



Celebrating the 13th Year of the Tamarron Supply Chain Survey!

The 2023 Malt Beverage Supply Chain Performance Survey marks the 13th year of this important benchmark survey! This survey serves to open dialogue between Distributors and Suppliers on crucial Supply Chain issues and opportunities.

- The survey focuses solely on the performance of Supplier Operations/Supply Chain. (All questions pertinent to sales and marketing are included in Tamarron's Malt Beverage Brewer Partnership Compass released in late spring.)
- The survey questions have been written to align with the responsibilities of suppliers as defined by a panel of industry leaders from both tiers and have been validated by the members of the Tamarron Operations Leadership Council.

This survey should be completed by Operations Senior Management

Your candid input is essential! As always, our participating suppliers are awaiting your feedback to measure their progress and find more opportunities to improve their performance with their distributor partners. **Suppliers do not receive individual responses, nor do they know which distributors responded on their behalf.** We strongly encourage you to be fair and honest in your assessment of suppliers.

We hope you will continue the tradition and take the time to fill out this year's survey. For those distributors that fill out the survey, we will send you the top-line results. To be included in the 2023 survey results, we must receive your response by **Wednesday, March 1st, 2023.**

Distributor Business Name:

D.B.A. Name (if applicable):

Distributor Mailing Address:

Street Number

City, State

Zip

Name:

Position:

E-mail Address:

Scan/Email Completed Survey: mikem@tamconsulting.com

Survey Available Electronically: [2023 Tamarron Supply Chain Survey](#)

The following information will be used to compile Respondent Profiles (not shared with suppliers at the individual distributor level)

What was your organization's 2022 annual sales revenue (including malt and all other beverages)?			Your 2022 annual malt beverage volume in C.E.'s:	# Malt Beverage		
<input type="checkbox"/> less than \$25 million	<input type="checkbox"/> between \$25-\$50 million	<input type="checkbox"/> between \$50-\$75 million		Suppliers	Brands	SKUs
<input type="checkbox"/> between \$75-\$150 million	<input type="checkbox"/> between \$150-\$300 million	<input type="checkbox"/> over \$300 million				

In the area of operations/supply chain, how well are the supplier and distributor tiers currently working together? (please check one):

Poor	Fair	Good	Very Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

How would you rate the efficiency of the Malt Beverage Supply Chain (Supplier → Distributor → Retailer)? (please check one):

< 25% Efficient	25%-50% Efficient	50%-75% Efficient	75%-90% Efficient	> 90% Efficient
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

In five years, the overall efficiency of the supply chain between the supplier and distributor tiers will have (please check one):

Improved	Stayed the Same	Declined
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Industry Challenges & Opportunities

What is the biggest challenge facing the beer industry's supply chain (i.e., what keeps you up at night)?

What future change(s) within the Supply Chain do you foresee that will have the **greatest positive impact** on your business?

What does it take for a supplier/brewer to become a preferred supply chain partner?

Best in Class Supplier/Brewer Partner

Please select your best-in-class beer supplier/brewer partner (please circle just one):

Anheuser-Busch InBev	Boston Beer	Constellation
Molson Coors	New Belgium / Bell's	Sierra Nevada
Other:		

Supply Chain Performance & Relationship Grades

1. Based on your experience over the past year, please grade each of your supplier's overall supply chain performance (check one)

ABI	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F
BBC	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F
CBBB	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F
MC	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F
NBB/Bell's	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F
SNB	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F

2. Based on your experience over the past year, please grade the overall relationship you have with each of your supplier's supply chain departments (check one)

ABI	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F
BBC	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F
CBBB	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F
MC	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F
NBB/Bell's	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F
SNB	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F

Overall Relationship / Performance Comments (This is the opportunity to provide commentary or advice on any of your supplier(s)' relationship/ performance grades):

AB InBev (ABI):	Molson Coors (MC):
Boston Beer (BBC):	New Belgium / Bell's (NBB/Bell's):
Constellation Brands Beer Division (CBBB):	Sierra Nevada (SNB):

Please answer the remaining questions based on your honest impressions of each supplier's supply chain performance during the past 12 months. Rate the suppliers you represent on the following scale. Leave blank or cross out those supplier columns that are not applicable to your company. Use "N/A" for questions that are not pertinent to a given supplier.

1 Poor	2 Fair	3 Good	4 Very Good	5 Excellent	N/A Not Applicable
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Please the one most important question from each group of questions

Supply Chain Leadership/ Strategy	<input checked="" type="checkbox"/> most important question	Supplier Rating					
		ABI	BBC	CBBB	MC	NBB/Bell's	SNB
1. Supply Chain Strategy – Communicates a long-term Supply Chain strategy that improves efficiencies for suppliers and distributors	<input type="checkbox"/>						
2. Distributor Engagement on Strategic Supply Chain Decisions – Effectively engages/advises distributors (potentially through distributor Operations councils if applicable) on strategic decisions that will impact [supplier's] supply chain alignment with distributors in the future	<input type="checkbox"/>						
3. Contingency Planning – Has contingency plans in place to mitigate future uncontrollable issues that arise and impact supply chain performance (e.g., fuel pricing, commodity pricing, raw goods availability, driver shortages, etc.)	<input type="checkbox"/>						
4. Progressive Investment in Emerging Technologies – Progressively invests in and uses state-of-the-art and emerging technologies to drive supply chain efficiencies (e.g., artificial intelligence (A.I.), supplier-distributor data integration, emerging transportation technologies, etc.)	<input type="checkbox"/>						
5. Alignment of Supplier Sales & Operations Teams – [Supplier] Sales and Operations teams are aligned on strategic and tactical plans	<input type="checkbox"/>						
6. Culture Alignment with Distributors – Maintains a collaborative culture with distributors and continually looks to implement mutually beneficial supply chain solutions	<input type="checkbox"/>						

7. Sustainability (Planning & Logistics) – Shows commitment to sustainability through efficient planning and logistics practices that reduce emissions and maximize efficiencies	<input type="checkbox"/>						
8. Sustainability (Sustainable Supply Chain) – Has engaged with suppliers and distributors on the topic of sustainability either through survey participation or requests for information pertaining to supplier/distributor sustainability practices	<input type="checkbox"/>						

Please provide commentary/reasoning behind your scores and/or suggestions on how your supplier(s) can improve their performance within **Supply Chain Leadership / Strategy**:

AB InBev (ABI):	Molson Coors (MC):
Boston Beer (BBC):	New Belgium / Bell's (NBB/Bell's):
Constellation Brands Beer Division (CBBB):	Sierra Nevada (SNB):

1 Poor	2 Fair	3 Good	4 Very Good	5 Excellent	N/A Not Applicable
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Please the one most important question from each group of questions

Forecasting / Ordering	<input checked="" type="checkbox"/> most important question	Supplier Rating					
		ABI	BBC	CBBB	MC	NBB/Bell's	SNB
9. Forecasting Collaboration & Communication – Collaborates with distributor to forecast sales and inventory needs and clearly communicates required distributor inventory builds	<input type="checkbox"/>						
10. Fulfillment Accountability to Planned Inventory Levels – Expects a reasonable level of product inventory (days of inventory) and/or case targets and consistently fulfills planned inventory levels	<input type="checkbox"/>						
11. Product Ordering – Provides a simple product ordering system / ordering tool	<input type="checkbox"/>						
12. Production Frequency – All products and packages are produced frequently enough to meet sales needs	<input type="checkbox"/>						
13. Accuracy of Product Shipments – Ensures accuracy of product shipments on orders placed	<input type="checkbox"/>						
14. Adjustments to Orders – Effectively minimizes and communicates adjustments to orders (including changed or cut orders)	<input type="checkbox"/>						
15. Order Flexibility – Allows flexibility for changes to forecasting and ordering	<input type="checkbox"/>						
16. Inventory Management - [Supplier] consistently monitors inventory levels (e.g., daily, weekly) to allow for lower distributor inventory levels	<input type="checkbox"/>						

Please provide commentary/reasoning behind your scores and/or suggestions on how your supplier(s) can improve their performance within **Forecasting / Ordering**:

AB InBev (ABI):	Molson Coors (MC):
Boston Beer (BBC):	New Belgium / Bell's (NBB/Bell's):
Constellation Brands Beer Division (CBBB):	Sierra Nevada (SNB):

1 Poor	2 Fair	3 Good	4 Very Good	5 Excellent	N/A Not Applicable
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Please the one most important question from each group of questions

Innovation & Seasonal Management	<input checked="" type="checkbox"/> most important question	Supplier Rating					
		ABI	BBC	CBBB	MC	NBB/Bell's	SNB
17. Innovation Collaboration – Advises distributor and solicits input on potential impact of supplier planned innovation on distributor operations	<input type="checkbox"/>						
18. Inventory Exit Strategy – Employs a relevant exit strategy to manage inventory on discontinued items	<input type="checkbox"/>						
19. Seasonal Items Inventory Management – Effectively transitions between seasonal programs; manages inventory levels on outgoing items and provides adequate inventory of incoming items, etc.	<input type="checkbox"/>						

Please provide commentary/reasoning behind your scores and/or suggestions on how your supplier(s) can improve their performance within **Innovation & Seasonal Management**:

AB InBev (ABI):	Molson Coors (MC):
Boston Beer (BBC):	New Belgium / Bell's (NBB/Bell's):
Constellation Brands Beer Division (CBBB):	Sierra Nevada (SNB):

Product Freshness / Code Dates	<input checked="" type="checkbox"/> most important question	Supplier Rating					
		ABI	BBC	CBBB	MC	NBB/Bell's	SNB
20. Quality Control Standards – Establishes reasonable quality control standards and procedures (i.e., product handling, out of code, storage requirements, temp, etc.)	<input type="checkbox"/>						
21. Code Dates on Arriving Product – Products arrive with sufficient lead time to sell prior to code date expiration	<input type="checkbox"/>						

Please provide commentary/reasoning behind your scores and/or suggestions on how your supplier(s) can improve their performance within **Product Freshness / Code Dates**:

AB InBev (ABI):	Molson Coors (MC):
Boston Beer (BBC):	New Belgium / Bell's (NBB/Bell's):
Constellation Brands Beer Division (CBBB):	Sierra Nevada (SNB):

1 Poor	2 Fair	3 Good	4 Very Good	5 Excellent	N/A Not Applicable
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Please the one most important question from each group of questions

Transportation Logistics	<input checked="" type="checkbox"/> most important question	Supplier Rating					
		ABI	BBC	CBBB	MC	NBB/Bell's	SNB
22. Order Visibility – Visibility of product shipments en route to distributor	<input type="checkbox"/>						
23. Shipment Arrivals – Timeliness and predictability of shipment arrivals	<input type="checkbox"/>						
24. Transit Time – Length of transit times from supplier facilities to distributor	<input type="checkbox"/>						
25. Quality of Assigned Carriers – Consistency, quality of service, and ease of dealing with supplier assigned carriers	<input type="checkbox"/>						
26. Issues with Assigned Carriers – Cooperates with distributor to resolve issues with supplier assigned carriers	<input type="checkbox"/>						
27. Damage – Minimized product damage upon shipment arrival	<input type="checkbox"/>						
28. Product Stability – Dunnage and load securement are applied adequately to prevent load shifting	<input type="checkbox"/>						
29. Reverse Logistics – Ease of returning cooperage, dunnage, pallets, etc.	<input type="checkbox"/>						
30. Adaptability of Shipments - [Supplier] ability to adapt shipment logistics to adjust to changing supply chain dynamics - e.g., off-scheduled deliveries	<input type="checkbox"/>						

Please provide commentary/reasoning behind your scores and/or suggestions on how your supplier(s) can improve their performance within **Transportation Logistics**:

AB InBev (ABI):	Molson Coors (MC):
Boston Beer (BBC):	New Belgium / Bell's (NBB/Bell's):
Constellation Brands Beer Division (CBBB):	Sierra Nevada (SNB):

1 Poor	2 Fair	3 Good	4 Very Good	5 Excellent	N/A Not Applicable
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Please the one most important question from each group of questions

Package/Pallet Integrity	<input checked="" type="checkbox"/> most important question	Supplier Rating					
		ABI	BBC	CBBB	MC	NBB/Bell's	SNB
31. Overall Package Integrity – Strength and resilience of overall product packaging (in warehouse and on truck)	<input type="checkbox"/>						
32. Mother Cartons – Strength and resilience of mother cartons	<input type="checkbox"/>						
33. Secondary Carriers – Strength and resilience of secondary carriers	<input type="checkbox"/>						
34. Trays – Strength and resilience of package trays	<input type="checkbox"/>						
35. Pallet Integrity – Strength and resilience of physical pallets (wood, plastic, etc.)	<input type="checkbox"/>						
36. Shrink Wrap – Effective application of shrink wrap on pallets of product (i.e., evenly wrapped, stretched to prevent damage, etc.)	<input type="checkbox"/>						

Please provide commentary/reasoning behind your scores and/or suggestions on how your supplier(s) can improve their performance within **Package / Pallet Integrity**:

AB InBev (ABI):	Molson Coors (MC):
Boston Beer (BBC):	New Belgium / Bell's (NBB/Bell's):
Constellation Brands Beer Division (CBBB):	Sierra Nevada (SNB):

1 Poor	2 Fair	3 Good	4 Very Good	5 Excellent	N/A Not Applicable
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Please the one most important question from each group of questions

Product and Package Identification / Handling	<input checked="" type="checkbox"/> most important question	Supplier Rating					
		ABI	BBC	CBBB	MC	NBB/Bell's	SNB
37. Package Handling – Ease of handling individual packages (stacking, loading, delivering)	<input type="checkbox"/>						
38. UPC Codes – Accessibility to UPC codes for scanning	<input type="checkbox"/>						
39. Package Description – All packages are easily identifiable (brand, package size, style, flavor, etc.)	<input type="checkbox"/>						
40. Code Date Legibility – Code dates on all packages are easy to read and understand	<input type="checkbox"/>						
41. Product/Package Repack – Ensures repack material ordering process is simple; materials are consistently available; and the cost is reasonable	<input type="checkbox"/>						

Please provide commentary/reasoning behind your scores and/or suggestions on how your supplier(s) can improve their performance within **Product and Package Identification / Handling**:

AB InBev (ABI):	Molson Coors (MC):
Boston Beer (BBC):	New Belgium / Bell's (NBB/Bell's):
Constellation Brands Beer Division (CBBB):	Sierra Nevada (SNB):

1 Poor	2 Fair	3 Good	4 Very Good	5 Excellent	N/A Not Applicable
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Please the one most important question from each group of questions

Credits	<input checked="" type="checkbox"/> most important question	Supplier Rating					
		ABI	BBC	CBBB	MC	NBB/Bell's	SNB
42. Credits – Provides a simple and timely procedure for applying for credits (including freight breakage)	<input type="checkbox"/>						
43. Accounts Payable– [Supplier] remains current on its supply chain/operations related payments to distributors (<i>not</i> including discounts or other sales & marketing expenses)	<input type="checkbox"/>						

Please provide commentary/reasoning behind your scores and/or suggestions on how your supplier(s) can improve their performance within **Credits**:

AB InBev (ABI):	Molson Coors (MC):
Boston Beer (BBC):	New Belgium / Bell's (NBB/Bell's):
Constellation Brands Beer Division (CBBB):	Sierra Nevada (SNB):

1 Poor	2 Fair	3 Good	4 Very Good	5 Excellent	N/A Not Applicable
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Please the one most important question from each group of questions

Customer Service	<input checked="" type="checkbox"/> most important question	Supplier Rating					
		ABI	BBC	CBBB	MC	NBB/Bell's	SNB
44. Customer Service – Supplier customer service representatives are knowledgeable and responsive	<input type="checkbox"/>						
45. Claims Resolution – Ease of claims resolution procedure	<input type="checkbox"/>						
46. IT Helpdesk – Ease of dealing with supplier IT helpdesk	<input type="checkbox"/>						
47. Supplier Website – Ease of dealing with [supplier's] supply chain website	<input type="checkbox"/>						
48. Response Time – [Supplier] responds to questions or issues in an appropriate length of time	<input type="checkbox"/>						

Please provide commentary/reasoning behind your scores and/or suggestions on how your supplier(s) can improve their performance within **Customer Service**:

AB InBev (ABI):	Molson Coors (MC):
Boston Beer (BBC):	New Belgium / Bell's (NBB/Bell's):
Constellation Brands Beer Division (CBBB):	Sierra Nevada (SNB):

Thank you for participating in the annual Supply Chain Performance Survey! We know that your time is valuable, so we really appreciate you taking the time to complete our survey. As soon as the results are ready, we will email you a link to view the summary results online.