

X QUARTERLY BEVERAGE PACKAGING PRICING MONITOR, 2012

S0 Good morning/afternoon, my name is _____. I am calling from X which is an independent marketing research company, specialising in international beverage markets. This is not a sales call.

We are currently piloting a survey aimed at tracking dairy and soft drink packaging prices on an on-going quarterly basis and in this context I would like to ask you a few short questions about your current packaging use.

All information data collected from this survey will be kept confidential and used in aggregate to obtain a picture of the market as a whole and any information you provide will not be related to you or your company.

The questionnaire will only take about seven minutes of your time and in return for your help we will send you a copy of the survey results upon completion.

S3 Would it be possible to do the interview now?

- | | | |
|----|--------------------|----------------------------|
| 01 | Yes | (GO TO S5) |
| 02 | Yes, but later | (SCHEDULE CALLBACK) |
| 03 | No, not interested | (GO TO S4) |

S4 Is there someone else in your company who is primarily responsible for selecting packaging materials that your company uses that I could speak with?

- | | | |
|----|---------|------------------------|
| 01 | Yes | |
| 02 | No | (THANK AND END) |
| 99 | Refused | (THANK AND END) |

S5 Would receive a copy of the results?

- | | |
|----|-----|
| 01 | Yes |
| 02 | No |

- Q1. In which of the following areas of the dairy drink and soft drinks markets are you currently active? **READ OUT FROM LIST BELOW AND TICK ALL THAT APPLY**

Dairy Drinks	Tick	Soft Drinks	Tick
- White Milk	<input type="checkbox"/>	- Carbonated Soft Drinks	<input type="checkbox"/>
- Cream	<input type="checkbox"/>	- Juices & Nectars	<input type="checkbox"/>
- Condensed & Evaporated Milk	<input type="checkbox"/>	- Still Fruit Drinks	<input type="checkbox"/>
- Drinking Yoghurt	<input type="checkbox"/>	- Iced Tea & Coffee	<input type="checkbox"/>
- Flavoured Milk	<input type="checkbox"/>	- Sports Drinks	<input type="checkbox"/>
- Fermented Milk	<input type="checkbox"/>	- Energy Drinks	<input type="checkbox"/>
- Soy-based Drinks	<input type="checkbox"/>		

- Q2. Which of the following packaging types do you buy? **READ OUT FROM LIST BELOW AND TICK ALL THAT APPLY**

- Q3. For each type of packaging material you buy, what are the main sizes of bottles / cartons / cans that you buy? **READ OUT FROM LIST BELOW AND TICK ALL THAT APPLY**

- Q4. For each of the following packaging types that you currently use, what per cent changes have you seen in your packaging purchase prices a) over the last 3 months and b) over the last 12 months? **STATE % CHANGE IN PERIOD AS NEGATIVE OR POSITIVE**

Q2 Pack Type	Q2 Tick if buy	Q3 Pack Size (Metric)	Q3 Alt. Size (Fl. Oz)	Q3	Q4a Price change over the last 3 months (+/- %)	Q4b Price change over the last 12 months (+/- %)
Glass Bottles	<input type="checkbox"/>	200ml	9.5	<input type="checkbox"/>		
		500ml	16	<input type="checkbox"/>		
		750ml	20	<input type="checkbox"/>		
			64	<input type="checkbox"/>		
		Other (write in)		<input type="checkbox"/>		
Cartons for long life (ambient) products	<input type="checkbox"/>	250ml	8	<input type="checkbox"/>		
		500ml	16	<input type="checkbox"/>		
		1000ml	32	<input type="checkbox"/>		
		1500ml	64	<input type="checkbox"/>		
		Other (write in)		<input type="checkbox"/>		
Cartons for short life (fresh) products	<input type="checkbox"/>	250ml	8	<input type="checkbox"/>		
		500ml	16	<input type="checkbox"/>		
		1000ml	32	<input type="checkbox"/>		
		1500ml	64	<input type="checkbox"/>		
		Other (write in)		<input type="checkbox"/>		
Cans	<input type="checkbox"/>	330ml	12	<input type="checkbox"/>		
		Other (write in)		<input type="checkbox"/>		
PET Bottles	<input type="checkbox"/>	250ml	8	<input type="checkbox"/>		
		500ml	16	<input type="checkbox"/>		
		600ml	20	<input type="checkbox"/>		
		1000ml	32	<input type="checkbox"/>		
		1500ml	64	<input type="checkbox"/>		
		Other (write in)		<input type="checkbox"/>		
HDPE Bottles	<input type="checkbox"/>	250ml	8	<input type="checkbox"/>		
		500ml	16	<input type="checkbox"/>		
		1000ml	32	<input type="checkbox"/>		
		2000ml	64	<input type="checkbox"/>		
		Other (write in)		<input type="checkbox"/>		

Q5. What in your view have been the main underlying reasons for these changes in price?
PROBE THE DIFFERENCES IN PRICE CHANGES BETWEEN PACKAGING TYPES AND MATERIALS OVER THE PERIOD

Q6. If you exclude the cost of the closure, about how much do you currently pay for each of the following packaging types that you use?

Q7. About how much of each type and size do you order annually?
PLEASE MAKE SURE YOU RECORD THE CURRENCY AND THE UNITS IN WHICH YOU ARE RECORDING THE VOLUMES. e.g. IF THEY ANSWER IN MILLIONS, STATE THIS.

Pack Type	Pack Size (Metric)	Alt. Size (Fl. Oz)	Q6. Price per Unit or Pack (in Local Currency), excluding closure	Q7. Approximate Annual Order Quantity
Glass Bottles	200ml	9.5		
	500ml	16		
	750ml	20		
		64		
	Other (write in)			
Cartons for long life (ambient) products	250ml	8		
	500ml	16		
	1000ml	32		
	1500ml	64		
	Other (write in)			
Cartons for short life (fresh) products	250ml	8		
	500ml	16		
	1000ml	32		
	1500ml	64		
	Other (write in)			
Cans	330ml	12		
	Other (write in)			
PET Bottles	250ml	8		
	500ml	16		
	600ml	20		
	1000ml	32		
	1500ml	64		
	Other (write in)			
HDPE Bottles	250ml	8		
	500ml	16		
	1000ml	32		
	2000ml	64		
	Other (write in)			

- Q8. For each of the following packaging types that you currently use, what per cent changes do you expect to see in your packaging purchase prices a) over the next 3 months and b) over the next 12 months?

STATE % CHANGE IN PERIOD AS NEGATIVE OR POSITIVE

Pack Type	Pack Size (Metric)	Alt. Size (Fl. Oz)	Q8a Price change over the next <u>3 months</u> (+/- %)	Q8b Price change over the next <u>12 months</u> (+/- %)
Glass Bottles	200ml	9.5		
	500ml	16		
	750ml	20		
		64		
	Other (write in)			
Cartons for long life (ambient) products	250ml	8		
	500ml	16		
	1000ml	32		
	1500ml	64		
	Other (write in)			
Cartons for short life (fresh) products	250ml	8		
	500ml	16		
	1000ml	32		
	1500ml	64		
	Other (write in)			
Cans	330ml	12		
	Other (write in)			
PET Bottles	250ml	8		
	500ml	16		
	600ml	20		
	1000ml	32		
	1500ml	64		
	Other (write in)			
HDPE Bottles	250ml	8		
	500ml	16		
	1000ml	32		
	2000ml	64		
	Other (write in)			

- Q9. Why do you say that?
PROBE THE REASONING BEHIND THEIR PRICE EXPECTATIONS AND ANY DIFFERENCES IN EXPECTATIONS a) BETWEEN PACKAGING TYPES, MATERIALS, AND SIZES and b) TIMING (3 and 12 MONTHS)

Q10. What other important factors do you think might influence beverage packaging prices over the next 12 months?

CONCLUSION:

That is the end of the questionnaire. Thank you very much for sparing your time to help us with this survey.

As I said at the beginning, your comments will be kept confidential and none of the information will be attributed to you or your company in any way.

In order to send you a copy of the survey findings however, could I please just check your name, department and email address?

Name: _____

Position/Department: _____

Email: _____

FURTHER INFORMATION:

If respondent requires further information about this survey or X's packaging services in general, please ask them to contact.