecommerce-friendly features

Thought Starters:

Consumer interactions with brands are becoming increasingly digital. How can brands use packaging to foster a personal connection with their consumers and drive profitability?



Sakara Life™

BIG WELLNESS

Key Packaging Features:

Disinfectable packaging, cross-category design cues, plant-based materials, safety, touch-less (automatic) dispensing

Thought Starters:

While traditional supplement formats remain popular, brands are expanding into ready-to-consume categories such as indulgent mini-bites, beverages and snacks

Packaging Solutions

As we move deeper into 2021, consumer priorities will continue to evolve. The cultural mindset is expected to focus on health, hygiene, and collective solutions for the greater good. Consumers will seek ethical brands that promote transparency, align with personal values, and provide a sense of security. Boutique brands will disrupt category norms by prioritizing eco-friendly materials, like paperboard or aluminum, over traditional plastics or glass. Sustainability initiatives will press on, but they will be expected to demonstrate efficacy. Above all, ecommerce and DTC models will continue to provide a safer, more convenient, shopping experience for consumers and packaging should be prepared to adapt for this channel. **At TricorBraun, we prioritize an understanding of these behaviors so that we can develop packaging that not only delights consumers but speaks directly to their needs.**

Contact us at marketing@tricorbraun.com to get started on your solution today.



TRICORBRAUN®

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