

Summary of results of large case customer questionnaire

1. Short questionnaires were sent to the top 15 case customers of both DS Smith and Linpac to help inform our understanding of case customer requirements and evaluate whether there was a particular market niche which only the largest suppliers could serve. Of the 30 questionnaires sent, we received 19 responses and one nil return. This appendix provides a brief summary.
2. The first issue that we explored was the extent to which these customers used suppliers other than DS Smith/Linpac or considered other suppliers to be credible alternatives.¹ The number of suppliers used in the last 12 months ranged between 1 and 13. The lowest number of credible suppliers was 2, though the average (mean) response to this question was 6.5, and the maximum was 13.
3. We then asked about the identity of actual and potential suppliers (excluding DS Smith and Linpac). The results are shown in Table 1. As would be expected, the larger players were mentioned most frequently, but smaller suppliers, such as Rigid, Encase and Cepac, were also considered to be credible by a significant proportion of the larger customers.

TABLE 1 Use of suppliers

	<i>Used in last 12 months</i>	<i>Credible alternative</i>	<i>Total mentions</i>

Source: CC, large case customer questionnaire.

[X]

4. We then asked about the criteria necessary for a supplier to be considered credible by these customers. The most significant were the British Retail Consortium/Institute of Packaging criteria, followed by ISO 9001 and purchasers' own audits (see Table 2).

¹[X]

TABLE 2 **Criteria for supplier to be considered credible**

	<i>Requirement</i>	<i>Preference</i>	<i>Total</i>
BRC/IOP	9	1	10
ISO 9001	7	2	9
Own audit	6	0	6
Other*	4	0	4
None	1	0	1

Source: CC, large case customer questionnaire.

*Note: 'Others' were HACCP ('Hazard Analysis Critical Control Point System'—a food hygiene certification standard) (1), packaging regulations (1), distance to plant (1), need for corrugator on site (1).

- Finally, the questionnaire asked about the importance of operating a national service, for example by operating more than one site. We received a range of responses (see Table 3). The customers who considered that national service was important or very important mentioned the fact that they themselves operated a multi-site business and liked suppliers to reflect this. One customer also mentioned contingency plans. However, other customers with multiple sites took the view that, while a multiple site supplier would be desirable, they would be willing to consider regional supply, if other factors, such as supplier responsiveness or pricing, were favourable.

TABLE 3 **Importance of national service**

<i>How important is national service to you?</i>	<i>Number of mentions</i>
Not important	5
Preferable but not essential	3
Important	3
Very important	6

Source: CC, large case customer questionnaire.