



TRICORBRAUN®

# HOW COVID-19 ACCELERATED THE HEALTH & WELLNESS MACROTREND

**4 TRENDS EVERY CONSUMER PACKAGED  
GOODS COMPANY SHOULD KNOW**





On March 11, the World Health Organization announced that COVID-19 was now a pandemic. Two days later, the United States declared it a national emergency. Within weeks, many U.S. states were on lockdown. Zoom meetings replaced water cooler conversations and millions of parents were faced with working-from-home while teaching their kids at the same time.

Meanwhile, toilet paper was scarce. Grocery stores were devoid of disinfectants. And people were looking at alcohol percentages and wondering if they could use their vodka to make home sanitizing solutions.

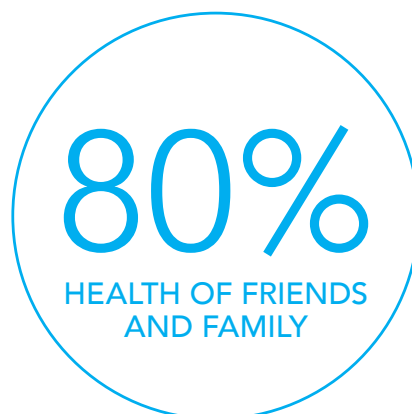
If you asked most consumers about COVID-19 on March 11, they probably had no idea how profoundly their lives were about to change. Yet our lives have changed.

The Health and Wellness sector was already an economic powerhouse pre-COVID-19. The Global Wellness Institute values the sector at \$4.5 trillion, a figure that incorporates everything from nutraceuticals to genetics-based diets and nutrition, and from biohacking to mental health apps.<sup>i</sup> As our behaviors continue to shift in response to the pandemic, we're accelerating an already robust macrotrend as we seek out products to protect our homes, improve our immune systems, and boost our peace of mind.

## COVID-19 HAS CHANGED THE LANDSCAPE

How much have our behaviors changed?

An April 2020 Accenture report<sup>ii</sup> says that consumers are laser-focused on their most basic needs. Personal health, food and medicine, and the health of family and friends have become priorities.



Proportion of consumers that rank needs as a top 3 priority

- Accenture



We're also looking for contactless commerce. Accenture reports that "one in five consumers who ordered their groceries online did so for the first time." Consumer trends watcher WGSN terms this shift part of the "untact economy,"<sup>iii</sup> and points to a survey that shows 71% of consumers in South Korea increased their contactless shopping due to the coronavirus. In the U.S., Walgreen's "now offers select products at its more than 7,300 pharmacy drive-throughs nationwide," including household essentials and cleaning supplies. WGSN also reports that Kohler's intelligent faucets, with their touchless sensors, saw an eightfold increase in sales during just the first two weeks of March.

With these shifts comes a greater focus on health and wellness, including both our physical and mental health. We're proactively seeking opportunities to improve health conditions, boost immunity, and relieve stress and anxiety. Accenture says that "CPG brands should heed this change and make it a priority to support healthy lifestyles for consumers, shoppers and employees. Having a 'health strategy' will be a strategic differentiator in the foreseeable future." WGSN says that "with consumer sentiment shifting from sustainability to health and protection during the coronavirus outbreak, hygiene-focused packaging will increasingly become a higher priority in the future."

This paper examines four health and wellness trends and the implications of changing consumer behaviors on packaging and the consumer packaged goods industry.<sup>iv</sup>

## 1 Hand Hygiene

While infection prevention specialists have long highlighted the importance of clean hands in halting the spread of disease,<sup>v</sup> consumers have finally caught up to the science. We're washing our hands. A lot. According to Accenture, people now wash their hands an average of 12 times a day—a 90% increase in handwashing. The increase in hand hygiene has sent us to brands with moisturizing properties and products to soothe our chapped, cracked, and over-scoured hands.

We're also looking for package formats that are convenient and hygienic for both in-home use and when we are out and about. Traditional formats, including bottles with pumps, flip-tops, tubes, and dispensing closures, all remain solid options for in-home use. We want bulk-weight sanitizer bottles so we don't run out, and we use them to refill travel-sized bottles for on-the-go needs.

TricorBraun Stock Solutions



Automated dispensers are becoming more popular—and the demand for automated solutions is only going to increase as consumer awareness of hand hygiene increases and consumer behavior shifts as a result. From grocery stores to gyms, automated soap and sanitizer dispensers are becoming more essential. As we move from outside into our homes, automated solutions will also help us disinfect quickly before we touch doorknobs and reach for the soap to scrub our hands.

## Think Big. And Small.

We want bulk supplies of hand hygiene and home care products. But, often, we need mini versions too.

Consumers have responded to shortages of cleaning and disinfecting supplies by snapping them up when they become available. As a result, giant bottles of bleach are being decanted and diluted into glass containers and other spray bottles for easy household use. Similarly, consumers are filling mini-bottles with hand sanitizer and putting disinfecting wipes into baggies for portable use.

While we're staying at home a lot, sometimes we need to leave the house—for example, to go to the doctor, the gas station, or the grocery store. And when we can no longer wash our hands after every touchpoint, we still want to be germ free. This need for convenient, on-the-go solutions is only going to accelerate as more states reopen and many of us venture back into restaurants, retail stores, and other public spaces.

## 2 Home Care

It's not just our hands—it's everything that comes into the house. An April study found that two-thirds of Americans are worried about contracting COVID-19 from food and food packaging.<sup>vi</sup> We're setting up quarantine zones for our non-perishable groceries. We're wiping down cans, bottles, and other packaging.

In a report on how home care product claims preferences have shifted, Nielsen identifies several health and safety product claims consumers value—and will pay for. They include protecting one's family against germs and bacteria, keeping one's family safe from diseases, and killing germs and bacteria in an effective way.<sup>vii</sup>







TricorBraun Success Story: Truman's Household Cleaning Products



Ian Bell, an analyst with Euromonitor International, said that consumers have “had a radical and rapid reassessment of home care products.”<sup>viii</sup>

From a packaging perspective, this shift to hyper-disinfection means we are proactively cleaning our homes to maintain home hygiene and looking reactively to disinfect surfaces as we bring ourselves, our groceries, and our mail-order packages in from outside. As part of this trend, we’re increasingly looking for package formats that streamline the cleaning process with intuitive, ergonomic use. Automated dispensers won’t just be important for ourselves but also to make it easy for anyone coming into the home to easily sanitize their hands before they touch anything. Wipes, and easy-wipe dispensers are also becoming must-have items in many homes. So are products with trigger sprayers and other dispensing closures, including bottles for diluting bleach solutions and other cleansers. Aerosols are finding new life as consumers reach for disinfectants to spray on carpets, fabrics, and even our shoes. Laundry detergents are also in high demand as people wear clothes once and wash more frequently to protect against the spread of COVID-19.

Meanwhile, one WGSN study found that 54% of consumers report that cleaning their homes relaxes them, a proactive strategy that creates control amid a pandemic and contributes to mental wellbeing.<sup>ix</sup>

Rethinking package sizing for the home care market is also key. Bulk sizes in both rigid and flexible packaging are becoming more popular as people stay home and stock up when they can find cleansers and disinfectants in stock. This dovetails with another trend that spans the health and wellness category: product efficacy is trumping natural and sustainable. We want what we know works—and a lot of it.

### 3 Nutraceuticals

We want wellness products everywhere: for our hands, our surfaces—and our bodies. The global pandemic has created a huge surge in demand for everything wellness as consumers look to boost immune systems and improve overall physical and mental health. Consumer trends watcher Mintel said in a May 2020 report that “products that offer immunity benefits will surge... Consumers are turning to stress relieving, calming, and comforting products amid COVID-19 fears.”<sup>x</sup>

The surge in nutraceutical sales is here. Beauty industry watcher WWD says that the “1.6 billion multivitamin market, for instance, grew 23 percent in just one week in March... Melatonin, a \$639 million market,



TricorBraun Stock Solution  
63mm Wide-Mouth PET Packer

Consumers are looking for packaging that is both secure and provides for clean and safe delivery.



TricorBraun Success Story: Hello Bello  
Square vitamin bottles with CR closures

grew 38 percent in 1 week.”<sup>xi</sup> Forbes reports that collagen supplement maker Vital Proteins has experienced a 50% increase in demand for its products, led by a COVID-19 shift in how consumers approach their health and wellness. Brett Thomas, who serves on Vital Proteins’ board, told Forbes that “consumer interest in protein is moving beyond one-dimensional goals such as weight management or muscle build.” Instead, we’re looking at how these products can boost our immune health.<sup>xii</sup> More broadly, products from ginger to essential oils to CBD are flying off warehouse shelves.

Because many consumers are staying at home and increasingly health conscious, most of these sales are direct to consumer. As a result, selecting sturdy packaging formats that ensure structural integrity will be critical as e-commerce sales include far more touchpoints as products move from the manufacturer to the consumer’s front door.

Consumers, meanwhile, are looking for packaging that is both secure and provides for clean and safe delivery. This might mean selecting dispensing closures for dosing or child-resistant closures to protect your product from falling into the wrong hands. It also includes scoops to ensure hygienic dosing of powder supplements. Other popular formats in nutraceuticals include small-dosing and convenient sprays and droppers. PET packers with child-resistant or dispensing closures and lightweight tins are optimal choices for unwrapped nutrition bites and CBD gummies. For probiotic and other immune-boosting drinks, expect demand to increase for single-use plastic, glass, and aluminum bottles as consumers prioritize perceived hygiene over sustainability.

## 4 Indulgence

At the end of the day, we’ve scoured our hands, cleaned our homes, and fed our bodies with healthy, immune-boosting nutraceuticals. But with so much renewed focus on our basic needs, we need a break. We’re looking for experiences that we can experience at home. According to Mintel, “with consumers increasingly looking for comfort and reassurance, brands have an opportunity to be a source of comfort.”<sup>xiii</sup> This is manifesting in the form of indulgence at home, from at-home meal and drink kits to clean beauty.



Demand for meal kits has surged since the pandemic began as consumers seek healthy food supplies and take advantage of more time at home. According to VoxMedia's Eater.com, "what was once a perk of the direct-to-consumer lifestyle has become a lifeline for those avoiding grocery stores, and a chance to learn a new recipe or practice an old skill in the kitchen."

While meal kits offer gourmet in-home dining, restaurants and bars are rolling out their own indulgent food and drink experiences. Consumer trends company Ebco reported that with shelter-in-place orders, "restaurants are beginning to enter the pre-packaged category to deliver the experience of a bar/cocktail lounge to living rooms."<sup>xv</sup> Demand for cocktail delivery kits is also soaring.<sup>xvi</sup>

When it comes to packaging, the growth of both ecommerce and local delivery services means that sturdy formats that allow structural integrity are critical to getting fresh ingredients, pre-cooked meals, and curated cocktails direct to the consumer. Popular packaging formats include individually-sized bottles and containers for portion control. Demand is also growing for plastic to prevent breakage, secure seals to prevent leaking, and tamper-evidency to reassure consumers that their food and drink are safe to consume.

Interest in indulgence is also growing in the beauty sector as consumers look to buy little things that make them feel good: a facial mask, scented bath bombs, or a new lipstick or nail color. As we lean into our new stay-at-home routines, we're looking more and more for small ways to perk ourselves up and bring a little luxury into our lives.



TricorBraun Success Story: CURiO Brands  
Thymes Body Care Products





This category includes products with clean, good-for-you ingredients that help consumers look and feel their best. Ulta's chief merchandising officer, Monica Arnaudo, said that "overall wellness and self-care are top of mind for our consumer."<sup>xvii</sup> As a result, the company is looking to grow its clean cosmetics category.

As consumers gravitate to relaxing in-home treatments, it will be important to repurpose the packaging of products traditionally sold in bulk for the new demand in the home market. Examples include packaging face masks in flexible, single-use pouches or small jars with applicators for hygienic use. Private labels with ingredients lists and moisturizing claims will be essential as people look for less-pricey ways to indulge. In addition, it will be important to take a fresh look at graphics and design to ensure your brand story is selling indulgence and clean beauty to consumers.

## STAYING CONNECTED

As we navigate the COVID-19 landscape, it will be more important than ever for health and wellness brands to stay connected—to their workforces, to consumers, and to the tectonic shifts in what we want, need, and do. In its April 2020 report, Accenture said that "CPG companies can adapt to these changes by taking action to respond, reset, and renew to be positioned even stronger for the future."<sup>xviii</sup>

At TricorBraun, we're here to help. Whether you're launching a new product or repurposing an existing line for a new market, our aim is to help you procure the packaging that responds to what consumers want today. We'll help you identify packaging formats and designs that reset, renew, and help your brand stay relevant and connected as consumers rethink their priorities and adjust their buying habits for the long-term.



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- <sup>iii</sup>Coronavirus: Future of Hygiene. WGSN. April 29, 2020.
- <sup>iv</sup>Coronavirus: Future of Hygiene. WGSN. April 29, 2020.
- <sup>v</sup>Association for Professionals in Infection Prevention and Epidemiology. Infection Prevention and You: <https://professionals.site.apic.org/infection-prevention-basics/clean-your-hands-often/>.
- <sup>vi</sup>COVID-19 Raises Consumers' Packaged Food Concerns. Packaging Digest. May 18, 2020. <https://www.packagingdigest.com/food-safety/covid-19-raises-consumers-packaged-food-concerns-2020-05-18>.
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- <sup>ix</sup>Home Care. TricorBraun. June 16, 2020. <https://www.tricorbraun.com/insights/blog/home-care/>.
- <sup>x</sup>How COVID-19 Brought the Future Forward. Mintel. May 1, 2020.
- <sup>xi</sup>Paging Dr. Nature: Vitamin and Supplement Sales Boom Amid Coronavirus. WWD. April 20, 2020. <https://wwd.com/beauty-industry-news/beauty-features/vitamins-supplements-coronavirus1203555798-1203555798/>.
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- <sup>xiii</sup>How COVID-19 Brought the Future Forward. Mintel. May 1, 2020.
- <sup>xiv</sup>Home Cooks Trapped by Coronavirus Are Flocking to Meal Kits. Eater.com. March 31, 2020. <https://www.eater.com/2020/3/31/21199913/home-cooks-pivot-to-meal-kits-blue-apron-hello-fresh-coronavirus-covid-19-impact>.
- <sup>xv</sup>Health and Wellness Packaging Exploration. The EBCO. April 2020.
- <sup>xvi</sup>You can't go to the bar, so home-delivery cocktail kits are bringing in the bar to you. The Washington Post. May 8, 2020. <https://www.washingtonpost.com/news/voraciously/wp/2020/05/08/you-cant-go-to-the-bar-so-home-delivery-cocktail-kits-are-bringing-the-bar-to-you/>.
- <sup>xvii</sup>Ulta and Sephora bet on the original purveyors of the clean beauty movement. June 18, 2020. <https://www.glossy.co/beauty/ulta-and-sephora-bet-on-the-original-purveyors-of-the-clean-beauty-movement>.
- <sup>xviii</sup>How COVID-19 will permanently change consumer behavior. Fast-changing consumer behaviors influence the future of the CPG industry. Accenture. April 2020.



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