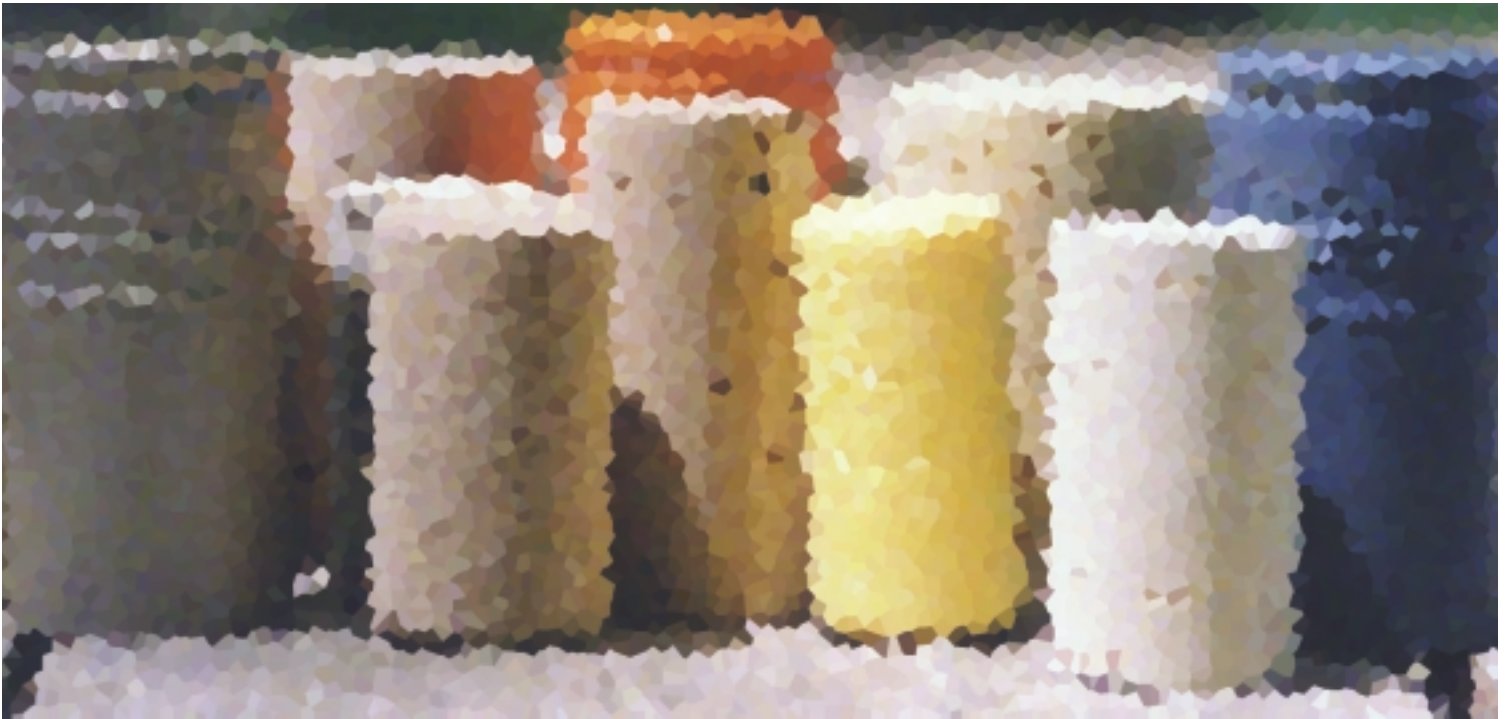


# **Wine Business 2004 Winemaker Closure Survey**

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# contents

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## **Analysis of Wine Business 2004 Closure Survey**

CLOSURE SATISFACTION MODEL

CLOSURE SATISFACTION BY SIZE OF WINERY

VENDOR SATISFACTION MODEL

## **2004 Winemaker Closure Survey Results**

as seen in the June 2004 edition of Wine Business Monthly

## **2004 Winemaker Closure Survey Questions**



Analysis of  
Wine Business 2004 Closure Survey

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## Contents

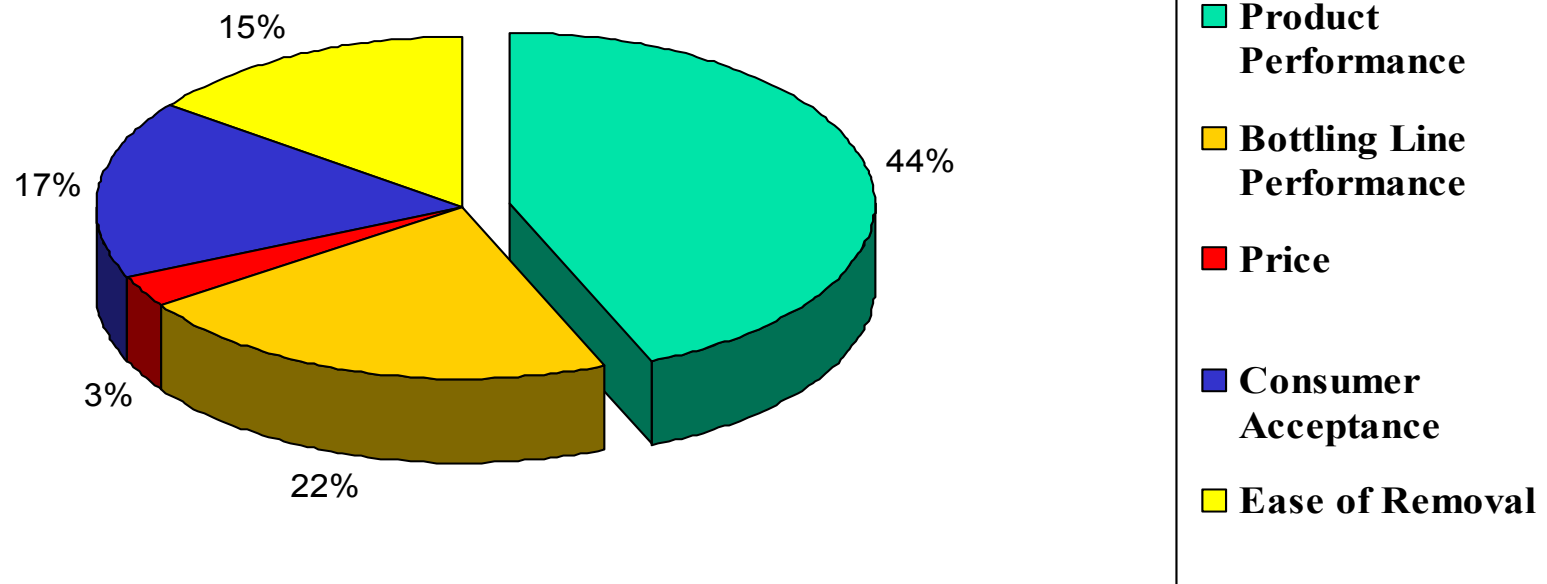
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- **Closure Satisfaction Model**
- Closure Satisfaction by Size of Winery
- **Vendor Satisfaction Model**

## When wineries choose which closure type to use (natural cork, technical cork, synthetic or screw cap)

- product performance is the most important factor
- price is the least important factor

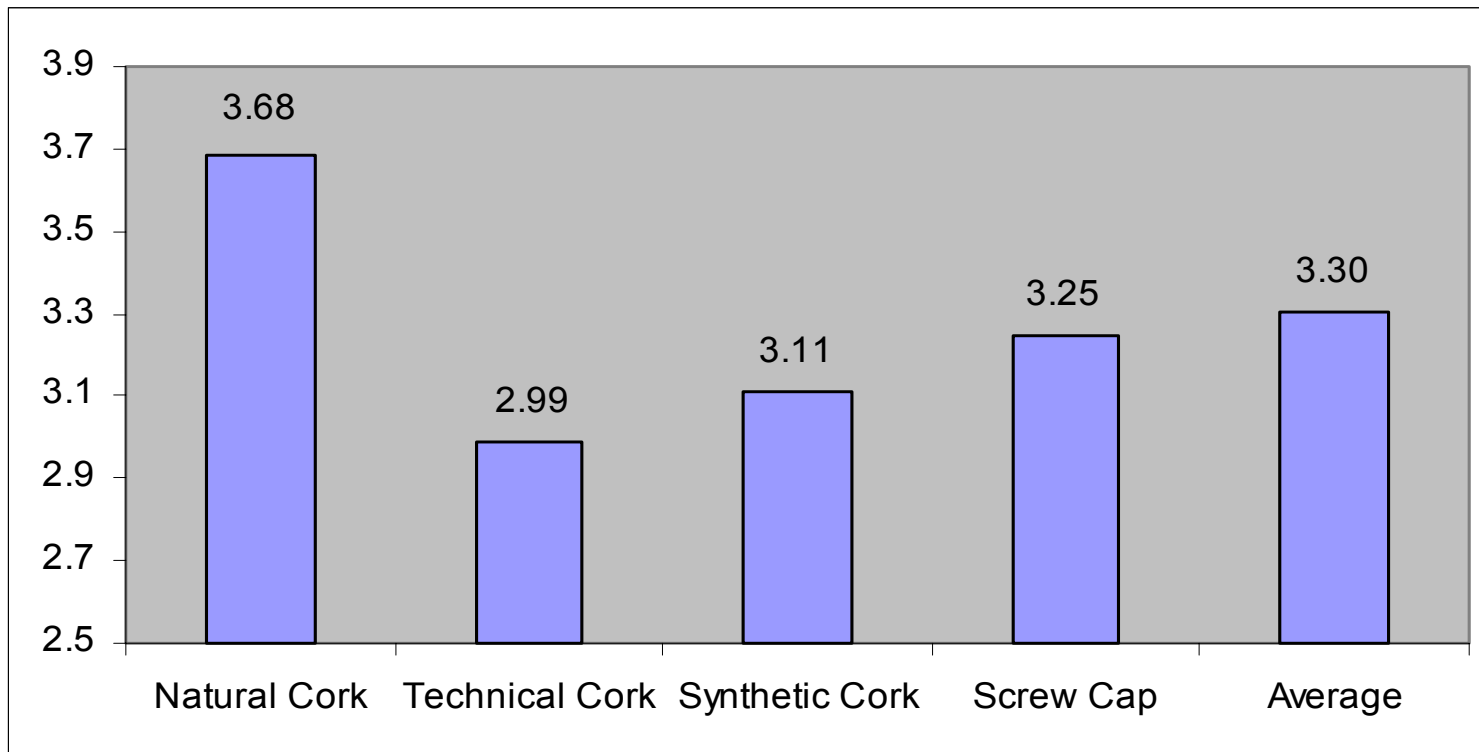
*% Contribution to Overall Satisfaction With Closure Type*





## Natural Cork Receives Highest Overall Rating

### Average Overall Ratings



## Each of The Closure Types Has Its Own Strengths and Weaknesses

	Overall	Price	Bottling Line Performance	Product Performance	Consumer	Ease of Removal
Importance		3%	22%	44%	17%	15%
Natural Cork	3.68	2.54	4.03	3.45	4.46	3.83
Technical Cork	2.99	3.30	3.43	2.91	3.41	3.07
Synthetic Cork	3.11	3.66	3.41	3.20	3.17	2.91
Screw Cap	3.25	3.50	3.04	3.57	2.62	4.16



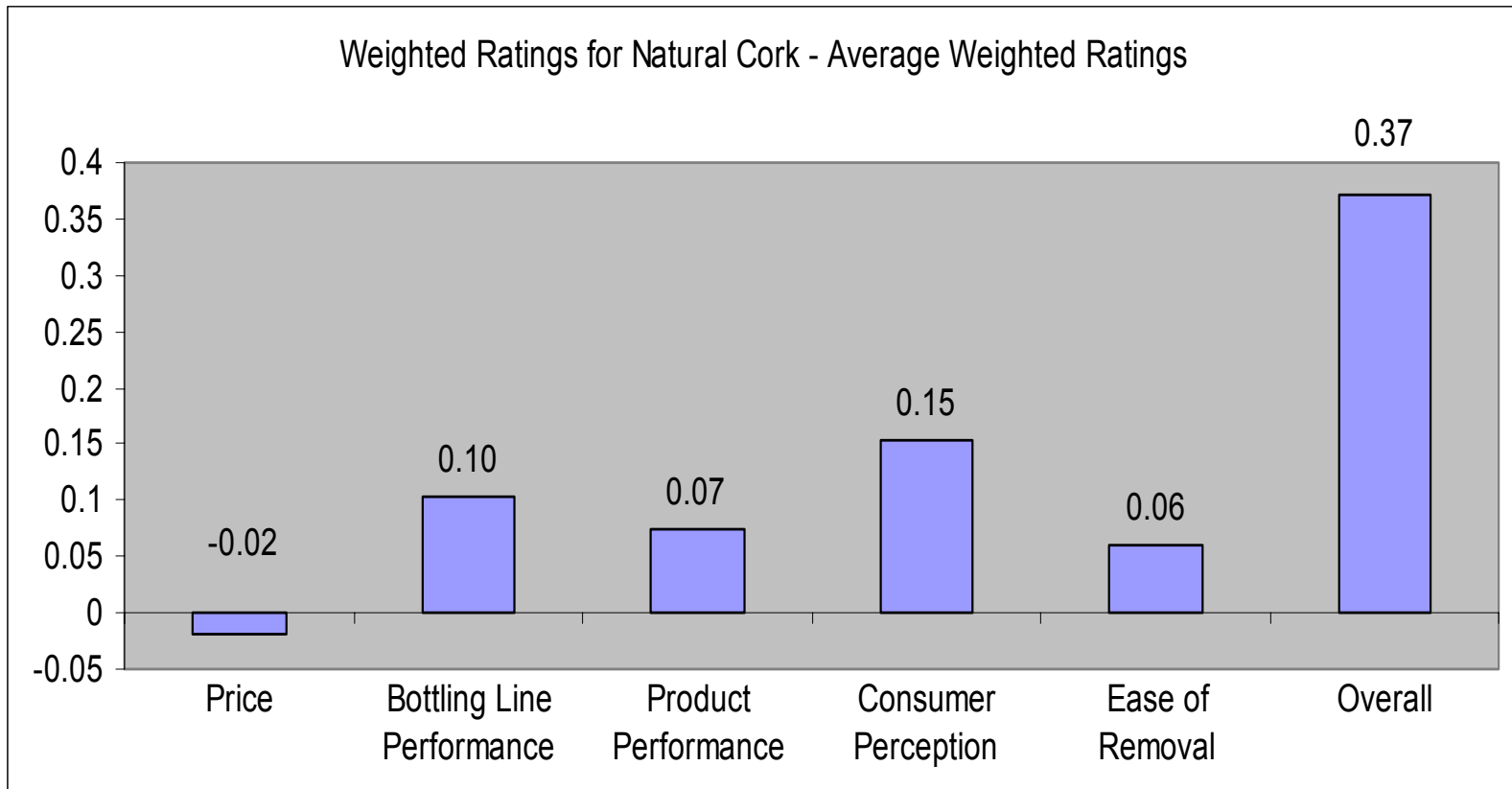
Highest Rating



Lowest Rating

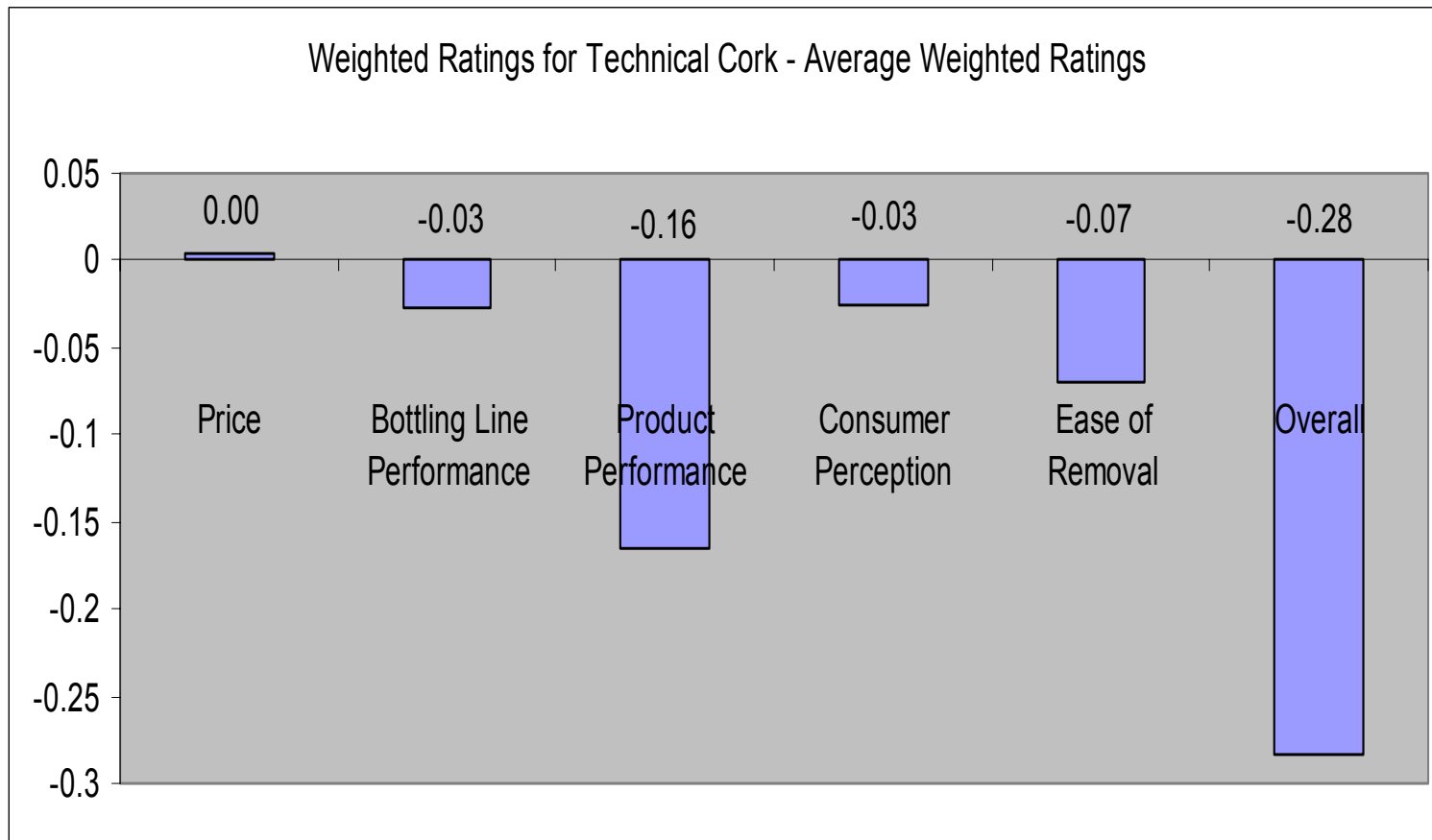


## Natural Cork Scored Above Average In All Categories But Price, Especially Consumer Perception



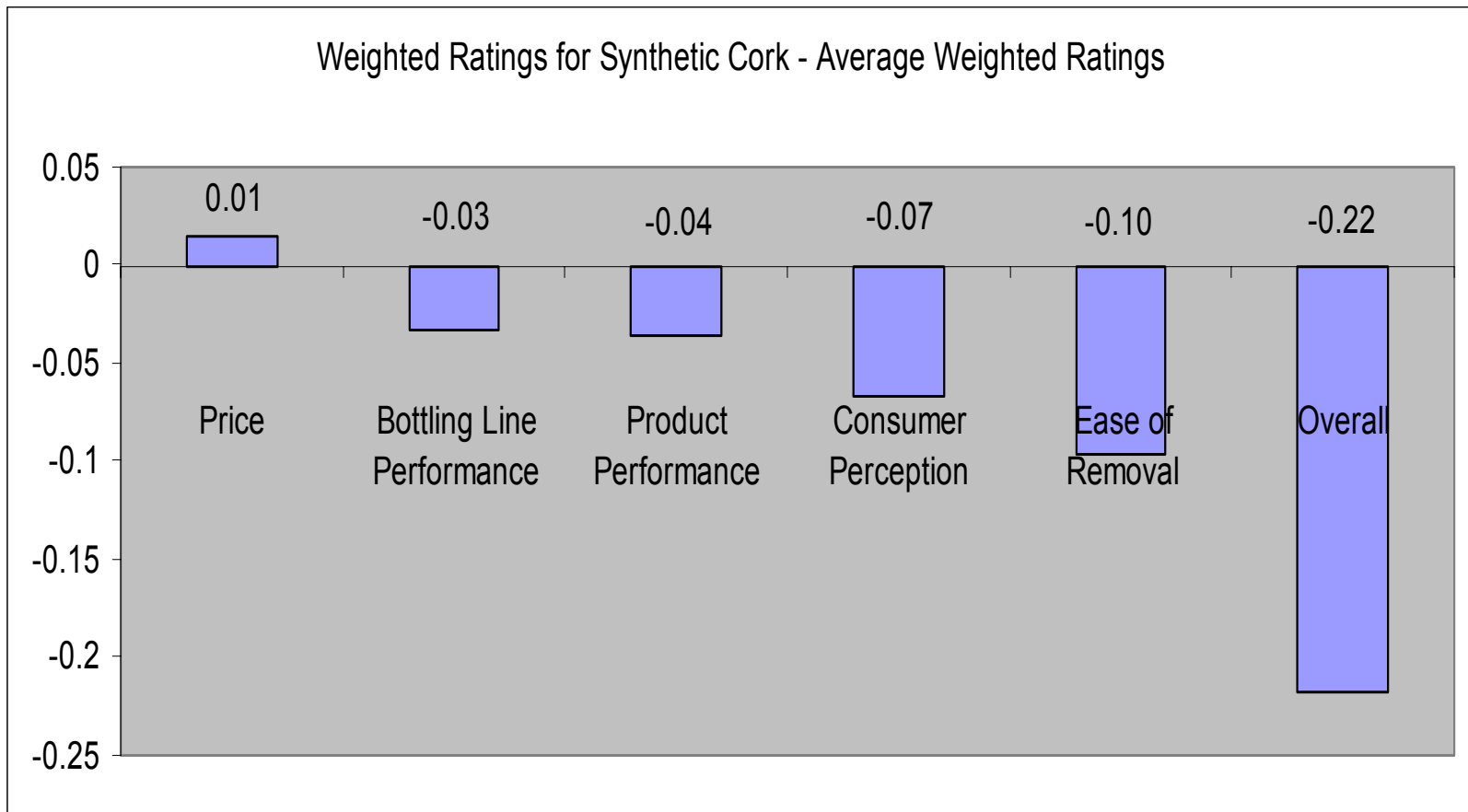
\*Weighted using coefficients from regression

## Technical Cork Below Average In All But Price, Especially Product Performance



\*Weighted using coefficients from regression

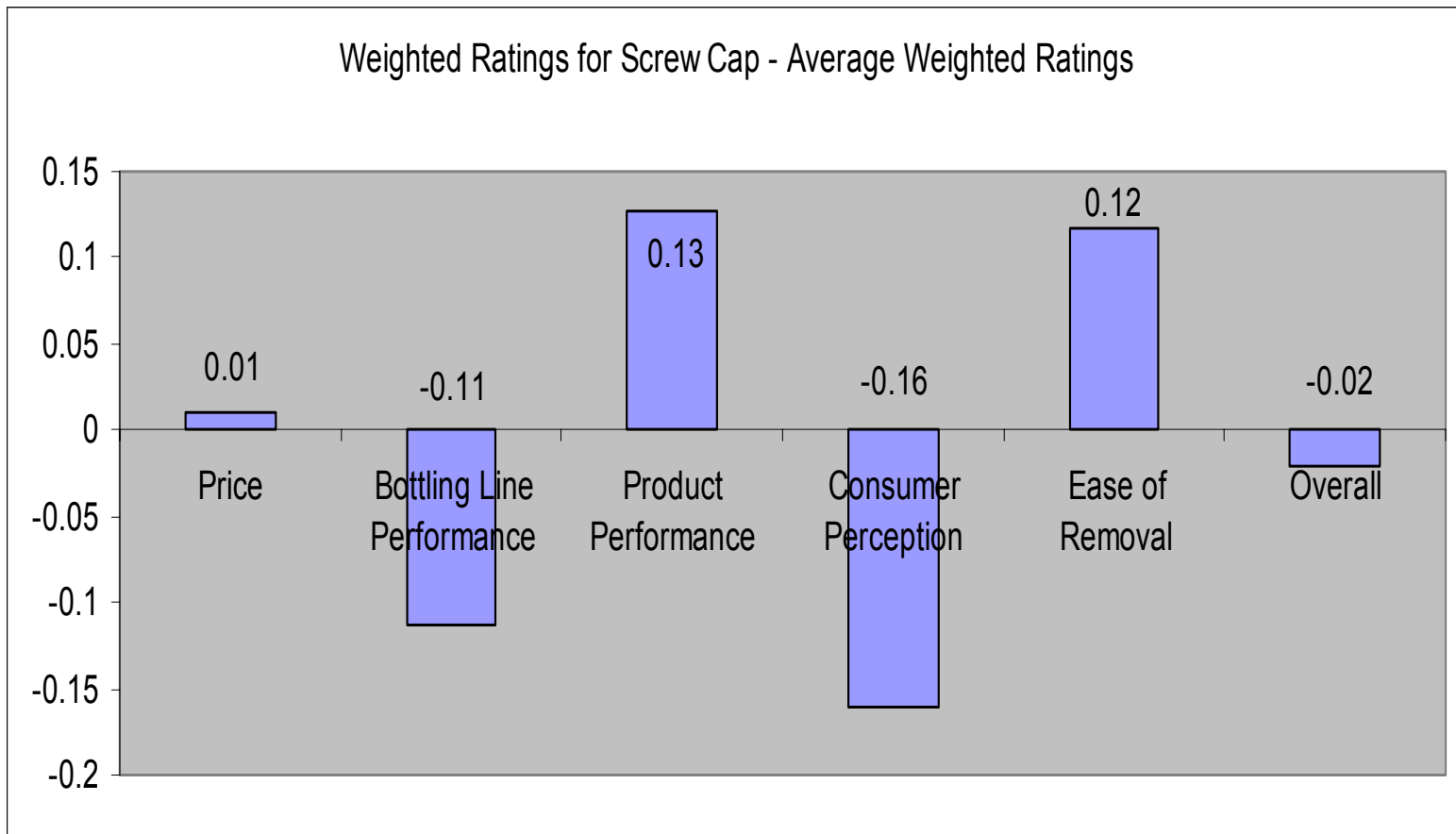
## Synthetic Cork Loses Points In Ease of Removal and Consumer Perception



\*Weighted using coefficients from regression



## Screw Cap Great in Product Performance and Ease of Removal, But Bottling Line and Consumer Perception Hurt Overall Rating



\*Weighted using coefficients from regression



## Contents

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- Closure Satisfaction Model
- **Closure Satisfaction by Size of Winery**
- Vendor Satisfaction Model


# Product Performance is the Most Important Factor for Wineries of All Sizes

## Consumer Perception is Very Important to Large Wineries

## Ease of Removal is Important to Midsize Wineries

*% Contribution to Overall Satisfaction With Closure Type by Winery Size*

	Overall		Small Wineries	Mid-Size Wineries	Large Wineries
Price	3%		3%	3%	9%
Bottling Line Performance	22%		21%	12%	19%
Product Performance	44%		41%	58%	35%
Consumer Perception	17%		18%	0%	34%
Ease of Removal	15%		16%	26%	3%

 Largest Change From Overall Level of Importance

\*Small: < 50,000 cases

Midsize: between 50,000 and 500,000 cases

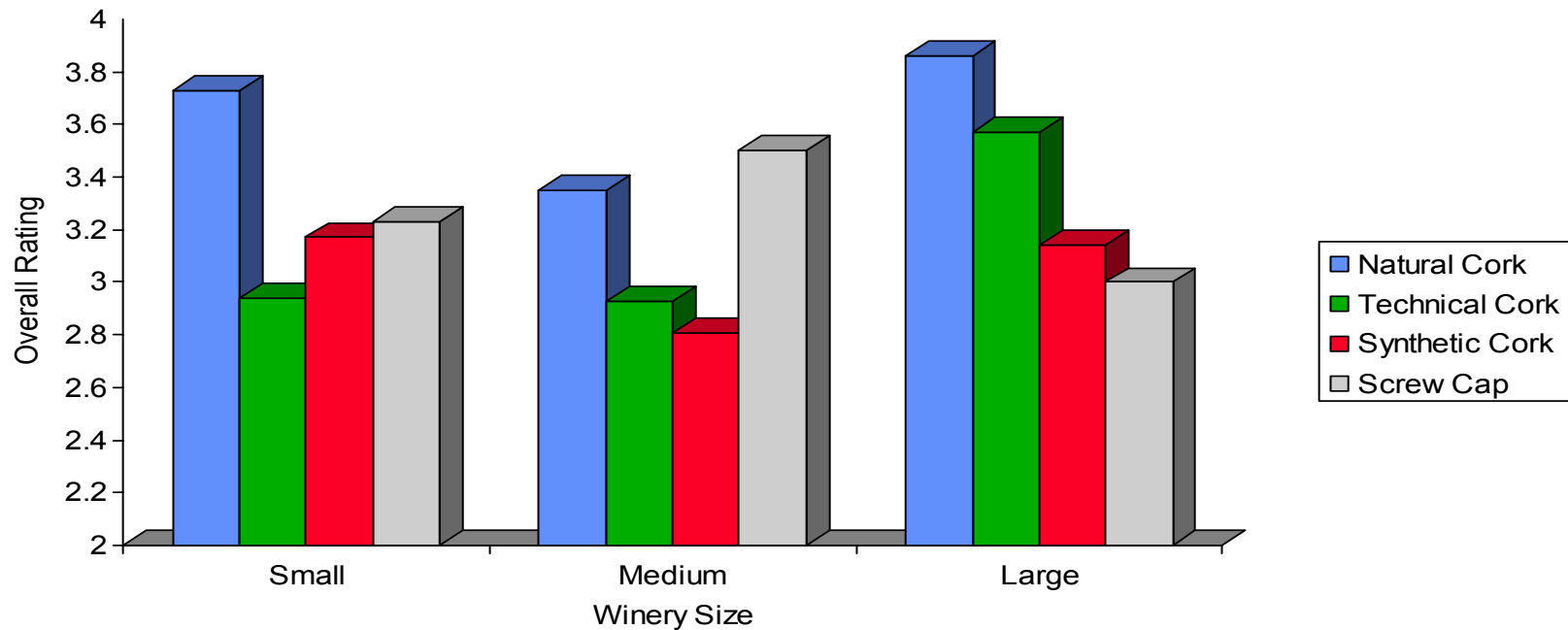
Large: > 500,000 cases

**Small Wineries Rate Natural Cork Significantly Higher Than Other Types**

**Medium Wineries Rate Screw Cap The Highest**

**Large Wineries Rate Natural and Technical Cork Significantly Higher**

## Overall Rating Of Closure By Size of Winery



\*Small: < 50,000 cases

Midsized: between 50,000 and 500,000 cases

Large: > 500,000 cases



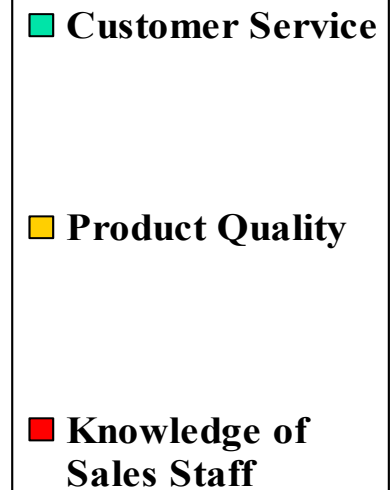
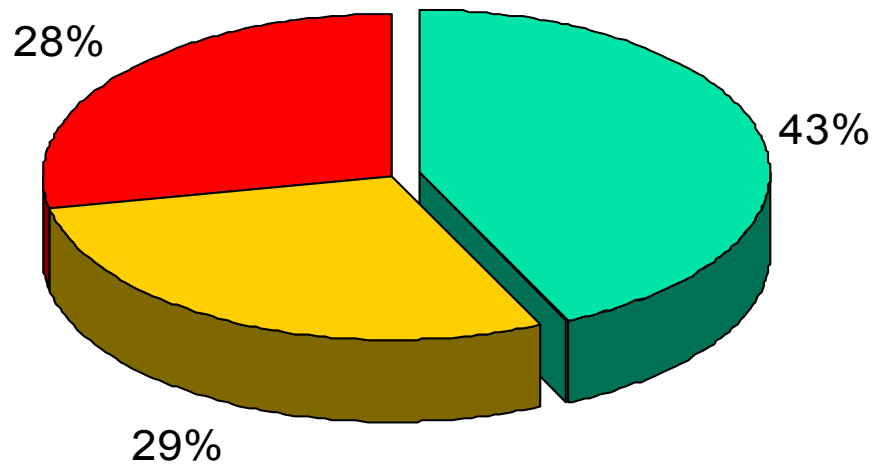
## Contents

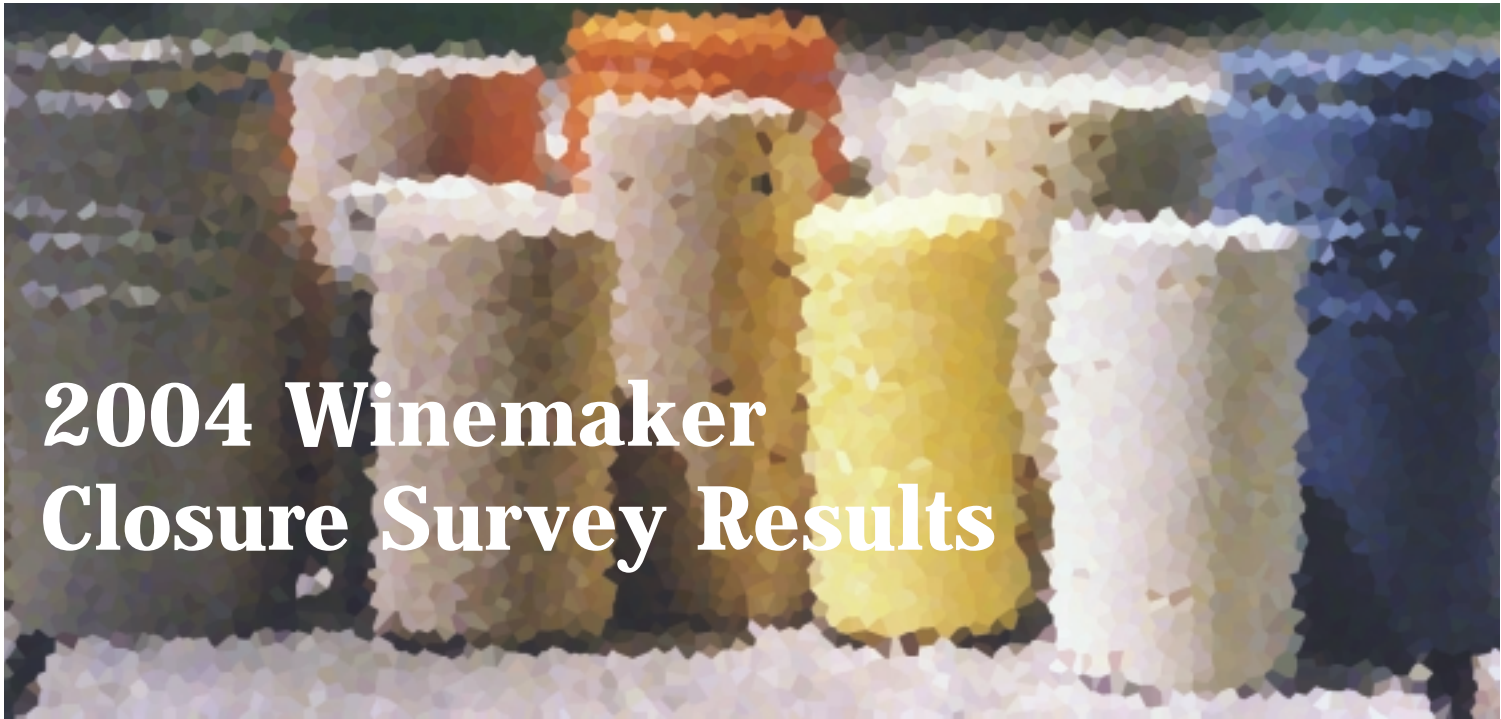
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- Closure Satisfaction Model
- Closure Satisfaction by Size of Winery
- **Vendor Satisfaction Model**

# Wineries Rate Customer Service As The Most Important Factor When Choosing a Closure Vendor

*% Contribution to Overall Satisfaction With Vendor*





# 2004 Winemaker Closure Survey Results

## About the Survey

*Wine Business Monthly* conducted our third annual Winemaker Closure Survey online during March and April. Approximately 150 wineries completed the survey. The purpose of the survey was to determine wineries' perceptions of the four types of closures and to see how these perceptions might influence which closures wineries choose for their wines in the future. The four types of closures we asked about were:

- Natural Corks
- Technical Corks: 1+1, 2+2, agglomerated cork, colmated cork, etc.
- Synthetic Closures: 100 percent plastic, extruded or molded
- Screw Caps

The target respondents for our survey were winemakers, owners, buyers and others in a winery that are involved in the decision regarding which type of closure to use. TABLE 1 shows the function of our survey respondents (many respondents indicated that they perform more than one function).

TABLE 1: Function of Respondents

Winemaking	70%	President/Owner/GM	55%
Cellar/Production	24%	Buyer/Purchasing	29%
Viticulture	18%	Tasting Room	14%
Sales/Marketing	23%		

We also worked to make sure that we had an adequate representation of small, medium sized and large wineries that responded to the survey. TABLE 2 shows the size, in terms of yearly case production, of wineries that responded to the survey.

TABLE 2: Size of Winery

Winery Size	Percentage of 2004 Closure Survey
Under 1,000	18%
1,000-2,499	16%
2,500-4,999	12%
5,000-9,999	12%
10,000-24,999	17%
25,000-49,999	7%
50,000-99,999	5%
100,000-499,999	7%
500,000-999,999	3%
1,000,000 +	2%

### Winery Size Classification (within WBM closure survey)

Small	under 49,000
Mid-Size	50,000 – 499,999
Large	over 500,000

## Summary of Findings

- Natural corks continue to dominate the market in wines with a retail price over \$10
- Large wineries are consolidating the number of vendors from which they purchase closures
- Synthetic closures making significant inroads, perhaps at the expense of technical corks
- Screw caps are continuing to gain acceptance

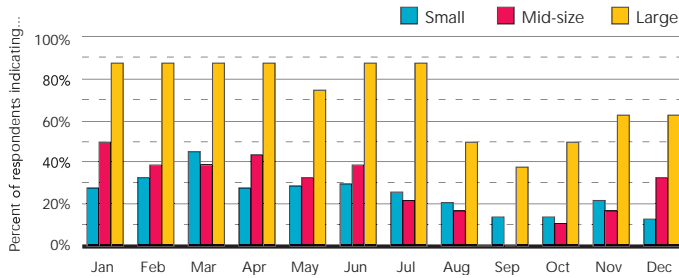
## Purchasing Behavior

### Annual Cycles

CHART 1 shows the annualized closure buying trends for the wine-industry by winery-size. From this chart we see that different-sized wineries have distinctly different buying cycles.

CHART 1

What months do you place your closure orders? (choose all that apply)



Small wineries (under 49,000 cases per year) tend to buy most of their closures between January and July. This is understandable as the smaller staff-size of these wineries dictates that their cellar-workers do double duty on the bottling line and as such would tend to be unavailable during crush. Consequently, most small wineries do not bottle from August through November.

The mid-sized wineries (between 50,000 and 499,000 cases per year) are in a similar predicament, insofar as most cease bottling during crush, even if they use distinct bottling and cellar crews. The closure-purchase pattern for these wineries appears to surge on a quarterly basis. The largest number of mid-sized wineries buy closures at the beginning of each quarter with sales-spikes during January and April dominating the much smaller surge in July. Because of harvest, closure-purchases during the fourth quarter appear to be concentrated in the last half of the quarter (November and December).

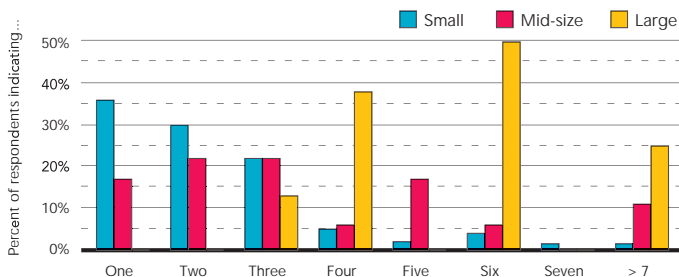
Large wineries (over 500,000 cases per year), probably due to their larger staffs and facilities, have much more normalized buying patterns with closure-purchases being made pretty-much all the time.

### Closure Shopping Patterns

In CHART 2, we see that most wineries tend to contact three vendors during their RFQ process. Small wineries tend to contact no more than three vendors, with over 40 percent getting quotes from only a single supplier. Mid-sized wineries appear to request quotes from one to six vendors with most contacting only two or three vendors. About one-quarter of large wineries stated that they contact more than seven vendors when shopping for closures. Another 38 percent reported that they contact four vendors during the RFQ process.

CHART 2

When preparing to purchase closures, how many vendors do you contact?

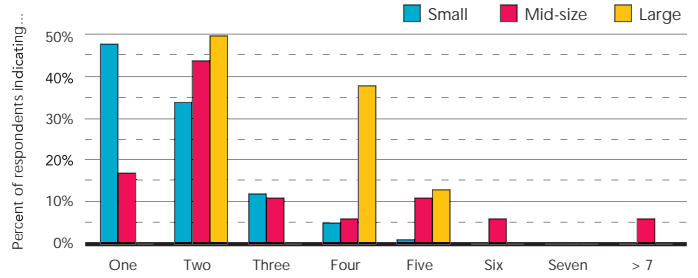


### Sources Used

As we can see in CHART 3, most wineries buy closures from fewer than four vendors. However, a significant minority (13 percent) of the respondents from large wineries, reported that they buy closures from five vendors. We can also see that 48 percent of the respondents from small wineries purchase closure from a single vendor.

CHART 3

How many closure vendors do you purchase from in a twelve month period?



When these responses are compared to those from last year, as seen in CHART 4, we see that the respondents from small and mid-sized wineries appear to be spreading out their closure purchases among more vendors. At the same time, the respondents from large wineries seem to be consolidating their purchases with fewer closure-suppliers. Significantly this year, no respondents from large wineries stated that they purchase closures from more than five vendors.

CHART 4

How many closure vendors do you purchase from in a twelve month period?

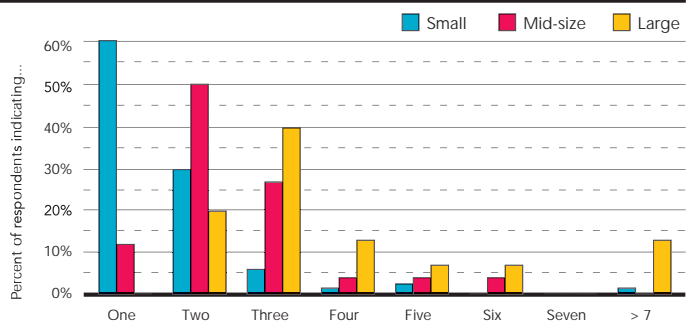
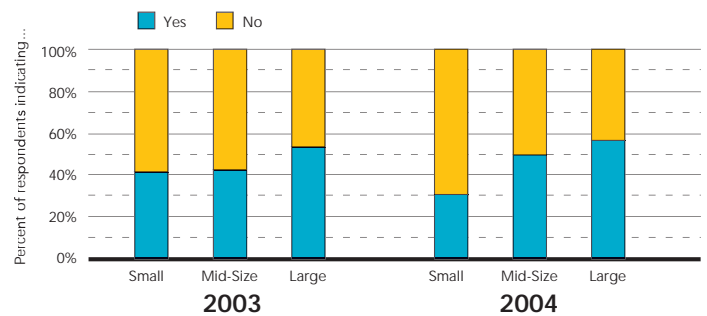


CHART 5 shows that both mid-sized and large wineries are actively consolidating the number of closure vendors from which they purchase closures. Fewer respondents from small wineries are looking to decrease the number of closure sources.

CHART 5

Are you consolidating the number of vendors?



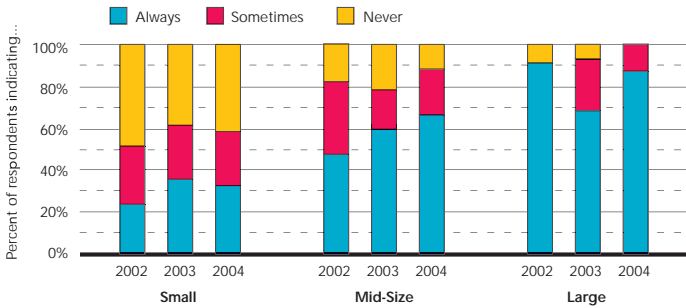
## Quality Assurance

### Pre-Shipment Testing

Around one quarter of all respondents reported that they sometimes quality-test sample closures prior to receiving their shipments (CHART 6). This remains consistent with our previous surveys.

CHART 6

#### Quality test on pre-shipment sample?



When the responses are separated by winery size, we see that more than 40 percent of the respondents from small wineries reported that they do not conduct any pre-shipment quality tests on the closures that they purchase. Conversely, almost 90 percent of the respondents from large wineries stated that they always conduct pre-shipment quality tests. Significantly, all the respondents from large wineries stated that they test pre-shipment samples at least some of the time.

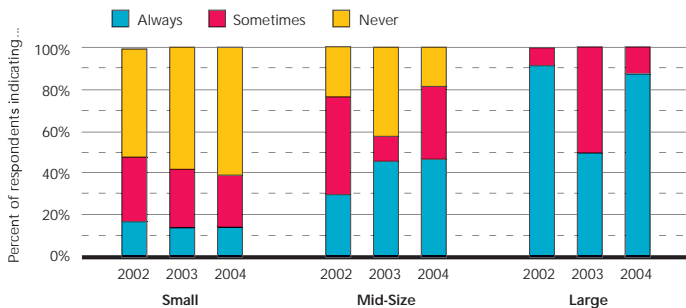
### Testing Closures When They Arrive at the Winery

Almost 90 percent of the respondents from large wineries stated that they test every shipment of closures that arrive in the winery. The remainder of these respondents stated that they check closures at least some of the time.

Quality assurance appears to be receiving more attention in the mid-sized wineries with more than 80 percent of the respondents from these wineries stating that they test at least some of their closure shipments as they arrive (CHART 7).

CHART 7

#### Quality test when shipment arrives?



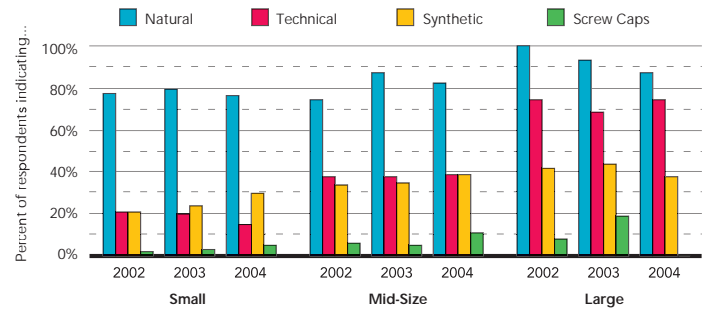
## Current Closure Trends

CHART 8 shows the types of closures used by our respondents. The vast majority of respondents use natural corks (78 percent). This is down four percent from last year's survey, but only one percent lower than the 2002 closure survey.

Significant numbers of wineries are using technical corks (21 percent) and synthetic closures (31 percent). The number of respondents stating that they are using technical corks has been slowly, but steadily, decreasing with each succeeding closure survey, with the responses decreasing from 30 percent in 2002 to 21 percent in 2004. At the same time, the number of respondents stating that they are using synthetic closures has been similarly increasing from 26 percent in the 2002 survey to 31 percent in the 2004 survey.

CHART 8

#### Type of closures that your winery currently uses?



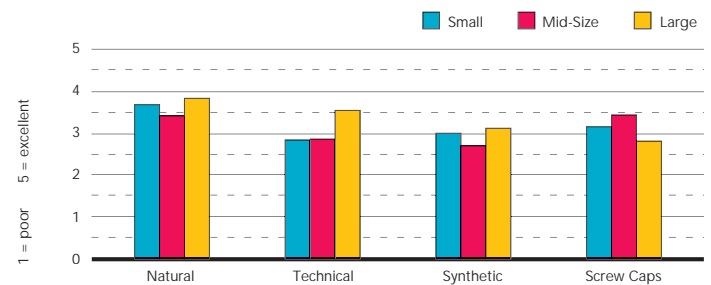
Only five percent of respondents are using screw caps, a consistent one percent per year gain since the 2002 survey. It should be noted that the numbers add up to more than 100 percent because many respondents indicated that they use more than one type of closure at their winery.

## Attributes of Importance

The next chart (CHART 9) presents the respondents overall ratings for selected closure attributes. In the 2004 closure survey we asked the respondents to rate the four classes of closures in terms of price, performance on the bottling line, ability to protect wine, customer perception and acceptance, as well as ease of removal.

CHART 9

#### Rate closures for overall rating



The next series of charts provide a more detailed look at the important closure-attributes. CHART 10 [Q18 size trend] shows the price-ratings for various types of closures. An interesting point we see in this chart is that the large wineries are price-insensitive when it comes to natural corks. Furthermore, the large wineries appear to have become increasingly insensitive to price with each successive closure survey. Anecdotal evidence suggests that large wineries have already converted to other closures for wines in their value-priced categories.

CHART 10

#### Rate closures for price

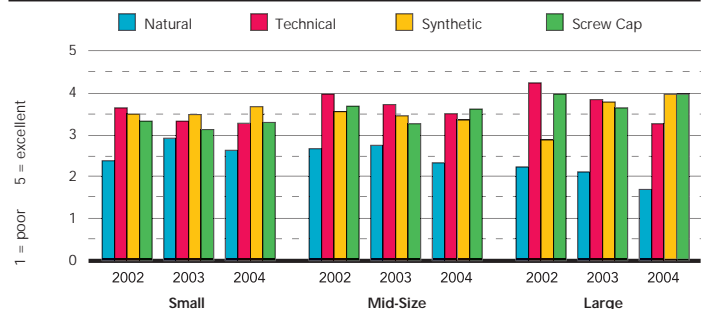


CHART 11 shows the bottling-line performance-ratings for various types of closures. Natural corks are rated ahead of all other closures in terms of performance on the bottling-line. At the same time, screw caps received the lowest marks for bottling-line performance from the respondents from the largest and smallest wineries. Respondents from mid-sized wineries rated screw caps ahead of synthetic closures and at about the same level as technical corks.

CHART 11  
Rate closures for bottling line

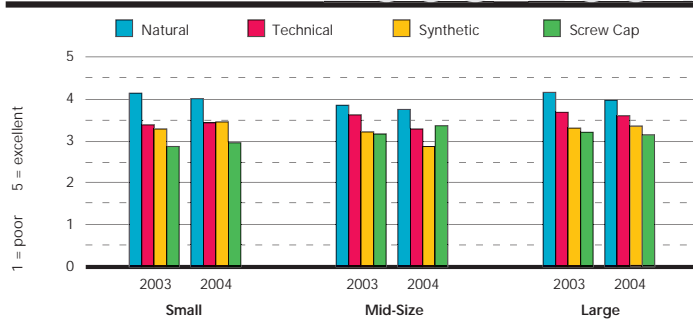


CHART 12 shows the protection performance-ratings for various types of closures. Screw caps received high marks from respondents from large wineries when it came to rating the wine-protection attributes of the various closure-types. It should be noted however, that the respondents from large wineries did not appear to be as optimistic as those from the 2003 closure survey when it came to rating screw caps in this category. Similarly, the respondents from mid-sized wineries rated synthetic closures very low in terms of wine protection.

CHART 12  
Rate closures for product performance

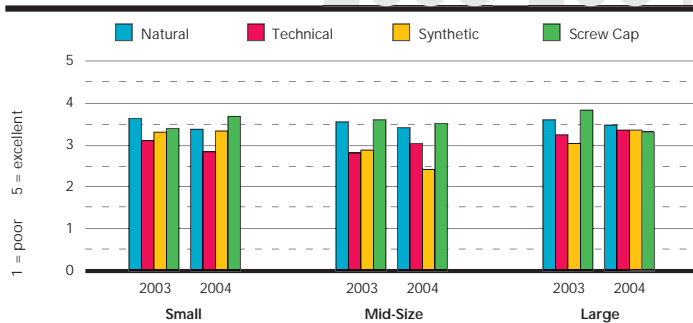
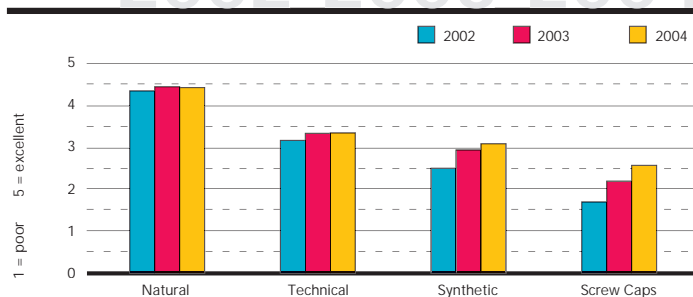


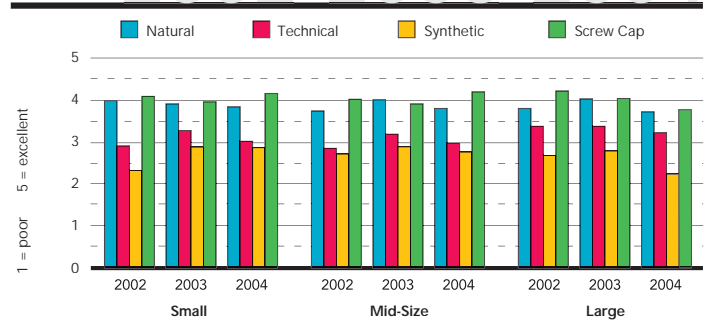
CHART 13 shows how natural cork was far and away the leader in terms of consumer acceptance. Technical corks' rating for consumer acceptance was slightly positive, while the ratings of synthetic closures and screw caps were negative. The other interesting trend is that the rating for screw caps has increased each year, indicating that wineries believe that consumers are becoming more accepting of screw caps.

CHART 13  
Rate closures for consumer acceptance



The final chart in this series (CHART 14) shows the respondent-ratings for the ease of removal for the various closure-types. Natural corks and screw caps received the highest ratings with screw caps coming out slightly ahead of natural corks this year.

CHART 14  
Rate closures for ease of removal

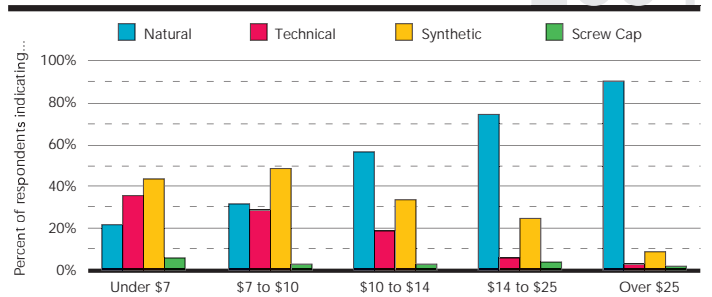


It is quite possible that consumers would find it interesting that screw caps and natural corks received almost the same score for ease of removal from the respondents. It is entirely possible that some respondents were not considering an important difference between natural corks and screw caps: screw caps do not require a separate tool to open the bottle. This automatically increases the difficulty of removal for the consumer. This is an understandable omission, since those of us in the wine industry do tend to carry a corkscrew at all times, but we should remember that most consumers do not.

### Closures and Price Points

We next looked at how the perception of the different closures manifested itself in the wineries' choice of which closure to use at different retail bottle price points. CHART 15 shows that for bottles under \$7 only 22 percent of respondents indicated that they use natural corks, whereas 36 percent said they use technical corks and 44 percent use synthetic closures, up from 22 percent last year. This category has seen a slight decline in the use of screw caps with six percent of the respondents stating that they currently use screw caps for at least part of their under \$7 SRP production, down from nine percent last year.

CHART 15  
Which closures do your winery use at each retail price point

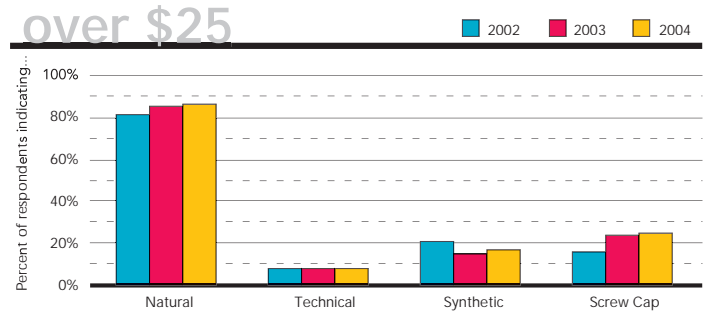
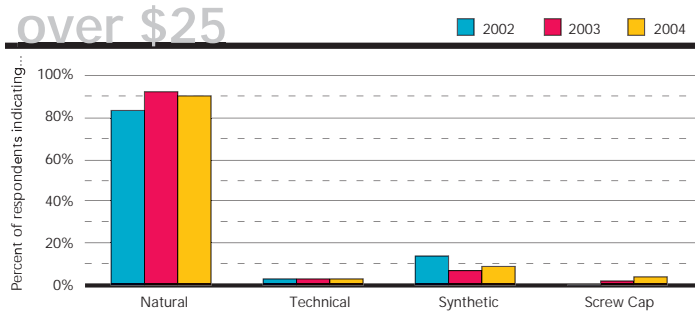
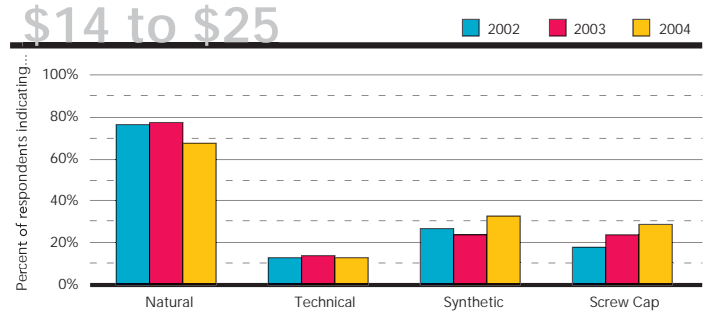
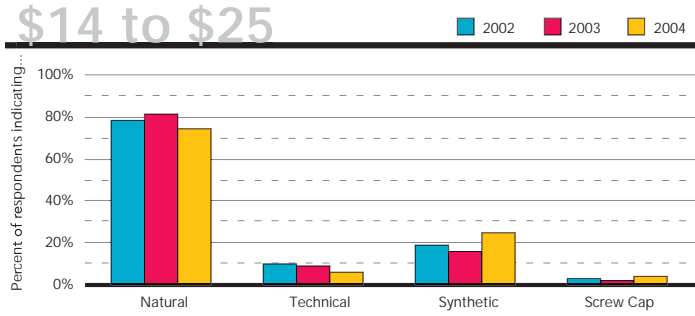
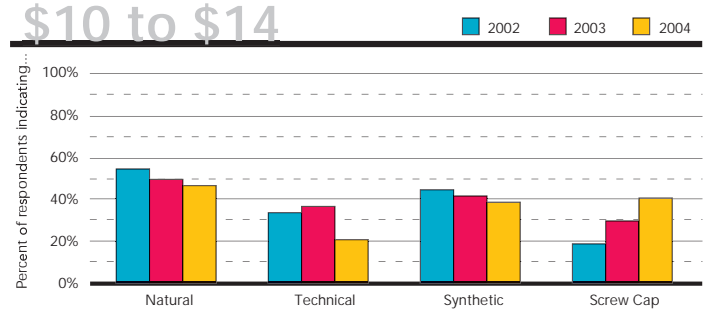
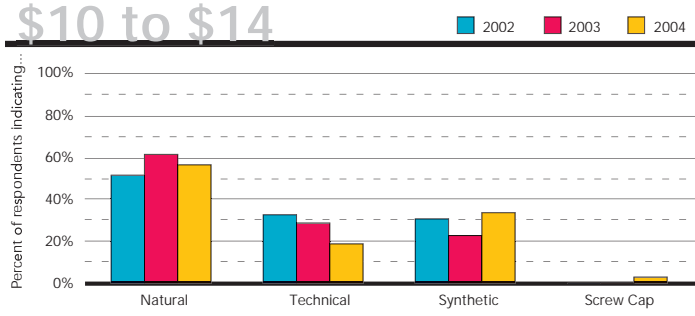
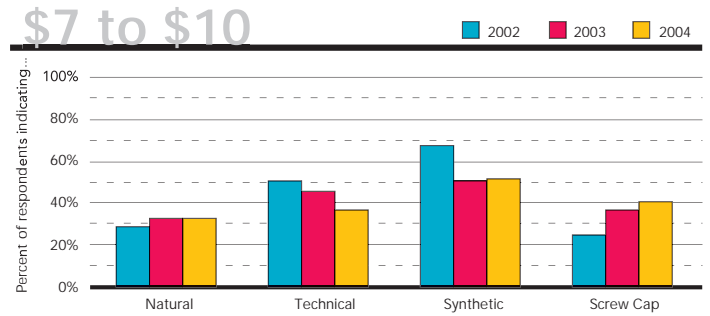
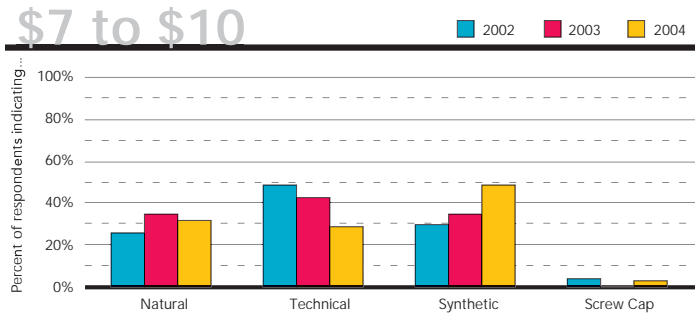
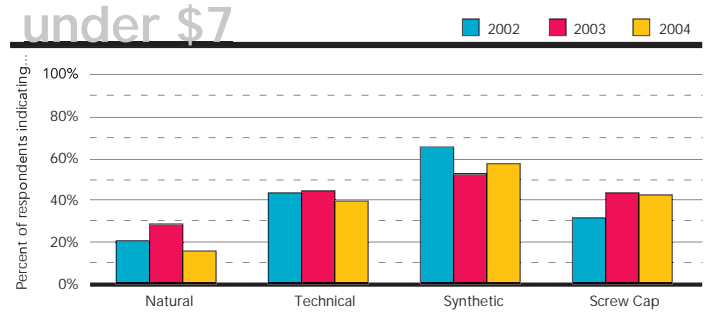
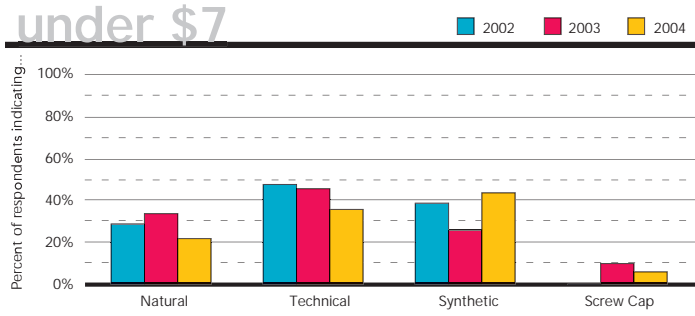


In the over \$25 price segment, 91 percent of respondents indicated they use natural corks, three percent use technical corks, nine percent use synthetic closures (up from six percent last year), while two percent of the respondents indicated that they use screw caps for the over \$25 SRP category (up from one percent last year).

In order to understand how the use of different types of closures may change in the future, we asked wineries which closures they are considering using in each of the different price segments (charts, page 22). Many respondents are considering increasing the use of synthetic closures and screw caps, and correspondingly reducing their use of natural corks and technical corks. Although still quite low at the highest price points, the percentage of respondents considering using synthetic closures and screw caps is growing across all price segments, presumably because

Which closures does your winery use at the retail price of...

Which closures does your winery consider using at the retail price of...



the risk of cork taint with natural corks and technical corks is causing wineries to consider moving to try these other closures.

The move to synthetic closures or screw caps is especially apparent for bottles with a retail price of \$10 or under. In the under \$7 segment, slightly more than half respondents (52 percent) are considering using either synthetic closures (58 percent) or screw caps (43 percent). Respondents could select multiple answers and there was great deal of duplication between the two categories.

In the \$7 to \$10 segment, 52 percent of respondents are considering using synthetic closures while 41 percent are considering screw caps.

The findings also indicate that wineries are increasingly basing their choice of closure on retail bottle price. The survey results suggest that wineries will continue to use natural cork at the higher bottle prices, presumably because the factors that natural cork was rated well on—consumer perception and facilitating the proper aging of wine—are more important in these price segments. In the lower price seg-

ments, \$10 and under, wineries are considering moving to synthetic closures and screw caps, presumably because consumer acceptance and facilitating the proper aging of wine are less important at these price points. wbm

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**Editor's note:** *This survey is not a random, statistically valid survey; rather, this is an informal survey of the readers of our publications. Therefore, please understand that the results shown here are the answers of a sample of wineries and may not accurately reflect the views of the entire wine industry. We are encouraged that we continue to see a steady increase in the rate of response to our surveys. We would like to thank the respondents for participating this year. We would also like to encourage our readers to participate in future surveys as higher response-rates will only increase the utility of our surveys.*

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## ORIGINAL QUESTIONS :

## Wine Business 2004 Closure Survey

The term closure in this survey includes all of the following:

**Natural corks**

**Technical corks** (1+1, 2+2, Agglo, composite cork, etc.)

**Synthetic closures** (100% plastic, extruded or molded)

**Screwcaps**

- 1) Email:
- 2) Company:
- 3) State:

## General Questions

- 4) What type of business is your company?
  - Winery (or Winery & Grower)
  - Grower
  - Other (Please specify)
- 5) What is your Job Function? (check as many as appropriate)
  - Winemaking
  - Viticulture
  - President/Owner/GM
  - Tasting Room
  - Cellar/Production
  - Sales/Marketing
  - Buyer/Purchasing
  - Other
- 6) Please indicate the size of your winery? (Case Production)
  - Under 1000
  - 1,000 - 2,499
  - 2,500 - 4,999
  - 5,000 - 9,999
  - 10,000 - 24,999
  - 25,000 - 49,999
  - 50,000 - 99,999
  - 100,000 - 499,999
  - 500,000 - 999,999
  - 1,000,000 +
- 7) What type of wine does your winery primarily produce?
  - Reds
  - Whites
  - Both equally

## Closures

- 8) What months do you place your closure orders? (choose all that apply)
  - Jan Feb Mar Apr May June July Aug Sept Oct Nov Dec
- 9) When preparing to purchase closures, how many vendors do you contact?
  - one two three four five six seven more than seven
- 10) How many closure vendors do you purchase from in a twelve month period?
  - one two three four five six seven more than seven
- 11) If you use more than one vendor, are you consolidating the number of vendors from whom you purchase your closures?
  - Yes No
- 12) Please indicate the level of involvement in the closure purchase decision of the following people in your winery (choose all that apply)
  - 1=No Involvement.
  - 2=Participate in product decisions.
  - 3=Select product but not supplier.
  - 4=Select product and supplier.
  - 5=Approves the purchase decision.

1	2	3	4	5
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  - Winemaker/Enologist
  - Owner/Proprietor

CEO/President/General Manager  
 VP/CFO/Controller  
 Marketing/Sales  
 Buyer/Purchasing Manager  
 Other:

- 13) Does your winery perform a quality test on a pre-shipment sample before accepting a shipment of closures?
  - Always Sometimes Never
- 14) Does your winery perform a quality test on the whole shipment of closures when it arrives from the vendor?
  - Always Sometimes Never
- 15) If using Natural corks, Technical corks or Synthetic closures, what length do you use? (Select all that apply)
  - 38 mm 44 mm 49 mm 54 mm other: \_\_\_\_mm
- 16) Please indicate what type of closures your winery currently uses on 750 mL bottles? (Select as many as appropriate)
  - Natural Corks Technical Corks Synthetic Corks screwcaps other:
- 17) What was the approximate ratio of usage of each type of closure for 750 mL bottles in your winery
  - \*(example: 80% naturalcorks, 10% technical, 10% synthetic, 0% screwcap)
  - In 2003?
    - % Natural Corks % Technical Corks % Synthetic Corks % Screwcaps
  - What is the ratio in 2004?
    - % Natural Corks % Technical Corks % Synthetic Corks % Screwcaps
- 18) Please rate each of the closures in terms of price
  - Very Negative Negative Neutral Positive Very Positive
  - Natural Cork
  - Technical Cork
  - Synthetic Cork
  - Screw Cap
- 19) Please rate each of the closures in terms of bottling line performance
  - Very Negative Negative Neutral Positive Very Positive
  - Natural Cork
  - Technical Cork
  - Synthetic Cork
  - Screw Cap
- 20) Please rate each of the closures in terms of product performance - protecting your wine
  - Very Negative Negative Neutral Positive Very Positive
  - Natural Cork
  - Technical Cork
  - Synthetic Cork
  - Screw Cap
- 21) Please rate each of the closures in terms of Consumer Acceptance/Perception
  - Very Negative Negative Neutral Positive Very Positive
  - Natural Cork
  - Technical Cork
  - Synthetic Cork
  - Screw Cap
- 22) Please rate each of the closures in terms of Ease of Removal of Closure
  - Very Negative Negative Neutral Positive Very Positive
  - Natural Cork
  - Technical Cork
  - Synthetic Cork
  - Screw Cap
- 23) Please provide an overall rating for each of the closures listed
  - Very Negative Negative Neutral Positive Very Positive

- Natural Cork
- Technical Cork
- Synthetic Cork
- Screw Cap

24) Please indicate which closures your winery uses at each retail bottle price point for 750 mL bottles (choose all that apply)

- |             |              |                |                |          |
|-------------|--------------|----------------|----------------|----------|
|             | Natural Cork | Technical Cork | Synthetic Cork | Screwcap |
| Under \$7   |              |                |                |          |
| \$7 - \$10  |              |                |                |          |
| \$10 - \$14 |              |                |                |          |
| \$14 - \$25 |              |                |                |          |
| Over \$25   |              |                |                |          |

25) Please indicate which closures you would consider using at each retail bottle price point for 750 mL bottles (choose all that apply)

- |             |              |                |                |          |
|-------------|--------------|----------------|----------------|----------|
|             | Natural Cork | Technical Cork | Synthetic Cork | Screwcap |
| Under \$7   |              |                |                |          |
| \$7 - \$10  |              |                |                |          |
| \$10 - \$14 |              |                |                |          |
| \$14 - \$25 |              |                |                |          |
| Over \$25   |              |                |                |          |

**Vendors**

\*Individual responses regarding vendors will not be made public

26) Please indicate your familiarity with following closure vendors:

- |                         |               |           |            |
|-------------------------|---------------|-----------|------------|
|                         | Currently Use | Have Used | Never Used |
| Amorim Cork America     |               |           |            |
| APM                     |               |           |            |
| California Glass        |               |           |            |
| Cork Supply USA         |               |           |            |
| Diablo Valley Packaging |               |           |            |
| Italcork / Ganau        |               |           |            |
| Juvenal Direct          |               |           |            |
| Lafitte                 |               |           |            |
| MA Silva                |               |           |            |
| G-3 Enterprises         |               |           |            |
| Neocork                 |               |           |            |
| Nomacorc                |               |           |            |
| Pechiney (Stelvin)      |               |           |            |
| Portocork               |               |           |            |
| Rich Xiberta            |               |           |            |
| Sabaté USA              |               |           |            |
| Scott Labs              |               |           |            |
| Supremecorq             |               |           |            |
| Vinocor USA             |               |           |            |
| Other:                  |               |           |            |

27) Please rate the following vendors in terms of quality (product performance) (1= poor quality, 5= great quality)

- |                         |   |   |   |   |   |
|-------------------------|---|---|---|---|---|
|                         | 1 | 2 | 3 | 4 | 5 |
| Amorim Cork America     |   |   |   |   |   |
| APM                     |   |   |   |   |   |
| California Glass        |   |   |   |   |   |
| Cork Supply USA         |   |   |   |   |   |
| Diablo Valley Packaging |   |   |   |   |   |
| Italcork / Ganau        |   |   |   |   |   |
| Juvenal Direct          |   |   |   |   |   |
| Lafitte                 |   |   |   |   |   |
| MA Silva                |   |   |   |   |   |
| G-3 Enterprises         |   |   |   |   |   |
| Neocork                 |   |   |   |   |   |
| Nomacorc                |   |   |   |   |   |
| Pechiney (Stelvin)      |   |   |   |   |   |
| Portocork               |   |   |   |   |   |
| Rich Xiberta            |   |   |   |   |   |
| Sabaté USA              |   |   |   |   |   |
| Scott Labs              |   |   |   |   |   |
| Supremecorq             |   |   |   |   |   |
| Vinocor USA             |   |   |   |   |   |
| Other:                  |   |   |   |   |   |

28) Please rate the following vendors in knowledge of sales staff: (1= poor knowledge, 5= great knowledge)

- |                         |   |   |   |   |   |
|-------------------------|---|---|---|---|---|
|                         | 1 | 2 | 3 | 4 | 5 |
| Amorim Cork America     |   |   |   |   |   |
| APM                     |   |   |   |   |   |
| California Glass        |   |   |   |   |   |
| Cork Supply USA         |   |   |   |   |   |
| Diablo Valley Packaging |   |   |   |   |   |
| Italcork / Ganau        |   |   |   |   |   |
| Juvenal Direct          |   |   |   |   |   |
| Lafitte                 |   |   |   |   |   |
| MA Silva                |   |   |   |   |   |
| G-3 Enterprises         |   |   |   |   |   |
| Neocork                 |   |   |   |   |   |
| Nomacorc                |   |   |   |   |   |
| Pechiney (Stelvin)      |   |   |   |   |   |
| Portocork               |   |   |   |   |   |
| Rich Xiberta            |   |   |   |   |   |
| Sabaté USA              |   |   |   |   |   |
| Scott Labs              |   |   |   |   |   |
| Supremecorq             |   |   |   |   |   |
| Vinocor USA             |   |   |   |   |   |
| Other:                  |   |   |   |   |   |

29) Please rate the following vendors in terms of customer service (1= poor customer services, 5= great customer service)

- |                         |   |   |   |   |   |
|-------------------------|---|---|---|---|---|
|                         | 1 | 2 | 3 | 4 | 5 |
| Amorim Cork America     |   |   |   |   |   |
| APM                     |   |   |   |   |   |
| California Glass        |   |   |   |   |   |
| Cork Supply USA         |   |   |   |   |   |
| Diablo Valley Packaging |   |   |   |   |   |
| Italcork / Ganau        |   |   |   |   |   |
| Juvenal Direct          |   |   |   |   |   |
| Lafitte                 |   |   |   |   |   |
| MA Silva                |   |   |   |   |   |
| G-3 Enterprises         |   |   |   |   |   |
| Neocork                 |   |   |   |   |   |
| Nomacorc                |   |   |   |   |   |
| Pechiney (Stelvin)      |   |   |   |   |   |
| Portocork               |   |   |   |   |   |
| Rich Xiberta            |   |   |   |   |   |
| Sabaté USA              |   |   |   |   |   |
| Scott Labs              |   |   |   |   |   |
| Supremecorq             |   |   |   |   |   |
| Vinocor USA             |   |   |   |   |   |
| Other:                  |   |   |   |   |   |

30) Please provide an overall rating for the following vendors (1= poor, 5= great)

- |                         |   |   |   |   |   |
|-------------------------|---|---|---|---|---|
|                         | 1 | 2 | 3 | 4 | 5 |
| Amorim Cork America     |   |   |   |   |   |
| APM                     |   |   |   |   |   |
| California Glass        |   |   |   |   |   |
| Cork Supply USA         |   |   |   |   |   |
| Diablo Valley Packaging |   |   |   |   |   |
| Italcork / Ganau        |   |   |   |   |   |
| Juvenal Direct          |   |   |   |   |   |
| Lafitte                 |   |   |   |   |   |
| MA Silva                |   |   |   |   |   |
| G-3 Enterprises         |   |   |   |   |   |
| Neocork                 |   |   |   |   |   |
| Nomacorc                |   |   |   |   |   |
| Pechiney (Stelvin)      |   |   |   |   |   |
| Portocork               |   |   |   |   |   |
| Rich Xiberta            |   |   |   |   |   |
| Sabaté USA              |   |   |   |   |   |
| Scott Labs              |   |   |   |   |   |
| Supremecorq             |   |   |   |   |   |
| Vinocor USA             |   |   |   |   |   |
| Other:                  |   |   |   |   |   |

Thank you for taking the time to complete this survey