

Reliable figures for
future-oriented decisions.

Packaging: as important as the product within.

Our modern consumer society is no longer conceivable without packaging. Most products are packaged in somehow, be it beverages, food, cosmetics, furniture, building materials or industrial chemical products.

In 2007, for instance, 16.4 million tonnes of packaging were consumed in Germany, which comes to over 200 kg per inhabitant.

And so the tasks of packaging have changed. Packaging used to have a distinctive function: to reliably protect a certain industrial or agricultural product and to facilitate its transport. Today, packaging must also provide information, keep fresh, document the logistics process, convey an experience or even inspire in order to draw the attention of, for example, perfume buyers to the product.



GVM observes trends and documents whether they are successful and what significance they have for the world of packaging. This includes the development of the versatile filling goods markets as well as innovations in the packaging industry.

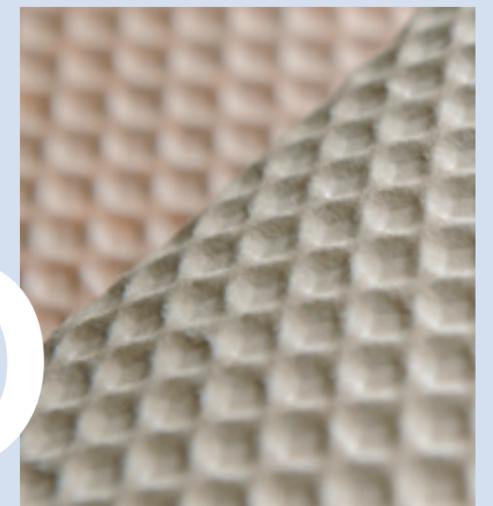
For example:

- RFID guarantees the originality of a brand or the freshness of food.
- MAP or intelligent packaging ensures that food stays fresh longer.
- Innovative convenience food requires packaging suitable for microwaves.

Without doubt, the **fascination** of the subject of packaging will gain further momentum in the future, as packaging must fulfil ever-changing tasks, and this constantly necessitates new or enhanced materials. GVM **documents** this fascination in a precise and convincing manner by means of figures which provide our customers with valuable information for their work.

Bees produce about 150 g of wax for their honeycombs, in which up to 2,500 g of honey are stored, i.e., about 60 g of packaging per 1,000 g of product. By way of comparison: the food industry requires about 20 g of plastic for the same purpose. Wax, however, is 100 % recyclable.

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No valuable data without the right conclusions.

An economic good as important as packaging tells us a lot about developments and trends in both industry and society. For example: Which packaging materials and sizes are used in the confectionery industry? Is the market share of packaging sizes for single persons growing? What is the utilization balance of packaging? You will spontaneously come up with more questions from your sector.

Individual foil packaging for dishwasher and washing machine tabs adds up to 1,500 t a year.

1,500



Data providing answers to these questions is often not accessible to our customers and sometimes too extensive to draw reliable conclusions.

GVM provides valuable and reliable decision-making support. GVM conducts surveys in three different sectors:

- Food
- Beverages
- Non-food

In doing so, GVM examines **material flows** of packaging and its **components** along the respective stages of **processing** and **use**:

- Development and manufacturing
- Use and consumption
- Return and disposal or recycling

These **issues** concern all economic levels:

- Individual markets and industries
- Individual companies
- General political conditions

Long-term observations – evaluations – forecasts.

GVM makes use of all modern market research methods for its **observations** and **analyses**. Interviews and store checks, sample purchases, extensive desk research and reliable evaluations provide a **decision-making basis** for politics, trade and industry. Where special issues are concerned, GVM experts form strategic partnerships with specialists from other fields.

GVM has created **databases** which cover more than ten years and are unique in Germany. These databases are the foundation of GVM's further tasks. They range from qualified **projections** and **analyses** for submarkets to

trend calculations, forecasts and the creation of entire **scenarios**.

GVM has gradually reached its unique position on the market. Its success is also based on the experience of its employees; many of them have been working for GVM for years and have expert knowledge in individual areas. This results in a widely acknowledged **competence** which goes far beyond the borders of Germany.

A wide network of personal **contacts** with decision-makers ensures an additional **transfer**

of knowledge and information which could hardly be more reliable.

Therefore, GVM is able to provide decisive support and advice on forward-looking decisions in its role as **independent** adviser:

by dealing with all aspects along the **value chain** of **packaging** and

by making valid statements within **market research** ranging from individual customer observation to an overview of the industry



203,340

203,340 records, 1,080 filling goods segments, 281 packaging materials, 278 types, 106 packaging segments, 43 product groups, 36 packaging material groups, 24 packaging stages, 15 material groups, 9 years retrospective, 8 employees, 2 managing directors, 1 team.





Independence in every respect is more than just a promise of quality.

One of GVM's main strengths is its **independence** of the economy, associations and politics. This independence is based on the fact that on the one hand its clientele is very diversified and on the other the GmbH (limited liability company) is solely owned by both managing directors. This ensures that GVM always gives advice in an **impartial** manner and forms opinions in a completely independent way.

This is highly appreciated by our customers:

- public sector and politics
- Packaging industry, mechanical engineering and bottling/filling industry
- Trade, disposal sector and disposal service providers
- Consultation and communication

Our clients come from virtually all sectors of the economy and society and are individual companies, associations and other institutions.



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Advantage of single-serve packaging: 700 ml ketchup in 20-ml single-serve packaging requires less plastic than standard 700-ml squeeze bottles.

A history with a bright future.

GVM's motto is to deliver **reliable figures for future-oriented decisions!** Under the management of Jürgen Heinisch and Kurt Schüler, GVM is perfectly equipped for the future and new challenges. This is guaranteed by our **employees' competence**, which represents a strong **constant** in development and for GVM's future.

This is why GVM plays a **leading role** in analysing and evaluating future developments:

➤ **Europe** will be gaining in significance as a **market** and also as a **legislator**. GVM's clients come more and more often from EU member countries and pose questions concerning both their own and foreign markets.

➤ **Trends** in industry and society are subject to ever-faster development cycles. GVM documents them promptly.

➤ **Advice and concept development** beyond borders. GVM will be present beyond physical and economic borders. It will increasingly foster exchange with other relevant research areas.

In over 30 years of activity, GVM has been able to acquire an enormous wealth of experience and develop unparalleled competence – which you, our clients, benefit from.

And of course we are eager and curious about the questions you will ask us tomorrow. Just call us or contact us by e-mail. We look forward to hearing from you.



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In the context of the Packaging Ordinance adopted by the German Parliament in 1991, the proportion of returnable packaging related to the total quantity of beverage packaging was fixed at 72%. This figure is based on research conducted by GVM.



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