



A·P·E CONSULTING

ANALYSIS · PLANNING · EXECUTION

CASE STUDY - MARKET RESEARCH

Market Research for a Clear View

Established in 2009, 5R Solutions specialises in window glass recovery in both Australia and New Zealand. 5R Solutions recycles thousands of tonnes of flat glass across New Zealand annually with recycling operations in Christchurch and Auckland, and a NZ-wide network of glass recovery centres.

Their philosophy is to Reduce, Reuse, Recycle, Recover as much of their raw product as is practical with as little residual waste going to landfill as possible.

5R Solutions also sources car windscreens for recycling, a by-product of which is the Polyvinyl Butyral (PVB) laminate. Currently the only option for the waste PVB is sending it to landfill causing an impact on the environment and expense, estimates is there may in excess of 1,000 tonnes of PVB and glass ending up in NZ landfill annually. New Australian glass processing operations only scales up the amount of PVB recovered by 5R Solutions.

To address the residual landfill cost for PVB, 5R Solutions wanted to investigate two possible business opportunities:

- 1) The potential for the sale of recovered waste PVB to third party reprocessors.
- 2) The potential for industries to develop in New Zealand to use highly processed PVB.

To investigate these two opportunities 5R Solutions engaged A.P.E Consulting to conduct market research with the objective being to provide 5R Solutions with sufficient qualified data to make an educated decision on the commercial viability of pursuing either opportunity. A.P.E Consulting's team for this project included a vastly experienced researcher with an in-depth knowledge of primary (quantitative and qualitative) and secondary research methods.

To understand the global market for recovered waste PVB, initial secondary research by A.P.E Consulting's research team provided an understanding of market size, requirements and price levels, then identified key global players for further research. A.P.E's team then worked with its network of global contacts, include N.Z.T.E in Europe, to conduct further primary research and depth interviews.



Alternative uses and possibilities for recovered waste PVB were also investigated.

In evaluating the opportunities for highly processed PVB, A.P.E Consulting's research team worked initially to gain an understanding of the local market and specific industries segments. Following initial desktop research depth interviews were conducted with end users, suppliers and industry stakeholders across New Zealand Australia.

Over the course of the 3 month project, regular progress updates were provided to 5R Solutions in order to maintain communication and address any issues or necessary validations as they arose.

Following the 3 month project the research findings delivered in a comprehensive report, revealed that in the case of highly processed PVB the New Zealand and Australian markets alone would not be commercially viable. This did not justify the investment in plant for reprocessing, enabling 5R Solutions to redirect the capital that would have been necessary.

In the case of the potential for selling recovered PVB waste, clear paths to market were identified through the work of A.P.E and NZTE. As a result of this work 5R Solutions has been introduced to a number of potential partners. 5R Solutions continues to progress discussions on possibilities for diverting this material from landfill and establishing new potential revenue streams.

5R Solutions Managing Director, Chris Grant, is happy with progress and values the clarity the research findings provided him:

"Ian and his team have been very helpful in presenting useful data / research information to assist us in making informed decisions of a pathway forward with our project. The report and follow up where exceptional and new connections / introductions have been made to global players"

5RSolutions