

Balaton Chocolate Wafer Bars Package Repositioning Proposal

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Introduction

The following is an analysis and proposal for a more sustainable packaging solution for the Balaton Bar. The Balaton Bar is made by Nestlé. The Nestlé company has committed to transitioning 100% of its packaging to be recyclable or reusable by the year 2025. In an analysis done of the recycling program in Hungary, many flaws in the recycling program were discovered. All trash for the country and many recyclable items end up in the incinerator. This analysis and proposal are centered around this knowledge, knowing that burning is a highly probable end result for the packaging materials of the Balaton Bar.



Image: The Balaton Bar, Original Milk Chocolate Flavor [13]

Introduction: History

In 1880 Hungary's first biscuit factory opened in the town of Győr. This same factory would later go on to create the first Balaton bar starting in the 1950's. In 2008 the Balaton bar was sold to the Swiss company Nestlé, where it transitioned to the modern packaging style seen in stores today.

The Balaton bar is named after Lake Balaton, Hungary's largest lake and a source of great pride for Hungarians. It's a beautiful freshwater lake in the western region of the country, stretching about 50 miles wide. It's a major holiday destination for Hungarians and foreigners alike. It's no surprise then, that the Balaton bar's wrapper dons a shiny blue color and the image of water.

The original Balaton szelet (meaning "bar" in English, pronounced like "sell-et") is made up of multiple layers of crunchy wafer and chocolate cream, all dipped in a milk chocolate coating.



Image: Map of Hungary [15]

Introduction: Growth + Revenue

In 2015, there were 287 enterprises in the manufacture of cocoa, chocolate and sugar confectionery industry in Hungary. Revenue in the chocolate confectionery sector as a whole amounts to \$200 million annually. The projected revenue of the manufacture of cocoa, chocolate and sugar confectionery within Hungary will amount to approximately \$289 million by the year 2022.

The average per capita consumption of confectionery items currently stands at 4.63 lbs. In addition, the average price per unit in the market for chocolate confectionery currently amounts to US \$9.94.



Image: Cocoa powder [5]

Competitive Analysis

The following is a competitive analysis of the products in direct and indirect competition with the Balaton Bar in the Hungarian market. All data and information was gathered in the town of Pápa, Hungary.

The Competition: Hungarian Chocolate Bars

A Hungarian brand chocolate bar in competition with the Balaton bar is the Sport XL bar. It doesn't have a wafer component. It has a layer of dark chocolate which envelops a light cocoa-fondant filling, enhanced with the essence of rum flavor.



Image: Sport XL Bar [3]

Competitive Analysis

The Competition: Other Chocolate Wafer Bars

MANNER

Manner are high quality wafers lined with hazelnut cream. They're created by the Josef Manner & Comp AG.

KIT-KAT

Kit-Kat bars are a thick, milk chocolate covered wafer. They're created by Nestlé.

BUENO

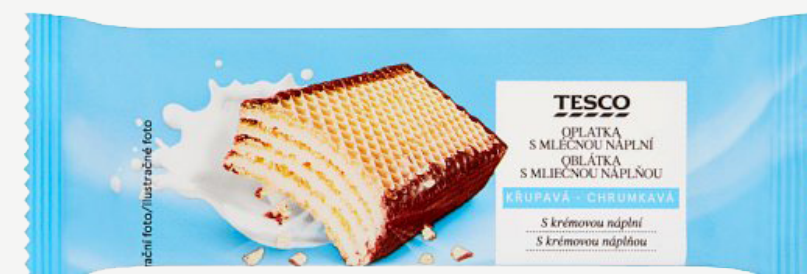
The Bueno bars are milk chocolate covered wafers with a creamy chocolate center. They're created by Kinder under the larger brand Ferrero SpA.

TESCO WAFER

Tesco brand's dense wafer bar has thick layers of wafer and vanilla cream with an outer rim coating of milk chocolate. They're created by Tesco PLC.

MOMENTS

Cocoa coated crispy wafers with a milk cream filling. Created by I.D.C. Holding.



Images: Manner Bar, KitKat Bar, Bueno Bar, Tesco Wafer Bar, Moments Bar [13]

Competitive Analysis

The Competition: Indirect Competitors

SNICKERS

A Snickers bar is a sweet nougat topped with caramel and peanuts that has been dipped in a milk chocolate coating. They're created by the company Mars, Incorporated.

MARS

Mars bars are a mixture of nougat and caramel that have been dipped in a milk chocolate coating. They're also created by the company Mars, Incorporated.

BOUNTY

Bounty bars have a coconut flake filling and are coated with a milk chocolate layer. They too are created by the company Mars, Incorporated.

MILKA

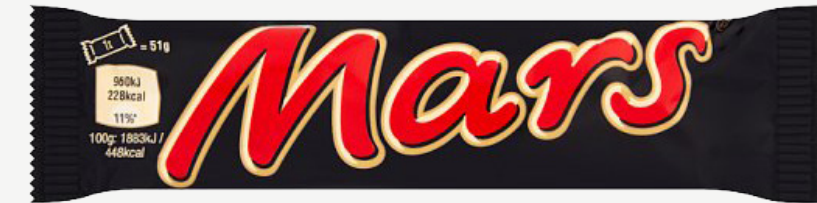
Milka bars are a thin, flat, solid milk chocolate bar. They're created by the brand Mondelez International.

TWIX

Twix bars come two to a pack and have a biscuit topped with a caramel mixture that's been dipped in a milk chocolate coating. They are created by the company Mars, Incorporated.

NUTELLA B-READY BAR

These are individual biscuit bars that have been filled with the Nutella hazelnut spread and cocoa. They're made by the company Ferrero SpA.



Competitive Analysis: Store Shelves

Shelf shots were taken at the three main grocery stores and the main convenience store in the town of Pápa, Hungary. The grocery stores placed Balaton Bars on the shelves just below eye height, while the convenience store placed the Balaton Bars on the bottom shelf.



Tesco
(grocery store)



Aldi
(grocery store)



Interspar
(grocery store)



Euro Family
(convenience store)

Market Analysis

The following is a look into the market segment for the Balaton bar, a chocolate and wafer candy bar sold predominantly throughout the country of Hungary. To gain insight into consumer's choices, focus groups and ethnographic interviews were conducted and analysed. This analysis was conducted in the form of a survey given to a diverse group the northwestern region of Hungary, in the town of Pápa.

Results: Overview

Because the Balaton bar is predominantly sold in Hungary and is linked to the heritage of the country, opinions were sorted into two main groups: Hungarians currently living in Hungary, and non-Hungarians currently living in Hungary. Almost everyone included in the analysis had tried a Balaton bar before. Every Hungarian was very familiar with the product and had tried the bar for the first time in their childhood.

On average, Hungarians purchase Balaton bars more frequently than non-Hungarians. It seems to be a common purchase centered around certain holidays and birthdays. For non-Hungarians, many purchased a bar to try within the first few months of their first moving to Hungary, but this infrequently led to repeat purchases.

Market Analysis

Results: Packaging

There was a distinct difference in the views of the Balaton bar's packaging between the two groups. Hungarians tended to view the packaging as more nostalgic and enticing. It doesn't seem to bother them that there's no description on the label about what type of bar a Balaton bar is, because they say everyone just knows this because everyone is inherently familiar with the Balaton bar. The general color scheme of the packaging appears to be appealing to all audiences, and in general everyone viewed the packaging itself to be easy to open and typical for a candy bar. Non-Hungarians, while they mostly found the packing to be appealing to the eye overall, found the packaging to be confusing and lacking any clue as to what type of item was inside. It was commonly noted as not seeming like candy, and having an overall cheap feel.

Recommended changes included making the packaging seem more luxurious, making it more obvious that candy was inside, and making it seem more "chocolatey." In every store, the bars are displayed within Balaton branded cardboard boxes on store shelves. These boxes stick out because of their bright yellow color. However, the boxes have similar branding to that of the bars and also include no further information or further details about what type of candy bar a Balaton bar actually is. While it's placement on shelves tends to be directly by the other wafer candy bars, there's no information given on the branding that would tell a customer anything about the bar consisting of wafer layers.

Results: Price

The average cost of the Balaton bar in Pápa, Hungary is \$0.27 USD per bar. While Hungarians consider this to be simply on the "lower end," non-Hungarians find this to be exceptionally inexpensive. Price also seemed to play a much larger role in the decision making of Hungarians, whereas non-Hungarians put much less emphasis on cost than on other factors like looks and whether it contains chocolate.

This in some part could be due to the effects of non-Hungarians purchasing items in a foreign currency. They are more likely to look at the price in Hungarian Forint (HUF) on the shelf, and do a very generalized rounding of the price in their heads, or take the extra step of pulling out their phone to type in the exact price conversion. Whereas Hungarians obviously have a full grasp of their native currency, and have the benefit of knowing the exact price comparisons on the spot.

Average Price of a Balaton Bar = \$0.27 USD

Market Analysis

Results: Competition

When presented with the three main chocolate wafer bar competitors - Manner, Kit-Kat, and Kinder Bueno - there was a clear winner as to who was considered to have the best packaging. The Manner wafer bar is considered a more high-end candy, and costs more than the rest of the competition. The packaging is considered to be classy, elegant and clean with a calming and comforting font. The wider shape of the bar itself makes it appear as though you're receiving more of the product than with the other competitors. It was also noted that the physical wrapper feels of greater quality than that of the others, and that the element of the inner foil wrapping makes it appear more expensive and high end. It also includes an enticing image of what's inside included directly on the front of the package, leaving nothing up for question.

Summary

Overall, the Balaton bar's packaging seems to rely heavily on its ties to history and its nostalgic pull of the consumer. For anyone who isn't a native Hungarian and doesn't have this element of nostalgia, when left to consider the bar's package simply for its visual and tactile elements, the bar presents more confusion and less of a reason for choosing it over more appealing packaging. Even being at a lower cost compared to the Manner bar, customers are more likely to decide to spend a little extra for a more enjoyable packaging experience, to know exactly what they're getting, and for a superior product.



Image: Manner hazelnut chocolate wafer candy [18]

Structure Analysis

The following is a look into the current packaging materials used for the Balaton Bar and its top competitors, as well as an exploration into potential alternative, more sustainable options.

Structure Survey

Candy wrappers are overwhelmingly made from the two same materials on average - polypropylene and/or aluminum. The Balaton Bar, like many of its counterparts, has a wrapper made of polypropylene that is bonded with a very fine layer of aluminum lining the inside. The aluminum is very efficient at keeping the contents safe from exposure to heat, light, moisture and other external factors that threaten to compromise the item.

Aluminum by itself is highly recyclable and can be reused many times before it loses its integrity, giving it great potential for improving sustainability efforts. However, when aluminum is bonded to another material, such as polypropylene, it must be separated first which is an energy and time intensive process many recycling companies aren't willing to do. There's also such a micro-thin layer of aluminum used that recovering it once it's been bonded to another material isn't realistic, thereby making the entire package unrecyclable.

Polypropylene can be recycled up to 4 times before it reaches its degradation point. While it's nice in theory to be using a material that has high recycling potential, many candy wrappers are so small and thin that they aren't seen as worth it for many recycling companies. As a result, while many candy wrappers are made from these easily recycled materials, they most often end up going directly into landfills because the materials are simply too difficult to separate on such a small item such as a candy wrapper.

Structure Analysis

#1 Balaton Bar

Recycling number: #5 PP
Materials used: Polypropylene, Aluminum
Package measurement: 5" x 1.5" x .75"
Product total weight: 30g
Total packaging weight: .6g

User and product needs: The wrapper is very thin, and is sealed using glue. The outside of the packaging includes shiny metallic coloring. It has the more traditional design with ridged edges on the sides for easy "tearability."

It's challenging to open this wrapper without tearing off smaller pieces of the wrapper while opening. The package is also noticeably filled with air, providing extra protection to the product inside from external damage. It has a very thin, inner aluminum layer.



#2 Manner

Recycling number: C/PAP
Materials used: Aluminum, Paper, Polypropylene
Package measurement: 4" x 3.5" x .5"
Product total weight: 80g
Total packaging weight: 2.7g

User and product needs: This is by far the most sophisticated and "high quality" wrapper from all observed in this survey. The wrapper is sealed using glue. A plastic, red strip with a small pull tab runs along the top of the package. Pulling the tab tears the wrapper open. Once the tab is pulled, it comes off and is a separate part to be disposed of. Once the package has been opened in this way, the user then has to additionally fold down the sides of the package which takes more time than any of the other packaging observed. It was also impossible to get to the candy without then tearing through the remainder of the packaging with your hands. The package had no air fill but has a thickness to it that provides good protection.



Structure Analysis

#3 Sport Bar

Recycling number: None provided
Materials used: Polypropylene
Package measurement: 5" x 1.25" x .5"
Product total weight: 31g
Total packaging weight: .6g

User and product needs: This packaging is made from extremely thin plastic and doesn't use any aluminum, leaving it more susceptible to moisture or heat damage. It is sealed with glue. It was challenging to open the package without tearing off a small piece of the plastic. The company does not provide any recycling symbol on the packaging itself. It has the more traditional design with ridged edges on the sides for easy "tearability." There is a small amount of air fill, and there's excess packaging material on the right and left sides of the bar.



#4 Kinder Bueno Bar

Recycling number: PP
Materials used: Polypropylene
Package measurement: 6.25" x 2.25" x .75"
Product total weight: 47g
Total packaging weight: 1.8g (1.1g + .7g)

User and product needs: This package by far seemed to waste the most amount of material. There are two different packaging wrappers used. First, the two individual sticks are wrapped in the outer wrapper, which is lined with aluminum on the inside to protect the bar. Once the outer package is opened, the two chocolate sticks are then each individually wrapped in an additional clear plastic. The shape of each stick is also comprised of four "humps" where there is wasted space in between each hump. There's also a large amount of air sealed inside the wrapper as an additional protection to the sticks, which makes sense given their more delicate nature.

Both the inner and outer wrappers tear easily and are very thin. They shred off smaller pieces easily when trying to open. The inner packages have red plastic pull tabs to easily tear the plastic open and reveal the chocolate stick, leaving small bits of plastic behind.



Structure Analysis

#5 Kit Kat

Recycling number: #5

Materials used: Polypropylene, Aluminum

Package measurement: 4.75" x 2.5" x .25"

Product total weight: 42g

Total packaging weight: .5g

User and product needs: This is another more traditional design with ridged edges on the sides for easy "tearability." There no noticeable air fill or excess packaging. The plastic is more of a medium weight comparatively, and doesn't tear so easily into smaller pieces - it was easier than others to keep the wrapper in one piece when opening. Aluminum lines the inside of the wrapper to protect the bar.



#6 Moments Bar

Recycling number: #5

Materials used: Polypropylene

Package measurement: 6" x 1.75" x .75"

Product total weight: 52g

Total packaging weight: .7g

User and product needs: This is yet another wrapper using the more traditional look with ridged edges for easy "tearability." It's extremely thin and tears easily into smaller parts when opening. It has no aluminum lining, leaving it more susceptible to heat or moisture damage. Being as the bar has more wafer than chocolate, this type of protection may not be as necessary as with other bars. It has excess material and space on either side of the bar.



Structure Analysis

#7 Tesco Wafer Bar

Recycling number: #5

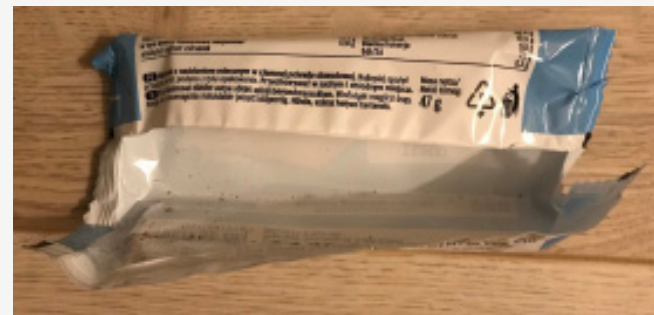
Materials used: Polypropylene

Package measurement: 6" x 1.75" x .75"

Product total weight: 48g

Total packaging weight: 1.3g

User and product needs: This is a very obvious direct rip-off of the Moments Bar. The bars are the same shape, size and flavor. Their packaging is also extremely similar, even using almost an identical shade of blue. This bar, however, has noticeably thicker and sturdier plastic compared to all the rest in this survey, making the bar very protected from being crunched when placed in a pocket. It has no aluminum lining, and it has a lot of excess material and space on either side of the bar.



Structure Analysis

Cross Product Inspiration + Opportunities

In considering this product, aluminum continued coming up as a potential option. In and of itself it's highly recyclable, lightweight, and very functional for preserving many foods, but especially for chocolate bars and protecting them adequately. Many pre-made foods being sold are wrapped in foil. If there were a way to eliminate the bonding of plastic with foil for a candy wrapper, this could be a potential way to still get all the benefits of the foil without sacrificing ease of recyclability.



Image: Sandwich wrapped in foil [24]

Supply Chain Analysis

The following is a deeper look into available vendor and packaging opportunities for the Balaton Bar, and what it will require to make them a possibility.

All potential suppliers and vendors are assessed and using The Sustainable Packaging Coalition's (SPC) guidelines.

Hungary relies on incineration to manage its waste. Apart from metals, other recyclable materials such as plastics and paper are also sent to be incinerated. This factor played largely into the three alternative packaging materials considered in order to minimize negative impacts throughout the entire life cycle of the package.

In researching viable solution options, a number of factors were considered: What happens to the material when it's burned? Are harmful chemicals released? How far will this material have to travel before arriving at the Balaton Bar factory in Hungary? By what means of travel and what are the environmental implications of that travel? A focus was put on finding suppliers within reasonable distance within Europe to avoid the use of air travel for the transport of these materials.

Supply Chain Analysis

Potential Vendor Partners

RECYCLED PAPER

Paper, as long as it hasn't been combined with other harmful materials or inks, can be burned safely and without producing harmful gas. The use of recycled paper over virgin paper is advantageous because less raw materials were required to create it.

Budafox Recycling in Szentendre, Hungary is a paper recycling facility that provides paper to a sister company, the Belovo Paper Mill in Bulgaria.

ALUMINUM

European Aluminum is headquartered in Brussels and provides a wide variety of aluminum products, including foil.

BIOPLASTIC

NaturePlast is located in La Dronnière, France and is a leader in bioplastics. The most promising contenders are bioplastics created using materials from hemp, and from sugar cane.



SOY WAX

Cargill is a wax company which produces a variety of plant based Naturewax® Vegetable Waxes. The nearest distributor to Hungary is the Assistance Distribution Chimie in Chateauneuf du Rhône, France.

GLUE

Hernon Manufacturing Inc. is a glue and adhesives company with a distributor in Komarno, Slovakia. They offer a number of water based, non-toxic glues that perform on both paper and plastic.

INK

EnNatura is a company in New Delhi producing eco-friendly inks.

InkTec and Jetrix. These are two companies working together to provide more sustainable printing solutions. InkTec makes a variety of eco, solvent inks. Jetrix is the company making the printers on which these inks can be used.



Supply Chain Analysis

Vendor Criteria

The following is a list of questions to ask vendors and suppliers before embarking on a partnership:

1. Is it beneficial, safe and healthy for individuals and communities throughout life cycle? Does life cycle of the materials get considered when making decisions? When considering materials to use, how much priority is given to cost versus safety?
2. Meets market criteria for performance and cost? What is the optimal length of performance time you're seeking for this specific material? What unique challenges come up when balancing cost versus performance?
3. Is sourced, manufactured, transported, and recycled using renewable energy? How is your plant powered? What are the main types of transportation used for import and export of materials to/from factory? Where are items sourced from and what are the largest factors that played into choosing those sources over others? Which materials can be recycled and what method of recycling is required?
4. Optimizes use of renewable or recycled source materials? In what ways are excess materials utilized?
5. Is manufactured using clean production technologies and best practices? Has a life cycle analysis been performed at your factory, or the factories of those providing your supplies? What are the largest areas of waste and pollution in your production process?
6. Is made from materials healthy throughout life cycle? What affects the integrity of the material - specific heat/cold levels? exposure to oxygen or certain chemicals? time? Can the material be contaminated in any way?
7. Is physically designed to optimize materials and energy? Are there other materials available that can achieve the same results? How much does the shape and size of the object affect production?
8. Is effectively recovered and utilized in biological and/or industrial closed loop cycles? Are any elements biodegradable? Are you able to utilize a recycled version of the material?

Repositioning Proposal

The following is a deeper look into three alternative options for creating more sustainable Balaton Bar packaging, and what it will require to make them a possibility.

Hungary relies on incineration to manage its waste. Apart from metals, other recyclable materials such as plastics and paper are also sent to be incinerated. This factor played largely into the three alternative packaging materials considered in order to minimize negative impacts throughout the entire life cycle of the package.

In researching viable solution options, a number of factors were considered: What happens to the material when it's burned? Are harmful chemicals released? How far will this material have to travel before arriving at the Balaton Bar factory in Hungary? By what means of travel and what are the environmental implications of that travel? A focus was put on finding suppliers within reasonable distance within Europe to avoid the use of air travel for the transport of these materials.

| Packaging Option | Total Materials Required For Packaging | Total Materials Requiring Recycling | Energy Input Requirements |
|---|--|-------------------------------------|--|
| Option #1: Recycled Paper + Soy Wax | 4 | 0 | Recycling paper requires the use of water to remove inks, films and glues. Soy wax is derived from soy oil, which requires growing and harvesting soybeans and extracting the oil. |
| Option #2: Recycled Paper + Aluminum Foil | 4 | 1 | Recycling paper requires the use of water to remove inks, films and glues. Virgin aluminum is first extracted from the earth via electrolysis, requiring heavy energy and machinery usage. |
| Option #3: Bioplastic (Hemp) + Soy Wax | 3 | 0 | Bioplastic generation requires greater input of energy. Soy wax is derived from soy oil, which requires growing and harvesting soybeans and extracting the oil. |

Repositioning Proposal

Option #1: Recycled Paper + Soy Wax

The required materials for this option are recycled paper, soy wax, printer ink, and glue to seal the paper together airtight.

A layer of soy wax will be bonded to the inside of the paper wrapper, and glue will be used to seal the paper edges together to make it airtight. The positives to this approach are that if this product inevitably ends up in an incinerator, it will let off a significantly lower amount of harmful chemicals, if any.

Option #2: Recycled Paper + Aluminum Foil

The required materials for this option are recycled paper, aluminum foil, printer ink, and glue to seal the paper together airtight.

The chocolate bar would first be wrapped entirely in aluminum foil before being placed inside the paper wrapper to be sealed. The positives to this option are that the aluminum foil is kept separate from the paper, so it can be recycled easily. However, a downside is that more aluminum foil is required with this method, as compared to when an ultra-thin layer of aluminum is bonded with the outer wrapper. It would also rely on the consumer placing the aluminum portion of the wrapper into the recycling bin.

Option #3: Bioplastic (Hemp) + Soy Wax

The required materials for this route are bioplastic made from hemp, soy wax, printer ink.

The bioplastic can be sealed using heat, avoiding the need for the use of glue to create a seal which is a benefit. A positive is that this option would be completely plant based. However, the generation of bioplastics uses more energy than recycled paper to produce.

Next Steps

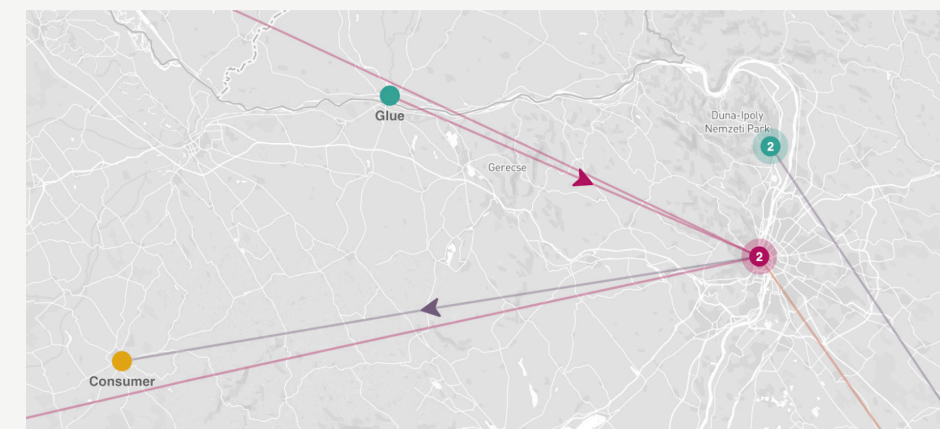
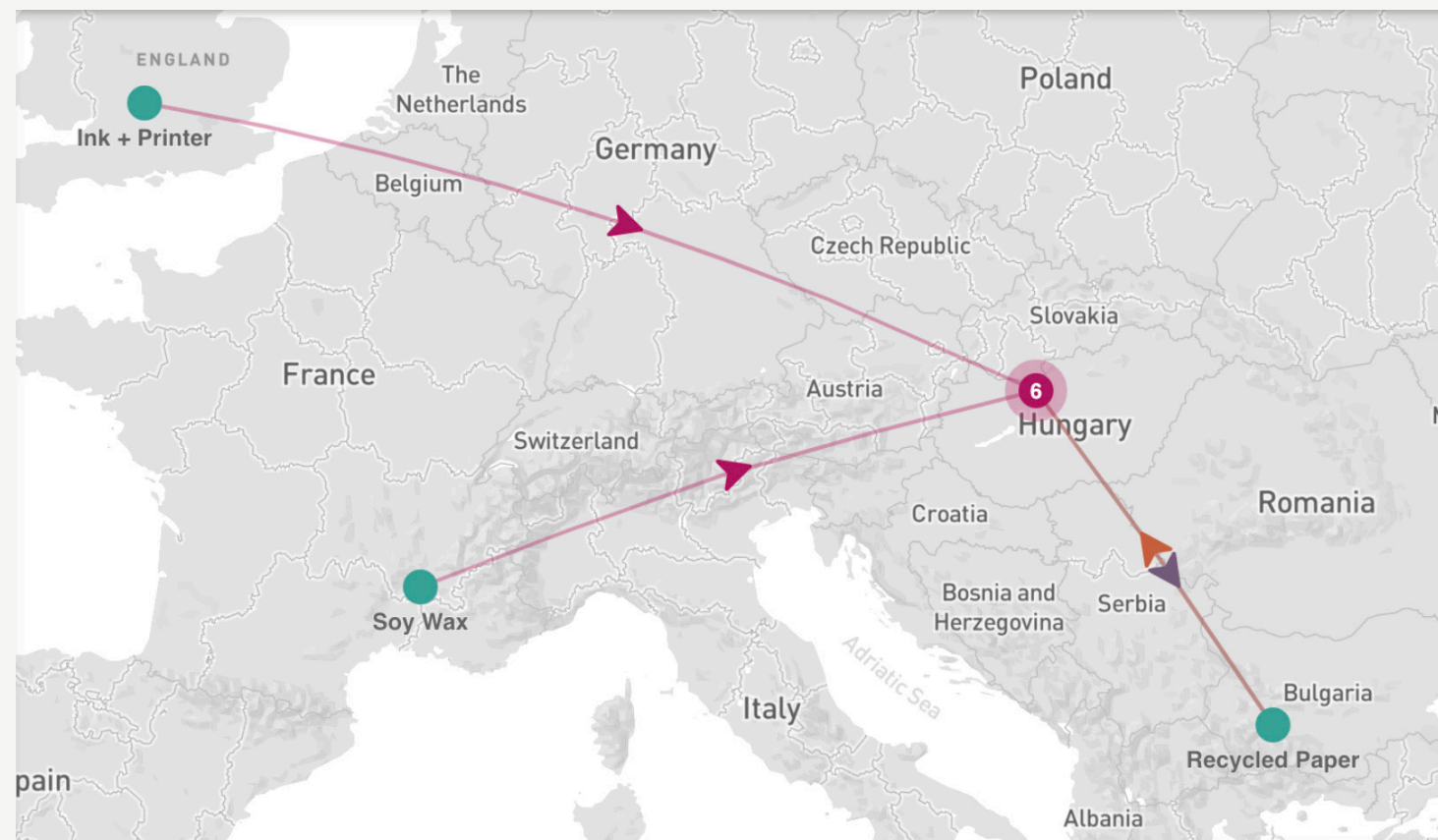
Opportunities: Option #1

The most promising option would be to use recycled paper and soy wax for this particular packaging. Both of these materials can be burned while producing little to no negative fumes or chemicals as a result. Of course, this requires the use of inks that are also equally as harmless, as well as a harmless adhesive. What's better than using an adhesive, would be to find a way to bond the paper via heat or some other means, without the need for an additional adhesive material to be required at all. This is a point for further exploration to determine what is out there and what is possible for bonding paper to paper in an airtight manner without adhesive use.

Another thing to consider is that incineration plants typically include a step where a machine goes through the ash after burning to draw out remaining metals. Whether or not the focus is on ferrous metals, versus non-ferrous metals (or both) seems to be dependent on the specific plant. However, this is an option to look further into and to investigate which practices are taking place in Hungary, as the metal that's been burned can still be recycled and reused, which holds promise for metal that ends up in a garbage can instead of the recycling bin.

Next Steps

This map details where around the world materials would be sourced from for this recycled paper and soy wax packaging option.



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Thank You