Counterpart profile — how the supplier is likely to negotiate

Four ways the meeting could go, the lead's likely style, and who really shapes the outcome

Excerpt 1 of 6 · NIO full pack · illustrative case: Eschenfeld Nutrition × Quintela Flexibles, flow-pack film LF-210 · situation as at 6 June 2026

NIO reads the counterpart from evidence — the account history, public profiles and Eschenfeld's experience of past rounds — and states every read as a working hypothesis with a confidence level, never as fact. The read becomes practical guidance: how the meeting could unfold and what would signal each path, how the lead negotiator is likely to move, who behind the table sets the limits, and where Eschenfeld's own team is exposed.

> **Quintela trades price only for volume, and has used its resin know-how to deflect every cost argument.** Speak to Rui Teixeira as the person who will recommend the deal internally, ask early who signs, and price the know-how instead of debating it.

Four ways the meeting could go

The likelihoods are our judgement, not measured probabilities. Positional defence is the working hypothesis, with the volume-led play close behind.

What is really going on	Likelihood	What we would see	How we respond
Positional price defender, standing on the know-how	About 35%	Restates "hold" or +10% to +15%; answers any cost point with "our resin is our know-how"	Do not debate cost: ask what the resin adds and offer to price it with a performance warranty; ask for the basis in writing
Volume-led play for 100% of every item	About 30%	"We can hold the price if…"; a fast written proposal	Price first, commitment after; never accept an unpriced lock-in
Cooperative trader	About 25%	Asks what we need; offers options; accepts the index-formula logic	Discovery first, then the packages together
Relay without authority	About 10%	"I need to check"; no movement on any variable	Ask early who decides; keep Rui engaged, since his view still shapes the outcome

Rui Teixeira — likely negotiating style

	Our read — a working hypothesis, confidence 50%
Who he is	Account manager on this account for many years; presents limited authority but, in Jonas's experience, shapes Quintela's position
Style	A relationship-steady account steward who builds rapport deliberately: warm, practical, unhurried. Give him time and context before numbers
How he moves	Small, conditional moves, each matched by a request for volume. No open confrontation or ultimatums in the room
Risk to watch	"Let me see what I can do" used to buy time while his own view sets Quintela's position. Most sensitive to being made to look as if he has misled us

How to engage him. Give him the first few minutes on the relationship and on where both companies are going with recyclable packaging, then move to continuity; a dense table pushed across the desk too early will make him defensive. Treat "I cannot decide" as a position, not a fact. When the know-how comes up, do not argue it: ask what it adds and offer to pay for it openly while it performs better than the alternatives. Under pressure, slow down: Quintela will offer "hold today's price" quickly, and it will feel like progress. Say: *"We would like to find a structure you can defend at Valmora and we can defend at Eschenfeld."* Avoid: *"Your increase has no justification."*

People behind the table

Who	Influence	Before the meeting
Inês Barros, Key Accounts Director	Escalation point; may set Quintela's limits	Ask whether she approves pricing; invite her to round two if needed
Paul Hendry and Tomás Leal, 2024 signatories	Sign the outcome; absent from meetings	Confirm their availability for a later round
Quintela's undisclosed sub-supplier for the recyclable solution	Sets part of the cost; may hold the know-how Quintela claims; a single point of failure	Ask who it is, whether the performance resin is a bought-in grade, and whether it is dual-sourced

Our own side. The read covers Eschenfeld's own team too: over-disclosing the alternatives, eagerness to close and resignation after earlier rounds are the risks to manage.

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Cost evidence — what really moved

The supplier asks for 10% to 15% more; the agreed price formula has already passed its costs through

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Quintela wants 10% to 15% more for the new recyclable film and defends its price with its resin know-how. Before arguing, NIO checks the claim against the price formula both companies signed: what has moved since the last agreed price, by how much, and which reading of the numbers could produce the increase. The answer shapes the whole negotiation — argue from the market rather than from the supplier's costs, and keep today's film a contract question.

> **The agreed index formula already carries Quintela's cost movement, so it cannot be charged twice.** Quintela's +10% to +15% concerns the recyclable film and states no base or date; read against today's price, it is reproduced only by measuring resins from their trough — a wrong base year. Ending the 5% reduction would add about 5%: a contract question, not a cost.

What moved since the last agreed price

€ per 1,000 m before the 5% reduction; € a year at 2025 volume. Index values: ✅ index formula.

Cost element	Index movement, May 2024 → March 2026	Share of price	€ per 1,000 m	€ a year
Polyethylene resin (sealant layer)	€1,674/t → €2,274/t, +35.8%	18.7%	+€27.74	+€60,763
Polyamide resin (film layers)	€2,128/t → €2,592/t, +21.8%	11.6%	+€11.73	+€25,686
Conversion surcharges (Quintela's own database)	Steps applied through the index formula	2.9%	+€5.73	+€12,545
Inflation-indexed layer	German consumer prices +2.76%	35.0%	+€5.60	+€12,265
Energy (year-ahead gas and electricity)	+15.6%	1.5%	+€1.15	+€2,523
Adhesive	+18.0%	1.1%	+€0.94	+€2,068
Inks	+4.3%	0.5%	+€0.12	+€263
Freight to Germany	German transport prices +12.6%	outside the ex-works price	+€0.32	+€701
Total modelled movement	71.3% of the price modelled		**+€53.34**	**+€116,814**

From movement to price. After the 5% reduction, the movement is +€45.18 to +€50.51 on €527.71, a modelled price of €572.89 to €578.22. The price in force moved +€38.83, to €566.54. The €6.35 to €11.69 difference is not explained: re-running the index formula's calculations reproduces the May 2026 step exactly but not the earlier history, so the plan states a range, €566.54 to €578.22, not reconciled ⚠️, until the monthly index-formula workbooks are compared. The difference is not evidence that Quintela is owed anything.

Which readings reproduce +10% to +15%

Reading	Result against €566.54	Reproduces +10% to +15%?
The agreed index formula, from the last agreed price, reduction continuing	+0.00% to +2.06% (not reconciled)	No
Resins from their 2025 lows to their 2026 highs	+12.2% of the price before the reduction, €549.70	Yes — a wrong base year
The 5% reduction ends on 1 July 2026, if today's price includes it	€596.36, +5.26%	No — a contract question, about €65,000 a year

The leak is in the surcharges, not the indices. The index formula has passed falls back as well as rises — €527.71 in July 2024 to €521.24 in July 2025, up to €585.52 in March 2026, back to €566.54 in May 2026. The conversion surcharges, set in Quintela's own database, carry €16.50 per 1,000 m (€36,128 a year) in today's price and can offset a promised decrease. The recent step-ups sit at index months November 2025 (€5.983) and January 2026 (€1.306): €7.289 per 1,000 m, €15,964 a year; Eschenfeld has objected and has not agreed them in writing.

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Sourcing strategy in brief

Kraljic, reverse Kraljic, Porter, PESTEL and SWOT — each read for what it means at the table

Frameworks matter only when they change what happens in the room. NIO reads the film as a strategic item today and turns every lens into a consequence for the negotiation: protect continuity first, use the supplier's interest in the account as the frame, and start qualifying a second source now — qualification time is the force that works most against Eschenfeld.

The sourcing strategy in brief

Lens	Finding	What it means for the negotiation	How sure
Our purchasing position (Kraljic matrix)	**Strategic item:** €1,240,796 a year on one item, and high supply risk — one plant, no alternative for several years, a stoppage unacceptable	Protect continuity first; move the item toward a leverage position by qualifying a second source	Spend confirmed; risk from Jonas's input
How Quintela sees us (supplier preferencing)	**Development account** at group level — about €2.56 million against the revenue of a large international group — but noticeable at Valmora and valuable as the reference for its recyclable design	Quintela has real reasons to keep us; use them as the frame, never as a threat	Our reading of public results
Market forces (Porter's five forces)	Supplier power **high** through qualification time and design control; rivalry among converters **high** in the market but not yet on our specification	The force that works most against us is qualification time — hence two tracks, and a wider field now	Judgement
External environment	**Legal:** the packaging regulation's 2030 requirement forces a new specification. **Economic:** resin prices peaked in January 2026 and are already passed through	The regulation's timing is ours to protect; the resin movement is in the price already	Public sources; index-formula prints
Strengths, weaknesses, opportunities, threats	Our best cards: continuity owed under the agreement, the index formula, the transition clause and the market. Main weaknesses: no qualified alternative, thin remedies, no approved mandate	Argue from the contract and the market; never imply a qualified alternative	Judgement
Lever selection	Continuity first; market comparison instead of cost; the know-how priced openly; volume only with a release; a wider second-source field; the other film item once a competing product qualifies	Every package and every ask is built from these levers	Judgement
Relationship	More than twenty years of supply; today win/lose on the recyclable premium	Aim for win/win: price below today's for term and share, with continuity guaranteed	Jonas's experience

Market forces (Porter's five forces)

Force	Strength	Why
Supplier power	High	The only qualified source; its own recyclable design; the know-how claim; a first right under the transition clause; 100% of the targeted volumes already allocated
Our buying power	Moderate	A 2.19-million-metre account and a supplier that trades price for volume — but no qualified alternative and no approved mandate
Threat of new suppliers on our lines	Low in the decision window	Samples, line tests and a shelf-life test; an alternative could finish in December 2026–February 2027 or in April–June 2027
Substitute formats	Medium, over time	Mono-polyethylene and mono-polypropylene formats; the regulation forces a new specification before 2030
Rivalry among converters	High in the market, low on our specification	At least nine European producers, several quoting up to about 40% below today's price; none qualified

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The second source — a screened shortlist

A single source, but not a thin market: from "no alternative" to seven candidates

No alternative has passed qualification for several years, so today Eschenfeld has no credible threat to leave. NIO separates what is qualified, what is being qualified and what could actually be used inside the decision window — then widens the field: seven candidates drawn from existing quotations, Eschenfeld's own contacts and NIO's market research, each with its reason and next step, and a screening path against Eschenfeld's binding criteria. The message to the supplier changes from an empty threat to a credible one: we are qualifying an alternative for the new film.

The supply position in three lines

Supply	Where it stands on 6 June 2026
Qualified today	Quintela only — one plant, Valmora; no alternative has passed for several years ✅ Jonas
Under qualification	Two suppliers' new samples about early August 2026; preliminary line results about October 2026; shelf-life testing six to eight months — in total or in addition, to confirm
Executable inside the decision window (to 28 February 2027)	Only continued Quintela supply under the agreement. If the samples pass, testing could end in December 2026–February 2027 or in April–June 2027; neither is established

So no threat to leave, no volume shift and no dated switch can rest on an alternative today. What we can say is that we are looking at the market and qualifying an alternative for the new film.

Shortlist and screening path for the recyclable film

🌐 *NIO market research, to be confirmed in the screening.*

Candidate	Why it is on the shortlist	Next step
Harlund Laminates	Quoted €300.42 (second quarter 2025, own specification against our requirements, lower volume); mono-polyethylene laminate range; in testing, sample status to confirm; delivery to Mexico unconfirmed	Refreshed quotation on one specification sheet (July)
Orvetta Films	Quoted €352.00 (second quarter 2025, own specification, lower volume); in testing, sample status to confirm; producing site unconfirmed	As above
Kalden Verpackung	Quoted €380.02 (after the unexplained −€72 adjustment; lower volume); mono-polyethylene flow-pack range; already involved in the project; no public data for applications like ours	As above
Pellato Flexibles	Recyclable barrier film range; already considered by Eschenfeld; all criteria open	Request for information (third quarter)
Merivane Packaging	Recyclable polyethylene film range with a high-barrier variant; found by NIO, not on Eschenfeld's list; fit on our form-fill-seal lines to verify	As above
Tegrion Films	High-barrier laminates; a plant close to our main German site; found by NIO; recyclable mono-material capability still open	As above
Ostavia Pack	Converter approached by Eschenfeld at a trade fair; not followed up then, in favour of stronger leads	As above

Reserve: Brisola Films, Vantor Flex, Corelyn Packaging. **Declined or excluded on Eschenfeld's own list:** Altovia Films, Lumea Pac, Delmare Films, Ternholm Packaging. The scan is a floor: association directories, the Czech and Italian converter clusters and Mexican converters near our Mexico plant are still unsearched.

Screening path. Quotations and information requests on our own requirements, within the agreement's confidentiality clause (Legal confirms what may be shared) → screen against the binding criteria: recyclable mono-material, EU food contact, our form-fill-seal lines in all three countries, barrier and seal performance, 520 mm reels, capacity for about 2.19 million metres a year, delivery to all three sites → samples and line trials for the candidates that pass → shelf-life test.

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Three packages of equal value

Different structures for the supplier, the same worth to Eschenfeld — in every scenario tested

Putting several offers on the table at once only works if Eschenfeld is genuinely indifferent between them. NIO builds three structures that the supplier values differently — a clean market price, more volume for a falling price, or its know-how paid for openly — and shows that their value to Eschenfeld stays within the agreed tolerance in every scenario tested, including the one where no second source ever qualifies.

> **Three packages, three structures, worth the same to us within €3,372 a year.** Each gives Quintela something its own rule values — a clean price, volume kept, or its know-how recognised — while keeping the market's pressure alive until a second source is qualified.

The packages compared

Net value: the yearly saving against buying everything from Quintela at today's price, €566.54, over 36 months from go-live, on stated assumptions ⚠️. The continuity protections sit in every package and are not valued.

	A — market price, open allocation	B — volume for a falling price	C — the know-how priced openly
Recyclable price	€424.00, held for 36 months	€452.00, then €424.00, then €396.00	€396.00 + €40.00 premium (€20.00 from month 25)
What Quintela gets	The award; it keeps 100% until June 2028, as the agreement already provides	100% of every item for 36 months — scope to confirm: wider than the item-only scope Jonas confirmed on 5 June; valued on this item only	Its know-how recognised in the price
What we get	The target price; free to move 30% to a qualified second source after June 2028	€424.00 over three years; a release clause: match within 30 days or 30% released	A performance warranty; the premium ends and 15% moves once a second source qualifies
Net value to us, € a year	**€318,637**	**€315,265**	**€316,147**
Approval needed	A decrease and the term	Jonas's confirmation first; then price path, term and 100% share; Legal on the release clause	Price, premium and share; Legal on the warranty

Are they equal in value? On the central case they are €3,372 a year apart, against a tolerance of €31,527 that Jonas indicated but has not yet confirmed. The set stays within the tolerance in every case tested:

Case	A	B	C	Spread	Tolerance
Central — 35%, second source at €380.02	€318,637	€315,265	€316,147	€3,372	€31,527
No second source by July 2028	€312,174	€312,174	€300,493	€11,681	€30,049
Second source certain	€330,638	€321,005	€345,218	€24,213	€32,101
35%, second source at €300.42	€330,332	€328,185	€321,995	€8,337	€32,200

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Stress test — what decides the plan

Ten findings ranked by their effect on the decisions

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Before the meeting, NIO challenges its own plan. Each finding is tied to the decision it governs and to how well it would stand up to the supplier's answer — so the team knows what to settle first (the 1 July price, because it is the only dated question), what it must not claim (a qualified alternative), and what still needs an approval before any figure is put on the table.

> **The 1 July price leads because it is the only dated question; the missing second source and the missing mandate govern everything else.** Three challenges remain accepted risks, not solved: the walk-away cannot be computed, the deferral depends on leadership, and the €380.00 opening may read as unserious.

What decides the plan — findings ranked by their effect

#	Finding	Decision it governs	Robustness against Quintela's answer
1	**Today's film from 1 July:** the price and the 5%'s continuation are not established; whether €566.54 includes it is not shown. If ignored: up to €596.36, +€65,306 a year	The immediate objective; what may not be traded for "holding" the price; the base of every target	Moderate — the silence cuts both ways; the position rests on Legal's reading
2	**No second source is qualified;** qualification inside the decision window is neither established nor ruled out	The walk-away, the deferral, the timing of the decisive round, what may be said about alternatives	Low — "you have no alternative" is true today; the answer is the programme's progress
3	**No approved mandate;** the base of Jonas's percentages is not stated — measured on a gross €596.36, a 10% saving would be €536.72, not €509.88	Every figure tabled; what may be committed	High — "subject to internal approval" answers it
4	**Continuity protection is thin:** one plant; the plan overdue; remedies capped or excluded; stock cover not reconciled	The first ask; the protections in every package; the response to any supply signal	High for the plan, which is owed; lower for the back-up site and longer notice, which Quintela may price
5	**The transition clause governs the switch;** no written notice has been sent	When and how to send the written price expectation	High — "the process we both signed"
6	**Volume:** Quintela already holds 100% per product group and trades price only for volume; Jonas's volume positions of 1, 5 and 6 June are not reconciled	What volume can be offered; package B; the answer to "hold for 100%"	Low — volume is Quintela's core demand
7	**The 2027 implementation target** has a holder not yet identified, and may move	Whether deferring the award is a real option	Not exposed to Quintela
8	**The "up to 40%" gap is not like-for-like;** Quintela has made no written recyclable offer	The opening and the target rationale	Low to moderate — Quintela will challenge comparability
9	**The baseline:** the intake's "annual" figures were 2026 year to date; the site split is not known	Every € a year figure (up to €63,654 a year at site prices)	Not exposed to Quintela
10	**Surcharges:** the recent step-ups are under objection; the index formula's unusual-cost note sits beside the 3% clause	The secondary aim; the wording of the price-change protection	Moderate — Quintela holds the index-formula data

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