



Berlin Packaging: **Market Trends**



Trends in Home Care Products and Packaging

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Demand for Disinfectants

Demand for Disinfectants

E-Commerce Growth

Home as Sanctuary

Cleanliness & Wellbeing

What's Next?



Personal and home hygiene and safety have become paramount during the COVID-19 pandemic. Face masks and hand sanitizers are now everyday apparel and routines. Inside the home, consumers have increased their cleaning and disinfecting regimens to remove both visible and unseen contaminants and protect themselves against the potentially deadly SARS-CoV-2 coronavirus.

Annual sales of home care products in the U.S. leaped 11% to reach \$33.8 billion in 2020, according to market researcher [Euromonitor International](#).

At the onset of the pandemic, the following home care categories experienced huge demand surges and maintained strong sales performances throughout the year:

- disinfectants
- multi-purpose cleaners
- wipes
- bleach

Surface cleaner sales (including wipes and disinfectants) jumped about 28% to \$7.68 billion in 2020; bleach sales rose nearly 15% to \$847 million; dishwashing product sales increased 12% to \$3.47 billion; and air care (including candles) grew 7% to \$5.75 billion, notes Euromonitor.

Demand For Disinfectants

At the start of the pandemic, the U.S. Centers for Disease Control and Prevention (CDC) recommended cleaning and disinfecting frequently touched surfaces.

Consumers hurriedly bought and stockpiled surface cleaning products, especially disinfectants with antibacterial and antivirus claims.

Home care disinfectant sales soared about 81% in 2020 to \$1.50 billion while multi-purpose cleaner sales expanded more than 25% to \$2.35 billion.

One beneficiary of the sales explosion in disinfectants was Microban 24—a line of multi-purpose and bathroom cleaners in spray bottles and sanitizing spray in an aerosol can that kills 99.9% of bacteria on hard surfaces for up to 24 hours after application. Launched by [Procter & Gamble](#) one month before the March lockdowns, the P&G brand was expected to achieve \$200 million in sales in 2020.

Even before the pandemic, multi-purpose surface cleaners had been a revenue star in the home care products category.

Consumers prefer the convenience of using a single multi-purpose product for cleaning a variety of surfaces, such as stovetops, countertops, bathroom sinks, desks, windows and more. Nearly a third of shoppers globally say they would pay more for household cleaning products that offer time-saving benefits, reports market researcher [GlobalData](#).

E-Commerce Growth

Demand for Disinfectants

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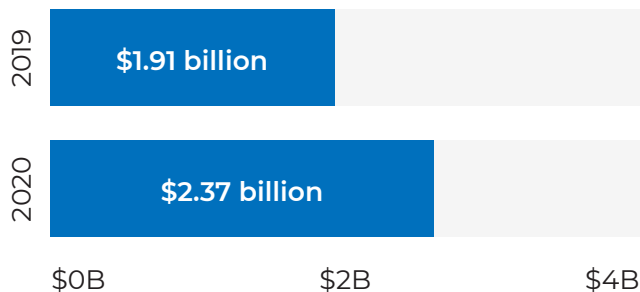
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Because of their ease of use and portability, wipes became a darling of consumers in 2020.



Sales of home care wipes and floor cleaning systems jumped nearly 24% last year to \$2.37 billion, reports Euromonitor. While most home care product categories suffered from supply chain shortages and disruptions related to product ingredients and packaging components, some wipes were especially hit hard because their polyester fabric is also used to make personal protective equipment such as masks and medical gowns.

Several wipes makers faced tradeoffs. Euromonitor notes, for example, that Reckitt Benckiser discontinued less popular wipes brands to manufacture larger quantities of its Lysol wipes.

Similarly, Clorox suspended production of its new compostable cleaning wipes to increase capacity of its disinfecting wipes. Nearly 9 out of 10 (86%) Americans are confident that their cleaning products help protect against coronavirus, according to research from the [American Cleaning Institute](#). Post-pandemic, more than half of consumers plan to continue wiping down surfaces more often and using disinfecting products such as wipes and sprays.

E-Commerce Growth

While still relatively small, [e-commerce](#) became a bigger channel for home care products in 2020, capturing about 5.5% of total sales. For comparison, e-commerce had a 1.9% share in 2015, notes Euromonitor.

With limited shelf space at major brick-and-mortar retailers, **many upstart home care brands use e-commerce as their primary or sole sales channel.** For example, [Veles](#) uses UPS to distribute its all-purpose cleaner. Packed in a 16-oz aluminum bottle with a trigger sprayer, the unique product is derived from food waste (97%) with the remainder being fragrance-related compounds. Consumers can purchase product refills, which come in a 32-oz, amber glass bottle.

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Major home care brands are also investing in e-commerce. Last summer, [Reckitt Benckiser](#) launched its first plant-based cleaning brand—Botanical Origin*—in the U.S. The brand, which includes laundry detergent and fabric softener, is sold exclusively through Amazon.

The detergent contains 67% bio-based ingredients while the softener features 71% bio-based ingredients. Products are packed in translucent amber plastic bottles—54 oz for the detergent and 32.46 oz for the softener. By 2022, the packaging will be 100% post-consumer recycled plastic. Plans are in place to launch new, renewable packaging by 2025.

Home as Sanctuary

The home is now a sanctuary and center point for most Americans. It's a place for working, cooking and eating, exercising, schooling children, entertaining, staycationing and hobbies. Nearly two-thirds of adults in the U.S. exercise most often at home, reports market researcher [Mintel](#), which may offer some new opportunities in specialized cleaning products, such as [Asutra's](#) Yoga mat detox cleaners.

The all-natural products with scents such as calming citrus, mindful lemongrass, and energizing peppermint come in 4-oz plastic bottles with a pump dispenser.

According to research conducted in the U.S. and U.K. by appliance manufacturer [Whirlpool](#), about 57% of adults are spending on average an extra 7.5 hours at home each day, equating to over two extra days at home per week.

The research also found that about 11% of households are sharing more chores with cooking (65%) and washing dishes (61%) being the top two shared housework. About 16% of adults have taken up a new hobby or skill since the pandemic began. The most popular hobbies/skills are drawing/painting (20%), cooking (19%) and baking (18%).

Cooking and eating more at home benefited sales of dish washing products, which grew 12% in 2020 to \$3.47 billion, says Euromonitor.

Last year, P&G began rolling out its new Dawn Powerwash Dish Spray, which comes in a [Flairosol foam spray bottle](#). P&G says the dish spray, which does not need water to activate its cleaning suds, works five times faster than traditional liquid dish soap. According to P&G research, about 60% of Americans clean as they go during cooking rather than waiting for a mass soaking and cleaning at the end of the meal.

*The brands mentioned in this article are trademarks of their respective owners. Inclusion of these brands in this article is not meant to imply an association with or endorsement from the respective trademark owners.

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The ability to mix work, play and other activities at home, which necessitates clothing changes, helped boost sales of laundry care products, which increased 6% in 2020 to \$14.31 billion, notes Euromonitor.

To improve their home environment and add pleasant scents, many consumers turned to air care products. This home care category saw sales expand about 7% in 2020 to \$5.75 billion.

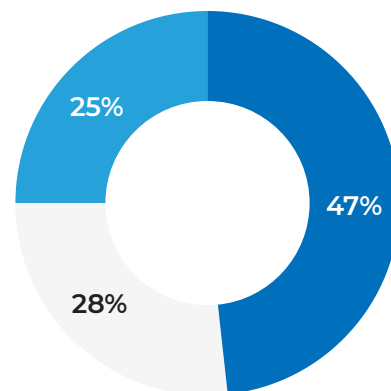
Cleanliness & Wellbeing

Although consumers want effective disinfectants and hygienic homes, they also demand cleaning products that complement their wellbeing and won't harm the environment.

More than 90% of consumers globally believe that a clean and hygienic living environment is important in creating a feeling of wellbeing and wellness, notes GlobalData.

Shoppers are paying greater attention to cleaning ingredients and looking for more natural, plant-based and sustainable products.

Consumers associate labeling claims of “natural,” “organic,” and “free-from” with safety, says GlobalData.



25% Proactively seek only natural ingredients.
47% Proactively seek some natural ingredients.
28% Don't mind unnatural ingredients.

To tap into concerns about wellbeing and product formulations, Reckitt Benckiser introduced a new brand—VEO Active-Probiotics Surface Cleaner—that utilizes bio-based surfactants and probiotics technology for home cleaning. The 99% biodegradable product comes in a 22-oz spray bottle made of 95% post-consumer recycled plastic. A removable label helps consumers properly recycle the packaging.

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What's Next in Home Care?

Like most consumer packaged goods industries, **home care experienced huge volume and sales gains in 2020.**

As the pandemic wanes in 2021 due to expanding vaccination rates, some categories will likely move closer to pre-pandemic market patterns. For example, as consumers head back to their regular workplaces and purchase more meals away-from-home for all dayparts, less cooking will mean less dishwashing.

Face-to-face meetings and commercial offices require more business attire than the casual dress that has become commonplace while working remotely. Consequently, dry cleaning sales should rebound in 2021 while home laundering may become less frequent.

Consumers like a clean and neat home environment, which they associate with wellbeing. To maintain home hygiene and safety, consumers are likely to continue their upgraded cleaning regimens and to use disinfectants to keep germs and viruses at bay for good health.

On January 1, 2021, makers of household cleaning products had to disclose some of their ingredients on product labels in California. New York has similar labeling mandates. Eventually, such labeling may be required at the federal level. **As a result, some home care brands may be taking a closer look at their formulas and exploring effective alternate ingredients to replace objectional chemicals.**



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