

**PNAD-759**

**Agriculture-  
Led Export  
Businesses  
(ALEB)  
Project**

***Strengthening  
Egypt's  
Processed Foods  
Export Industry***

**Package  
Selection and  
Design: The  
Package  
Development  
Cycle:  
A Workshop**

BEST AVAILABLE

**October 26, 2000  
ALEB project  
offices, 5<sup>th</sup> Floor  
Dokki, Cairo**

**USAID-funded Project  
#263-0264**

***Prepared by the ALEB  
Trade Association &  
Services Team:  
Mr. Bob Cirrito  
Dr. Thomas J. Herlihy  
Dr. Mohamed Goman***



## **Agriculture-Led Export Businesses**

*Supporting Egypt's Processed Foods Export Industry*



23 October 2000

The ALEB project is pleased to present this seminar on "Package Selection and Design: The Package Development Cycle." This booklet contains all the Power Point slides that will be used in the workshop today by our consultant, Mr. Bob Cirrito. The slides included are in both the English language and the Arabic language.

Following the material for the workshop is an ANNEX 1 that contains sample information on "Glass Container Specifications and Quality Control." This sample demonstrates the thorough approach that is needed to ensure that the glass jar itself, the lid to seal the glass jar, and the label meet the highest quality standards for the food processing company that will buy and use that glass container. This Annex even contains specifications for the shipper of the corrugated box that will be used to transport the glass jars of food product.

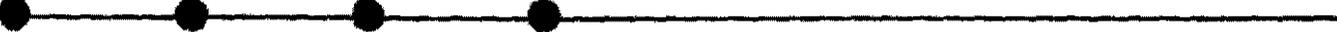
ANNEX 2 contains some reading material that can be found at the internet site for Brand Packaging – [www.brandpackaging.com](http://www.brandpackaging.com). These include articles on how important plastic can be in packaging, how selecting the right color for your brand and labels can influence consumer buying decisions, 10 Great Ideas for Great Food Packaging, and what consumers really want in packaging for their food products, how to work with suppliers when your company goal is to have creative packaging, some six new labeling ideas for food products and eight qualities that separate good packaging from great packaging, among others.

We encourage you to read these articles and to visit the web site so that you and your company can benefit from the most current thinking in the international packaging industry and in international markets.

We look forward to working with you and your staff to strengthen your company's ability to produce and package the highest quality food products in Egypt.

Sincerely,

Tom Herlehy

# **PACKAGE DEVELOPMENT CYCLE**

## **Packaging Selection and Design**

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# WHAT PACKAGING CAN DO

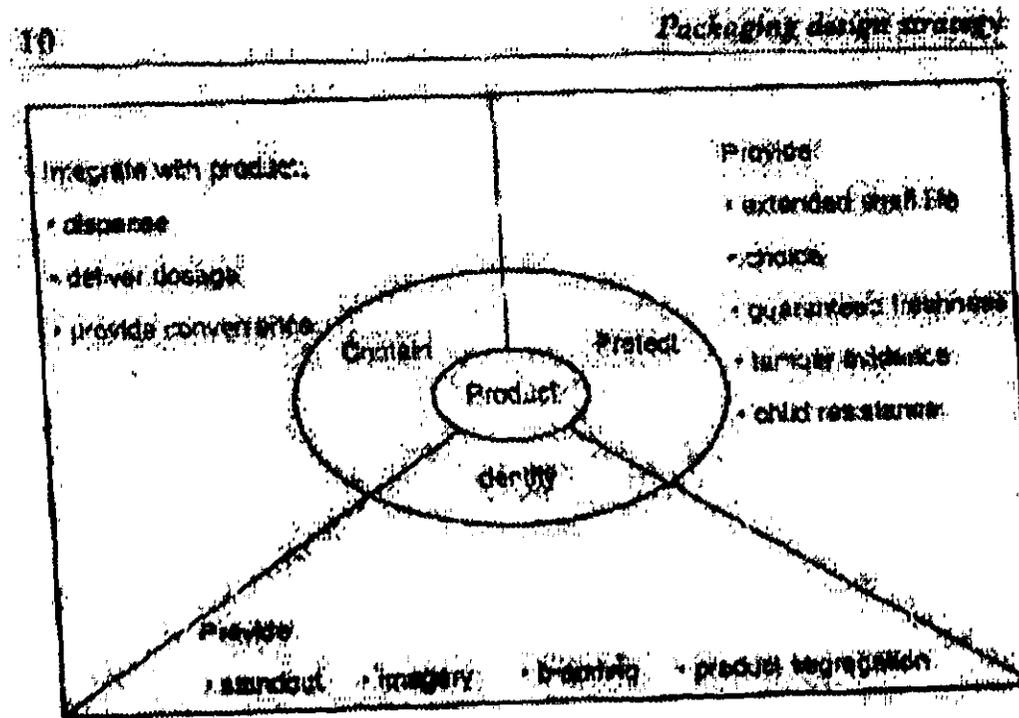


Figure 1.1 What packaging can do

# WHAT PACKAGING SHOULD DO

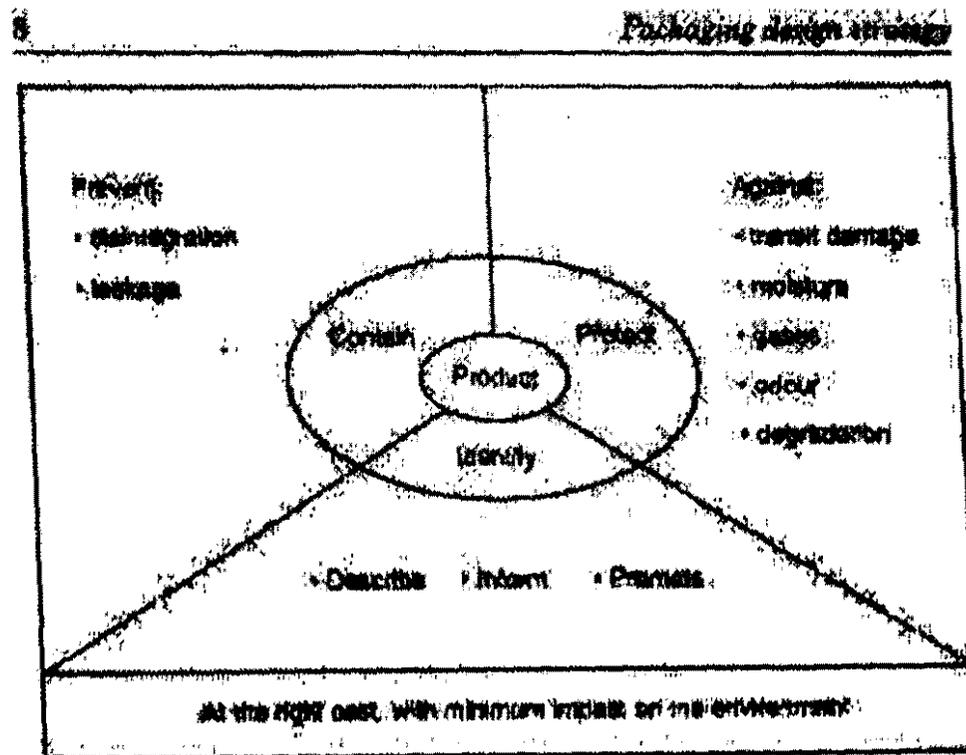
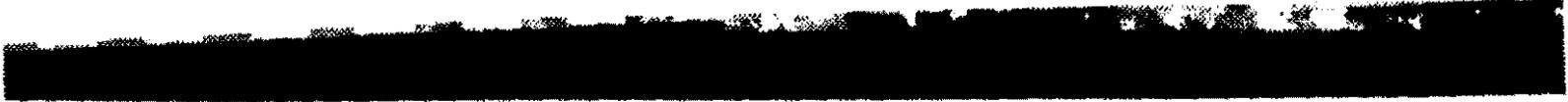
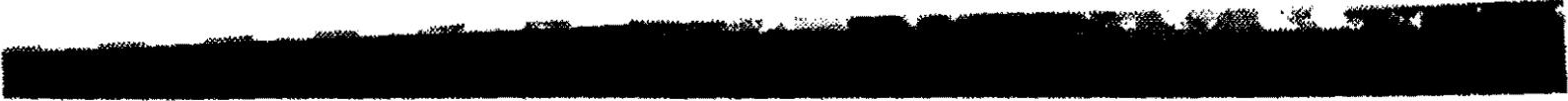


Figure 1.1 What packaging should do



# DESIGN CONCEPTS

- 
- Packaging principles
  - Environmental issues
  - Integrating packaging
  - Packaging design strategy



# DESIGN SOURCES

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- In-house design
- Competitive tendering
- Long-term relationships
- Outside consultancy



# DESIGN SOURCES



- Freelance designers
- Universities and colleges
- Packaging suppliers



# DESIGN SOURCES

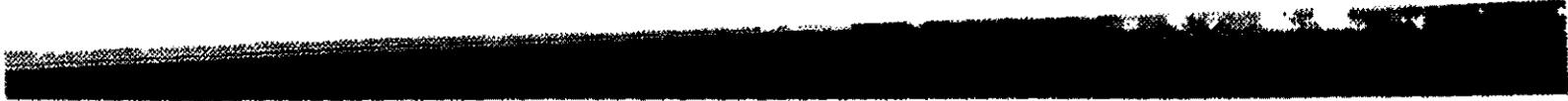
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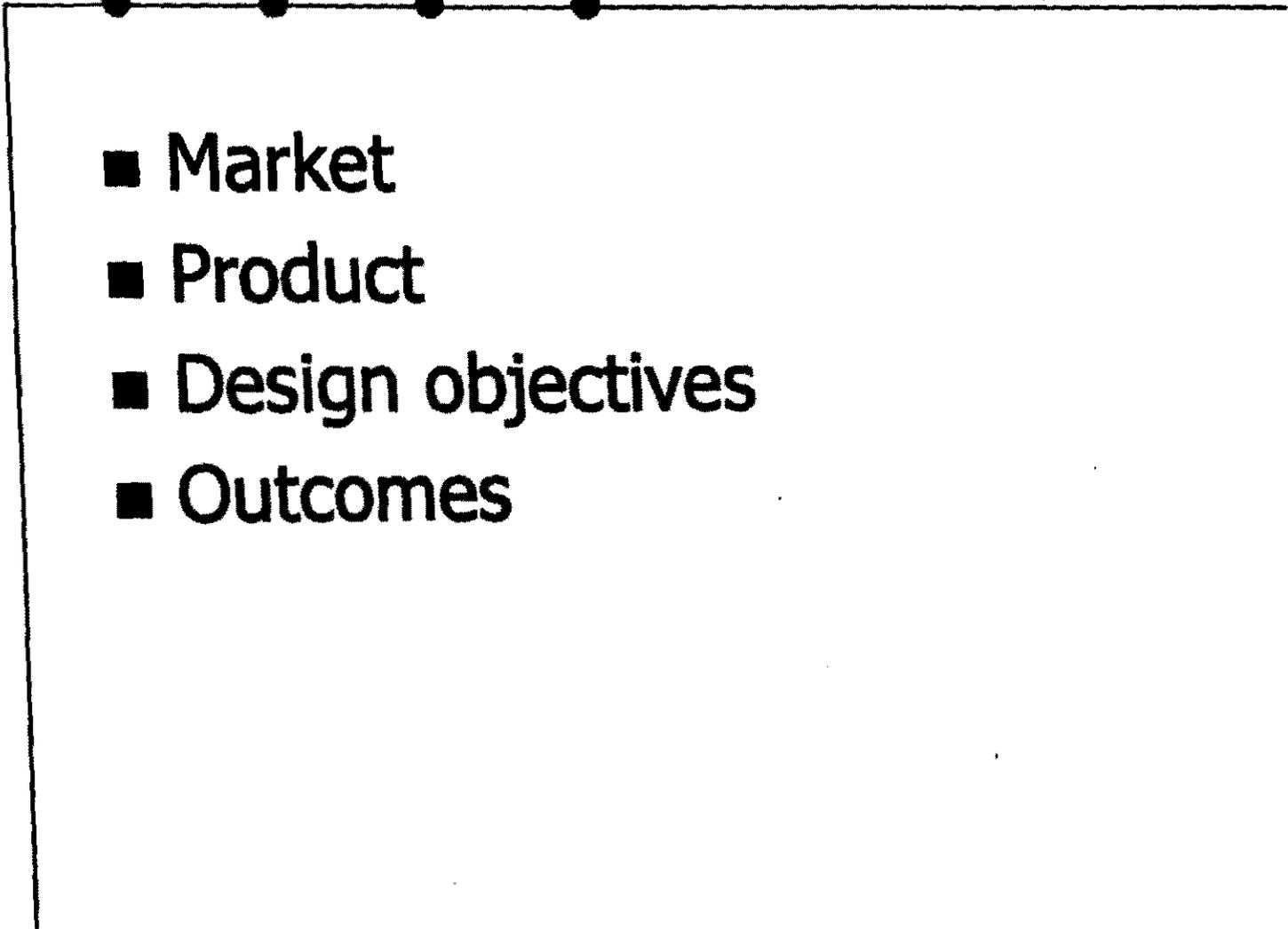
- Budgeting
- Proposal documents
  - Technical brief
  - Cost proposal

# PROJECTED DESIGN BUDGET

Design scheme and budgeting		47	
Topic 1.2 Price breakdown for graphic design of tobacco carton			
Stage	Activities	Fees %	Costs and expenses %
Stage 1	Store survey Purchase of samples Design sketches etc. Experiment with type styles Background colours photography and illustrations Inset in setting Further development Presentation	40	20
Stage 2	Further development	20	10
Stage 3	Extension to other parts	20	10
Stage 4	Artwork	20	60



# PREPARING THE BRIEF

- 
- Market
  - Product
  - Design objectives
  - Outcomes

# PREPARING THE BRIEF

- Consumer requirements
- Technical requirements
- Product requirements
- Purchasing requirements

# PREPARING THE BRIEF

- Warehousing
- Transport and distribution
- Merchandising
- Printing

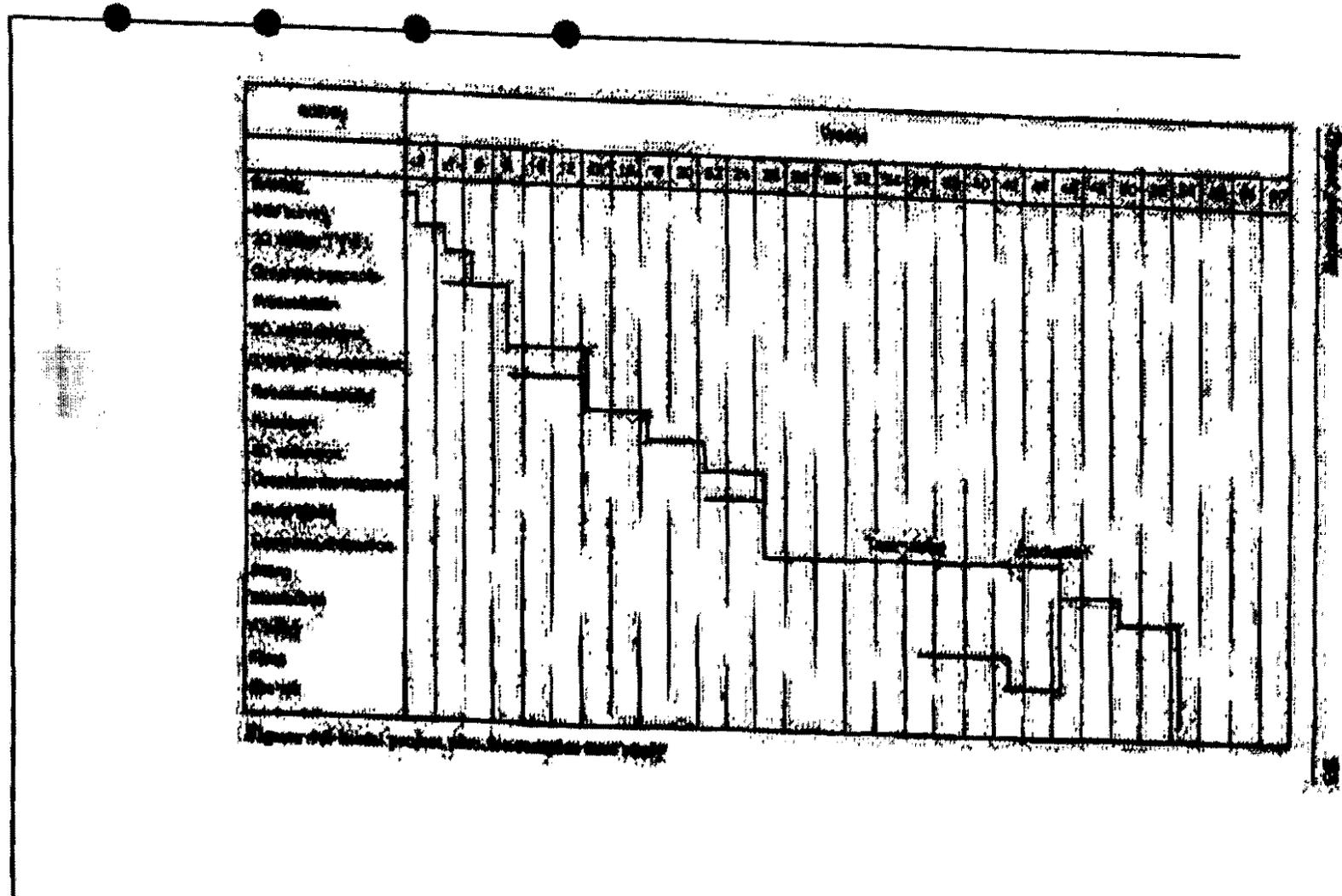
# **PREPARING THE BRIEF**

**Legal considerations  
Environmental  
concerns  
Administration**

# PROJECT PLANNING

- Project outline
- Simple study
- Complex study

# PROJECT PLAN TIMELINE



# PREDESIGN RESEARCH

- Store surveys
- Retailer discussions
- Advertising-agency discussions
- Production site visit



# **THE DESIGN PROCESS**



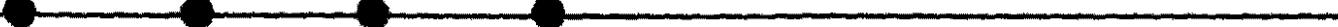
**PRESENTATIONS**

# THE 3-D DESIGN PROCESS

- Shape
- Nature of product
- Product imagery



# **THE 3-D DESIGN PROCESS**

- 
- Point of sale
  - Targeting marketing sectors
  - Size
  - Consumer benefits
  - Materials selection
  - Role of suppliers

# GRAPHIC DESIGN

- Design influences
  - Tradition
  - Competition
  - New technology
- Colors
  - Male
  - Female
  - Children
- Brand strengths
  - Loyalty
  - Standout
  - Imagery
  - Message
- Method of working
  - Sketch/draw
  - Detail
  - Mockup/proof



# **ARTWORK/ REPRODUCTION**

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- Copy preparation
- Artwork preparation
- Print methods
- Artwork library systems

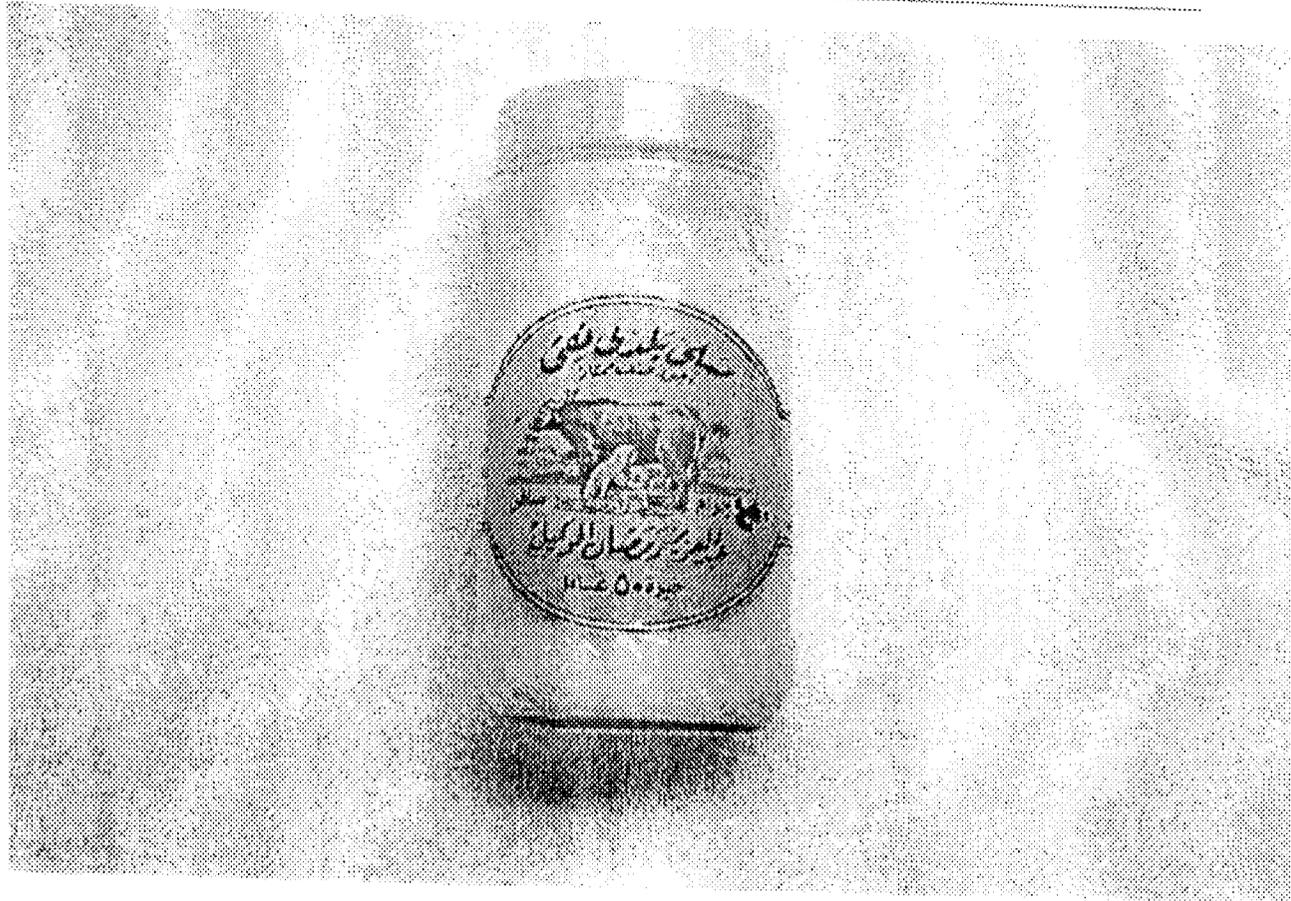


# **STRATEGIC PACKAGING DESIGN**



**Market research**  
**Communication**  
**The future**

# Egyptian Packaging



# Egyptian Packaging



# SPECIFICATIONS

What are they?

Working  
document

Communication

Active

How do we use them?

Control  
material/process

Monitor outcomes

Evaluate performance

# SPECIFICATIONS

- Complete
- Clear
- To the point
- A spec should be detailed to minimize the risk of failure and sufficiently flexible to permit change and improvement

# **SPECIFICATIONS DEVELOPMENT**

- A packaging engineer:
  - Laboratory tests
  - Writes draft specification
  - Draft reviewed in company
  - Modifications made

# **SPECIFICATIONS DEVELOPMENT**

- A packaging engineer:
  - New specification issued
  - Sent to vendors
  - First production run made
  - Formal specification issued

# **FUNCTIONAL AND MARKETING CRITERIA**

- 
- 
- 
- 
- **New packaging cycle**
  - **Idea, concept, prototype, structure, test, graphics, pilot scale, packaging operation**
- **Developed packaging**
  - **Structure, changes, test, graphics, pilot scale, packaging operation**

# **FUNCTIONAL AND MARKETING CRITERIA**

- **Customer needs**
  - Information – text and graphics
  - Product protection – freshness
  - Consumer function - opening and dispensing
  - Handling and storage – shelf life
- **Manufacturing requirements**
  - Manufacturability at converter plant
  - Cost
  - In-house packaging line compatibility - runnability

# SPECIFICATIONS

## Written Elements

- Spec name
- Number
- Date issued
- Scope – what is covered
- Characteristics for
  - Climatic protection
    - Temperature, humidity, chemical, light, contamination
  - Mechanical protection
    - Impact, abrasion, crushing, vibration

# SPECIFICATIONS

## Written Elements

- Boiler plate statements
- Standards for testing (including sampling plans and AQL levels)
- Engineering drawings/graphics
- Approval signatures

# SPECIFICATIONS

## Written Elements

- **Consumer function**
  - **Opening/closing**
  - **Dispensing/pouring/metering**
  - **Reclosing**
  - **Storing/handling**
  - **Disposal/reuse**
  - **Graphic – identify, instruct, state cautions and mandatory information, create favorable impression for purchase**

# **SPECIFICATION CONTROL**

---

## **System for issue/revision**

- **Numbering**
- **Sign-offs**
- **Approval/issuance**
- **Obsolete copies**

# **SPECIFICATIONS IN MANUFACTURING**

**Incoming check and release to factory**

**AQL, pass/fail**

**Monitoring packaging performance in  
manufacturing**

**Seals, closures, aesthetics, function**

**Packaged product test and evaluation (not  
approval**

**Warehousing of packaged/cartoned product**

# **SPECIFICATIONS IN QUALITY CONTROL**

**Monitor**

**Test**

**Hold/Quarantine**

**Approve**

**Release**

# SPECS vs. STANDARDS

- A specification is an accurate description of a package form that describes its performance characteristics and the limits for acceptability and use
- A standard is a procedure that is used to measure a performance characteristic and specifies an acceptance/rejection level criteria

**All specifications include testing standards**

# THE BUYER- SUPPLIER RELATIONSHIP

- Partnership
- Multiple or secondary vendors
  - Service
  - Cost
  - Distance
  - Capabilities
  - Support
- Technical support
- New technology ideas
- Package improvement, design and testing
- Cost reductions

# STANDARD ISSUING ORGANIZATIONS

- American National Standards Institute (ANSI) <http://www.ansi.org>
- Technical Association of the Pulp and Paper Industry (TAPPI) <http://www.tappi.org>
- American Society for Testing and Materials (ASTM) <http://www.astm.org>

# Industry Organizations

- Institute of Packaging Professionals (IoPP)  
<http://www.iopp.org>
- International Safe Transit Association  
(ISTA) <http://www.ista.org>
- Uniform Code Council (UCC)  
<http://www.uc-council.org>

# R&D/QC LABORATORY

- Test incoming and finished packaging
- Perform physical, chemical, environmental and analytical testing
- Lab equipment validation
- Daily procedural lab operation
- Quarantine/reject
- Approve and release

# **Package Selection and Design: The Package Development Cycle**

## **ANNEX 1**

### **Sample Glass Container Specifications and Quality Control**

representative and in several

for the components of the  
sting points, and behind that  
both suppliers' and packers'

**SPECIFICATION FOR: 1-Quart Mayonnaise Package NUMBER: 714760**  
**PROPERTY OF THE XYZ COMPANY EFF. DATE: October 1, 1986**

**I. SCOPE:** This specification covers construction and performance requirements for a glass package to protect and distribute retail mayonnaise. It is for use at all plants, and replaces 71474 dated August 1, 1985.

## **II. CONSTRUCTION**

- A.** Jars shall be made of flint glass. A bottom stacking feature is required.
- B.** Attached Print No. 520\* is a part of this specification, with its dimensions, weight, capacity, and their tolerances. Wall thickness and glass distribution in the container shall be adequate for the packing and shipping stresses to which it is exposed.<sup>†</sup> Finished goods may be shipped by rail or truck.
- C.** Deviation of the finish from the flat shall not exceed 0.015 inch in any 60° of the circumference, nor shall it exceed 0.030 inch around the entire 360°. The lip of the finish shall have a flat surface for sealing, not less than 0.030 wide, and preferably 0.060 inch.
- D.** Out-of-round at the finish shall not exceed 0.030 inch. The label area shall be symmetrical so as to permit complete adhesion of spot labels. Jars shall stand squarely on their stacking beads. Leaners shall not exceed 1/8 inch on a side.
- E.** Jars shall be free as commercially possible from defects such as bubbles, checks, chips, cracks, stones, stresses, and thin spots.
- F.** Glass shall be free from contamination with any foreign matter that cannot easily be removed by washing before filling.
- G.** Jars are to be treated on the outside with low-friction coatings. Formulas shall comply with applicable legal regulations and

\*See Figures 5-1 and 5-2, pp. 75 and 76.

†If the bottom panel formed by the baffle in the parison mold is wrong outside the stacking head, the possibility of thin sidewalls is indicated. See Sec. V, DEFECTS.

esion. After approval by  
y, no coating formulation  
valuation, and reapproval.

cts associated with break-  
the lowest possible com-  
rage on a packaging line  
ue to identifiable Class A  
set aside for investigation,  
sted.

for XYZ Company to use  
ion, such as:

shippers

ory for outbound shipment  
ntain any broken glass shall

performance found by XYZ  
gh channels within 24 hours  
ly defective glass shall be

a lot shall be defined as a  
ickload of 15,000 to 30,000

lot has been inspected be-  
lance with MIL-STD-105D,

Level	AQL
	0.65
	1.0
	6.5

Inspection for Class A defects shall follow Sample Size M in 105D. 315 specimens shall be selected from a lot, taking the specimens equally for all mold numbers represented, with acceptance up to five defects and rejection on six or more. The objective of the Class A specification is to achieve 95% assurance of less than 1% defectives in the jars received in any lot.

Specifications for Class B and C defects are intended to assure the operation of manufacturing controls on dimensions and appearance.

The supplier is considered responsible for conditions caused by his shipper which may make a lot received unacceptable.

- C. Lots that fail the above inspection shall not be delivered by the supplier, who is expected to cull out defective material before shipment. If any lot fails the performance specification, it shall be inspected by XYZ quality inspectors in accordance with the plan specified in IV.B, above; should the lot be found within control, packing-line conditions shall be examined as possible causes. If the lot is found out of control, it shall be set aside for supplier reinspection, with notification to the Plant Buyer. Negotiation shall determine whether questionable lots are acceptable as a business decision, with provision for special attention in processing.

**V. CLASSIFICATION OF DEFECTS**

a. Class A defects: those deviations from spec which prevent glass containers from performing their intended function of safely containing the products for which they were made, through a normal cycle of distribution and use, including:

1. cracks and penetrating checks
2. blowouts and light sidewalls
3. broken or chipped finish
4. contamination with dirt, insects, or any other foreign matter except fiber dust which can be easily removed by washing prior to filling

B. Class B defects: deviations from spec which render durability or packing-line fit questionable, including:

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ecified tolerance, such  
nish

is  
rsely affect the appear-  
container, including:

# PACKAGING MATERIAL SPECIFICATION

PROPERTY OF XYZ COMPANY

DATE Oct 1, 1985

No. 754750 (1 of 2)

ITEM Glass Jar, 1-Quart Kapenealac

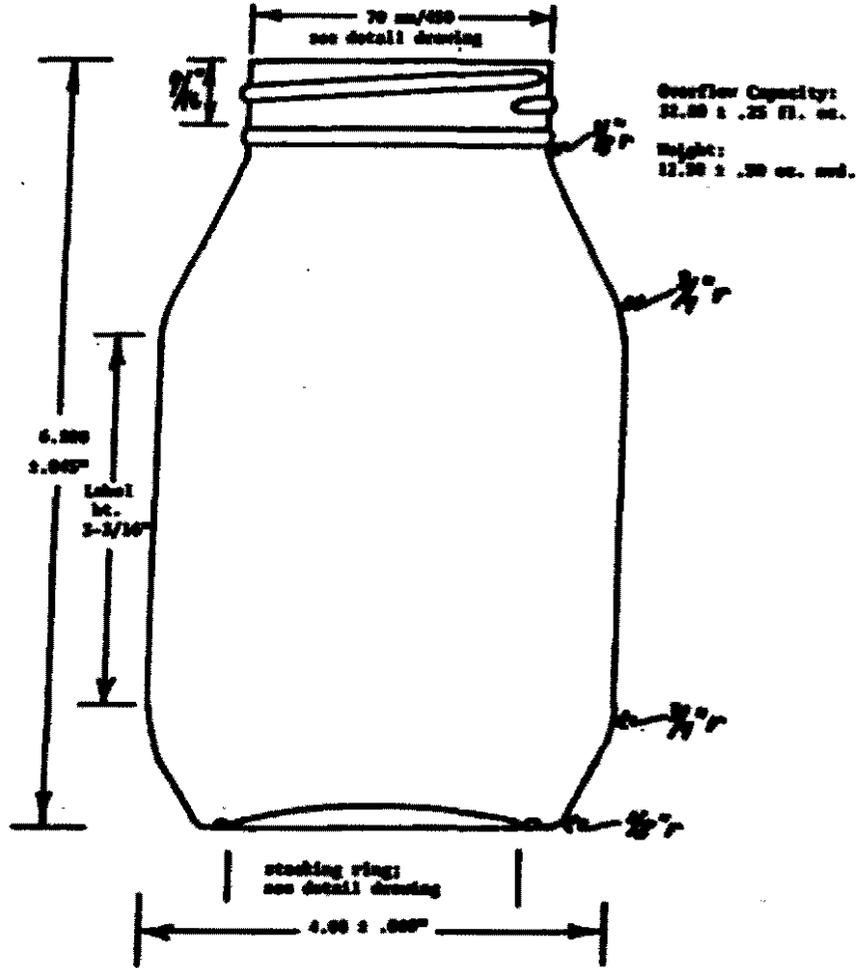
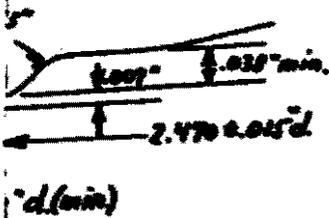
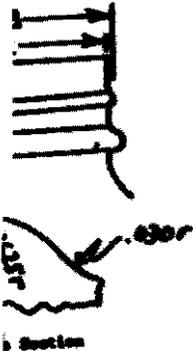


FIGURE 5-1 Print No. 520 (entire).

## SPECIFICATION

No. 714752 (2 of 2)

See detail



SPECIFICATION FOR: Closure, 1-Quart Mayonnaise NUMBER: 714752  
PROPERTY OF THE XYZ COMPANY EFF. DATE: October 1, 1995

- I. **SCOPE:** This specification covers the construction and performance requirements for a continuous-thread metal cap used as the closure for 1-quart glass bottles of XYZ Mayonnaise. The corresponding glass specification is 71450, October 1, 1995.
- II. **CONSTRUCTION:** The cap shall be made to fit GCM Finish #450, 70-mm size. Dimensions and tolerances shall conform to Print No. 519,\* attached, which is part of this specification. Other construction features shall be as follows:
  - A. Steel used for making the cap shall be TFS/CCO,<sup>†</sup> 80 lb/base box, temper T-3.
  - B. The exterior shall be lithographed according to separate graphic designs. A clear scuff-resistant varnish shall always be applied over the inks.
  - C. Caps shall be lined with a food-grade pulpboard 0.040 inch thick, with a facing on the product side of a vinyl-coated paper impervious to the oils in mayonnaise, and containing no ingredients which will support bacterial or mold growth. On filled jars, caps shall hold nitrogen headspace flush.
  - D. The cap shall have a stacking feature which matches that on the bottom of the jar.
  - E. The interior side of the cap metal shall be coated with a food-grade varnish that is oil- and acid-resistant and gold in color.
  - F. The liner disk shall have a minimum diameter of 2.700 inches, and the inside diameter of the liner retention bead in the metal cap shell shall be not over 2.680 inches nor under 2.660, so as to always hold the liner in the cap but not interfere with the "E" dimension of the glass finish.

\*See Figure 5-3, p. 80.

<sup>†</sup>Tin-free steel, chromate/chromic acid electrolytic coating.

and rigid enough to resist handling, including hop-  
n to glass at torque levels  
ictional properties of the  
will be such that in normal  
torque is not lower than  
torque.

XYZ Plants in corrugated  
will be end-loading style,  
s at each end. Flaps shall  
be so:

No. 714752, 1000 pieces  
Date of manufacture

sufficient quality control to  
on. Suppliers are held re-  
sponsible in making deliveries

l be reported to the Plant  
nd via the Quality-Control  
Class B defects combined  
s set aside for reinspection  
ppiler. Class C defects shall  
shall be brought to the at-  
chasing Agent.

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ig and communication:  
in the cap

extent that cocking occurs

let do not engage the glass

aphy

6. dimensions outside of tolerance limits
7. incomplete or sharp edge on rolled bead

**B. Class B: defects which cause borderline functionality:**

1. liners loose and partially hanging out
2. copy illegible in lithography or color off standard
3. bulges or dents in the center panel of the cap

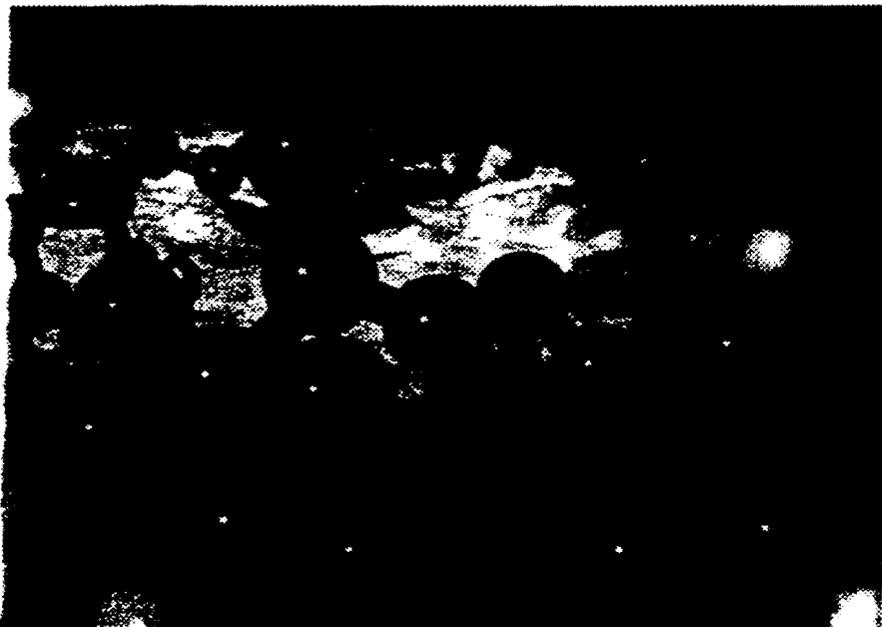
**C. Class C: defects which impair appearance but not function:**

1. blotchy lithography
  2. scratches or scuff marks on outside surface of cap
  3. rust spots from inadequate enamel coverage anywhere on the cap
-

# AS MARKETS DEMAND MORE OF PACKAGING, PLASTIC DELIVERS



*Mass customization replaces mass markets, and plastic packages meet an expanding array of market, technical requirements.* BY RICHARD MORRISON AND MEL DRUIN



**M**ass customization is in and mass production is out as marketers of packaged goods focus on catering to smaller and smaller niches.

More and more specialized niche products saturate the market. Here's one example—beauty aids targeted girls between the ages of 11 and 14. Another example—energy beverages targeted at 50-something athletes who want the stamina they had a decade earlier.

And the trend is demanding more and more special characteristics in packaging. The package no longer just houses, displays and advertises the product. The package has to deliver added value.

Often, it will cook the product. It will chill it. It will dispense the product. The package has to be light, portable, clean and attractive.

And, most likely, it will be made of plastic.

The package of the future will either be all plastic or plastic will be the significant component that makes it work. Technology is demanding ever-greater functionality from the packages.

Plastic answers those needs because the range of materials has reached a high level of performance.

Nothing shows the strength of the plastics revolution as much as the replacement of glass in the beverage, juice and sauce categories.

#### **Polyester is the "hot button"**

Those replacements are based on polyester—the "hot button" material. The domination comes from the characteristics exhibited by polyester—lightweight, portable and virtually unbreakable. These factors answer production and distribution needs.

Polyester will become even more prevalent as issues of gas and moisture barrier—largely in food packaging—find answers.

On one hand, food and beverage companies are relaxing significant performance requirements like shelf life for products. The typical plastic package is now required to deliver a shelf life of six to nine months, as packagers compromise on shelf life to achieve the balance between cost and performance. With glass packages, those same marketers were asking for a two-year shelf life.

#### **Complex PET bottles**

The leading technology to enhance barrier performance against oxygen for the PET bottle involves multilayer structures with barriers such as EVOH or nylon in combination with oxygen absorbers. In particular, oxygen absorbers in the headspace are now coming on-stream. Coatings are also being developed for single-serve juice, beer and carbonated beverage bottles. These coatings include silicon dioxide. More recently, carbon barrier coatings are being applied to plastic bottles.

Both materials developments and bottle-making technologies are increasing the temperature at which PET bottles can be filled. They continue to rise, and PET containers will have the ability to handle the range of foods currently hot-filled in glass.

The ability of plastic to be made into any shape is also a driver. There is a natural tendency to look at a one-for-one replacement of the original glass bottle. But plastics offer much wider design latitude in shape, styling and graphics to achieve packaging differentiation that promotes product distinction and brand awareness while meet- **CONTINUED ON NEXT PAGE**



CONTINUED FROM PREVIOUS PAGE  
ing consumer preferences.

The allure of plastic is not just grounded in technical developments. At the root is the ability of plastics to answer the on-the-go requirements that are the hallmark of the changing American society.

The combination of social changes and technical advances in plastics will relegate glass to a role of a specialty package.

The omnipresent water bottle provides the best example the power of plastic packaging. It offers squeezability and the "sports" closures for easy delivery to people as they move during their day's activities. It has so penetrated and changed perceptions that

other plastic packages are following it into the office, classroom and automobile. Consider on-the-go snack kits coming from cereal marketers; they use a thermoformed "lunch box" to carry meals in plastic and paper-board components.

#### Microwave in the minivan

The fact that some year 2000 model vehicles contain microwave units to heat up snacks will lead to even greater proliferation of the "lunch box" category. Plastics make possible reheatable, portable breakfast foods and other portable meals.

We expect rigid plastic packaging to continue to be the fastest growing segment in the United States, growing at about 5 to 6 percent a year, while glass continues to be the weakest segment. Rigid PET bottles and wide-mouth jars will continue for custom applications such as foods and non-carbonated beverages. This growth will continue at a rate of 10 percent per year.

But even within the area of plastics, significant changes are occurring—most significant, the shift from rigid plastic containers to bottles to flexible containers such as pouches.

The use of the stand-up pouch for snacks, pet foods, soup, beverages and water is expanding on an almost weekly basis.

The driver is the changing nature of the stand-up pouch itself. They can be made into proprietary shapes with easy-open features. The fill rate has been increased from 120 per minute to 400 per minute for liquids. Totally integrated form-fill-seal systems add to the attractiveness.

Pouches are also addressing the issue of shelf life with the use of coat-

ings such as silicon dioxide buried between layers of the flexible materials. And the use of oxygen absorbing materials such as Amoco's Amosorb and Cryovac's materials are stretching shelf life.

From a technical side, the use of films made with resins produced by the metalloocene process gives better performance than the use of lighter gauge films.

#### Cans

If your package is a nonbeverage metal can, you can expect to see improvements in this standard bearer of packaging. Cans are being upgraded, largely based on how plastic coatings are being applied to them.

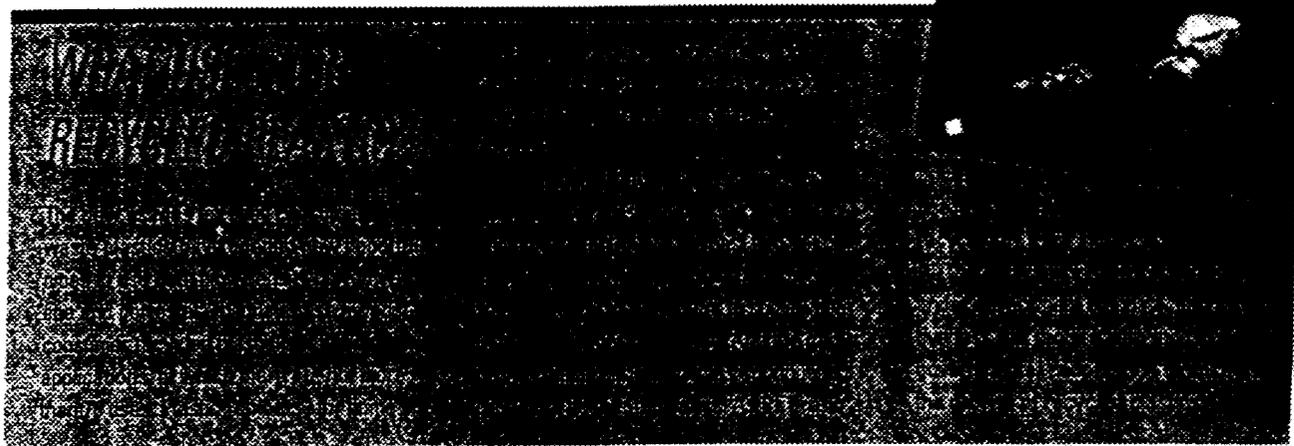
In the United States, today's can has a coating that is sprayed onto it after the can is formed. But development in both Britain and Japan should translate effectively to the United States.

In those countries, the metal for can-making has a layer of polyester laminated to the metal before it is made into a can. That eliminates the need for coatings and the problem can makers face with emissions.

The lamination process offers two advantages: improved appearance and better scuff resistance. These laminates are better than spray coatings, and among other advantages, they possess improved high-acid and corrosion resistance. ■

The authors, Richard Morrison, Ph.D., and Mel Driscoll, Ph.D., are with the Summit Group, a Summit, N.J.-based consulting organization. Morrison is the Chairman and Driscoll the Senior Technical Director. Reach them through the Summit Group at

908.277.3212



# INNOVATIONS FROM JAPAN: READY TO ENTICE U.S. CONSUMERS?

*Packages stress convenience, high quality and creative merchandising—  
traits that answer challenges U.S. marketers face.* BY NEIL J. KOZARSKY

Japan's population is a little short of one-half of the United States' with about 126 million. Japan is roughly the size of California, but after taking into account bodies of water, forests and mountains, the Japanese live in a space equivalent to the state of Connecticut.

The concept of source reduction—making the original package as minimal as possible—is ever-present in daily life. It's unlike the United States where environmental consciousness vacillates or is quickly abandoned whenever "green" economics become unfavorable.

But source reduction is not the only—or most important—determinant of package style in Japan. Spend a few moments in a supermarket or in a convenience store (the most profitable type of retail outlet in Japan) and you will see that, like all cultures, Japan reflects its own values and idiosyncrasies in a unique packaging style.

The need for creative merchandising at the point of sale in an extremely competitive visual environment is a

pressing issue.

Companies that have attempted to market products in Japan know that every package detail is expected to be perfect (graphics, registration, weight). Those that don't reach perfection will never reach the consumer shelf.

"Mastery of detail" and a reflection of high quality are overriding obligations that manifest themselves in all aspects of Japanese life, including packaging.

That's one reason it will be interesting to see how some uniquely Japanese packaging innovations fare in the United States.

The histories, culture, language and world views of each culture are disparate, but there appears to be packaging approaches and technologies that could make the leap across the Pacific.

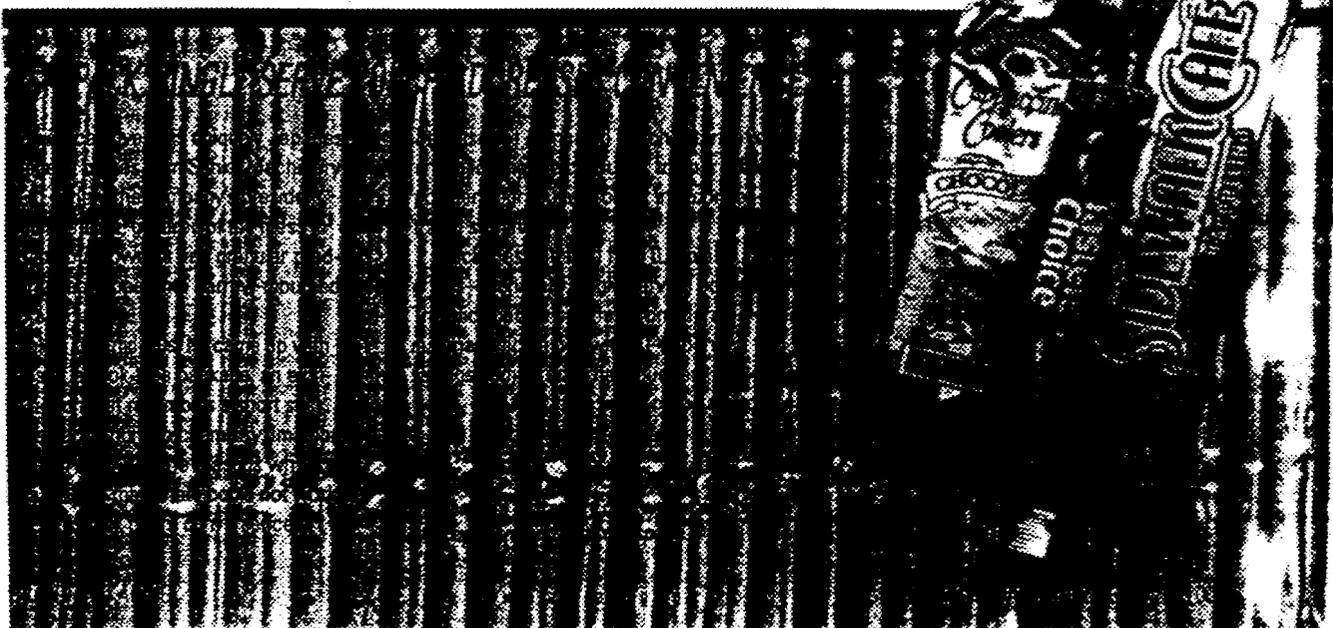
Most significantly, the Japanese packages detailed in this article may help marketers respond to increasing consumer demands for convenience. Under the umbrella, here are some key components consumers increasingly want:

- Portability
- Hand-purse and pocket friendliness
- Flexibility
- Versatility
- Easy-fit stability
- Eco-sensitivity and home-trash reduction
- Easy opening
- Easy access to the product

(See the article "What consumers want is seamless packaging" in the November/December 1999 issue of BrandPackaging. The article is on the Internet at [www.brandpackaging.com](http://www.brandpackaging.com).)

Ultimately, it's consumers who decide just how many (if any) innovations match the definition of convenience and how much of the market.

The author, Neil J. Kozarsky, is a H.E.M., a company that specializes in packaging markets for over 25 years. Contact Neil at 86.234.1100 or e-mail [neil@hem.net](mailto:neil@hem.net)



# SAGA SOFTWARE: BUILD A BRAND BY THINKING BEYOND THE BOX

*The product is business software. But this company thinks like a consumer marketer in establishing a new brand.* BY JAMES W. PETERS

Saga Software Inc. may be a marketer of business software. But its branding and packaging strategy would be the envy of many leading-edge consumer product marketers.

Consider some of the steps that the Reston, Va.-based company has taken in establishing its brand and leveraging it with packaging. It has:

- Adopted purple as the defining color in its branding and packaging.
- Done an in-depth analysis of how its customers actually use the packaging for its product.
- Integrated packaging into its overall marketing communications program.

Saga develops enterprise integration software. For noncomputer types like me, that means software that lets different kinds of programs on different computers "talk" to each other.

What is significant is that Saga takes a savvy, consumer-marketing approach in this business-to-business segment.

The company has a 25-year history as a part of its former German parent company, Software AG. It emerged as an independent U.S. company in 1997. As an offspring, its first products were those developed and branded under its parent's identity.

But as a "new" company, Saga saw its most immediate challenge being the establishment of its own brand identity.

Part of the strategy was to emphasize brand along with product. It is an uncommon strategy among high-tech companies where the marketing emphasis usually stresses products.

While R&D began to work on new products, marketing began to create the Saga brand. The company relied on an internal task force to steer the effort.

One of the task force's first steps was to get outside expertise. It went to Fitch Inc., a corporate identity and communications firm with a



*Kristina Cortés, Director of Brand and Marketing Services for Saga Software Inc., shows off the company's new packaging with the pride of the parent of a new child. The strong purple pegs a key branding move.*

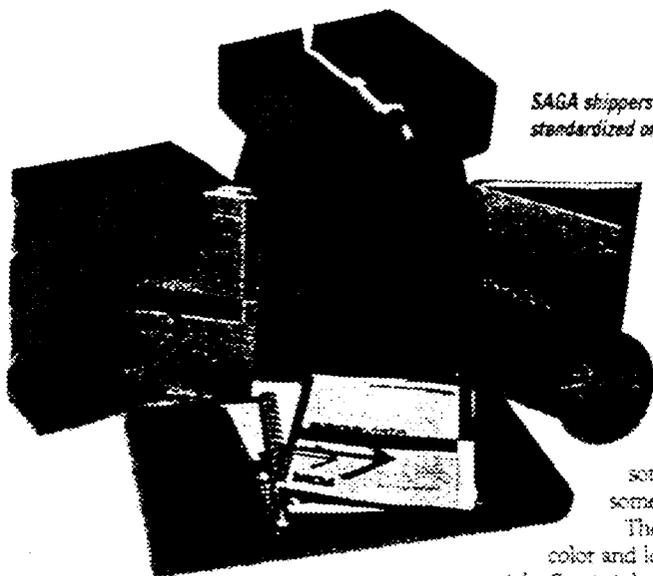
reputation for top-flight business marketing programs.

The boldest of Fitch's recommendations was to use purple as a defining color. The proposal was not based on specific associations related to purple. Rather, Fitch felt that the use of any of a number of bold colors would meet

the objective of positioning Saga as a leader in the market segment.

#### How color is used

"It's more how the color is used rather than what it is," says John McVey, Associate Vice President at Fitch. "Purple is a compelling color. How it is" CONTINUED ON NEXT PAGE



SAGA shippers are modular in size. Because they carry documentation, the "footprint" was standardized on a 9-inch x 7-inch size. Heights vary to accommodate different sizes of orders.

used is as important as the color itself."

Being perceived as dynamic is important, especially in positioning the brand in this market segment. According to McVey, most colors in the business-to-business software segment are "safe and traditional," with an amazing dominance by "corporate-America blue." In that environment, a vibrant color such as purple stands out.

"We are approaching the business

market in the same way we approach consumer projects," he explains.

Kristina Cortés, Saga's Director of Brand and Marketing Services, concurs: "You have to have something that stays in somebody's mind."

The selection of the color and logo typography was quick. Cortés jokes that "it probably took longer for the local government to approve the sign change on the outside of the building than it did for Saga to adopt the logo."

The brand made its debut in early 1998 in an advertising program that began to position the company as an innovator.

The brand began to permeate advertising, stationery and collateral material—the company's range of print presence. Logically, Saga looked to extend the brand to packaging.

Existing packaging was typical of companies without a strong brand program. Each product was in a package that looked good by itself, but together, the entire line of products lacked consistency.

Packaging relied on cartons that carried two basic deliverables—documentation and media. The media could be disks or cartridges.

The cartons themselves offered little brand identity. They were different styles—some had flaps, others were slip cases. Graphics were good, but they diverged widely, too. They did little to deliver consistent brand messages or indicate hierarchy.

When Saga shipped an order, individual cartons went into standard brown corrugated shippers. Shippers were filled with cushioning—bubble pack or "peanuts."

When shippers arrived, they made little impression on customers. "From a customer standpoint, you didn't know who was sending you this product," observes Cortés.

At this point, Saga took a significant step in turning its packaging into a marketing tool.

It decided not to just superimpose

new graphics onto existing packages. Rather, it was going to evaluate its entire packaging program from ground zero.

It tackled that task as if it were a consumer goods company by asking a simple question: "How does our customer use our packaging?"

In general, Saga knew that software customers throw away 60 percent of all packaging. Certainly, the corrugated shippers, cushioning and cartons Saga used offered little to entice the customer to keep, or even remember, any of it.

But Saga went further to learn exactly how people actually used the packaging. It shipped actual orders to Fitch where staffers unpacked shipments.

The design firm's staff documented the incoming packaging—what was there, how it was removed and what happened to the packaging. They photographed the entire process. This audit started the instant a shipper was opened to the point where bubble wrap was thrown away.

#### Under a "microscope"

It was an "out-of-the-box experience" that put packaging under a "microscope." And it showed why the packaging wasn't working. It confirmed three things:

■ First, customer observations were that cushioning materials were wasteful. Often, a box was half-filled with bubble wrap or "peanuts." Customers complained about having to throw

CONTINUED ON NEXT PAGE

## IT TAKES A TEAM

In the leading-edge approach to brand and packaging development, Saga Software Inc. managed the process with a team that encompassed marketing, operations, R&D and creative functions.

Members included Michael Collins, VP Corporate Marketing; Kristina Cortés, Director of Brand and Marketing Services; and Tim Hill, VP Worldwide Marketing and International Operations.

Other team members were Al Areval, Manager, Production and Distribution Services; Kim Enger, Manager of R&D Documentation; Gene Frantz, Director, Sagavista Solution Suite; and Sherri Ross, Senior Marketing Specialist.

John McVey, Associate Vice President at Fitch Inc., was also an integral member of the team.

## AT A GLANCE

**Saga Software Inc.**

Reston, Va. Founded in 1997 as a spin-off from German-based Software AG.

**Brands:** Sagavista™, enterprise integration software. Through marketing agreements with Software

AG, Saga also markets that company's Adabas®, Natural® and EntireX® products.

**Revenues:** \$249 million in 1998.

away these materials.

■ Second, the cushioning didn't work that well anyway. Some cartons were "dinged" in transit. On occasion, the media itself was damaged.

■ Finally, shippers were difficult to handle. Sometimes, the gross weights would approach the 50-pound maximum for safe lifting.

The analysis suggested an innovative course of action:

Eliminate all the individual cartons and shippers and develop custom shippers that worked as both carton

*The SAGA shipper became the package for a promotion. Michael Collins, VP Corporate Marketing, shows off a basketball promotion encased in the shipper.*

and shipper.

Saga did that by adopting a standard 9-inch x 7-inch "footprint" for all shippers. That shape conformed to the standard dimensions of documentation.

With a standard "footprint," Saga could get the variety it needed to fill different orders by varying the height of shippers. It has three standard heights 3-, 6- and 8-inches, each with the same 9-inch x 7-inch base.

The boxes themselves are made of a standard corrugated paperboard material. However, they are boldly decorated in the company's defining purple. The color is printed on both sides of the corrugated paperboard, creating a uniform look both inside and out.

On five of the six exterior faces, the Saga logo is printed in a purple tint to complement the base color. "That way, no matter where they put a label, we have a brand identity," says Cortés.

The three size variations reduced the need for cushioning, but there were still instances when an order didn't fill a shipper. Saga was determined to handle those orders without any cushioning.

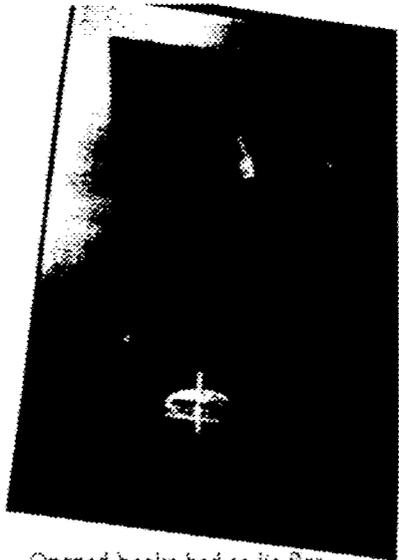
The answer was a unique "seat belt" fastener that used a plastic strap to secure components within the carton. The strap wraps under a shipper, up the sides and then latches at the top. A slot in the shipper's base allows the "seat belt" to fit snugly over any height of documentation or media.

The configuration also secures media that holds the software. The media could be either CDs or cartridges. They are contained within custom-designed corrugated inserts, which immobilize them in transit.

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Opened books had to lie flat, precluding techniques such as perfect binding that do not allow a booklet to lie flat.

Finally, they had to accommodate a just-in-time production process that let the booklets be produced as needed, rather than being stocked.

The answer was a wire-bound booklet. It is produced on a multi-color laser printer to specific orders, that eliminates inventory and allows changes in documentation as the software is updated.

The booklet fits inside of an innovative sleeve binder. It includes two spines that display the brand and the product name no matter which way they are placed on a shelf.

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That umbrella also includes electronic components such as icons that appear on user screens when software is run.

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*The author, Jim Peters, is the Editor of BRANDPACKAGING magazine.*

#### Where to go for more information . . .

Design services. For more information about Flack Inc., contact Kristina Pothier at 617-439-3400 or e-mail [kristina\\_pothier@flack.com](mailto:kristina_pothier@flack.com).

## NEW PACKAGING SAVES \$350,000 A YEAR, TOO

The new packaging for Saga

Software Inc. may carry branding punch, but it also delivers a hefty contribution to the bottom line—a \$350,000 annual savings in packaging costs.

It does that by standardizing inventory and by eliminating the need for cushioning in the packaging.

"Before, we had more than 100 packaging components in our shipping department. That included shrink wrap, license agreement envelopes, cartons . . . a complex array of things," says Kristina Cortés. "Now we have just 20 components."

In that old array were numerous randomly sized corrugated shippers. The new system has just three sizes of what is called a telescoping carton. Each size has a top and bottom piece that Saga receives flat from its supplier.

Shipping department staffers manually set up the shippers when they fill an order. Because the shippers closely conform to the products inside, Saga has eliminated the need for cushioning and it has eliminated cartons that customers routinely throw away.

contains conventional pigment."

Other variations of this technique create a wide range of looks. The successful Unilever Thermasilk line, with its distinctive bronze pearlescent finish, shows just how the pigments can be used to create a distinctive dress that differentiates a brand on the shelf.

Part of the visual impact comes from the interaction of light.

Kulka uses the term "optical spacer" to explain how a two-part color system, in combination with a multi-layer bottle, generated new visual effects.

#### How color systems work

For example, a bottle may have a tint in its exterior layer, an opaque or translucent middle layer and a clear inside layer.

That configuration refracts and reflects light in different ways. It gives the designer options to use in order to vary translucence and opacity. A designer may decide on complementary colors in layers such as two shades of blue. The designer could also opt for a contrast such as purple and blue.

With such a construction, a bottle's shape also influences the perceived color. In making a bottle, the plastic layers will stretch differently in areas where the shape differs.

The simplest example would be in the shoulder area of a conventional bottle where the middle and exterior layers stretch slightly more than the interior layer.

Kulka explains how that effect creates a striking bottle being developed for a European cosmetic marketer.

The bottle's base color is black, and the pigment is on the middle layer. However, the exterior layer has a pearlescent pigment that in combination with the black layer appears to be metallic.

The straight front and back appear more brilliant. The metallic appearance dominated these flat areas because the reflectivity is more straightforward.

But at the shoulder and other



Downy switched to a deeper color effect to reflect an upscale image for its newly introduced Premium Care product line.

create specific appearances

#### Frosted bottles

Pigments can create the frosted look seen on glass bottles. However, the pigments only create the visual look, not the tactile sense achieved with frosted bottles. To add texture, you would need to design a mold and tailor it to the resin you are using to get a texture.

#### An iridescent

look. The shimmering iridescent look already exists in plastic films, based on films with a hundred or more layers that refract light and create shimmer and color shifts.

Now, pigment manufacturers have iridescent pigments that create a similar effect. For example, Chroma Corp. has an iridescent pigment that can be used with plastic bottles. It exhibits

round areas, where the top layer stretches, the appearance shades more toward black as the inside layer shows through more.

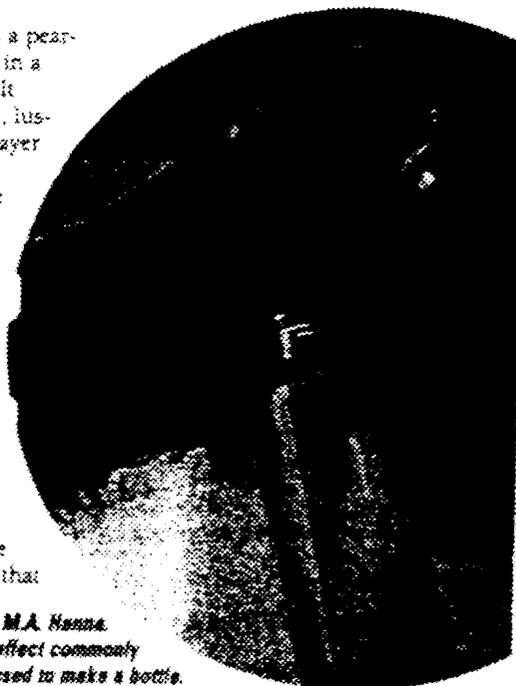
The new generation of bottles can be decorated with the same techniques as standard bottles. They will accept hot-stamping, silk-screening, in-mold labeling and pressure-sensitive labeling, just like conventional bottles.

Some of the effects, such as a pearlescent look, could be created in a traditional single-layer bottle. It could closely yield a brilliance, luster and reflectivity of a multi-layer bottle.

However, the cost would be significantly higher for single-layer bottles. The concentration of pigment would have to be used throughout the layer, requiring more pigment and resulting in a higher cost. That would limit creativity, especially with very high-cost pigments.

#### What's on the horizon

In addition to being able to create new looks by varying the layers, pigments are emerging that



The frosted look comes to plastic bottles like these produced with pigments from M.A. Hanna.

The pigments create the frosted look, but they do not create the tactile effect commonly associated with frosted bottles—that would have to come from the mold used to make a bottle.

54

away these materials.

■ Second, the cushioning didn't work that well anyway. Some cartons were "dinged" in transit. On occasion, the media itself was damaged.

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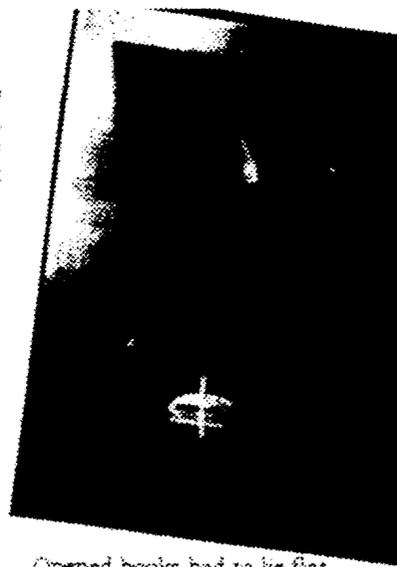
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### Where to go for more information.

Design services. For more information about Fish Inc., contact Kristina Pothier at 617-439-3400 or e-mail [kristina\\_pothier@fish.com](mailto:kristina_pothier@fish.com)

# COLOR FORECASTS SEE NEED FOR SPECIAL EFFECTS

The ability to create a range of special effects in plastic bottles comes at just the right time, according to predictions of leading color forecasters.

Two of the leading color groups—the International Colour Authority and the Color Marketing Group—both see greater roles for visual effects and textures in this new decade.

The International Colour Authority forecasts trends for packaging in several product categories. For personal care packaging, it sees a role for special effects as a key in signifying the quality or the excitement of the product inside the package.

Yet, it cautions that special effects need to be weighed against consumer demands for a natural and honest appearance in packaging. The ability to balance unexpected opposites will be a key in attracting the consumer, according to forecasts.

Here are some of techniques that will work in that context for personal care packaging.

Silver and gold have been the colors that brought in the new Millennium. They will give way to bronze, brass and copper. High gloss will decline and the emphasis will shift toward dull oxide. The group also sees more use of mica pigments, which create the pearlescent appearance for the anodized aluminum look.

The International Colour Authority

says that for personal care products, packaging has become an extension of the product itself.

For general packaging, the International Colour Authority sees the color of the product itself and translucent packages combining to create a total effect, one that emphasizes depth.

The plastic surface itself will become three-dimensional through deep luster and lacquer effects.

The use of tinted translucent or transparent packages with a colored product may help address another trend of the decade of the '0s—the need to address individualism.

The Color Marketing Group also addresses the issue of individualism, saying that people increasingly want to customize or personalize an object or their environment. The color palette, therefore, must be flexible and versatile.

One way to create a range of effects is to use a transparent or translucent container in a single color for an entire product line while varying the color of the product inside. That tactic can create striking—and cost-effective—color differences between varieties in a line, especially when coupled with a labeling strategy that emphasizes the brand and cohesiveness of the line itself.

The Color Marketing Group also sees a role for texture and finish, noting,

"Visual and actual texture, pattern and finishes increase the perception of quality."

The International Colour Authority sees an increasing importance for what it calls "kinetic" effects. In plastic, those effects incorporate high luster blue and purple to represent confidence and authority. Blue gives a cool refreshing quality, while fluorescent yellow, red, purple and electric blue can enhance the perception of potency.

Millennium heat wave colors include extremes of the spectrum—infrared and ultra violet. The International Colour Authority says indigo and violet represent the high frequency acceleration of the 21st century.

But it isn't all high-intensity color. White-on-white in its purest form shares a retrospective vision of the 21st century. And satin or light spark finishes can elevate a white plastic and give it more noble qualities.

## Where to go for more information...

The following sources for this article can provide more information on color in plastic bottles and caps.

► **Color Forecasts in Plastic Chip Form.** This binder is a joint effort between the International Colour Authority, Clariant and Merck Pigments. At Clariant, contact Theresa O'Neill at 410.770.4356 or e-mail Theresa.O'Neill@clariant.com

CONTINUED FROM PREVIOUS PAGE  
hifts between three colors—  
rown, green and violet.

The caveat to the potential of  
nese colorants—they are very,  
ery expensive.

**Sparkle pigments.** While  
earlescent is having a major  
resence in plastic bottles, some  
anufacturers are developing  
olographic flakes that produce  
nore of a sparkle than a luster.

**Tints for PET.** PET is one  
of the fastest growing plas-



Among the color challenges facing marketers is achieving a comparable look with different materials. Packaging for Pantene illustrates this with bottles and caps of different materials produced by different methods.

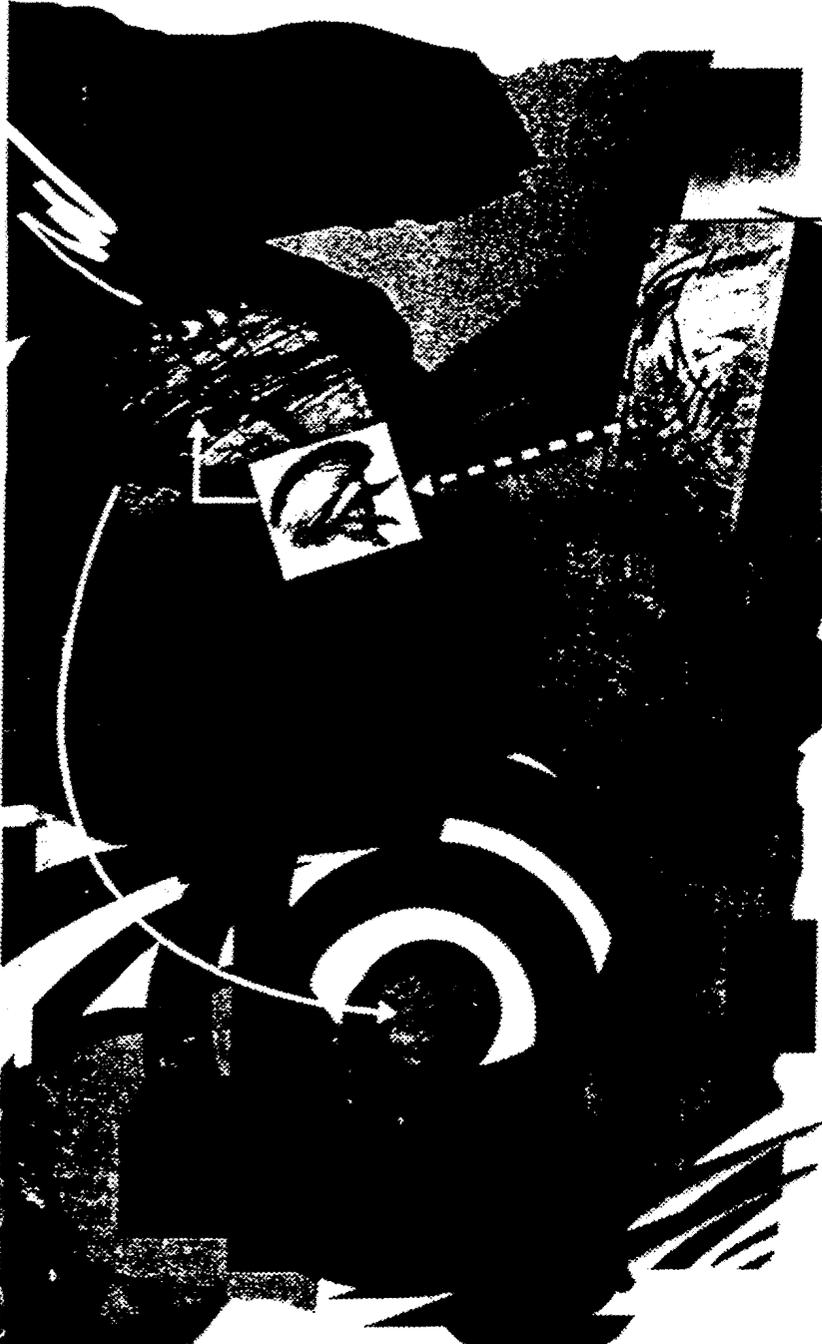
tics for bottles.  
his high gloss and transparency  
offer shelf impact. Transparent pig-  
ments are beginning to offer an  
opportunity for an explosion of  
color in PET bottles.

"Soft-touch" finishes." The use of  
"soft-touch" resins creates shelf  
impact (CONTINUED ON PAGE 33)

# COLOR—THE INSTANT, EMOTIONAL CONNECTION WITH CONSUMERS

*If it is an impulse buy, 80 percent of the decision may be based on color.*

*These five steps help you choose and use the right colors.* BY TOM O'NEILL



Color is among the most powerful selling tools, and the way it is used on a package can determine a brand's success or failure.

Color experts say the human eye distinguishes between 10,000 colors (times myriad tints, saturations and degrees of brightness). With a palette that extensive, the task of selecting the right color for your brand becomes daunting and bewildering.

Often the temptation is to go with a personal preference, or even worse, an arbitrary and uninformed committee decision. That could be a big mistake, especially when your product could be bought on impulse when up to 80 percent of the buying decision is made on color.

Here are five guidelines to help you through the color decision process.

## 1. Do your homework.

Color is so complex that it is better to do your homework rather than rely on what may seem to be "common sense."

The first place to start is to analyze the product's basic appeal. Do that by defining the product: What is it? What is it composed of? How does it work? And what is its appeal to consumers?

That evaluation should answer this question: "Why would consumers buy this product rather than another in the same class?"

The answer may suggest colors that support the product's basic appeal. Are consumers expecting purity, cleanliness, fun or health? Each suggests different color choices.

Another important bit of homework: Take a hard look at all competition—primary, secondary and peripheral.

One way of doing that is to get samples of every package in the product category. What are the category's characteristics? Today, they range from a dominant category color (such as body washes) to a riot of colors (motor oil or dry cereals).

The category's characteristics may suggest that you want to "fit in," a strategy that can work for "me too" or retailer brands. In other instances, standing out from the crowd may have an advantage.

Another important piece of homework: Study colors in other industries—especially those high-impact, image-driven categories like automobiles, home furnishings, appliances and fashion.

Colors are translating much more

secondary graphics and short-term promotional elements such as violators and point-of-purchase displays.

Knowing what's hot also can help with line extension communications where color coding may signal variations such as flavors, low-fat, sugar-free, etc.

## 2. Know your psycho-chromatics.

There is a shortage of sources for serious information on color psychology, and often color decisions are made using commonly accepted reasoning: Red is blatant, loud and extroverted. Pink is delicate, gentle. Blues and greens are soothing, quiet, cool, introverted.

However, these colors can be modulated. Pink may be gentle, but hot pink is sexy. Red may be loud and overbearing, but add blue to it and it becomes imperial.

To get maximum marketing

"loud" colors. Red, for example, may add impact, but it may not add value.

Here's an example: Affluent consumers prefer darker, richer colors. If you know your customers, it is much easier to choose a palette that is relevant to them.

Sometimes choosing the palette presents a conflict. A household cleaner, for example, may be positioned as "industrial strength." An identity expressed in a heavy, black stencil type on a bright orange may communicate "industrial strength," but the colors may not be relevant to a segment of young, professional women.

## 3. Sustain color's power.

Once you have committed to a color palette that expresses your product's personality (positioning) and your target's preferences (psy-

*Color must do more than have an impact on consumers; it should open access to consumers.*

chographic relevance), you need to sustain it.

Diluting the colors with too many extensions or flankers could be a major marketing misfire. The effort to communicate differences under the umbrella brand may jeopardize the integrity and impact of the brand itself. *CONTINUED ON PAGE 71*

rapidly from these industries into packaging. Sky blue, for example, has been a dominant color in fashion and it is having a major bump in beverage packaging.

But you can't base the core elements of brand identity on a mere trend. However, knowing what's hot and what's not will help with sec-

ondary graphics and short-term promotional elements such as violators and point-of-purchase displays.

Knowing what's hot also can help with line extension communications where color coding may signal variations such as flavors, low-fat, sugar-free, etc.

# COLOR PERSONALITIES

When it comes to color, consumers can be divided into three broad categories, says the Cooper Marketing Group, a market research company specializing in color.

Its psychographic survey data draws a connection between reactions to product colors and characteristics like age, sex, income and taste in furniture.

### Color-forward

This consumer likes to be the first to

try a "new" color and is willing to spend more for a product in a fashionable color. They are:

- Women under 30 or over 50, or men under 30
- City dwellers
- Impulse buyers
- Making less than \$35,000 a year
- Buyers of contemporary furniture

### Color-prudent

This consumer will buy a "new" color only after seeing friends try it, and often puts quality ahead of color when choosing products. They are:

- Men or women between 30 and 50
- Suburban

- Careful shoppers
- Making more than \$50,000 a year
- Buyers of contemporary or traditional home furnishings

### Color-loyal

This consumer replaces a product with another of the same color and prefers safe colors like blue or gray to fashionable colors. They are:

- Men over 60
- People who dislike shopping
- Anywhere on the income spectrum
- Buyers of casual country or traditional home furnishings

Source: Cooper Marketing

Color coding different flavors or product types, for example, while consumer-friendly, should not overwhelm the brand's core personality.

Multiple identities also are a potential trap. Brands can be burdened with too many supporting identities and too many colors. Those elements include corporate endorsements, sub brands, sub-brands for extensions, etc., each with their own color specifications. The ensuing chromatic cacophony may

## Always be open to the possibility of color modifications, or even a complete redesign.

completely erode, or at best clash with, the brand's color identity.

The best way to avoid this is to prioritize the communication units carefully, making certain that the brand identity remains dominant and the other identities do not overwhelm the brand's aesthetic. In many cases this demands that sub-brands be expressed in complementary colors.

### 4. Manage your color production.

Choosing the right combination of colors works only if consumers see those colors as you meant them to be seen.

Execution becomes critical, especially when an identifying color has to be true on different package forms—a bottle along with its label and cap, for example. Different surfaces, different textures and displays under different lighting conditions can change color.

For example, a specific red printed on a can will not appear the same if it is printed on a paper-board carton used to hold the can.

For the brand identity to appear consistent, it may be necessary to alter color formulas so that they appear to be the same on different surfaces.

One way of doing that is to institute a specific color management system in which a brand's specific colors are matched on sample chips. Organizations that can help develop color management systems include Color Communications Inc., Chicago.

Such a management system

## Where to go for more information...

needs to be developed for every type of material on which you might print. And it may have to cross national borders if your brand is packaged in components made in

different countries by different processes.

A color management system can make certain that all your marketing tools—bottles, cartons, point-of-purchase displays, banners, truck liveries—are consistent whether printed, painted, sprayed or molded.

The color management exercise may require that you monitor your retail channels and adjust color formula changes for different conditions.

Keeping color on target also means monitoring suppliers. Establish rigid tolerances and make certain that suppliers stick to them.

If colors vary, consumers may perceive less value in the brand—packaging that is not tightly controlled for uniform appearance may look "broken" to the consumer.

### 5. Keep color on the front burner.

Many marketers feel that once an effective identity palette is chosen and suppliers are all given precise standards documentation, all will be well.

Remember the fickle consumer. Today's perfect brand expression may not be tomorrow's. Markets change, consumer preferences change, competition changes, and retail environments change.

Original marketing goals may even change. Always be open to the possibility of color modifications, or even a complete redesign. While the core identity may remain constant, color alterations in trade dress may be necessary every few years.

At one time package design was thought to be good for about six

years. No longer. Marketing in our increasingly competitive global economy is moving with increasing speed. Fortunately, color communicates just as fast. ■

The author, Tom O'Neill, has written extensively on brand and corporate identity topics for major design firms. This article was based on information from Eric Johnson and Jean Luck Sr. of Color Communications Inc. and the Institute for Color Research.

## SIX-COLOR SYSTEM EXTENDS OPTIONS

Just in case you don't have enough color options now, there's a color specification system that extends your choices even further.

Called the Hexachrome system, it uses six basic colors rather than the four that make up the most common printing processes. It was developed by Pantone Corp.

Hexachrome adds a green and an orange to the ink system. The additional colors create hues and tints that can differentiate brand packaging from that produced by the standard four-color process. According to Pantone, the system "virtually eliminates" the "dump piles" to achieve custom colors.

The system offers additional color options, but it can add complication to package production. One production coordinator at a design firm notes that six-color proofing systems aren't readily available, making it more difficult to check materials as they are being printed.

## Where to go for more information

► The Hexachrome process—  
At Pantone, contact Jay deSibour:  
201/535-5500 or e-mail:  
Ldesibour@pantone.com



*Point-of-purchase displays for L'Oréal echo the shape and color of the primary packages, reinforcing the impact of the display.*

## SEVEN STEPS TO INTEGRATE PACKAGING AND TEMPORARY P-O-P DISPLAYS

*You have the product, the package and the budget for point-of-purchase.*

*How can you pull them together for brand impact?*

Temporary point-of-purchase (p-o-p) displays give brand marketers a unique opportunity to grab consumers' attention at the moment of the purchase decision. But to generate the most impact, temporary displays—and the packages they hold—must complement each other.

"The more that the package and the display work in tandem, the better sales will be," says Holly Roper, Retail Marketing Manager for Promo Edge, a division of Menasha Corp.

The following seven steps are a guide for getting the most from the package-plus-display combination, with attention to the needs

of the marketer, the retailer and the consumer.

### **Step one: Identify the mission**

The first step is to answer the question, "Why do we need a temporary display?"

The query probes the rationale for moving packages from a place on the permanent shelf to a separate display. The answer sets the tone for all design and integration decisions that come later.

Answers may include: to build brand awareness, to launch a new product or a line extension or to improve sell-through of an existing product by motivating consumers to change their buying behavior.

In any case, the design of the display and packaging must reinforce the product's brand identity.

"The brand is where it starts," says Jamie Botter, Principal and Director of Brand Development at Bolt, a Charlotte, N.C.-based product and brand development firm.

"There's a core set of brand images that are not campaign driven. They are the essence of the brand. Once you establish the brand imagery, it transcends to point-of-purchase materials and possibly packaging," he adds. The imagery may be a smiling child, in the case of a baby-food brand, or a graphic ele- CONTINUED ON PAGE 21

ent like the Coca-Cola script. If you don't celebrate the architecture of the brand, the product could anybody's," Bolter says.

#### Step two: Do the research

The next step is to research retailer and consumer needs, looking at how these needs impact the product, the package and the display. Research into how competitors use promotions, packaging and displays also can be helpful. Techniques such as surveys and focus groups reveal what retailers need the display to do in-store, both structurally and to meet merchandising goals. Consumer research reveals how much consumers know about the product or category. This is extremely useful when formulating messages for the display and the package, both individually and together. Research should be involved in all marketing efforts, because it saves the guesswork. It keeps us informed. Much as we may think we

understand what goes on in the consumer's mind, we don't," says Bob Robbins, Chief Operating Officer with BrandEquity Int'l, a Newton, Mass.-based firm that specializes in brand building.

In addition to conducting research up front, marketers benefit from conducting research during the display's development and deployment cycle to show if the effort is on track.

#### Step three: Integrate the elements

The packaging and display together need to deliver a coordinated marketing message, brand imagery and promotional information.

Two recent displays from L'Oréal demonstrate the point. In both cases, the corrugated point-of-purchase displays carried similar colors and graphics as the bottles they held and mirrored the bottle shape.

The temporary display for L'Oréal Vita Vive hair care products helped launch the products as a line extension in Canada.

The display echoed the Vita Vive bottle's curvy closure and high, round shoulders. Messages on the display, which highlighted the product's vitamins, reinforced Vita Vive's image as scientifically beneficial to hair.

The display for L'Oréal Kids helped launch a new styling gel, conditioner and shampoo, also in Canada. The display mimics the shape of the L'Oréal Kids bottle. Much of the equity in L'Oréal Kids lies in the fish-shaped bottle; the display leverages that equity.

Both were produced by Montreal-based Point One Displays.

In addition to coordinating with each other, the package and display should be integrated with the full range of marketing media. The same messages, look and feel should permeate point-of-purchase materials, packaging, direct mail, coupons, contests, promotions and advertising.

"The overall effectiveness of building brand is greatly increased when the packaging and display advertising are integrated," says Dick Blau, President of the Point of Purchase Advertising Institute, Washington, D.C. "In-store advertising represents the last three feet of the marketing plan."

#### Step four: Address retailer needs

Displays can't bring the package to consumers if retailers won't put dis-

plays on the floor. To encourage this, marketers must know stores' merchandising and sales needs.

The display and packaging should enhance the store environment, working effectively within the square footage and other retailer space confines.

The retailer may have graphics standards or limitations on the display's footprint. They may want point-of-purchase materials to show the retailer's brand name and mark. The type of retail environment dictates the display mode to some extent.

A traditional grocery store, for example, may prefer small temporary displays because of space constraints. A warehouse store—in contrast—may create displays from the secondary packaging, using cut cases or pallet loads of cases with the wrap removed.

#### Step five: Communicate effectively

Communicating the appropriate marketing messages to consumers is a key issue.

In the research step, marketers learn just how much the consumer knows about the product and product category. This research indicates how educational point-of-purchase communications need to be.

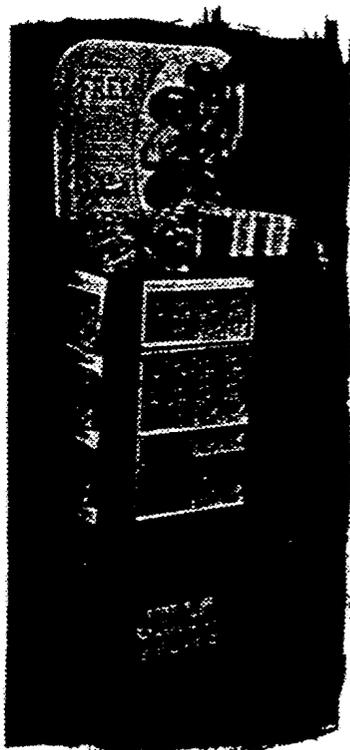
Complicated products like software programs often require consumer education. The marketer may use an interactive approach that blurs the line between temporary and permanent display.

This kind of display could take the form of an interactive kiosk that leads the consumer through a product demo. Here's where package and p-o-p design complement each other. For complicated products such as these, copy on the package should complement the p-o-p demo.

For mature products, neither the package nor the display need to educate consumers. For many food, beverages, cosmetics and toiletries, simple messages are best.

For these products, "The message should be concise, clear and communicated on the point-of-purchase materials. If the message is 'buy now and save,' the display should say, 'buy now and save.' Don't overdo it. Talk simply and to the point, and keep it to five words or less. Don't get too wordy because

CONTINUED ON PAGE 19



point-of-purchase unit for Jell-O adapts different seasonal promotions that offer no molds. The header panel changes, reading on the promotion. Produced by and Paperboard and Packaging Inc., the display has packages stacked on three sides to add visual impact.

CONTINUED FROM PAGE 18

nobody's going to read it. You have two seconds to get your point across," says Promo Edge's Roper.

She adds that it is essential to show the product's price on the display.

Research by her company shows consumers have less than a 50 percent chance of buying the product if they can't find a price on the display.

#### Step six: Make it functional

Structurally, the display must be strong enough to hold the packages and stable enough to stand up no matter how fully it is stocked. In addition, the display should be easy for store personnel to put together and to restock.

To ensure structural strength and stability for the L'Oréal Vita Vive display, with its top-heavy bottles, vacuum-formed trays were included to hold the product.

The display met functional requirements for ease of setup and stocking, as well. The bottles and display arrived at the retailer in one shipper. Store clerks set up the display by mounting a header board, then immediately stocked the display.

A functional need that marketers sometimes overlook is the physical ease of removing packages from the display and putting them back.

"Make sure the display is shop-pable—that the consumer can get the product out," says Jack Briggs, Vice President of the St. Paul, Minn.-based Display Division of Smyth Cos. Inc. "It's very common for consumers to



Here's one marketing tactic to get a bread in as many areas of a store as possible. This roll-away point-of-purchase unit from Smyth Cos. facilitates that strategy by letting store personnel easily move the display.

take product out of the display, read the package and try to put it back in. If they can't, they put it on the floor or on the wrong shelf, and store managers hate that."

In addition, Briggs says shippers for the display and product must offer protection during shipment so they arrive at the stores in "appropriate merchandising shape, not damaged, scuffed or ruined."

#### Step seven: Build in flexibility

Flexibility, like functionality, is desirable in a temporary display. Retailers like displays that can be used in multiple areas of the store or for serial promotions.

With promotional flexibility in mind, Kraft General Foods developed a temporary display for Jell-O products.

The promotion, which runs during five holiday periods per year, encourages quantity purchases by offering a free Jell-O mold as a gift.

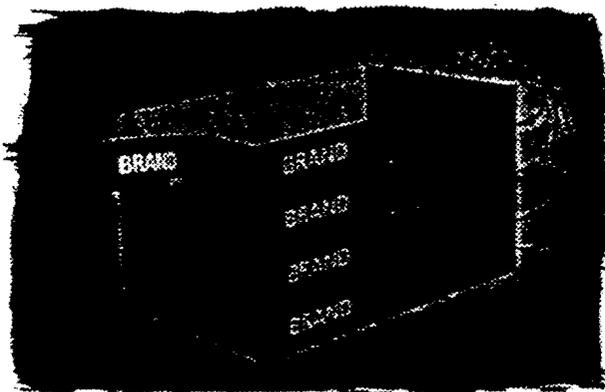
The three-level, vertical Jell-O display has three facing billboards and a promotional header billboard. To redecorate the display for each promotion, a store employee removes the header panel and replaces it with a one for the upcoming holiday

Created by Inland Paperboard and Packaging Inc., Indianapolis, the display can hold three- and/or six-ounce Jell-O packages plus the Jell-O molds.

Some marketers are opting for movable temporary displays. A version from Smyth Cos. is made of corrugated and has wheels on the bottom so store clerks can move it to different sections of the store. This gives the marketer and retailer flexibility for display placement.

For example, a peanut butter marketer running a promotion with a bread marketer could stock the wheeled display with peanut butter jars, then roll the display to the bread aisle for the duration of the promotion.

The adaptable Smyth and Jell-O displays show how marketers and retailers can extract the most from temporary point-of-purchase advertising. ■



The tear-away case concept addresses display needs in warehouse stores and similar outlets. It carries graphics to its full height, creating a display. Yet, it works even as stock is depleted. Store personnel tear away pre-scored strips, revealing more stock while the case still shows graphics. The concept comes from Promo Edge.

#### Where to go for more information...

For more information, contact Inland Paperboard and Packaging, 317/879-5700, or [spjortew@iccnct.com](mailto:spjortew@iccnct.com)

# TOP 10 IDEAS FOR GREAT FOOD PACKAGING

Grab attention, stand out, differentiate your brand and leverage color.

Those keys help the package improve sales. BY J. B. JARMAN JR.



*Texaco Coffee creatively stands out in the category by using a box with a bag inside. It gives the small player a creative niche amid flexible pouches with pressure-sensitive labels on them.*

king. Ad dollars dwarf dollars parceled off for package design. Some hold to the theory that reaching consumers with an advertising message overrides any need for point-of-sale appeal.

Yet, shelves abound with packages that dazzle and sell themselves right into shoppers' carts. These successes shatter the myth that advertising is always the king.

Done right, packaging can be the primary communications vehicle that cuts through the barrage of competitors' new products and spin-offs.

Here are 10 ideas that can put the competitive edge in your hands. They are rooted in time-proven principles that collectively deliver a graphic design knockout punch for food packaging.

## Branding, branding, branding

Yes, everyone knows that this is the key. But how well are you using it? Whether for frozen, refrigerated or dry foods, packaging must have a common denominator that announces

CONTINUED ON PAGE 13

Package design either grabs the consumer in the supermarket aisle or it does not.

How well it grabs the consumer goes a long way in determining how fat the marketer's bottom line is. And increasingly, marketers have to look at their packaging design more frequently to protect their bottom lines.

- Consumer lifestyles change, likes and dislikes change, and buying habits change. Even the giants have to freshen packages or see market share erode.

- Branding may sweep aside all other considerations in package design, especially for items from food giants.

- Upstart competitors take bites here and there out of the big customer pie.

- The sheer volume of new products shouts for, and increasingly gets, coveted shelf space, mandating that major companies re-think entrenched package designs.

*Chung's leverages color to stand out in the refrigerated section. Most competitors are in yellow trays with a printed wrap, while Chung's uses a printed carton to achieve a saignée look.*

Who would have thought that an ethnic item like picante sauce would replace ketchup as the No. 1 condiment in the United States? Or that tortilla chips would virtually shove traditional potato chips off the racks?

The point is this: Packaged food profits zoom and skid for more reasons than most marketers care to remember. Yet, all too often, the package is cast as neither a scapegoat nor seen as a springboard to drive sales upward.

"Great food packaging" and "higher sales and profits" aren't usually thought of as twins, even fraternal.

Why not?

Because advertising is seen as



CONTINUED FROM PAGE 11

to shoppers with all the subtlety of a bullhorn: "This is Brand A."

They must know it from their shopping experience, associate it with quality and/or enjoyment, and each time recognize it immediately.

Branding breeds loyalty as long as the product meets expectations and a new feisty competitor is not cutting into the appeal.

Conversely, being all over the page with different designs for different foods within a product line only confuses consumers. It can create the critical moment of indecision that makes shoppers look at—and buy—other choices.

### Get the consumer's immediate attention

As an offshoot of branding, you must create packaging excitement. In seconds—or split seconds—you must catch the consumer's eye with everything from vibrant colors, tantalizing food photography, and sophisticated graphics down to the way your package is folded, molded or presented.

That applies to shoppers with detailed lists for meal planning. It applies to the typically male exploits of running up and down aisles impulse shopping.

It is no less important to take a fresh look at, for example, how leading frozen cuisine packaging sells to one type of shopper than to another.

*Villa Cariss flavored olive oil makes a creative presentation with a tall, thin bottle. But the Old World-style label makes it stand out from the competition in the flavored olive oil category.*



### Creatively stand out from competitors in the same category

Shelf-space wars are fierce, yet, imitation runs as rampant in food packaging as in movie sequels. The idea is that color schemes that work for the best-known ice cream maker will rub off their magic on your brand.

Reality is harsher.

Who are the major coffee makers and how do their packages look? Their branding commands consumers' attention with a sea of red and blue covering the shelves. While it can be profitable to steal ideas from competitors, outright imitation can be deadly in the aisles.

Texana Coffee is a small player that set itself apart by packaging whole bean coffee inside specially designed boxes. The beans are inside sealed bags inside the box, instead of being in the more common sealed bags with a flexo-printed sticker slapped on the outside.

Consumers could hardly help but



favorably notice the boxes and sales have soared. Marketers at the fabled King Ranch were impressed enough to private label this coffee in their upscale catalog.

### Differentiation means not running with the pack

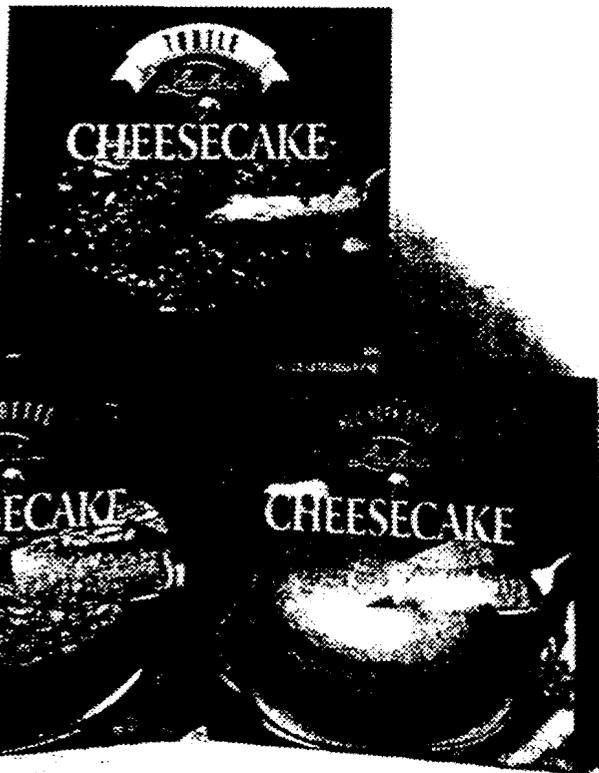
Differentiation, a key to the best package design, means not just setting your product apart from competitors. It also means not jumping en masse on the latest trend.

Be solution-focused on fresh ideas that are best created, incubated and rolled out by having fun in the package design process.

A good example is the nation's largest egg roll producer, Chung's. It had a product line that competes in the supermarket's refrigerated sections that typically feature little color.

Since most of its competitors use yellow trays with printed plastic wrap, Chung's turned the table both in color presentation and the packaging's physical appearance.

Switching to black trays, the designer punched it up with brighter, more striking colors—on a die-cut sleeve. CONTINUED ON PAGE 14



*Lawler's Cheesecake minimizes clutter on a package and shows how the primary message can dominate. The appetite appeal is high even though it carries "mandated" elements, such as "Stone frozen," "There is refrigeration," along with the net weight.*

At the checkout registers, Chung's new packaging was a huge success.

## 5 Know color theory and how color works

Color is the most powerful packaging ingredient in the creative mix. Get inside your sales message as it relates to your product and, within the boundaries of not skewing your food's inherent appeal, take your packaging color to new dimensions.

That includes resisting the temptation to capture—on a box of oatmeal—the vivid purples and light greens expressed on canvas by a newly discovered impressionist artist.

Know that certain colors have a specific impact on buying. Blue is most calming, and green represents nature. In recent years, black makes an elegant upscale statement, particularly in combination with red and/or yellow.

From a different perspective, colors can have a positive or negative buying effect. Warm colors, such as reds, oranges and golden yellows, come toward you and cool colors recede.

## 6 Eliminate clutter and maximize "shelf pop"

Package designers have to deal with consumer regulations and a laundry-list of product information and mandated information that add clutter.

Whether dealing with "serving suggestions," "keep frozen," "net weight" or myriad other verbiage, clutter can and should be minimized on the package.

With color, photography/art and the unique use of typography, make the food's appeal prominent and disguise the required secondary design elements within the primary ones.

In effect, make the food and its name "pop" and find a comfortable background home for the other information.

## 7 Make packaging fit your company's image or create a new one

If you miss the mark in presenting your company's image, you will rarely hit the bull's-eye at point-of-purchase.

That applies not just to industry

icons made famous in national advertising campaigns, but to packaged foods with a much shorter history and lower-profile name recognition.

Once you have established an image, that is who you are to consumers.

Know your target market and key demographics, not the least of which are age and buying preferences.

Change is something that many readily jump at, others can accept, and some will never like unless it still fits your image.

If maintaining your image is only proving how well you captain a sinking ship, create a new image and leave no reminders of the old behind. Mix and mingle does not work with old and new images.

## 8 Make product presentation itself creative

By one estimate, you can fold a box 9,000-plus ways. Consumers are still waiting for the other 8,000 or so to appear on shelves.

Why? Food marketing professionals are well aware of all the complexities involved in packaging their specific foods per se and how they stack when transported and stocked.

So, it's not easy—or even practical—to venture into exotic territory with box shapes and sizes. But do maximize your approach to all packaging materials. If you package in glass, look for companies that already have molds in unusual shapes.

For example, Villa Carina, a flavored olive oil producer, needed an identity. Since olive oil is light-sensitive, a thin, tall black glass bottle was found and chosen.

After researching what competitors in the category were doing, it became obvious they had all taken the same path with a trendy, artsy, almost bath oil look. To stand out from the clutter, the designer developed labels with an Italian Old World look and style. The result was an elegant "seller."

## 9 Update packaging regularly

If you market a "must-have" product and consistently register high sales, you're still not immune to shifting consumer preferences and whims.

Reality strongly indicates that only major, well-established brands should not necessarily tinker with updating

packaging. For all other food packagers, the entire product line should be updated every two to three years.

Why, aside from visual appeal? Because everything used in the original design, shoot and printing—from props to printing plates—looks dated in the bright lights of changed design styles.

Given this compressed cycle, seize the opportunity to do more than change a typeface or move a photo an inch over.

Stretch your mind when you are looking at change. You can think plastic to capitalize on environmental concerns and to take advantage of new technologies. And look at new printing techniques. The digital printing era has opened an entirely new design world.

## 10 Never make price point too high by overdesigning

With points 1 through 9 in mind, see where you can take your package design and packaged food sales. At every turn, think outside the box literally and figuratively. But remember to always balance design with packaging costs.

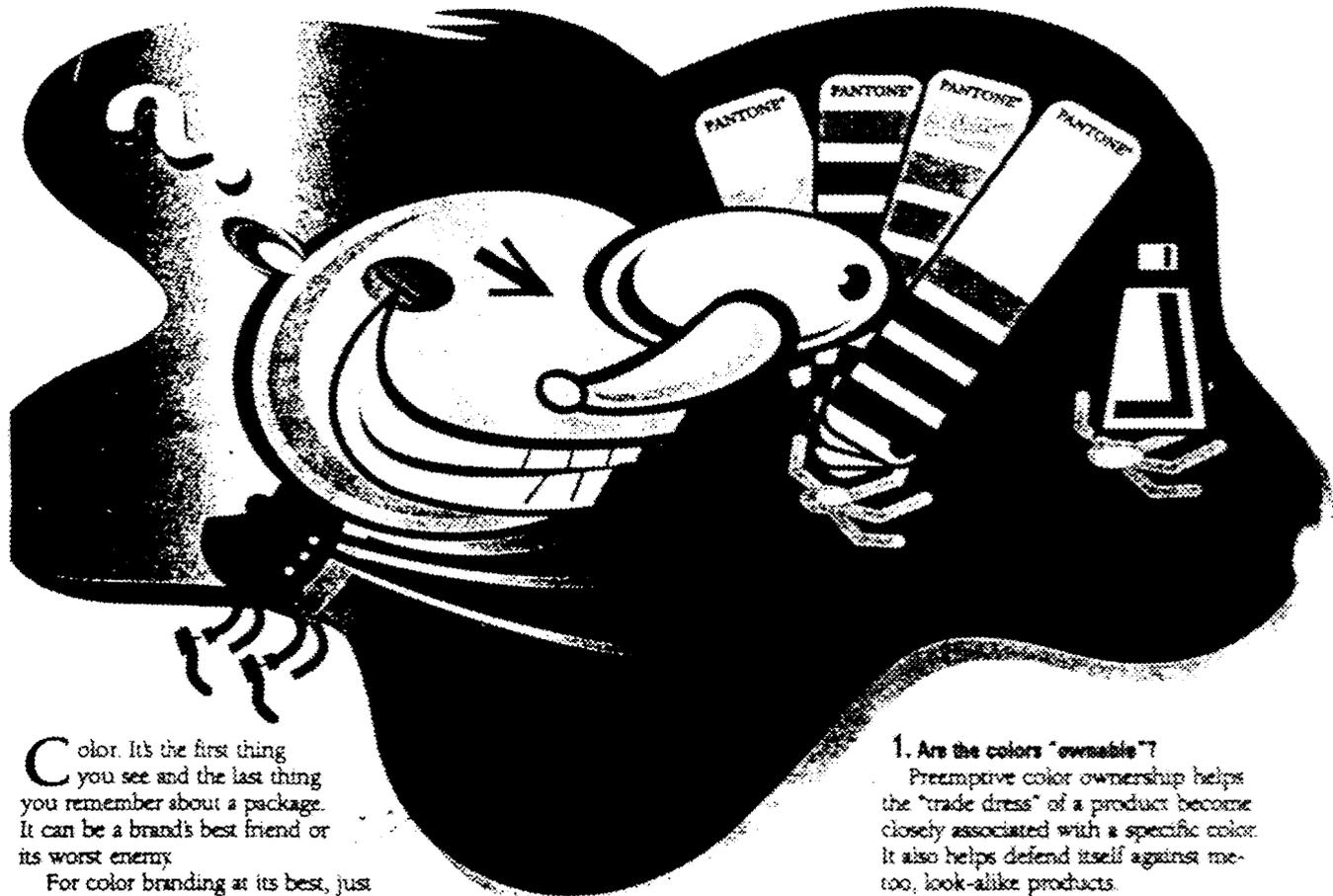
Great food packaging is not a mirage or a lofty goal attained by only a few with deep pockets. It's within your reach and can it ever pay off. ■



The author, J. B. Jarman Jr. (jb@innovatedesign.com), is President of Houston-based Innovate Design & Advertising (www.innovatedesign.com), widely recognized for package design, corporate identity programs, Web design and full-service advertising.

# HOW COLOR CAN MAKE—OR BREAK—A BRAND

Win with color by finding an “ownable” hue, examining how it works with different media and judging its impact at the Point-of-Sale. BY PAUL R. SENSBACH, PH.D.



**C**olor. It's the first thing you see and the last thing you remember about a package. It can be a brand's best friend or its worst enemy.

For color branding at its best, just look at Coke's classic red can, McDonald's golden arches and Tide's trademark orange and yellow concentric circles. These leading brands are instantly recognized around the world by the colors that they own, even if you can't read the language on the package or sign.

Unfortunately, when color is misused or selected arbitrarily, the results can be disastrous.

Two examples: Kraft's frozen macaroni and cheese packaging in the mid-1980s. More currently, in the personal skin care section where the same blue and white product packaging makes it difficult to tell one brand from another. (See the related items for more details.)

Had the brand managers in those cases chosen their colors more carefully, they would have saved their companies millions of marketing dollars and hours of lost time.

Such catastrophes do not have to happen. To build a successful brand—and avoid disaster—ask yourself these four questions before selecting your packaging colors:

*Using the color wrong can wreak havoc on a brand's identity. Each of these brands used white as the key color and blue to target the brand, product category and benefits. Sitting side by side on store shelves, each suffers from lack of differentiation.*

## 1. Are the colors “ownable”?

Preemptive color ownership helps the “trade dress” of a product become closely associated with a specific color. It also helps defend itself against me-too, look-alike products.

Ideally, the trade dress should remain constant so it becomes ingrained in the minds of consumers even when the product shapes, forms and formulas change.





An example of color branding at its best. Whether purchasing Crayola's crayons, Doodling Washable or Techno Bright markers, the brand is easy to spot in its signature bright yellow-and-green box.

For example, everyone's familiar with Colgate toothpaste's classic red and white logo, even though the product design has been updated over the life of the brand.

Other instantly recognizable brands easily identified by color are Campbell's red-and-white soup can; Ivory bar soap's 100-year-old blue-and-white package, Hershey Chocolate's brown-and-silver wrapping; and Philadelphia cream cheese's memorable silver packaging.

Even when specific colors are employed across a wide range of products and sizes, they should reinforce brand recognition.

Crayola is a case in point. Whether you purchase Crayola's crayons, Doodling Washable or Techno Bright markers, the product is still easy to find in its signature bright yellow-and-green box.

Can the colors be applied across various media or treatments?

A brand's colors must be consistent in all applications, whether the product is displayed in a retail environment, on signage, on a building, used in direct mail or on the package itself.

This "redundant cuing," where the same colors of a brand are seen in several different venues, sets up a powerful subconscious message in consumers' minds, which is reinforced with each application.

Consider how the judicious, repeated use of color and well-designed graphics have made Kentucky Fried Chicken's red-and-white tub, British Petroleum's green-and-yellow insignia, and Shell Oil's yellow shield known throughout the

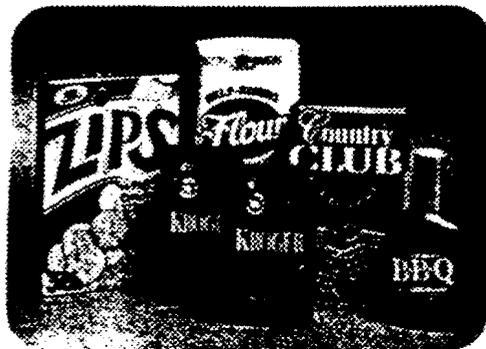
*Target usually goes with a strong, image-driven design for its packaging. But the retailer gave up that competitive advantage when it chose to emulate closely Noxzema brand's jar shape and overall color.*

world, no matter where or on what medium these symbols are displayed.

### 3. Do the colors work at the Point-of-Sale?

Far too often, package design decisions, including color palette studies, are made in a conference room or environment other than one approximating real-life shelf conditions. That practice can be terribly misleading.

Had the color decisions been made in the actual selling environment, then perhaps the very tastefully designed



*Kroger is working category by category to create its own branded packaging that stands out, with an image on par with the strongest manufacturers' brands.*

and executed dark green-and-brown frozen food packages, which tend to get lost in the poorly lit, product-cluttered freezer cases of today's supermarkets, might never have been produced.

### 4. Can you maintain color fidelity across different substrates and printing methods?

Particularly in today's global economy, a line of products may be packaged and printed on different materials and in different ways. In one market, graphics may be printed offset, while in another market it

CONTINUED ON PAGE 81

## COLOR MISTAKE

Getting the color wrong can wreak havoc on a brand's equity as Kraft Foods learned to their chagrin in the mid-1990s. When research revealed that consumers had trouble finding sought-after Kraft products, the reason turned out to be choice of color.

In a major packaging misstep, sales of Kraft frozen macaroni and cheese plummeted when the product was introduced in an elegant brown box with skillfully crafted typography—rather than the recognizable blue package that had helped the shelf-stable product cement a place as one of America's best-selling food products.

Sales rose again when the blue was restored, becoming a standard color system that Kraft has kept intact after nearly 50 years.

The red, white and blue logo may not be a fashion statement, but it permits Kraft brands to be identified quickly across multiple categories, in every retail distribution point in the United States.

A more recent example of a color misstep is illustrated in the skin care category.

Five different skin care brands—Keri, Neutrogena, Beierdorf, Warner Lambert and Jergens—all used white as the key color for their packaging and blue to target the brand, product category and benefits.

Each package communicates well in isolation. But when they are sitting side by side on a store shelf, the individual brands suffer from a lack of differentiation and don't aggressively compete for attention.



## AGGRESSIVE USE OF COLOR IN RETAILER BRANDS

Retailer brands are now receiving significant budgets and attention.

Mass merchandisers are shifting from cloning category leaders to establishing a powerful independent base of their own. They are using hard-hitting, competitive packaging, and they are using color aggressively.

The Kroger Co. is among the leaders in employing this strategy. They are working category-by-category to create packaging that stands on its own. The packaging creates an image on par with the strongest manufacturers' brands.

Another success story is Wal-Mart's Popular Mechanics tools. In a fragmented, cluttered selling environment, these products move well against the national brands on the strength of their packaging.

A billboard of red and black colors enables the customer to locate the Popular Mechanics brand easily. Copy is straightforward and the blister pack helps identify each individual product.

On the other hand, when retailers eschew differentiation and image-building for their brands and opt for imitation, they lose their audience.

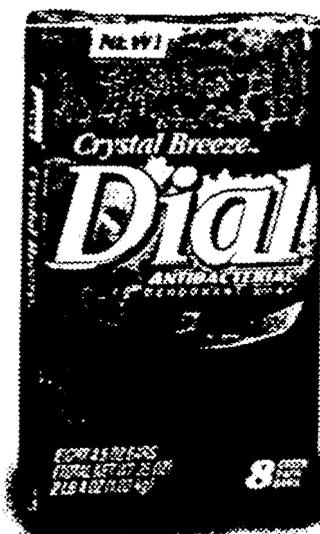
Case in point: When Target stores chose to emulate closely the Noxzema brand in both jar shape and overall color for their cleansing skin cream instead of going with a stronger, image-driven design, they gave up the competitive advantage that usually sets them apart from the national brands.

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may be printed by flexography.

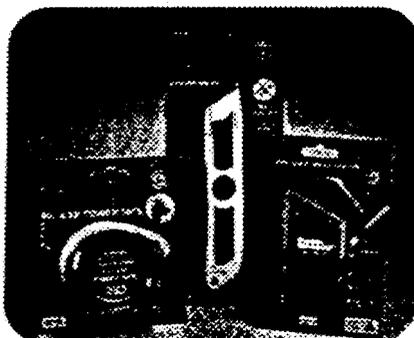
A major challenge is to maintain package design integrity, of which color reproduction quality is an essential element, across all markets, printing methods and substrates.

Ideally, you should never initiate a package design without fully understanding the reproduction requirements, technical resources and quality



*Dial takes advantage of the latest color trends in an aggressive restaging of its bar and liquid soap packaging, particularly for the new Crystal Breeze antibacterial deodorant bar soaps. They are distinguished by their blue and green colors and soothing, cool back-to-nature graphic.*

*Through the consistent use of its red-and-black billboard packaging design, Wal-Mart's Popular Mechanics brand sells well against the nationally advertised, segmented variety of household tools.*



of materials in your market.

Resources can be radically different if you're printing packaging in the Far East or Latin America as opposed to more technologically advanced regions like the United States or Europe.

For example, although printing in the Pacific Rim can be fine, printers there tend to use a straw-based corrugated stock. On those packages the ink may not adhere as well to the fibers, and color is the first thing that falls apart in printing.

Additionally, the production people should be involved with the designer

*The Nelson line of garden hose accessories, marketed through mass merchandisers and usually displayed on pegboards, uses dark packaging to be a foil against bright yellow products. The result is a highly visible line.*



at the early stages of the design process.

You need to work in concert at the outset to address such issues as printing methods and color limitations and market standards, substrate details, copy limit areas, system components, and type specs. Doing that helps to avoid costly reproduction problems later on.

In the case of Scott's lawn and garden products, more than one printer reproduces the packaging so the substrates they use tend to vary. For instance, the Turf Builder line is printed on multiwallpaper bags and polybags by different flexo printers using seven-color presses.

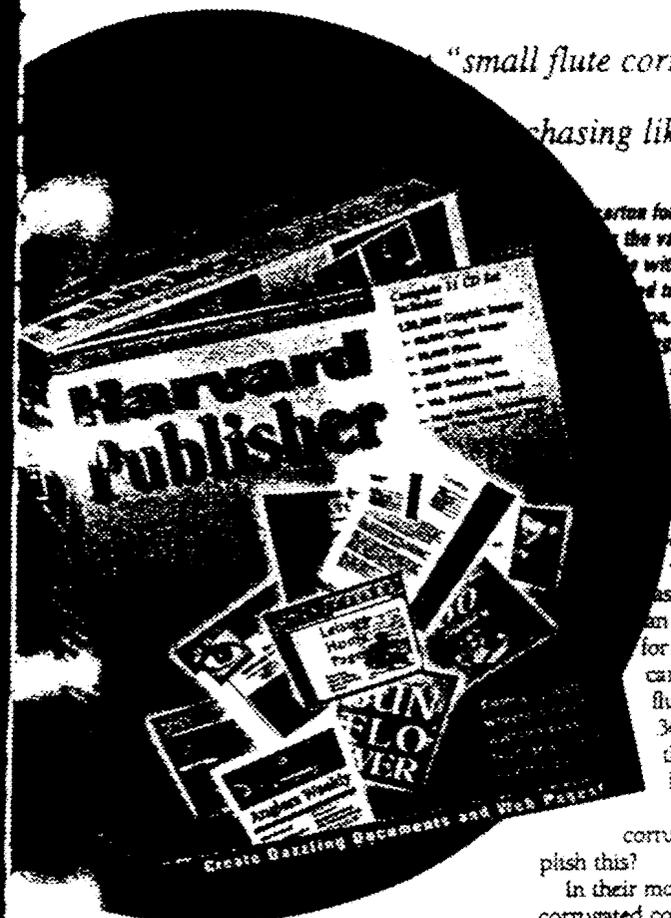
Adjustments have to be made to the initial artwork so the final product, including the color, looks like it came off the same press. ■

*The author, Paul R. Sensbach, Ph.D., is Senior Vice President Sales & Marketing of Fisher Design Inc., a leading packaging design firm in Cincinnati. He is formerly Director of Packaging and Creative Services at Kraft Foods and Procter & Gamble.*

# OPTIONS FOR 'DROP-DEAD' GRAPHICS FLOURISH ON NOT-SO-ORDINARY BOXES

"small flute corrugated" highlight upscale printing,

... purchasing likes the price, too.



... carton for Harvard Publisher demon-  
strates the variety of graphic effects  
possible with preprinted facing stock  
on small flute corrugated.  
... from Inland Paperboard and  
... includes litho printing, hot  
and embossing to highlight  
of the software package.

... carries aggressive  
graphics.

The second point—small  
flute corrugated containers  
win friends in the pur-  
chasing department. They  
can reduce packaging costs  
for products currently using  
cartons because the small  
flute containers may have  
30 percent less paper fiber  
than an equivalent solid  
fiber carton.

How can small flute  
corrugated containers accom-  
plish this?

In their most familiar incarnation,  
corrugated containers are seen as  
brown shipping boxes. These boxes  
typically use what is called  
"C-flute" corrugated paper-  
board—the wavy paper  
between the front and back  
sheets.

#### Impact on graphics

But newer boxes feature  
flutes with a shorter distance  
between them. "E-flute" is  
smaller than "C-flute," and  
"G-flute" is even smaller.

Why is this important to  
graphics?

First, a smaller flute lets the  
sheet of paper that is on the  
outside of the box lie flatter.  
The bigger flutes create what  
is called a "washboard" effect

on the paper between the flutes.  
Sheets that lie flat simply display  
graphics better.

But the increasing use of the small  
flute corrugated boxes is accompanied  
by the use of preprinted top sheets.  
The sheets can be higher quality  
paper and can accept high-quality  
lithography as a printing technique.

And because the top sheet is deco-  
rated before it becomes part of the  
corrugated structure, decorations can  
include hot stamping, embossing or  
debossing, die cuts, silk screening and  
coatings to achieve graphic impact.

Here's how it works in practice with  
the package for Harvard Publisher, a  
software product.

The package needs to be sturdy  
enough to hold 11 CDs along with  
manuals. Yet it needs to have enough  
graphic pizzazz to reinforce the value  
of the sophisticated product that  
retails for \$69.95 and often needs  
to sell itself because store help isn't  
available.

Software Publishing Corp., mar-  
keter of the Harvard Publisher brand,

opted for an "E-flute"  
corrugated box. It  
provides the strength  
to hold all the compo-  
nents.

Yet the decoration on  
the top sheet conveys  
the image needed. In  
addition to lithographic  
printing, the paper was  
CONTINUED ON PAGE 54



Shelf impact for  
Gentleman Jack  
Tennessee Whiskey from  
Jack Daniel's comes from  
a carton featuring gold  
hot stamping and embossing  
against a high-gloss  
black background.

In packaging jargon, the term is  
"small flute corrugated." It applies  
to boxes and cartons. Remember it,  
because unlike most packaging jar-  
gon, it signifies an important advan-  
tage for marketers.

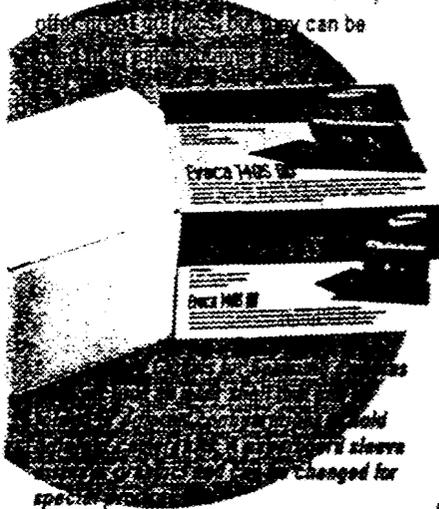
• First and foremost, cartons made  
from small flute corrugated paper dis-  
play graphic snap.

The improved graphics respond to  
the need for better presentation of  
products more often sold in a self-ser-  
vice environment—consumer elec-  
tronics, automotive aftermarket, hard-  
ware, sporting goods, small appli-  
ances, power tools and software.

And the containers also work for  
other products—liquors, gift boxes,  
produce and even ice cream bars—  
almost any product that needs a car-

# CONSIDER THE STRUCTURAL ELEMENT, TOO

Small flute corrugated containers may offer more than you think they can be.



Small flute corrugated containers can help you

simplify packaging operations, too. Samsung Camera used a small flute box to improve the appearance for a line of cameras while simplifying packaging operations.

Samsung's line of cameras and kits includes components such as carrying

cases and batteries. The marketer had used a traditional paperboard carton that suffered cosmetic damage—dents and dings—in shipping and display.

The new package is an E-flute corrugated carton that holds the camera and components firmly in place. The corrugated material has several die cuts that are folded to accommodate several camera sizes and kit configurations.

A paperboard sleeve goes over the corrugated shell to carry graphics and consumer information.

The sleeve also allows Samsung to develop promotional packaging with a change on the sleeve graphics, while using the same shell.



In another example of how structure meets marketing needs, this box for Home Page software has "feet" that keep the box from "rocking" on store shelves. The container is from Inland Paperboard and Packaging.



CONTINUED FROM PAGE 53

embossed and included gold hot stamping to add to the value perception. The container is produced by Inland Consumer Packaging.

The container also includes what is called a "fifth panel"—a flap on the carton's back side that triples the amount of graphic area on that side of the carton.

The small flute corrugated carton product replaced a two-piece package that consisted of a paperboard sleeve that fit over a corrugated box. The sleeve provided the graphics while the box added the strength. With one box, Software Publishing cut its costs and inventory requirements and had the graphics it needed.

## Questions to ask

In looking at how small flute corrugated containers could help you, here are some questions to ask:

1. Are retailers pressuring you to eliminate master shippers? Retailers are saying, "We have to get rid of master shippers or shipping cases," says Sandra Minke of International Paper. "They don't want

to have to deal with them as trash."

With the small flute corrugated containers, it may be possible that the strength of the boxes themselves allow you to build pallets without master shippers, which means they deliver more strength at a reduced cost.

2. Do you need to display your brand identity on packages retailed in a mass merchandising environment?

Use of preprinted facing stock on small flute corrugated boxes can help present your graphics uniformly, notes International Paper's Brian Balviel. You can have the same facing stock on different sizes of cartons, contributing to uniform graphics.

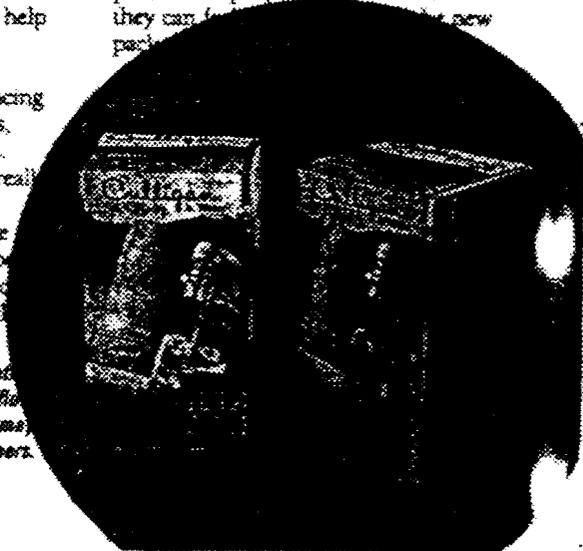
3. What kind of paper do you really need on the facing stock?

When working with small flute corrugated containers, you may be able to customize the package and select among different facing stocks.

Graphics for Colligan home water filtration products are printed directly on G-flute corrugated stock, a process that may reduce lead times in producing containers.

Now you can use upscale papers where it might have been cost prohibitive before. For example, the Showcase facing stock from Westvaco offers a bright white surface for high-impact printing.

4. Can the new packages run on your existing cartoning equipment? On the packaging line, small flute corrugated containers should perform the same way that solid paperboard cartons perform. Coordination with production people is important so they can learn to run the new packages.







# WHAT CONSUMERS WANT IS SEAMLESS PACKAGING

*Consumers are tired of packages that demand time and attention. They want no-hassle packages that work over and over and over.* BY MONA DOYLE

In a recent focus group in New Orleans, one of the thirty-something's described a folding carton ice cream package as a dinosaur. Participants grinned and grimaced in acknowledgement of just how hopelessly behind-the-times some

packages are.

The reactions illustrate the current state of consumer expectations for less-hassle, more-efficient packages. Consumers are tired of packages that make demands on their time and attention.

Consumers are ready for the dinosaurs to catch up with the twentieth century, but they aren't quite ready for Buck Rogers packages that do things on their own.

They want quality-of-life improvements that save time.

# WHAT PACKAGING FEATURES REALLY IRK CONSUMERS?

Here are the results of research by The Consumer Notebook that details what packaging features really irritate consumers. Direct consumer comments pinpoint the source of frustration.

**1. Small print and hard-to-follow instructions that are effectively useless such as "Press Here To Open" continue to frustrate consumers.**

Consumers believe that packaging operations should be obvious.

"The way to open and close a package should be clear without reading anything. You should see it and just know—the soft drink."

"The cold cuts of ham and deli turkey come in packages that say 'just pull it off.' It's supposed to just zip right off. You know what I mean? Pull it right off and it's supposed to reveal them. Well, many times you take it and pull it off—it just happened to me the other day and I could not get it open. I was trying to make a fast sandwich and get out of there. I tried, I tried—I had to get a scissors finally and cut it off. And then there was nothing to reveal at all and I was disgusted."

"The deli packages are especially nice if you get the kind that is perforated and all you have to do is tear it and then you can open it and reveal it. I have come across some where you have to actually cut it in order to get to it. That's not convenient at all."

**2. Features that make packages work better are appreciated and go a long way toward reinforcing loyalty purchase decisions.**

Consumers find a lot of reasons to like and purchase juices that use the twist-off closures on gable top cartons.

■ They avoid the frustration and struggle of opening the gable top.

■ They have a package which is easy to open and equally easy to reclose.

bumps and hassle. And they want packages that are more pleasant to use as well as to look at. Here's what they expect in a package:

- Portability
- Product protection before and after opening
- Product visibility

■ They can locate a date without package without the contents being about.

■ They believe the package is more sanitary—because the contents aren't coming in contact with the handled lip.

■ They believe that the contents stay fresher longer—because of fewer bacteria and a tighter seal.

**3. Freshness dates are a must for consumers who rely on them.**

Consumers who look for dates don't buy products when they can't find one. One respondent voiced anger at General Mills for not dating their new fancy-recipe Country Inn cereals.

"I'd heard the Country Inn cereals were really good and I was about to buy one when they were being sampled but to spend \$4.99 for a little package of cereal that had no freshness date—even though I liked the sample a lot, I decided against it. It's just too much to spend without knowing that it's fresh."

**4. Freshness poses special problems.**

"We buy those large size, kind of clear plastic canisters that might be hanging up in a grocery store. And we open them. The bag pops—everything's everywhere. It doesn't stay. And we have candy everywhere."

**5. Cereal boxes are still a widespread source of frustration.**

"You get the big ones because you think they are the best deal and you can't fit them anywhere.

"Because you can't eat that whole box in one day and yet you're folding it down and you're trying to keep it fresh. By the time you finish rolling it down to attempt to keep it as fresh as you can, all of the cereal has condensed to the bottom of the box.

- Hand-purse and pocket friendliness
- Flexibility
- Versatility
- Easy-fit storable
- Easy readability
- Eco-sensitivity and home-trash reduction

"I don't know why you have to fold the box, but I know it's not good because all the cereal is at the bottom and you have to roll it up and down to get the cereal back to the top. The box will close correctly. And by that time your plastic bag inside has unwrapped and you're cereal's stale the next week anyway."

**6. Bread bins galled consumers as important. Bread packages haven't kept pace.**

"Bread packages are terrible. Especially rye bread. Well maybe, they had the soft plastic bag on the outside and then the cellophane inside. That cellophane never lasts. It's folded over and is sealed or something. The minute you open it up, you can never reseal it."

**7. Health and beauty packages complaints are based on what as well as convenience.**

"I have a head with spray deodorants because the tape cling up before the whole thing is finished and so I get—what? 25% free, so they say at the top of the can, but I'm throwing 50% away because I can't get it to come out."

**8. Ready-to-eat meals would do even better with better performing packages.**

"You get a big bag and if you are only going to use part, there is no way to reseal it. It opens across the entire top and you can't pull it over and close it. It just goes everywhere and it is bad the next day."

"The bagged meals are time-consuming. They would be better if you could reseal the packages without a rubber-band because it squishes the greens and they only hold up for a day anyway."

- Easy opening
- Easy access to the product
- Clear freshness dating.

Consumers are quicker to complain about under-packaged inconveniences than over-packaged trash-fillers, but they welcome improvements. CONTINUED ON PAGE 3

## WHAT DO CONSUMERS WANT FIXED FIRST?

There's wide agreement and strong feelings about many categories in which consumers believe that packaging should be improved.

And making improvements could influence sales. The latest research from The Consumer Network suggests that in the cracker and cookie category, 60 percent of category users will make a purchase decision based on improved packaging.

The table shows that, depending on product category, as many as 80 percent of consumers will make a purchasing decision based on a packaging improvement.



CONTINUED FROM PAGE 33

on both sides. They are willing to make brand choices based on packaging that works well—especially if it enables them to reach a goal faster or with less work.

They are frequently—but not always—willing to pay more for the improvements.

Besides being more interested in better packaging, awareness of packaging changes continues to escalate.

### Packages as cultural icons

A currently circulating business story about today's college freshmen (most born in 1981) uses package-function memories to pinpoint today's students in time.

The story points out that these students grew up on microwavable popcorn, don't remember when McDonald's came in Styrofoam and believe that bottle caps have always screwed on and always been plastic.

The *Wall Street Journal* recently did a story about Bayer removing the cotton wadding from aspirin bottles. The story covered the brand identity of the cotton inserts and the pro- and anti-cotton consumer perspectives.

The story suggested that removing the cotton was taking away something that many consumers valued and believed in.

Our focus group research suggests that the truth is closer to the reverse. Many consumers are irritated with large bottles

“that are half filled with cotton that you can't even get out” without knives or tweezers.

What was most telling about this story? It wasn't the relative impor-

The big benefit consumers saw in this package was the ability to be a perfect (Martha Stewart) hostess to unexpected guests—a frozen pie in a MicroRite™ package heats in 18 minutes.

And more and more marketers are beginning to realize the dramatic potential of packaging function to influence product usage.

Two of the best examples are sports-cap water bottles, which function seamlessly. The other example is resealable shredded cheese packages that helped shredded cheese replace other cheese forms including the once-ubiquitous Velveeta in a great many households.

Consumers find it much easier and faster to shake out some shredded cheese on to a burger or a salad or a casserole than to unbox, unwrap, slice, and close up a package of Velveeta. Ergo, sales of shredded cheeses skyrocket while sales of Velveeta plummet.

The Consumer Network recently conducted a study of product qual-

## CEREAL BOXES ARE STILL A WIDESPREAD SOURCE OF FRUSTRATION.

tance of the pro- and anti-cotton factions. Rather, it was how a relatively minor but widespread packaging change signaled both a lifestyle change and a business change worthy of the front page of *The Wall Street Journal*.

The fact is that the selling power of packaging is escalating as packaging function gets better. It is escalating as branded packages begin to appear on the market with their own identities such as Zip-Pak™, VersaTray™ and MicroRite™.

In focus groups conducted for Fort James consumers were so taken with MicroRite™ packaging for pies that some participants actually volunteered to pay a premium for it.

ity perceptions. It was also reported on a front page of *The Wall Street Journal*.

This study reported that the highest of all quality perceptions among 30 categories went to Soft Drinks. Seamlessly, easy-to-use, quality-of-life packaging is one of the reasons for soft drinks' super-high quality ratings.

Now, most big-brand bottlers have stringent quality control of their products and packages. There is little reason for the soft drink bottlers not to achieve something close to zero defects.

### Package quality equals product quality

Coca-Cola became a global powerhouse because a Coke is a Coke is a Coke.

CONTINUED ON PAGE 34

## WHAT FUNCTIONS ARE CONSUMERS READY FOR?

The Consumer Network has tested many new packaging concepts on its panel of shoppers and found several concepts with wide appeal and high potential for titing purchase decisions.

One of the favorites is a package that can be harmlessly composted or put in the garbage disposal. That concept scored a whopping 72 percent for purchase decision impact—a score that suggests that minimizing and simplifying trash deserves a lot of creative thinking that goes beyond recycling and reuse.

Packages that fit anywhere are equally important. In the new millennium, packagers and package designers will have to pay closer attention to consumer's needs and lifestyles. Cargo pants swept the fashion scene because it is easy to stash cell phones in their roomy pockets. Packages have to work the same way.

Futuristic concepts that suggested a loss of control by the consumer generally scored very poorly. In spite of their love affair with zippers and reclosing packages, few consumers like the idea of packages that close automatically after being left open for a fixed period. Even fewer like the idea of packages that signal or initiate a reorder when approaching end.

CONTINUED FROM PAGE 34

anywhere in the world. The recent fall in Coca-Cola's stock price in the wake of the headline quality problems in Belgium gives additional support to the notion that near-perfect quality control is why soft drinks scored above all other products.

However, many American consumers, including those responding to our survey, experience soft drinks gone flat from time to time. They have also encountered soft drinks in unopenable cans. And

they have tasted very off-flavor diet soft drinks with dead sweetener because Nutrasweet has a relatively short shelf life.

So the near-perfect quality ratings were a little puzzling to us until we saw the results of our own summer 1999 Packaging Survey. Lo and behold—what was the hands-down winner of the "What Packages Do You Think Are Better Than They Used To Be" question?

Soft drinks won, especially individual-sized soft drinks, which some called soda and some called pop and some called by actual brand names such as Coke.

This parallel could be coinci-

## THE SELLING POWER OF PACKAGING IS ESCALATING AS PACKAGING FUNCTION GETS BETTER.

dence but we don't think it is.

Our research suggests that a perceived-as-perfect, go-anywhere package goes a long way toward suggesting a perceived-as-perfect product.

And conversely, that poor package performance weakens the quality image of the brands and products inside.

What happens to perceptions of cereal or chips when opening the packages results in a split down the side? How do people feel about the quality of the paper when the wrapper it comes in is split from the get go? How do consumers feel about the quality of the ice cream when it leaks out of the carton sides as soon as it even begins to soften?

Seamlessness is the emerging criteria for packaging in many consumer, business and medical product categories. Today, many packages present users with big bumps and hurdles. Seamless packages can be used and discarded seamlessly and gracefully

Within a decade or so, packages will probably have to be clickable. But packages that are being designed right now should be manageable with one hand so the other can go on holding a mouse, a wheel, a phone, and a child. ■

The author, Mona Doyle, is CEO of The Consumer Research Network, Inc. Her forte is marketing and packaging research and strategy development. She published the Consumer Research newsletter and is editor of the book *Packaging Strategy: Winning the Consumer*.

### REPORT DETAILS CONSUMER INSIGHTS ONTO PACKAGING

Details and demographics on consumer reactions to all concepts discussed in this article are in a report titled, "Packaging At The Turning Point."

The findings reiterate the importance of good design that goes beyond graphics and beyond convenience to creating seamless packages that enhance the quality of life.

Where to go for more information...

► The report "Packaging At The Turning Point," At The Consumer Network, contact Mona Doyle, 215/235-2400 or E-mail [consumer\\_network@compuserve.com](mailto:consumer_network@compuserve.com)

# FLUORESCENT COLOR GAINS IMPACT, TOO

*Integrating them into an overall package design yields the impact they're famous for without cheapening a brand.*



Goldfish crackers use fluorescent colors to differentiate a line extension. The more highly flavored version of the brand, often positioned among salted snacks, uses fluorescent inks to signal its more intense flavor.

Fluorescent inks rank high on the list of quick ways to get shelf impact. In many cases, the challenge is to gain impact without graphics that cheapen a brand.

Fluorescent designs dominate categories such as laundry detergents, but they also work in other categories.

A classic example of differentiation comes in packaging for Pepperidge Farms Goldfish where fluorescent inks

signal the difference between the original cracker and a more highly flavored extension into salted snacks.

As a cracker, Goldfish are in bags printed with color graphics. But when Pepperidge Farms extended the line into salted snacks, it relied on these tactics:

- The salted snack version is in a gable-top carton, compared to the bag, for the traditional snack.
- The salted snack version uses fluorescent inks by Day-Glo Color Corp. to compete for attention and to accent a more intense flavor profile.

The snack's "extra pizza flavor" version, for example, has a magenta fluorescent accent that differentiates it from the traditional pizza-flavored Goldfish snacks. The package also incorporates a fluorescent yellow to heighten the goldfish icon.

The key to using fluorescent inks is to understand that they are transparent inks with less color density than

process inks. If used by themselves to create color "pop," fluorescent inks may complicate package printing by requiring multiple passes (or bumps) to deliver more color density.

But, suggests Jonathan Aber of Day-Glo, using fluorescent inks along with traditional process inks can achieve the effect without multiple passes.

"You can use a red fluorescent ink as a fifth color, and overprint an area on a carton that already has a process red on it. That combines the density of process red with the intensity of fluorescent red, and lets you do it with just one 'hit' of fluorescent ink."

Fluorescent inks also create multiple colors.

Aber says, "Print the same red fluorescent ink you are already using on a package over process blue, and you have a fluorescent purple."

A few other tips in incorporating fluorescent colors in package graphics:

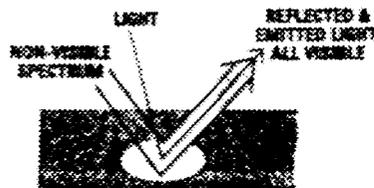
- Don't screen colors. They look best at full strength.
- Design in contrast, allowing the fluorescent colors to "pop" against a contrasting color, especially black.

## HOW IT WORKS

Fluorescent effects result from ink pigments that seemingly amplify light to produce greater intensity.

Fluorescent pigments reflect the visible light people readily see, but they also absorb light in the non-visible spectrum and then emit it as visible light.

The result is that fluorescent inks can appear to be as much as three times brighter than conventional inks.



### Where to go for more information...

... Designing with Day-Glo's experts on how to use fluorescent colors, shows the colors and effects, and details such as settings on Day-Glo. At Day-Glo Color, Jonathan Aber, at 216/391-2200, or [jaber@dayglo.com](mailto:jaber@dayglo.com)

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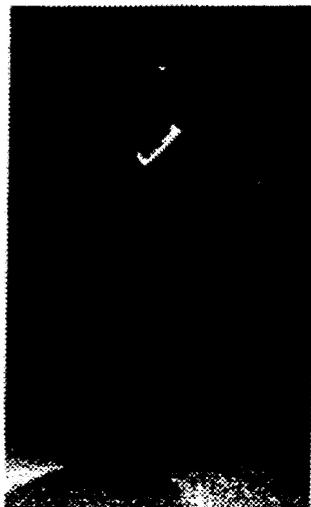
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The package—more and more—has to sell hard from the store shelf. That's because the package needs to break through a glut of marketing communications and a glut of brands out there.

If you look at leading packaged goods marketers, you'll see a pattern... a management process that they follow to gain the biggest "voice" the package can project from the store shelf.

We call that process the "Five Steps to Packaging That Sells." The steps are pretty straightforward.



1. Know your consumer. And that means getting into the consumer's head and heart to learn about what motivates the purchase.

2. Take the big-picture approach. Packages that are most effective borrow ideas from a wide range of other product categories. And they look at all forms of packaging and put the best ideas together in unique ways.

3. Understand that package aesthetics and function are both critical. The package has to grab consumers' attention in a sea of competing messages. But it has to work well so the consumer will buy it a second time.

4. Know your distribution channels. How do retailers view your package? How are channels changing? What mass merchandisers like what package configurations?

5. Have management solidly behind the concept that packaging is a key marketing tool.

That's the short, short course. We have a management report that expands on this process. I'd like to send you a copy. Just e-mail me, ask for "Five Steps to Packaging That Sells," and give me a street address. I'm at [jpeters@brandpackaging.com](mailto:jpeters@brandpackaging.com).

James W. Peters, Editor-in-Chief

## C O N T E N T S

- 6 RETAILER BRANDS ... Post solid growth
- 8 QUICK ROUTE TO ... Retortable, barrier trays?
- 8 IS NOW THE TIME FOR ... Case-ready meat?
- 13 MULTITHERM ... Microwave processing
- 15 MORE LABELING IDEAS ... Solve marketing challenges
- 18 CATERING TO KIDS ... By seeing what motivates them
- 25 THE RETAIL ENVIRONMENT: ... Getting authentic gets customers
- 32 WITH "FLAT PACKAGING" ... IKEA sells a business philosophy
- 37 VISUAL IMPACT HEIGHTENS ... Cans' marketing role
- 38 RETAILERS, CONSUMERS SAY: ... Innovate packages for freshness, safety
- 43 ICONS ... Speed communications
- 45 EVOLVING A BRAND: ... Reach new buyers, keep loyalists
- 50 HANGING BOTTLES ... Emerging from checkered career
- 52 WORKING WITH SUPPLIERS ... When the goal is creative packaging

# VISUAL IMPACT HEIGHTENS CANS' MARKETING ROLE

*Shrink labels, color graphics on can ends and the creative use of shape help cans work harder as a marketing tool.*

**B**y leveraging high-impact decorating methods and using shape creatively, marketers who package products in cans are finding ways to gain shelf impact with a packaging form most often considered mundane.

The techniques are not breakthroughs, but if you know how they work and how to choose them judiciously, you can add pizzazz to cans.

Among can techniques, shape may have the most impact, allowing a marketer to gain ownership of an image in a category. Shaping adds cost but contributes to success when done right.

Among current examples is Comfort Foods Co. with its Harmony Bay Coffee. The original barrel-shaped cans gained shelf space in the highly competitive canned coffee market.

Now the company is extending the use of shape as a marketing tool. It is touting shaped cans as a "reuse" package. Once empty of coffee, a special line of cans are offered

suited for home decor printed on cans.

A label at each can's waist carries brand information, and it can be removed when the container becomes an in-home canister.

The can's structure supports the re-use role. A foil lid sealed to a rim at the top seals the container. By removing it, the consumer has a good-looking reusable canister.

Beyond shape, cans gain impact with decorating techniques that add visual impact. One approach is to print on what is usually thought of as the can's bottom.

The process works with two-piece cans. The "bottom" is printed and cans are stacked "upside down."

That way, added graphics are visible as shoppers scan lower shelves where they would ordinarily see only a bare metal top.

The process lends itself to higher value products, with Swanson's Chicken Salad being one U.S. product in such a can. Condiments from overseas are also seen in such packaging.

The method relies on what is called "distortion printing." Graphics for the can's bottom and sidewalls are printed on flat metal sheets before the can is formed. Graphics and text on what becomes the sidewall are distorted in printing so that when the metal is shaped into a can, the graphics look normal. Even the UPC can be printed



*Harmony Bay Coffee cans offer added value to consumers who can use them later as storage canisters. Consumers strip off the label and reuse the plastic closures.*



*U.S. and overseas marketers are decorating can ends to gain added billboard. On lower shelves, the technique displays graphic rather than blank ends.*

#### Decoration fits home décor

The Harmony Bay cans have contours at both top and bottom. They have a lithographed background well-

as promotional canisters, good-looking enough to have a

place on a kitchen counter top or pantry shelf.

this way and "read" on the shaped can.

The process isn't easy and packagers may have to rely on can vendors to produce cans this way.

Another graphic tactic to consider in decorating cans is the use of shrink labels. They are printed with intricate graphics and then applied to plain metal cans.

They give marketers several advantages, including the shine and graphic snap inherent in printed films.

This type of label has added graphic snap to Spam cans, besides the well-known shape that's made Spam an icon in this category.

Shrink labels also allow shorter runs. Rather than stocking individual cans, preprinted for each flavor in a line, a packager stocks just one can and applies different labels during the packaging process.

# ICONS SPEED COMMUNICATION

*Time-pressed consumers need to get information such as cooking instruction fast, and icons deliver it quickly* BY MARILYN RAYMOND

Time is so precious to us as consumers that we actually "manufacture" it—we do two things at once like making cell phone calls while driving the car.

With time that precious, it is imperative that marketers do not become stumbling blocks to consumers' day-to-day activities.

Yet, marketers do become stumbling blocks, especially with crowded packages and hard-to-read instructions.

Often in a retail outlet, you can see a consumer turn a package over and over again looking for the preparation or handling instructions. When they do find them, often they are in fine print and are hard to decipher, which can present a problem.

Enter President's Choice, the retail brand for Loblaws in Canada and licensees in the United States. This brand helps consumers through their indecision about choosing a product with a series of icons on its frozen food packages.

The icons appear on the bottom right corner of frozen entrees. They quickly help consumer see if a product is vegetarian, organic, microwaveable or oven-ready, and how long it takes to cook.

## Predictable location

These icons work because they are color coded and stacked in the same place on every package. Consumers can read them easily as they comb through the frozen food aisles for a meal suitable for the time constraints of a specific meal occasion.

Consumers find icons and symbols a user-friendly way of receiving information. Icons are a legacy resulting from our growing familiarity with computers.

In Canada, Loblaws has an additional incentive for relying on icons. Canadian marketers, by law, need to

communicate in both "official languages," so they've developed a pictorial way of telling consumers what is what when it comes to package information.

Canadian apparel manufacturers use symbols for washing and care instructions as do laundry soap manufacturers.

While this trend in Canada is spurred by the legal dictates, the basic challenge of communicating with consumers who read different languages is just as important in the United States.

Today's multicultural world and global marketing efforts make pictures and symbols critical, and soon this type of communication will become the standard in cooking and handling instructions.

## Make them easy to see

To be truly successful, symbols and icons need to be easily seen.

Contrasting colors to the package graphics and positioning in some standard corner of the package provides quick, easy-to-read information. Packers have always used flags or bursts to highlight "new,"

"enriched" or "fortified" on packages. Now even phrases such as "microwaveable" or "ready in 15 minutes" has been flagged.

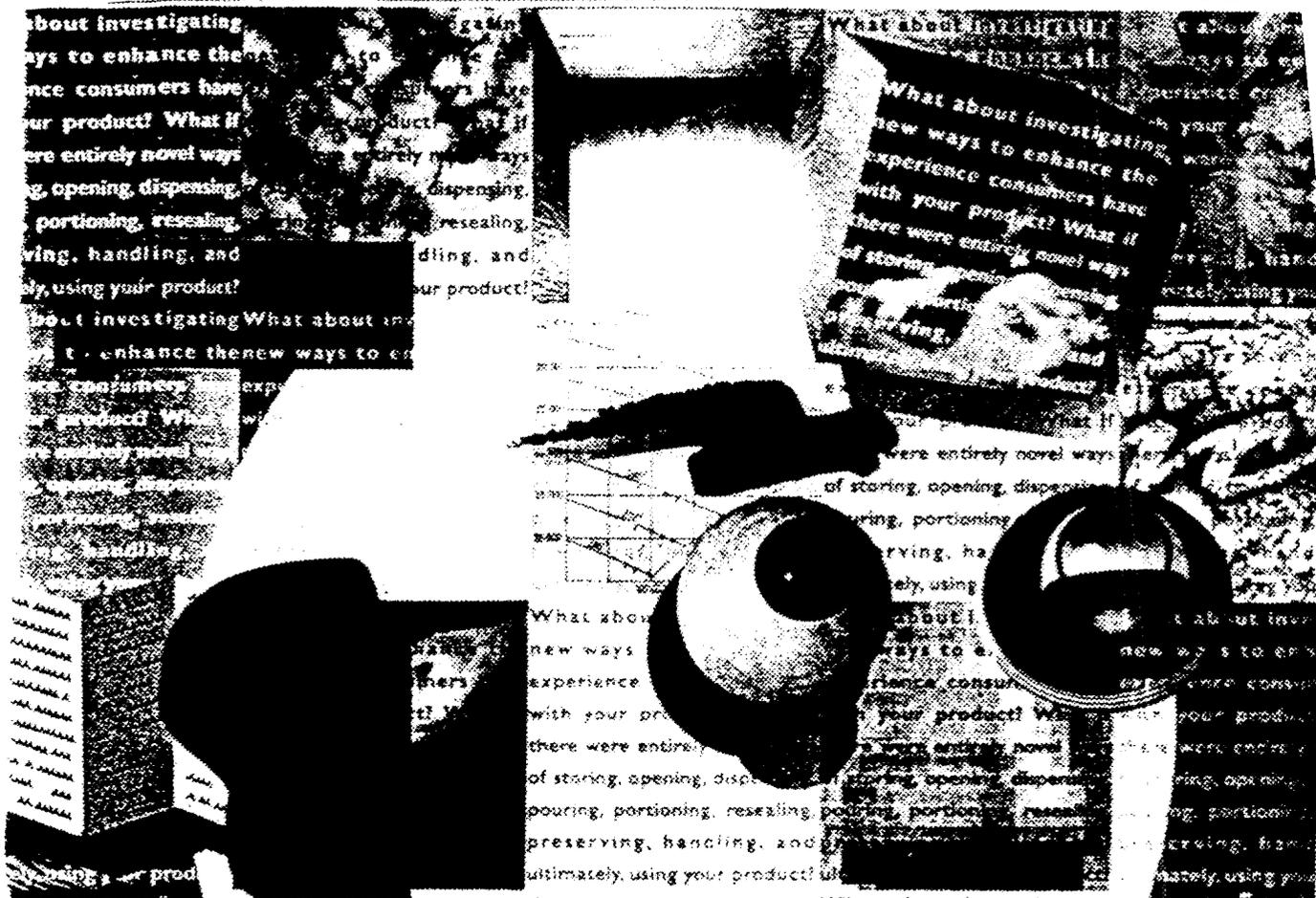
But these flagged benefits can be found anywhere on the package in varying typefaces, colors and sizes. Given the proliferation of other information on the package, these benefits are quickly lost in the clutter.

The list of packages that failed is littered with examples of graphics that did not highlight the product's benefit. Often the benefit was lost among the clutter of other design elements.

Consider icons as a way to break through the clutter and deliver a benefit to today's time-pressed consumers. ■

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# BREAK-THROUGH CONCEPTS FROM BEYOND THE FOCUS GROUP

*It takes more than graphic "tweaks" to regenerate a brand or invent a category.*

*You have to meet the consumer at the store shelf or in the home.* BY KEN MILLER

There isn't a marketer around who wouldn't want to re-energize a mature brand or invent a new category with product innovation that motivates trial and cements loyalty.

Typical efforts include reformulating, resizing, updating graphics, repositioning and otherwise tweaking on dimensions that offer little product news and scant ability to cut through the clutter.

What about investigating new ways to enhance the experience consumers have with your product? What if there were entirely novel ways of storing, opening, dispensing,

pouring, portioning, resealing, preserving, handling, and ultimately, using your product?

Ingenious structural packaging that breaks new ground with real in-use benefits can work in tandem with an existing formulation to reward consumers with shift-the-curve levels of satisfaction.

But now the scary part: What should that new delivery system be? What functionality do consumers truly want? What barriers and dissatisfactions do they face with your package today? Could they tell us? And if they could, how can we translate that input into actionable, afford-

able structural solutions?

In all likelihood, your new product development process calls for "consumer validation" research as one of its phases. Without thinking too much about it, you order eight focus groups and concept boards for some rapid-fire, multicity "voicing and validating."

In this fashion, you present concepts from internal brainstorming, ask consumers to state a preference, and hopefully, validate the idea everyone already likes best.

What if you thought about research and concept generation in a completely

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different way? What if instead of using research to screen mature concepts, you used it to generate "springboard ideas" for structural packaging earlier in the process?

It's acknowledged that consumers hardly ever do, buy, pay and believe what they say they do.

It's not that they get their jollies from sending you down the wrong path. It's just that when asked to choose among alternatives, they can only choose the one they like best, not one that will motivate them and solve their problems in absolute terms. And your \$50 makes them eager to please.

So engage them in a concept generation phase. Pull them onboard with you as members of

your creative team. Give them the latitude and stimulus they need to help you originate packaging functionality that offers them truly relevant and meaningful benefits.

Here are a few of the tools you can use to involve consumers up front in surfacing great ideas. Don't expect to get refined solutions from these activities, but do expect some high-octane fuel for creative thinking.

### Shop 'til you drop

How much time does your team spend in the stores? Chances are, your product is found in a lot more

outlet types than just a few years ago.

What do those facings look like? How is your competition presenting itself? Even more important is the learning you can gather about the attributes that motivate decision making as that decision process is taking place.

Intercept some consumers as they peruse the aisles. Ask them what distracts them about products in the category. Watch as they make a selection and talk to them about why. It's all about the two or three dimensions that really matter in your business at the "moment of truth."

For example, our work for a major snack-food company surfaced just how distinctive a competitor's package is, and

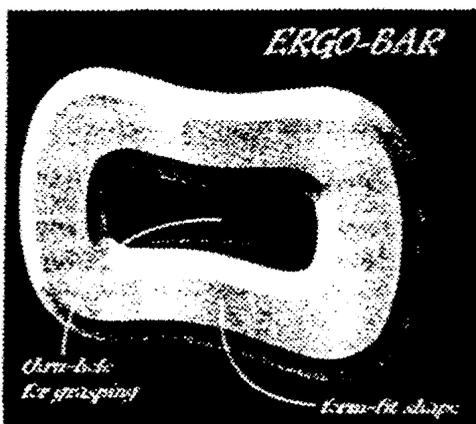
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## WHAT COULD BE WRONG WITH SOAP?

Let's say you are the brand manager for hand soap. Seniors are telling you that your bar is hard to handle, and poses a safety risk. How might the process just discussed address the opportunity?

1. You send a team to the stores, to find that:

- Seniors buy a curved, boxed bar



that fits nicely in their hands and is easy to open.

• They tell you that your soap is too bulky and comes in cellophane they cannot remove.

2. Then, you spend some time in homes, discovering that:

• Boxed soap is opened with a slip of a thumb; yours requires a scissors or nail file.

• At the sink, bar soap has been replaced with a pump dispenser (hmm...).

• In the shower, recessed soap dishes are too low and hard to access, creating a hazard.

• The shape of your bar doesn't roll in the hands the way seniors lather up. It's square and bulky.

• Therefore, it slips from the hand, requiring bending to retrieve it in a wet tub. This may be the most dangerous household behavior known.

3. Then, you bring some seniors in to help generate springboard ideas. One of the consumers picks up a new-fangled toothbrush and says, "What if the bar had a grip embedded in it?" Another handles a teething ring and says, "What if it was shaped so I could grab and hold it?" A third refers to a roll-on deodorant package and says, "Why can't I use it like this?"

4. Finally, you build mock-ups. The sketches we've printed here show you



how some of these ideas might look.

What you have done is to go beyond the focus groups to generate a breakthrough concept.

consumers were drawn to it. This information starts the team asking about what a break-through structural package has to do to motivate trial. It's one input, but it puts in the consumers' mind-set and context.

There's no better way to truly understand what consumers face in a store when they are ready to buy what packaging attributes can do to captivate them.

Then go home. Not to your home, but to consumers' home environments. The objective here is to witness how products are truly used.

Some folks call this an "anthropological study" or "contextual observation". At IDI, we call it "finding out

er if you saw what people go through to prepare, consume and clean up their beloved Quaker Oatmeal on a morning when they have four minutes to do it.

Film it, photograph it, record it. When you begin to see it in more than a few homes, it then forms the basis of a hypothesis you will seek to validate later.

**3 Fry it up in a pan**  
It's time to pull some consumers together to join your innovation team. Perhaps they are people you have already spotted in stores and visited, or they are fresh faces. We often use fresh faces because when we hear and see similar things from a broader base, we have more confidence.

These sessions look nothing like traditional focus groups. Objectives are different and the setting is differ-

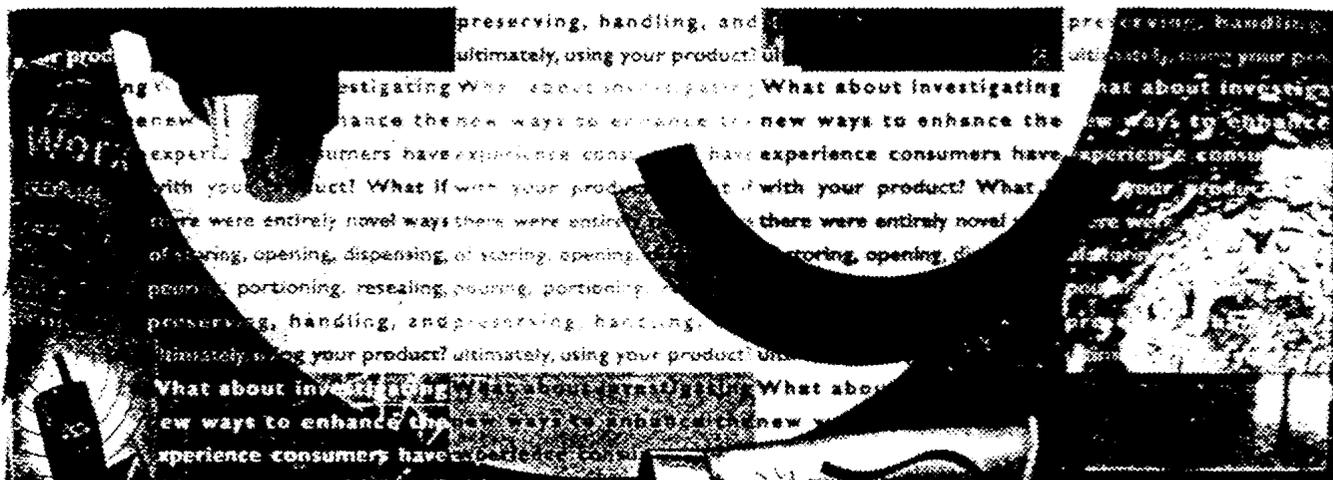
As they start to speak, the staff starts to sketch. Consumers react and explore. Ideas are refined.

Before long, dozens of interesting ideas hang on the walls. Some are immediately actionable, and others seem outlandish, but could be the seeds of something awesome. The process works for all kinds of products, from frozen foods to freezers.

Then, the truly creative idea-generation begins. As fuel, you have market understanding and "springboard ideas" that can't possibly fall through the cracks.

That input is fed into concept generation to yield a pile of truly actionable packaging concepts that address real needs and may even offer up the "wow" factor you have been searching for.

Be sure to staff this effort with your best creative talent. The leverage in



it's going on." As one output of work, define a "convenience point" that represents leverage points improving the entire experience a consumer has with your product. How is the product stored, used, dispensed, applied, served, opened, resealed, transported, cleaned up and disposed of? Once you have identified the relevant dimensions, note habits, practices and "work-arounds."

A work-around is an awkward behavior that consumers willingly engage in to overcome a blatant inconvenience. Consumers will tell you that their work-arounds are no big deal, but don't be fooled! Provide them with relief in functionality, and you'll own the market forever. You would be a believ-

ent. The mechanics are different, if not somewhat strange.

Forget the one-way mirror. These sessions are "all hands on deck." You and your consumers work together, perhaps with assistance from a creative resource who has been there before.

The objective is to originate what we call "springboard ideas" to drive later, more dedicated creative thinking. There are many ways to conduct these sessions (we call them INVISIONISM sessions), but one way is to present consumers with tangible stimuli that offer ingenious functionality.

Then ask them to smash the benefits of the product they like together with the category you intend to transform.

this approach is not the input itself, but what truly creative people can do with it.

There's no need to screen the concepts with consumers at this point. You know as much as you need to know to funnel down to the most promising conceptual directions. Then, you take hold of those and blow them out into multiple executions. ("I like the idea of spill-proof, but show me several ways that could really work.")

Then, bring them to life.

**4 Serve it on a cardboard platter**  
A great way to funnel down to a few of the most promising package structures is to develop 3D presentation models. CONTINUED ON PAGE 27

CONTINUED FROM PAGE 20

and let consumers handle them. Important. This is not a test of aesthetic or graphic design.

The objective is to have consumers identify the functional features that best fit into their lives, and refine them to fit even better.

The models may be mocked up in cardboard, foam or other flexible material that will allow consumers to role-play and describe how the package works for them.

Expect feedback such as: "This feels good in my hand." "This wouldn't fit in my cupholder." "My kid might swallow this." "It's too big for my pocket." or "I can't figure out how to open this."

We're searching for how well the structures address the key leveragable dimensions that surfaced in previous work with consumers.

When you hear resistance, ask consumers how the design fails and how it could be improved.

Have staff on hand (remember: "all hands on deck") to interpret feedback and translate it into real-time solutions. This is a working session, not a concept screen that could send you back to square one, so be prepared for a dynamic, fast-paced and very productive evening.

This worked great for 3M, where consumers told us how few prototype products for household protection could better meet their needs.

Once you're convinced you have a structure that offers wanted functionality, you can deal with aesthetics. What design execution signals the innovations best at the point-of-sale to captivate consumers?

What form, material and color conveys what you want to about product and brand imagery? What execution goes down the production line flawlessly and meets retailer needs?

All these and other issues become criteria for appropriate design once the break-through features have been identified.

Then, working prototypes can be made. These are critical for line-testing, consumer-testing, test-marketing and even management testing. With a go decision, you and your packaging engineers are off and running with clear direction.

While this approach seems rather elaborate, it can be managed quite cohesively. We find it works exceptionally well on several fronts:

It ensures pragmatic consumer input to concept development and eliminates the risk associated with "voting and valuating" focus groups.

It provides brand management with a compelling rationale for their recommendations. Senior Management feels comfortable with a course of action that involves consumers appropriate ways to focus on what matters.

It involves multiple staff functions early on for easier buy-in and support.

It drives better, more successful and often proprietary solutions.

So, consider this approach to packaging concept development a tool that can serve you and your customers better. It's a sure-fire way to generate product news with impact, re-energize a mature category, and create meaningful distinction that will aggressively pre-empt competition. ■

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# WORKING WITH SUPPLIERS WHEN THE GOAL IS CREATIVE PACKAGING

*They're part of the team, and how marketers shape a relationship determines just how good a package comes from the process.*

**B**randing is a team effort. And in this age of outsourcing, the way that marketers bring suppliers into the team during the development process is a key to eventual success.

That's especially true when the goal is to develop creative packaging that helps to sell brands and when the marketer's partner is a packaging supplier.

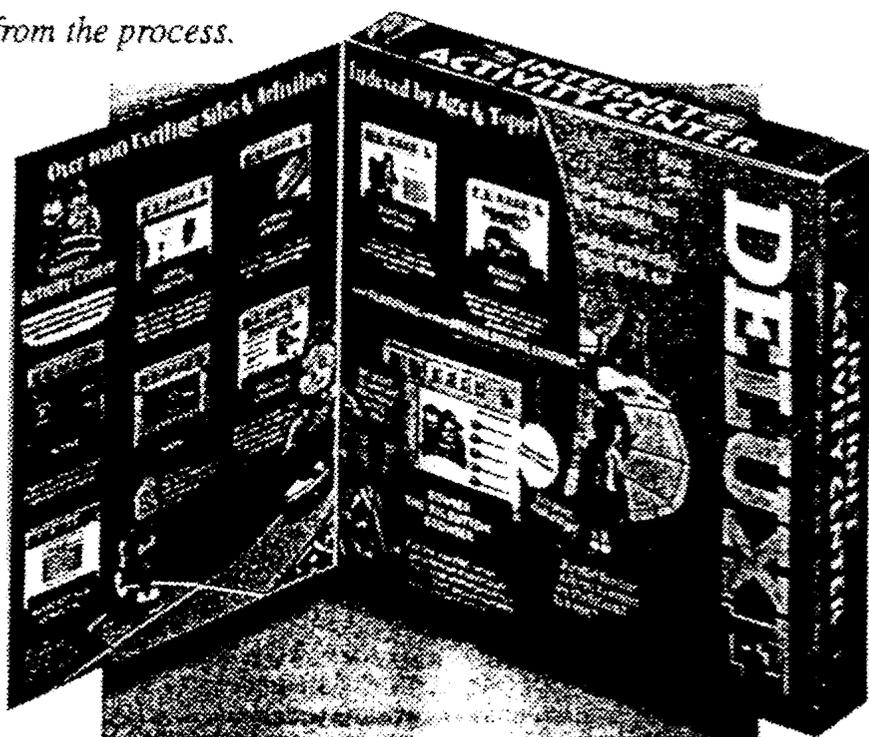
One perspective on how marketers can work with suppliers of paperboard cartons comes from Flour City Packaging, which suggests a 10-step checklist. These steps help to ensure that marketing concepts and package graphics are supported by structural designs.

"Marketers have to offer a product that consistently delivers on a promise to consumers," says Nancy Mosman, Flour City's Director of Market Strategy and Customer Focus. "Packaging suppliers can help deliver on that promise by creating a point-of-sale presence for the package. We can harmonize graphics and structural elements, and we can enhance the package's and product's functionality. But we have to be part of the development process to do that."

Here are the steps that Flour City Packaging advises marketers to take in order to execute innovative concepts effectively for the packages that arrive in store shelves.

## 1. Get involved in qualifying packaging suppliers.

Vendor qualification often rests with purchasing, and purchasing's emphasis may focus on supplier reduction. They may have a strategy of prime sourcing—using a single vendor for a particular type of product or service. And purchasing always emphasizes cost reduction, sometimes to the exclusion



*Extra panels on cartons become increasingly important as packages carry the load of the "silent salesperson." The trend is especially pronounced for software products with complex instructions and promotional copy. The copy gives information in retail environments where no trained help is available to answer customer questions.*

of other considerations.

But different functions within a company do have different priorities. While cost is purchasing's top consideration, marketing needs vendors that can execute innovative designs and print quality. A vendor's ability to do that may be essential to brand equity.

In some situations, the supplier may actually manage restocking and the supply chain. That could extend to collateral and other promotional materials. Arrangements that facilitate special situations may be necessary from a marketing perspective.

Being involved in vendor qualification at least lets marketers get their concerns onto the table during the qualification process. If those con-

cerns are not expressed, then marketers may have no choice when an effective package actually needs to be done.

## 2. Organize for early involvement.

When a product development project is done one step at a time, the packaging supplier is usually brought in late, when everyone is pushing a deadline.

That can work for more conventional package configurations, but conceptual or innovative designs need more time for creative input. Making the packaging supplier part of that process and bringing the supplier in as early as possible builds in that time. CONTINUED ON PAGE 34

## FOLDING CARTON INNOVATION AIMS AT MARKETING NEEDS

Several techniques developing with folding cartons will improve shelf impact and consumers' interaction with the product.

**Coatings** that provide increased gloss. With the emphasis on shelf impact, folding cartons are responding with coatings that have more solids for printed cartons.

**The natural look** connects with consumers now. Consumers think of it as "brown" paper, and carton suppliers call it virgin natural kraft. The ability to put contemporary graphics on such materials is often mandatory to project a brand image.

**Interactive packaging** allows consumers to actually play with the package at the point-of-purchase. Adding extra panels to the carton allows consumers to interact



are trying to achieve.

Creative packaging often needs to effectively answer questions such as: Will consumers want to touch the product? Should the package help consumers reach a comfort level with the product? Can the package reward consumers' expectations by performing well each time?

Often, design briefs or other project management documents express the marketers' judgments and vision

for the product. Those expectations need to be shared with the packaging supplier because they may shape the supplier's response on how to achieve those expectations.

### 4. Supply product samples.

Resist the temptation to just give the supplier only the product's dimensions and the number of units that will go into a package. Provide samples.

CONTINUED FROM PAGE 52

### 3. Share design criteria.

With a creative package, the concept may include qualitative judgments of the shelf impact marketers

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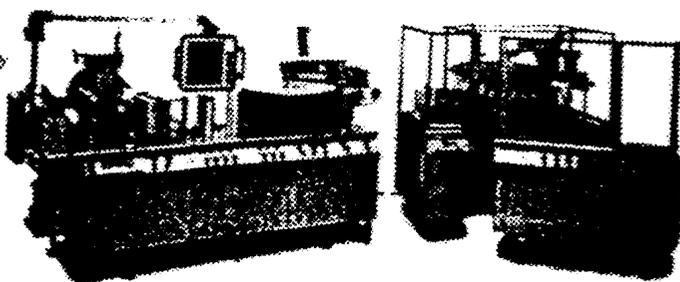
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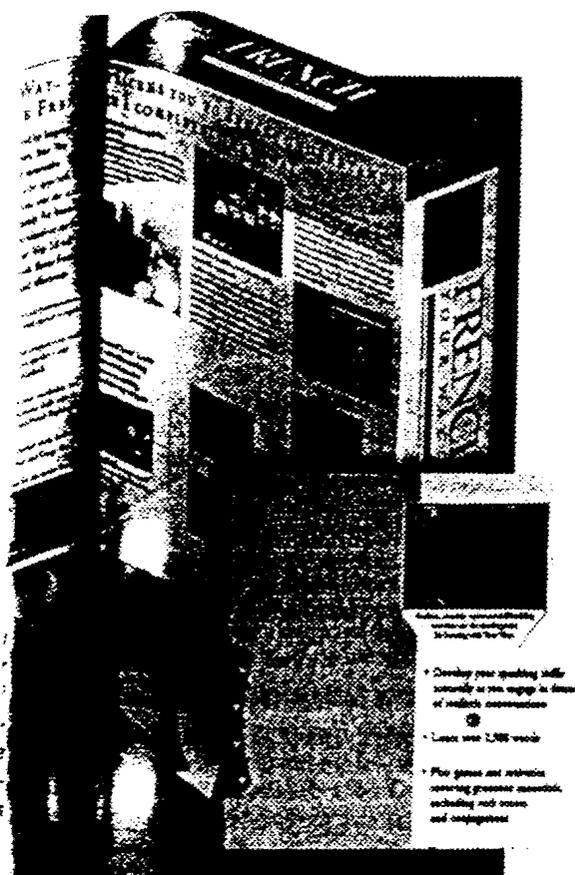
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on how to differentiate—if the supplier knows the competition.

Give the supplier samples of competing products. Also provide photos or representations of shelf arrays used in developing the graphic design. If you have planograms for the category, show those to the supplier, too.

#### 6. Develop graphics and structure simultaneously.

A strong brand image strives for harmony between the brand messages, the product and the packaging.

The structural package designer needs to understand how the graphics express those messages so that the packaging materials, structures and special effects can support each other to enhance the end result.

#### 7. Insist on documentation.

A supplier's quote based only on quantity and package style can signal a "commodity" shop approach that does not accommodate creativity well.

If you are looking for something beyond that, work with a supplier who provides details on the package—dimensional drawings that indicate tolerances in finished packages.

The supplier should also ask for details on the product's goals and end-user benefits. And the supplier should ask about production settings, for example, would packages be assembled in a hand-capped workshop?

## REFERENCE BOOK UPDATES FOLDING CARTON DESCRIPTIONS

A 1999 revision of the *Handbook of Folding Carton Style Nomenclature* updates the publication's earlier versions.

The book is expanded to include additional carton styles, an introduction to carton design and manufacturing process, and a glossary of packaging terms.

It includes information on carton materials including small-flute corrugated board. It looks at environmental and regulatory aspects of folding cartons, and it details carton styles.

#### Where to go for more information...

► *Ordering information on the Handbook of Folding Carton Style Nomenclature.* At the Paperboard Packaging Council, contact Peter Eberts at 703/836-3300 or by e-mail: [ppcmail@perois.com](mailto:ppcmail@perois.com)

#### 8. Test and audit package performance.

Get prototype packages from your supplier to test internally. Prototype can be used in focus groups to get feedback on packages.

Use them. CONTINUED ON PAGE 17

Without samples, the structural designer is left to guess about product visibility or nesting opportunities. And fit differences may happen between prototypes and production samples.

#### 5. Describe the competition.

Brand differentiation is a key in today's sea of competing brands and products. A supplier can offer ideas

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CONTINUED FROM PAGE 55

to check the effectiveness of the overall design, the ease of use, the ability to dispense product, how they deliver product visibility and graphic integrity. Ask the supplier about product protection or fitness for use.

But the marketer has to evaluate any supplier suggestions against the marketer's knowledge of customer preferences. Customers may think they need a sturdier carton than a supplier recommends, and a marketer has to evaluate the different opinions.

**9. Establish a relationship with the supplier's staff.**

The supplier is going to be part of the team, and you need to know the key players on the supplier's side.

**Where to go for more information...**

**Folding Cartons. At Flour City**  
For more information, contact Nancy Mosman at  
630-377-2100 or by e-mail:  
nmosman@flourcitypack.com

One person to know: the prepress supervisor. That person's quick review of a computer disk, for example, could save hours of resolving issues and delays. Look at the fit between the supplier's staff and your own.

**10. Understand process potentials.**

Your supplier can be an educational resource. Technology is changing in folding cartons as it is in many areas, and the supplier should be a resource in letting you know what changes can benefit you.

For example, miniflute corrugated containers—F, G or N flute—has enabled direct printing without the need for printing labels for lamination. Packages with high-end graphics are now replacing older types of



Cartons that hold bottles of the Traveling Herbalist brand have the "brown box" feel that addresses consumers' interest in "natural" products.

corrugated packaging.

Other techniques such as cold embossing and foil stamping offer marketers added shelf impact and affect brand image.

Your supplier needs to show you how improved capabilities such as these can help your brands. ■

**INDEX OF ADVERTISERS**

- Ampersand Label, Inc. . . . . p. 21
- Berlin Packaging . . . . . p. 26
- BRANDRESOURCES . . . . . p. 53
- CCL Label . . . . . p. 10
- Clariant Masterbauches Div. . . . . p. 44
- Cloud Corp. . . . . pp. 4-5
- Do-It Corp. . . . . p. 45
- Dow Industries . . . . . p. 42
- Duralam Inc. . . . . p. 24

- Independent Publishing Company . . . . . p. 61
- Inland Container Corp. . . . . pp. 4-5
- Ivy Hill . . . . . p. 44
- Lithotype, Inc. . . . . p. 9
- Mead . . . . . p. 14
- Milliken Chemical . . . . . p. 42
- Mingrip/Zip-Pak . . . . . p. 7
- Mobil Chemical Films . . . . . p. 51
- Placius . . . . . p. 18

- Portlatch Corporation . . . . . pp. 30-31
- Reed Exhibition Companies . . . . . p. 41
- Sequist Closures . . . . . p. 53
- Scharwk . . . . . Inside From Cover
- Smyth Companies . . . . . p. 36
- Sonoco Products . . . . . p. 28
- Tenneco Packaging . . . . . p. 33
- Xelapak . . . . . p. 23

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## 2 EXTENDING SELL COPY

Rexall Sundown's herbal supplements have to address knowledgeable consumers who want more information about the products. And like many marketers, the company had only a confined, fixed package area to present all the information.

With its Sundown Herbs, the company opted for what it calls the "Twist 'N Learn" label. The technique uses two labels in one, with a rotating window to highlight four different copy segments about the product.

The technique addresses savvy, health-conscious consumers who want to know about the product. Research showed that two-thirds of herbal users consider it very important that label information specify the particular benefits which herbs can offer.

The label has two layers. The bottom one wraps around a bottle, and an adhesive holds it to the container. The top layer rotates around the bottom layer. As it

rotates, a window in the top layer reveals segments of copy on the layer underneath.

Rexall Sundown uses the label to highlight four types of information that promote product usage and cross-sell other products in the line. Copy segments on each package are:

- A product description
- An explanation of product benefits
- Suggested additional nutritional supplements to complement the product
- How to learn more about Sundown Herbs

CCL Label developed the label. Rexall Sundown uses it on more than 50 different varieties and strengths of herbs.

As a promotional tool, the label has become a "star" on the company's Internet site. Check out [www.raxallsundown.com](http://www.raxallsundown.com) to see how it promotes the labeling feature.



"Twist 'N Learn" label appeared on Sundown Herbal products in February to give consumers more product and cross-selling information.

### Where to go for more information...

► *Spinformation label*—At CCL Label contact Christine Scheerer at 847/384-2643 or e-mail [cscheerer@ccllabel.com](mailto:cscheerer@ccllabel.com)

## 3 HELPING CONSUMERS "TASTE" IT ON THE SHELF

Consumers are serious in wanting to connect with the products they buy. At the store shelf, they want to see it, touch it,

smell it—even taste it.

Clear labeling is a tactic that begins to answer those needs. In reducing the perceived barrier between product and consumer, clear labels on clear packages have produced significant marketing successes in personal care products and wines.

But what about foods?

Consider foods with high appetite appeal in the package. Both pasta sauces and salsas meet those criteria. For many brands, the product is positioned as being "rich" and "chunky." Clear labeling could enhance that positioning by highlighting the sauce or salsa.

Graphics on clear labels can support that positioning in two ways:

First, labels that rely on typography and line art in a minimalist approach let the product inside the container do almost all the work of projecting appetite appeal. The product itself has to strongly

convey appetite appeal.

Or in an alternative approach, reproductions of the fresh vegetables that go into the sauce or salsa stand out on the label. The product is still the "star," but the graphics augment the appetite appeal.

### Where to go for more information...

► *Clear labels*—At Spear Inc., contact Dan Muenzer at 513/455-3223 or e-mail [dmuenzer@spearinc.com](mailto:dmuenzer@spearinc.com)



Sutter Home pasta sauce is on the leading edge in using a clear label to highlight the product's appetite appeal. The labeling concept builds on Sutter Home's success with clear labels for wine.



Gatorade's ergonomic bottle helps athletes "get a grip," but complicates the labeling challenge.



## 4 HIGHLIGHTING INNOVATIVE SHAPE

With package designers molding hand grips into bottles for almost every conceivable category, the labeling challenge multiplies.

Here's one of the most severe challenges—Gatorade's new ergonomic bottle. It has a series of grooves molded into the bottle, letting athletes firmly grip the container. A deep groove near the bottle's top accommodates the thumb and forefinger.

It gives the consumer a tight grip on the bottle, but it requires special labeling efforts to get the label to smoothly conform on the deep indent.

Gatorade's answer is a PVC shrink label. Printed in eight colors, it deliv-

ers visual impact. And it centers on the deep groove.

The secret to good appearance lies in a labeling process that uses a sophisticated heat tunnel to shrink the label onto the bottle. The tunnel has multiple heat zones in it, ensuring that the label conforms well to the visually striking bottle.

Labeling technology such as this will become more prevalent as the trend toward striking shapes continues to grow in beverage packaging and makes it tougher to get the label right.

### Where to go for more information...

► **Shrink labels**—At Uniflex Corp., contact John Yamasaki at 714/865-4040 or e-mail: [yamajohn@worldnet.att.net](mailto:yamajohn@worldnet.att.net)

## 5 REVVING UP GRAPHICS "HORSEPOWER" RACE

Dean Foods breathed life into what was a dying category with its Chug milk. The branded product added convenience and pushed sales upward. Now, the number of dairies emulating the packaging style is exploding.

Among them, Smith's Dairy in Orville, Ohio, with its Mooovers brand. The packaging approach taken by this dairy signals a graphics "horsepower" race that may make the dairy case among the most colorful in the grocery store.

If you are in this section of the grocery store, be ready to join the crowd, or get left behind.

Trade dress for the Mooovers brand is anchored in a "swirl" pattern that uses a background color to color-code the variety. A "swirl" of a complimentary color adds a sense of motion to the label.

Color coding identifies varieties such as whole milk, half-and-half and chocolate milk. Packages come in 8-, 16- and 32-ounce sizes. The 8-ounce packages

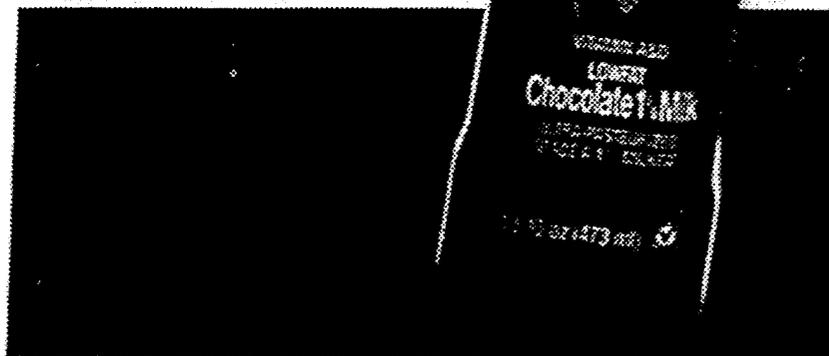
come in a plastic carrier to create a six-pack.

Smith's Dairy opted for a PET bottle that is tinted brown. The tinted bottle blocks out the ultraviolet light that can deplete milk of vitamins and flavor.

Smith's Mooovers are in Midwestern markets.

### Where to go for more information...

► **Shrink labels**—At Seal-It, contact Barbara Drillings at 800/325-3965 or e-mail: [sealit@sprynet.com](mailto:sealit@sprynet.com)





The Chicago Tribune increased circulation through targeted convenience stores with a scratch-off promotional game.

## 6 ADDING PROMOTIONAL IMPACT

What can happen if you think of a newspaper as a packaged product?

That's what the *Chicago Tribune* did when it wanted to increase its circulation through convenience stores. It added a scratch-off promotional label to Sunday editions sold through the White Hen Pantry convenience stores in the Chicago area.

The promotion ran four consecutive Sundays. A three- by four-inch, pressure-sensitive label was applied to each paper's upper right-hand corner.

Each week the promotion offered a major prize—typically a trip or a weekend hotel stay. Instant winners include coffee at the convenience store.

The label was designed not to detract from the paper's appearance. The scratch-off label could be completely removed from the paper with a dry-release. Readers could see the newspaper through the clear base that stayed on the newspaper.

Regional delivery agencies actually applied the labels to the papers.

### Where to go for more information...

► **Shrink labels**—At Superior Label Systems, contact Todd Astendorf at 513/459-2400 or e-mail: [promo@superiorlabel.com](mailto:promo@superiorlabel.com)

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# EIGHT QUALITIES THAT SEPARATE GOOD PACKAGING FROM GREAT

*Great packages—they're obtrusive, they differentiate, they have soul and personality. Integrity and synergy are other factors that make packages stand out.* BY THOMAS PIGEON AND CHRISTIAN PICKETT

It used to be that a package's main function was to protect the product inside. Today, in the world of brand marketing, the package has emerged as the fundamental communication element of both a brand's existence and its essence.

The quintessential package design strategy employs an equitable balance of left and right brain, weaving magic into the life of otherwise inert, generic products and converting them into consumer-relevant financial properties for their owners.

Every brand has a different communication and design strategy, but there are eight basic ingredients that a package must possess to be truly great.

**1** It must be obtrusive. To succeed, a package has to break through the visual clutter. The overwhelming selection in North American supermarkets and retail stores now leaves the average shopper with the delightful task of choosing from about 18,000 products during an average shopping experience.

If a brand is to be considered, it must first be seen. And this need not necessarily be achieved by using fluorescent orange packaging. The Japanese approach of "whisper to be heard" can often be highly effective as an obtrusive packaging strategy when employed in contrast to a high colour-saturated retail environment.

For example, Visine breaks through the visual clutter with a "whisper" approach in an environment where most competitors use blue packaging. Visine uses predominantly white packaging with colour accents, reflecting each variety.

**2** A great package always differentiates. It's one of the hallmarks of a successful brand. That ability to stand out on shelf can be delivered via the communication of a

functional "unique selling proposition" (USP) or through a perceptual point of difference that answers the consumer's question: Why should I buy this brand?

This doesn't just happen with a nice piece of typography and a Pantone colour system. Bengay is a good example of a subtle but efficiently communicated USP. The distinctive "vapour background" readily

things of ourselves in it, we establish an emotional connection, we feel good about it—or we don't.

In contemporary marketing terms, the soul of a product is its "brand essence"—the unique difference that the brand represents for the consumer.

The depth of a brand's soul is manifested in its trade dress design system, when we see the Campbell's



*A great package has to be obtrusive. But it can do that by "whispering" as Visine does. Great packaging communicates the "unique selling proposition" (USP). The vapour background quickly differentiates Bengay from the competition.*

identifies Bengay from the competition. Without this distinguishing icon, Bengay might not be noticed by a potential new consumer and would have to rely on those loyal to the brand.

**3** A great package has to have soul. The package is the window to the soul of the product, and a quick look at it lets us know what's inside. In a split second, we identify with it, we recognize some-

can—which incorporates red and white graphics, calligraphic lettering, and appetizing photography—the inert liquid in the bowl is magically transformed into the dependable nurturing experience of Campbell's.

**4** A great package also has great personality. A package stripped bare of graphics and colour is simply a container, an object. Add graphics and colour and the package becomes CONTINUED ON PAGE 50



*Campbell's communicates its product's soul through calligraphy and appetizing photography.*

*Danone Delisse Yogurt displays the personality a great package needs. It says, "I'm fresh, I'm good, I'm different!"*

*The Green Giant icon speaks strongly of the brand in any language without the need for words.*

*Dentyne Ice maintains the brand's integrity in a line extension—which translates into great packaging*

CONTINUED FROM PAGE 59

animated with its own voice and look.

A great package has life and personality that creates excitement, that evokes and provokes, and thus dynamic shelf-appeal moves and inspires us to buy. Danone Delisse Yogurt is a great example of a product that creates excitement on shelf by saying "I'm fresh, I'm good, I'm different!"

There is no doubt that Danone is a leader in the category, because its brand persona is effectively communicated through its packaging.

**5** A great package must have its ownable and original real estate.

In a world of high illiteracy and in a country with increasing ethnic diversity, symbols, icons and visual elements such as a rooster, a bald man with an earring, a pudgy doughboy, a Quaker or a tall green giant speak strongly in any language.

**6** A great package must also be singly focused. Picture a typical shelf, with all the noise, all the clutter, all the shapes and all the sizes. What stands out is the package that looks and speaks with a single voice. A simple package makes a very clear visual statement. It also makes it easier to capture the shopper's attention.

The marketing and design industry's overzealous willingness to please tends to produce packaging communication with mixed messages and garbled communication that will always sink in a sea of visu-

**Where to go for more information...**

► **Design Services.** At the Thomas Pigeon Design Group, contact Christian Pichette, 514/871-1322 or e-mail [tpigeon@tpdg.ca](mailto:tpigeon@tpdg.ca)

al anonymity. Single-minded packages like Visine and Campbell's are brand testimonials to this higher action standard. In great design, less is more. A great package is inextricably linked to its advertising alter ego.

**7** Communication synergy is the hallmark of successful products today. Any ad, whatever the medium, plants an idea in the consumer's head that may be acted on tomorrow, next week or next month.

A great package reinforces that idea by looking the same on the shelf as it does in the ad. The ad may bring the shopper into the store, but the package in the store is the link that closes the sale.

A great package is one that works in partnership with the advertising media. The "good morning" feeling of the Eggo package's sunburst connects with its advertising theme. The package's unique wordmark and colour serve to reinforce the "good morning" message of its advertising.

**8** The final quality that makes a package great is one that also makes a person great—integrity.

Package design is clearly one of the most powerful tools in a marketer's arsenal. Where a brand's equity is leveraged against a line extension, integrity can mean the difference between success and failure.

Dentyne Ice is a great example of leveraging the brand "Dentyne" with a new offering called "Ice." Yet, while Dentyne Ice is clearly different from the original, it retains the brand's integrity.

However, retail purchase and the ultimate win of product loyalty is

*A great package develops communications synergy—it looks the same on the shelf as it does in the ad. Eggo's sunburst on the package connects with the "good morning" feeling in ads.*

achievable only when the brand's epidermis creates an expectation which is met by what's inside the package.

Overpromise and say good-bye to future sales. Underpromise and you won't get picked off the shelf.

The ability to balance these realities in a dynamic and complex retail environment is the acid test for successful package design.

The road to successful package design is replete with many a bump and detour. The adherence to these few, relatively simple principles for great packaging will ensure that the brand hits the road dressed for success. ■

The authors, Thomas Pigeon and Christian Pichette, are CEO and President, respectively, at Thomas Pigeon Design Group Canada Ltd.—a package design and brand identity firm.



# IMAGE COUNTS

*The success of products in new forms of packaging depends on whether consumers will accept the new package and product image.* BY ROBERT McMATH

Just a few years ago, it was virtually impossible for brands well known in one category to extend into different categories. Gillette tried to extend its Good News disposable razor line into shampoos, after shave and deodorant. The association with the disposable razors just didn't work. Disposable razors—OK! Disposable toiletries—no way!

But marketers kept trying. And consumers finally accepted some pretty long stretches in lines where the manufacturers poured large sums of money. Many brand extensions, quite far from their original item images, have done well in recent years.

Jell-O out of the dry mix box and into the ready-to-eat dessert and yogurt categories is a notable example. Certainly frozen dinners into some 463 extensions from ConAgra's Healthy Choice.

## But new packaging forms?

The ability to extend brands into new categories may have become a reality. However, it still remains difficult—if not almost impossible—to extend packaging or product images, which are strongly planted in the minds of consumers in one form, into new forms.

In 1984, Block Drug Co.'s Efficol Cough Whip in a wide-mouth jar made its debut. It offered a cough suppressant and decongestant "For Children and Adults" in a "No-Spill Formula." As a pink-colored whip in an 8-ounce plastic jar, it came complete with a measuring teaspoon.

But it was hard to dislodge the foam from the spoon as one tried to get the child to take the medicine. You can't image a child's hands in front of the face, head moving back and forth to avoid taking the medicine.

This same "hard-to-spill" benefit was offered to adults. In 1986, Ez-Cal Soft Calcium Whip came from Health From the Sun Inc., Needham Heights, Mass. It offered "High-Level Calcium Without Swallowing

Giant 'Horsepills.'" Just after that, Extra Strength Maalox Whip Antacid from William H. Rorer Inc., Ft. Washington, Pa., also entered the market.

Both were in aerosols, and were dispensed as white whips. Would-be consumers immediately conjured up images of whipped cream in aerosols. That connoted topping for desserts, pies, cocoa, etc. Consumers couldn't reconcile a dessert-topping image—either white or pink—as a form of medication?

Even an upscale presentation of an aerosol Chocolate Mousse in 1988 couldn't get past the consumer association of plain old whipped cream. Consumers couldn't see paying around \$5 for an aerosol—even if you colored it brown and gave them eight ounces that represented six servings of rich chocolate dessert.

## No gourmet aerosols

It was sold refrigerated as an "All Natural Gourmet Dessert" by Gourmet International Foods Inc., Chicago. But consumers had never considered an actual dessert dispensed from an aerosol, sold from the dairy case, and for \$5 at that!

The coffee brick packs are another packaging form that has not translated across product categories. Consumers did not take well to Texmati's brick pack of rice in a vacuum package.

Narrow package association barriers may break down in the future, but it is going to take a great deal more investment on the part of the daringly innovative product manufacturers to gain eventual success. ■

*The author, Robert McMATH, has been a marketing consultant for more than 30 years. Through his New Products Showcase & Learning Center, he has advised major companies. He is the author of What Were They Thinking?, a book chronicling the why's of product successes and failures.*



# SPECIAL EFFECTS HEIGHTEN SHELF IMPACT

*Used right, iridescence and pearlescence go beyond promotions. They can reinforce a brand's identity and define products through packaging.*

**T**hey shimmer. They sparkle. They add luster and depth to bottles, cartons and labels, and they differentiate brands on store shelves. "They" are special effects, most commonly called iridescent, pearlescent and metallic "looks." They are no strangers to packaging, having propelled many a brand through a promotional cycle.

## **PACKAGING THAT SELLS™**

But the emphasis on shelf impact may be increasing their value as a long-term packaging strategy.

Used creatively, these effects play a significant role in differentiating brands, especially those in health and beauty care categories. But they also can differentiate automotive additives, and may offer an extra edge in categories such as nutraceuticals.

The creative challenge in using these effects is complex because it goes beyond a color decision. And iridescent and pearlescent materials themselves have multiple variables that have to be integrated with other package components.

Here's an example:

Laminate an iridescent film to a smooth carton, the look can be luxurious. However, emboss the carton's surface, the same



*Helene Curtis' Thermasilk line relies on pearlescence to emphasize the product's benefit and set it apart from other hair care brands. The effect has a cosmetic look and also suggests the heat-activated formulation that delivers consumer benefits.*

iridescent film can produce a high-tech look.

### **Reflecting the product inside**

Like many other packaging techniques, the appeal of pearlescence and iridescence lies in their ability to communicate product attributes.

Helene Curtis, for example, uses a pearlescent packaging theme for its Thermasilk hair care products. The image supports the product's benefit—its performance as a heat-activated hair care formulation.

Notes Sky Underwood, Director of Creative Resources for Helene Curtis, "We did market research on the pearlescent bottle and consumers told us they knew the product would give them healthy hair. The bottle adds to the premium image of the product."

While bottles for Thermasilk exhibit sheen, for other products pearlescent pigments can add a metallic look. For example, the look could emphasize the benefits of a car wax.

Pearlescence results from the inter-

action of light with mica flakes within a plastic. Iridescence has a similar look, but it results from the interaction of light with hundreds of microscopic layers within a plastic film.

These effects can be created in several packaging forms. They can be done in plastic bottles and components such as caps. But they also can be executed on paperboard cartons, on labels and on plastic films.

Here's how they work in several packaging forms.

**Plastic bottles:** Mica pigments are blended into the plastic before the bottle is molded. Getting the look right is more art than science, and the bottle-making process itself significantly influences a bottle's final appearance. In simplest terms, you may not know exactly what a pearlescent bottle will look like short of making one on production equipment.

One way to do that is to use a prototyping facility such as the one that M.A. Hanna Color operates at its Suwanee, Ga., research center.

Within its facility, the company has a blow-molding machine for limited, prototype runs that shows the actual visual effect you will get with different sizes of mica pigment and different concentrations within the plastic.

According to David Bates, Manager of Marketing for M.A. Hanna Color, major factors that determine the appearance include:

- The colorant used in the resin along with the pearlescent pigment.
- The size of the mica particles themselves. Pigments with smaller mica flakes produce a hazy sheen, but a larger sized flake creates a metallic look.
- How much of the pearlescent pigment is used.
- The bottle's shape.
- The number and composition of layers in multilayer bottles.

Bates expands on some of the characteristics, saying, "I think a round bottle has more shelf impact because of the way the light reflects off the pearl pigments. A flat surface looks different."

To assess a shape's effect, M.A.

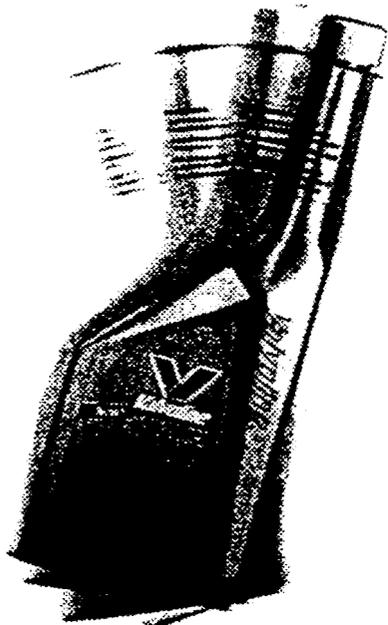
Hanna Color has a mold specifically designed to compare different shapes. It has a flat surface on one side and a rounded contour on the other. Since the complete bottle is blown from the same blend of plastic, colorant and pearlescent pigment, it shows just what the shape itself contributes to the visual effect.

The prototype replaces a traditional approach to visualizing how a pearlescent bottle would look. In that approach, a mock-up is hand painted. However, the approach, at best, approximates only the appearance of a finished container.

"The pearlescent effect is a good example of what is true in one medium many not be true in another," says Scott Russell, Vice President of Technology for M.A. Hanna Color.

For example, bottles are more often being made with multiple layers of plastic. That helps keep costs down by using the more expensive pearlescent pigment only in the bottle's outer layer. With the prototype bottle, designers can actually see what a multilayer bottle looks like.

Such prototyping may be particularly useful in developing PET bottles as this material sees wider use in packaging. With its higher gloss, PET can offer advantages on the shelf. The prototyping step gives designers an opportunity to see what the combina-



*Valvoline uses pearlescence in bottles for automotive additives. Custom inks on the labels match the bottle's color and luster.*



*One answer to seeing just how a pearlescent pigment will look is this prototype bottle made by M.A. Hanna Color. The effect may look different on round and flat surfaces—the bottle includes both.*

tion of gloss and pearlescence yields.

Finally, notes Bates, the prototype setup records factors, such as mold temperature and the thickness of different layers within the bottle. Those readings can translate directly into the full-scale production process, ensuring that production bottles look like the prototype.

Cartons and labels. Special effects can be added to cartons and labels in two ways:

One way is to laminate an iridescent film, such as Engelhard's Aurora material onto a carton or label, adding a multicolor shimmer to the package's entire surface.

The design challenge is to coordinate the film with the paper's characteristics and surface design to achieve a specific look.

For example, iridescent film laminated to a white paper looks different than film laminated to colored or black paper because of the way light reflects through the film and from the paper's surface.

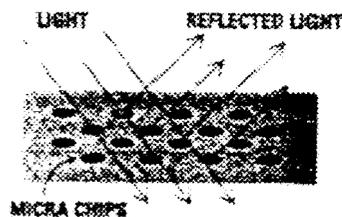
Surface decoration on the film also alters the visual perception. Hot stamping or printing over the film with opaque inks can make the iridescent effect seem more intense.

Use of transparent inks modifies the iridescent film's apparent color.

As with other techniques such as holograms, the secret in making a

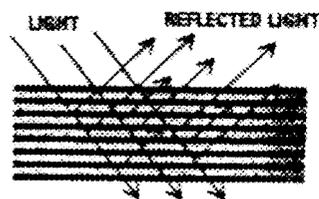
## HOW IT WORKS

The terms pearlescence and iridescence describe special effects, and here is how each works:



**MICA CHIPS**

*Pearlescence* results from microscopic-sized mica flakes within a plastic material or a printing ink. Light reflects off the flakes producing the effect's luster. The size of the flakes, their color and their orientation within the plastic material produce different effects. Metallic effects include gold, silver and copper hues.

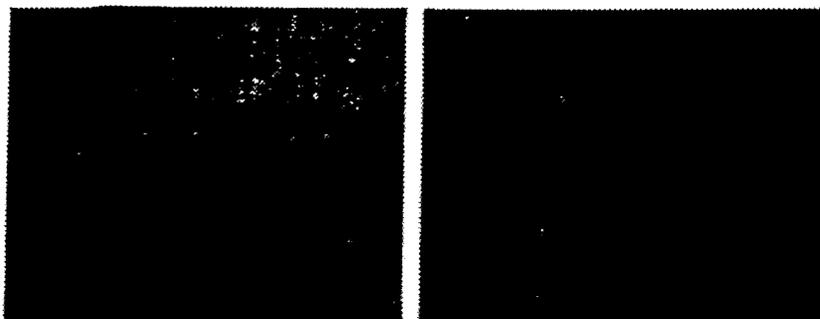


*Iridescence* results from light being reflected and transmitted within multiple layers of a plastic film. The reflected and transmitted light waves also interact with each other, creating the characteristic visual effect. They may shimmer in blue and green or blue and red hues.

The illustration shows just a few layers of a multilayer film such as Engelhard Corp.'s Aurora iridescent film. Films can have as many as 225 layers.

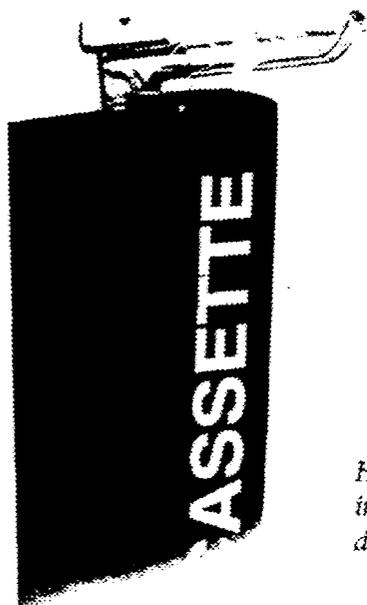
design work may lie in using opaque inks to cover much of the film, allowing the pearlescent or iridescent effect to show through as a highlight.

The second way to add pearlescence to car- CONTINUED ON PAGE 2



An iridescent film looks different depending on the paper underneath. Embossing and changing the paper's background color (on the left) changes the visual quality imparted by the film.

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CONTINUED FROM PAGE 23

tons, boxes or bags is by printing with pearlescent ink.

"The pearlescence is a nice effect, and on the shelf, it is a point of difference compared to standard non-pearlescent inks," says Lee Sucharda Jr., President of Design North. "In using it, you have to remember that it works well in solid areas—not as a screened color."

But if you're printing a label or a carton with a pearlescent pigment, you have to consider the printing process.

For pearlescent pigments, screen-printing accents optical properties, because the technique lays down relatively heavy layers of ink. The printer becomes part of the design process early because factors such as screen size and plate making have to accommodate the pigments.

**Flexible packages.** Many pouches already are composed of several layers of film, and an iridescent film as the outside layer creates a defining feature.

**Thermoformed containers.** Iridescent film can be laminated to heavier gauge thermoforming films, permitting uses in thermoformed inserts and blisters. Those package components could be used as platforms in containers for beauty aids. ■

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# "BIG" ISN'T NECESSARILY BETTER

*When a big package takes up too much shelf space—either at the store or in the home—it's a "no-win" situation.* BY ROBERT McMATH

For several years, manufacturers have experimented with brand extensions based on size. Oreos were miniaturized after years as "America's favorite cookie" in a regular size. One could "eat 'em by the handful." Then Nabisco made extra big Oreos.

And, of course, manufacturers have played around with package sizes, often to gain more facings on the retail shelf. More shelf presence offered more visibility, and more visibility appeared to offer more sales.

Retailers, however, caught onto this ploy and have been cutting back on the number of sizes in particular categories. With new planograms, retailers claim overall sales have not been hurt even when fewer sizes are displayed.

Sometimes manufacturers get caught up in their own hype and excitement about the overall concept, and forget that size does have its limitations. Bigger (and thus more presence) does not necessarily mean better.

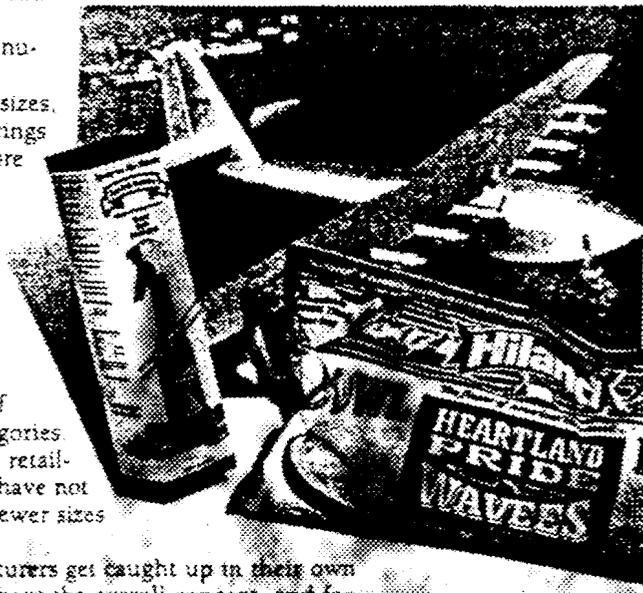
In 1993, Hiland Potato Chip Co. offered a good example of "bigness" that didn't work. It was almost a perfect example of a packaging innovation in search of a product. The company put Heartland Pride Waves edged potato chips in a 20-ounce bag with a resealable Fresh Trak™ zipper on the long side.

The company called it the "Bowl Bag". The graphics were printed to properly display the Bowl Bag on its long side—taking up the shelf space of two regular, upright potato chip bags.

It did stand out on the shelf. It was twice as wide and half as high as other potato chip packages. But it took up twice as much shelf space for half the sales potential. And it took up twice as much shelf space on the consumer's pantry shelf.

Plus as a concept, did consumers, except on rare occasions, want to use the bag as a bowl from which to offer potato chips to friends and family? Perhaps at "tail-gate parties" before a football game or at a picnic, which was extremely limiting seasonally and opportunity-wise.

Store buyers said "no way" for display on their shelves. And consumers echoed that for storage on their pantry shelves. The package simply didn't fill consumers' needs.



"The Brushless Baste" BBQ Buddies' Original Spray Glaze® was another example where size didn't work. The barbecue sauce came in a 12.5-fluid ounce bottle and in six flavors.

It offered "The Answer" to messy pans and brushes that marinating and basting always left behind. It was a brand-new spray-on barbecue glaze for steaks, chicken, etc., that was specially formulated to give the foods barbecue flavor without the mess.

The bottle came boxed with a trigger sprayer inside ready to be attached to the bottle for use. But the box containing the capped bottle and the sprayer was

about 18 inches high. It offered a big, tall presence on the shelf—except that it would not fit on the shelf in the supermarket barbecue sauce section. And it did not fit on the pantry shelf waiting for its first use at home.

Furthermore, once the sprayer was attached it was even taller, and after the product was opened, it had to go into the refrigerator. But it wouldn't fit on a refrigerator shelf, even where large milk and soda bottles normally are stored. It just didn't fit in the refrigerator in a convenient place.

We thought the idea of this product was great—convenience for the would-be barbequer when "convenience" was in its early stages of gaining interest among consumers. But what BBQ Buddies provided in convenience of use, it lost in inconvenience of storing. Chalk up another lesson of "bigger was not better".

*The author, Robert McMATH, has been a marketing consultant for more than 30 years, advising major companies through his New Products Showcase & Learning Center. He is the author of What Were They Thinking?, a book chronicling the why's of product successes and failures. Contact him at 607/277-4053 or by e-mail at [mcmath@showlearn.com](mailto:mcmath@showlearn.com)*