

**PRODUCT POSITIONING PROPOSAL FOR ...**

# **ORNITHOLOGY HOT SAUCE**

**NOBLE DESIGN ... JUNE 15TH, 2012**

## **TABLE OF CONTENTS**

Section A: Project Overview

Section B: Competitive Environment

Section C: Market Segments

Section D: Materials, Processes, Waste and Energy

Section E: Supply Chain Analysis

Section F: Packaging Proposals

Section G: The Appendices

**SECTION A:**

# **PROJECT OVERVIEW**

## **PROJECT OVERVIEW ... HOT PEPPER SAUCE**

The history of Hot Pepper Sauce is somewhat scattered and tough to piece together. Some evidence suggests that it dates back as far as civilization itself and remains of hot sauces have been found at archeological sites around the planet. Otherwise, it is known that chili peppers were first cultivated in South America and thanks to the Portuguese, were being used all over the World within 50 years of Christopher Columbus' death.

The first modern "western" chili sauce on record was in 1807 in Massachusetts, but it wasn't until Maunsel White and soon after Edmund McIlhenny (of Tabasco fame) started producing pepper sauces in and around New Orleans, that they gained a foothold.

Today's commercial Pepper Sauces are diverse and reflective of the cultures in which they are made, but many still bear the stamp of those from lower Louisiana and the Gulf of Mexico. Also, a "Hot Sauce Renaissance" has occurred in the last 20 years, with small batch producers creating artful blends of chilies and whatever ingredients their creative minds can conceive. Thanks to the advent of concentrated "Capsicum crystals," today there are pepper sauces a million times hotter than anybody from Pre-Columbian American could have dreamed of.

## PROJECT OVERVIEW ... ORNITHOLOGY SAUCE

Miles Marnell is currently a lab technician at SUNY (State University of New York) New Paltz. A recently acquired position, he graduated from college only recently and has been selling meat at the local Greenmarket with his fiancée Becky for many years now.

Miles uses a technique for producing his hot sauce called UV pasteurization. Put simply, he makes the juice shelf stable using UV light to kill the bacteria rather than boiling it. While not a member of the raw foods movement, this technique (sometimes known as cold pasteurization) yields a fruitier, less processed tasting product and is very popular with small-scale cider producers.

Inclined to make the best product he knows how, Miles' sauce is gaining traction. He has no inclination to become wealthy or to take over the market from Tabasco, he just wants to provide his creation to the world (or maybe just New York State). Ornithology Sauce is regularly found in many Brooklyn Eateries, as well as for sale at his Fiancée's Greenmarket stall.

So far, Miles has sold every bottle he's made. To be clear, he's sold them quickly (aside from a fiasco with a certain well known restaurant) a lot quicker than he's been able to produce them. People are quickly becoming big fans of his hot sauce.

Miles' choice of the 5oz Woozy is understandable, given that the bottle is to hot sauce what the slim can is to energy drinks. It is, however, not necessarily the most eco-friendly decision for a container (or is it?).

The 5oz Woozy generally comes with a plastic cap and an optional Orifice Reducer (plastic insert which reduces liquid flow to barely more than a drip. Miles already prefers to bottle without Orifice Reducers, however, a bottle of sauce can easily be used up in a day from overdosing.



**SECTION B:**

# **COMPETITIVE ENVIRONMENT**

## **COMPETITIVE ENVIRONMENT ... INTRODUCTION**

The market for hot sauce in the USA is vast. Like beer it is at the forefront of a movement based on cottage industries producing low volume, high quality food items.

Also like beer, the market is led by large scale manufacturers creating a lower price point (often lower quality) item. These category leaders define the industry through a palatable flavor profile which affords mass-appeal. Essentially, each sauce has just enough spice, just enough acidity and just enough smokiness (etc.) for the mass market to which it caters. Sound funny? Think about ketchup, which has a couple of undisputed market leaders and virtually no competition. This is for much the same reason, but there are fewer ways to make ketchup than hot sauce or beer.

The independent sauce maker will likely choose the 5oz woozy bottle and stop there. After that, the sauce will usually be red because chilies are red. Then comes green or orange, but they are minor. Labels usually have a lot of white in them for contrast with the red. Put these visual attributes together and the store shelf ends up looking anything but spicy (pun intended).

The following pages are the results of a visual survey taken of product, packaging and placement. This is what we're dealing with, by the numbers.

## SUPPLY CHAIN ANALYSIS ... TABASCO SAUCE

Manufactured by  
**McIlhenny Company**  
**Avery Island, Louisiana, USA**

Founded  
**Avery Island, 1868**

Website  
**www.tabasco.com**

Primary Package  
**2oz (59mL) glass bottle** with plastic screw cap and paper labels. Surrounded by a **1.125" x 1.125" x 5.5" folded carton**. Also comes in 5oz and 12oz bottles in the store, plus .125oz and gallon sizes online.

Average Price  
**\$3.99**

### Back Story

In 1868, Edmund McIlhenny, created a fiery condiment from a mixture of aged ripe red peppers, premium vinegar and Avery Island salt. He called it TABASCO® Brand Pepper Sauce. One hundred and forty years later Tabasco is made in much the same way it was back then except now the aging process for the mash is longer – up to three years in white oak barrels. It is still made on Avery Island, Louisiana, and the McIlhenny Company is one of the US's biggest makers of hot sauce producing as many as 720,000 two-ounce bottles of Tabasco sauce each day.

### Market Share

The leader in the United States Hot Pepper Sauce market without flinching, is Tabasco. In 2007, Tabasco accounted for roughly 20% of the entire American hot sauce market. What's makes that even more impactful, is that Tabasco ranks 8th in sales volume! But, it's grip is loosening. With Frank's Red Hot and a combination of Mexican brands coming on strong, Tabasco is gently slipping from it's top spot.

### Sustainability

The McIlhenny Company engages in a myriad of sustainability endeavors, some of which are decades old.

While Tabasco is not organic, nor fair trade, tabasco peppers must be grown in high-end small and mid-sized farms, then harvested by a skilled labor force. This requires regular and aggressive capital financing, which has been handled by the McIlhenny Company until recently and is now overseen by the Dutch agriculture bank, Rabobank.

Also, McIlhenny (in a forward thinking act) planted and maintained a special grove of Japanese bamboo to start a domestic stock. This grove has been found and reanimated with the intent of gaining enough plants to feed the current US bamboo manufacturers market.



## COMPETITORS ... FRANK'S REDHOT

Manufactured by  
**Reckitt Benckiser**  
**Parsippany, New Jersey, USA**

Founded  
**Frank Tea and Spice Company,**  
**Cincinnati, Ohio, 1896**

Website  
**www.franksredhot.com**

Primary Package  
**5oz, 12oz and 23oz glass bottle** with plastic  
screw cap, paper label and plastic shrink top.  
Also comes in 64oz in club stores.

Average Price  
**\$4.64**

### Back Story

Frank's RedHot dates back to 1918 when pepper farmer Adam Estilette partnered with Jacob Frank in New Iberia, Louisiana, to create a cayenne pepper sauce. In 1920, the first bottle of Frank's Red-Hot Sauce emerged from Estilette's pickling plant.

It is known as the primary seasoning in the first buffalo wing sauce, concocted in 1964 by Teresa Bellissimo at the Anchor Bar and Grill in Buffalo, New York.

In 1977 Frank's RedHot was sold to Durkee Famous Foods. Since the purchase of the Durkee brand in 1995, it is owned by Reckitt Benckiser. Frank's is produced in Springfield, Missouri.

### Market Share

Frank's Red Hot ranks as number 2 in the domestic hot sauce market, right behind Tabasco. With between 16 and 17%. The kicker is that Frank's is number 1 in volume share, with about 15% of the sauce in the US. However, it should be noted that Frank's claims 80% of their sales are to restaurants. Whether the category sales figure above was adjusted to reflect this isn't clear, but it may not have been as Frank's is a largely unknown brand outside of the Northeastern US.

### Sustainability

Frank's Red Hot has little in the way of sustainability to claim, but as a part of Reckitt Benckiser, it can go pretty far. Directly, all products owned by Reckitt Benckiser are engaged in a program they call the Carbon 20 initiative. Carbon 20 is the drive to reduce their entire company's footprint by 20% per dose based on a 2007 baseline. As of 2010, the company was up to 15%. They have also curbed factory energy use by 39%, water use by 17% and have a separate program that has planted 4.5 million trees between 2006 and 2011.

Other programs worth noting are their push toward safer workplaces, with reviews of indoor air and light quality, to factory accidents, which they are trying to bring down, with the motivator of increased work time and productivity. There are also medical and education programs intended to serve Reckitt's emerging markets and independent 3rd party guidance and monitoring of endeavors.



## COMPETITORS ... SRIRACHA HOT CHILI SAUCE

Manufactured by  
**Huy Fong Foods, Inc.**  
**Rosemead, California, USA**

Founded  
**Los Angeles, 1896**

Website  
**www.huyfong.com**

Primary Package  
**17 and 28oz plastic bottle** with plastic screw cap and screen printing.

Average Price  
**\$5.77**

### Back Story

Sriracha is made from sun ripen chilies which are ground into a smooth paste along with garlic and packaged in a convenient squeeze bottle. It is excellent in soups, sauces, pastas, pizzas, hot dogs, hamburgers, chow mein or on anything else to give it a delicious, spicy taste. Like all our sauces, we use only the highest quality ingredients and never any artificial colors or flavorings.

Huy Fong Foods has grown to become one of the leaders in the Asian hot sauce market. When Huy Fong Foods started business, it was producing, by hand, their first chili sauce: Pepper Saté Sauce. This particular sauce was developed by the company's founder. He was producing and selling this sauce

in his native country of Vietnam before he arrived in the United States. Eventually, he formulated four more chili products: Chili Garlic Sauce, Sambal Oelek (Ground Fresh Chili Paste), Sambal Badjak (Chili Paste with Onions), and finally, Sriracha Hot Chili Sauce, which is currently Huy Fong Food's most well known and best selling items.

### Market Share

There doesn't seem to be any information on the market share of the Sriracha on the internet, in print or elsewhere. So, after an exhaustive search, I called them to see what they had to say about it.

"We don't care."

That's the official answer from the company. They know their sales numbers, and they know that they're cornering the market on Asian hot sauce, but they "don't care" who's 2nd. Nor do they care how they stack up against Frank's or Tabasco. That says a whole lot about product dedication and integrity in my book.

### Sustainability

Huy Fong makes no claims at sustainability on it's low-key website. Interesting however is that their new factory, completed in 2011, has many state-of-the-art sustainable features and was built by a firm with LEED experience, though they didn't seek LEED certification. The factory was named best new industrial campus in Los Angeles.



## COMPETITORS ... CHOLULA HOT SAUCE

Manufactured by  
**Jose Cuervo S.A. de C.V.**  
**Chapala, Jalisco, Mexico**

Founded  
**Unknown (produced at least 3 generations before acquisition by Jose Cuervo)**

Website  
**www.cholula.com**

Primary Package  
**2 oz and 12 oz glass containers** with wood screw cap and paper labels. Also available in 64oz plastic bottles, and 7g single-use condiment packets (note: enclosed image is of a discontinued 5oz size bottle).

Average Price  
**\$3.59**

### Back Story

The hot sauce is named after the 2,500-year-old city of Cholula, Puebla, the oldest still-inhabited city in Mexico. The name "Cholula" is derived from the Nahuatl toponym Chollollan, meaning "the place of the retreat."

Prior to its acquisition, Cholula was produced for three generations in Chapala, Jalisco, used primarily as an ingredient in sangrita. Following expansion across the Mexican market, Cholula was first introduced to the United States in Austin, Texas in 1989. During the 1990s, Cholula achieved distribution in supermarket chains throughout the Ameri-

can Southwest and is currently available nationwide, as well as in many Canadian supermarkets. The product is most frequently retailed in 5oz glass bottles, although the original flavor is also available in 2oz and 12oz glass bottles, as well as 64oz plastic bottle, and 7g single-use condiment packets.

### Market Share

Cholula ranks 6 in revenue in the US, but is behind Tabasco in volume share. A plausible reason for this is the 2oz bottle size, which looks very similar to Tabasco's trademark bottle. A Mexican sauce, Cholula was introduced to Texas in the 1990s and is mostly consumed in the Southwestern US.

### Sustainability

Cholula claims "all natural" with its products, but does not claim organic. They are involved in multiple sporting events which support various environmental initiatives, but have not activism to speak of. Jose Cuervo also has nothing readily available that pertains to sustainability.

Diageo (the holding company of Jose Cuervo and many other liquor brands) published its first sustainable packaging guidelines in the middle of December 2011. They have set goals of 10% less average weight across all packaging by 2015, as well as a 20% average increase of recycled content in their packaging. They also are driving for 100% reusable, recyclable or waste management suitable packaging by this time.



## COMPETITORS ... GRACE SCOTCH BONNET SAUCE

Manufactured by  
**Grace, Kennedy & Company Limited**  
Kingston, Jamaica

Founded  
**Jamaica, February 14th, 1922**

Website  
**www.gracefoods.com**

Primary Package  
**4.8oz (142mL) glass bottle** with plastic screw cap and paper label.

Average Price  
**\$4.99**

### Back Story

GraceKennedy is one of the Caribbean's largest and most dynamic corporate entities. The company started in Jamaica in 1922 as a small trading establishment and wharf operators. It has expanded and diversified over the years, changing from a privately-owned enterprise to a public company listed on the stock exchanges of Jamaica, and Trinidad & Tobago.

Scotch Bonnets are relatives of habaneros, but if habaneros are the serious, hard working pepper plugged into so many independent American hot sauces, Scotch Bonnets are their laid-back island cousin, just as hot but more relaxed and sweeter

towards the worlds of spice and flavor. Scotch Bonnets would rather look silly and taste tropical than merely kill you with spice. This sauce, a colorful yellow, is Grace's best condiment by a long shot. The simple mashing of Scotch Bonnets (with some slight flavor accentuators) really captures the heat of the islands and flavor of a solid hot sauce.

### Market Share

The product is very new, having been brought to market a little over a year ago, so information is difficult to source.

### Sustainability

GraceKennedy has no direct environmental policy. They do have a large number of charities, scholarships and community oriented events. While they preach environmental stewardship in their corporate pledge, there is little evidence to support this within their company. Neither is there within Jamaica, where there isn't so much as a municipal waste management system.



## COMPETITIVE ENVIRONMENT ... IN-STORE

On the shelf, certain rules are consistent across all American markets.

1. Hot Sauce is positioned at or slightly above eye level.
2. It is most likely to be found among condiments rather than cooking sauces or marinades. This is perhaps quite insightful as the chili is in the nightshade family, like tomatoes, the source ingredient for Ketchup.
3. Almost all ethnic variables are lumped together into one section, though occasionally one might encounter one or two brands in the foreign food aisle.
4. The shelf tends to look like a sea of red. Sauces in other colors can really stand out.
5. Though expensive per ounce, bulk purchases of hot sauce are rare. Larger bottle are usually at ground level for such needs.
6. Sauce isles are full of remarkably redundant products. The exception being Asian Markets and now Tabasco Sauce. Bottle types, colors labels, etc. all stay within a narrow range. So do taste profiles.
7. The Chinese and Italian sauces are generally made for cooking. They are also the worst at shelf pop and are displayed horribly.
8. Tabasco is the only company that uses their cases as POP displays. While it is a clever use, the space for hot sauces is too small to be effective.



## COMPETITIVE ENVIRONMENT ... IN-STORE

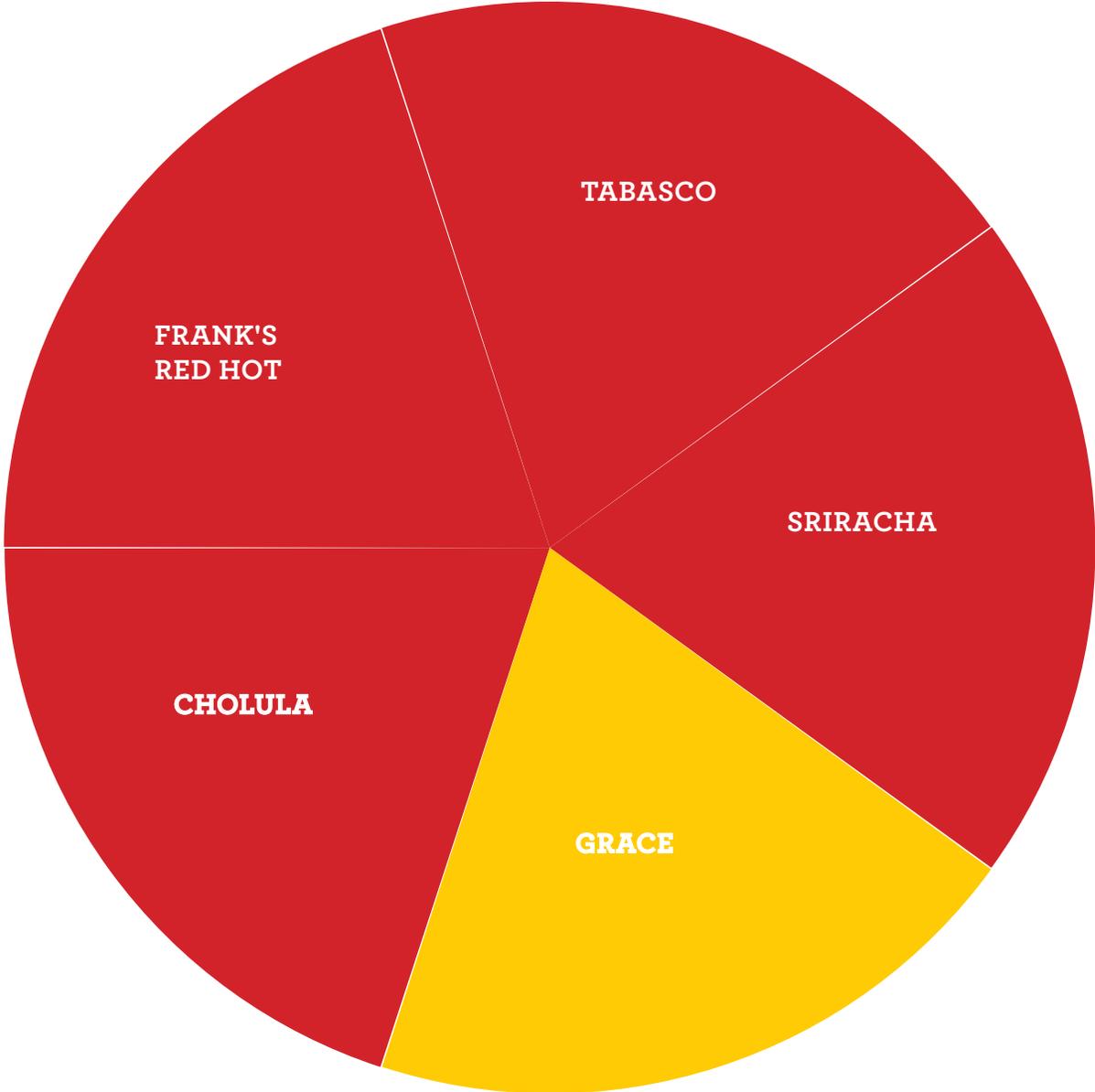
9. Sauces can vary as greatly in quality as they can in price. Price doesn't always reflect quality though.
10. Brand placement seems to always lead with Tabasco. Depending on the market, many different category leaders will surround it.
11. Most category leaders are obsessed with being iconic. This may be as much a reflection of the overall category as it is of the branding.
12. American brands are trying to expand their reach into other flavor profiles. In particular, they are seeking to compete directly with Mexican brands which are quickly gaining market share.
13. With the exception of Sriracha, virtually every package in the condiment aisle uses Shrink film for product safety.
14. Most bottle types communicate "condiment" while some like Frank's and Louisiana are used more in cooking.
15. Most packing for hot sauces is a glass jar or bottle! All allow full product viability.
16. Apart from the belly label, most hot sauce bottles have neck bands. This may be to conceal lingering product in the neck.



# COMPETITORS ... SAUCE COLOR

To prove a point, the colors of the category leaders' sauces hardly vary. With the exception of Grace Scotch Bonnet, they are all red.

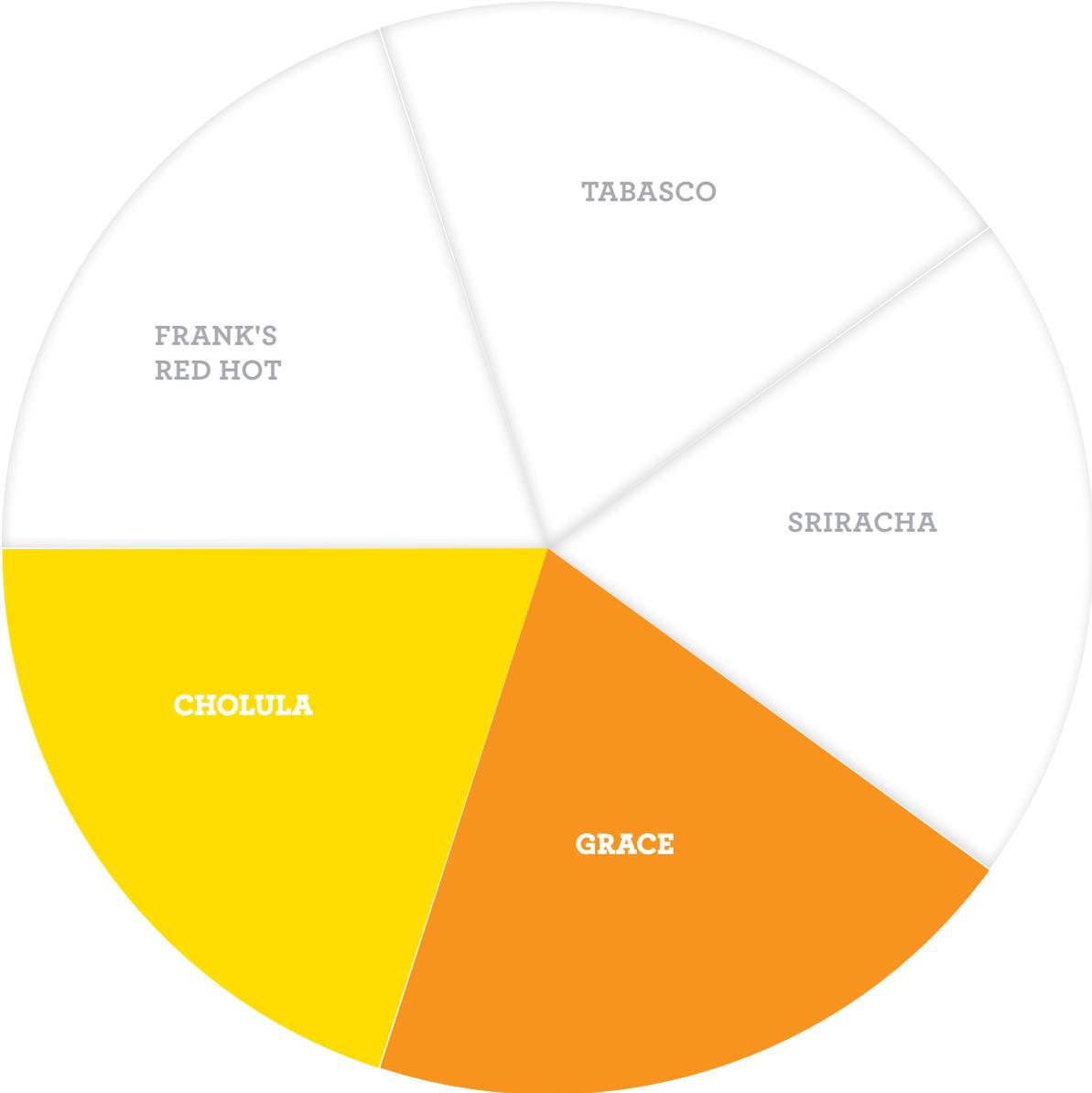
While some of these brands do have green and dark brown color variants. They are almost always some sort of red. Go figure, most chilies are red. However, with so many glass bottles showing red product, the core brand color is almost always going to be red. This makes it tough for sauces to stand out on the shelf.



# COMPETITORS ... DOMINANT BRAND COLOR

When the sauces are mostly red, there is a narrow spectrum of colors that can be effectively used for a label. The labels need to provide contrast and legibility on the shelf. The one exception is the Grace Scotch Bonnet. The yellow/orange of the Scotch Bonnet Pepper is translated to the sauce and is light enough that darker colors communicate well on the package. An orange label, may not be the best solution, but the color of the product really stands out amongst the rivals.

Otherwise, after white, the most popular label/brand color is yellow. Of the category leaders, Cholula uses yellow. There are lots of regional and category followers that use yellow. The most notable is Louisiana Hot Sauce.



## **FIELD OBSERVATIONS ... KEY FINDINGS**

The majority of hot sauces are shelved at or above eye level, regardless of venue.

Red is the dominant color of sauce, with green, browns and orange also present.

White, yellow and red dominate the labels, with occasional oranges and greens.

Tabasco has switched to a paperboard carton for outer packaging, which makes them really pop. Has this influenced sales in a positive way? It certainly leads to more waste.

Smaller bottle seem to communicate strength in the sauce.

Pepper sauces seem to fall into two buckets: Those which are for cooking and those which are used as condiments.

These buckets follow cultural groups too.

To an American, there is little relation between a sauce container and it's use.

Inhibitor caps in the neck of the bottle don't really help with dosing, but they contribute to frustration.

Brand loyalty is extremely prevalent in this market. People swear by their sauce.

People will buy hot sauce based on what they think the package communicates. They are concerned about making the right choice.

## **COMPETITORS ... OBSTACLES AND OPPORTUNITIES**

1. The sauce will be red. How can we get around this?
2. Likewise, is there a way we can get around whites and yellow label colors?
3. Most bottle designs have the same profile. Big base and slender neck. Most are glass.
4. The 5oz woozy bottle is to hot sauce the way slim cans are to energy drinks.
5. All sauces live in distinct flavor groups. Can we immediately move around these?
6. The only fresh tasting sauce is a freshly made sauce. Ornithology can exploit this.
7. How can we package hot sauce as condiment and a cooking ingredient?
8. Price per ounce of Ornithology is about 4 times higher than average market prices.
9. Sustainable initiatives vary widely. They get better with bigger parent brands.  
We need to start off with a good story and a great sustainability plan.
10. Can we make brand extensions an easier fit than they usually turn out to be?

**SECTION C:**

# **MARKET SEGMENTS**

## **MARKET SEGMENTS ... INTRODUCTION**

The blessing and the curse of hot sauce is that it's a deeply personal opinion. Even amongst those who consume the same brand, opinions about it's positive attributes can vary widely.

The 5 sauces in the previous section are market leaders and the most popular examples of specific pepper sauce styles. They represent a sampling of 20+ sauces taken for this study and displayed during interviews with several individuals.

Each candidate was shown all of the bottles with the main candidates in front, then allowed to explore the collection. No preference is given to any sauce or bottle style, though the dominance of specific styles is evident and largely unavoidable. It should also be reiterated that the 5 "best in class" sauces are displayed in front of the other sauces and may sway the candidate's responses.

## MARKET SEGMENTS ... THE CANDIDATES



Name: **Gina Moore**

Age: **29**

Occupation: **Journalist**

Favorite Hot Pepper Sauce:  
**Peri-Peri Sauce**

*Which of these is your favorite? What is your favorite hot sauce overall?*

"I really like Peri-Peri (*pronounced peli-peli*) but of these, I enjoy the Scotch Bonnet sauce the most. Just so we're clear, I don't like the Tabasco. I never have. I'll avoid the bottles on the aisle."



Name: **Jose Rivera**

Age: **64**

Occupation: **Retired**

Favorite Hot Pepper Sauce:  
**Tabasco**

*Which of these is your favorite? What is your favorite hot sauce overall?*

"My favorite is Tabasco, but I also love the hot sauce they give me at my favorite Chinese restaurant. It's very dry and very spicy."



Name: **Scott**

Age: **37**

Occupation: **Unknown**

Favorite Hot Pepper Sauce:  
**Hottest he can find.**

"I have to be careful cooking for my kids. Usually, you want the smallest bottle. It has the most power, but also the most control..."



Name: **Tom Haggerty**

Age: **49**

Occupation: **Supervisor**

Favorite Hot Pepper Sauce:  
**Tabasco Chipotle**

*Which of these is your favorite? What is your favorite hot sauce overall?*

"I dig the Sriracha sauce the most, but my favorite hot sauce has to be Tabasco Chipotle. The smell is so warm and inviting. It's like aromatherapy for me."

## MARKET SEGMENTS ... HOT SAUCE WEBSITES



### [www.hotsauce.com](http://www.hotsauce.com)

Hot Sauce Blog is more of a store, than a fan site. While it does have reviews on a lot of sauces and news on the latest to come to market, visitors must dig for this information.

Below are their ratings for the best-in-class sauces in this study.

#### **Tabasco**

2 out of 5 peppers. Respected as the original American pepper sauce and credited with bringing about the current chili head movement, it is not considered very hot or as robust in flavor.

#### **Frank's RedHot**

Unlisted.

#### **Huy Fong Sriracha**

4 out of 5 peppers. Considered authentic and a needed staple of the household. Though not very hot compared to other sauces.

#### **Cholula**

4 out of 5 peppers. Not considered very hot at all, but appreciated for excellent flavor. Chili head fans will add chili extract for heat.

#### **Grace Scotch Bonnet**

Unlisted.



### [www.scottrobertsweb.com](http://www.scottrobertsweb.com)

A virtual clearinghouse of all the hot sauces available, ScottRobertsWeb.com is the first stop for in-depth research on the subject. Managed by Scott Roberts, since 2003, the website is really a fan site for the spicy juice that went crazy.

All previously mentioned "best in class" examples are present in this blog, but their reviews could very well be as painful as the sauces are.

#### **Tabasco**

Scott has a lot of respect for this company, but finds the sauce overrated at best.

#### **Frank's RedHot**

Unlisted.

#### **Huy Fong Sriracha**

Once again, an overrated sauce. Turned off by a bitter after-taste. Makes one of the few packaging observations on the entire site here, noting that it looks cheap and messy.

#### **Cholula**

Really appreciates the taste of this sauce and thinks it's a much better alternative to Tabasco, though it requires an extra kick.

#### **Grace Scotch Bonnet**

Unlisted.



### [goodhurts.blogspot.com](http://goodhurts.blogspot.com)

Another personally managed blog site for chili heads. He does however, review a myriad of sauces, but more as a hobbyist. His posts are farther apart than Scott Robert's and though he has been around for a few years now, his "collection" of reviews is smaller.

#### **Tabasco**

5.5 out of 10. Considers Tabasco the ubiquitous hot sauce version of Coca-Cola, and suggests several alternatives with more heat and/or flavor.

#### **Frank's RedHot**

Unlisted.

#### **Huy Fong Sriracha**

Unlisted.

#### **Cholula**

6.8 out of 10. Finds the flavor exceptional and refers to it as one of the best sauces in America for regular people.

#### **Grace Scotch Bonnet**

8.4 out of 10. Finds the sauce to be very near excellent, yet it's consistency is unnatural for a hot sauce.

## MARKET SEGMENTS ... INTERVIEW OBSERVATIONS

To an American, there is often little relation between a sauce container and how it is used. However, people generally try to pair sauces with styles of food (i.e. Scotch Bonnet with Jerk Chicken, or Sriracha with Stir Fry).

Consumers collectively associate the package and the product, much like a banana and its peel.

Inhibitor caps in the neck of the bottle don't really help with dosing, but they contribute to frustration.

Brand loyalty is extremely prevalent in this market. People swear by their sauce.

People will buy hot sauce based on what they think the package communicates. They are concerned about making the right choice.

Glass is not only viewed as an indicator of quality, but also eco-friendly. It is perceived as very easy to recycle.

Plastic is perceived as a poor choice. For reasons from health to sustainability to taste and product stability, plastic is not a favored material.

Even savvy shoppers forget about the fuel savings from lighter packaging. Personal health trumps other aspects of sustainability.

People like squeeze tubes.

Product waste is a big factor. "Can I get every last drop from a bottle?"

A company's behavior can influence their customer perception of the product and shatter brand loyalty. Tropicana's unwillingness to handle the customer frustrations for pesticide residue in their product (even though they supposedly fixed it) has led some families to choose other brands.

Convenience is really an issue. Not because people are lazy, but because the system can be overwhelmingly complex. Clarity in best practices would help.

Bottle Caps cause confusion. Are they recyclable?

Many prefer the look of a homespun label over one which is sleek and "Designed" (like beer labels).

Packaging has limits. Wood may be a natural product, but in with Cholula, it's viewed as kitschy and wasteful.

Safety does not seem to be a primary concern. Perhaps it is taken for granted with the sealants?

To a middle-aged affluent buyer, bigger doesn't always mean more and therefore better, although it can also be about bulk purchases in order to lighten a footprint.

Product "showthrough" is important to consumers. The wrong choice could be unpleasantly painful.

## **MARKET SEGMENTS ... OBSTACLES & OPPORTUNITIES**

1. A better cap which can share the recycling stream with a bottle.
2. The package should remain lightweight.
3. Established and communicate product authenticity through the package.
4. Size also an issue. Product is not concentrated. Should it be?
5. A portfolio of sauces will be important for families and friends.
6. Ample real estate should be given to ingredients, sourcing and certification.
7. Easy recycling or reclamation options with product.
8. Price point has to stay low.
9. Quality has to stay high.
10. Shelf disrupters at POS to get the product to stand out.
11. Determine reclamation scenarios.

**SECTION D:**

**MATERIALS,  
PROCESSES,  
WASTE, AND  
ENERGY**

## **MATERIALS, PROCESSES, WASTE AND ENERGY ... INTRODUCTION**

The current 5oz Woozy based system for dispensing American-made hot sauce is a daunting force to reckon with. How so? The bottles have been part of the vernacular for so long that they not only feel natural, one begins to question whether there even is a better solution.

With little glass and a generally highly concentrated product inside, the product packs and ships with little assumed impact to begin with. Plus, their ubiquitous place in the market means that they probably have a terribly low price-point. One that will be next to impossible to beat.

Still, one accepts such challenges because they are hard, not simple. The payoff can be economic, sustainable and could bring a calculated, yet enviable, shelf-pop.

Time to forge forth!

## **MATERIALS, PROCESSES, WASTE AND ENERGY ... CURRENT ORNITHOLOGY**

### **Structure**

5oz "woozy" stock bottle. Made of glass. Kick up base displays no markings.

### **User Needs**

Polyethylene black screw cap.

### **Product/Package Ratio**

#### *Volume*

The air space in the bottle starts about .75" below the screw threads finish.

#### *Dimensions*

Liquid product fills the package to form. Bottle is 6.75" tall, 1.875" diameter at the base and 1" diameter at the lip of neck and screw thread finish for cap, plus .375" diameter opening.

#### *Weight*

5oz Sauce

6.2oz Package

### **Product Needs**

Body Label, 5.5" by 3.125" in size. 4 color gloss paper. Labels require an adhesive, glue applied. Gum Arabic to lead edge.



## **MATERIALS, PROCESSES, WASTE AND ENERGY ... TABASCO**

### **Structure**

2oz custom sauce bottle. Made of glass. Kick up base displays the name of the company and what seems to be a lot number.

### **User Needs**

Paperboard Tab from outer box. Polyethylene red/octagonal screw cap. Screw cap sealed with LDPE shrink-wrap.

### **Product/Package Ratio**

#### *Volume*

The air space in the bottle starts about .75" below the screw threads

#### *Dimensions*

Liquid product fills the package. Bottle 5.375" tall, 1.375" diameter at base. and .75" diameter at the neck. .5" diameter at screw thread finish for cap and .125" diameter opening. Paperboard Box: 1.625" squared by 5.5" tall

#### *Weight*

2oz Sauce

3.5oz Package

.5oz Secondary Paperboard Package

### **Product Needs**

Neck label (2.625" by 1") 2 color printed foil paper label

Body Labels (1.625" square front and 1.125" by 2.375" back) 2 color printed matte gloss label. Labels require a wide temperature adhesive, glue applied. Either liquid or hot melt applied to entire label back.



## **MATERIALS, PROCESSES, WASTE AND ENERGY ... FRANK'S REDHOT**

### **Structure**

5oz custom sauce bottle. Made of glass. Heel displays production date and lot number. Kick up base displays lot number too.

### **User Needs**

Polyethylene black screw cap with flip top and pour spout. Screw cap sealed with LDPE shrink-wrap.

### **Product/Package Ratio**

#### *Volume*

The air space in the bottle starts about .625" below the screw threads

#### *Dimensions*

Liquid product fills the package to form Bottle 6.375" tall, 1.875" diameter at base and 1.25" diameter at widest point of the undulating neck. 1" diameter at screw thread finish for cap and .75" diameter opening.

#### *Weight*

5oz Sauce

6oz Package

### **Product Needs**

Body Label, 1.875" by 6.5" in size. 4 color + metallic printed matte gloss label. Labels require a wide temperature adhesive, glue applied. Either liquid or hot melt to lead edge.



## MATERIALS, PROCESSES, WASTE AND ENERGY ... SRIRACHA HOT CHILI SAUCE

### Structure

17oz custom sauce bottle. Made of PET. Kick up base displays Huy Fong name and PET labeling.

### User Needs

Polyethylene green screw cap with flow control. 1" diameter induction seal wafer.

### Product/Package Ratio

#### *Volume*

The air space in the bottle starts about .75" below the opening.

#### *Dimensions*

Liquid product fills the package to form. Bottle 7.25" tall, 2.5" diameter at base and 1" diameter at neck and screw thread finish for cap, plus .75" diameter opening.

#### *Weight*

17oz Sauce

2.8oz Package

### Product Needs

Direct 1 color screen printed label Blow Molded PET with molded kick-up.



## **MATERIALS, PROCESSES, WASTE AND ENERGY ... CHOLULA HOT SAUCE**

### **Structure**

5oz custom sauce bottle. Made of glass. Kick up base displays maker's mark and lot number.

### **User Needs**

Polyethylene white screw cap embedded in milled wood cap.  
Screw cap sealed with LDPE shrink-wrap

### **Product/Package Ratio**

#### *Volume*

The air space in the bottle starts about .75" below the screw threads

#### *Dimensions*

Liquid product fills the package to form Bottle 6.375" tall, 1.875" diameter at base and 1" diameter at lip of neck and screw thread finish for cap, plus .375" diameter opening.

#### *Weight*

5oz Sauce

6oz Package

### **Product Needs**

Neck label, 3.5" by 1.25" in size. 4 color gloss paper label

Body Label 4.125" by 3.5" in size, die cut with beveled corners. 4 color gloss paper label. Labels require a wide temperature adhesive, glue applied. Either liquid or hot melt to lead edge.



## **MATERIALS, PROCESSES, WASTE AND ENERGY ... GRACE SCOTCH BONNET SAUCE**

### **Structure**

5oz "woozy" stock bottle. Made of glass.  
Kick up base displays very faint markings.

### **User Needs**

Polyethylene black screw cap. Screw cap sealed with a gold colored LDPE shrink-wrap.

### **Product/Package Ratio**

#### *Volume*

The air space in the bottle starts about .75" below the screw threads finish.

#### *Dimensions*

Liquid product fills the package to form Bottle 6.75" tall, 1.875" diameter at base and 1" diameter at lip of neck and screw thread finish for cap, plus .375" diameter opening.

#### *Weight*

4.8oz Sauce

6.2oz Package

### **Product Needs**

Body Label, 5.5" by 3.125" in size. 4 color gloss paper label. Labels require an adhesive, glue applied. Gum Arabic to lead edge.



## MATERIALS, PROCESSES, WASTE AND ENERGY ... COMPARE AND CONTRAST

Brand	Structure	User Needs	Sauce/Package Ratio	Volume	Product Needs
<b>Ornithology</b>	5oz "woozy" stock bottle	Polyethylene black screw cap	5oz Sauce 6.2oz Bottle	.75" below screw threads	4 color gloss paper label
<b>Tabasco</b>	2oz custom sauce bottle	1. Paperboard Tab 2. Polyethylene red/octagonal screw cap 3. Screw cap sealed with LDPE shrink-wrap	2oz Sauce 3.5oz Bottle .5oz Secondary Paperboard Box	.75" below screw threads	1. 2 color printed foil neck label 2. 2 color printed matte gloss label
<b>Frank's RedHot</b>	5oz custom sauce bottle	1. Polyethylene black screw cap with flip top 2. Screw cap sealed with LDPE shrink-wrap	5oz Sauce 6oz Bottle	.625" below screw threads	1. 4 color + metallic printed gloss label. 2. Either liquid or hot melt to lead edge.
<b>Huy Fong Sriracha</b>	17oz custom sauce bottle	1. Polyethylene green cap with flow nozzle. 2. 1" diameter induction seal wafer	17oz Sauce 2.8oz Bottle	.75" below the opening	1. Direct 1 color screen printed label. 2. Blow Molded PET with molded kick-up. 1. Paper neck label
<b>Cholula</b>	5oz custom sauce bottle	1. Polyethylene white screw cap embedded in milled wood cap. 2. Screw cap sealed with LDPE shrink-wrap	5oz Sauce 6oz Bottle	.75" below screw threads	2. Die cut gloss paper body label 3. Wide temperature adhesive, glue applied.
<b>Grace Scotch Bonnet</b>	5oz "woozy" stock bottle	1. Polyethylene black screw cap. 2. Screw cap sealed with a gold shrink-wrap	4.8oz Sauce 6.2oz Bottle	.75" below screw threads	1. 4 color gloss paper body label 2. Gum Arabic to lead edge.

## MATERIALS, PROCESSES, WASTE AND ENERGY ... NOTABLE CONTENDERS

### Dave's Gourmet Adjustable Heat Hot Sauce

#### Structure

Custom bottle, actually 2 interlocking PET tanks. The tanks are then topped with a Polyethylene spray cap.

#### User Needs

Polyethylene black spray cap. Cap sealed with a clear LDPE shrink-wrap

#### Product/Package Ratio

##### *Volume*

The air space in the bottle is miniscule. Cap is aerosol spray cap.

##### *Dimensions*

Liquid product fills the package to form. Bottle 5.375" tall and a 2" diameter. Aerosol spray cap is 2.5" tall.

##### *Weight*

7.8oz Sauce

3.2oz Package

#### Product Needs

Neck label IS 5.5" by .75". Body Label is 6" by 4.25" in size. 4 color gloss paper label. Labels are most likely water-based liquid adhesive, applied with full coverage. Bottle must be assembled in 3 parts. Two tanks of super hot and mild hot sauces, then the aerosol spray cap on top.



## MATERIALS, PROCESSES, WASTE AND ENERGY ... NOTABLE CONTENDERS

### Huy Fong Sambal Oelek

#### Structure

8oz custom sauce bottle. Made of PET. Kick up base displays Huy Fong name and PET labeling.

#### User Needs

Polyethylene green screw cap with Huy Fong name. 2" diameter induction seal wafer.

#### Product/Package Ratio

##### *Volume*

The air space in the bottle starts about .375" below the opening.

##### *Dimensions*

Liquid product fills the package to form. Bottle 4.375" tall, 2.25" diameter at base and 2" diameter at opening with screw thread finish for cap.

##### *Weight*

8oz Sauce

1.3oz Package

#### Product Needs

Body Label is 6.5" by 2.25" in size. 3 color offset print to foil paper label.



## MATERIALS, PROCESSES, WASTE AND ENERGY ... NOTABLE CONTENDERS

### Gochujang Pepper Paste

#### Structure

17.6oz stock tub. Made of Polyethylene. Base displays tolerances and probably recycling information in Korean.

#### User Needs

Latch tab for flip up lid. Induction seal.

#### Product/Package Ratio

##### *Volume*

The air space in the bottle starts about .5" below the opening.

##### *Dimensions*

Liquid product fills the package to form. Tub 3.25" tall, 4.25" wide by 3 deep" at base and .25" lip for lid around entire piece.

##### *Weight*

17.6oz Sauce

1.6oz Package

#### Product Needs

Body Labels are 3" by 2" in size. 4 color offset print plus foil on crack and peel full coverage label.



## MATERIALS, PROCESSES, WASTE AND ENERGY ... CROSS-PRODUCT INSPIRATION

### Soy Sauce Bottle

#### Structure

6.7oz custom bottle. Made of glass. Kick up base displays no markings.

#### User Needs

Polyethylene red pour/screw cap. Screw cap (pour cap) sealed with LDPE shrink-wrap.

#### Product/Package Ratio

##### Volume

The air space in the bottle starts about .75" below the opening.

##### Dimensions

Liquid product fills the package to form. Bottle 5.25" tall, 2.375" diameter at base and 1.125" diameter at lip of neck and screw thread finish for cap, plus .75" diameter opening. Cap holes on each side. 1.25" diameter.

##### Weight

5oz Sauce

6.7oz Package

#### Product Needs

Direct 1 color ACL printed label. Underside of cap displays small plastic gasket.

*The 5oz woozy requires a lot of glass for the neck. What if the neck wasn't required? A few soy sauce makers employ this tactic, which effectively reduces the weight of the container but still delivers the same amount of product yet enables the user to better manipulate the amount of sauce they use (even take the top off to spoon it out for cooking). The cap could even be made with adjustable flow rates like for spices (thanks for the thought seed Wendy).*

*The secondary package is probably not unlike the regular 5oz woozy's. Just some paperboard, though this could be adjusted to a better engineered design around. The tertiary package would again normally be cardboard, but could be reusable wood or plastic since it's being sourced locally.*



## MATERIALS, PROCESSES, WASTE AND ENERGY ... CROSS-PRODUCT INSPIRATION

### Method Laundry Detergent Refill Pouch

#### Structure

34oz Pouch. Made of Polyethylene Terephthalate Polyester.  
Laminated Seams.

#### User Needs

PET/nylon/LDPE Laminate for pouch. Polyethylene threaded spout with screw cap. Polyethylene insert for product handle.

#### Product/Package Ratio

Volume

The air space in the bottle starts about 3" below the opening.

Dimensions

Liquid product fills the package to form. 9.75" tall, 8" wide by 3 deep" at base and .375" seal around entire piece.

Weight

34oz Detergent

8.5oz Package

#### Product Needs

Up to 8 color direct print. Lamination technique to seal edges, stabilize Polyethylene handle and to attach screw cap to pouch.

*The PET bladder has been around for years, but has really found it's heyday from the adoption by Method chemicals for their primary refill containers. Extremely lightweight and durable, the tip can be positioned and designed to dispense soap, apple sauce and even cake frosting. Open top versions of this package are used to hold nuts and granola and has in some case, even received C2C certification. Secondary packaging would really be about keeping the product manageable in bulk, as opposed to outright protection. Therefore, tertiary packaging isn't needed for this package. That may change if shipping increases with a potential decision to expand.*



## MATERIALS, PROCESSES, WASTE AND ENERGY ... CROSS-PRODUCT INSPIRATION

### Tom's of Maine Toothpaste Tube

#### Structure

17.6oz Plastic Barrier Laminate tube. Made of Polyethylene and Ethylene Vinyl Alcohol.

#### User Needs

Paperboard Tab from outer box. Polyethylene screw cap. Optional .25" diameter induction seal wafer.

#### Product/Package Ratio

##### Volume

The air space in the bottle starts about .125" below the opening.

##### Dimensions

Liquid product fills the package to form.

6.375" tall, 1" wide at base of screw cap finish.

.625" tall screw cap.

##### Weight

4.2oz Toothpaste

.5oz Package

#### Product Needs

6 color direct offset print on tube. 4 color offset on paperboard box.



*Toothpaste tubes have been used in many sorts of packaging for years. From tomato paste to hair gel, the tube can be constructed from lots of different materials to manage all sorts of contents.*

*Tubes made from aluminum or metal are very good for the food quality, but require a lot of energy to produce. The cap is also an issue, but because of the versatility of the tube itself, this part can be reconstructed to meet the needs of the package.*

*Secondary packaging is used for both shipping and shelf POP. So what if the shipping container is merely grided and the tube is adjusted to have a wider face?*

## MATERIALS, PROCESSES, WASTE AND ENERGY ... CROSS-PRODUCT INSPIRATION

### Elmer's Glue-All Bottle

#### Structure

1.2oz High Density Polyethylene bottle.

#### User Needs

Polyethylene screw cap.

#### Product/Package Ratio

##### Volume

The air space in the bottle starts about .125" below the opening.

##### Dimensions

Liquid product fills the package to form. 6.375" tall, 2.5" wide and 1.125" deep.  
.75" at base of screw cap finish. 1.75" tall nozzle.

##### Weight

4oz Glue

1.2oz Package

#### Product Needs

4 color offset printed on paper crack and peel label positioned on front and 1 color offset printed on paper crack and peel label positioned on back.

*The Huy Fong bottle has a cap that enables tremendous dose control. It is great in the restaurant environment and really functions like ketchup bottle with hot dogs or a hamburgers.*

*But what about this special cap and container to go with it? The packaging is in essence, like a large glue bottle. So, what about glue bottles? They can be adjusted to a myriad of thicknesses and flow controls. The user can increase the rate of flow by applying pressure to the chamber and so long as it's flexible, that chamber can be made out of many materials. Glue also requires protection from spoilage and drying out. In other words, hot sauce has a lot of the same qualities and could benefit from the same thinking on it's packaging. It should also be noted that a few barbecue sauces and at least Nathan's brand mustards and ketchups come in squirt bottles which can serve a similar set of functions on a large scale.*



## MATERIALS, PROCESSES, WASTE AND ENERGY ... COMPARE AND CONTRAST, PART 2

Brand	Structure	User Needs	Product/Package Ratio	Volume	Product Needs
<b>Dave's Adjustable Gourmet Hot Sauce</b>	2 interlocking PE tanks. Topped with a spray cap.	Black spray cap. Sealed with LDPE shrink-wrap	7.8oz Sauce 3.2oz Package	The air space in the bottle in miniscule	Neck Label, body label, adhesive and assembly
<b>Huy Fong Sambal Oelek</b>	8oz custom PET sauce jar.	1. Green screw cap with Huy Fong name. 2. 2" diameter foil induction seal wafer.	8oz Sauce 1.3oz Package	.375" below the screw threads	Foil label printed with 3 color offset. Crack and peel adhesive
<b>Gochujang Pepper Paste</b>	17.6oz stock tub.	Latch tab for flip up lid. Foil induction seal.	17.6oz Sauce 1.6oz Package	.5" below the opening	4 color print + foil on Crack and peel label
<b>Kikoman Soy Sauce</b>	6.7oz custom bottle.	1. Polyethylene red pour/screw cap. 2. Screw cap (pour cap) sealed with LDPE shrink-wrap	5oz Sauce 6.7oz Package	.75" below the screw threads	1. 1 color ACL print. 2. Small plastic gasket in cap
<b>Method Laundry Detergent Refill</b>	34oz custom pouch.	1. PET/nylon/LDPE Laminate pouch. 2. Polyethylene threaded spout with screw cap. 3. Polyethylene insert for product handle	34oz Detergent 8.5oz Package	3" below the spout	8 color direct print. Lamination technique to seal edges, stabilize Polyethylene handle and to attach screw cap to pouch.
<b>Tom's Of Maine Toothpaste</b>	17.6oz stock Plastic Barrier Laminate tube.	1. Paperboard Tab 2. PP screw cap 3. .25" diameter foil induction seal wafer	34oz Detergent 8.5oz Package	.125" below the opening	6 color direct offset print on tube. 4 color offset on paperboard box.
<b>Elmer's Glue</b>	1.2oz HDPE bottle.	Polyethylene screw cap	4oz Glue 1.2oz Package	.125" below the screw threads	Offset printed paper crack and peel label

## **MATERIALS, PROCESSES, WASTE AND ENERGY ... OBSTACLES & OPPORTUNITIES**

1. Current glass packaging virtually doubles weight. Can this be avoided?
2. A better dosing mechanism (flow control) may assist new package form.
3. Can secondary packaging be used as an advantage?
4. Direct printing, or a paper label?
5. A safety seal should be considered.
6. The line between custom and stock containers can and should be blurred.
7. Volume, weight and recyclability should be considered together.
8. Price point still has to stay low.
9. Will product still have shelf pop?
10. Can the materials in these products be swapped with more eco-friendly ones?

**SECTION E:**

# **SUPPLY CHAIN ANALYSIS**

## SUPPLY CHAIN ANALYSIS ... INTRODUCTION

Sourcing materials for your package is probably the most straightforward part of the design process and the most difficult. The criteria we establish for vendor and materials choices will test and (in some cases) break our well intentioned concepts. It can also lead to truly innovative solutions which can reduce our eco-impact much more than originally thought. When looking for vendors, we try to answer the following questions:

- 1. Material Sources.** Are they environmentally responsible? Do they have knowledge of the chain of custody? Do they use materials that carry certified trustmarks? What is the FSC certification?
- 2. Energy Sources.** Are they using renewable or clean energy? Are they being efficient with their energy use? What is their Carbon Footprint?
- 3. Labor.** Are they engaging in fair labor practices? Do they pay a living wage and keep their work environment clean and clear of hazards?
- 4. End of Life.** Can the materials be folded into existing recycling streams? If not, do the suppliers have a reclamation system?
- 5. Location.** Where are they? How far must the material or product travel for this good/service to contribute positively?
- 6. Community/Environment.** Do they hire locally or support local charities? Do they buy carbon offsets or support environmental causes?

## SUPPLY CHAIN ANALYSIS ... PACKAGE MATERIALS

### Paragon Glass Bottles



Rappaport Sons Bottle Co., Inc.  
Location: Brooklyn, NY  
Website: <http://www.rappaportbottle.com>

What's up: A Brooklyn original. These guys have been distributing bottles for commercial and industrial use for decades.

The buzzkill: Not really at the source, however they can spec from sources I determine. Hmmm

### Custom PE Closures



Van Blarcom Closures, Inc.  
Location: Brooklyn, NY  
Website <http://www.vbcpkg.com/>

What's up: Born and raised in Brooklyn, VBC has been making closures for the pharmaceutical Industry for decades. They are obsessed with quality control and extremely high material & engineering standards. They require and perform a Certificate of Analysis for all projects. They have no noted sustainability efforts, but they are clearly positioned to make strides in the realm.

The buzzkill: They have no noted sustainability efforts posted on their website.

### Plastic Laminate Pouches



Mayor Packaging  
Location: Hong Kong, China  
Website: <http://www.mayor.com.hk/>

What's up: Mayor produces the film and converts the final detergent refill pouch for Method. Really a simple and highly creative item, the environmental benefits of this package are touted in many sources. The company is a member of the Carbon Disclosure Project, the Sustainable Packaging Coalition and Sedex, which looks for responsible and ethical business practices.

The buzzkill: They're in China man!

## SUPPLY CHAIN ANALYSIS ... PACKAGE MATERIALS

### Plastic Barrier Laminate and HDPE bottles



Global Packaging Inc.  
Location: La Habra, CA  
Website: <http://www.globalpack.biz/index.html>

What's Up: Creators of standard Plastic Barrier Laminate tubing, they have recently started producing PE tubes with PE caps that seamlessly integrate into recycling waste streams. No cap removal or material separation needed. These tubes are also being made with up to 69% Post-Consumer-Resin, depending on the needs of the client. A certified Minority-Owned Business, they offer short lead times and have a fully disclosed procurement process.

The buzzkill: Their factories are in Asia man!

### Paperboard Stock



Globe Guard (Salazaar Packaging)  
Location: Plainfield, IL  
Website: <http://www.globeguardproducts.com/>

What's up: There's a lot out there in recycled paperboard products and these guys are the best. They've got just about all the Paperboard boxes and dividers that this sort of en devour needs.

The buzzkill: it would be nice to have them closer.

### Foil Induction Seals



Selig  
Location: Aurora, Ontario Canada  
Website: <http://www.seligsealing.com/>

What's up: Foil Induction Seals are a nifty device that hermetically seals the contents of a bottle. It uses a fraction of the energy and materials of other sealing methods and the seals have shown promise in European recycling Systems.

The buzzkill: these things are a monstrous hybrid, that (despite what is written above) are likely to end up in a landfill. They have may have shown promise, but nobody is actually recycling them.

## SUPPLY CHAIN ANALYSIS ... PACKAGE MATERIALS

### Shrink Film



Safety Seal

Location: Hamilton, Canada

Website: <http://www.safetyseal.ca/index.html>

What's up: This company produces and prints their own Shrink Film, even offering a PLA alternative.

The buzzkill: Not a lot of information on products or claims.

### Plastic Spout and Screw cap for Pouches



Menshen

Location: Shanghai, China

Website: [www.menshen.com/en](http://www.menshen.com/en)

What's Up: No environmental data posted. They supplied the spout for Method's bladder,

The buzzkill: They're in China man!

## SUPPLY CHAIN ANALYSIS ... LABEL MAKING

### Paper



Monadnock Paper  
Location: Bennington, NH  
Website: <http://www.mpm.com/>

What's up: They are a great paper maker. Every paper they make is FSC certified and their mills are among the most ecologically progressive in the country.

The buzzkill: Okay, paper. Otherwise, none

### Gum Arabic or Hot Melt Adhesive Labels



Applied Products  
Location: Minnetonka, MN  
Website: <http://www.appliedproducts.com/>

What's up: Not as many independent providers of this technology as there used to be. They are quick to produce Material Safety Data Sheets and Certificates of Origin for their products.

The buzzkill: They're not really focused on sustainability. They are really just in the adhesive business.

### Crack and Peel Labels



PDQ Printing  
Location: New Paltz, NY  
Website: <http://www.pdqbiz.net/>

What's up: Quite expansive for a small town printer, PDQ offers a myriad of printing services. They also do a lot of work for a small business on sustainable solutions for the customer. They also try to assist small business through multiple avenues.

The buzzkill: Not much of one, other than they will not be very useful when the company expands and requires more aggressive sustainable solutions to their problems.

## SUPPLY CHAIN ANALYSIS ... PRINTING

### Silk-screen Printing



American Packaging Corporation

Location: Rochester, NY

Website: <http://www.ampkcorp.com/index.html>

What's up: Members of the Sustainable Packaging Coalition, these guys are actually three houses between New York, Wisconsin and Iowa. Their sustainable efforts are pretty good for such a small company and they publish sustainability reports each year, detailing their work. They look at people, planet and profit, though they never mention the triple-bottom line. Nice to do business with them.

The buzzkill: They haven't produced a sustainability report since 2009. Packaging and printing is historically a dirty industry with lots of strides being made in the last decade. It is easy to fold the efforts of others into your company's vision.

### Offset Printing



Green Earth Enterprise

Location: New York, NY

Website: <http://greenearthenterprise.net/>

What's up: Green Earth Enterprises is a multi-generational, family-owned print shop in midtown Manhattan. Owner Andy Hort is very focused on sustainable solutions to common printing problems. The quality at this shop is extremely high and some of the techniques are great whether for eco-friendly uses or conventional ones.

The buzzkill: Andy Hort is very egotistical. He shuns typical certification processes in turn creating his own. It is hard to monitor their work when they make up their own rules.

PDQ Printing

(see their listing under Crack and Peel Labels)



Greg Barber

Location: Denville, NJ

Website: <http://www.gregbarberco.com/>

What's up: This guy has been around for years. Supposedly, he started has always been in the printing biz but really changed his tune when he went to an Earth Day celebration in the 90s that was attended by a lot of children.

The buzzkill: Greg specs work through 3 or 4 plants and can be a little lax when it comes to quality control.

### Laminate Printing

See Mayor Packaging (last page)

Mayor handles the production of the substrate, the printing and the conversion.

## SUPPLY CHAIN ANALYSIS ... PACKAGING AND FULFILLMENT

Currently, Miles produces his sauce in the commercial grade processing kitchen for Wiklow Farms, in New Platz, NY. Their UV pasteurizer is a special piece of equipment that cannot be found in most commercial kitchens. But, if the kitchen were to give out, or the volume of sauce exceeded the machine's capabilities (unlikely), there is only one real option in the area.

The same holds true for packaging, boxing and inventory. Since the scale of operation is still small, the reasons for using a fulfillment service are almost nonexistent. But, if the operation were to expand significantly...

### Jennifer's Kitchen



Location: Mt Kisco, NY

Website: None

What's up: An off premises catering facility, which is open 7 days per week. It is the only option in the region for miles.

The buzzkill: There really are very few of these around and until we visit there is no telling how good this one is. It certainly won't have a UV pasteurizer. Will it?

### Capacity LLC



Location: North Brunswick, New Jersey

Website: <http://www.capacityllc.com/index.html>

What's up: An excellent fulfillment services company, they are acutely aware of the materials they use and what a resource intense service they provide. They claim NOT to use Styrofoam peanuts and that most of their employees DO NOT drive to work. That they work to see how they can adjust things regularly.

The buzzkill: Really? One rarely see Styrofoam peanuts in packaging these days and it's hard not to take public transportation to work in this region. They could probably get on board a little more legitimately....

## SUPPLY CHAIN ANALYSIS ... SHIPPING

### UPS



Location: Atlanta, GA (everywhere)  
Website: [http://www.ups.com/?loc=en\\_US](http://www.ups.com/?loc=en_US)

What's up: Been in business since 1907 and has been keeping on track with the sustainability movement for quite a while now. Everything from their cars to packing is assessed and an environmental impact report has been published every year for at least a decade. It isn't a gimmick to them and has been fully integrated into their business model.

The buzzkill: It's hard to really find one. For what they do, they are quite supportive of the little guy and have recognized the importance of sustainability in their work for years. There is always the issue of scale, however, and sometimes your efforts are like a band-aid on a gunshot wound.

### FedEx



Location: Memphis, TN (everywhere)  
Website: <http://www.fedex.com/us/>

What's up: The other major US shipping service, FedEx operates like a courier service on many levels. Speed is the name of the game with them, having virtually invented overnight shipping. They have a pretty aggressive (and recent) "earthsmart" campaign that focuses on mitigating environmental impacts of their work.

The buzzkill: The emphasis on speed at FedEx, is worrisome. Efficiency can help sustainability, but speed, as a driver, makes sustainability efforts hard to follow. Faster cars and planes equal more fuel used and less of a concentration on better resource and labor distribution. Also their hub system is intrinsically bad on the environment, with even a package from Moscow to Paris making a stop in Memphis.

### NEMF (with expansion)



Location: East Elizabeth, NJ  
Website: <http://www.nemf.com/>

What's up: A regional, family-owned trucking company, NEMF is great for shipping through the Northeast and into the Midwest. Not a large outfit, they are affiliated with several others who can move items greater distances. In the sustainability realm, they have taken advantage of new Jersey solar regulation and pushing to get their distribution centers off the grid.

The buzzkill: Not sure they care too much about the environment. Supporting small business is best, but trucking is really new to the sustainability racket. The way distribution centers work, they may end up seeing serious cost savings from their solar income use. Here's hoping they start a trend...

**SECTION F:**

# **PACKAGING PROPOSALS**

## **PACKAGING PROPOSALS ... INTRODUCTION**

Hot Sauce or Pepper Sauce is not as unique to the world as a food item. In fact, the style of preparation is common among many cultures and is (in many respects) ubiquitous as a jam or jelly. The manner in which one is manufactured can (at times) closely mirror preserves too. This is important because it means that Hot Sauces are essentially shelf-stable items intended for long term use. Hot sauce packaging needs to preserve the sauce, safely contain it, dose it correctly and appeal to the customer.

These factors are met by each and every 5oz woozy, but miss other important issues:

1. Product Dosing. For some reason, this is rarely mastered by the company. While yes, the product is the most important part, both product and package can go to waste due to improper dosing.
2. Weight. A 5oz woozy weighs about 6oz. So, the delivery system has a bigger impact than the payload and the customer is mostly paying for glass. Some other small bottles are even worse, but this case is bad enough. Lightweight materials, can reduce shipping or materials costs and make the customer feel better about their purchase.
3. Recyclability. Plastic caps and inhibitors are not really long term fixes for the woozy. They aren't recyclable and in the case of the inhibitor, they may "inhibit" recycling. Not that one can't pop them out, but who regularly does?

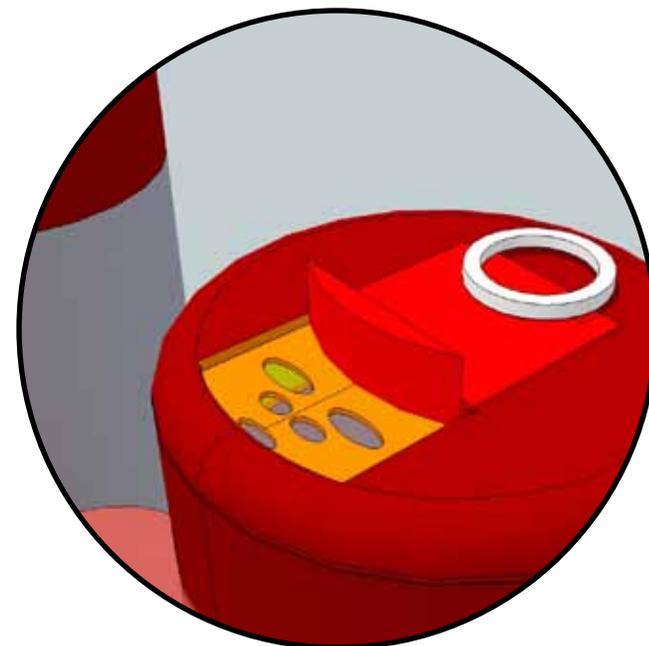
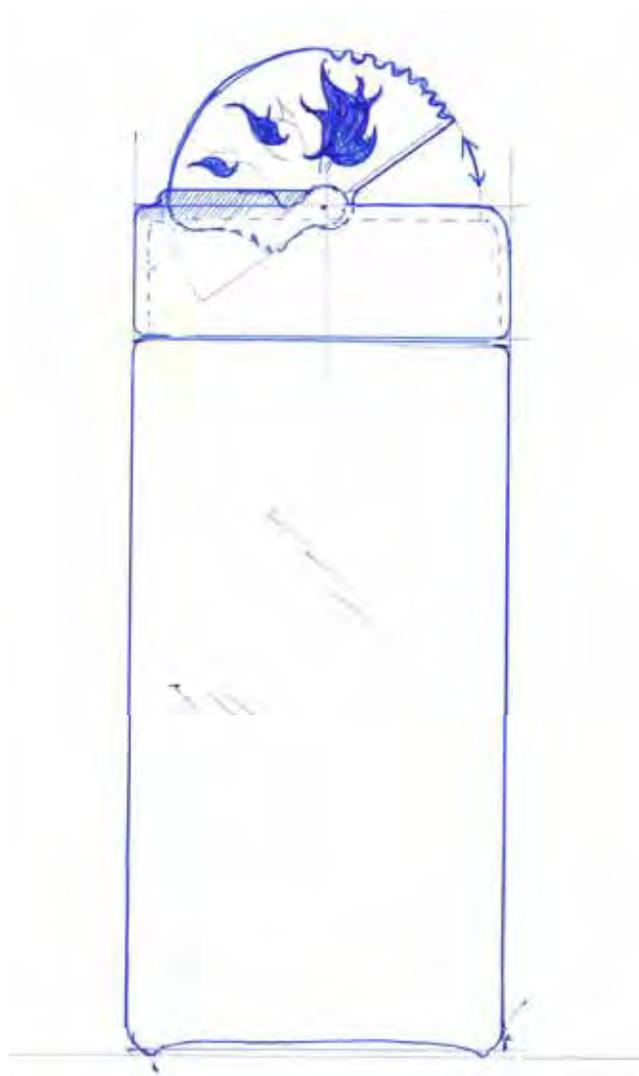
## PACKAGING PROPOSALS ... SQUAT JAR

Inspired by the Kikomom soy sauce jar and user observations about portion control, the squat jar is intended to reduce the amount of glass used in the package, reduce breakage, increase portion control, increase reusability and facilitate product disassembly at the end of life.

The jar is a simple paragon model, topped with a plastic cap based on an herb cap. It is adjustable and seals, keeping contaminants out longer.

A paper label with a gum adhesive or a crack n' peel adhesive can be used to brand the piece. As expansion occurs, silk-screen and ACL methods can also be used with ease.

Glass is still heavy,. Even though this presumably weighs less than a woozy bottle, it still weighs more than plastic and has to find it's way into a recycling stream to be reborn as a new glass. The cap will most likely be discarded under any circumstance.



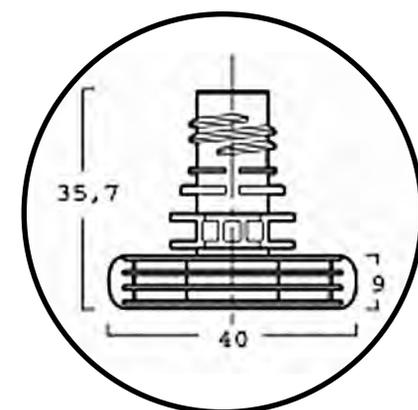
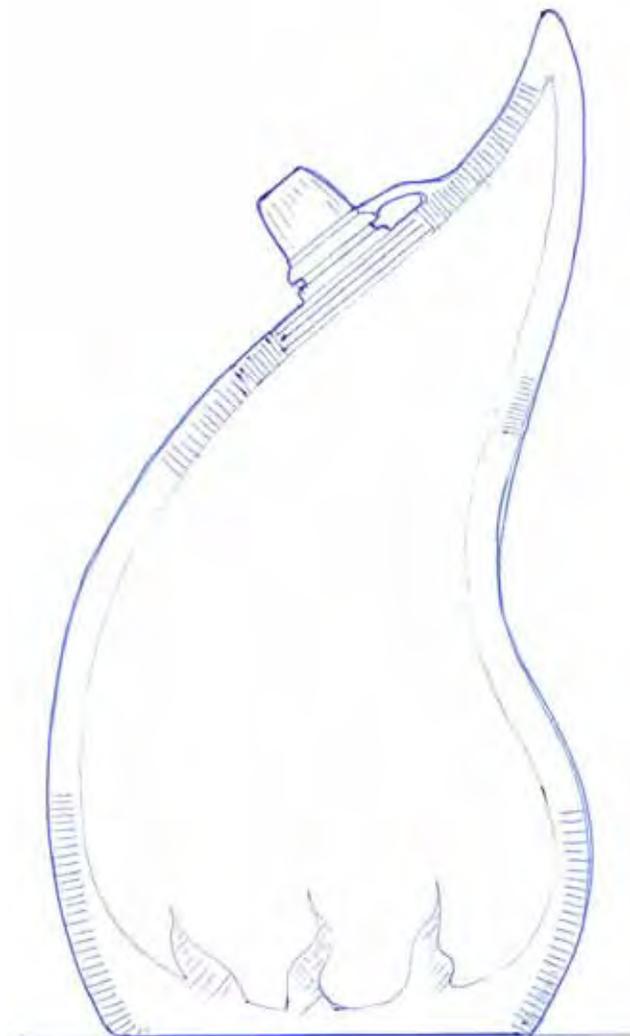
## PACKAGING PROPOSALS ... BLADDER PACK

Based on the Method Laundry Detergent refill pack, this is a wonderful short term solution that will create buzz. According to current estimates, when properly sourced and implemented, this execution supposedly outperforms the competition by a wide margin.

The polyethylene is not yet recyclable, but is reusable in many applications. Printing is very high quality and conversion is neither as energy nor as labor intensive as other options. With what is essential a hot pocket made from plastic, durability is extremely high and shipping weight ranges from barely more to significantly less than the product weight.

The user may find this option difficult. After all, the Method detergent pouch was designed for refilling the main dosing unit and just having the embedded handle made it ten times more controllable.

To match conversion to size and shape, a lot of experimentation needs to be done. Plus, it's going to have to be sourced from China for the time being. For a custom piece, that means long lead times and lots of sourcing issues.



## PACKAGING PROPOSALS ... TOOTHPASTE TUBE

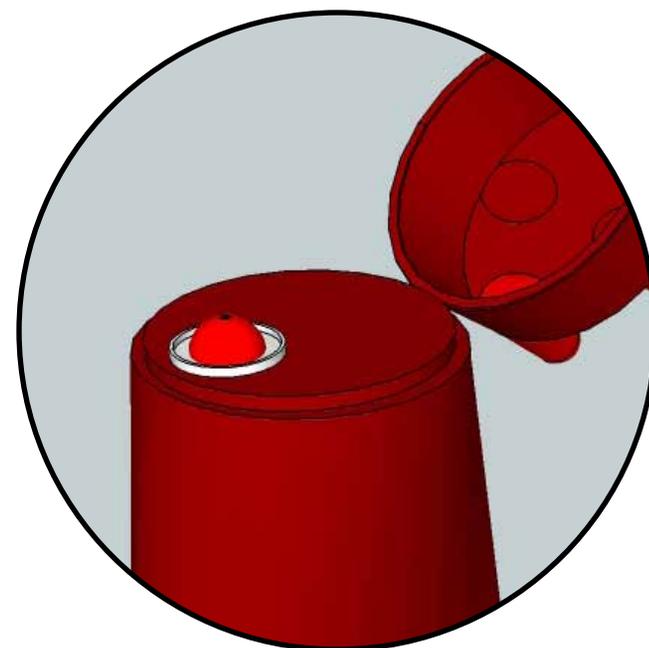
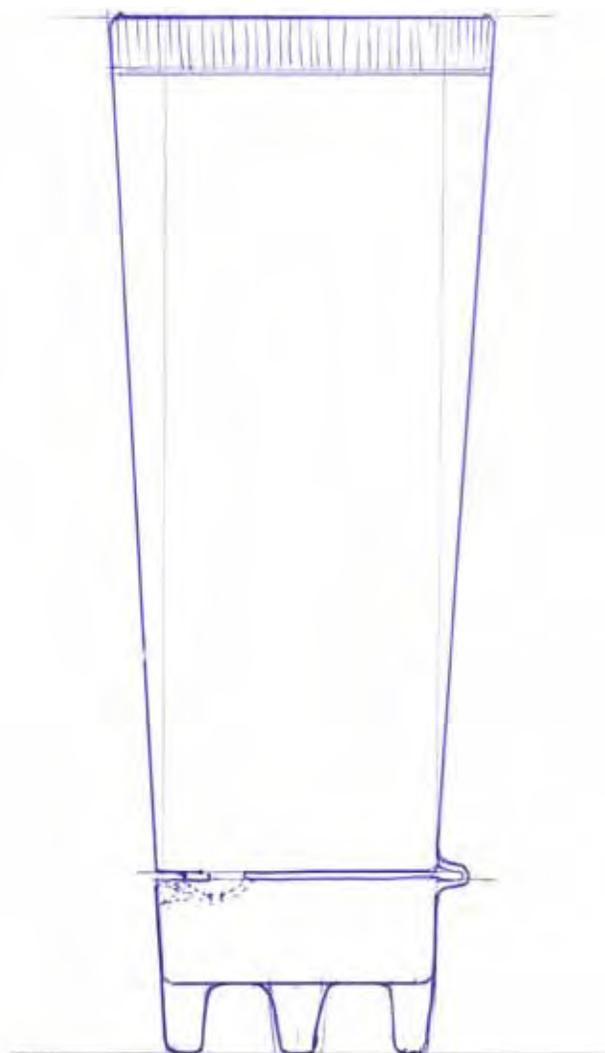
It's a weird thing when you try and come up with an influence from outside of the food industry, only to find out that it's been used by the food industry for so long that it's embarrassing.

Still, the tube has ample room for improvement. New PE tubes are replacing what has historically been aluminum or plastic barrier laminate. Printing can be done directly to the substrate, without another step needed for label application. With pure PE tubes, you have the ability to stick the product back in the recycling stream without much effort.

As anybody whom has ever used a tube for dispensing content knows, they are terribly easy for dosing and lightweight. They also have a small physical footprint that expands upward.

The dosing hole can be just that, a hole. It needs very little that can't be addressed by a squeeze. The downside for the user is that the hole can get very messy, quickly.

While PE is much better than Plastic Barrier Laminate for a lot of reasons, the factories producing these are still in Asia. They need to be shipped long distances and their material sources may be questionable at times.



## PACKAGING PROPOSALS ... GLUE TUBE

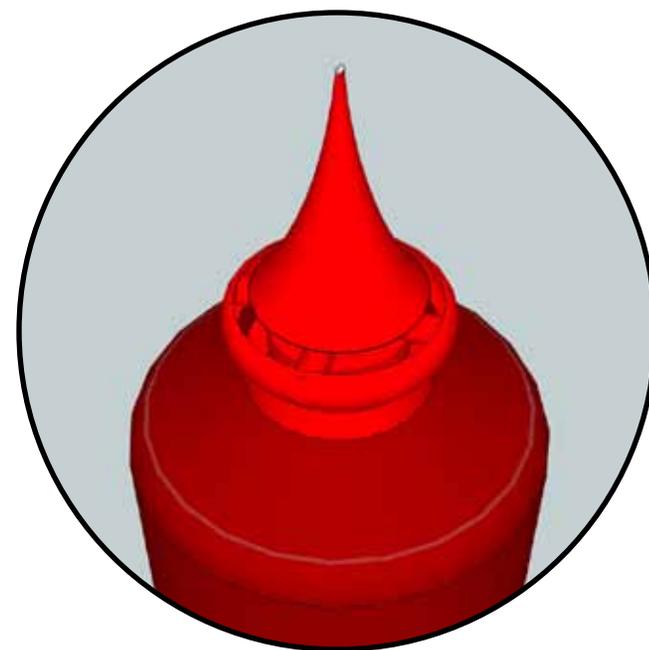
The best of so many worlds, the glue tube looks like a great candidate for Ornithology Sauce. It turns out that glue and hot sauce have similar needs.

Both need to have portion and flow control. Both need a cap that keeps the product from the environment, yet allows air transfer. Both products are prone to drying out and require moisture barriers. They also require strong packages that create a signature shape on the shelf.

One could use a standard squeeze bottle, but those have a problem with air transfer. The glue cap can be designed for as little air contact as possible.

The downside is that the whole thing would be HDPE and might require thought on it's disposal. It also might cause the user to overdose and create a poor product experience. Labeling would also need some consideration (Yupo, etc.) to help with recycling.

The piece would be very lightweight. One has only to check out the Huy Fong Sriracha to understand the strength of this package. But, the Sriracha bottle is just right for the ketchup-like substance and would not be suitable for more concentrated sauces.



## PACKAGING PROPOSALS ... COMPARE AND CONTRAST

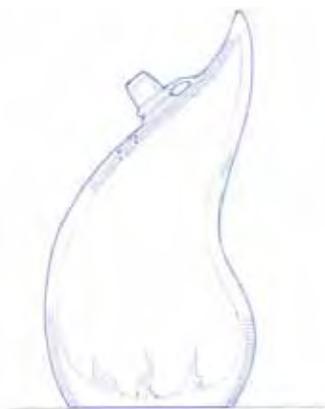


### Squat Jar

Applying attributes of herb bottles to the delivery of liquids. Aimed at reducing glass weight from traditional 5oz wozy application.

Pros: Builds on current standard technology. Components available. High quality closure maker right down the street. Easiest to get into recycling stream.

Cons: Glass is heavy. Adjustable lid will need work to be effective dosing device.

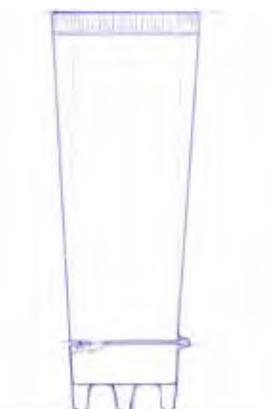


### Bladder Pack

Looking to the Method Brand Laundry Detergent refill. The aim is the lightest package possible.

Pros: Extremely lightweight and (according to reports) takes very little energy to make. Between custom shape and superior printing, will have excellent shelf pop.

Cons: Factories for this are currently in Asia in Asia. The material cannot be recycled either.

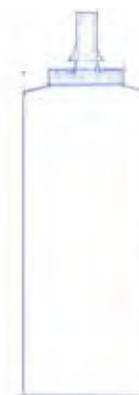


### Toothpaste Tube

Not an entirely new idea, it's application to hot sauce could be a game changer. Cap customized for sauce use.

Pros: Common technology. Lightweight and easy to handle. New PE versions can be made from up 69% post-consumer resin.

Cons: Not something readily accepted into the recycling stream. PE tube factories are in Asia.



### Glue Tube

Delivering small portions of highly concentrated liquid. This is able to address sustainability, utility and shelf life. It also looks cool.

Pros: Lightweight. Dose and flow control. Produced from HDPE and can be recycled. Can it be produced in USA?

Cons: Requires rethinking label stock and customer dosing practices. Recycling needs to be addressed.

## **PACKAGING PROPOSALS ... OBSTACLES & OPPORTUNITIES**

The four concepts presented in this section are really good. But that's about it. What may be the best execution this year, may be the worst solution next year. This is important to keep in mind when looking for sustainable options because as markets develop and resource models change, so does the supply chain and the energy inputs. Simply put, a product with low material cost that requires lots of energy to make may turn into the best option when lots of energy from solar and wind is present.

Of the concepts, our favorite would have to be the glue bottle. It seems to present solutions for every user need, marketing attribute and sustainable design cue available. Pretty cool that one solution might actually cover all the bases.

Let's team up and explore the sustainable possibilities for Ornithology. It's a sauce with several advantages in the current marketplace. Why not help it gain a foothold as a true category leader by creating yet another reason for consumers to purchase this sauce?

**THANK YOU**

**SECTION G:**

# **THE APPENDICES**

# SOURCES

## Data Sources

1. <http://www.cosmicchile.com/xdpy/kb/hot-sauce-history.html>
2. [http://en.wikipedia.org/wiki/Hot\\_sauce](http://en.wikipedia.org/wiki/Hot_sauce)
3. <http://www.austinchronicle.com/issues/annual/hotsauce/96/dates.html>
4. <http://www.tabasco.com/>
5. <http://www.franksredhot.com/>
6. [http://www.huyfong.com/no\\_frames/sriracha.htm](http://www.huyfong.com/no_frames/sriracha.htm)
7. <http://www.cholula.com>
8. <http://www.gracefoods.com>
9. <http://www.hotsauce.com>
10. <http://www.scottrobertsweb.com>
11. <http://goodhurts.blogspot.com>
12. <http://www.rappaportbottle.com>
13. <http://www.vbcpkg.com/>
14. <http://www.mayor.com.hk/>
15. <http://www.globalpack.biz/index.html>
16. <http://www.globeguardproducts.com/>
17. <http://www.seligsealing.com/>
18. <http://www.safetyseal.ca/index.html>
19. [www.menshen.com/en](http://www.menshen.com/en)
20. <http://www.mpm.com/>
21. <http://www.appliedproducts.com/>
22. <http://www.pdqbiz.net/>
23. <http://www.ampkcorp.com/index.html>
24. <http://greenearthenterprise.net/>
25. <http://www.gregbarberco.com/>
27. [www.provisormarketing.net/ourpartners](http://www.provisormarketing.net/ourpartners)
28. [www.rb.com/DocumentDownload.axd?documentresourceid=217](http://www.rb.com/DocumentDownload.axd?documentresourceid=217)
29. <http://www.capacityllc.com/index.html>
30. [http://www.ups.com/?loc=en\\_US](http://www.ups.com/?loc=en_US)
31. <http://www.fedex.com/us/>
32. <http://www.nemf.com/>

## Image Sources

1. **All sketches and Rendering in the Proposals Section are the property of Tom Haggerty, my friend and partner. The concepts are a collaboration.**
2. **All product and environmental photography was shot by the author and is intended to be purely informational and in no way represents the brand..**
3. **Page 45 Images sources from left to right:**
  - a. [http://bottleetc.com/glass\\_containers\\_bottles\\_jars/paragon\\_jars](http://bottleetc.com/glass_containers_bottles_jars/paragon_jars)
  - b. <http://www.lulusoso.com/products/Plastic-Shampoo-Bottle-Manufactuer.html>
  - c. <http://www.mayor.com.hk/company>
4. **Page 46 Images sources from left to right:**
  - a. <http://www.albea-group.com/catalog/laminate-tubes.html>
  - b. <http://www.reusablepackagingoptions.com/globe-guard-reusable-box-sealer>
  - c. <http://www.diytrade.com/china/pd/7111647.html>
5. **Page 47 Images sources from left to right:**
  - a. <http://www.ebay.com/itm/Great-Lakes-TS37-Side-Seal-Plastic-Overwrapper>
  - b. [www.menshen.com/en](http://www.menshen.com/en) (Screenshot from Promo Reel)
6. **Page 48 Images sources from left to right:**
  - a. <http://www.lcipaper.com/kb/podcast-1-monadnock-geoff-verney.html>
  - b. <http://www.prlog.org/11593091.html>
  - c. <http://www.bonodorinewpaltz.org/spons.html>
7. **Page 49 Images sources from left to right:**
  - a. <http://www.rit.edu/cast/mmetps/center-for-packaging-innovation.php>
  - b. <http://greenearthenterprise.net/> (Screenshot from Newsclip)
  - c. <http://www.flickr.com/photos/networkingnewarker/3555518762/>
8. **Page 50 Images sources from left to right:**
  - a. <http://www.cafeyasou.com/>
  - b. <http://www.capacityllc.com/index.html>
8. **Page 51 Images sources from left to right:**
  - a. <http://seekingalpha.com/article/151158-ups-delivers-poor-earnings>
  - b. <http://www.aircraft-wallpaper.com/2010/12/fedex-boeing-777f-test-flight.html>
  - c. <http://www.penjoy.com/shop9.html>

**SECTION G:**

# **FIELD OBSERVATIONS**

## FIELD OBSERVATIONS ... PATHMARK

Pathmark is a supermarket chain in the Mid-Atlantic area long the Eastern Seaboard. It has your usual supermarket features, long aisles and every out-of-season vegetable you can imagine. It is not a Whole Foods, the food is of varying quality and though organic foods are no longer in their own section, they are rarely present in more than one iteration of their conventional counterparts.

Two tricks to doing assessments of the competition. 1. Look at the entire store! Don't just perch in front of your product and it's immediate surroundings. There are a lot of in store displays that can't fit in the aisle and they are often found with other products they pair well with. 2. Don't ever "sneak" around in the store. Act like you know what you are doing and come armed with business cards. If a store clerk visits you, tell s/he exactly what you are doing and why. Even if they tell you to stop taking pictures, they will probably even answer a few questions and let you be.

Anyway, Pathmark is a lot better about where the different sauces are sectioned. While they have the condiment and international sections, these two aisles are adjacent and flow from one to another without interruption. A nice way to approach the cultural mix without alienating customers. Tuesday nights are not as busy as one would expect here (not that one day wins over the other, I just thought that it would always be busy in a New York City supermarket in a high transit area after work. People are (once again) very targeted in their shopping. I am definitely observing what most marketers cringe at the thought of: Brand Loyalty exists and governs more purchase decisions than you think!

The selection of hot sauces was much wider, though essentially relegated to the same groups and often in the same bottles -not all 5oz bottles mind you, but many of the same sizes repeated across brands or sauce styles. I had by now purchased a large cross section of sauces, but I really needed to find something different or I would go mad. The Jamaican selection had it: pickled Tabasco Peppers. To be clear, the pickled peppers were on another shelf. This was (even from bottle design) intended to be in the hot sauce section. I'd never seen anything like it. What a win.



## FIELD OBSERVATIONS ... TARGET

The Target in downtown Brooklyn isn't like most Targets. There is never any back stock and there is no street side presence. Also, because it's Brooklyn and not the most upscale joint, customer service is almost nonexistent. None of these issues stop the place from being packed. Lastly, because of the store size, there very few "family pack" options for the shopper and instead deals are based on multiple unit purchases.

The hot sauce (pepper sauce) is divided amongst 2 areas. The condiment section and the international foods section. International foods sections at supermarkets in the NYC area are not as extensive as in other areas. The primary reason being that there are extensive networks of specialty shops catering to the various ethnic groups in the city. I will visit a couple of them, just to make sure I hit all the angles.

So, in the condiment section, there are the usual Tabasco, Frank's Red Hot and I believe Texas Pete had recently run out. The International section was divided into a few subsections with hot sauce represented by Grace in the West Indian section (note, they produce a Scotch Bonnet sauce which is a type of pepper sauce, though I thought it was a marinade). Pace and Goya in the Latin section and Sriracha (Rooster Sauce) in the Asian section.

Nobody seemed to stop except to peruse the shelves and grab what they were already looking for. Careful review was not part of the shopping experience here. I think the pepper sauce was there in case you were buying something else and needed some spice.



## FIELD OBSERVATIONS ... BUON ITALIA & TRADEWISE

People forget that Italians have hot sauces too. Buon Italia is an import store in the Chelsea Market and though the prices are pretty high, it has a wonderful selection of contemporary Italian delicacies. The one significant issue with the store is that everything is displayed on pallets. So, like in a vegetable garden, one is constantly bending over to gather the groceries. It does, however, mean that the caps and lids are elevated in importance.

For being located in one of the hippest spots on Manhattan's West Side these days, I am surprised to find the store empty on a Sunday evening. Nonetheless, I weave my way through the island of tomato sauce and pasta, arriving upon the spot where I know the hot sauce will be. Tutto Calabria sells their "Hot Spread Sauce" and "Crushed Hot Chili Peppers" in practically the same pickle jar-styled glass with identical lids and labels. I grabbed one of each and after going around the store 3 times, I made my way to the register. The whole time, I never saw another customer. I feel bad. I should have bought some Italian sodas or something.

On my way home, I had a moment of clarity. Hot sauce falls primarily into 2 categories. Those for condiments and those for cooking. Both tend to have their preferred packaging, but this has largely been lost in the U.S. as the 5oz. Woozy has grown in popularity. Not that any sauce can't be used for both, but the applications mean different package requirements. The style of sauce can mean different openings. Much of this comes from hundreds of years of tradition. Some of it is based on a failure to plan for the end-user.

The south side of Clinton Hill is a confluence of White, Black, French, West Indian, Latin, African and Middle Eastern Cultures. All in full force. Tradewise has been around about 30 months. You can definitely tell that Tradewise is new and trying their best to make a good impression. The floors are spotless and the stock is perfectly maintained.

Tradewise is always pretty empty when I go in. It seems like they are struggling, in part from that and in part from the constant sales promoted on their shelves. The selection is terrible! Hardly more than the usual suspects. Once again, sales of what isn't moving. I wonder why that is. In a community as diverse as mine, there should be all kinds of sauce. I assume that people are shopping elsewhere. I am also finding that hot sauce has become a commodity. While brand loyalty exists, there is little entice customers into using something new.



## FIELD OBSERVATIONS ... HONG KONG SUPERMARKET

This is the real deal in Chinatown. Now, anybody will tell you that the big Chinese community lives in Flushing, Queens and they're right. However, the community is very suburban and difficult to maneuver without an automobile. I do not have a car. But, Manhattan Chinatown is nothing to turn one's nose at. A thriving community exists on and around Canal Street, through Little Italy and up to the Bowery. Many argue that the Manhattan Chinatown has lower prices than Flushing and just as much to choose from in cuisine. Naturally, there are exceptions to this, but as a whole Manhattan Chinatown has everything I'd expect from a Chinatown and that means large supermarkets with insanely low prices and fish tanks next to the meat counter.

Well, That is Hong Kong Supermarket. A supermarket with plenty of produce and supplies for your inner Asian. You will find many Chinese immigrants and Chinese Americans plunging through the aisles, looking for every art of noodle, sauce and sticky bun. But, they also have a full range of products for Koreans, Japanese, Thai and Filipino customers. The downside is that nobody on premises either knows or lets you know that they speak English. So, you have to be a good detective.

Upon entering the supermarket, one crosses one of the most diverse selections of produce I've seen since living in California. Amazing. Of course none of this is local that I can tell, but the selection is using the best the global supply chain has to offer. Straight ahead is the butcher and past that, along the entire length of the aisle (both sides) are sauces and condiments. Immediately, I spy an elderly lady grabbing about a half dozen of the same jar and putting them in her basket and scurrying away. Turns out, it is a spicy shrimp mix for cooking. Interesting, but not exactly what I'm looking for. Or is it? There are lots of different kinds of hot sauces on this shelf, some with tofu blended, some with beans, some with bamboo, too. But, the packaging is lackluster. There's only so much you can do with jelly jars. Interesting caveat, there was a whole shelf of American and Mexican hot sauces too. Looks like even the Asian stores have an "International" selection too.

I wandered the store for a few hours, looking for my staples of yesteryear and some things for my family (whole wheat ramen for my daughter and pocky for my wife, right?). After a space, I went by the Korean shelf and spied some college kids stocking up on seasonings and tofu, etc. Then I noticed these



red tubs going into their baskets. That's how the chili paste you get at Korean restaurants comes in the store! Shelf stable plastic tubs. Wow. It's a margarine tub but for hot sauce!

As before, customers weren't looking for new things, they were just looking for their favorite brand and taking it home, not giving the shelf a second look. I went back and stood by the Chinese condiment section for another half hour. The place was busy, but nobody was stopping. I spied the banana sue that the Filipinos are famous for and grabbed a bottle. It was the same as a glass ketchup bottle. Really neat to see it used in a different way, but since banana sauces still red, it threw me off. I walked out with my plunder and found the nearest train to Brooklyn.



**SECTION G:**

# **INTERVIEWS**

## CUSTOMER ETHNOGRAPHY ... TOM



Name: **Tom Haggerty**

Age: **49**

Occupation: **Account Supervisor for Furniture Fabrication Company**

Favorite Hot Pepper Sauce: **Tabasco Chipotle**

*Which of these is your favorite? What is your favorite hot sauce overall?*

"I dig the Sriracha sauce the most, but my favorite hot sauce has to be Tabasco Chipotle."

*Why that one in particular?*

"The smell is so warm and inviting. It's like aromatherapy for me."

*Well, what about these?*

"I have to respond to the packaging, right? I think all the Tabasco bottles have a unique tactile experience. The bottle feels like a little missile or a bullet. The cap is hard edged, not like a regular bottle cap. It sort of tells you what is going happen."

*Any others?*

"Maybe it's just me, but the Tabasco says premium. Frank's Red Hot looks smart but it reminds me of other condiments."

*They're the same company that makes French's.*

"That must be it. The wood cap on the Cholula looks corny and the Louisiana sauce kinda reminds me of a vinegar bottle."

*And?*

"The Scotch Bonnet bottle looks low-end."

*Note: Tom begins pouring the sauces out and then sampling them while he comments...*

"It looks like the sauces used for cooking are the thick ones. The thin ones look like they go in condiment containers."

*That's interesting.*

"Yeah. Damn, the Scotch bonnet is really hot but tasty at first. I get it, but I don't like it. I see that all the gunk gets stuck against the inhibitor and along the neck almost immediately. That stuff dries out and looks nasty. It's really with most of them. But especially Louisiana."

*You think that's because it's for cooking?*

"Maybe. The sauce is just too thick for the neck. Except the Scotch Bonnet sauce. The bottle looks good after a few pours. Funny, I think it has a few things in it to help with that. Yep, it has some additives."

*What about the Sriracha?*

"If I had to choose my favorite container from all of these, it would be the Sriracha. It's just so straight forward. Squeeze and squirt however much you want."

*You really like it, a lot...*

"Yeah, you know why? Because of my love of this stuff..."

*Note: Tom pulls out a squeezable Heinz 57 Ketchup bottle.*

"I put this on everything. I even mix it with horseradish for a little heat."

## CUSTOMER ETHNOGRAPHY ... JOSE



Name: **Jose Rivera**

Age: **64**

Occupation: **Retired**

Favorite Hot Pepper Sauce: **Tabasco**

*Which of these is your favorite? What is your favorite hot sauce overall?*

"My favorite is Tabasco, but I also love the hot sauce they give me at my favorite Chinese restaurant. It's very dry and very spicy.

They stopped giving it out unless you request it. People were coughing a lot..."

*Why Tabasco?*

"It's better for cooking."

*How do you prefer to use it?*

"Mexicans, we cook with chiles and hot sauce, but we always serve it like a condiment too, the way people have salad dressing on the side. People think it makes the food taste better. It's also good in Bloody Marys"

*Which do you know?*

"I know 3 of these bottles. The Tabasco, Cholula and the Sriracha. Cholula sucks and the wood cap is stupid. They're trying to look like the original stuff from where it comes. Sriracha is always on the table at the Asian restaurants, but it's too hot man. They also use it at taco trucks. Tabasco is everywhere."

*Try the bottles and tell me what you think. You can try the sauce too, but only to help form your thoughts about the containers.*

"They all work fine. I don't really mind the inhibitors much, sometimes less is better."

*Note: Even with the squeeze bottle, Jose takes the top off and pours. He is not interested in dosing mechanisms as long as he gets the right amount he needs.*

"I like the Louisiana the best, but I've never seen it before."

*Do you mind the inhibitor? The sauce came out really slow.*

"Not really, but I'd probably pull it out for better pouring."

*If you saw it on the shelf, would you buy it? Do you experiment?*

"Sometimes I check out the new hot sauces, but I always go back to Tabasco."

*If you're looking to try something new, what do you look for?*

"I look for the seeds. That means the sauce is the hottest. But I don't like it too hot."

What about your friends?

"Most Latinos make their own hot sauce. It's cheap and easy. Even if they can't cook."

## CUSTOMER ETHNOGRAPHY ... GINA



Name: **Gina Moore**

Age: **29**

Occupation: **Journalist**

Favotite Hot Pepper Sauce: **Peri-Peri Sauce**

*Which of these is your favorite? What is your favorite hot sauce overall?*

"I really like Peri-Peri (*pronounced peli-peli*) but of these, I enjoy the Scotch Bonnet sauce the most. Just so we're clear, I don't like the Tabasco. I never have. I'll avoid the bottles on the aisle.

*What about the Tabasco boxes?*

"That's what they do now? I guess it's different on the shelf. You know, hot sauce is one of those things that doesn't really change it's look."

*Note: Gina picks up Louisiana bottle and looks at label.*

"It's bright and loud and it looks like it's the same label as they had in the 60s. Hot sauce is really "working class" like beer. The labels are really bright and loud, even junkie. I really get overwhelmed by the bright colors really quick, so I tend to avoid the section. Though I probably wouldn't buy a well designed hot sauce bottle because it wouldn't seem authentic."

*What do you think of the others?*

"I like the Sriracha. It's like Ketchup. And the green top catches my eye"

*What about the other jars?*

"Oh no. I would avoid the jars. The bottles suite me fine."

*Why is that? Do they look hot?*

"No, I am afraid I'd use too much with a spoon. Just a few drops or squirts feels safer to me than a spoonful."

*What about bottles. Anything about them?*

"I don't like the inhibitor caps. I'd probably remove them. Also, small bottles remind me of Tabasco, so I stay away from them"

*Any others?*

"The Valencia sauce is great. Nice sauce, nice bottle size, nice top too. I had another bottle with the same top, but I broke it. I usually break spouts like that, so I try to avoid them."

*Anything specific to note?*

"Yeah. I like the yellows and the oranges (sauce color) from both look and feel. I also like the sauce thick. The runny sauces turn me off.

## CUSTOMER ETHNOGRAPHY ... SCOTT



Name: **Scott**

Age: **37**

Occupation: **Unknown**

Favotite Hot Pepper Sauce: **Hottest he can find**

Background: **While studying the competitive environment in Pathmark, I spied a young man with his daughters hitting the shelves and checking the circulars he brought for deals. In a moment of pause, I decided to ask him a question or two.**

*Hey, can ask you a couple of questions?*

"Sure."

*I can see you're putting a lot of time into this.*

"I care about food and what my family eats."

*Tell me, which hot sauce do you prefer from all the ones here in this aisle?*

"You're holding it."

*Sorry?*

"The peppers." (he referred to a bottle of Tabasco peppers in vinegar which I grabbed in the Jamaican hot sauce section)

*Oh, cool.*

"Yeah, they bring the heat really well, but I have to be careful cooking for my kids. Usually, you want the smallest bottle. It has the most power, but also the most control. Don't get Red Devil. Everybody buys that and it's no good. But, people buy it..."

*What about the vinegar based ones like Louisiana?*

"Yeah, they are good, but only for Gumbo and Chili and such."

*Do you think that brand loyalty plays a big part in people's choices?*

"Oh, totally. And it sucks because people should keep trying new things."

*Well, cool. Thanks for the help man.*

"Sure thing. Have a good one."

Follow-up: **While this does not fit the model of the other Q and A sessions I have been holding with customers, this dialog imparted two valuable pieces of information.**

### **1. Flexible Brand Loyalty.**

Heat is the attribute that hard-core hot sauce lovers seek. Their allegiance can change with a superior product. Not that they have yet, but they are willing to expose themselves to that opportunity.

### **2. The rest of the Household counts too.**

Could a baby-boom cause a drop in sales? Does it help condiment hot sauces and curb the hot sauces for cooking? People don't like to eat alone and their cooking will be heavily influenced by whomever sits across the table from them.