

# BrandWizard® Technologies

## Developing a Packaging Graphic System

Factors to consider when designing an effective Global Packaging Graphic System



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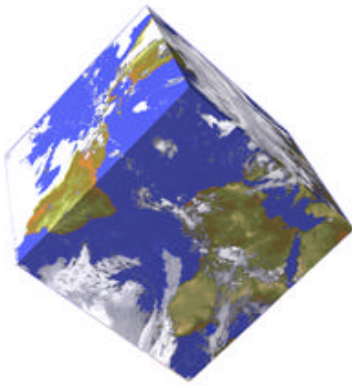
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## Introduction

### Executive Summary



This white paper documents the key issues that must be addressed prior to and during the development of a Packaging Graphic System. A well-designed Packaging Graphic System will ensure successful global packaging implementation and make it possible to streamline your packaging process through automation.

#### Successful Packaging Implementation

Unfortunately, many corporations will find out too late that their new packaging design will not work for all of their global packaging needs. This is primarily due to the fact that the designer who worked on the new packaging design did not take in to account all of the global requirements of the corporation's packaging.

The issues that this report raises will help you and your teams meet these many requirements early in your process. By encountering and dealing with these issues proactively, you will save your company a great deal of time and money over the traditional reactive method of dealing with global packaging issues. By designing your Packaging Graphic System according to the rules that we have set forth you will ensure success for your company in your global packaging implementation.

#### Packaging Automation

In addition to a much more successful and efficient packaging implementation process, a properly designed Packaging Graphic System will make it possible to streamline your packaging process through automation software. This software program – known as a “wizard” – would enable users of the software to quickly and easily generate accurate and on-brand packaging graphics files. A well-designed packaging graphics design system will lend itself to being automated into software.

The computer program envisioned would enable an individual, familiar with a company's brand design and its

implementation in developing packaging graphics files, to instruct the system to automatically build a graphics file in Adobe Illustrator® or InDesign® format. The graphics file would be built according to the company's packaging guidelines and would contain all the requisite design elements in the correct configurations and locations.

This study draws on our experiences from among other projects, the development of Hewlett Packard's Digital Packaging and Workflow (DPAW) Packaging Tools software. During that project, the HP DPAW team and BrandWizard Technologies advised on and executed a redesign of HP's Idea Unit based design system. One of the results of the project was the Packaging Wizard. This tool enables a user to produce accurate package build files for various product lines in various layout styles, both with and without die lines, in a fraction of the time it would take to draw them manually.

## Overview of a Packaging Graphic System



Although coming to grips with all of the variables involved in your packaging can be a complex task, we have found that the following hierarchy will simplify your efforts. We recommend completing a packaging "family tree" based on this hierarchy at the commencement of the designing your Packaging Graphic System.

[Please see the appendix for a graphical depiction of this concept.]

Design Look

*Every company has one or more design looks.*



A company like Procter & Gamble will have a unique design look for each of its major brands. Some companies will have one corporate design look across all of their packaging like General Motors does. Please see the examples to the left.

Package Type

Every design look has one or more package types. Package types can include cartons, labels, blisters, bags, clamshells and other different structures. A package type will be defined by a combination of a package die line and the

material that is used to create the package. By the die line we mean all the specifications needed to draw the exact outline of the finished package in the actual dimensions. The die line may also include slots for hand-holds and localization, as well as glue flaps and other non-design parts of the package. The die line will also incorporate the thickness of the material in the calculation and drawing of each panel. Oftentimes, the packaging material will dictate the printing technique used to produce graphics on the package type because only certain types of printers are able to print on certain types of materials, and because high-resolution graphics require higher quality material for printing in order to be legible.



## Layout

*Every package type has one or more layouts.*

Layouts take into account the sizing and positioning of the elements on different panels of the package. (See below.)



### Element

*Every layout has one or more elements and an element is the basic building block of a Packaging Graphic System.*

Elements are design related entities like brand marks, images and graphic symbols or purely informational entities like product copy, or non-design elements such as SKU numbers and bar codes.



## Details of a Packaging Graphic System

### Applying a new Design Look to Packaging

A design look must be based on a set of logical rules that govern its application across multiple product packages. Some design rules apply very well to a subset of a company's product line, but do not extend well when applied to product lines that may not have been studied during the design process. Some products may require the use of different types of packaging or different types of printing technology that were not studied. As such, if the system is not built with a flexible and extensible framework, it may break down when applied further a field. One way to avoid this scenario is to study a wide variety of products before designing the system. Another way would be to design the system with a flexible master template that could be interpreted in multiple ways. Several off-shoots that are product-specific, region-specific and package type templates could be developed based on the master template.

*Oftentimes, we find that a given design logic applies very elegantly to print but does not translate well to packaging, but if it does, it may not apply well to all product lines equally.*

Prior to developing any Packaging Graphic System, one must have a clear understanding of the design logic behind the brand. Focusing on the application of the brand design logic to packaging one must understand how it is to be applied to the various product lines and the various geographic regions that the products are sold in.

*Furthermore, even if the design rules can scale well to different product shapes and sizes it may not work well in different regions of the world.*

Thus, it is not only imperative to understand the logic but to be able to apply it across multiple scenarios and real world situations.

In our experience we have come across four major types of design rule methodologies:

1. Grid-based: where the design surface or panel is divided up by parallel lines into smaller units
2. Percent-of-panel based: where design elements are distributed on a panel after a certain percentage of the panel has been allotted to one or more primary art elements
3. Relative-to-art-object: where the size and position of different art elements are determined in relation to each other
4. Hybrid: which can be based on more than one of the above mentioned design systems, which is generally what we find in practice

[Please see the appendix for more details on the three main design methodologies.]

The hybrid design system appears to be most prevalent since most designers choose to employ more than one basic foundation for building their designs upon. For example, the existing HP Idea Unit based system employed a base grid in combination with the relative-to-art-object methodology.

Our study of the Idea Unit based design revealed problems in the system logic when it was applied to packages of what appeared to be unplanned for sizes. It is imperative that the logic be extensible and not restrictive in the interpretation of the design, or that it only address a small subset of what it needs to. For example, it must be clear within the logic what would happen if the shape of the package that the design is applied to becomes extremely horizontal or extremely vertical. The design logic must not only be applicable to straight forward three-dimensional objects such as cubes and cuboids, also called rectangular boxes, but also bevels, wraps and clamshell package types.

The difficulty of creating such universally applicable brand design logic is quite overwhelming. Therefore, many firms choose to break it down in to separate components with separate templates for each but a common thread through out all of them. Once the problem is understood in its entirety, it can be broken down in to manageable pieces, which can then be implemented in a proper Packaging Graphic System.

## Package Types

### Introduction



*A well developed Packaging Graphic System will handle various package types, accounting for package visibility, package material and package shape.*

We are using packaging type as a broad term that includes the above three distinct concepts as well as all the sub-categories of each.

When looking at issues of applying a design look to various package types we have to contend with visual challenges and print technology challenges. Visual challenges stem from the fact that different materials used in packages, e.g., Kraft or white cardboard are capable of displaying different types of imagery. Kraft is generally used for non-consumer facing, or "low visibility" products. Generally, the intended audience does not require rich imagery the way that more typical consumer products do. Nonetheless, this issue must be borne in mind too. In terms of printing technology challenges, if rich imagery is required on a Kraft package, the print may lose quality when photography or subtle colors are displayed.



With regard to the concept of package "visibility" we have encountered three sub-categories, as follows:

1. High-visibility: consumer
2. Low-visibility: commercial
3. Direct-ship: shipping of either consumer or commercial products

Some of the common packaging materials that are used by HP are as follows:

1. Natural Kraft Corrugated Cardboard (heavy-weight cardboard material)
2. Printed Corrugated Cases (heavy-weight cardboard with white surface)
3. Paperboard (lighter white cardboard)

4. Plastic (not discussed in detail)

With regard to package shapes we have encountered the following:

1. Regular box or carton (e.g., regular slotted carton)
2. Five-sided box (a bottom-less box on a pallet or half slotted carton)
3. Wrap (four-sided box)
4. Beveled box (irregular-shaped six-sided box with or without hang-tab)
5. L-board (two-panel board for media)
6. "Boxelope" (six-sided box that opens like an envelope)
7. Envelope (multiple configurations)
8. Clamshell (may simply be a cardboard panel with print on both sides)
9. Blister pack (not discussed)

[Please note that there may be other types not listed here.]

In our experience, we have seen two primary types of packaging material and visibility relationships:

1. White cardboard is used for both high-visibility as well as low-visibility packaging.
2. Kraft packaging is used for both low-visibility and direct-ship products.

Simply considering the visibility or package shape is not enough. Packaging material must also be considered as the die line and printing process may change. It must also be understood whether or not package types correspond to certain package materials. For example,

1. "Do all regions and product lines have the same package material categorizations and requirements?", and in a related manner,

2. "Do Commercial and Consumer products have different package material requirements?"

If there are such relationships that are well established, then it would be important to understand them and codify them in the Packaging Graphic System appropriately. Some package shapes may also be region-specific – as such, those rules would also need to be studied and implemented in the design system. Two questions that need to be asked are:

1. "Is Kraft always used for HSC packages?"
2. "Are all clamshell and blister packages printed on white cardboard?"

### Package Die Line Integration

*A good design system must be able to accommodate non-design elements as well as the inclusion of a die line without compromising the integrity of the package layout.*

Combining the die line with the design system includes incorporating the correct panel orientation and layout in addition to displaying glue flaps, other blank flaps, crop marks, package material thickness, bar codes, etc., by product line. The problem arises when the complexity of the die line is superimposed on the design system grid, whilst preserving the integrity of each. It must be clear how the Packaging Graphic System and its grid adapt to various die lines. Many design systems do not adequately account for flaps that contain non-design elements such as unpacking diagrams, warning symbols, localization slots, sticker locations, hand-holds etc. These elements affect the visual impact of any package yet are generally taken in to consideration only once the die line is present.

A good design system must be able to clearly answer the following questions:

1. How do hand-holds and flaps affect other package design elements?
2. How does the choice of package material affect the hand-holds and flaps?

3. How does the package shape affect the placement of hand-holds and flaps?
4. How does the aspect ratio of the relevant panels affect the location of hand-holds and flaps?

By this overview it is clear that when developing a package layout file one must consider the type of package that will be used for the product. Each package type will require a different design file layout and die line, depending upon the number of panels, their orientation and purpose.

### Inserts

Many technical products, such as those developed by HP, tend to have instruction manuals and other printed material that must accompany the actual packaged product. Thus, the packages of many of these products contain localization slots that allow the inclusion of the requisite inserts to accompany the product within the package. Some companies, especially pharmaceutical, include the design and development of the inserts along with the packaging. Therefore, these inserts must also follow the company's design system guidelines. [As such, for completeness we have included Inserts as part of this section, even though it is not a true "package type".]

## Layouts

By layouts, we mean the different manners in which the art work depicting a particular package can be displayed. For example, some products may best be suited to being displayed in a landscape mode diagram whereas other may best be shown in portrait mode. Most products that are more flat than tall in nature are generally depicted diagrammatically in landscape mode. However, even within this layout orientation, some products are shown with the primary identification panel leftmost in the layout and others with that panel as the third from the left. In our experience most camera layouts have been drawn in portrait mode because the specifications (or back) panel is shown stacked on top of the primary product identification (or front) panel.

## Regional Considerations

*Regional subtleties as well as legal requirements can impact the implementation of any design layout and thus the development of any Packaging Graphic System.*

We have observed the following issues when studying the HP packaging system implementation across multiple regions (in no particular order):

1. Placement of certain shipping icons in specific locations on certain panels for all packages shipped to a single country, (e.g., China)
2. Different design elements on packages for different regions, e.g., European media sizes (A3, A4, etc.) requiring different elements than those for the US (8.5 x 11, 11 x 17, etc.)
3. Multiple die lines for the very same product depending upon the printer being used to print the packages, leading to the use of multiple layout files (e.g., ink cartridge in Europe)
4. Use of different number of images on packages of the same product based on the region, e.g., Latin America
5. Different space requirements for text depending upon the number of languages on the package
6. Different treatment of text elements by region, such as left justifying certain text elements that are required to be centered according to the guidelines (e.g., Media in Europe). See illustration to the left.
7. Additional communications placeholders, such as messaging text, specifications and legal copy, for some regions, such as South America, as an exception to the messaging text rules
8. Specific text requirements by country, where some countries such as Canada require certain languages to be displayed at the same point size as the default (English) text, e.g., for product descriptor text



inkjet



inkjet

9. Some regions, e.g., South America, treat blank space on packaging differently from other regions and in some cases are treated outside the guidelines



10. At times certain colors are used to designate specific technology, such as the use of colors to identify the different types of ink cartridge technology. Care must be taken not to use a color to identify a technology such as ink that closely resembles the color of the product, i.e., the ink itself. [As shown in the diagram.] This has also been done with certain media products.

11. The use of color also seems to vary by region, where some regions avoid the use of certain colors that may be seen culturally inappropriate even though those colors may have been required by the guidelines

12. The “Value Proposition” text seems to be implemented differently and inconsistently both by region and at times by product line

*Based on these observations, we would recommend that regional issues be taken in to consideration early in the Packaging Graphic System design process.*

Additionally, rules should be defined for how the system may be stretched to accommodate unforeseen regional requirements. Finally, rules need to be set that allow for exceptions. There should be a mechanism to implement systematic as well as manual exceptions.

### Panel Locations

As discussed in the section on Package Types, it is clear that panel location in the layout file will be affected by the type of package being designed. With this in mind, we would recommend that:

*Panels should be identified not by their “location” in a standard layout but by their purpose.*

The following diagram refers to each panel by location in the layout that is shown below. The main drawback with this naming is that not all product layout files are shown in this manner. For example, some product layout files display the “front” panel as the left-most or first panel, then the “left”

followed by the “back” and then the “right” panel last. The problem gets more complicated when the back panel is shown upside down immediately above the “top” panel and the “bottom” panel further on top of the “back” panel. Clearly, this type of naming is not ideal.



The order or the purpose of a panel in the layout is independent of the naming convention. For example in the following diagram, the panels are named:

1. Features Panel
2. Primary Product Identification Panel
3. Specifications Panel
4. Messaging Panel
5. Secondary Product Identification Panel (top half of Top Panel)
6. Flexible Panel or Secondary Messaging Panel (bottom half of Top Panel)



[Notice that the bottom panel is not shown in either diagram as it is assumed that there would be no regular brand elements on that panel. However, it is quite possible, in fact probable, that the bottom panels would contain non-brand elements such as bar codes, shipping icons and other regulatory icons, etc. and thus should be shown for completeness.]

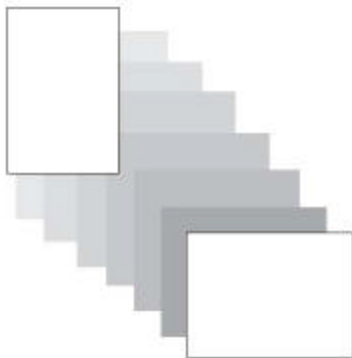
Another situation where making panel names and location independent of each other becomes important is when determining which panels to place hand-holds and localization slots. If a rule is made that the “front” panel is defined to be the widest vertical panel, which may be universally true for consumer packages, it links the panel name to panel size. We found that this linkage was not true for commercial packages, where the function served by the “front” panel, that of being the primary product identification, was not necessarily the widest panel. It is important to know which panel is being referred to especially since hand-holds could be placed on either the wider or the narrower vertical panels depending upon the package weight distribution and engineering study. It is essential that panels be named independent of location and that rules are not made specific to panel size or panel location in an arbitrary layout file, in other words, “one size does not fit all,” as shown below.



The packaging graphic design must be specific to each different package type allowing graphic artists to build the appropriate layouts correctly regardless of panel location and size. In order to do so, the design system must abstract function, location and identify panel by purpose. Resulting layouts produced by graphic artists are more likely to be on brand both by product line and by package type.

#### Panel Aspect Ratios

*In order to determine the lower and upper limits of the how the grid and the Packaging Graphic System adapt to changes in panel size one must understand the relationships of aspect ratio to the system.*



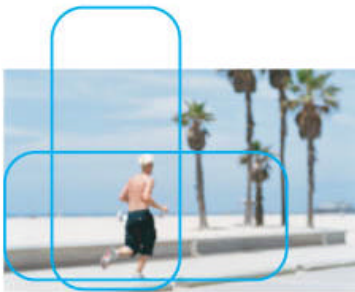
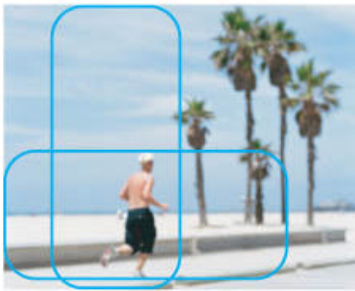
For example, one must know what happens to the standard grid and design if two or all four of the main horizontal panels were extremely oblong yielding a very flat or “pizza-box” shape? Similarly, it is important to know what happens if the box is very tall, very deep, very small or very large. As such, in order to design a system well, not only is it imperative to know the minimum and maximum lengths for each dimension of a panel, but also the allowable minimum and maximum aspect ratios of each panel.

For instance, the theoretical maximum width may be 50 inches, and the minimum height may be 5 inches, giving an aspect ratio (width/height) of 10. Yet the design system may only be able to address a grid system with a maximum aspect ratio of 8. In this example, either the maximum width must not be greater than 40 inches or the minimum height cannot be less than 6.25 inches.

Additionally, panel aspect ratios may impact not only the grid but also the number, layout, size and aspect ratio of the

elements that appear on the panel. One asset type that is particularly sensitive to aspect ratio changes is imagery, whether illustrations or photography.

*With this in mind it may be necessary to develop imagery in more than one aspect ratio in order to appear visually appealing on the final package.*



There may need to be both tall and wide photographs of products in order to better match the layout of the package. See the two photographs to the left as an illustration of this concept. The top picture is in 4:3 aspect ratio whereas the bottom one is in 16:9 aspect ratio. The former may need to be cropped if a tall picture is needed whereas the latter may only need to be scaled if a wide picture is needed.

Clearly, any design system that can eventually be systematized must abstract the design as well as possible from the constraints of the default panel aspect ratio. It must be able to “stretch” and “shrink” and still be visually appealing in all allowable cases.

### Treatment of Design Elements

We must understand the primary, secondary and tertiary aspects of the Packaging Graphic System that determine the appropriate usage of elements. It must be clear if elements are placed relative to the grid or relative to each other, and it must be clear what the rules are that govern either scenario.

Generally, the grid may be described by a fixed or variable number of rows and columns. Furthermore, the grid structure can be dependent upon the size of the field upon which it is laid. For instance, if a grid were to be placed on a sheet of plain paper, the number of rows and columns in the grid may change depending upon whether an 8.5 x 11 inch or 11 x 17 inch sheet were used. Additionally, the grid may change if the page were viewed in portrait or landscape mode. For this exercise, the sheet of paper can serve as a proxy for the panel of a package.

The grid system may have additional attributes such as margins that must be placed between the edges of the sheet and the grid within it. There may also be gutters between each rectangular unit of the grid. The rectangular units may

also have rounded corners instead of right angles. All three of these attributes were present in the Idea Unit based design system used by HP. The DPAW Packaging Wizard that was developed abstracted all these attributes such that any values could be given to each – margin, gutter, and corner radius – independently and adjusted as desired. This gave the team immense flexibility in implementing the design guidelines accurately regardless of sheet aspect ratio.

## Elements

### Introduction

The next granular level of the Packaging Graphic System is an entity that we refer to as the element. Specifically, one must understand both the purpose and hierarchy of all such entities, which we divide in to two classes: design elements and non-design elements. By design elements we mean:

1. Grids, including margins and gutters (space between adjacent idea units that is similar to margins)
2. Illustrations, product and messaging photography
3. Signature, icons, and other logos
4. Color palette including art objects (color blocks)
5. Typography (font types, font sizes, kerning and leading for text blocks)
6. Violators
7. Other brand specific elements, such as brand marks

Additionally, there are other entities that are not actual design elements but are often placed on packages, that we call non-design elements. These entities must also be placed according to some specific guidelines. By non-design elements we mean:

1. Bar codes
2. Diagrams, such as for unpacking
3. Hash marks, such as for labels, stickers, etc.

4. Perforation marks, such as for hand-holds and localization slots

### Design Elements

Most elements have different purposes, such as informational, sales communication, marketing, product performance, regulatory requirements, stylistic considerations or brand consistency. Understanding the precise purpose of each element individually and relative to other elements enables the designer to set up the proper relationship of these elements in the Packaging Graphic System. The purpose also helps understand the hierarchy as discussed next.

Understanding the hierarchy of how to treat design elements is important because it enables graphic artists to prioritize the location and sizes of elements relative to each other. For example, there may be a rule requiring that the HP signature always be four-times the size of any other company logo on the same panel. However, vendors may want or require their logos to be as large as possible, which may cause the two rules to conflict. Another rule may be that some icons must always be located in the top left corner of each horizontal panel on a box. Some rules may conflict with each other and thus a clear hierarchy is very important in order to build a coherent system.

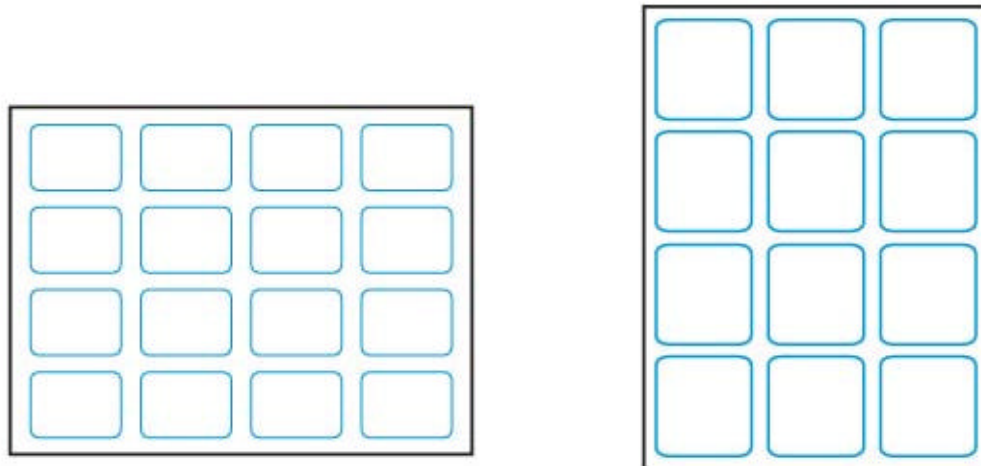


The rules that govern a brand design system must be understandable to those that would implement the system in developing packaging.

*Oftentimes, Packaging Graphics System rules apply well to two-dimensional objects such as panels and sheets of paper, but do not translate well in to three-dimensional objects such as complete packages.*



As an example, for the Idea Unit based design, the rules for calculating rounded corners and gutters were based on a single portrait shaped sheet of paper. When the paper was viewed in landscape mode, the defined rule would yield different sized gutters and rounded corners. See graphic example below.



This is clearly less than ideal since the panel grid should appear the same visually regardless of the page orientation. Furthermore, two boxes of the same cubic volume but different dimensions would have a different grid based on the panels used to calculate the grid. Our team reinterpreted the rule to include the third dimension of the package thus abstracting both from being dependent on a single panel or the aspect ratio of the panel chosen. This method guaranteed more consistent grid structure across package sizes.

The Idea Unit formula also allowed for a range of values to be used, e.g., 5% - 10% for calculating gutters, based on the need for more or less white space on the package. However, this range allows a wide spectrum in interpretation, even within the same product line since it wasn't clear when the lower or upper value is to be used, or why there even was such a wide range. Even though this rule provided flexibility in application it wasn't clear when each value was to be applied.



Occasionally, design systems allow for special cases in terms of product packaging layout and design. The prior system's "Star Technology" and "Violator" design logic were two examples of this scenario. Star Technology design was an embellishment of the regular product design system, such that certain products that contained what HP considered to be innovative technology solutions, could be highlighted over and above regular products. Any such design exceptions should also be carefully thought through so that they may be applied logically and accurately to different product lines.



With regard to Violators (see example to the left) – even though it is a true design element – it is explicitly allowed to break the rules for design elements. If such elements are to be employed in a design system then care must be taken when defining the rules and formulas governing the implementation of such elements. For example, in the prior design system the surface area of the panel on which the violator was to be placed was used to calculate the size of the allowable violator. However, it should be clear that any such formula that did not take the volume of the package in to account would produce vastly different sized violators for different packages occupying the same volume. This should be unacceptable.

### Non-design Elements

One must be precise when addressing the location and types of elements and the selection of the correct brand element. For example, if the bar code specification is not clear, the wrong bar code font may be used. The UPC bar code comes in versions A and C, and within each version, there are various specifications for size, color and whether or not human-readable characters are displayed. These must be explicitly specified.

Bar codes, along with sticker and label hash marks, unpacking and warning diagrams, are part of class of elements that aren't specific to the brand design but must be placed on the packaging nonetheless.

*Therefore, guidelines surrounding all the non-design elements must also be clearly specified.*



Bar codes may appear on both visible and hidden flaps. However, unpacking and warning diagrams generally are placed on hidden flaps only. These flaps tend to be directly underneath the top flaps that are visible. Many design systems do not address these flaps at all.

A well designed Packaging Graphic System should be logical, consistent and understandable. In order for the system to be applicable across multiple, even unforeseen scenarios it must also be flexible and extensible.

## Summary

In conclusion, we'd like to reemphasize the following key concepts:

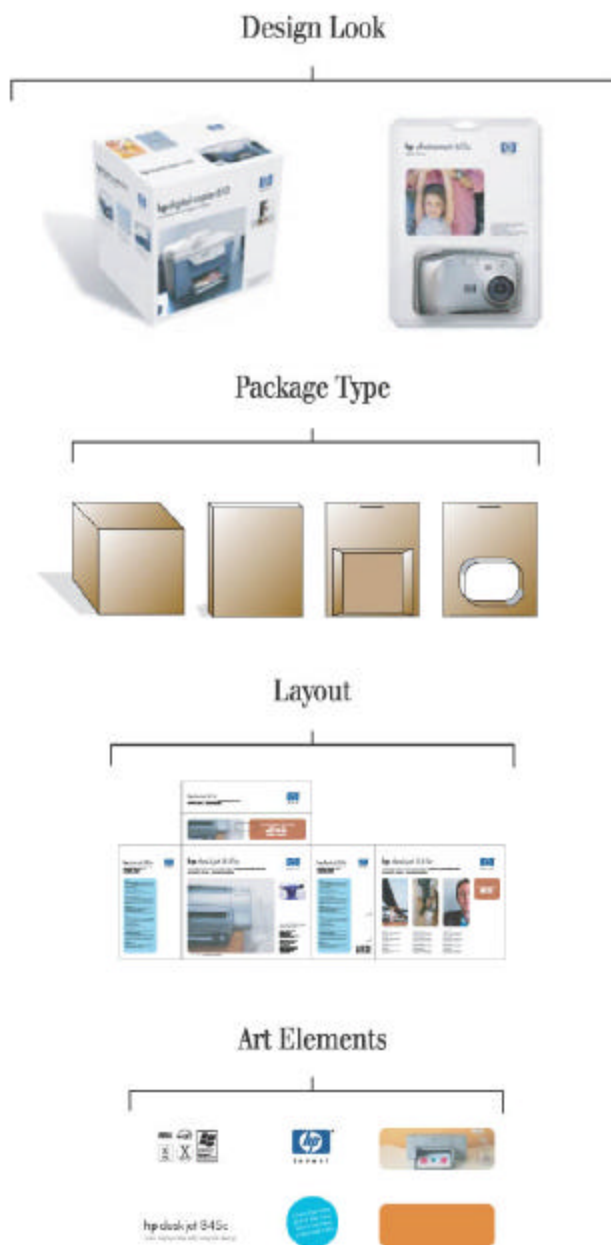
1. it is imperative to keep in mind that any good Packaging Graphic System must be developed with three dimensions in mind and not merely be an adaptation of two-dimensional design systems
2. the system must be applicable to a myriad of packaging shapes, sizes and materials
3. the system must contain design styles for different "visibility" requirements as well as for different printing technologies
4. the nomenclature employed must be clear, logical and very specific, especially when describing the specific attributes of both design and non-design elements
5. regional considerations such as multiple languages, legal requirements, and cultural sensitivities, should be addressed early in the process of developing the system and should not be an afterthought
6. the system should be able to accommodate the inclusion of an accurate die line, including the insertion of hand-holds etc., without compromising the design elegance

With these important concepts in mind, we believe that one can develop an effective Packaging Graphic System both from an application perspective and from a cost perspective.

## Appendix

### Overview of a Packaging Graphic System

The following diagram illustrates the hierarchy of the four levels of a Packaging Graphic System.

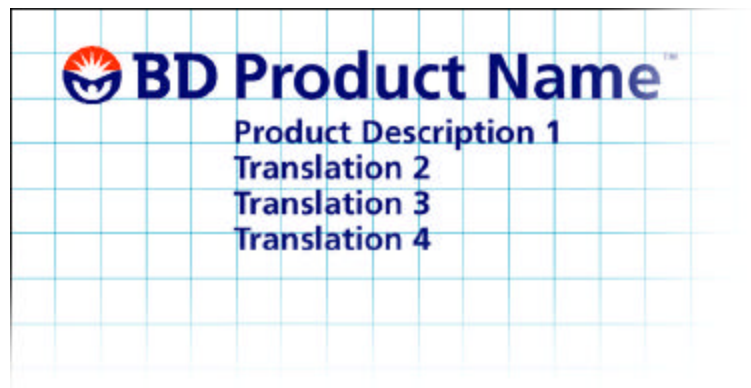


# Design Methodologies

## Grid-based



In such a system the design surface or panel is divided up by parallel lines into smaller units which are then used for sizing and positioning of the art elements, as shown in the two examples from HP and Becton Dickinson (BD).

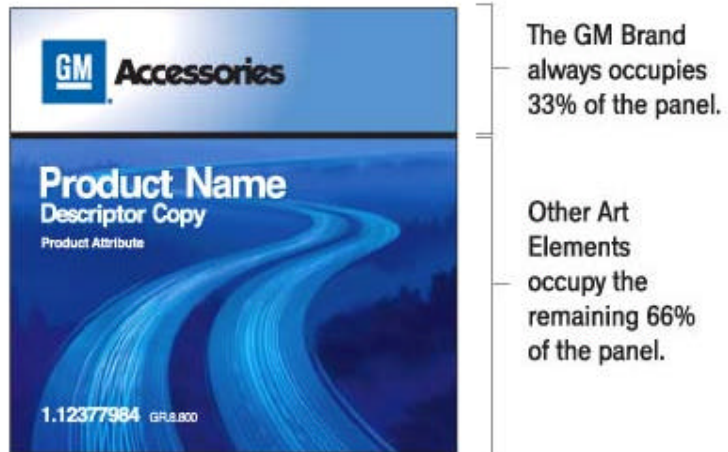


## Percent-of-Panel



Color band is always 10–15% of the panel

Design elements are distributed on a panel after a certain percentage of the panel has been allotted to some primary art element, such as a color band or masthead. The BD and General Motors examples illustrate this concept well.



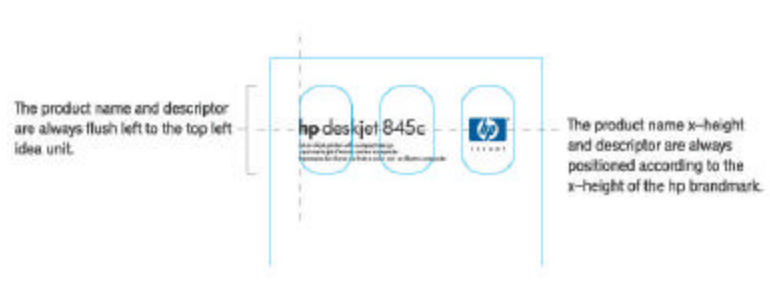
### Relative-to-Art-Object



In this system the size and position of different art elements are determined in relation to each other. Both HP and the Aventis Pharmaceuticals use this rule scheme to size and place many design elements.



### Hybrid



This is the Packaging Graphic System that we tend to see most often in practice. It is a popular system because it allows the flexibility to use various rules that are appropriate to different types of elements while allowing the creativity to design elegant panels. The two examples shown illustrate these dual benefits.

