**Purpose of the questionnaire:**

The National Agricultural Marketing Council (NAMC) is currently engaged in a desktop study to determine the factors which have a significant impact on the competitiveness of the Agrochemical value chain. The purpose of this investigation is to identify the factors that affect the competitiveness of the Agrochemical value chain in an effort to: (i) empower industry role players to make better decisions in positioning themselves appropriately, (ii) empower organizations in the industry to improve their service delivery by focusing on those issues which are of greatest importance to the Agrochemical value chain, and (iii) inform policy makers and other directly affected groups of the factors that affect the Agrochemical industry.

The purpose of this questionnaire is to solicit stakeholders’ opinions on the factors that are most likely to influence the level of competitiveness in the Agrochemical value chain. Respondents are also requested to weigh these factors in order of importance in terms of their impact on competitiveness.

Your valued contribution in this regard will be greatly appreciated and will be regarded as a significant contribution to better position the Agrochemical industry, not only in South Africa, but globally.

The questionnaire is structured to gain the relevant information for the Macro-, Micro- and Meso- environments in which the Agrochemical value chain operates. The Macro-environment refers to regulatory and administrative issues, global and local economic trends, including variable factors such as the exchange rate and the political environment. The Micro-environment relates to issues which can be managed by each role player in the industry’s direct business environment. The Meso-environment refers to the supporting functions and services within the value chain.

The questionnaire is designed on the basis of a random, though extensive, consultation process with industry stakeholders. Responses will be aggregated for each group of role players within the Agrochemical value chain to enable the project team to identify the impact of the different factors on the competitiveness of the value chain as a whole, as well as for the different groups of role players within the chain

In this context “competitiveness” is defined as:

*“The ability of your business to maintain, or increase market share in a profitable manner, and in a sustainable way in the long run.”*

All individual responses will be kept highly confidential.

Your participation in this regard is greatly valued and appreciated.

Please complete the questionnaire and forward to christo@namc.co.za and/or corne@namc.co.za on/before **18 April 2019**.

Thank you in advance for your cooperation and valuable time. Your participation is greatly appreciated. We hope to add great value to the industry with this study.

**EXAMPLE ON HOW QUESTIONS SHOULD BE ANSWERED:**

The first part of each question indicates a specific factor and the respondent must indicate whether this factor constrains or enhances the competitiveness of his/her business. This is measured on a scale of 1 to 7 in the block below the question. Each value of the numbers on the scale represents the following:

1 = factor has a serious constraining effect on the competitiveness of the business/industry;

2 = factor has a significant constraining effect on the competitiveness of the business/industry;

3 = factor has a slight constraining effect on the competitiveness of the business/industry;

4 = factor has a neutral effect on the competitiveness of the business/industry;

5 = factor has a slight enhancing effect on the competitiveness of the business/industry;

6 = factor has a significant enhancing effect on the competitiveness of the business/industry;

7 = factor has an extremely enhancing effect on the competitiveness of the business/industry

**Example question: Does the current exchange rate (R/US$):**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
|  |  | **X** |  |  |  |  |

**Information of respondent:**

|  |  |
| --- | --- |
| **Item** | **Information** |
| Title: (E.g. Dr, Mr, Mrs, Ms) |  |
| Name: (E.g. Kevin Stuart) |  |
| Company name:  |  |
| Postal Address: |  |
| Tel: |  |
| Fax: |  |
| Mobile: |  |
| E-mail: |  |

**Please tick one/more groups of role players, or functions, which describes your business and/or operations best:**

|  |  |
| --- | --- |
|  | Input manufacturer |
|  | Distributor |
|  | Agent |
|  | Producer |
|  | Other (please specify) |

**Macro environment**

The impact of regulatory and administrative issues, global and local economic trends, together with chance factors such as the exchange rate and the political environment.

**Note: Please ensure to provide an answer for each question.**

Do the following points constrain or enhance competitiveness of your business/institution?

**1. Does the current exchange rate (R/US$):**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**2. Does the current interest rate/cost of capital:**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**3. Do recent developments in purchase power of consumers/clients:**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**4. Do changes in your input costs (E.g. fuel, labour, electricity and chemicals):**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**5. Do changes in the price of herbicides, pesticides and other chemicals:**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**6. Does the current state of the political climate:**

**(e.g. the political climate has diverse affects that ranges from creating certainty/uncertainty; affecting the efficiency of government institutions; creating specific conditions to enhance/constrain investment, etc. Your answer should reflect the impact of the aforementioned on the competitiveness of your business)**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**7. Does the current cost of crime:**

**(e.g. loss of equipment, disappearance of products/inputs, fraud, etc. that results in financial losses. Your answer should reflect whether the cost of crime affects your business more or less than in the past)**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**8. Does the current state of national infrastructure (e.g. roads, communication, electricity, water):**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**9. Do current labour laws and regulations (e.g. minimum wages, working hours, unions):**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**10. Do the impact of HIV and AIDS on the labour force (i.e. the availability and productivity of labour):**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**11. Do the current municipal by-laws and implementation:**

**(e.g. different municipal by-laws, waste disposal, rates and taxes, building specifications, etc. Your answer should reflect whether these by-laws, as applicable to your business, constrain or enhance the competitiveness of your business)**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**12. Do the current land and water reform processes directly and/or indirectly:**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**13. Does the current agricultural import/export environment:**

**(e.g. import regulations and policy in South Africa may result in lower/higher imports. On the other hand, import regulations and policies in possible export markets may result in lower/higher exports. The procedures and actions to implement such regulations and policies will also affect imports/exports (e.g. administration required). In addition, the exchange rate, availability of product, efficiency of logistics, etc. will affect the import or export environment. Your answer should reflect the combination of all the different factors that impact on the import/export environment)**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**14. Do the current food safety and consumer protection laws and regulations and implementation thereof:**

**(e.g. food safety and consumer protection laws and regulations (i.e. chemical residue levels) could restrict/enhance market access, depending on the ability of the business to comply. It can also bring about or reduce the costs of producing and delivering the product to the market. In addition, it could enhance/damage the consumer/client’s perception of the business. Your answer should reflect the combined impact of these factors on the competitiveness of your business)**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**15. Do the availability and quality of imported inputs to manufacture/produce your product:**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**16. Does the growth of the informal market/trade:**

 **(e.g. products not flowing through the normal mainstream marketing channels to consumers)**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**17. Do the size and growth of the local and export markets**:

**(e.g. (i) the growth in the market is possibly too slack to justify investment in new technology, or too rapid for investment to keep up; (ii) the size of the market constrains/enhances your ability to obtain economies of scale. Your answer should reflect the combined impact of these on the competitiveness** **of your** **business.)**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**18. Do changes in consumer tastes and preferences:**

**(e.g. consumers at all levels are known to have become more sophisticated when it comes to their tastes and preferences. In other words, they demand better information about products, better quality, more convenience and value for money. The speed at which an industry or business is able to respond to these changes will impact its competitiveness. Your answer should reflect the combined impact of these factors on the competitiveness of your business)**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**Weighing the Macro factors:**

The table below includes all the items on which you have just answered questions, i.e. 18 different factors that could potentially affect the competitiveness of your business.

You are now kindly requested to rate these items in terms of their importance. In order to simplify the process please follow the following procedure:

* Choose the 5 (five) most important factors and assign a value of 1 (one) to them in the “Rating” column.
* After the aforementioned has been completed, choose the 5 (five) factors that are the least important and assign a value of 2 (two) to them in the “Rating” column.

|  |  |  |
| --- | --- | --- |
| **No. of items** | **Item to rate** | **Rating** |
| 1 | Impact of the exchange rate |  |
| 2 | Impact of the interest rate/cost of capital |  |
| 3 | Impact of purchasing power of consumers/clients |  |
| 4 | Impact of changes in input costs |  |
| 5 | Impact of the price of herbicide, pesticides and other chemicals |  |
| 6 | Impact of political climate  |  |
| 7 | Impact of the cost of crime |  |
| 8 | Impact of the state of national infrastructure |  |
| 9 | Impact of labour laws and regulations |  |
| 10 | Impact of the state of HIV and AIDS |  |
| 11 | Impact of municipal bylaws |  |
| 12 | Impact of the land and water reform process |  |
| 13 | Impact of the agricultural export/import environment |  |
| 14 | Impact of food safety and consumer protection laws and regulations |  |
| 15 | Impact of the availability and quality of imported inputs |  |
| 16 | Impact of the growth of the informal market/trade  |  |
| 17 | Impact of the size and growth of the local and export markets |  |
| 18 | Impact of changes in consumer tastes and preferences |  |

**Meso environment**

Refers to the supporting industry of the actual value chain. At national level, the supporting industries mostly include business advice and support, quality assurance programmes, training, research, technology development, skills transfer and information provision.

**Note: Please ensure to provide an answer for each question.**

Do the following points constrain or enhance competitiveness of your business/institution?

**1. The general relationship/networks within the Agrochemical value chain:**

**(e.g. loyalty of suppliers/buyers; level of trust/mistrust between transacting parties; arms length relationship and *vice versa*. Your answer should reflect the combined impact of these on the competitiveness of your business)**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**2. Do the current state of research and development in the Agrochemical industry:**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
|  |  |  |  |  |  |  |

**3. Do the current regulations and standards pertaining to your business, as well as the implementation thereof:**

**(e.g. the overall package of standards that your business must comply with to sell agrochemicals directly to downstream buyers; environmental standards/regulations, etc. Your answer should reflect the combined impact of these on the competitiveness of your business)**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**4. Do the current availability and quality of industry information (e.g. weekly and monthly agrochemical production and marketing information) and the dissemination thereof:**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**5. Does the current state of technology (quality, efficiency, availability and cost):**

 **(e.g. machinery used, storage facilities, testing and lab equipment, processing and manufacturing equipment, efficiency of chemicals, new versus old, biotechnology)**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
|  |  |  |  |  |  |  |

**6. Do the nature and activities of industry organizations (CropLife,** **AVCASA, CAIA, etc.):**

 **(e.g. industry organizations provide a wide range of services to their respective constituencies. Your answer should reflect the combined impact of these services on the competitiveness of your business)**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**7. Do the current scope and nature of bio-security management in your industry:**

 **(e.g. disease management, as well as prevention)**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
|  |  |  |  |  |  |  |

**8. Do the current state of training and skills development in the industry:**

 **(e.g. national and internal programs to enhance skills and capacity of technical and management staff, the role of the SETA`s etc.):**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**9. Do the current quality assurance programs and mechanisms:**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**10. Do the current competitive environment in your area of herbicides and pesticides:**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
|  |  |  |  |  |  |  |

**Weighing the Meso factors**

The table below includes all the items on which you have just answered questions, i.e. 10 different factors that could potentially affect the competitiveness of your business.

You are now kindly requested to rate these items in terms of their importance. In order to simplify the process please follow the following procedure:

* Choose the 3 (three) most important factors and assign a value of 1 (one) to them in the “Rating” column.
* After the aforementioned has been completed, choose the 3 (three) factors that are the least important and assign a value of 2 (two) to them in the “Rating” column.

|  |  |  |
| --- | --- | --- |
| **No. of items** | **Item to rate** | **Rating** |
| 1 | The relationships/networks within the agrochemical value chain |  |
| 2 | The state of research and development in the agrochemical industry: |  |
| 3 | Regulations and standards pertaining to your business (e.g. acts, mandatory and voluntary industry standards, as well as implementation thereof) |  |
| 4 | Industry information (production and marketing information) and the transfer thereof |  |
| 5 | Technology in your industry (quality, efficiency, availability and cost of technology) |  |
| 6 | Nature and activities of industry organisations (CropLife, AVCASA, CAIA, etc.): |  |
| 7 | Bio-security management (disease management as well as prevention): |  |
| 8 | Training and skills development in the industry (technical, management, supervisors, programmes to enhance skills and capacity building) |  |
| 9 | The current quality assurance programs and mechanisms |  |
| 10 | Competitive environment in area |  |

**Micro environment**

Relates to issues which can be managed by each role player in the industry’s direct business environment

Note: Please ensure to provide an answer for each question

Do the following points constrain or enhance competitiveness of your business/institution?

**1. Does your ability/conditions for access to sufficient finance/credit:**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
|  |  |  |  |  |  |  |

**2. Does current operational infrastructure in your business:**

**(e.g. state of the art versus outdated machinery/equipment/buildings etc.):**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
|  |  |  |  |  |  |  |

**3. Do current in- and outbound logistics:**

**(e.g. availability of transport, administrative capacity, loading and offloading facilities, scale of logistical operations, etc.)**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**4. Do current supply chain coordination activities:**

**(e.g. consistency and continuity of quality and quantity produced, arrangement of deliveries, “just in time” systems, compliance with contracts):**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**5. Does the compliance cost of traceability and the ability of your business to comply:**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**6. Do current labour availability, productivity and cost:**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**7. Do the quality of inputs used (land, water, chemicals etc.):**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**8. Do the current nature of barriers to entry into your industry:**

 **(e.g. cost of technology, food safety standards, economies of scale, start up costs)**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**9. Does the distance from the market:**

 **(i.e. to buy inputs or sell product)**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**10. Do current business behaviour by down- and upstream role players:**

 **(e.g. procurement policies, monopolistic/oligopolistic behaviour):**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**11. Do current pricing strategies by different role-players within the industry:**

**(e.g. the way that prices are set/negotiated/tendered by downstream or upstream role players)**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
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**12. Does the current level of competition at the different levels in the industry:**

**(e.g. whether there are enough competitors in the industry and whether this leads to healthy competition. Your answer should reflect your specific business environment)**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

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| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
|  |  |  |  |  |  |  |

**13. Do the diversification strategies of your business:**

**(e.g. diversification in this context means whether you sell your product through more than one marketing channel or whether you sell different types of products, etc.):**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
|  |  |  |  |  |  |  |

**14**. **Do the capacity and ability of input suppliers to supply inputs you depend on:**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
|  |  |  |  |  |  |  |

**15. Do the role of distributors as a principal price formation mechanism:**

**(i.e. distributors play a key role in price formation. Your answer should reflect whether this mechanism is sufficient to establish competitive prices in the industry)**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
|  |  |  |  |  |  |  |

**16. Does the current availability of suitable/enough land and water:**

Enhance the competitiveness of your business

Constrain the competitiveness of your business

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
|  |  |  |  |  |  |  |

**Weighing the Micro factors**

The table below includes all the items on which you have just answered questions, i.e. 16 different factors that could potentially affect the competitiveness of your business.

You are now kindly requested to rate these items in terms of their importance. In order to simplify the process please adhere to the following procedure:

* Choose the 5 (five) most important factors and assign a value of 1 (one) to them in the “Rating” column.
* After the aforementioned has been completed, choose the 5 (five) factors that are the least important and assign a value of 2 (two) to them in the “Rating” column.

|  |  |  |
| --- | --- | --- |
| **No. of items** | **Item to rate** | **Rating** |
| 1 | Impact of your ability/conditions to access sufficient finance/credit |  |
| 2 | Impact of the state of operational infrastructure in your business |  |
| 3 | Impact of the state of in- and outbound logistics |  |
| 4 | Impact of supply chain coordination activities |  |
| 5 | Impact of traceability, compliance cost and ability to comply: |  |
| 6 | Impact of the availability, productivity and cost of labour |  |
| 7 | Impact of the quality of inputs used |  |
| 8 | Impact of the nature of barriers to entry into your industry  |  |
| 9 | Impact of distance from the input and output markets  |  |
| 10 | Impact of business behaviour by down- and upstream role players  |  |
| 11 | Impact of pricing strategies by different role players  |  |
| 12 | Impact of the level of competition at the different levels in the industry |  |
| 13 | Impact of diversification strategies of your business |  |
| 14 | Impact of the capacity and ability of input suppliers to supply inputs you depend on |  |
| 15 | Impact of the role of distributors as a principal price formation mechanism |  |
| 16 | Impact of the availability of enough/suitable land and water  |  |

Thank you for affording us your time.

Your valuable inputs are greatly appreciated.

Please send the completed questionnaire to corne@namc.co.za

Should you have any further queries and questions please do not hesitate to contact us at:

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