A private sector Agro-Enterprises advice and assistance service to stimulate the successful development of agro-products, enterprises and export markets in Sri Lanka.

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This market research Study was specially commissioned by **AgEnt**'s "Marketing/Agro-Processing Unit" to assist clients to better understand the marketing dynamics of the product sectors below; and is representative of similar pro-active market research studies which **AgEnt** has in-hand or plans to implement in the future

A Survey of the Market for Glass & Tinplate containers in the Processed Fruits & Vegetables Industry

October 1993

This Market Research Study was implemented for **AgEnt** by:

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SRL

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CONTENTS

1.0 BACKGROUND

AgEnt is an advice and assistance service to private sector agro-enterprises in Sri Lanka, funded by USAID, to stimulate the successful development of agro products, enterprises and export markets. They offer a complete advice and assistance package embracing all functions such as production, processing, distribution, marketing, finance, training and joint venture development. Sri Lankan food processing companies have been regularly complaining about the high cost and non availability of a different types and sizes of glass and tinplate containers for packaging their products. AgEnt wanted to conduct a survey of the food processing industries to assess the dimensions of this problem to assist them to overcome it. For this purpose Survey Research Lanka (Pvt.) Ltd. (SRL) was requested to conduct an appropriate survey.

2.0 OBJECTIVES

The primary objectives of the study were:

1. To determine the dimensions of the packaging problems faced by the processors of fruits and vegetables.

2. To determine the views and perceptions of food processors pertaining to availability, quality and costs of packaging materials.

3.0 SCOPE

To achieve the above objectives, data was sought with regard to :

Purchase and Usage patterns of different packaging materials.

Comparative Cost Structure

Perceptions: Opinions and Attitudes

Perceived favourable and unfavourable attitudes of products currently available

4.0 METHODOLOGY & SAMPLE DESIGN

A sample of 15 companies engaged in processing of fruits and vegetables were selected for the purpose of this survey.

The survey location was mainly within the Greater Colombo region since most manufacturers are located within this region. This included the administrative districts of Colombo, Gampaha and Kalutara.

The technique of judgmental/quota sampling was used to select the members of the sample. A semi-structured questionnaire was developed and administered to the person knowledgeable and responsible for deciding as to what packaging materials to purchase in each of the sample organisations at a face-to-face interview. The questionnaire is given in Appendix One. After summarising the main findings of the survey, key persons of the glass company and the metal can manufacturing company were also interviewed to identify their perceptions about the market for food containers.

5.0 FINDINGS OF THE SURVEY

5.1 Profile of the Sample

5.1.1 Products Manufactured by the Sample Members

The different products manufactured by the sample members are as follows.

Product	No. of Companies	Percentage of Sample
Jams	10	76.9
Cordials	9	69.2
Chutney & Pickles	7	53.8
Sauces	7	53.8
Ready to serve drinks	8	61.5
Single strength fruit juices	3	23.1
Liquid Coconut Milk	1	7.7
Other:Mustard Cream	1	7.7

When the sample members were analysed according to the number of different products they manufacture the distribution is shown in the following table.

No of Products	No. of Companies	Percentage of Sample
Five	7	53.8
Three	2	15.4
One	4	30.8
Total	13	100

Two of the single product companies are engaged in 'Ready to Serve Drinks' and one each are engaged in the manufacture of liquid coconut milk and jams.

5.1.2 Legal Status

The legal status of the sample members are as follows.

Legal Status	No. of Companies	Percentage of Sample
Private, Limited Liability	7	53.8
Public, Limited Liability N.q.	3	23.1
Public, Limited Liability quoted.	2	15.4
Sole Proprietor	1	7.7
Total	13	100

The majority are private limited liability companies.

5.1.3 Size: Number of Employees

According to the total number of employees the sample members belong to following categories.

No of Employees	No. of Companies	Percentage of Sample
More than 20 up to 50	4	30.8
More than 50 up to 100	5	38.5
More than 100	4	30.8
Total	13	100

On an average one company has about 90 employees.

5.1.4 Size: Monthly Turnover

According to the monthly turnover the sample members belong to following categories.

Monthly Turnover (Rs. Millions)	No. of Companies	Percentage of Sample
Up to 1 million	3	25
More than 1 up to 3	5	41.7
More than 3 up to 5	1	8.3
More than 5 million	3	25
Total	12	100

On an average one company has a monthly turnover of about Rs. 2.8 million. One of the sample members is a new company who had not started serial production at the time of interview. It was left out when calculating percentages and average turnover.

5.2 Purchase and Usage Patterns of Packaging Materials

5.2.1 Packaging Materials Used

Different packaging materials and the number of companies using those materials are as follows.

Packaging Material	No. of Companies	Percentage of Sample
Glass Jars	10	76.9
Glass Bottles	11	84.6
Metal Cans**[1]	6	46.2
Caps and Closures	12	92.3

**1: Out of the six companies two have not used any cans in the recent past. They possess the equipment for canning but kept unused mainly due to high cost and difficulties in obtaining cans.

Caps and closures include 'Omnia' and Lug caps for jam jars, ROPP caps and Crown Corks. Some sample members indicated they have planned to introduce other packaging materials such as 'Doy Pac' ' or 'Standing Pouches' and PET bottles. None of the sample members are using these materials at present.

5.2.2 Suppliers of Packaging Materials

Only supplier of metal food cans is Metal Packaging Ltd. the sister company of AMICO Industries (Pvt.) Ltd.. These two companies are the major suppliers of metal caps and closures for glass jars and bottles. Wilton Metal Box Co. (Pvt.) Ltd.

and Bestrades are the other two companies who are manufacturing Crown Corks and ROPP caps. Glass jars and Glass bottles are manufactured and supplied only by Ceylon Glass Company Ltd. . However this company had not produced any jars during the last one year and supplied containers imported mainly from India.

5.2.3 Annual Requirements of Packaging Materials

Packaging Material	Size or Type	Annual Requirement
Glass Jars "Omnia"	425g.	2,270,000
Glass Jars "Lug Cap"	425g.	2.498,000
Glass Jars	275g.	400,000
Glass Bottles	750m.l.	2,324,000
Glass Bottles	325m.l.	1,648,000
Glass Bottles	190m.l.	838,600
Metal Cans	A1	1,900,000
Metal Cans	A2	235,000
Metal Cans	A21/2	155,000
Metal Cans	A10	145,000

Total requirement of different packaging materials among 11 sample members are as shown in previous table. The 11 sample members account for more than 90% of the processed fruit and vegetable products manufactured in this country. The total

demand for above packaging materials in this sector can be estimated by dividing the above figures by a factor which takes the proportion of companies surveyed from the total in the industry into consideration. For 190 m.l. glass bottles and metal containers this factor is about 0.75 and other glass containers it is about 0.85. However that estimate is subjected to the assumption that the supply situation of cans and jars will remain the same as at present.

5.2.4 Usage of Different Packaging Materials

Packaging Material	Size or Type	Products
Glass Jars "Omnia"	425g.	Jam, Chutney, Preserves
Glass Jars "Lug Cap"	425g.	Jam, Chutney, Pickles
Glass Jars	275g.	Jam, Chutney
Glass Bottles	750m.l.	Cordials, Squash
Glass Bottles	325m.l.	Sauces
Glass Bottles	190m.l.	Ready to Serve Drinks
Metal Cans	A1	Coconut Milk, Preserves
Metal Cans	A2	Jams, Fruits in Syrup
Metal Cans	A21/2	Jams, Fruits in Syrup
Metal Cans	A10	Single Strength Fruit juices

Among the sample members the different materials are used for packaging of different products as shown in previous table. Only the commonly packed products are given.

5.3 Cost of Metal Cans and Glass Bottles

Prices at which the F & V processors buy metal cans , glass jars and bottles are as follows. The maximum and minimum prices given by the sample members are shown. They also indicated the cost of packaging as a percentage of their wholesale or ex-factory price. These percentages are given in column four.

Packaging Material	Size or Type	Price Range (Rs.)	Cost as a % of wh. Price
Glass Jars	425g.	5/71 to 7/25	25% to 43%
Glass Bottles	750m.l.	7/50 to 8/63	20% to 32%
Glass Bottles	325m.l.	5/20 to 6/51	20% to 43%
Glass Bottles	190m.l.	5/50 to 7/00	10% to 15%
Metal Cans	A1	5/40 to 8/75(printed)	30% to 40%
Metal Cans	A2	11/75 to 14/85	29% to 40%
Metal Cans	A21/2	13/75 to 14/00	20% to 40%
Metal Cans	A10	33/50 to 34/50	20% to 32%

In the case of ready to serve drinks (190 m.l. glass bottles) the percentage cost is low due to very high rate of reuse ranging from 10 to 50 times. In all other applications of glass jars and bottles new bottles are used 90% of the time. Those who purchase used jars and bottles indicated that it is not economical when you consider the additional cost of sorting and cleaning. Additionally the processors are concerned about the possible contamination of their products with undesirable residues in used bottles.

5.4 Perceptions and Attitudes

5.4.1 User's Ratings of Local Suppliers of Glass Containers and Metal Cans

Sample members were asked to rate the packaging materials they purchase on three attributes, namely availability, quality and cost. Percentage ratings are as shown in following tables.

Glass Jars and Bottles

Attribute	Very High	High	O.K	Poor	Very Poor
Availability	0	0	0	66.7	33.3
Quality	0	8.3	75	16.7	0
	Very Low	Low	O.K	High	Very High
Cost/Price	0	0	16.7	66.7	16.7

Unavailability is the major problem and all sample members rated availability as poor or very poor. 83.3% of the sample members rate the cost of jars and bottles as high or very high. Quality was rated as high or o.k . by 83.3% of the sample members.

Metal Cans

Attribute	Very High	High	O.K	Poor	Very Poor
Availability	0	0	75	25	0
Quality	0	25	50	25	0
	Very Low	Low	O.K	High	Very High
Cost/Price	0	0	25	75	0

In the case of metal cans cost is the major problem and it was rated as high by 75% of the sample members who are using metal cans at present . Availability was rated as O.K by 75% of the users. However there were two other sample members who possess facilities for canning but do not do any canning at present due to high cost and difficulty in obtaining required quantities.

5.4.2 User's Perceptions of Local Supplier of Glass Containers

Ceylon Glass Company (CC), the local manufacturer of glass bottles and jars is considered as unreliable and inconsistent, both in terms of delivery and quality. The industrial disputes and subsequent shutdown of the main furnace had put this

company out of production for about 1 year. Even when the factories were in full production the supply is not regular. Users noted that there is no proper coordination between the head office in Ratmalana and the second factory in Naththandiya. For cordial (750 m.l.) bottles they pay the money in advance at the head office and take a lorry to Naththandiya to collect and find they have nothing in stock. This causes loss of time and money for hiring a lorry and possible loss of sales. Sometimes when the head office say there are no stocks available, large stocks are available at Naththandiya.

Another problem highlighted by the users were the inability of the CGC to face seasonality of demand for glass bottles mainly for ready to serve drinks. These products and other beverages have two high peaks in December and in the months of March and April. The two festive seasons and the first term in schools during which cricket matches and sports meets are held contribute to this high demand for beverages during this period. CGC does not build up sufficient stocks during the off-season (from May to November) so that it can cater to high demand during the season. Users feel that the planning and control of production in CGC is very poor. They also feel that the treatment they receive from this supplier is indifferent and the general attitude is that of a government owned monopoly. There seems to be no response to customer complaints.

There are no major quality problems in general, but the inconsistency is noticed. Impurities and weak points which lead to breakages when washing and filling are some of the problems. Off-standard neck sizes which causes sealing problems have been noticed by the users. They feel this is due to not replacing worn out glass moulds.

Another problem highlighted by the users were the inability of CGC to supply new designs and shapes which gives more modern appearance and economy in transport. Cost of moulds, which is considered as prohibitive discourages them from investing in new designs.

All users consider the CGC is charging them an unfair price using its strength as a monopoly. The high import duty which is now 35% after much lobbying by the fruit and vegetables processors helps the CGC to maintain its prices high. If the import duty is lowered to 10%, landed prices of imports are less than that of the CC's products.

5.4.3 Reuse of Bottles and Jars

Some of the processors were compelled to use second hand jars and bottles collected by 'Pettah Merchants' due to difficulty in obtaining new jars and bottles during the

last one year. However they find this as a costly and troublesome exercise since the sorting and cleaning is very difficult, time consuming and costly. Some of the companies who have introduced bottle deposit scheme claim that they receive about 10% of their bottles through that scheme and risk of contamination is less in that method since the bottles carry the labels of the company. However this scheme was criticised by one processor as a method used by larger manufacturers to pay less turnover tax since the bottle deposit is deducted from retail price to calculate turnover for tax purposes.

5.4.4 The CGC's Perceptions

The CGC is of the opinion that the commissioning of the new furnace (100 M. Tons per day capacity) and resumption of production in November will wipe out the shortages of glass containers in the local market within a very short period. The new furnace has three production lines; two single section lines with six moulds each and one double section line with eight moulds. During the 10 month long shut down of the plant in Ratmalana, jam jars and sauce bottles have been imported from India and Indonesia and supplied to their regular customers. The CGC feels that the market for Jam jars, Cordial Bottles and Sauce Bottles have declined over the years. As an example they quoted sale of jam jars has dropped from 1500 gross per month to 800 gross per month. They believe that the demand for 275 gram jars are rising

due to increasing cost of living and they would introduce that size in 4 to 5 months. Currently their monthly sales of these small jam jars is about 500 gross. Current monthly sales volummes are as follows.

Type of container	Monthly Sales (gross)
Jam Jars 450gms.	800
Jam Jars 225gms.	500
Cordial Bottles	1,000
Sauce Bottles	800

However the sales figures given by the sales department as percentages of their total sales gives a different picture. The data is for the six months from April to September 1993.

Type of container	% of Total Sales
Jam Jars 454gms. Lug Cap	4.66
Jam Jars 454gms. 'Omnia'	3.01
Jam Jars 225gms.	0.50
Cordial Bottles	4.43
Sauce Bottles	1.05
190 m.l. Bottles	0.30
Total sales of food containers	13.95

It should be noted that this is the off-season for beverages and understandably the sale of 190 m.l. bottles are low. The important feature that is revealed by this table is total sales of food containers is only 14% of the glass company's total turnover.

The CGC informed us that all the above types of containers are produced to stock and the sales will be ex-stock. The moulds are changed only once in three months and the stocks are carried to cater to users at all times.

It was also mentioned that the investment required for new moulds Rs. 500,000.00 for single gob moulds and Rs. One Million for double gob moulds. On the single gob line breakeven volume will be 30,000 gross. With the commissioning of the new furnace they can reduce wall thicknesses, but new moulds have to be purchased. The moulds that have been purchased so far will produce products similar in shape, size and thickness to their earlier products.

5.4.5 User's Perceptions of Local Supplier of Metal Cans

Cans are considered as too expensive for the local market and what is packed in cans are generally for export. Except for the company who is packing coconut milk in cans, other users find the local cans as too expensive. Even the cans imported from India found to be too expensive. Cheaper cans can be obtained from Malaysia and

Thailand. However the high import duty(35% on cif) on semi-finished cans discourages that too.

The users are satisfied about the quality in general. Problems which the users have occasionally faced include bursting of cans at the seams, corrosion of the factory-end seam and flaking of the inner coatings. However the supplier seem to respond promptly to customer complaints and has helped them to overcome those.

Two processors who have canning facilities have not done any canning during the last two years. The reasons they gave were the high cost of cans and inability to obtain in smaller quantities. When they pay 50% advance for 10,000 cans and wait for 1 month or longer period the cost of the cans escalate even further due to high interest costs. This leads to another problem in the case of fruits which are seasonal. If the cans are not available during the season which lasts only a few weeks, canning of that fruit may not be economical.

The processors indicated that the single strength Passion Fruit Juice is a profitable product in the export markets, but the major limitation is non availability of A10 cans with double epoxy coating. Local manufacturer cannot manufacture this type of can and is imported from Malaysia. Local Manufacturer has the 1 litre can which is smaller in size to A10 cans.

5.4.6 User's Perceptions of Local Suppliers of Metal Caps and Closures

For jam jars both the lug caps and the 'Omnia' lids are imported from many countries since the locally produced caps are of poor quality. India, Singapore, Malaysia, United Kingdom and South Africa are some of the countries from which these caps are imported. AMICO supplies only the lug caps but Bestrades supply both types.

ROPP caps are supplied by AMICO, Wilton Metal Box and Bestrades but the caps supplied by AMICO is considered to be the best. Bestrades provide the cheapest but their quality and finish seem to lag behind the other two suppliers.

Crown corks are supplied by AMICO and Wilton Metal Box and both provide good quality crown corks. However the PVC lining that is used by these manufacturers cause problems in the case of milk based drinks due to poor integrity of the seal.

5.4.7 Metal Packaging's / AMICO's Perceptions of the Local market

The supplier of metal cans , caps and closures find the local demand for food cans specially from the fruit and vegetable processing sector is very small. They are in a position to cater to local demand even if tnere is a substantial growth. At present

they manufacture cans a few thousands in excess when a large buyer places an order. This is being sold to other users who requires smaller quantities. The economical order quantity for them to change a line is 25,000 cans.

They find the import duty on tin plates, interest rates and other taxes are the major reason for high cost of cans but they are unable to reduce any one of those. They possess modern equipment for producing high quality cans but the local demand is too little. At present food cans are made of 0.20 m.m. pates but they could make 0.16m.m. thick cans if they purchase a rolling unit for making beads to provide the required structural strength.

This company produces all types caps and closures and mentioned when they used 0.16m.m. thick plates for making lug caps for jam jars. However these caps were unsuitable for manual sealing of jars where there is no control on the torque applied. Now they are using a thicker plate (0.20 m.m.) and the problem had been overcome.

They have stopped manufacturing 'Omnia' Lids considering that as a declining product. Crown cork lining has been modernised and use only plastic linings. As a part of their service to their clients they help them with any problems they may have with their seaming machines or closing devices.

6.0 SUMMARY OF CONCLUSIONS

The salient features thrown into focus by the survey are as follows.

6.1 Demand for Glass and Metal Containers

The total current demand for these containers in the fruit and vegetable processing sector is estimated as follows.

Packaging Material	Size or Type	Annual Requirement
Glass Jars "Omnia"	425g.	2,670,588
Glass Jars "Lug Cap"	425g.	2,938,824
Glass Jars	275g.	470,588
Glass Bottles	750m.l.	2,734,118
Glass Bottles	325m.l.	1,938,824
Glass Bottles	190m.l.	1,118,133
Metal Cans	A1	2,533,333
Metal Cans	A2	313,333
Metal Cans	A21/2	206,667
Metal Cans	A10	193,333

On an average the cost of packaging is around 30% for glass jars, bottles and metal cans.

6.2 Metal Cans

Reliability, dependability and the on time delivery of the local supplier are poor, Smaller processors find that the priority is always for export order or for customers who order very large quantities. When they have to order with payments in advance and wait an indefinite period (ranging from six weeks to six months) for delivery the cost becomes prohibitive and the fruit may be out of season and the whole operation in uneconomical.

Only three fruit processors out of 13 interviewed are using metal cans now. Fourth person in the sample is using metal cans for packing liquid coconut milk.

Can prices seem to differ from customer to customer but every one except coconut milk exporter finds the prices high. An example is that the plain A2 can is sold at a price ranging from Rs 11/75 to Rs 14/85 to different customers. Coconut milk exporter buys the plain A1 can at a price which is only 65% of what it costs to other processors.

Quality of metal can are rated as OK in general, but corrosion at the end seams was identified as a frequent problem. Leak at the side seam is a less frequent but a troublesome quality problem. Internal feathering or flaking of the tin coating has

been noticed in some plain cans.

Export of Passion Fruit Juice required double epoxy coated cans of A10 size and those cannot be manufactured by the local manufacturer. Passion fruit is easy to obtain but unavailability of cans restricts the amount that can be processed during the season.

6.3 Glass Jars and Bottles

Major problem pertaining to glass containers is the inconsistency of supply of the local supplier. Because of the Government involvement in this company, they seem to exercise undue power on imports and tariffs. However in the last few months, processors imported containers from many sources and have found cheaper and better quality sources.

Quality of locally manufactured glass jars was rated as O.K. by the majority of users but they complained that is impossible for them to purchase new designs or shapes due to the high costs of moulds as claimed by the glass company. Impurities and weak points which give way when processing are some of the quality problems highlighted.

Processors get very poor service from the supplier and the delivery dates are very uncertain even when the glass company is in normal production. Some processors attributed this to very poor management standards of this company. The glass bottles meant for packing of ready to serve drinks (190 ml.) is never available during the seasonal peak starting from February to April.

6.4 Caps and Closures

Locally made lug/screw caps for jam jars are of poor quality and all users seem to import those caps. Singapore and Malaysia are two countries from those caps are imported.

Crown corks are supplied by two companies now and the quality is good except ones meant for milk based drinks. The special poly vinyl liner used by local manufacturers becomes leaky after closing and lead to dangerous food poisoning problems. The manufacturers use imported Cork liners for those crowns.

ROPP caps are available from three suppliers but the best comes from AMICO Industries. However, non uniform neck sizes of locally made glass bottles is a major problem in obtaining good integrity of seals.

I APPENDIX ONE: QUESTIONNAIRE

QUESTIONNAIRE/DISCUSSION GUIDE: INSTITUTIONAL SURVEY

NAME OF THE INTERVIEWER: DATE:.....

TIME INTERVIEW COMMENCED:
ENDED:

ASK TO SPEAK WITH THE OWNER/ GENERAL MANAGER/ MANAGER OF THE ESTABLISHMENT.

NAME OF THE RESPONDENT: DESIGNATION:

NAME OF THE COMPANY: CONTACT PHONE No.:

ADDRESS: .....

.....

Good morning/afternoon/evening. I am from Survey Research Lanka (Pvt.) Ltd. an independent market research company. We are conducting a survey on the use of packaging materials in food processing companies on behalf of AgEnt, a private sector Agro-Enterprise advice and assistance service. May I ask you some questions. It may take about 30 minutes.

PART A (Qualitative)

1. What are the different packaging materials that you often purchase and use in your business.

   1. .....
   2. .....
   3. .....
   4. .....

2. What are the sources from which you purchase these different packaging materials.

   1. .....
   2. .....
   3. .....
   4. .....

3. What are the problems you encounter in purchasing, use and distribution due to packaging materials? What are the specific problems related to quality, reliability and delivery in the case of each of your sources of supply.

1. .....

2. .....

3. .....

4. What feedback you have received from your buyers/consumers regarding the packaging?

1. .....

2. .....

3. .....

4. .....

(QUANTITATIVE)

5. When you are purchasing packaging materials what materials do you purchase in what sizes and what quantity of each of those sizes and how often do you normally buy?

Packaging Material	Size	Quantity	Frequency
Metal Cans	.....	.....	.....
Glass Bottles (new)	.....	.....	.....
Glass Bottles (Used)	.....	.....	.....
Glass Jars (new)	.....	.....	.....
Glass Jars (Used)	.....	.....	.....
.....	.....	.....	.....
.....	.....	.....	.....
.....	.....	.....	.....

6. What are the applications of each of the above packaging materials in your factory and what is the cost of package as a percentage of total in each of those cases?

Packaging Material	Product	% Pack Cost
Metal Cans	.....	.....
Glass Bottles	.....	.....
Glass Jars	.....	.....
.....	.....	.....
.....	.....	.....
.....	.....	.....
.....	.....	.....
.....	.....	.....

7. Please tell me how you rate each of the above packaging materials in terms of factors given in the table.

Pack Material 1		Very High	High	O.K	Poor	Very Poor
7.1)	Availability	1	2	3	4	5
7.2)	Quality	1	2	3	4	5
7.3)	Cost	1	2	3	4	5
7.4)	.....	1	2	3	4	5
7.5)	.....	1	2	3	4	5

IF THE ANSWERS TO ANY OF THE ABOVE ARE 4 OR 5 ASK FOR REASONS AND RECORD

.....

.....

.....

.....

.....

.....

Pack Material 2		Very High	High	O.K	Poor	Very Poor
7.1)	Availability	1	2	3	4	5
7.2)	Quality	1	2	3	4	5
7.3)	Cost	1	2	3	4	5
7.4)	.....	1	2	3	4	5
7.5)	.....	1	2	3	4	5

IF THE ANSWERS TO ANY OF THE ABOVE ARE 4 OR 5 ASK FOR REASONS AND RECORD

.....

.....

.....

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.....

PART C (CLASSIFICATION PORTION)

8. Could you indicate the products you manufacture?

Jams	1	
Chutney and Pickles	2	
Cordials.....	3	
Sauces	4	
Fruit and milk based ready to serve drinks	5	
Other food products (SPECIFY)	6	....

9. Could you indicate the type of company according to registration?

Partnership	1
Private Limited Liability	2
Public Limited Liability, Unquoted	3
Public Limited Liability, Quoted	4
Sole proprietor	
Other (SPECIFY)	5

10. Could you indicate to what size category you belong to in terms of total no. of employees. (take the no. working at present)?

Equal to or Less than 10	1
More than 10 but equal to or less than 20	2
More than 20 but equal to or less than 50	3
More than 50 less than 100	4
More than 100 (RECORD THE No. .....)	5

11. Could you indicate to what size category you belong to in terms of annual turn over. (take the figure for last financial year)?

(<= Rs. 1 Million)	1
(>Rs. 1 Million, <= Rs. 3 Million)	2
(> Rs. 3 Million, <= Rs. 5 Million) ...	3
(> Rs. 5 Million)	4

THANK THE RESPONDENT AND TERMINATE INTERVIEW.