Investigating factors affecting customer satisfaction in the South African agrochemical manufacturing industry

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Graduation: June 2026

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DEDICATION

To my children, Frans, Janelle and Christian. May you always have opportunities to learn and grow, may you approach new knowledge with curiosity and courage, and may this work remind you that with perseverance and faith, challenging journeys can be completed.

ABSTRACT

The South African agrochemical manufacturing industry is faced with tight planting windows, stringent regulatory requirements, and increasing demands from customers regarding the reliability and the level of service support offered. Internal operational inefficiencies, supply chain challenges and communication breakdowns, albeit detrimental, have a direct influence on the customer interface of the manufacturer. While the industry is characterised by these challenges, very few studies have investigated the problem of operational inefficiencies from the internal customer perspective.

To this end, this study explored and described the perceptions of employees from selected divisions of a South African agrochemical manufacturing company on the internal operational and service-related issues that influence customer satisfaction. A qualitative, descriptive approach was employed in the study, which involved a critical review of the literature and an empirical study comprising individual, semi-structured interviews with a purposefully selected cohort of internal stakeholders involved in the various functions of production planning, supply chain and logistics, export operations, and customer service. The interviews were transcribed verbatim, and thematic analysis was performed on the data.

The results demonstrate that operational reliability, along with the quality of the relationship, affects customer satisfaction. Participants mentioned the need for proactive communication, visible technical and relationship support, structured complaint control, and partnership alignment, as well as the importance of logistics flexibility, predictable lead times, and clear and proactive communication, as well as production planning, inventory visibility, and documentation accuracy. When these elements are insufficient, customers suffer from delays, stock-outs, last-minute changes, worsening changes, and inconsistent information, which deteriorates trust. When these elements are present, customers consider the company as trustworthy, responsive, and easy to work with.

The results of the study indicate that to ensure customer satisfaction in the agrochemical manufacturing context, reliance on internal planning, supply chain and logistics capabilities, communication and after-sales processes, and clear roles and responsibilities, as well as ownership across functions, must be improved. The results of the study, including those aiming to improve operational and service delivery efficiency and customer satisfaction in relation to a similar context.

Keywords: customer satisfaction, agrochemical manufacturing, internal operations, supply chain efficiency, service quality, communication, South Africa, qualitative study

ABBREVIATIONS

ASC - Agrochemical Supply Chains

B2B - Business-to-business

EU - European Union

FMCG - Fast Moving Consumer Goods

CRM - Customer Relationship Marketing

GE - Genetically engineered

IPM - Integrated Pest Management

LSQ - Logistics Service Quality

MRL - Maximum Residue Limit

RASFF - Rapid Alert System for Food and Feed

SADC - Southern African Development Community

SDGs - Sustainable Development Goals

SCV - Supply Chain Visibility

VOC - Voice of the Customer

ZFC - Zimbabwe Fertiliser Company

TABLE OF CONTENTS

DECLARATION ..... **I**

ACKNOWLEDGEMENTS ..... **IV**

DEDICATION ..... **V**

ABSTRACT ..... **VI**

ABBREVIATIONS ..... **VII**

CHAPTER 1: NATURE AND SCOPE OF THE STUDY **1**

1.1 Introduction **1**

1.2 Literature study **2**

1.2.1 Theoretical and conceptual definitions 2

1.2.2 Industry context: The South African agrochemical environment 3

1.2.3 Agrochemical operational functioning 3

1.2.4 Operational inefficiencies and supply chain constraints 4

1.2.5 Customer satisfaction in the agrochemical sector 5

1.2.6 Integrated factors influencing customer satisfaction 5

1.3 Background to the problem **6**

1.4 Research problem **7**

1.5 Research aim and objectives **8**

1.5.1 Research aim 8

1.5.2 Research objectives 8

1.5.2.1 Primary objective 8

1.5.2.2 Secondary objectives 9

1.6 Scope of the study 9

1.7 Research methodology 10

1.7.1 Research approach 10

1.7.2 Research design 10

1.8 The layout of the study 11

CHAPTER 2: LITERATURE REVIEW 12

2.1 Introduction 12

2.2 Global context of the agrochemical industry 15

2.2.1 Conceptual foundations 15

2.2.2 Empirical evidence 15

2.2.3 Contextual application to the South African agrochemical industry 16

2.3 Global agrochemical supply chains: Functioning and inefficiencies 16

2.3.1 Overview of global agrochemical supply chains 16

2.3.2 Operational inefficiencies in agrochemical logistics 17

2.3.3 Inventory visibility challenges 18

2.3.4 Reverse logistics and environmental considerations 19

2.3.5 Summary of key inefficiencies and strategic implications 19

2.4 Regulatory and environmental constraints (global) 20

2.4.1 Global regulatory frameworks and divergence 20

2.4.2 Enforcement disparities and compliance challenges 21

2.4.3 Environmental concerns and ecological risks 21
2.4.4 Impact on trust and trade relations..... 22
2.4.5 Climate change and the need for adaptive regulation 22
2.4.6 Integrating sustainability into regulatory design..... 23
2.5 African and Southern African Development Community (SADC) challenges 23
2.5.1 Weak infrastructure and import dependency..... 23
2.5.2 Regulatory gaps and counterfeit products..... 24
2.5.3 Health and safety concerns 25
2.5.4 Training, awareness, and farmer capacity 25
2.5.5 Regional integration and trade barriers..... 26
2.5.6 Implications for agrochemical supply and customer satisfaction 26
2.6 Market dynamics, manufacturing inefficiencies, import dependency, pricing volatility, and regulatory enforcement issues 27
2.6.1 Manufacturing inefficiencies and industrial structure..... 27
2.6.2 Import dependency and vulnerability 28
2.6.3 Pricing volatility and market pressures..... 28
2.6.4 Regulatory enforcement issues 28
2.6.5 Environmental and social dimensions..... 29
2.6.6 Implications for customer satisfaction in South Africa 29
2.7 Customer satisfaction in the agrochemical industry 30
2.7.1 Definition and core dimensions of customer satisfaction..... 30
2.7.2 Service quality and responsiveness..... 31

2.7.3 Technical support and knowledge transfer 31
2.7.4 Quality management and ISO certification 32
2.7.5 Relationship marketing and loyalty 32
2.7.6 Integrated view of customer satisfaction 33
2.8 Integrated internal factors influencing customer satisfaction 33
2.8.1 Operations performance is the backbone of satisfaction and loyalty. 33
2.8.2 Service quality and loyalty: the direct link 34
2.8.3 What agri-supply chains measure (and why it matters for satisfaction) 34
2.8.4 Availability and distribution capacity in practice (Zimbabwe case study evidence) 34
2.8.5 Communication fit as part of the service bundle 35
2.8.6 What “responsiveness” means inside agrochemical firms 35
2.8.7 Regulatory and quality-compliance frictions (biologicals) and their knock-on effects 36
2.8.8 Integrated implications for the present study 36
2.9 Theoretical gaps and problem alignment 36
2.9.1 Framing the gap emerging from Section 2.8 36
2.9.2 Gap 1: Joint estimation of operational reliability, availability and price perceptions 37
2.9.3 Gap 2: Distributor-centred evidence (versus end-user consumers) 37
2.9.4 Gap 3: Linking satisfaction drivers to behavioural outcomes under real constraints 38
2.9.5 Gap 4: Contextual constraints (finance, coordination, and digital bottlenecks) are acknowledged but under-integrated in models 38

2.9.6 Problem alignment: Why this matters in the South African agrochemical manufacturer–distributor channel 39

2.9.7 Research questions derived from the gaps 39

2.9.8 Proposed contribution and alignment to the study design 40

2.10 Chapter summary 40

CHAPTER 3: RESEARCH METHODOLOGY 42

3.1 Introduction 42

3.2 Research approach 42

3.3 Research philosophy 42

3.4 Researcher positioning: The reflexive stance of the researcher 43

3.5 Research methodology 44

3.5.1 Research design 44

3.5.1.1 Critical literature review 44

3.5.1.2 Empirical study 45

3.6 Population and sampling 45

3.6.1 Population 45

3.6.2 Sampling 45

3.6.3 Recruitment 46

3.7 Data collection procedure 46

3.7.1 Critical literature review 47

3.7.2 Empirical study 47

3.7.2.1 Interview guide and alignment 47

3.7.2.2 Recruitment, information sheet, and consent 47
3.7.2.3 Interview platform, timing, and setting 47
3.7.2.4 Interview procedure and probing 47
3.7.2.5 Recording and transcription 48
3.8 Pilot study 48
3.9 Data management 48
3.10 Data analysis 48
3.11 Reliability and validity 49
3.11.1 Credibility 49
3.11.2 Transferability 49
3.11.3 Dependability 50
3.11.4 Confirmability 50
3.12 Ethical considerations 50
3.12.1 Informed consent and voluntary participation 50
3.12.2 Confidentiality and anonymity 51
3.12.3 Privacy and respect 51
3.12.4 Data security and storage 51
3.12.5 Risk and benefit 51
3.13 Limitations and delimitations 51
3.14 Chapter summary 52

CHAPTER 4: FINDINGS AND INTERPRETATIONS 53
4.1 Introduction 53

4.2 Questions 53

4.2.1 Question 1: In your experience, which internal operational challenges most often impact customer satisfaction? 53

4.2.2 Question 2: How do production planning or scheduling delays influence customer perceptions of reliability? 61

4.2.3 Question 3: What supply chain obstacles have you encountered that lead to customer dissatisfaction? 65

4.2.4 Question 4: How do delivery delays or product unavailability typically affect customers' trust in the company? 68

4.2.5 Question 5: How would you assess the company's effectiveness in communicating product updates or service changes to customers? 72

4.2.6 Question 6: In what way/s could external communication be improved to enhance customer experience? 76

4.2.7 Question 7: How do customers generally respond to the company's handling of complaints/after-sales service? 79

4.2.8 Question 8: What elements of service delivery do you believe are most valued by customers? 84

4.2.9 Question 9: Can you share an example where service-related improvements were made in response to customer feedback? 87

4.2.10 Question 10: What changes would you recommend to improve customer satisfaction across the company? 92

4.3 Chapter summary 96

CHAPTER 5: MAIN FINDINGS, CONCLUSION AND RECOMMENDATIONS 97

5.1 Introduction 97

5.2 Limitations 97

5.3 Achievement of aims and specific objectives 98

5.3.1 Achievement of the research aim 98

5.3.2 Achievement of the primary objective 99

5.3.3 Achievement of the secondary objective 99

5.4 Expectation summary 100

5.5 Recommendations based on the literature 103

5.6 Recommendations based on the empirical findings 104

5.7 Suggestions for further research 105

5.8 Conclusion 106

BIBLIOGRAPHY 107

APPENDIX A: INFORMED CONSENT 119

APPENDIX B: INTERVIEW GUIDE 120

APPENDIX C: LANGUAGE EDITING CERTIFICATE 121

APPENDIX D: QUESTION ANALYSIS 122

ANNEXURE D1 – Question 2 122

ANNEXURE D2 – Question 3 127

ANNEXURE D3 – Question 4 132

ANNEXURE D4 – Question 5 137

ANNEXURE D5 – Question 6 142

ANNEXURE D6 – Question 7 147

ANNEXURE D7 – Question 8 153

ANNEXURE D8 – Question 9 158

ANNEXURE D9 – Question 10 163

ANNEXURE E: TURNITIN REPORT 170

LIST OF TABLES

Table 1: Transcripts to Categories Reduction..... 54

Table 2: Reduction from Categories to Themes (Question 1) 57

Table 3: Reduction from Categories to Themes (Question 2) 61

Table 4: Reduction from Categories to Themes (Question 3) 65

Table 5: Reduction from Categories to Themes (Question 4) 69

Table 6: Reduction from Categories to Themes (Question 5) 73

Table 7: Reduction from Categories to Themes (Question 6) 76

Table 8: Reduction from Categories to Themes (Question 7) 80

Table 9: Reduction from Categories to Themes (Question 8) 84

Table 10: Reduction from Categories to Themes (Question 9) 88

Table 11: Reduction from Categories to Themes (Question 10) 92

Table 12: Conclusions drawn from the Questions..... 101

LIST OF FIGURES

Figure 1: Overview of Chapter 2 structure and section themes..... 14

CHAPTER 1: NATURE AND SCOPE OF THE STUDY

1.1 Introduction

The agrochemical sector is key to the advancement of agriculture due to the major contributions of agrochemicals protect food from pests and diseases, preserve food supply, and bolster the productivity of agricultural crops. A global population of approximately 10 billion people is expected to exist in 2050, leading to an ever-increasing need for agricultural output (Von Bormann, 2019:4). In particular, agricultural economies like South Africa rely predominantly on agrochemicals such as pesticides, fertilisers and herbicides to accomplish needed production levels (Carvalho, 2006:686).

The agrochemical sector is one of the most important in the South African agro sector. It provides support to commercial as well as smallholder farmers. There are challenges in meeting the demands for efficient production and distribution due to regulation, concern for the environment and competition in the market. Meeting customer expectations is a key factor of business success. It leads to the formation of long-lasting relationships, better positioning in the market and compliance with the regulations (Omoruyi & Mafini, 2016:44). Customer satisfaction is also reliant on the services offered, efficiency of the supply chain, and whether the safety and sustainability standards are met, in addition to the effectiveness of the offered products.

Although South African empirical studies have examined customer satisfaction and service quality in related agribusiness settings, evidence that specifically explains how internal operational performance in agrochemical manufacturing translates into customer satisfaction remains limited. This study therefore focuses on internal operational and service-related drivers within a South African agrochemical manufacturer, to clarify where improvements in planning, supply chain execution, and service delivery can strengthen customer satisfaction. South African empirical evidence supports the relevance of investigating customer satisfaction and the operational drivers that shape it within agribusiness and related supply chains. For example, Alsemgeest and Smit (2012) show, in a major South African agricultural business, that customer satisfaction differs across business units and that improvements in weaker units can materially influence overall satisfaction. From a quality and operations perspective, Turner and Ortmann (1999) report that South African agribusiness firms adopt ISO 9000 partly to improve customer service and operational efficiency, with respondents reporting benefits after certification. Complementing this, Turner, Ortmann and Lyne (2000) find that ISO 9000 adoption among South African agribusiness firms is associated with market access orientation and organisational scale, reinforcing the link

between quality management practices, competitiveness, and downstream customer perceptions. Collectively, these South African studies strengthen the justification for the study's focus and contextual relevance. This is one of the most complex and challenging sectors; therefore, understanding customer satisfaction within this industry is lacking. This study aims to fill this void by identifying and describing the customer satisfaction drivers within the agrochemical manufacturing industry in South Africa in order to provide guidance on the potential operational advancements that will improve service delivery and business performance.

From a managerial perspective, the problem context outlined above translates into direct commercial and operational consequences in a time sensitive, compliance driven industry. Tight planting windows, regulatory change, and import dependency amplify the cost of late deliveries, stock outs, or inconsistent communication, because customers carry immediate production risk when inputs arrive late or do not meet requirements (Roberts & Rustomjee, 2009:18; Zikankuba *et al*., 2019:4). In this setting, customer satisfaction is not only shaped by product performance, but by the reliability of internal planning, logistics execution, after sales support, and the quality of communication across the customer interface (Omoruyi & Mafini, 2016:44). These realities make the issue managerially relevant, because many of the drivers of dissatisfaction are controllable through cross functional coordination, clearer ownership of customer facing processes, and improved operational discipline.

1.2 Literature study

1.2.1 Theoretical and conceptual definitions

The core concepts identified in the title "Investigating factors affecting customer satisfaction in the South African agrochemical manufacturing industry" are:

- Factors Affecting: This is to explain the elements or conditions of concern that are within the various departments of the Agrochemical manufacturing company that may be able to impact customer satisfaction, be it positive or negative.
- Customer Satisfaction (Essence of the study): The centre of this study. This relates to and elucidates the level of fulfilment and contentment of the clientele with the products and services offered by the production department of the agrochemical company.
- Relevant departments of the Agrochemical manufacturing company (Population): This is the focus population, and it refers to the support functions of the company that directly impact the standard and timeliness of the outputs.

- South African Agrochemical Company (Setting): This describes the sector in South Africa that the study focuses on and what potential challenges and characteristics this specific sector may have.

These core concepts outline what the study aims to achieve, in this case, trying to understand the extent to which the effectiveness of different departments in a company can lead to satisfaction on the part of customers, particularly in the supply of South African agrochemicals.

1.2.2 Industry context: The South African agrochemical environment

The agrochemical sector is crucial in facilitating global food security, and climate change, as well as increasing population, heightening the demand for improved productivity in agriculture. Fertilisers, herbicides and pesticides, which are agrochemicals, enhance soil fertility, reduce loss of crops, and guarantee constant yields (Nishimoto, 2019:141). South Africa assists both commercial and smallholder farmers in this sector, which is a significant contributor to the food production and export competitiveness of the country.

Nevertheless, South Africa's agrochemicals face stark challenges, including market concentration, the reliance on the importation of raw materials, price instability, and gaps in the enforcement of regulations (Roberts & Rustomjee, 2009:18). While the agrochemicals produced in South Africa must meet stringent safety and environmental protection legislation, the gaps in the enforcement of such legislation also permit the sale of fake and unauthorised products. This results in the loss of public confidence and undermines the results of the crops produced (Devi *et al.*, 2022:399).

The unique combination of pressures from the global market and domestic inefficiencies makes South Africa's agrochemicals particularly susceptible and creates challenges that constrain service delivery, and in the end, impact client satisfaction.

1.2.3 Agrochemical operational functioning

The agrochemical entities interact on a near-daily basis in the operational functioning of the procurement, production, logistics, and customer service delivery. Companies need to integrate these internal operations to meet the competition. This, however, is not the case in South Africa because of the difficulties which exist.

The high importation of raw materials increases the exposure to global market fluctuations and currency instability, increasing operational costs and volatility in the unit costs of production, and the consistency of the output of the manufacturing process (Roberts and Rustomjee, 2009:30). There are also the issues of seasonal production cycles, and rigid distribution systems, which can constrain a company's ability to meet real-time demand in the remote rural agricultural markets.

To stay compliant with new regulations around pesticides, formulators must meet new packaging rules, which in turn affect the timing of new products becoming available. (Zikankuba *et al.*, 2019:4). This has a knock-on effect on order delivery delays and stockouts, which in turn affect consumer trust.

1.2.4 Operational inefficiencies and supply chain constraints

In the South African agrochemical industry, the primary inefficiencies in this industry supply chain are a consequence of system-wide inefficiencies. These are documented in the literature as delays in products becoming approved, disconnected supply chains, and a lack of inventory visibility, which in turn undermine order fulfilment efficiency. (Rajeev *et al.*, 2025:534; Asare & Prempeh, 2016:2).

Additional constraints include:

- Inadequate infrastructure: Delivery times and logistics costs are made worse by the congestion of ports, poor quality roads and extended shipping routes (Swart, 2012:41).
- Regulatory delays: The new or reformulated products' complex registration processes delay the Order-to-Cash cycles immensely (Jaffee *et al.*, 2010:12).
- Internal inefficiencies: Inefficiencies from poorly aligned production planning and scheduling, and delays with the order of raw materials, introduce delays in the system. (Satyana & Soeparno, 2019:109).

These systemic inefficiencies result in increased lead times and inconsistent product availability, both of which have a direct effect on customer satisfaction levels.
For managers, this means that improving customer satisfaction requires prioritising a small set of internal levers, namely demand and production planning alignment, inventory visibility, delivery reliability, and proactive customer communication, because these levers determine whether

customers experience the firm as dependable during narrow planting windows (Omoruyi & Mafini, 2016:46).

1.2.5 Customer satisfaction in the agrochemical sector

The agrochemical sector experiences customer satisfaction from beyond product performance to service dimensions like responsiveness, technical assistance, reliable deliveries, and after-sales service (Omoruyi & Mafini, 2016:46; Wongkijcharoen, 2016:44).

Because of the importance of customer satisfaction, South African agrochemical companies have implemented ISO 9000 quality systems to enhance customer service and satisfaction, reduce potential exposure to legal and regulatory risks, and strengthen customer loyalty (Turner, Ortmann & Lyne, 2000:295). These systems provide traceability and help large-scale agribusinesses mitigate risks, thus valued.

Operational inefficiencies are the primary determinant of lost benefits, such as when farmers face rigid planting schedules. Customers have service failure expectations due to the economic and yield losses incurred when deliveries are late, reducing satisfaction and loyalty.

Service quality is further shaped by:

- Communication practices: Building trust with regular updates, resolving issues proactively, and providing technical guidance (Wongkijcharoen, 2016:31).
- Customer relationship marketing (CRM) systems: Structured techniques allow firms to report better retention and loyalty in the use of customer relationship management.

In a highly concentrated market dominated by multinationals (e.g., Bayer, Syngenta, BASF), local players must use service excellence to differentiate themselves, especially when price competition is constrained by global cost structures (African Centre for Biosafety, 2009:52).

1.2.6 Integrated factors influencing customer satisfaction

From the literature, the following key internal factors have been pegged to customer satisfaction in South Africa’s agrochemical manufacturing sector:

Factor	Impact on Satisfaction
Supply chain efficiency	Timely delivery and reduced stock-outs affect product accessibility and planning certainty.
Regulatory compliance	Delays in product registration and reformulation affect market responsiveness.
Service quality	Responsiveness, after-sales support, and technical assistance improve overall experience.
Communication practices	Proactive, clear communication builds trust and confidence in the supplier.
Operational adaptability	Ability to pivot under market or logistical pressures sustains customer relationships.

In the literature, customer satisfaction in the South African agrochemical sector has been attributed to the country's operational, regulatory and service 'triangle'. Companies have to do much more than offer a good product and/or service, they have to drive the overall service value chain, including the regulatory service, and offer good service. By overcoming internal customer experience challenges, companies can improve satisfaction, engender loyalty, and stand out in a crowded market.

1.3 Background to the problem

The agrochemical industry, like other industries, has diverse, critical challenges that contribute to low levels of customer satisfaction. These have to do with inefficacy in the supply chain, production, regulatory compliance, and competition in the market (Knowledge Center, 2023:10). Limited product availability, high production costs, and poor service levels lead to low levels of customer satisfaction, which ultimately affect agricultural productivity (Mathew, 2023:12).

Supply chains within the agrochemical industry face a multitude of obstacles. The complexity of agrochemical products and the industry-specific regulations and compliance requirements, along with the razor-thin approvals and increased pesticide compliance costs, delays and costs considerably (Zikankuba *et al.,* 2019:4). Also, the world's volatile commodity pricing creates bottlenecks, especially in the distribution and distribution layers (Carvalho, 2006:687). Also, the sector's dependence on imported raw materials creates price and supply chain vulnerability (Roberts & Rustomjee, 2009: 18). Great inefficiencies in the system, along with the high costs

associated with transportation and distribution of commodities, further negatively affect the system.

The South African logistical obstacles, dependence on imports, and high transportation costs only compound the issues (Von Bormann, 2019:12). Not only do these issues cause unpredictable lead times and stock-outs, leaving farmers unable to timely access essential inputs, which further frustrates farmers and reduces their productivity.

Additionally, the consequences of environmental compliance and regulatory requirements impact the industry. Manufacturers must change their production processes as policies regarding pesticide use, chemical ingredients, and sustainable farming practices grow more restrictive (Dorazio-Giardina, 2023). Adjustments to compliance regulations result in delays to the onboarding of new products, increased R&D expenditure, and overall cost increases of operations, which ultimately result in a decline in customer satisfaction.

Service quality is also an important determinant of customer satisfaction. Besides product performance, customers' perceptions are also determined by technical support, after-sales service, communication, and service of the system and problem resolution (Omoruyi & Mafini, 2016:46). Particularly in this industry, where the timely application of products is essential, delivery of services in a consistent and responsive manner is expected to avoid dissatisfaction.
Thanks to these factors, there is very little empirical research regarding the driving forces of consumer satisfaction in the agrochemical manufacturing industry within South Africa. Because the customers within this market have very particular needs, it is pivotal to understand this market and the particular customers in it to create effective operational, supply chain, and customer experience enhancements. This is the knowledge gap this research aims to fulfil, to provide industry stakeholders with the tools to better improve service delivery and market position, and to understand customer satisfaction in the production and supply chain variables of the industry.

The study seeks to improve the business climate and the level of equilibrium between customer dissatisfaction and the operational capabilities, and the growth of the sector to new levels of equilibrium. This will benefit South Africa's agrochemical manufacturing industry by positively impacting the level of sustainability.

1.4 Research problem

Broad problem (industry and organisational context)

The South African agrochemical manufacturing industry operates under tight planting windows, increasing regulatory and compliance complexity, and persistent operational and supply chain constraints. These pressures contribute to production and operational cost inefficiencies, delays in order fulfilment, and variability in service delivery and product availability, which can limit farmers' timely access to agrochemicals and negatively influence agricultural productivity (Mathew, 2023:12; Devi *et al*., 2022:399).

Specific researchable problem (knowledge gap to be investigated)
While these challenges are widely recognised, there is limited South African empirical evidence that explains how internal operational and service-related inefficiencies within an agrochemical manufacturer translate into customer satisfaction outcomes, particularly from the perspective of internal stakeholders responsible for planning, supply chain execution, and customer service. This lack of clarity makes it difficult for managers to identify and prioritise the firm-controllable drivers of dissatisfaction, such as planning alignment, logistics execution, communication efficiency, and problem resolution (Omoruyi & Mafini, 2016:46). Accordingly, the researchable problem addressed in this study is the inadequate understanding of how internal operational and service-related factors, as perceived by employees within a South African agrochemical manufacturing company, influence customer satisfaction.

1.5 Research aim and objectives

1.5.1 Research aim

The objective of this study is to investigate the understanding of employees within certain departments of a South African agrochemical manufacturing company about the internal operational and service-related factors that affect customer satisfaction. This research seeks to determine the impact of operational practices, communication within the supply chain, and the service delivered on customers' satisfaction, and to determine the extent to which opportunities may exist to improve and/or maintain customer loyalty.

1.5.2 Research objectives

1.5.2.1 Primary objective

Primary Objective: To explore and describe, through semi-structured interviews, the perceptions of relevant departments regarding the internal operational and service-related factors that

influence customer satisfaction in the South African agrochemical manufacturing industry (Omoruyi & Mafini, 2016:44; Devi *et al*., 2022:399).

1.5.2.2 Secondary objectives

The secondary objectives of the study are to:
Secondary Objective 1*:* To investigate how internal operational processes influence customer satisfaction.

Secondary Objective 2: To examine the impact of supply chain efficiency on customer expectations and service fulfilment.

Secondary Objective 3: To explore the role of communication and information-sharing in shaping customer perceptions.

Secondary Objective 4: To assess how service delivery and after-sales support affect long-term customer satisfaction and loyalty.

These objectives are rooted in literature highlighting how internal performance, supply constraints, and service interactions significantly shape customer satisfaction in agrochemical contexts (Turner *et al.*, 2000:295; Wongkijcharoen, 2016:44).

1.6 Scope of the study

The purpose of this study is to explore and describe the perceptions of employees of the target departments of a South African agrochemical manufacturing company regarding the internal operational and service-related determinants of customer satisfaction. The study aims to determine the extent to which internal processes such as production, distribution, communication, and service delivery directly influence the quality of customers' satisfaction, using semi-structured interviews as a primary data collection method.

The scope has been confined to internal stakeholder perceptions within a single agrochemical manufacturer in South Africa to maintain contextual depth and relevance. By concentrating on the operational performers and service providers, the study intends to identify practical determinants

to foster a framework to sustain customer satisfaction, streamline internal processes, and manage service delivery in the sector.

1.7 Research methodology

1.7.1 Research approach

What are the perceptions of employees within relevant departments of a South African agrochemical manufacturing company regarding the internal operational and service-related factors, such as technical support, after-sales service, communication efficiency, and problem resolution, that influence customer satisfaction?

This question acknowledges that customers in the agrochemical industry consider products primarily, but satisfaction is also built when customers feel their concerns are heard, and their service requests are completed in a timely manner. As Omoruyi and Mafini (2016:46) put it, service quality and communication are retention factors, and, in agrochemical manufacturing, customers are almost always grounded and in a hurry.

1.7.2 Research design

Research was conducted qualitatively to assess the influence of internal operational and service mechanisms on customer satisfaction in the export division of a South African agrochemical manufacturing firm, with the focus on internal stakeholders in the export operations and customer engagement of the selected Southern African markets.

Participants included regional sales managers, managing directors, key account managers, and export customer service staff who were selected using a non-probability sampling approach, as it is not designed to produce a representative sample of a larger population and is used to recruit information-rich participants. The participants were asked to respond to interview questions, which in the end were conducted using the Microsoft Teams platform, and subsequently provided transcripts of the recordings made during the interview, which they provided before the interview.

Data was examined using the manual thematic analysis method (using colour coding) as suggested by Braun and Clarke, to find operational, communicational, and delivery service patterns regarding customer satisfaction. The trust building was achieved by documenting the

processes and coding transparently, and North-West University's ethics committee was also approached for ethical approval, considering the requirements of POPIA.

Chapter 3 contains the core discussion of the research methodology, the research approach, the research design, the population and sampling, the procedures for data collection, the processes of data analysis, trustworthiness and the ethical elements.

1.8 The layout of the study

This mini dissertation is structured into five sections. In **Chapter 1**, the scope and nature of the research are described. It contains an introduction to the context of the agrochemical manufacturing industry in South Africa, and presents the background to the issue, the research problem and its aim, objectives, scope, and methodology.

Chapter 2 contains the review of related literature. It covers the agrochemical industry at the world and African levels, then focuses on South Africa and addresses customer satisfaction and the internal operational determinants. The Section ends with a description of the gap in the literature and the formulation of the research questions.

Chapter 3 describes the methodology of the research. The chapter includes the research path and structural design, the research population and its sampling, the methods used in the collection of the data, the techniques of data analysis, and the steps taken in validation and authentication of the data, including the ethical handling of the data.

Chapter 4 outlines the findings of the research. The results of the semi-structured interviews are analysed according to the research questions, and the themes are substantiated by the direct quotations of the interviewees.

Chapter 5 is aimed at giving conclusions and suggestions. It contains synopses of important findings according to the objectives of the research and analyses the findings in view of the implications for the case agrochemical manufacturing company and provides detailed suggestions, and discusses the limitations of the research and suggests other potential avenues for research.

CHAPTER 2: LITERATURE REVIEW

2.1 Introduction

This review of the literature is the foundation upon which the study rests, integrating and synthesising prior works, identifying gaps and situating the current study within a particular context in the academic world and industry. In the case of this study, which seeks to understand the factors that affect customer satisfaction in agrochemical manufacturing in South Africa, the literature has to be reviewed from a global perspective on agrochemicals to the particular operational and marketing situational context of South Africa, thus ensuring that the review captures the international context while also dealing with the particular challenges and opportunities of the locality (Vitola-Evele, 2019:34).

A good literature review goes beyond merely recapping previous literature. It also involves an evaluation of the literature and the interrelation of arguments in the literature in order to build an argument of some worth, which is then used to inform the design of the study (Boell & Cecez-Kecmanovic, 2015:162). The literature review provides an opportunity for the researcher to set the study in a theoretical framework, understand the methods that have been employed in previous studies, and identify gaps, contradictions, and biases (Turnbull *et al.*, 2023:4). The review also helps to provide a context for the problem of research in the industry, which is the type of research applicable to business and management and within this context, is the mini dissertation for the MBA (Schryen, 2015:288).

The worldwide agrochemical industry is a key player in modern farming. It helps to improve yields, mitigate losses to pests and diseases, and achieve food security, which is pivotal to the fight against climate change and a growing population. However, Snyder (2019:334) cautions that although findings from global studies are highly relevant, they must be interpreted with caution in emerging markets because there are various contextual elements such as infrastructure capacity, regulatory frameworks, and the resilience of the supply chain. On the same note, Vitola-Evele (2019:52) observes that there is usually a need for modifications of international market strategies to suit developing economies, which are characterised by pricing volatility, inadequate logistics, and underdeveloped market structures.

Unfortunately, our logistics supply chain is also hindered by the same types of inefficiencies. Client perception is also negatively affected by the inefficiencies. Delay in order responsiveness and delivery is crucial for client satisfaction in the agrochemicals industry (Rombach, 2014:73).

This is also the case in the South African agrochemical industry and the South African agrochemical industry, in as much as it is relatively well developed, has an established agricultural industry as well as export opportunities (as indicated in the proposal), is also affected by currency volatility, increased regulatory compliance, and competition in the industry.

Multiple variables influence customer satisfaction in the production of agrochemicals. These variables include the effectiveness of the product, the quality of the technical assistance, the stability of the pricing, and the reliability of the supply. The ISO 9001 quality management system assists in the provision of a systematic methodology for the control and improvement of processes. However, the provision of the service is primarily affected by the interplay of the internal operational variables with the external market conditions (Boell and Cecez-Kecmanovic, 2015:166). As Onwuegbuzie and Frels (2016:32) discuss, qualitative research is best suited for the investigation of these interrelations since they are complex and involve both quantifiable measures of performance and perceptions of the clients.

This chapter is thematically organised as presented in Figure 2.1. Global perspectives and reviews of the agrochemical industry with an emphasis on sustainability and food security are presented in 2.2. Global operational supply chains and their inefficiencies are presented in 2.3, and international regulations along with the environmental frameworks in 2.4. 2.5 focuses on Africa and Southern Africa, and 2.6 presents an in-depth analysis of the agrochemical industry in South Africa. 2.7 attempts to define the concept of customer satisfaction in the industry, while 2.8 discusses the internal operational factors that affect customer satisfaction. Finally, 2.9 states the research gap and aligns it to the problem statement of the study.

By critically reviewing existing literature from both academic and industry sources, this chapter will provide a coherent framework that underpins the methodology and informs the interpretation of findings. It ensures that the study is anchored in recognised theoretical constructs while directly addressing the operational and market realities of the South African agrochemical manufacturing industry.

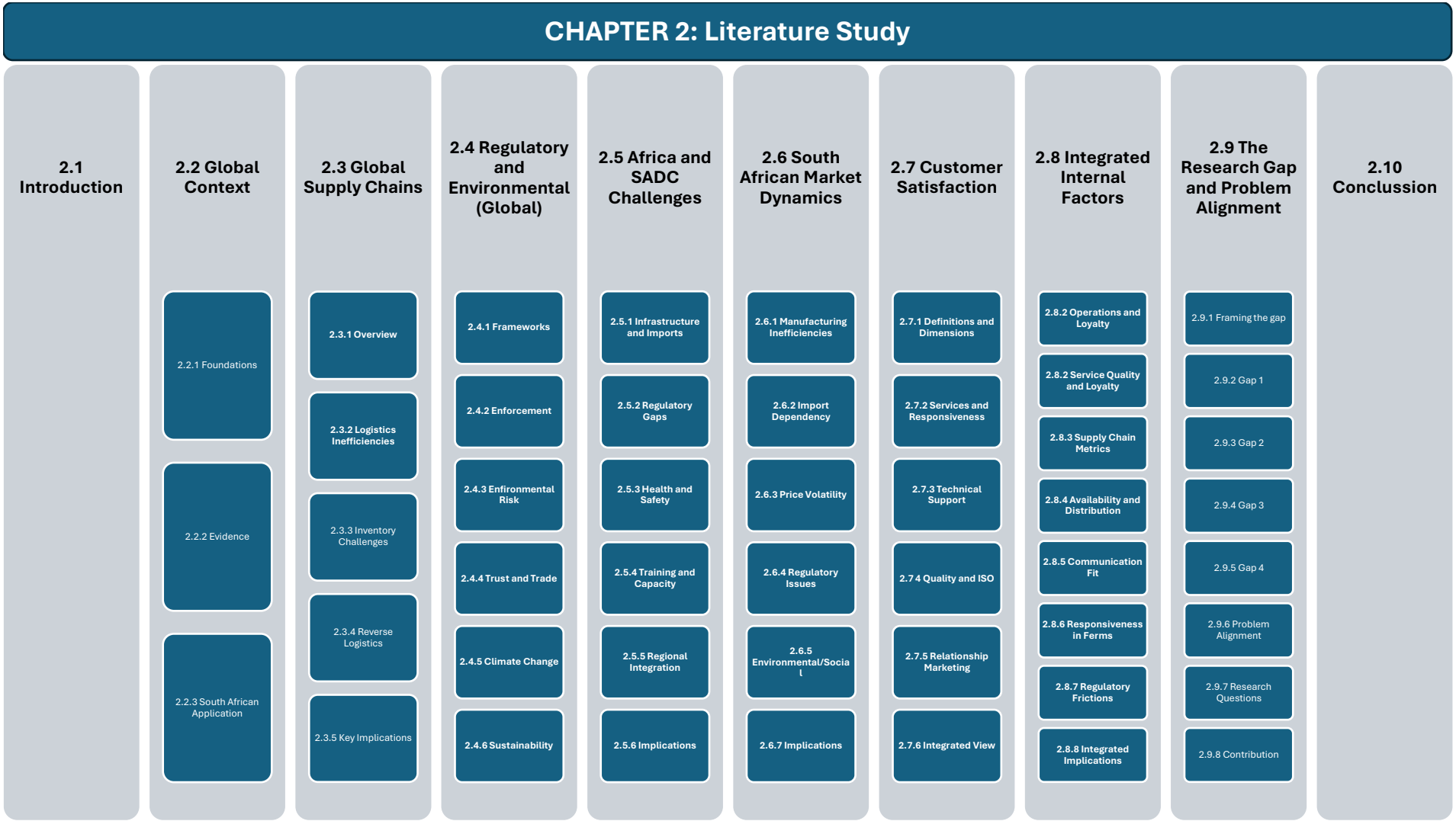

Figure 1: Overview of Chapter 2 structure and section themes

2.2 Global context of the agrochemical industry

2.2.1 Conceptual foundations

A sustainable approach to agriculture encompasses efficiency of production, environmental preservation, and socio-economic viability. The overwhelming reliance on agrochemicals, papers indicate, despite their ability to economically secure food within the short, medium and long term, has generated a number of environmental and public health issues (Devi *et al.,* 2022; Popp *et al.,* 2013). The potential of new plant traits (Ronald, 2011) and of integrated pest management (IPM) to reduce some of the adverse consequences seems to be within reach. Agroecological approaches (Union of Concerned Scientists, 2015) propose shifting to a more radical type of change, in contrast to a simple incremental approach, whereby efficiency of use of resources, ecosystem service benefits and socio-economic synergies are the primary focus. The advent of nanotechnology-based agrochemicals (Gardea-Torresdey, 2021) is another recent advancement that could be utilised to improve the efficiency of inputs and reduce the adverse environmental impacts.

2.2.2 Empirical evidence

Global empirical work consistently shows that pesticides can reduce crop losses and remain economically attractive in intensive agricultural systems (Popp *et al*., 2013; Popp & Hantos, 2011; Sharma *et al*., 2019). At the same time, multiple studies caution that incorrect or excessive use increases pest resistance and contributes to unintended ecological and health consequences, which amplifies scrutiny of agrochemical producers and their value chains (Marchand, 2019; Devi *et al*., 2022). The literature therefore presents a dual reality: agrochemicals support yield protection and food security, yet their legitimacy is increasingly shaped by responsible use, traceability, and stewardship expectations (Devi et al., 2022; Popp et al., 2013). For emerging markets, this tension is heightened by contextual constraints such as logistics capacity and regulatory variability, which can shift customer satisfaction from being primarily product-driven to being strongly influenced by reliability and service support across the supply chain (Snyder, 2019; Vitola-Evele, 2019).

2.2.3 Contextual application to the South African agrochemical industry

In the South African scenario, the agrochemical industry has to perform the dual task of maintaining export competitiveness and ensuring domestic food security. This sector has to comply with South African legislation, while also following international mandates, such as the maximum residue level (MRL) requirements. This sector, however, has to operate under very specific and unique South African local conditions, such as intermittent climatic and resource availability, pest pressures, etc. The integration of biotech, precision agronomy, and IPM has the potential to tackle these challenges. These are not uncommon challenges, and there are reports of success from other countries. Agrochemicals and biopesticides, derived using nanotechnology, could enable the engineering of low-environmental burden and productive agrochemical technologies. For agrochemicals, South Africa, as a producer and a consumer, stands to gain from the adoption of some of the best and most contemporary practices, especially those incorporating a balanced approach of chemical and ecologically sound means. This has to be aligned with the national objectives and South Africa's international trade commitments to resilience and competitiveness.

2.3 Global agrochemical supply chains: Functioning and inefficiencies

2.3.1 Overview of global agrochemical supply chains

The global agrochemical supply chain is one of the most complex supply chains due to the large number of participants across upstream input suppliers and downstream customers, primarily farmers who use agrochemical products. The industry is also highly concentrated, with a small number of multinational companies dominating the market (Ghasemi Naraghi & Jiang, 2024).

These multinational firms manage activities across the supply chain, including upstream manufacturing and downstream distribution. In many markets, they also control a broad portfolio of product categories, such as herbicides and insecticides, which influences supply chain coordination and the way products are positioned and delivered in different regions.

One of the most important characteristics of the agrochemical industry is the long distance between production and consumption. The districts with the highest levels of production, such as China, India, and certain European countries, also have high levels of domestic consumption and therefore have to supply for the export market as well (Xu & Chen, 2024). China has the highest levels of production and also exports agrochemicals. ChemChina and SinoChem are highly

influential on the global supply side and are large state-owned enterprises that control global supply and demand through mergers and acquisitions and by supplying very low-priced generic active ingredients.

The impact of lead firms and key intermediaries, like exporters and regional distributors, is also responsible for defining the relationships, governance, quality, and standards of safety and other delivery parameters across the chain (Lee *et al.,* 2010). Notwithstanding the power imbalances between multinational manufacturers and downstream small-scale actors, in developing countries, local distributors face significant loss of bargaining power and stringent compliance requirements. These governance structures also affect how quickly products flow in the system, and how efficiently this is done, since lead firms influence production volume, and the strategies they choose for brand placement and the registration and regulatory approval processes.
Across the reviewed sources, the global agrochemical supply chain is characterised by high concentration, long physical distances between production and consumption, and dependence on intermediaries that shape governance, compliance, and service expectations (Ghasemi *et al*., 2024; Lee *et al*., 2010; Xu & Chen, 2024). A key implication is that customer experience is not determined only by product performance, but by how effectively these multi-tier structures translate into predictable availability, credible information flows, and responsive problem resolution at the distributor interface. However, much of the literature describes the chain architecture at a macro-level, with less emphasis on how internal coordination and operational handovers inside manufacturers translate into service reliability experienced by customers. This limitation supports the relevance of an internal-operational lens in the South African manufacturing context, where service failures are often felt as breakdowns in planning alignment, documentation accuracy, and communication speed.

2.3.2 Operational inefficiencies in agrochemical logistics

Among the many operational challenges within global Agrochemical Supply Chains (ASC), logistical and transport bottlenecks remain the most problematic. Agriculture production is seasonal (a cyclical process), and this leads to increased demand for crop protection products and consequently, the volume and weight of freight to accrue, which in turn causes significant strain on Transport Networks, Port and Distribution Capacity. (Hardjomidjojo *et al.,* 2022). This is especially problematic in regions where transport and logistical systems are poorly developed, leading to significant inland haulage delays that impact the delivery of transport and protection products. The transport of certain biological products, or formulation products, whose inputs are also perishable, significantly increases the need to improve operational flows within the system,

and this demand is magnified by the need for costly new infrastructure and operational efficiencies within the system.

Certain inefficiencies are exacerbated by regulatory delays. The registration of new active substances or formulations takes different time periods to review across different markets. Some jurisdictions have long review and approval periods (Kimunguyi, 2013). Regulatory differences among countries can lead to duplicate testing and dossier submissions, which increase compliance pain, slower market access, and increase compliance costs (Xu & Chen, 2024). Bureaucratic processes can compromise supply chain continuity in every market where an import permit is needed for each shipment, particularly in particular, for markets during their critical growing periods.

Supply chain efficiency is also impacted by limitations on batch production. Agrochemical production is usually organised in discrete production runs to optimise the use of production equipment, changeover time, and decrease the likelihood of cross-contamination (Ghasemi *et al*., 2024). However, the approach is not particularly flexible in situations where new or unexpected demand is created. If there are no available production lines or if there are long lead times for the needed active ingredients, there is little ability for the production schedule to be altered in a dynamic way.

2.3.3 Inventory visibility challenges

The capacity for accurate and timely visibility of inventory, and the ability to see how much stock is available, is essential to ascertaining that there is product availability and that it is located where and when it is required. In almost all agrochemical supply chains, the lack of integrated real-time data as it pertains to the IT systems and physical stockholding sites results in incorrect inventory (Muhr, 2020). Such inaccuracies lead to poor allocations, overstock in some areas, and stock-outs in other areas.

In export-oriented supply chains where the product is movable, poor inventory visibility is even more problematic, as the product moves through several storage facilities before it reaches the end users. Risks of errors increase with manual documentation and the time it takes to update stock records. In the case of agricultural perishables, prolonged replenishment cycles, and uncoordinated decision-making, the mismatch between actual demand and the available inventory can be amplified (Jiang *et al.*, 2024). Seasonal demand peaks in the agrochemical

industry create the need for prompt and precise inventory control to avoid shortages and eliminate product obsolescence.

The literature links inventory visibility problems to allocation errors, stock-outs, and delayed replenishment, particularly under seasonal peaks and multi-warehouse movements (Muhr, 2020; Jiang *et al*., 2024). Critically, these impacts are not only operational, they are relational: when availability signals and delivery promises are unreliable, customers experience uncertainty and infer a lack of control or accountability in the supplier. While studies emphasise systems integration and data accuracy as technical remedies, fewer authors make explicit how visibility breakdowns interact with internal roles, handovers, and communication routines that determine what customers are told and how quickly issues are resolved. This gap aligns directly with the present study's focus on internal operational and service-related drivers of customer satisfaction within a South African agrochemical manufacturer.

2.3.4 Reverse logistics and environmental considerations

One of the more neglected, yet integral, components of agrochemical supply chains is the reverse logistics of collecting and disposing of used pesticide containers. In Brazil, the Campo Limpo system container recovery and recycling have container recovery and recycling. However, recovery and recycling are supported by strong legislative frameworks and partnerships from the industry (Sato *et al.*, 2006). However, recovery and recycling rates differ across regions, and rural regions have logistical barriers that hinder smallholder participation.

Marsola *et al.* (2021) emphasise that small- and medium-scale producers develop a small-scale logistics planning model based on strategic location and appropriate disposal facilities. In most developing regions, reverse logistics systems continue to foster open burning, burial, or abandonment of containers, which cause harmful effects on ecosystems and human health. These backward practices continue to undermine their sustainability and exacerbate marketing and cost imbalances for producers and distributors.

2.3.5 Summary of key inefficiencies and strategic implications

The interdependence and self-reinforcing characteristics of operational inefficiencies within the global agrochemical supply chains, namely, logistics bottlenecks, incomplete regulations, limited batch production, insufficient visibility, and backward (inadequate) logistics, are apparent. For instance, lack or untimeliness of regulations can deteriorate production planning to a degree that

worsens batch scheduling and imbalances inventory. In the same vein, lack of visibility can mask the logistical challenges, resulting in further delays in strategic logistics planning.

A combination of strategic and operational reactions is required to rectify these inefficiencies. Optimisation of supply chain activities with integrated inventory management systems can improve coordination and provide better visibility in real time. Collaborative forecasting among manufacturers, distributors, and key customers can better alleviate the impact of seasonality on logistics and production planning. Streamlining of regulatory processes is likely to shorten approval delays and fast-track access to the market. Finally, the need for investments in reverse logistics continues to grow, alongside farmer training programs to improve the environmental performance and the overall supply chain resilience.

2.4 Regulatory and environmental constraints (global)

2.4.1 Global regulatory frameworks and divergence

There exists a wide array of regulatory frameworks in the global agrochemical sector, which is a result of the different approaches to risk assessment by each country, their agricultural priorities and political orientation. The ever-elusive global harmonisation, despite attempts at convergence, such as the Codex Alimentarius Commission's MRLs, continues to be a challenge (Smyth, 2017). Codex MRLs are, in a large number of countries, either adopted selectively or, in some cases, even replaced with their own more restrictive standards, which leads to a high level of inconsistency in cross-border trade.

There are stark contrasts when comparing high-income economies to low-income economies. The European Union (EU), for example, has prohibited and/or restricted the use of tricyclazole, carbendazim, thiamethoxam, and acephate, due to adverse effects on people and the environment. Substances like these are still allowed, however, in portions of Asia, Africa, and Latin America, as a result of economic reasons, insufficient alternatives, or dependence on resources that are already in place (Mateen *et al.*, 2022).

Consequently, these countries are faced with certain trade challenges. Countries with weaker controls are more likely to receive Export Notifications issued under the Rapid Alert System for Food and Feed (RASFF). This results in cargo being held, increased testing of samples, and damage to the reputation of the country (Phillips, 2019). These countries are faced with legislation that has no MRLs (Maximum Residue Limits), which requires them to depend on the MRLs of the

country they are exporting to or the less strict Codex guidelines, ultimately leading to a slower clearance of the goods and a heavy compliance burden.

2.4.2 Enforcement disparities and compliance challenges

No system of regulations can be effective without the ability to enforce them. Low to middle-income countries tend to be less placed to cope with advanced monitoring, reporting, and registration systems as found in high-income countries (Phillips, 2019; Smyth, 2017), and tend to be more constrained than high-income countries. These include a lack of laboratories, low numbers of trained personnel, and poor inter-agency coordination (Mansfield *et al.*, 2023).

In certain situations, pesticide control bodies are reliant on donor funding for their inspections, leading to irregular enforcement that aligns with project schedules instead of consistent control (Campos *et al.*, 2022). This scenario is compounded by the lack of knowledge on regulatory necessities among farmers, as small-scale producers often do not know about the harvest intervals, the correct amounts, and the banned substances.

This scenario results in an unequal situation where exporters from developing countries with weaker regulations are more likely to have their cargoes rejected in more developed and stricter markets. On the other hand, there are exporters that have made significant investments in compliance and monitoring and tracking systems, which result in added certification costs that reduce their competitive pricing on a global scale.

2.4.3 Environmental concerns and ecological risks

One of the most debated issues regarding agrochemicals on a global scale is the environment as it relates to the pesticides in use. There are environmental consequences of the persistent and synthetic pesticides that can accumulate in soil and water, disrupt bacterial microflora and biocenosis, and harm other species, especially the pollinators and other aquatic life (Devi *et al.*, 2022). Examples of significant biodiversity loss that have provided incentives for regulatory reform in the EU and parts of North America are the use of neonicotinoid insecticides (Zhang *et al.*, 2024).

Protecting measures have benefited all regions. Dinham (2004) noted that in spite of even having risk-harmful approved chemical regulations, such protective measures still create a cyclical risk

problem in global supply chains where such harmful toxins are lost, reimporting the risk of banned chemicals.

This lost or ignored problem cycle extended the use of agrochemical production and the use of their footprint. The soil becomes less fertile and less productive, while the pest resistance is a problem, worse, and higher input use is required.

2.4.4 Impact on trust and trade relations

The key aspect of confidence in agricultural commodities in trade is the perception of unwavering credibility (in both production and regulatory supervision). Ban and/or restrictions of detected substances in (food) commodities result in the loss of confidence in the affected country's food safety and regulatory system (Smyth, 2017; Zhang *et al.*, 2024), and loss of regulatory confidence will result in enhanced restriction of importation, added pre-export testing to contract trade, and/or loss of contracts for target markets.

Importing countries may institute more stringent inspection measures on agricultural products from specific countries. Eroding trust can have negative trade consequences on relationships. Exporting countries may be perceived as untrustworthy due to a lack of transparency on border regulations. Expanding trade will continue to construct protective barriers (Mansfield *et al.*, 2023).

2.4.5 Climate change and the need for adaptive regulation

Pesticide regulations are simultaneously more complex and needed more than ever as climate change affects the longevity of pests, the geographical areas they can thrive in, and the seasonal periods that impact the effectiveness and frequency of pesticide applications (Devi *et al.*, 2022). A winter with warmer weather may lead to the survival of destructive pests in areas where they previously could not thrive. Furthermore, rainfall that is erratic can have consequences on the frequency of pesticide applications and the rate at which pesticide residue breaks down (Zhang *et al.*, 2024).

However, there is often a gap in concern between regions that would benefit from more flexible regulations. A lag in timely pest control measures is a predictable consequence of long and unchanging national regulations on maximum residue limits. The difference in expectations from a more flexible governing body when compared to the less flexible regulatory system, when coupled with the demands of the farmers, is the crux of the problem.

2.4.6 Integrating sustainability into regulatory design

The importance of sustainability is recognised in the relationship between concern for the environment and the acceptance of risk in the marketplace, and this has led to a greater call for incorporating such principles into the regulatory frameworks for pesticides (Bhandari, 2014). This would include a greater promotion of IPM, the retention of low-toxicity and low-risk formulations, and the gradual withdrawal of high-risk actives, in treaties aligned with the Sustainable Development Goals (SDGs).

Countries that have integrated the frameworks of sustainability into their regulatory processes have also benefited from greater levels of trust from their consumers and from more accessible high-value markets, in addition to lower costs associated with long-term impacts on the environment. These benefits are, however, conditional on high levels of investment in education, and the research of alternative systems of pest control, transparency, and the development of systems for monitoring and reporting.

2.5 African and Southern African Development Community (SADC) challenges

The agricultural systems in Africa and in the Southern African Development Community (SADC) region continue to suffer from deeply rooted problems that affect the performance of the agrochemical sector and shape the level of farmer satisfaction. These problems are multifaceted and include siloed issues of infrastructure, policy, regulation, dependencies on international imports, health and safety, and farmer training. These problems create a situation in which the need for agrochemicals to be adopted is critical for enhancing productivity, yet is also paradoxically the result of systemic weaknesses.

2.5.1 Weak infrastructure and import dependency

Weak infrastructure remains one of the leading challenges to Africa's agricultural competitiveness. Road and transport networks are particularly unpaved and unmaintained in the SADC's rural landlocked areas, where the majority of smallholder farmers are located. There are also logistical challenges in the provision of agrochemicals. Tolera (2020:1609) argues that Africa has a disproportionate burden of pesticide poisonings because the continent has less than 20% of the world's pesticide use and has the most unsafe handling of poisons. Delayed disposals of agrochemicals are also a result of unregulated storage and distribution of agrochemicals. These

are similar to many other studies describing the region's logistics challenges, including the high cost of transport, poor border management, lack of storage, and high agricultural competitiveness, as noted in the region (Vilakazi & Paelo, 2017; Owens *et al.*, 2003).

Reliance on imports further complicates the issue. In most African countries, the domestic production of agrochemicals is very limited, and this has resulted in a heavy dependence on international trade to satisfy the agricultural needs of the countries. Tolera (2020:1608) reports that South Africa, Nigeria, and Ghana together constitute slightly more than half of the agrochemicals imports on the continent. This data shows the extent of Africa's reliance on the global market. Other studies confirm that Sub-Saharan African countries are particularly sensitive to the global spikes in prices of the inputs. For example, disruptions in international trade and logistics due to the COVID-19 global pandemic and the Ukraine war have resulted in a sharp increase in the pricing of other vital pesticides and fertilisers (Sandström *et al.*, 2024).

It has been documented that South Africa, Nigeria, and Ghana are among the most, if not the most, importers of pesticides in the African continent (Mulu *et al.*, 2018; Jean *et al.*, 2018). Such dependency on international trade leaves the African countries susceptible to volatile global pricing and the movement of the logistics of the products, further illustrating the fragility of the Western supply chain to these countries. During such supply crises, if there are currency devaluations or shipping delays, the SADC farmers tend to face extreme price increases or shortages of the inputs, which can reduce their faith in the governments and suppliers' systems. In this light, it is not only the quality of the products that satisfy customers, but the stability and predictability of the supply.

2.5.2 Regulatory gaps and counterfeit products

With how agrochemicals are used and sold, it is a fundamental user-right to ensure Trust from the users. Throughout Africa, the enforcement of current legislation and the management of transparent registration practices are still a long way off. Zikankuba *et al.* (2019:2) indicate that regulatory negligence, compromised and weak institutions, and unilateral enforcement of laws allow for the infiltration of counterfeit and illegal agrochemicals. Farmers are left with products that are worthless and sometimes dangerous. Farmers' trust is lost.

The occurrence of fake agrochemicals in the SADC region has a knock-on effect. Farmers who are unaware of buying low-quality products suffer from poor crop yields, leading to economic losses and growing frustration. Furthermore, even genuine suppliers suffer from losses in the

reputational field, as consumers lose trust in the industry. While Zikankuba *et al.* (2019:3) primarily focus on the dispersed predominance of the registration of pesticides across SADC member states as a basis of illicit perpetrators from the disorder, it could equally be construed to suggest a lack of market efficiency and vulnerability as the root of the erosion of trust from farmers and satisfaction from consumers.

2.5.3 Health and safety concerns

The misuse of agrochemicals, coupled with weak regulations, poses serious threats to the health and environment. Asmare *et al.* (2022:2-3) point out, women who form nearly half of the agricultural labour force in sub-Saharan Africa are the most affected by the pesticides. Their exposure is historically underestimated, as it is often taken for granted that the application of pesticides is a male activity. This is not the case; women take part in numerous agricultural roles such as mixing the chemicals, working in the fields after treatment, washing contaminated clothes, and other activities that expose them to direct and indirect risks.

These consequences may threaten household livelihoods and worsen chronic health problems, as noted by Asmare *et al.* (2022), which in turn elevates costs and diminishes economic output. Farmers' experiences or observations of health issues may also negatively shape their attitude and confidence in the safety and regulation of their agrochemical products, and in turn, diminish their brand loyalty and product trust, even if the agrochemicals are of high quality.

Ultimately, the risks also negatively affect the adoption of modern agricultural inputs by the next generation, which leads to persistent low productivity. In this respect, the limited scope of safety policies and regulations negatively affects health, sustainability, and indirectly customer satisfaction, as they shape the level of confidence in the use of agrochemicals by farmers and contribute to the strong climate of productivity in the region.

2.5.4 Training, awareness, and farmer capacity

Across the African continent, the use of agrochemicals continues to face numerous challenges. These challenges stem from a lack of training and understanding of the techniques of agrochemicals. Tolera (2020:1610) explains that in the top importing countries of pesticides, only a few of the users understand the concepts of instructions and guidelines listed on the labels, and the majority of users do not have basic protective wear for their safety. This scenario leads to a

situation where the proper use of agrochemicals, which enhances the level of risk, is unsafe from a health and environmental perspective.

These insights are particularly relevant from a customer satisfaction perspective. Farmers do not often reach the outcomes they desire with their crops, and lower outcomes in particular are often attributed to the lack of product on the market. It is this unsubstantiated opinion that brings into question the credibility and level of trust in these suppliers, even in a situation where the product is of good quality.

Additionally, insufficient training is associated with more widespread systemic weaknesses within agrochemical regulation. Zikankuba *et al.* (2019:2-3) discuss how regulatory negligence, poor enforcement, and gaps in registration processes not only allow for the circulation of fake products in the market but also create structural voids for farmer training. The confluence of farmer under-education and limited regulation control amplifies the risk and grows the dissatisfaction, which involves both legal and illegal suppliers, as farmers suffer poor results.

2.5.5 Regional integration and trade barriers

Within the SADC region, there are activities which aim to streamline regulations and allow for cross-border trade of agricultural inputs, but these efforts face delays and remain uncoordinated. Zikankuba *et al.* (2019:3) describe how the lack of harmonisation in the registration of pesticides in member states creates trade barriers to legitimate suppliers, causing delays in access to products at reasonable prices. Because of these gaps, there is a tendency for markets to be flooded by fake products.

For farmers, the challenges are twofold as there is a delay in access to reliable inputs and a heightened risk of fake products. This results in dissatisfaction and a lack of trust in the regional governance. Because of the uncoordinated nature of the agrochemical sector within SADC, it will remain fragmented and risk-heavy until there is harmonisation.

2.5.6 Implications for agrochemical supply and customer satisfaction

Challenges regarding the agrochemical markets in Africa and the SADC regions are interconnected and reinforcing. The weak infrastructure and dependency on imports, which drive high costs and increase the risks of delays; the gaps in regulation and counterfeit products, which erode trust; the adoption, which discouraged health and safety concerns; and the ineffective

training of farmers' products. These factors create a situation in which agrochemical products, so critical for productivity, are unable to meet the expectations of farmers on a consistent basis. Solving these issues calls for a multi-faceted approach, incorporating the investment in infrastructure, strengthening the regulations, training of farmers, and harmonisation of policies at the regional level. Absent such measures, the agrochemical industry is unlikely to meet the expectations of its customers. Likewise, the market inefficiencies, production inefficiencies, price volatility, and rigid regulation, which continue to shape the experience of both suppliers and farmers, are explored in the following section. These include the inefficiencies in production, price volatility, and regulatory enforcement. These issues are explored in the following section.

2.6 Market dynamics, manufacturing inefficiencies, import dependency, pricing volatility, and regulatory enforcement issues

Inefficiencies, reliance on imports, and the volatility of the global markets are part of the surrounding industrial and agricultural ecosystem of the agrochemical industry in South Africa and the SADC region. These issues are interconnected and are factors in the overall competitiveness of the sector and the competitiveness of its customers.

2.6.1 Manufacturing inefficiencies and industrial structure

For a number of decades, South Africa's manufacturing base has had issues with competitiveness. According to Kaplan (2003:2-4), the South African manufacturing sector's value-added growth during the 1980s and 1990s was more than 2 to 4 times lower than that of the world and the Southern Africa region. Such a decline resulted in a weakening of the country's position and capacity to compete with other countries on a global level. This is the case in the agrochemical industry, where the impacts of such underperformance result in elevated production costs, less innovation, and a lower level of resiliency to external shocks.

Newman *et al.* (2019:3-5) point out additional evidence of inefficiency with their observation that the incorrectly distributed labour and capital across South African manufacturing firms results in an undermined productivity. These inefficiencies mean that firms do not exploit economies of scale fully and do not stratify their resource allocation optimally. With respect to agrochemicals, this inefficiency results in supply bottlenecks, high and erratic product availability and prices, which ultimately affect customer satisfaction.

2.6.2 Import dependency and vulnerability

There have been attempts to bolster local industries; however, South Africa continues to be predominantly dependent on imported agricultural inputs, especially fertilisers and chemical intermediates. Ottermann *et al.* (2025:2-3) point out that the fertiliser industry imports from Saudi Arabia and Qatar, which exposes South African farmers to volatile international prices and supply chain disruptions. This dependence on imports not only increases costs but also increases the risks of domestic shortages due to global crises and shipping delays.

Amelekwork *et al.* (2021:1-2) discuss the issue of dependence on imports and highlight the case of South Africa, which is importing over 66 000 tons of starch, of which close to 33% is cassava starch. The lack of an ability to supply the aforementioned demand showcases how dependence hampers local industries from fostering strong value chains. The agrochemical industry is just as vulnerable, and customers have an unquenchable appetite for supply and demand when it comes to the local economy.

2.6.3 Pricing volatility and market pressures

The uncertainty pertaining to the price of inputs is the primary driver of predicaments for agrochemicals manufacturers and end-users. Majozi and Veldhuizen (2015:46-47) indicate that South Africa’s chemical industry, which has a history of coal to liquid technology, has been and is still exposed to the whims of the international oil price Majozi and Veldhuizen (2015:46-47) indicate that South Africa’s chemical industry, which has a history of coal to liquid technology, has been and is still exposed to the whims of the international oil price. The changes will trickle down to the price of the fertilisers and pesticides. For farmers, the price of inputs that are essential, and the price suddenly changes, their trust in the supplier is, more often than not, eroded.

The underperformance of the manufacturing sector, as noted by Kaplan (2003:3), has resulted in the South African companies being unable to mitigate these pressures through price-competitive exports. Therefore, local customers are more vulnerable to price changes, which impact profitability, and their product's perceived value and supply credibility.

2.6.4 Regulatory enforcement issues

Disparities regarding the enforcement of regulations make issues even more complex in the agrochemical sector. Mawcha *et al.* (2025:2-3) explain the delays in regulatory harmonisation

regarding the laws of the Southern African countries. Regulatory inconsistencies lead to product approval delays, uncertainty, and the introduction of innovative, in-market and safer products to the local market.

The social impacts of the ineffectiveness of the regulation of conventional pesticides have also been quite serious. Davies *et al.* (2023:2-3) cite the deaths of children and young people due to exposure to unregulated "street pesticides" in Cape Town. The continued availability of these serious and unregulated products in the market ignores the critical need for market surveillance and enforcement. The weak enforcement of regulations and the unavailability of safe products also lead to a loss of confidence in the formal agrochemical industry. The loss of confidence is a direct result of the weak enforcement of regulations and the loss of products that can be safely used.

2.6.5 Environmental and social dimensions

The market elements are also closely linked to the social and environmental elements. Dabrowski *et al.* (2015:1-2) developed maps of the distribution of pesticides in South Africa, showing the ecological and social areas of high vulnerability. This illustrates the high social costs associated with the intensive use of agrochemicals. This illustrates the potential of the intensive use of agro-chemicals to create serious public concern and reputational risk to agro-chemical suppliers.

Concurrently, other perspectives are developing. Wynberg (2024:25-27) discusses the emergence of farmer-led and agroecological practices that are challenging the dominance of industrial agrochemical inputs. These practices, while not mainstream as of now, are a developing pressure point, as farmers and policymakers turn to sustainable and place-based practices.

2.6.6 Implications for customer satisfaction in South Africa

The agrochemical industry in South Africa and the rest of the SADC region is burdened with systemic inefficiencies, import dependency, and volatile pricing, as well as uncoordinated and inconsistent governance. Overall, inadequate manufacturing and unequal distribution of resources are the biggest constraints to competitiveness (Kaplan, 2003; Newman *et al.*, 2019). Import dependency places both producers and farmers at the mercy of international shocks (Ottermann *et al.,* 2025; Amelework *et al.,* 2021). Reductions in farmer confidence are a direct result of price fluctuations, uncompetitive industry settings and oil price volatility (Majozi & Veldhuizen, 2015). Various regulations from slow biopesticide approvals to illegal markets for

unregistered pesticides comprise the trust and safety gaps (Mawcha *et al.,* 2025; Davies *et al.,* 2023). Finally, greenhouse gas emissions, environmental degradation, increasing pressure from agroecological practices, and unregulated Environmental flows are redefining the expectations of the sector (Dabrowski *et al.,* 2015; Wynberg 2024).

The interconnected relationships explained above demonstrate how product performance is only part of the equation that affects customer satisfaction. There are also systemic, economic, and social factors at play. This naturally leads into section 2.7, which studies customer satisfaction in the agrochemical industry and how quality management systems, technical service, and delivery responsiveness respectively mitigate and aggravate the problems set out above.

2.7 Customer satisfaction in the agrochemical industry

Customer satisfaction in the agrochemical industry is a complex phenomenon based on a combination of factors, including product quality, delivery of services, technical assistance, adherence to regulatory requirements, and the longitudinal ties that exist between suppliers and distributors. Within the agricultural setting, satisfaction also includes the direct contribution of the products and services offered to enhance the productivity and profitability of the farming enterprise.

2.7.1 Definition and core dimensions of customer satisfaction

Customer satisfaction is best described as the perceived lack of expectation. Satisfaction occurs when there is a positive alignment of expectation and supply chain efficiency. This is particularly true for reliable and timely supply chains in the agricultural industry. This means product supply and technical complaint management responsiveness in the agrochemical markets.

In the context of the agricultural e-commerce supply chain, Wu (2020:1-3) found that consumers were more satisfied as a result of effective communication, transparency, and timeliness. Although e-commerce is not the same as traditional agrochemical distribution, it emphasises the importance of information flow and responsiveness. This applies to farmers and dealers in South Africa.

2.7.2 Service quality and responsiveness

Service quality is frequently conceptualised using the SERVQUAL model, which explains quality as the gap between customers' expectations of a service and their perceptions of the service actually received (Parasuraman *et al*., 1985; Parasuraman *et al*., , 1988). SERVQUAL is widely used as a diagnostic lens for understanding which elements of service delivery shape satisfaction and relationship outcomes, particularly where reliability and responsiveness influence trust in the supplier. Although SERVQUAL is often operationalised through five broad dimensions (tangibles, reliability, responsiveness, assurance and empathy), this study uses the model only as a high-level framing device to reinforce why service-related factors such as responsiveness, communication quality and support reliability are consistently linked to customer satisfaction in supplier–customer relationships (Parasuraman, Zeithaml & Berry, 1988).
Research in the pesticide industry demonstrates the importance of customer service quality. Ethiopian agro-dealers, for example, were most satisfied when companies provided knowledge and courtesy, communicated in simple language, and provided marketable pack sizes (Mutulu, 2011:23-25). Other important service quality aspects were product promptness and avoidance of delays in order to build trust and enhance long-term relationships.

This corresponds with other findings in the literature surrounding the service. Jamo (2014:1-3), in his study on the bottom-up agricultural service provision in Nigeria, found that performance is not only measured through the provision of inputs such as fertilisers but also through the provision of timely and equitable distribution. In the same manner, Bishwakarma *et al.* (2022:2-3) stress that farmers specifically derive satisfaction from the responsiveness of local government, competence of the staff, and inclusion in the decision-making processes in the provision of agricultural services. All these works of literature prove that in the agricultural supply chain, responsiveness is a determinant of satisfaction.

2.7.3 Technical support and knowledge transfer

In the agrochemical industry, the satisfaction of the clients is hinged on the provision of technical services. Mutulu (2011:31) states that agro-dealers appreciated the technical advice and the frequent staff visits, and these factors built trust and confidence in the products they supplied. Given that farmers depend on intermediaries for product knowledge, having frequent after-sales service support increases the perceived value of the product greatly.

Irungu (2018:35-37) states that the incorporation of some marketing and technical training as an innovative approach also improves the firm's performance and indirectly satisfaction. In a market that is characterised by intense competition, firms that opt for product and process innovations are able to distinguish themselves. They also give their clients assurance that they have the most relevant and effective solutions.

2.7.4 Quality management and ISO certification

Satisfaction from consumers is also influenced on the satisfaction from consumers is also influenced on the assurance gained from the quality assurance framework. Dimitropoulos and Vlachos (2014:2-3) describe the impact of consistency and reliability in cooperative embedded agriculture after implementing the ISO 9000 Quality Management Systems. Agrochemical companies can enhance the reliability of their brand, reduce defect rates, and demonstrate professionalism by compliance with quality management practices, and such professionalism is the basis of customer trust.

In the same way, Ulman *et al.* (2013:1-2) in their studies have pointed out that in agriculture, services have an ISO-based evaluative model which ensures that quality is evaluated in a systematic way and that there is an alignment of the organisational performance with the targeted customer. This is an indication that certification is more than a compliance requirement and is really an important way of sustaining satisfaction in the agrochemical markets.

2.7.5 Relationship marketing and loyalty

The long-term satisfaction is also a result of the relational factors. Rangani *et al.* (2019:356-357) in the Sri Lankan agrochemical Business-to-business (B2B) sector, highlighted that perceived value, economic, emotional, and social, has a direct impact on satisfaction and loyalty. Reportedly, satisfaction levels were higher when the manufacturers acknowledged their partnership role as opposed to viewing them as mere intermediaries. In loyalty, emotional value, such as feeling supported and respected, complemented the economic value.

Muriungi (2018:43-45) demonstrates how CRM processes affect organisational performance in the crop protection industry in Kenya. CRM generates loyalty and trust from clients, which consequently improves satisfaction and retention of client revenue over a long duration.

2.7.6 Integrated view of customer satisfaction

Service responsiveness, technical support, quality management and relational strategies integrated together shape customer satisfaction in the agrochemical industry. Farmers and dealers across Africa and Asia appreciate reliable and quality products; however, a supportive service ecosystem matters too. Product innovation, quality management based on ISO, and support services like prompt delivery, technical visits, and effective complaint handling (Mutulu, 2011; Jamo, 2014; Bishwakarma *et al.*, 2022) are significant (Irungu, 2018; Dimitropoulos & Vlachos, 2014; Ulman *et al.*, 2013). Customer loyalty and long-term satisfaction are also significantly affected by relationship marketing (Rangani *et al.*, 2019; Muriungi, 2018).

Thus, agrochemical satisfaction is more than transactional interactions. It is a holistic construct comprising product quality, service quality and relational trust. This leads to section 2.8, which is about integrated internal factors that shape satisfaction, such as operational and service delivery systems, and regulatory frameworks that influence these customer-facing outcomes.

2.8 Integrated internal factors influencing customer satisfaction

2.8.1 Operations performance is the backbone of satisfaction and loyalty.

While reviewing the literature of industrial services, one of the overarching themes is the impact on dependent and the customers' loyalty resulting from the operational performance. Some data show that the perception of service and loyalty is damaged by long wait times, but on the other hand, loyalty is maintained by dependably delivered service (Kumar *et al.*, 2011:161).

It is crucial to underscore that operational components do not function in a vacuum: the interdependence of processes means that shortcomings in one dimension (e.g., the service that fails to arrive in the first promised window) snowball into others, degrading the overall perceived quality, and eliciting longer lead times than are quoted. Path modelling shows that as dependability suffers, so does perceived quality and the average lead time quoted increases, and this is the precise reality that managers need to balance as demand hits a peak or capacity is stretched (Kumar *et al.*, 2011:166).

In this context, satisfaction initiatives that fail to meet the first promise made, on-time delivery and order accuracy, are not likely to provide value. In other words, dependability is not merely a "nice

to have," but is a foundational aspect of determining the customers' quality judgment and the way in which they interact in the channel (Kumar *et al.*, 2011:166).

2.8.2 Service quality and loyalty: the direct link

The influence of service quality on customer loyalty has been documented in marketing studies outside of operations. Overall, studies have found and are able to conclude that a customer is more loyal to a firm with a higher service quality, and this has been found to hold true in a variety of industries and competitive conditions, thus highlighting that a customer is loyal to a firm because they receive quality, reliable, and consistent services. (Budianto, 2019:299)

To make a more specific statement, the same article views loyalty as a consequence pertaining to the consistency of services and the quality of services, which correlates with previous findings: quality is signalled to customers through timely, responsive, and flawless service delivery (Budianto, 2019:300).

2.8.3 What agri-supply chains measure (and why it matters for satisfaction)

The performance measurement framework within agribusiness makes it clear that the areas of measurement which should receive the most attention are the measurement of responsiveness (fill rate, customer response time, lead time), measurement of error rates (shipping errors), and customer complaints, because there is a direct link between the areas and customer satisfaction (Dera, 2020:13).

These frameworks also capture quality as both product and process quality: product safety and health, sensory properties and shelf life, as well as product reliability and convenience, all of which affect how customers perceive supplier performance during time-critical seasons (Dera, 2020:13). For an agrochemical manufacturer working through distributors, this means that fill rate, on-time performance and complaints management are not only operational KPIs but also drivers of perceived value (Dera, 2020:13).

2.8.4 Availability and distribution capacity in practice (Zimbabwe case study evidence)

At the country level, evidence indicates the extent to which firms attempt to engineer availability. Zimbabwe Fertiliser Company Limited (ZFC Ltd) is reported to be the largest local fertiliser manufacturer and is also a major agrochemical distributor. ZFC is expanding access by local

production (two granulating plants) and, along with regional cropping needs, imports, and formulations, constructed a distribution architecture to stabilise a supply (Dera, 2020:18).

Demand-wise, the channel is saturated by a mix of agro-dealers, stockists, NGOs, and farmers, which opens up inventory risk and last mile service, but also enhances the impact of demand errors and delays on the end markets (Dera, 2020:17). This means that depot and stockist coverage, along with order accuracy, are the concrete levers to which availability is felt by the customers (Dera, 2020:18, 37).

2.8.5 Communication fit as part of the service bundle

In the agricultural sector, the preferred communication channels differ by age, segment, and distance. The relationship between preferred contact method and these factors is statistically significant, with younger and more distant customers tending to use electronic means (phone, email) rather than in-person contact or postal mail. (Branco, 2020:3).

Within the context of providing seamless merchant services, this means that the seamless integration of communication channels to customer profiles is not merely cosmetic, but rather commands the positive effects of perceived responsiveness and ease of the firm's service, supplementing the ease of service logistics of the firm at critical order intervals. In essence, communication with the different market segments is not merely an afterthought, but part of the core design of the operating model (Branco, 2020:2-8).

2.8.6 What "responsiveness" means inside agrochemical firms

In the context of agrochemicals, the firm's operational responsiveness is defined as the firm's ability to respond to customer requests and complaints within the time frames that question the event's relevance, and purposefully respond to critical events or threats. This ability to respond with the event time-lined is the essence of real-time corrective action, efficiency, and risk contraction in a seasonally bound market where delays accrue (Simiyu & Kori, 2023:132).

In terms of these execution recommendations, the emphasis is on the realignment of resources to the market demands at a lower bound of cost, emphasising market research and customer satisfaction through adequately skilled human capital and efficient technology. The real emphasis is that performance outcomes are a reflection of the reliability of the customer-facing component of the strategy (Simiyu & Kori, 2023:140).

2.8.7 Regulatory and quality-compliance frictions (biologicals) and their knock-on effects

With respect to biofertilisers and biopesticides, regulation and licensing also entail additional layers of friction and time costs, which ultimately affect verification and certification market access and confidence. There are indications of how registered quality oversight and microbial product business registrations constrain the environment and, by extension, availability (Arjjumend & Koutouki, 2020:82-83).

In addition, separate registrations, jurisdictional, and inspections and quality reviews under specific Acts are regulatory compliance frictions that result, which, in the years to come, will ultimately affect customer satisfaction (Arjjumend & Koutouki, 2020:95-98).

2.8.8 Integrated implications for the present study

Bringing these strands together, the prior work suggests a coherent mechanism for industrial, agri-oriented channels: (i) dependability (arrival on first promise, on-time) and waiting/lead time management shape satisfaction and loyalty; (ii) service quality rises and falls with consistent execution; (iii) responsiveness and error control (fill rate, shipping errors, complaints handling) are both measured and managerially manipulable levers; (iv) distribution architecture (depots, stockists, local production/imports) determines how availability is experienced; (v) communication fit enhances perceived responsiveness; and (vi) regulatory friction in biologicals affects availability and perceived reliability. For a South African agrochemical manufacturer working through distributors, these points point to a multi-lever operating model: protect dependability and lead time, design for availability, match communication channels to segment needs, and anticipate regulatory lead times, then layer pricing/relationship tactics on top (Kumar *et al.*, 2011:161,166; Budianto, 2019:299,300; Dera, 2020:13,18,37; Branco, 2020:3; Simiyu & Kori, 2023:132,140; Arjjumend & Koutouki, 2020:82-83,95-98).

2.9 Theoretical gaps and problem alignment

2.9.1 Framing the gap emerging from Section 2.8

Section 2.8 stated the factors that affect customer satisfaction in the agri-industrial channels and includes the complexities of the logistics, lead times and error management, the prevailing market and pricing conditions, and the customer execution. However, empirical modelling in the region's

literature does not capture these levers together at the channel (distributor) level. In the smallholder market in Kenya, availability is a rated factor in the choice of the agrochemical. In the context of South Africa's cereals and some other work, market price and cost/supply of inputs dominate the investment behaviour. And from the other marketing work, satisfaction, trust and service-quality constructs have been confirmed as central. However, these components are very much taken in isolation from each other instead of as a coordinated system of drivers of B2B distributor satisfaction (Nyadieka, 2023:45-46,57; Dube *et al.*, 2020:2; Deng, 2024:1)

2.9.2 Gap 1: Joint estimation of operational reliability, availability and price perceptions

Although most regional studies consider consumer choice and marketing-mix effects, they do not consider the operational reliability that shapes consumer satisfaction and how reliability, availability, and price perceptions interact. Evidence from the Kenyan smallholder study demonstrates how availability drives market purchases, while South African wheat studies show how policy-related prices and input supply affect demand for investments, demonstrating the satisfaction/trust focus of customer-centric strategy frameworks. However, these have not been integrated into a single explanatory model of satisfaction for distributors in the agrochemical manufacturing channel (Nyadieka, 2023:45-46,57; Dube *et al.*, 2020:2; Deng, 2024:1). Furthermore, while regional studies continue neglecting the analytical integration of technical/advisory support and after-sales service with price perceptions, these factors are critical to the subjective service quality and loyalty in B2B contexts (Khan *et al.*, 2024:299-300; Roimen *et al.*, 2019:132).

2.9.3 Gap 2: Distributor-centred evidence (versus end-user consumers)

Most studies concentrate on end-consumers (farmers), for example, looking at the impact of availability, brand familiarity, price, and perceived quality on farmers' decisions, while distributor satisfaction (the manufacturer's immediate B2B customer in South Africa) is rarely the focal point. There is thus a blind spot in measuring manufacturer–distributor relationships regarding call-off patterns, share of orders, and allocation decisions (Nyadieka, 2023:42-46; Deng, 2024:1). Distributor-facing variables such as technical assistance, training, troubleshooting, and after-sales follow-up are thus under-explored at the manufacturer–distributor interface, notwithstanding being regarded as core service quality by the channel (Khan *et al.*, 2024:299-300; Roimen *et al.*, 2019:132).

2.9.4 Gap 3: Linking satisfaction drivers to behavioural outcomes under real constraints

Satisfaction-related studies balance operational and pricing considerations yet fail to articulate how technical/advisory support and resolution of after-sales problems (e.g. resolution time, first contact resolution) and fill rate and lead time determine behaviours (share of call-off, repeat ordering) (Khan *et al.*, 2024:299-300; Nyadieka, 2023:13). In South Africa, where market prices and input supply significantly determine investment in inputs, the need to isolate the firm-controllable drivers (availability, delivery accuracy, complaint handling) and link them to behavioural outcomes is pressing (Dube *et al.*, 2020:2; Nyadieka, 2023:43, 56; Deng, 2024:1).

Consistent with the problem statement, this research will transform the service quality at the distributor interface into four quantifiable levers: (i) service (technical advice, training, and problem diagnostics), (ii) service (post-delivery follow-up, and warranty/return management), (iii) service (prompt confirmation, validation, and response), and (iv) service (problem resolution, service at the first contact, quality of service closure). These levers, together with availability/lead time, provide a composite structure of distributor satisfaction (Khan *et al.*, 2024: 299-300; Dube *et al.*, 2020:3; Nyadieka, 2023: 13; Roimen *et al.*, 2019: 132).

2.9.5 Gap 4: Contextual constraints (finance, coordination, and digital bottlenecks) are acknowledged but under-integrated in models

Three structural realities are consistently described but seldom integrated into satisfaction models:

- Finance constraints: Smallholder farmers' input purchases are often credit-dependent; without access, the credit constraint will limit the adoption of more advanced services (Khan *et al.*, 2020:2-3).
- Coordination/value-network frictions: Fragmented stakeholders, limited market access and inadequate inputs detrimentally impact operational performance, implying that coordination deficits can blunt the reliability gains (Tsikada, 2025:1-2).
- Digital bottlenecks: Limited network coverage, high data costs, and low digital literacy can slow down and impede a firm's ability to respond to customers, particularly service quality elements such as order confirmations and complaint loops, which are critical to service quality (Born *et al.*, 2021:1).

2.9.6 Problem alignment: Why this matters in the South African agrochemical manufacturer–distributor channel

The South African agrochemical manufacturer, selling to distributors, operates within tight seasons and must make decisive stock positioning. Farmers show willingness to invest based on market prices and the costs/supply of inputs. Also, for distributors to meet demand during tight windows, on-time and error-free order fulfilment is crucial, as is the availability of product at depots/stockists. Eroding perceived reliability is the communication and data constraints that slow response to enquiries/complaints. The managerial challenge is to identify the levers that he/she thinks will positively impact distributor satisfaction and do it within the constraints of the price/finance situation (Dube *et al.*, 2020:2; Nyadieka, 2023:45-46; Born *et al.*, 2021:1; Tsikada, 2025:1-2).

2.9.7 Research questions derived from the gaps

RQ1: Building on the dimensions highlighted by Nyadieka (2023:13), Khan *et al.* (2024:299-300), Dube *et al.* (2020:3) and Roimen *et al.* (2019:132), which factors among availability/lead-time reliability, delivery accuracy/complaint handling, technical/advisory support and after-sales service, communication efficiency, and price perceptions most strongly explain distributor satisfaction in the South African agrochemical manufacturing channel?

RQ2: Drawing on insights from Khan *et al.* (2024:299 300), Nyadieka (2023:13) and Dube *et al.* (2020:3), what is the relative importance of service-quality levers (technical/advisory support, after-sales service, communication efficiency, problem resolution) vis-à-vis operational reliability/availability and price perceptions when estimated together?

RQ3: Informed by Dube *et al.* (2020:2), Khan *et al.* (2024:2-3), and Nyadieka (2023:56), how does distributor satisfaction relate to behavioural outcomes (e.g., call-off share, intention to reorder) in the presence of exogenous price/finance constraints?

RQ4: Building on the segmentation perspectives of Tsikada (2025:1-2) and Born *et al.* (2021:1), do driver effects vary by segment (e.g., region, order size, crop focus), given value-network and digital-infrastructure differences?

2.9.8 Proposed contribution and alignment to the study design

Another contribution is the articulation of service quality through concrete distributor-facing, auditable parameters (technical/advisory support, after-sales follow-up, communication efficiency, and problem-resolution metrics), and the determination of their relative weight in conjunction with availability and price perceptions (Khan *et al.*, 2024:299-300; Nyadieka, 2023:13; Dube *et al.*, 2020:3). The study constructs for the first time a distributor-oriented model of satisfaction in operational reliability and availability at a price in order to integrate the three components for the South African context, which is seasonally bound and highly regulated.

It will focus on estimating relative driver significance and connecting satisfaction to outcome behaviours (e.g. call-off share) while controlling for price/finance constraints and gatekeeping coordination/digital bottlenecks and translating this synthesis in Section 2.8 to a decision-useful prioritisation for managers (Nyadieka 2023: 45-46; Dube *et al.,* 2020:2; Khan *et al.,* 2024:2-3; Tsikada 2025:1-2; Born *et al.,* 2021: 1; Deng, 2024:1).

2.10 Chapter summary

The purpose of this chapter was to review the available literature on customer satisfaction in the South African agrochemical manufacturing industry. It provided the global, African and local agrochemical context, explaining the impact of manufacturing capacity, imports, pricing, regulations, and the environment on the operational conditions of the firms. This was followed by an analysis on customer satisfaction and service quality, focusing on the dimensions of product performance, product and service availability, delivery and documentation reliability, responsiveness, communication, technical support, and relationship management; as well as quality and value. These dimensions were associated with the internal operational control systems of the firms in the areas of planning and control, inventory management, and the management of logistics and information.

The elements do not act alone; they shape customers' perception of reliability and support over time. Although the works have grown in number, some voids have remained. Some of the less examined areas include: the lack of studies on manufacturer–distributor relationships in the South African agrochemical channel; the limited works that simultaneously consider reliability, availability and price perceptions; and the scarce works that integrate behavioural outcomes with real-life constraints like finance, level of coordination, and digital limitedness. These voids helped

define the problem statement, leading to the formulation of the four research questions, which will shape the empirical study in the coming chapters.

CHAPTER 3: RESEARCH METHODOLOGY

3.1 Introduction

The factors impacting customer satisfaction in the South African agrochemical manufacturing industry are discussed in this research. The overall research method philosophy and approach, location of the researcher, overall research design, strategies of population and sampling, strategies of collecting and analysing data, and strategies for maintaining reliability and validity and ethical measures are all explained in this chapter. The methodological framework used was determined by the research goals and objectives as stated in chapter 1 and corresponded to the studies conducted in qualitative research in business and management (Creswell, 2014:4; Omoruyi & Mafini, 2016:44).

3.2 Research approach

The approach used in this research was qualitative. This type of research paradigm is suitable for research questions that seek to understand and explore different dimensions of meanings, experiences, and perspectives, as opposed to measuring variables and testing hypotheses (Creswell, 2014:4; Polit & Beck, 2014:8). The aim of this study was to understand and explore the experiences of internal employees of an agrochemical manufacturing firm regarding the factors affecting customer satisfaction.

Hence, it was appropriate to take a qualitative approach, as the researcher was able to record detailed descriptions of the inner workings of the operations, the difficulties of the supply chain, the workings of the communication systems, and the people's responses to their customers. This approach provided a better understanding of how internal mechanisms and external actors can work together to develop satisfactions outcomes.

3.3 Research philosophy

The study was grounded in an interpretivist research philosophy. Interpretivism assumes that reality is socially constructed and that people attach meanings to their experiences, which researchers need to understand from the participants' point of view (Moon *et al.*, 2016:3; Bryman *et al.*, 2014:24).

In this framework, the goal was not to statistically generalise to the whole population of agrochemical employees, but rather to gain an understanding of how employees of the particular company understood customer satisfaction and the internal complexities thereof. This is why the interpretivist position shaped the choice of semi-structured interviews, the emphasis of the subjective experience of respondents, and the application of inductive thematic analysis.

3.4 Researcher positioning: The reflexive stance of the researcher

The researcher was employed by the agrochemical manufacturing company he was studying. This insider position had significant consequences for both access and interpretation. On the one hand, it made it easier to recruit potential respondents who had the relevant knowledge without the researcher having to provide context for the discussion, as they were already familiar with the operational setting. On the other hand, it introduced potential bias, as the researcher may have had particular expectations that shaped their experience, and therefore influenced the data collection and analysis stages.

In an effort to attempt to minimise these risks, the researcher took up a reflexive stance. Moving with reflexivity meant having a constant cognisance of personal biases, making the interview guide with care, and intentionally working on open, neutral questions as opposed to leading ones (Creswell, 2014:186). In the course of analyses, the researcher moved stepwise through the documents, using the transcripts verbatim, and incorporated direct quotes to illustrate his thematic development, and the paper trail of his findings to ensure that analyses were interpretive enough to reflect the language of respondents and not of the researcher's prior mental models of the organisation.

To clarify the potential influence of researcher bias more explicitly, the main risks associated with an insider position included confirmation bias (interpreting responses to fit pre-existing beliefs about internal constraints), social desirability bias (participants moderating criticism due to perceived organisational proximity), and selective attention during coding (over emphasising familiar issues while under weighting less visible concerns) (Berger, 2015:219; Finlay, 2002:210).

To mitigate these risks, several procedural safeguards were applied. First, the interview guide was structured around open ended, neutral prompts, and follow up probes were used to invite examples and clarify meaning rather than confirm assumptions (Creswell, 2014:186). Second, confidentiality and voluntariness were repeatedly emphasised at recruitment and at the start of each interview to reduce perceived pressure to respond in a particular way. Third, reflexive notes were maintained as part of the study audit trail, capturing assumptions, decisions, and shifts in

interpretation during interviewing and coding, and these notes were reviewed during analysis to bracket prior expectations. Finally, analysis proceeded iteratively from raw transcripts to codes, categories, and themes, with frequent checking back to verbatim extracts and attention to disconfirming or divergent accounts, to ensure that themes remained grounded in participants' language rather than organisational narratives. This reflexive approach strengthens confirmability by making the interpretive process transparent and open to scrutiny (Nowell *et al*., 2017:5–7).

3.5 Research methodology

3.5.1 Research design

The researcher adopted a qualitative, descriptive research design for this study. Descriptive qualitative designs are appropriate when researchers attempt to provide a complete account of events or experiences in everyday language, but with a close adherence to the data (Sandelowski, 2000:335). In this situation, the aim was to account for the ways in which internal employees perceived the operational, supply chain, communication, and service factors that pertained to customer satisfaction, and the impacts thereof.

This research consisted of two major parts: a literature review and an empirical study using semi-structured interviews. Existing research on agrochemical supply chains, customer satisfaction, service quality, and internal operational factors was synthesised in the 2nd of the literature review. The research questions were further refined using the literature review, and the empirical research interview guide was developed (Omoruyi & Mafini, 2016:44; Dorazio-Giardina, 2023:4).

3.5.1.1 Critical literature review

The scope of the literature review included the following: the agrochemical industry in the world and in South Africa, the supply chain and operational inefficiencies in the agrochemical context, the customer satisfaction and service quality in B2B relationships, and the integrated internal factors that influence satisfaction. A conceptual and empirical groundwork that the study was built on was constructed using peer-reviewed journal articles, books, industry and policy reports.

The review suggested that the other factors that affect customer satisfaction in the agrochemical industry, in addition to the product quality, are supply reliability, support technical responsiveness, effective communication, control over regulations and logistics, and quick responsiveness

(Omoruyi & Mafini, 2016:46; Asare & Prempeh, 2016:2). These factors were used to define the research focus, purpose, objectives, and interview questions.

3.5.1.2 Empirical study

During the interviews, internal employees of a chosen agrochemical manufacturing company were the focus of the empirical component. Employees provided these accounts and were able to discuss their experiences and viewpoints, and also ensured that the various pertinent subjects were aligned with the goals of the research (Adeoye-Olatunde & Olenik, 2021:1359).

3.6 Population and sampling

3.6.1 Population

The participants under the population of interest were employees of a South African agrochemical manufacturing company and whose primary activities contributed to the overall satisfaction of the customers. These participants were the employees who worked in the areas of production planning, manufacturing, supply chain and logistics, customer service, and commercial activities in exports.

At the time of the research, the population that could be reached was a small fraction of these employees across various functional areas and levels of the organisation. These employees were able to offer their perspectives on the internal processes and limitations that impacted the service reliability and the delivery performance, communication with customers, and overall the quality of the relationships with the customers who were distributors in the Southern African region.

3.6.2 Sampling

Non-probability purposive sampling with elements of convenience sampling was employed (Etikan *et al.*, 2016:2; Malterud, 2012:795). In purposive sampling, individuals are selected due to their ability to contribute rich and pertinent information regarding the phenomenon of interest. For this study, the inclusion criteria were focused on employees who:

- had at least a minimum period of experience in the company,
- were directly involved in processes that could affect customer satisfaction, and
- worked in roles linked to the export and distributor customer base.

Having met this criterion, diversity across functions and levels of seniority was sought by the researcher to ensure that the different perspectives from the operational, coordination, and management functions were captured. Sampling continued until the information power was deemed sufficient (saturation), that is, until the subsequent interviews stopped contributing to new, relevant insights given the study purpose and particulars of the sample and research questions (Malterud, 2012:797). A total of ten semi structured interviews were conducted with internal employees across key functional areas linked to export operations and the distributor customer base. Sample adequacy was evaluated during data collection using the principle of information power, which emphasises that fewer participants are required when the study aim is specific, the sample is purposive and information rich, the dialogue quality is strong, and the analysis is focused. In parallel with data collection, the researcher reviewed emerging codes and themes iteratively after each interview. As interviewing progressed, later interviews largely confirmed and elaborated existing codes rather than introducing substantively new themes, indicating that the dataset had reached sufficient saturation for the purposes of the study and the stated research objectives (Malterud *et al*., 2016; Guest*et al*., 2006; Saunders *et al*., 2018).

3.6.3 Recruitment

Using a brief description of the study, the candidate was screened for relevancy, subsequently sent a calendar invitation for a Microsoft Teams interview. Following the ethics of technology-mediated research, recruitment and selection must be equitable and just, and identity verification (if applicable) and information equity (informed consent) must be addressed (Cilliers & Viljoen, 2021:7). This involves providing the participants with information on the research, ensuring that they know that they can withdraw from the process at any time, and providing them with the contact information of the researchers so that they can make an informed decision (Cilliers & Viljoen, 2021:7).

3.7 Data collection procedure

The interview data collection procedure included interviewing participants, obtaining informed consent, and the interview process and interview recording technical arrangements.

3.7.1 Critical literature review

The researcher engaged in a critical literature review prior to embarking on the empirical data collection. This was also undertaken in these sections, 3.5.1.1, and reported in Chapter 2. This review is useful to clarify and establish the understanding of prior research on customer satisfaction, service quality, and operational performance in the agrochemical and related supply chains, and also to identify the gaps that justify this study. (Rajeev *et al.*, 2025:534; Dera *et al.*, 2020:2)

3.7.2 Empirical study

3.7.2.1 Interview guide and alignment

For the empirical part of the study, semi-structured interviews were undertaken, and these interviews were guided by an interview guide that had been aligned with the research objectives and literature. This guide, the one found in Appendix B, consisted of the internal operational challenges, production planning, supply reliability, communication practices, after-sales service, and the participants' perceptions on the most valuable aspects that customers want and satisfaction enhancement.

3.7.2.2 Recruitment, information sheet, and consent

Potential participants were contacted by email and given an information sheet and consent form prior to the interview.

3.7.2.3 Interview platform, timing, and setting

The interview was done at a time that was convenient to the interviewee and via Microsoft Teams, which also was a way to enabled participants who were staff in different geographical locations, and also for voice recording of the interview, given that the participants consented to that. The participants chose to speak in English, and their interview was done in a setting where their interview was conducted privately and where they could talk without holding back.

3.7.2.4 Interview procedure and probing

The first step in every interview was to summarise the purpose of the study, confirm that the interviewee had given their consent, and then explain that their response would remain confidential. The researcher stayed within the parameters of the research questions and

employed a series of follow-up questions that addressed the gaps within the given responses (Adeoye-Olatunde & Olenik, 2021:1362).

3.7.2.5 Recording and transcription

The audio of the meetings was transcribed in full to facilitate analytical procedures.

3.8 Pilot study

An initial pilot study interview was conducted to validate one participant, whose data from the study indicated met the study's inclusion criteria. Assuring the credibility of the online platform, the interview was conducted, and the questions asked were sequenced and phrased to the reviewer's specifications. The pilot study interview was not excluded from the dataset, as the questions asked and the methodology of the interview were the same as those used in the actual study.

3.9 Data management

We created and organised our audio files and transcripts in a secure manner with a specific folder structure that made use of unique identifiers, date-stamped filenames, and a permitted-access repository. Decisions and transformations, along with versions, were captured by an audit trail. Category changes were captured by a coding log and table-based answer capture, which served as a basis for the data (Nowell *et al.*, 2017:5-7). This documentation allows other researchers to reconstruct the analytical route taken, which provides the basis for the reliability and validity of the work. The use of third-party resources required us to address issues of confidentiality and data storage, which were reflected in our consent documentation (Cilliers & Viljoen, 2021:9).

3.10 Data analysis

Interviews that were transcribed were subjected to the method of thematic analysis, specifically the inductive approach, as outlined by Braun and Clarke (2006:79). Thematic analysis is a method that is both flexible and rigorous for describing and reporting the analysis of patterns, or themes, from qualitative data.

The analysis followed six overlapping phases (Braun & Clarke, 2006:87):

- Familiarisation with the data, by reading and re-reading transcripts and noting initial ideas.
- Generating initial codes by systematically coding segments of text relevant to the research questions.
- Searching for themes by collating codes into potential categories and broader themes.
- Reviewing themes by checking whether themes accurately reflected the coded data and the dataset as a whole.
- Defining and naming themes by refining each theme and clarifying the story it told about the data.
- Producing the report by selecting vivid, representative quotations and relating the analysis back to the research questions and literature.

For this analysis, the researcher transitioned from transcripts to codes to categories and ultimately to final themes using colour coding and reduction tables. In Chapter 4 and Annexure D, these tables will be made available. The authenticity of the data analysis can be tracked through the raw data due to the systematic and transparent process employed.

3.11 Reliability and validity

In qualitative research, trustworthiness is the equivalent concept, understood as credibility, transferability, dependability, and confirmability (Lincoln & Guba, 1985:301; Nowell *et al.*, 2017:3). In this study, trustworthiness has been approached from multiple angles.

3.11.1 Credibility

Credibility can be illustrated through the literature-based interview guide, the interview participants who had the relevant experience, the use of the information power theory to determine interview saturation, and the meticulous use of transcripts. To illustrate key themes in participants' accounts thoroughly, Chapter 4 includes verbatim extracts.

3.11.2 Transferability

Transferability is concerned with a rich description of the participants and the organisational context in which they operated. This enables readers to determine the extent to which the findings can be applicable in other settings, particularly in the agrochemical and B2B supply chain contexts.

3.11.3 Dependability

Dependability can be illustrated through the audit trail of the methodological choices made. This pertains to the documenting of criteria used for sampling, recruitment, data collection, and analysis (Polit & Beck, 2014:323).

3.11.4 Confirmability

Confirmability is illustrated by the reflexivity, the audit trail of coding and the development of themes, and the use of verbatim accounts of participants that demonstrate the link between the evidence and the interpretation (Moon *et al.*, 2016:4). Confirmability was further supported through reflexive note keeping (as part of the audit trail) and iterative checking of codes and themes against verbatim extracts, including attention to divergent viewpoints to limit confirmation bias.

3.12 Ethical considerations

The approach taken in this study during this study has been guided by the ethical frameworks offered by North-West University and the Business School by North-West University Economic and Management Sciences Research Ethics Committee (EMS-REC) with ethics number NWU-00831-25-A4. The ethical clearance was granted prior to the commencement of collecting data. The core ethical aspects adhered to are listed below (Bryman *et al.*, 2014: 136; Polit & Beck, 2014: 91).

3.12.1 Informed consent and voluntary participation

Informed consent was obtained through the provision of information sheets which outlined the details of the study, the study's aims, what was required of the participants, study risks and benefits, the potential benefits of the study, what the data will be used for, and the fact that participation in the study was voluntary and that participants can withdraw at any time without any further consequences.

3.12.2 Confidentiality and anonymity

All information that was obtained through the interviews was kept confidential. In the reporting of the findings, identifying information was omitted.

3.12.3 Privacy and respect

Every person who was being interviewed was treated with the utmost respect. They were given the opportunity to choose an interview time that was most convenient for them, and to conduct the interview in a setting that was most private and respectful of their professional obligations.

3.12.4 Data security and storage

Electronic recordings and transcripts were stored securely, with access limited to the researcher and supervisor, in accordance with institutional guidelines.

3.12.5 Risk and benefit

The research posed minimal risk to participants. The company stands to gain from the study and could utilise the findings to enhance its internal processes, resulting in greater customer satisfaction.

3.13 Limitations and delimitations

As is common with purposive qualitative designs, statistical generalisability is not the objective here, as the strength of the design lies in the depth, contextual nuance, and readers' transferability judgment (Etikan *et al.*, 2016: 3-4). There is a risk of self-reporting bias in the interviews whereby the participants may either under-report or over-report their experiences, but this risk was alleviated when we employed detailed transcripts, iterative probing, and a formal, rigorous analytic method documentation to bolster credibility and confirmability (Nowell *et al.*, 2016: 5-10). Delimitations are related to the selected context and inclusion criteria, whereby the analysis is strategically focused on those participants who are most relevant to the purpose of the study (Etikan *et al.*, 2016: 2-3).

3.14 Chapter summary

This chapter detailed the qualitative, interpretivist research methodology regarding the study of the influencing factors of customer satisfaction for a South African agrochemical manufacturing company. The research method, design, population and sample, data collection technique, data analysis, trustworthiness, and ethical issues were all presented. These methodological decisions provided a fitting structure to the research aim and objectives. The findings obtained from the interview data thematic analysis are presented in Chapter Four and are structured according to the research questions.

CHAPTER 4: FINDINGS AND INTERPRETATIONS

4.1 Introduction

The current chapter has findings of the empirical study and the relationship these findings bear to the purpose of the study. The study aimed to understand the factors affecting customer satisfaction within the South African agrochemical manufacturing industry and the extent to which and how planning, product performance, supply reliability, and relational practices affect customers' experience with the company. The discussion of this chapter is based on the qualitative data obtained from the interviews, and it utilises the same structure as that of the interview guide.

The findings are presented based on the main questions that were asked during the interview. For every question, the findings provide the major themes that were identified, and to demonstrate these themes and how the interviewees elaborated on their experiences, there are some selected verbatim quotations from the interviews.

In addition to presenting themes and verbatim extracts, each question includes a brief analytical interpretation that links the empirical themes back to the literature review to strengthen explanatory depth and show where the findings confirm, extend, or nuance existing scholarship.

4.2 Questions

This section addresses the findings of each of the interview questions, one after the other. Sub-headings are provided to indicate the corresponding questions, which are then followed by the themes that came from the interviewees' responses.

4.2.1 Question 1: In your experience, which internal operational challenges most often impact customer satisfaction?

The focus of this question was on what internal operational challenges participants in this study considered to occur most frequently regarding customer satisfaction as of the time of planning and control, scheduling and routing, communication and alignment, documentation and compliance, production and quality control, information and forecasting, and transport and logistics.

(i) Categorisation reduction

Using thematic analysis, the dataset for Question 1 was reduced to manageable categories and displayed in **Table 1**, with verbatim transcriptions from the interview participants.

Table 1: Transcripts to Categories Reduction

Question 1: In your experience, which internal operational challenges most often impact customer satisfaction?

Participant	Transcript (Answer)	Categories
1	I think, operationally, the biggest factor that can impact customer satisfaction is supply chain inefficiencies. I'm not saying that this is always the case, but it certainly has the potential to have an impact. Every now and then, we encounter a situation where there is a perceived inefficiency. In my view, that is probably the biggest operational issue that can influence customer satisfaction. The supply chain, not just manufacturing, but also labelling, transport, customs clearance, import and export permits, cross-border logistics, and documentation, all form part of the overall value chain. Within that supply chain, I think supply chain performance has the greatest impact on customer satisfaction.	Supply chain Production Planning Distribution Documentation
2	I must say, from my experience, there isn't much of a problem overall. However, the biggest issue we face relates to lead times, and sometimes transportation. It's not necessarily a direct problem caused by Company X, but rather one that sometimes depends on the transporter that has been hired. I think those are the major issues worth mentioning.	Lead Times Distribution

3	One of the challenges, I think, is ensuring the availability of the stock we need at the right time. That is a very important aspect to guard against; it can be a challenge for any organisation, and I see that as one of the limitations at times. Take Product X, for example, which has been one of our key products for a long period. Not having it in stock at the right time is one of the challenges we face. Another issue is the ability to offer a comprehensive range of products, which may be limited by a lack of understanding of our market, how it operates, and how we can capture the full spectrum of the marketplace. Competitive pricing is another factor. Although this has improved recently, for some products, such as Product B, we have struggled to capture the market because of the inability to obtain competitive prices for certain products you offer. Another aspect, probably not a major issue but still important, is the inability to accurately forecast and plan for demand. This can be a significant operational challenge on your part. Sometimes it is difficult for us to say with certainty that when we need specific products at a given time, they will be available and delivered as required. So, from an operational point of view, these factors together present a major operational challenge for us.	Production Planning Product Range Market Knowledge Competitive pricing Forecasting
4	The only challenge we have really experienced with Company X and your product range is that occasionally a product or two may be out of stock. This sometimes happens due to changes in pack sizes. For example, a few years ago we discussed reducing the size of the pack for one or two products, and that took a little time to implement, but it was eventually completed. There was a short waiting period during that process.	Production Planning

	At times, some of the products recommended for our macadamia programmes may also be temporarily out of stock. It is never a long delay, but it does present a minor challenge when we need those products urgently. That's really the only issue we have experienced that has held things up. It's not a major problem; the product eventually becomes available, is placed on back order, collected, and supplied to the farmers.	
5	Within Company X, one of the key challenges that impacts us as your customer is when we place orders, provide timelines, and the product does not arrive as scheduled. For example, we might indicate that we need a product delivered to Region X by a specific time, but it sometimes fails to arrive when required. To illustrate, a farmer planning to spray in June needs the product available by that date; if that window is missed, we lose the sale opportunity. This highlights the need for better alignment of your operational processes with our demand requirements. In some cases, delays have resulted in products reaching expiry before use.	Production Planning (Downstream) Customer relationship impact Expired products
6	I think it's probably more related to corporate structures. I'm not sure whether you're referring directly to operations, such as when we purchase product, or to how the organisation engages with us as a customer. The main challenge is time. As an international customer, we need product delivered as soon as possible, although we do understand that some delays are inevitable. At times, the product is not immediately available, but we've worked through these issues together. It's not a major challenge or a negative point, just something that requires collaboration and adjustment.	Corporate structures Production Planning Forecasting

	I also understand that there are ongoing developments, such as new sachets, new labels, and forecast inaccuracies, that contribute to these time delays. Overall, time delays are probably the biggest challenge when dealing with a large company like Company X, as there are many customers to manage.	
7	From our side, one of the biggest challenges we face relates to documentation processes. At times, there has been a lack of documents or incorrect documentation when bringing products into the country. This has occasionally resulted in logistical delays, for example, when products were incorrectly labelled or when paperwork errors caused clearance and delivery delays. Overall, documentation and logistical delays are among our biggest recurring challenges.	Documentation Supply chain Distribution Production Planning
8	The glitches in supply or order processing are some of the issues we experience. I personally have less involvement in the operational side, as my colleague focuses more on that area. However, from the feedback I receive, processing challenges and unnecessary mistakes do occur, and these naturally lead to delays. From an operational perspective, the challenges that most often impact customer satisfaction are quality-related, where we encounter issues linked to Quality Control and product verification. I believe this topic will probably arise again in another question later on.	Supply chain Production Planning Quality Assurance

(ii) Theme Reduction

The reduction progressed from categories to themes. The relationships among categories were examined and grouped where appropriate. The resulting themes for Question 1 are displayed in **Table 2**.

Table 2: Reduction from Categories to Themes (Question 1)

Categories	Themes	Occurrence

Supply chain (1) Production Planning (2) Distribution (1) Documentation (1) Lead Times (1) Distribution (1) Production Planning (2) Product Range (2) Market Knowledge (2) Competitive pricing (2) Forecasting (2) Production Planning (2) Production Planning (2) (Downstream) Customer relationship impact (2) Expired products (2) Corporate structures (2) Production Planning (2) Forecasting (2) Documentation (1) Supply chain (1) Distribution (1) Production Planning (2) Supply chain (1) Production Planning (2) Quality Assurance (2)	(1) Supply Chain Management (2) Market Competitiveness and Organisational Enablement	9 16

(iii) Theme discussion

Theme 1: Supply chain management

Across the interview responses, the most comprehensive articulation of how supply chain performance drives customer satisfaction came from Participant 1. Their statement set the scope for the end-to-end chain and named the pain points most likely to erode confidence. As they put it, "*the biggest factor that can impact customer satisfaction is supply chain inefficiencies … The supply chain, not just manufacturing, but also labelling, transport, customs clearance, import and*

export permits, cross-border logistics, and documentation, all form part of the overall value chain," and, within that chain, "*performance has the greatest impact on customer satisfaction*."

This view is echoed in other accounts that single out documentation and cross-border execution as recurring bottlenecks, for example, "*a lack of documents or incorrect documentation … resulted in logistical delays*," with clearance and delivery impacted accordingly.

Literature supports this emphasis on execution risk along the chain. Reviews of sustainable supply chain management show that customer and multi-stakeholder pressures frequently surface as supply, demand and reputational risks, all of which are sensitive to delays, information gaps and quality lapses across logistics and documentation processes (Rebs *et al.*, 2018).

In the same body of work, conventional supply chain risks are synthesised as supply, demand, product and information risks, a frame that maps directly onto the interviewees' concerns about availability, timing, quality assurance and paperwork accuracy (Rebs *et al.*, 2018).

Where firms strengthen information sharing and documentation controls, they reduce the likelihood that stakeholder-triggered risks translate into customer-visible service failures (Rebs *et al.*, 2018).

Finally, empirical evidence on operations enablement shows that applying big-data analytics to planning and inventory is one of the highest-impact levers to stabilise supply at the moment of need, with professionals ranking inventory and stockout management as the top areas where analytics adds value (Aljabhan & Abeyie, 2022).

In summary, Participant 1's statement is the strongest because it captures the full chain, identifies where execution failures tend to occur, and aligns with research that links stakeholder pressure, risk categories and analytics-enabled controls that prevent stockouts and late deliveries.

Theme 2: Market competitiveness and organisational enablement

Across the interview responses, Participant 3 offered the most comprehensive account of how competitiveness is enabled, linking product-market fit, market knowledge, pricing and forecasting to customer satisfaction. In a single passage, they connected range adequacy and market insight to price positioning and planning accuracy, which together shape competitive performance: *"Another issue is the ability to offer a comprehensive range of products, which may be limited by*

a lack of understanding of our market… Competitive pricing is another factor… Another aspect… is the inability to accurately forecast and plan for demand" (Participant 3).

This same response underscores reliability at the moment of need, tying demand planning to on-time delivery: *"Sometimes it is difficult for us to say with certainty that when we need specific products at a given time, they will be available and delivered as required."*

Considered collectively, this emerges as the strongest statement because it integrates multiple enablers of competitiveness rather than isolating a single operational pain point.

The literature reinforces this integrated view. First, competitiveness requires a deliberate strategy that aligns with customer needs, with organisations "increasingly turning their attention to a customer-centric approach, namely customer service as a means of achieving competitive advantage" (Pavliuk & Noda, 2020:93-101).

Their discussion of key success factors further situates pricing, product quality and portfolio breadth as core levers of competitive advantage (Pavliuk & Noda, 2020:96-97).

Second, organisational agility literature explains how these levers translate into market outcomes: firms that can sense shifts in demand and *respond swiftly and appropriately* by "utilising and reconfiguring internal resources" gain advantage (Zitkiene & Deksnys, 2018:118-121).

Agility frameworks emphasise aligning competitive bases such as speed, flexibility, innovation and quality, supported by enablers like structures, processes and technology (Zitkiene and Deksnys, 2018:118, 120-121).

In practical terms, Participant 3's call for better forecasting, market knowledge and competitive pricing reflects exactly this sense-and-respond capability: without accurate demand signals, fit-for-purpose portfolios and price positions, speed and reliability at the customer interface suffer, eroding perceived competitiveness.

In summary, Participant 3 most convincingly linked internal enablement to external competitiveness. Their account aligns with evidence that a customer-centred strategy, supported by agile structures and capabilities, is foundational to sustained competitive advantage.

4.2.2 Question 2: How do production planning or scheduling delays influence customer perceptions of reliability?

Question 2 aimed to understand how delays in production planning or scheduling shaped customer judgements of reliability, including on-time delivery and fulfilment. The responses to this question are provided in **Annexure D1**.

(i) Categorisation reduction

Using thematic analysis, the dataset for Question 2 was reduced to manageable categories and displayed in **Annexure D1**, with verbatim transcriptions from the interview participants.

(ii) Theme reduction

The reduction progressed from categories to themes. The relationships among categories were examined and grouped where appropriate. The resulting themes for Question 2 are displayed in **Table 3**.

Table 3: Reduction from Categories to Themes (Question 2)

Categories	Themes
Supply Chain Context (1) Production Planning (1) Information & Forecasting (1) (Upstream) Customer relationship impact (2) Dependency (1) Production Planning (1) Communication (1) (Downstream) Customer relationship impact (2) Production Planning (1) (Upstream) Customer relationship impact (2) (Downstream) Customer relationship impact (2) (Upstream) Customer Customer relationship impact (2) Production Planning (1) Information & Forecasting (1) Information & Forecasting (1)	(1) Planning Alignment and Visibility (2) Perceived Reliability and Relationship Outcomes

Production Planning (1) (Upstream) Customer relationship impact (2) (Downstream) Customer relationship impact (2) Production Planning (1) (Upstream) Customer relationship impact (2) Quality assurance (2) Communication (1) Supply Chain Context (1) Production Planning (1) (Upstream) Customer relationship impact (2) (Upstream) Customer relationship impact (2) Production Planning (1) Communication (1)	

(iii) Theme discussion

Theme 1: Planning alignment and visibility

Across the interview responses, Participant 1 provides the strongest and most thematically complete account of why planning alignment and visibility matter. They link seasonality, annual production runs, and early scheduling to perceived reliability, arguing that alignment must be established *well before* the demand window. As they put it, *"we work in an environment where the products we supply to third parties are, in most cases, highly seasonal… some production lines run only once a year, often six months before the product is needed"* and therefore *"it's… very important for both parties to be aligned on production planning, especially scheduling"* because delays *"do… impact our perception of reliability."*

Complementing this, Participant 5 stresses the downstream consequences when plans and forecasts are not visibly synchronised: *"when we do our forecasting, we expect that Company X will align with it… having production well planned and well scheduled is what we need… we may not be able to rely 100%… we are a bit cautious when committing to our customers."*

Taken together, these statements foreground the core of this theme: reliable service hinges on early, transparent visibility of plans, not last-minute expediting.

This mechanism is supported by the literature. Recent literature on supply chain visibility (SCV) describes visibility as the ability to obtain real-time and precise data over a network and over tiers

that allow operational flexibility and operational compliance. However, visibility is often obstructed by disjointed networks, low data standardisation, inadequate infrastructure, and trust deficits that prevent information sharing (Delgado *et al.*, 2025). With these circumstances, as Participants 1 and 5 mention, gaps between schedules and gaps in communication often can lead to a subjective perception of unreliability at the customer level.

At the same time, the literature in sales and operations integration also positions information technology and business analytics as major facilitators of cross-functional alignment in the sales and operations integration process. Literature reviews demonstrate that organisations improve on the integration of supply and demand and the integration of planning activities that allow organisations to develop and implement effective production and logistics plans that are achievable and visible, when sales and operations planning is supported by adequate information systems and analytics. More importantly, value is created when IT is incorporated and aligned to the sales and operations planning process, and integrated models outperform decoupled planning (Nicolas *et al.*, 2021). This underscores the direct relationship between data and schedule visibility and customer reliability, particularly in reference to the interviews that underscore the importance of lead time at particular times of the year, as well as visibility of calendars, and timely communication.

Overall, it is Participant 1 who makes the most impactful contribution in this particular area, as he clearly and directly links perceived reliability to the seasonal cadence, the annual line timing, and the early joint scheduling. SCV and sales and operations planning literature support that the seamless integration of analytics and sales and operations planning practices is essential in overcoming visibility gaps in providing the alignment and transparency that the customer associates with reliability.

Theme 2: Perceived reliability and relationship outcomes

Among the interviewees, Participant 5 offered the strongest articulation of how planning slippages shape reliability perceptions and downstream relationships. They linked scheduling gaps directly to lowered willingness to make promises, heightened exposure with end customers, and reputational risk. In their words, *"we may not be able to rely 100% on [the supplier] as a supplier, so we are a bit cautious when committing to our customers… When the time comes, and the product is needed, and we fail to supply, it affects us badly as your customer. Our reputation is at risk because [the supplier] has not supplied the product".*

This statement captures two intertwined mechanisms. First, uncertainty in timing converts into conservative external commitments. Second, any miscommunication transmits reputational damage through the channel. Participant 3 echoed this erosion pathway, noting that *"when supply is delayed, it erodes confidence and creates a negative perception"* and raises doubts about capability and fairness, *"what if we fail to get the products we want on time"*.

The experiences of the participants have been validated, for instance, in the literature on multi-channel delivery, as for example, on-time delivery is an essential logistics output needed for the retention of customer satisfaction and customer loyalty. With respect to expectations of satisfaction and loyalty, as well as retention of the supplier's sustained confidence and relationship, even in the presence of competitive challenge, Dundar and Ozturk (2020: 2675-2693) find via empirical channel integration studies that on-time delivery has a positive, statistically significant effect, and that on-time delivery, in turn, influences competitive satisfaction positively and significantly.

In other words, as the participants stressed confidence and reputational stakes, the respondents also highlighted that reliable delivery times served as an anchor of trust.

This shows how research on logistics service quality (LSQ) places delivery reliability as one of the main components underpinning satisfaction and eventual loyalty, and long-term relationships. In the study Assessing the Effect of Logistics Service Quality on Customer Satisfaction and Loyalty, the author states that the higher the perception of the quality of logistics, the greater the satisfaction and loyalty intention, similar to what Participant 5 described as the reliable fulfilment mechanism that preserves credibility to the downstream customers (Vertesy *et al.*, 2022).

To sum up, the interviews together with the evidence show that perceived reliability is built up over time through the visible management of delivery time as well as service quality. When there is credibility to schedules and reliability to logistics performance, customers feel there is a safety to commit and a protection of the supplier's reputation. When schedules are not credible, customers are likely to hedge their commitments, and this is where the relationship equity is lost, as Participants 5 and 3 described.

4.2.3 Question 3: What supply chain obstacles have you encountered that lead to customer dissatisfaction?

Question 3 sought to establish which supply chain challenges participants had experienced that contributed to customer dissatisfaction, and to capture illustrative cases. The responses are provided in **Annexure D2**.

(i) Categorisation reduction

Using thematic analysis, the dataset for Question 3 was reduced to manageable categories and displayed in **Annexure D2**, with verbatim transcriptions from the interview participants.

(ii) Theme reduction

The reduction progressed from categories to themes. The relationships among categories were examined and grouped where appropriate. The resulting themes for Question 3 are displayed in **Table 4**.

Table 4: Reduction from Categories to Themes (Question 3)

Categories	Themes
Information (1) Communication (1) (Downstream) Customer relationship impact (1) (Upstream) Customer relationship impact (1) Documentation and discrepancies (1) Import implications (2) Lead Times (2) (Upstream) Customer relationship impact (2) Transportation (2) (Downstream) Customer relationship impact (2) Transportation (2) Forecasting (2) Production Planning (2) Import implications (2) Lead Times (2)	(1) Information and Documentation Integrity (2) Capacity, Timing and Cross-border Constraints

Documentation and discrepancies (1) (Upstream) Customer relationship impact (1) Production Planning (2) (Upstream) Customer relationship impact (2) (Downstream) Customer relationship impact (2) Account suspension (2) Import implications (2) Sales (2) (Upstream) Customer relationship impact (2) Production Planning (2) Information (1) Communication (1) (Downstream) Customer relationship impact (1) Quality issues (1) Import implications (2) Transportation (2) Production Planning (2) Sales (2) Import implications (2) Documentation and discrepancies (1) Quality issues (1)	

(iii) Theme discussion

Theme 1: Information and documentation integrity

Across the interview responses, Participant 1 provides the strongest, most granular account of how information and documentation integrity shape customer dissatisfaction in cross-border trade. Participant 1 highlights that communication failures and paperwork errors generate cascading costs and time losses, long after the *"simple fix"* seems done. In their words, *"You can manage bad news, but it's very difficult to manage no news, as that prevents us from setting realistic expectations with our customers."* Further, a seemingly minor commercial error quickly becomes a border crisis: *"if a product is wrongly invoiced or incorrectly priced… when the product arrives in Country Y and we contact Company X to report errors on the documentation or discrepancies in the agreed price, it triggers a chain of complications… duties, permits, bank fees, and inspection costs are all based on the declared value on those documents… Someone must then go back to the border with the new paperwork to get approvals and stamps, because*

customs payments are made only on presentation of stamped import permits." The participant concludes that from the supplier's vantage, *"issuing a credit note seems like a simple fix… but it has a far greater downstream effect on our end."*

The literature aligns closely with this mechanism. Evidence from South African public-sector supply chains shows that weak controls over documentation, reporting, and compliance impede timely detection of irregularities, leading to non-compliance, delays, and ultimately poor service outcomes (Sibanda *et al.*, 2020). Strengthened internal controls and oversight reduce waste, unethical practices, and opacity, while improving transparency and accountability across procurement and logistics processes, the very attributes that prevent the *"credit-note but higher landed cost"* spiral described by Participant 1 (Sibanda *et al.*, 2020). In practical terms, accurate first-time documentation, disciplined change controls, and auditable information flows act as primary reliability signals in cross-border movements. When these are robust, downstream partners can plan confidently. When they are weak, even small discrepancies propagate into rework at the border, revised duties, and missed delivery windows, eroding trust and satisfaction.

In summary, Participant 1's statement is strongest because it traces the full chain from "information signal" to "border stamp", showing precisely how gaps in communication and documentation integrity translate into quantifiable delays and costs for customers. The Sibanda *et al.* article findings reinforce that organisations which embed effective oversight, internal audit, and documentation controls are better positioned to avoid these failure cascades and to protect perceived reliability in the eyes of downstream customers (Sibanda *et al.*, 2020).

Theme 2: Capacity, Timing and Cross-border Constraints

Among the participants, Participant 2 gave the strongest and most illustrative statement linking capacity and timing issues to cross-border constraints that directly affect customer satisfaction. P2 observed that *"even if production goes well, delays occur when trucks are held at borders for inspections or because of missing paperwork, and sometimes because ports are congested or closed due to weather. Products are then stuck for weeks while demand keeps increasing."* They added, *"Customers do not understand that it is not always our fault; they see only that we failed to deliver."* This comment encapsulates the theme's focus: capacity and timing challenges across production, logistics, and border processes create visible service gaps and damage perceptions of reliability.

The literature strongly corroborates such operational realities. Kudakwashe and Pooe, (2024) highlight that the fast-moving consumer goods (FMCG) sector in South Africa is highly susceptible

to supply chain disruption and operational delays, impacting the sector negatively, especially in the presence of geopolitical incidents, natural disasters, and infrastructural breakdowns. Their qualitative study points out border delays, port congestion, and other transport interruptions as key obstacles to flow continuity and, thus, erode profitability and customer trust.

The authors posit that uncertainty framework theory (UFT) aids in explaining this, as both supply and demand are volatile, necessitating that firms have varied sourcing, localised production, and a transparent interface with border control to be adaptive.

To keep in line with fostering operational capacity, flexibility, and the reliability of timing in highly disrupted environments, strategies such as multi-sourcing, buffer management, and nearshoring are practices that defend and strengthen against operational disruptions.

The mitigation tools discussed directly speak to the matters that Participant 2 was describing. The study concludes that South African firms need to build and develop visibility across the supply chain, collaborative management of the border, and proactive planning to counter the lapse and unpredictability of the cross-border logistics.

The testimony of the participants, and the literature speak towards the exact same insight and conclusion in that supply chain resilience in emerging markets is highly intertwined with the management of the cross-border trade. The shutdown of production is only one piece of the puzzle. When timing is uncertain and capacity is constrained, there are significant levels of production that result in zero efficient delivery and production. Predictive visibility is needed to cross as seamlessly as possible the boundaries of customs, logistics, and production. These factors, in combination, are the reason that confidence towards the customer greatly declines. Participant 2 perfectly captured the systemic interaction of capacity and timing that affects cross-border performance and the service reliability for the Southern African case.

4.2.4 Question 4: How do delivery delays or product unavailability typically affect customers' trust in the company?

Question 4 aimed to establish how delivery delays or product unavailability influenced customers' trust in the company, including perceived reliability and future purchase intent. The responses are provided in **Annexure D3**.

(i) Categorisation reduction

Using thematic analysis, the dataset for Question 4 was reduced to manageable categories and displayed in **Annexure D3**, with verbatim transcriptions from the interview participants.

(ii) Theme reduction

The reduction progressed from categories to themes. The relationships among categories were examined and grouped where appropriate. The resulting themes for Question 4 are displayed in **Table 5**.

Table 5: Reduction from Categories to Themes (Question 4)

Categories	Themes
(Upstream) Customer relationship impact (1) Supply Chain Context (1) Missed Opportunity (1) Lost Crops & Reduced Yields (1) Source products elsewhere (1) (Downstream) Customer relationship impact (1) Forecast & Planning (1) Delays (1) Product & Stock availability (1) (Upstream) Customer relationship impact (2) Last minute orders (2) Delays (1) (Downstream) Customer relationship impact (1) (Upstream) Customer relationship impact (1) Customer Payment reliability (1) (Upstream) Customer relationship impact (1) Product & Stock availability (1) Source products elsewhere (1) Delays (1) Communication (2) Delays (1) Product & Stock availability (1) (Upstream) Customer relationship impact (1)	(1) Supply readiness and timing (2) Customer communication quality

Source products elsewhere (1) Communication (2) (Downstream) Customer relationship impact (2) Product & Stock availability (1) Forecast & Planning (1) (Upstream) Customer relationship impact (1) Production planning (1) (Upstream) Customer relationship impact (1) Internal inefficiencies and incompetencies (1) Delays (1)	

(iii) Theme discussion

Theme 1: Supply readiness and timing

Across the interview responses, Participant 1 gives the strongest, most situational account of how timing and product availability shape trust in a seasonal, agriculture-driven context. Participant 1 explains that *"we operate in a highly seasonal business… even a one-week delay can result in lost crops or severely reduced yields. When that happens, customers often have to make alternative plans, sometimes even sourcing products from neighbouring countries… Delivery delays therefore have a serious impact on customer trust."* They add that once confidence drops, third parties *"start looking for alternatives before consulting us and keep those options as a backup plan."*

Academic research confirms that there is a positive and impactful relationship between LSQ and customer trust. According to the literature in quick commerce, LSQ availability, timely delivery, and accuracy, coupled with fair order discrepancy, all contribute to a positive customer satisfaction… Satisfaction and trust contribute to customer loyalty (Al-Mu'ani *et al.*, 2024).
This means that when the availability and timing are consistent, customers are more satisfied, trust the supplier more, and are more loyal. This is in line with the results of the interviews, where respondents emphasised the importance of narrowing the seasonal availability windows (Al-Mu'ani *et al.*, 2024).

Combining the interviews and literature, three implications for practice in seasonal agribusiness for supply availability and timing are evident. First, reliability needs to be shown before the demand window. This can be achieved with credible production calendars and stock positioning, so that the "right time" is achieved rather than just close. This is consistent with the literature findings that availability and timeliness are key drivers of quality satisfaction in service (Al-Mu'ani *et al.*, 2024).

Second, in the face of uncertainty, suppliers are encouraged to offer order status visibility and rapid resolution of discrepancies, as these features help reinforce trust and prevent clients from going to alternatives once revised plans are in place. (Al-Mu'ani *et al.*, 2024).

Thirdly, when there is the possible chance of delays, sending out specific, timely communication can maintain a balance of relationship equity by mitigating the erosion of trust through forming a plan revision that is reasonable, moving along the lines of keeping trust and satisfaction, which are the foundational elements of loyalty (Al-Mu'ani *et al.*, 2024).

To summarise this, Participant 1 is providing the most reliable explanation as it gets to the very specific operational limit when a failure in the timing will lead to an immediate conversion of lost yield, along with the degradation of confidence. The article's findings support that providing visibility, accessibility, timeliness, as well as failure recovery is a crucial pillar that keeps the satisfaction and trust steady, along with brand loyalty in time-sensitive markets (Al-Mu'ani *et al.*, 2024).

Theme 2: Customer communication quality

Across the interview responses, Participant 3 provides the strongest reflection on how communication quality affects customer experience and satisfaction. P3 explain that *"communication is not just about sending updates; it's about providing relevant, accurate, and*

timely information that helps customers make informed decisions. When there is silence or mixed messaging, customers lose confidence and feel neglected." Participant 4 supported this by adding that *"open and transparent communication throughout the order and delivery process helps us manage expectations and reduces unnecessary complaints."* These remarks underline that proactive, consistent communication forms the backbone of perceived reliability, as it bridges the uncertainty between order placement and delivery.

Research confirms that effective communication is a decisive factor in sustaining customer trust and satisfaction. Alharbi and Alharbi (2024) emphasise that communication quality, defined as the timeliness, clarity, accuracy, and relevance of shared information, has a statistically significant positive impact on customer satisfaction and loyalty within service environments. The study also notes that communication is a *"confidence-building mechanism,"* especially when operations face delays or disruptions, because it allows customers to anticipate outcomes and prepare accordingly (Alharbi & Alharbi, 2024:4). In service industries, clear and consistent messages about delivery progress or resolution timelines strengthen satisfaction, while inconsistent or incomplete communication is associated with negative perceptions of responsiveness and reliability (Alharbi & Alharbi, 2024:5-6).

When managing customer relationships, the quality of communication also functions as a preventative and a restorative mechanism. Preventatively, communication that is timely and clear helps to manage expectations and reduce perceived uncertainty. Restoratively, communication that is honest and timely during service failures helps to re-establish trust and mitigate dissatisfaction. Participant 3 reflected that academic evidence perfectly describes that customers view silence as disengagement and view transparency as commitment. Overall, interview evidence and academic literature state that in customer relationships, communication should be continuous, relevant (and responsive to customers' needs) during challenges so that customers feel informed, valued, and retain their confidence in the relationship.

4.2.5 Question 5: How would you assess the company's effectiveness in communicating product updates or service changes to customers?

Question 5 aimed to assess the perceived effectiveness of the company's communication of product updates or service changes, and to identify gaps in timeliness and clarity. The responses are provided in **Annexure D4**.

(i) Categorisation reduction

Using thematic analysis, the dataset for Question 5 was reduced to manageable categories and displayed in **Annexure D4**, with verbatim transcriptions from the interview participants.

(ii) Theme reduction

The reduction progressed from categories to themes. The relationships among categories were examined and grouped where appropriate. The resulting themes for Question 5 are displayed in **Table 6**.

Table 6: Reduction from Categories to Themes (Question 5)

Categories	Themes
Improvement Opportunity (N) (1) Improved communication (+) (1) Follow-up required (-) (1) Consistent communication and updates (+) (1) (Upstream) Customer relationship impact (2) Effective communication (+) (1) Improvement Opportunity (N) (1) 8.75/10 - Effective communication (+) (1) Lack of engagement (-) (2) Lack of collaboration (-) (2) Lack of product updates (-) (2) Effective communication (+) (1) Consistent communication and updates (+) (1) (Upstream) Customer relationship impact (2) Poor/Lack Communication (-) (2) Lack of collaboration (-) (2) (Downstream) Customer relationship impact (2) Awareness of the communication importance (2) Effective communication (+) (1) Consistent communication and updates (+) (1) Follow-up required (-) (1) Effective communication (+) (1) Consistent communication and updates (+) (1) 7.5/10 - Effective communication (+) (1)	(1) Operational communication quality and consistency (2) Proactive change communication and strategic engagement

5/10 - Poor/Lack Communication (-) (2) Lack of product updates (-) (2) Poor/Lack Communication (-) (2) (Upstream) Customer relationship impact (2)	

(iii) Theme discussion

Theme 1: Operational communication quality and consistency

Across the interview responses, Participant 4 offers the strongest statement on day-to-day communication effectiveness. P4 reports that *"communication is excellent between our two companies. Your team is often in contact with us regarding product availability and collection readiness, and whenever there are any holdups, we are informed immediately. Communication is frequent, open, and effective… Compared to several other suppliers we work with, Company X performs better in this regard."*

This account ties concrete practices, regular availability updates and prompt holdup alerts to a positive comparative benchmark.

Other participants broadly corroborate this operational picture, while still signalling incremental improvement areas. Participant 1 notes that *"communication… has improved tremendously… [it is] probably a hundred times better than it used to be… Occasionally, one still needs to ask and follow up, but overall, communication has become much more consistent,"* adding a cautionary example where poor communication at a group affiliate *"led to excessive delays… causing a lost sale."*

Participant 2 likewise affirms effectiveness, *"I would give you between 8.5 and 9 out of 10,"* while acknowledging there is *"always room for improvement."*

Taken together, these statements characterise Theme 1 as the reliability of routine, two-way operational updates, with occasional gaps flagged for follow-up.

The existing research related to LSQ is also validated with facts from primary research. A systematic review and qualitative interviews identified communication attributes like responsiveness, quality of personal contact, and customer concern as the most frequently mentioned attributes of LSQ, overshadowing other attributes (Arabelen & Kaya, 2021). These authors also mention process-oriented attributes like order accuracy and handling of

discrepancies, time-related attributes like punctuality and lead time, as quality factors that consistently interact with communication (Arabelen & Kaya, 2021). Most importantly, the findings show a customer-oriented communication shift over the years and empathy as crucial, which is why respondents associate frequent open communication and immediate notifications of service delays with high service performance (Arabelen & Kaya, 2021).

On the other hand, Participant 4 has provided the most dominant proof that active and proactive operational communication, availability, and quick hold notifications are the most valid indicators of perceived effectiveness. This is in line with the LSQ findings that highlight the quality of communication as one of the most important factors in the satisfaction of service users in logistics (Arabelen & Kaya, 2021).

Theme 2: Proactive change communication and strategic engagement

Across the interview responses, the strongest statement under this theme came from Participant 8, who linked retrospective notification of a strategic channel change to a breakdown in trust and planning. As P8 puts it, *"There have not been many recent product updates shared with us… For instance, we were informed retrospectively about a shift from being the sole distributor in our market to now being one of several distributors. This kind of change should ideally be communicated proactively."*

This testimony directly connects the timing and framing of strategic information with relationship quality, making it the clearest evidence that customers evaluate communication not only on frequency, but on anticipatory, participative engagement when changes have strategic effects. Participant 5's practical suggestion reinforces the same point about visibility: *"Some shipping lines provide daily updates on the status of each shipment… You can simply check the system to see the current and previous day's status. That is the kind of communication effectiveness and visibility we would like to see implemented."*

The literature supports these views. Gao *et al.* (2022) show that early initiation and response speed in recovery communications significantly improve relationship quality and loyalty by signalling courtesy, honesty and respect, and by containing downstream dissatisfaction.

Their revised service-recovery cycle argues that proactive initiation before or as issues emerge, followed by timely responses and appropriate follow-up, strengthens trust and satisfaction, both central to relationship marketing outcomes (Gao *et al.*, 2022).

Applied here, proactive disclosure of strategic changes, plus cadence-based visibility tools such as daily status dashboards, would function as *"early initiation"* and *"rapid response"* mechanisms that preserve perceived fairness and enable joint planning, particularly when changes affect channel roles or product portfolios. In short, proactivity and structured visibility are not cosmetic; they are relationship capabilities that reduce negative word-of-mouth risks and help customers keep promises to their own clients (Gao *et al.*, 2022).

4.2.6 Question 6: In what way/s could external communication be improved to enhance customer experience?

Question 6 aimed to determine the participants' recommendations on improving external communication to enhance the customer experience. The responses are provided in **Annexure D5**.

(i) Categorisation reduction

Using thematic analysis, the dataset for Question 6 was reduced to manageable categories and displayed in **Annexure D5**, with verbatim transcriptions from the interview participants.

(ii) Theme reduction

The reduction progressed from categories to themes. The relationships among categories were examined and grouped where appropriate. The resulting themes for Question 6 are displayed in **Table 7**.

Table 7: Reduction from Categories to Themes (Question 6)

Categories	Themes
Infrastructure and Technology (2) Strategy (1) Communication Channels (2) Location (2) Innovation (2) Customer engagement (1) Market Visibility (2) Supplier involvement & collaboration (1)	(1) People and Processes (2) Systems and Channels

Overlook opportunities (2) Communication Channels (2) Product Information & Reviews (1) Market Visibility (2) Structured and frequent communication (1) Supplier involvement & collaboration (1) Structured and frequent communication (1) Product Information & Reviews (1) Strategy (1) Stakeholders (1) Customer engagement (1) Structured and frequent communication (1) Product Information & Reviews (1) Capacity (2) Supplier involvement & collaboration (1) Innovation (2) Infrastructure and Technology (2) Communication Channels (2) Stakeholders (1) Product Information & Reviews (1) Structured and frequent communication (1) Product Information & Reviews (1) Structured and frequent communication (1) Product Information & Reviews (1) Market Visibility (2) Communication Channels (2) Stakeholders (1) Supplier involvement & collaboration (1) Structured and frequent communication (1) Product Information & Reviews (1) Strategy (1)	

(iii) Theme discussion

Theme 1: People and processes

Among the interviewees, Participant 3 provides the most insightful and structured view on the need for systematic communication processes to enhance the customer experience. P3

emphasised that *"an effective communication system should be two-way, consistent, and structured. It should include regular evaluations to review performance… creating a predictable, structured framework where all parties know when communication and review will take place."* This statement best captures the operational rhythm that customers expect, shifting communication from reactive exchanges to predictable, process-driven interactions. Participant 2 reinforced this by suggesting monthly virtual meetings *"no longer than an hour, to catch up on key matters such as stock availability, pricing, and marketing efforts,"* demonstrating that even short but structured sessions can significantly improve alignment.

The literature backs up this concentration on service process formalisation. According to Bitner *et al.* (2007), service blueprinting is a technique for service process mapping that incorporates customer actions, onstage and backstage employee actions, and support processes in a sequential diagram. By detailing these interdependencies, communication breakdowns can be recognised, responsibility for touchpoints can be assigned, and collaboration between sectors can be facilitated. Efficiency is enhanced as this visibility fosters process reliability and consistency in experiences that are delivered (Bitner *et al.*, 2007:3-4). Communication managed in this way is not merely a service process; it is a blueprint, and each interaction in it is designed to support the value proposition from the customer's side (Bitner *et al.*, 2007:6-8).

Applying this to the interview findings, improvements in communication should entail the establishment of regular, structured meetings, whether monthly or quarterly, that are purposeful with defined objectives and expectations of accountability for action. Furthermore, mapping other internal processes that support external interactions (backstage support processes) is vital. This allows internal communication processes to meet external customers, as Bitner *et al.* (2007) suggest that the service delivery integration across internal actors improves the overall system. This is an internal efficiency as well as an external perceived quality gain (Bitner *et al.*, 2007:10–12).

In short, Participant 3 related focus on predictable, two-way systems in communication is consistent with the service blueprinting principle of people and process integration with customer touch point. Together they demonstrate that communicating with customers externally starts with internal processes and systems, defined responsibilities, structured communication, and ownership of processes able to deliver high customer service quality consistently.

Theme 2: Systems and channels

The most compelling insights for this theme come from Participant 4, who highlighted the importance of consistency and dependability in service delivery. P4 stated that *"our biggest expectation is consistency in how issues are resolved, not just quick fixes. We need to trust that every order, every delivery, will be managed with the same level of attention. When there's inconsistency, it creates uncertainty, and that affects how we plan for the next order."* Similarly, Participant 1 noted that *"service reliability over time builds the relationship. If communication or delivery performance fluctuates, it's difficult to maintain confidence in long-term collaboration."* These reflections reinforce that customers equate service consistency with reliability, and that this directly influences their willingness to continue doing business with a supplier.

Such relationships in LSQ and relationship continuity in industrial markets are also empirical in Lee and Kim (2008). Service quality consistency and quality of service people are the key LSQ indicators in the industrial buying context that stimulate customer satisfaction and repurchase intention (Lee & Kim, 2008:68-70). They also point out that consistency in service and in products delivered, in discrepancy resolution, and service personnel are essential for sustained trust and hence retention of business (Lee & Kim, 2008:71-73).

Lee and Kim also found that service quality indicators and customer satisfaction are directly related, in which satisfied customers tend to repurchase. In other words, organisational consistency and relationship quality are achieved simultaneously, which confirms the interdependence of these outcomes.

Taking everything into account, customers view service consistency as a sign of competence and professionalism. This means that consistency should not be viewed as an operational objective, but rather as a management approach in relationship building and retention. Inconsistent service delivery increases perceived risk and can quickly undo trust developed over years of partnership. This is especially true for suppliers in industrial sectors that have customers with high service dependencies, such as agrochemical distributors. When these customers require uniform service quality across orders, personnel, and delivery cycles, it becomes a major factor of service repurchase and relationship consolidation.

4.2.7 Question 7: How do customers generally respond to the company's handling of complaints/after-sales service?

Question 7 examined participants' observations of customer responses to the company's complaint handling and after-sales service. The responses are provided in **Annexure D6**.

(i) Categorisation reduction

Using thematic analysis, the dataset for Question 7 was reduced to manageable categories and displayed in **Annexure D6**, with verbatim transcriptions from the interview participants.

(ii) Theme reduction

The reduction progressed from categories to themes. The relationships among categories were examined and grouped where appropriate. The resulting themes for Question 7 are displayed in **Table 8**.

Table 8: Reduction from Categories to Themes (Question 7)

Categories	Themes
Proactive management and corrective action (1) Quick response time (1) Pricing adjustments and financial implications (2) Communication (1) Strategy Positive (2) Positive (2) Improvement opportunity (2) Product quality and performance (2) Technical support, site visits and Root Cause identification (1) Proactive management and corrective action (1) (Downstream) Customer relationship impact (1) (Upstream) Customer relationship impact (1) Positive (2) Quick response time (1) Technical support, site visits and Root Cause identification (1) (Upstream) Customer relationship impact (2) Proactive management and corrective action (1) Communication (1)	(1) Responsiveness and Issue resolution (2) Product and Service Quality Assurance

Supply chain & logistics (2) Pricing adjustments and financial implications (2) Technical support, site visits and Root Cause identification (1) Quick response time (1) Proactive management and corrective action (1) (Upstream) Customer relationship impact (1) Location and Infrastructure (1) Communication (1) Positive (2) Positive (2) Complexity of documentation (2) Frustration & Dissatisfaction (2) Technical support, site visits and Root Cause identification (1) Communication (1) (Upstream) Customer relationship impact (1) Improvement opportunity (2) Technical support, site visits and Root Cause identification (1) Product quality and performance (2) Communication (1) Proactive management and corrective action (1) (Upstream) Customer relationship impact (1) Positive (2) Technical support, site visits and Root Cause identification (1) (Downstream) Customer relationship impact (1) Quick response time (1) Product quality and performance (2) Positive (2) Technical support, site visits and Root Cause identification (1) Proactive management and corrective action (1) (Upstream) Customer relationship impact (1) Collaboration (1)	

(Downstream) Customer relationship impact (1)	

(iii) Theme discussion

Theme 1: Responsiveness and issue resolution

Across the interview responses, Participant 4 gives the strongest, most concrete account of why fast, well-structured responses matter. Participant 4 describes two operational arenas, logistics and technical support, and note that the logistics team is *"helpful, responsive, and quick to resolve queries or problems".* On the technical side, they recall that when a customer raised a query, they escalated it and the technical representative *"responded promptly and professionally".* When urgency was high, *"the technical team [made] direct contact with the customer the same day,"* with only occasional slowdowns due to remoteness, after which *"an on-site meeting… resolved the matter effectively,"* preserving loyalty.

These remarks crystallise the theme: customers assess the quality of complaints by how fast, how competent, and how thorough they are with their follow-up actions, especially when they resolve an issue by providing hands-on, technical, and field support for a quick resolution.

Central arguments in the literature on complaint handling and service recovery explain the behaviours that build trust. Literature claims that effective complaint addressing and service recovery improve customer satisfaction, and subsequently customer loyalty and retention, connectedly, on the satisfaction path (Adzhigalieva *et al.*, 2022). More specifically, recovery attributes such as response time, offering compensation or corrective action, providing an apology and do so initiate the recovery process early determine customers' satisfaction of distributive, procedural, and interactional justice, which positively affect satisfaction and downstream outcomes (Adzhigalieva *et al.*, 2022). Where in organisations, customers perceive the process to be recovery and communication is prompt, recovery is initiated proactively, and satisfaction levels are higher, and are more likely to continue the relationship (Adzhigalieva *et al.*, 2022).

The findings above explain why and how Participant 4's testimony describes a high-maturity response system, a seamless experience that focused on rapid acknowledgement, direct and expert contact, and on-site intervention when needed. Targeted and timely follow-up, which centres on response speed and clarity of the process, explains why occasional connection or travel delays did not derail the experience. Additional testimonies support this mechanism. For instance, Participant 1 describes the experience as having "real-time" updates and instantaneous adjustments in credit and pricing, while Participant 8 describes the supplier "having the triad" with

the distributor and end user as also indicative of strong recovery strategies in which the dissatisfaction is contained and kept from the supplier.

As for Participant 4, his comment stands out the most as it associates the prompt and proficient intervention along with the onsite technical involvement from the site with the quick resolution and the receipt of loyalty which preserves it, reflecting exactly the documented evidence which suggests that the proficient complaint resolution increases satisfaction and through that, the loyalty and the retention is also anchored (Adzhigalieva *et al.*, 2022).

Theme 2: Product and service quality assurance

Among the interviewees, Participant 4 provided the strongest statement connecting first-time-right quality and fast correction to customer satisfaction. Participant 4 reported that the logistics team is *"helpful, responsive, and quick to resolve queries or problems,"* and, crucially for quality assurance, that when a customer raised a technical issue, it was escalated and the specialist *"responded promptly and professionally,"* sometimes making *"direct contact with the customer the same day,"* after which *"an on-site meeting… resolved the matter effectively."*

These comments also reveal the two sides of the theme relating to errors being addressed with accurate and good condition orders, and when mismatches occur, performing diagnostics and corrective actions quickly, and loop closure movements to ensure the assurance.

This is exactly the mechanism that the 2022 paper by Masudin *et al.* focuses on using a Kano model and QFD, they show that accuracy of orders, the standing condition of the orders, timely processing of orders, and efficient processing of discrepancies with orders are key factors of order quality and customer satisfaction. For instance, the accuracy of orders, and the condition they are in when they are delivered, are what Kano terms must-be attributes, that if achieved, customers become dissatisfied, and if they are not achieved, customers become dissatisfied. Whereas, timely delivery of orders and effective handling of order-mismatch discrepancies are what can be termed as one-dimensional attributes, where customer satisfaction is added on as processing and enhancement of orders is made more efficient (Masudin *et al.,* 2022). Therefore, customers expect orders to be fulfilled accurately on the first attempt, without any damaged or missing items. Moreover, customers appreciate suppliers who promptly fix errors, communicate clearly, and prevent the same mistakes from happening (Masudin *et al.,* 2022).

Integrating the interview and literature, three implications emerge. First, design for first-time-right: tighten picking accuracy, pre-dispatch checks, and packaging integrity to minimise rework.

Second, when defects or mismatches are reported, execute a rapid recovery routine: immediate acknowledgement, same-day triage by the right expert, and visible corrective action, as illustrated by Participant 4's same-day specialist contact and on-site closure. Third, close the loop with root-cause feedback that prevents repetition, since Kano/QFD logic emphasises building these critical LSQ attributes into process design rather than relying on after-the-fact heroics (Masudin *et al.*, 2022). In short, preventing errors and fixing them fast are complementary capabilities that stabilise satisfaction and protect loyalty, precisely as the participants describe.

4.2.8 Question 8: What elements of service delivery do you believe are most valued by customers?

Question 8 aimed to identify the elements of service delivery that customers most valued, such as responsiveness, reliability, transparency, and technical support. The responses are provided in **Annexure D7**.

(i) Categorisation reduction

Using thematic analysis, the dataset for Question 8 was reduced to manageable categories and displayed in **Annexure D7**, with verbatim transcriptions from the interview participants.

(ii) Theme reduction

The reduction progressed from categories to themes. The relationships among categories were examined and grouped where appropriate. The resulting themes for Question 8 are displayed in **Table 9**.

Table 9: Reduction from Categories to Themes (Question 8)

Categories	Themes
Communication (2) Product reliability, quality, compliance and service delivery (1) (Upstream) Customer relationship impact & trust (2) Product knowledge & Technical advice (2) (Downstream) Customer relationship impact & trust (2) Sales, incentive & performance (2)	(1) Product performance and supply reliability (2) Communication, expertise and commercial support

(Upstream) Customer relationship impact & trust (2) Product reliability, quality, compliance and service delivery (1) Product knowledge & Technical advice (2) Supply Chain (Context) (1) Delivery lead times (1) (Upstream) Customer relationship impact & trust (2) Payment terms & Credit Facilities (2) Stock availability (1) Communication (2) (Upstream) Customer relationship impact & trust (2) Pricing (2) Strategic Positioning (2) Delivery lead times (1) Product reliability, quality, compliance and service delivery (1) Third parties (1) Delivery lead times (1) Product reliability, quality, compliance and service delivery (1) (Downstream) Customer relationship impact & trust (1) Research & Development (1) Product reliability, quality, compliance and service delivery (1) Delivery lead times (1) (Upstream) Customer relationship impact & trust (1) Payment terms & Credit Facilities (2) (Downstream) Customer relationship impact & trust (2) Product knowledge & Technical advice (2) Payment terms & Credit Facilities (2) Supply Chain (Context) (1) (Upstream) Customer relationship impact & trust (2) Communication (2)	

(iii) Theme discussion

Theme 1: Product performance and supply reliability

The strongest insights for this theme come from Participant 1 and Participant 5, who link consistent product quality and dependable delivery to customer confidence and operational stability. Participant 1 explained that *"we have confidence in the quality, packaging, presentation, and compliance of the products supplied by Company X. This trust makes managing the product portfolio within Country Y far easier compared to other suppliers."* Similarly, Participant 5 stressed that *"orders should be supplied in full and on time… The key expectations are timeliness, accuracy, and product quality. Defective products should never be sent, and the supplier should identify and address defects before dispatch."* These statements clearly demonstrate that customers value reliability across the entire supply chain, from product formulation to order fulfilment, and that consistency builds trust and simplifies downstream operations.

Restuputri (2021) have conducted a study which illustrates this very well. They applied Kansei engineering to assess emotional responses to LSQ attributes, and established that responsiveness, order fulfilment, order accuracy, and condition of products received were positive drivers of customer satisfaction and loyalty. The authors posit that there is service delivery that is reliable and positively impacts emotional responses of confidence, assurance, and comfort, emotions that are needed to foster long-term relationships. They explain that in a disruption scenario, service delivery reliability is the main determinant of satisfaction because customers perceive uninterrupted service to mean service delivery competence and service delivery reliability (Restuputri *et al.*, 2021).

From the integration of the above two views, in-service delivery, three attributes stand out:

1. Product compliance – Ensuring that there is quality and compliance with all requirements in each batch and shipment.
2. Delivery accuracy – Provision of orders within the timelines and quantifies promised, complete orders with no omissions, and no changes to the order.
3. Quality assurance – Settlement of defects prior to shipment, thus preventing disruption downstream.

These findings indicate that customers associate performance and reliability with trustworthiness. When suppliers are consistent with their delivery and provide communication transparency, they not only meet technical requirements but also provide emotional assurance, which fosters satisfaction and loyalty (Restuputri *et al.*, 2021).

Theme 2: Communication, expertise and commercial support

Within this theme, Participant 2 provided the strongest illustration of how customers value knowledgeable, well-supported interactions around the product. P2 emphasised that *"the first key area is product knowledge. Company X has invested considerable effort in ensuring that sales representatives understand the products thoroughly. They have taken time to conduct product training and knowledge sessions, which have strengthened our ability to sell confidently and provide accurate information to customers."* This was reinforced by P2's description of incentive programmes and relationship-building efforts that *"have been particularly motivating"* and have helped create *"a level of trust and collaboration that supports the sales process."* Taken together, these comments highlight that customers do not only want a product that works, they want a partner whose communication, expertise and commercial support make it easier to create value in their own markets.

These findings are also similar to Human *et al.* (2020), which concerns B2B customer experience. It reveals that the quality of episodes of sales interaction, in particular the salesperson's competence, responsiveness, and relational behaviour, directly affects customer satisfaction and loyalty intentions. In Human *et al.* (2020) experience – satisfaction – loyalty model, customers, in the presence of a positive interaction experience, are more inclined to make recommendations to the supplier. However, in the presence of low-quality interaction, this link is eroded, or made to be highly segment specific, and in some instances not make any recommendation at all. In the interviews conducted, customers also reported positive experiences resulting from clear communication, credible technical advice, visible field support and fair commercial mechanisms, such as sales incentives and credit facilities. Participant 2 is an example of how confidence at the point of sale and deeper relationship commitment over time is reflected by training, support tools with the brand, and incentives. It highlights the need to not only build efficient operations in the background to service value for Company X, but also to build quality communication, expert sales teams, and provide commercially supportive, practical tools.

4.2.9 Question 9: Can you share an example where service-related improvements were made in response to customer feedback?

Question 9 aimed to obtain concrete examples where service-related improvements were implemented in response to customer feedback, noting the change and the resulting outcomes. The responses are provided in **Annexure D8**.

(i) Categorisation reduction

Using thematic analysis, the dataset for Question 9 was reduced to manageable categories and displayed in **Annexure D8**, with verbatim transcriptions from the interview participants.

(ii) Theme reduction

The reduction progressed from categories to themes. The relationships among categories were examined and grouped where appropriate. The resulting themes for Question 9 are displayed in **Table 10**.

Table 10: Reduction from Categories to Themes (Question 9)

Categories	Themes
Supply chain and logistics (1) Strategic Planning & Growth (2) Effective Communication & Information sharing (2) Product reliability, quality, compliance (1) (Upstream) Customer relationship impact (1) Adaptability, flexibility and responsiveness (1) Price (1) Effective Communication & Information sharing (2) Competitiveness (2) Operational support (1) (Downstream) Customer relationship impact & trust (1) Adaptability, flexibility and responsiveness (1) Operational support (1) Collaboration (2) Competitiveness (2) Price (1) Strategic Planning & Growth (2) Adaptability, flexibility and responsiveness (1) (Downstream) Customer relationship impact & trust (1) Strategic Planning & Growth (2)	(1) Operational reliability and enablement (2) Strategic collaboration and communication for growth

(Upstream) Customer relationship impact (2) Collaboration (2) Frequency of visits (2) Strategic Planning & Growth (2) Product reliability, quality, compliance (1) Operational support (1) Adaptability, flexibility and responsiveness (1) Supply chain and logistics (1) (Upstream) Customer relationship impact (1) Operational support (1) Credit Limit (1) Adaptability, flexibility and responsiveness (1) (Upstream) Customer relationship impact (1) Product reliability, quality, compliance (1) Import process (1) Supply chain and logistics (1) Adaptability, flexibility and responsiveness (1) SADC Certification (1) Operational support (1) Price (1) Strategic Planning & Growth (2) Effective Communication & Information sharing (2) Strategic Planning & Growth (2) Adaptability, flexibility and responsiveness (1) Supply chain and logistics (1) Credit Limit (1) Operational support (1) Collaboration (2)	

(iii) Theme discussion

Theme 1: Operational reliability and enablement

Across the interview responses, the strongest demonstration of operational improvements made in response to customer feedback comes from Participant 1, who provided detailed examples showing how Company X translated feedback into tangible service enhancements. Participant 1

noted that *"there has been noticeable improvement in areas such as product supply coordination, compliance with local regulations, and updates on packaging, labelling, and marketing materials… feedback we provided as a customer has been acted upon promptly and effectively."* This statement stands out because it highlights multiple upstream and downstream changes, supply, compliance, product presentation and responsiveness, that directly affect day-to-day operational ease. These improvements align closely with the dominant code pattern for this theme: logistics fixes, quality interventions, and support activities that reduce customer effort and restore confidence.

Other participants echoed similar experiences. Participant 5 described how packaging concerns and supply gaps were addressed rapidly, explaining that *"Company X responded promptly and made the necessary adjustments… [and] assisted us in sourcing stock from a neighbouring region,"* demonstrating responsiveness and problem-solving. These examples show that customer feedback is not only acknowledged but operationalised, strengthening reliability across the supply chain.

Venter and Smit (2018) showed customer dissatisfaction tied to operational failures in last-mile logistics in South Africa. Customers expressed dissatisfaction when there were problems with product quality, packaging, stock availability, delivery delays, and order inaccuracies (Venter & Smit, 2018, 4-6). As Venter and Smit explain, logistics reliability is about having the right product in the right condition and delivered on time and with the right invoice, as that will drive customer satisfaction and loyal buying behaviour. If there are issues in the supply chain and those issues are remedied quickly, customer frustration will decrease, and trust will be re-established (Venter & Smit, 2018, 55-56).

Interviews and literature showed that Company X's actions of closing packaging, supply, registration, compliance, pricing, and import streamlining were operational pain points in the industry that caused dissatisfaction. The customers in the study dissatisfied with the lack of logistics control and reliability, were also dissatisfied with operational responsiveness to disruptions, confirming the study's findings.

The analysis reinforces that operational reliability is achieved when customers do not experience friction and provide feedback that encourages service delivery improvements.

Theme 2: Strategic collaboration and communication for growth

Within this theme, Participant 3 provided the strongest insight into how Company X has acted on customer feedback to reshape processes and align its operations more closely with customer needs. Participant 3 explained that *"Company X took our feedback seriously… They reviewed their processes around import challenges, documentation, and approvals, and they made improvements that helped remove delays on our side."* This was supported by their additional observation that *"stock distribution was adjusted after we raised concerns about late arrivals,"* highlighting how the company responded to operational bottlenecks raised by customers. These comments show that feedback is not simply acknowledged but systematically incorporated into process changes that improve reliability, reduce administrative friction and enhance customer satisfaction.

In their recent work, Tay and See (2022) analysed the improvements made across various areas and explained them conceptually. The importance of listening to the voice of the customer (VOC) and its role as a critical success factor is demonstrated in Tay and See's (2022) work. Service improvement applying Lean principles requires listening to and acting on customer value. The Lean principles also advocate the removal of waste and improvement of operational efficiencies to align with demand. The authors demonstrate that if organisations use VOC mechanisms early in their processes, they will experience fewer errors, quicker response times and output that is a closer fit to the end users' desired outcomes (Tay & See, 2022:303-305). One of their key arguments is that customer-driven change of the processes enables organisations to eliminate non-value-adding steps, achieve greater ease of access and improvements in process flow, and build clear processes that contain the desired outputs and reduce the occurrence of the same problem (Tay & See, 2022:304-307).

In light of those findings, Company X's initiatives of improving documentation flows, altering stock allocation methodologies, refining approval processes, and adjusting to an on-the-go supply-chain obstacle response align with the type of process improvement described in Lean literature as needs-driven (as cited in Participant 3). There is consensus from both Participant 3 and the document that real improvement is achieved when constructive operational re-design, rather than when the simple removal of one or more process steps, is undertaken, based on feedback from frontline personnel who experience delays, mismatches, or inefficiencies.

This theme indicates that Company X is enhancing services based on VOC. Listening to customers helps Company X increase operational effectiveness and improve customers' perceptions of service reliability. This fosters trust and collaboration, showing the benefits of operational learning within the customer value stream.

4.2.10 Question 10: What changes would you recommend to improve customer satisfaction across the company?

Question 10 gathered participants' recommended changes to improve customer satisfaction across the company, prioritising systemic, process, and capability enhancements. The responses are provided in **Annexure D9**.

(i) Categorisation reduction

Using thematic analysis, the dataset for Question 10 was reduced to manageable categories and displayed in **Annexure D9**, with verbatim transcriptions from the interview participants.

(ii) Theme reduction

The reduction progressed from categories to themes. The relationships among categories were examined and grouped where appropriate. The resulting themes for Question 10 are displayed in **Table 11**.

Table 11: Reduction from Categories to Themes (Question 10)

Categories	Themes
Communication & Alignment (1) Dedicated key account manager (1) Supply Chain (Context) (2) Personal Touch (1) Attention to detail (1) Technical & relationship Support (1) Regular Visits (1) Competitiveness (2) Information & Knowledge Sharing (1) Strategic Planning & Innovation (2) Information & Knowledge Sharing (1) Sales and Profit (2) Pricing & Pricing Strategies (2) (Upstream) Customer relationship impact (2)	(1) People and partnership = 4 (2) Product, price and supply = 1

Competitiveness (2) (Upstream) Customer relationship impact (1) Technical & relationship Support (1) Digital Engagement and awareness platforms (1) Language localisation (1) (Downstream) Customer relationship impact (1) Personal Touch (1) Accessibility & Engagement (1) Production Planning (2) Market Needs (2) Pricing & Pricing Strategies (2) Communication & Alignment (1) Information & Knowledge Sharing (1) Production Planning (2) Pricing & Pricing Strategies (2) Competitiveness (2) Sales and Profit (2) Production Planning (2) Transport and Logistics (2) Pricing & Pricing Strategies (2) Technical & relationship Support (1) Competitiveness (2) Information & Knowledge Sharing (1) (Upstream) Customer relationship impact (1) (Downstream) Customer relationship impact Production Planning (2) Transport and Logistics (2) (Upstream) Customer relationship impact (2) Supply Chain (Context) (2) (Upstream) Customer relationship impact (2) Production Planning (2) Information & Knowledge Sharing (1) Communication & Alignment (1) Technical & relationship Support (1) (Downstream) Customer relationship impact (1)	

(iii) Theme discussion

Theme 1: People and partnership

Of all the participants, Participant 1 provided the clearest and strongest articulation of the need for strengthened people-centred practices and partnership alignment. Participant 1's contribution demonstrates a deep understanding of how human connection, communication and relationship management shape satisfaction in a relationship-driven agricultural market. P1 explained that *"it all ultimately comes down to communication… having a dedicated key account manager who can represent our requirements at group level… would make a significant difference."* P1 further described operational misalignment between group-level structures and agricultural market realities, noting that *"in our market, attention to detail and personal relationships are critical, and we can feel a communication gap within the group."* This quote highlights the central expectation shared across respondents: visible stewardship, consistent communication, and coordinated representation.

The participants' concerns are well supported in the literature. Tedja *et al.* (2024) emphasise that relationship marketing and service quality foster value on a continuum in B2B, and value satisfaction is a core determinant of relationship continuation. They argue that strong relationships in B2B, in particular, are a result of trust, clarity in communication, and relational commitment that sustain collaboration and mitigate relationship breakdown (Tedja *et al.,* 2024:1-4). The authors further explain that relationship marketing in particular, communication, and trust conflict, which enhances value and interdependence in the relationship sustain collaboration (Tedja *et al.,* 2024: 6-7).

Participant 2 reinforced the importance of people-based engagement, stating that *"on-the-ground support… has reduced somewhat over the past year,"* and that competitors are increasingly visible in the field, hosting technical sessions and crop-specific demonstrations. This underscores how field presence, technical engagement and relationship maintenance contribute directly to perceived value, which is an argument strongly supported by Tedja *et al.*'s (2024) findings that customer satisfaction increases when organisational representatives provide support, demonstrate expertise, and sustain trust through continued interaction.

The customers' interviews, coupled with the literature, indicate that customers value consistency, communication, relational continuity, and active partnership management. To build and sustain trust, satisfaction, and improve relationship outcomes, these elements of operational learning within customer value stream collaboration must improve.

Theme 2: Product, price and supply

The clearest evidence underpinning this theme emerges from Participant 3, who clearly linked customer satisfaction to the reliability, consistency and transparency of the logistics process. P3 emphasised that *"late deliveries, missing documents and variability in timelines remain our biggest pain points"* and that customers specifically need *"clear turnaround expectations and predictable movement of product across borders."* P3 further added that *"we cannot commit to our clients when we do not know when stock will arrive,"* underscoring how logistics performance directly affects service delivery in the agrochemical sector. These remarks reflect the broader consensus across respondents that customers value consistent logistics performance, stable lead times and reliable delivery outcomes.

Hui *et al.* (2025) developed an article that anchors solid theoretical reasoning on why such expectations are pivotal. Empirically examining LSQ within the four dimensions of cross border (Hui *et al.*, 2025:303-305) explains that the information services of delivery, efficiency of return logistics service, and cross border shopping experience are the strongest predictors of satisfaction. The theorists emphasised that the cross border customers are extremely sensitive to transparency, tracking visibility, and procedural certainty and that these attributes diminish the uncertainties spawned by customs clearance, prolonged transits, and fluctuating border processing standards. As delivery stability declines, so too does customer confidence and satisfaction (Hui *et al.*, 2025:305-307).

Participants insights strongly mirror these findings. The agrochemical customers engaging with Company X operate within seasonal windows, regulatory deadlines and crop-specific timing constraints. Uncertainty around logistics therefore has amplified commercial consequences. As Participant 3 noted, *"predictability outweighs speed… even if delivery takes long, we just need it to be consistent."* This reflects Hui *et al.*'s argument that, in cross-border settings, stability and transparency matter more than absolute speed because they allow customers to plan, manage risk and make informed decisions.

In summary, Theme 2 shows that people appreciate the reliability of logistics, accuracy of documentation, predictability of borders, and the flow of information. Additional improvement in these would increase the satisfaction of customers and amplify the capabilities of the services in the field, especially in the case of time-sensitive agricultural businesses.

4.3 Chapter summary

The chapter presented the results of the qualitative interviews and the findings for each of the 10 research questions. In respect to each question, categories were formulated from the transcripts and later condensed to themes, supplemented by illustrative quotations from the participants. The aggregated evidence suggests that customer satisfaction within the agrochemical manufacturing sector in South Africa develops from a combination of customer operational dependability and customer relationship management. Customers emphasised the significance of reliable supply, documentation, lead times, product assortment, and pricing. At the same time, they valued the presence of communication, technical and relationship support, field coordination, and paired partnership structure. These elements formed the foundation of the integrated discussion, conclusions and recommendations presented in Chapter 5.

CHAPTER 5: MAIN FINDINGS, CONCLUSION AND RECOMMENDATIONS

5.1 Introduction

This chapter contains the primary conclusions of the study, integration of the conclusions concerning the purpose and objectives of the study, and the recommendations from practice and future research. The research investigation shows that customer satisfaction within the agrochemical manufacturing industry in South Africa is greatly affected by operational dependability and relationship management with the customer in terms of supply reliability, document accuracy, lead time, product assortment, pricing, and communication partnership strategy technical support.

This chapter reviews the shortcomings of the study, discusses the achievement of research objectives, provides summary expectations based on empirical results, then presents recommendations based on the literature review, provides the researched empirical findings, presents overall recommendations, provides directions for future research, and includes a concluding section.

5.2 Limitations

Like every research study, there were some limitations in this particular one, which should be borne in mind when interpreting the findings. First, the study obtained empirical data from a single South African agrochemical manufacturing company and employed a qualitative design involving a small, purposively selected and relatively homogeneous group of internal employees. This approach strengthened contextual depth and provided rich, detailed insight into internal operational and service realities, but it limits statistical generalisability to the broader agrochemical industry. The intention of the study was therefore analytical transferability, meaning the findings can inform similar settings where readers judge the relevance of the context and mechanisms described, rather than being generalised numerically.

Second, the study explored internal stakeholders' perceptions of factors affecting customer satisfaction and did not include direct interviews with external customers. As a result, the findings reflect how employees interpret customer needs, expectations and pain points, which may differ from how distributors or farmers experience service reliability in practice. This limitation is

important, because internal accounts can over emphasise operational explanations and under represent customer level prioritisation of service elements.

Third, the data were obtained at a single point in time. Given the seasonal nature of agrochemical demand, shifting regulatory requirements and the evolving realities of supply chain disruptions, perceptions and operational constraints may vary across different cycles and peak periods. The findings should therefore be interpreted as a snapshot of the organisational environment during the study period, rather than a stable representation across all seasons.

Finally, as is the case with qualitative research, the researcher's professional background and insider position may have influenced the framing of interview questions, the interpretation of responses and decisions during coding, even though measures were taken to support credibility through a structured interview guide, systematic thematic analysis, the use of verbatim transcripts, and the maintenance of an audit trail. Interpretive bias can be reduced through these steps, but it cannot be fully eliminated. Future research could strengthen methodological robustness through triangulation, for example incorporating distributor or farmer interviews, documentary evidence, operational performance records, or a longitudinal design to test whether the identified drivers remain consistent across seasonal cycles and operational disruptions.

5.3 Achievement of aims and specific objectives

5.3.1 Achievement of the research aim

To investigate the perception of employees of a South African agrochemical manufacturing company on the internal operational and service-related determinants of customer satisfaction, the author conducted the study. This objective was accomplished, as described in Chapter 3, via the expert stakeholder interviews, and the author's systematic thematic analysis of the resultant data.

While conducting the ten qualitative interviews, the participants described various factors that affect a customer's satisfaction and operational consistency. Furthermore, they elaborated on the intra and inter supply chain communication, the technical and relational support a company provides, and the partnership of the customers. This research aim was satisfactorily addressed.

5.3.2 Achievement of the primary objective

To review the interviews conducted with the representatives of various departments concerning the internal operational and services elements affecting customer satisfaction in the agrochemicals manufacturing sector of South Africa. The interviews illustrated that the participants perceived active internal production control, inventory management, document control, logistics and integration with other function coordination, and, along with closure and communication, the technical support of complaints, and support of customer complaints and support, support, and support as pivotal in determining customer experience towards the company.

Thus identifying and elaborating these factors in Chapter 4 of the study, constituted an achievement of the primary goal, which also offered the factors that explain the internal dimensions of customer satisfaction and also dissatisfaction in the company.

5.3.3 Achievement of the secondary objective

Secondary Objective 1: To assess in what way do internal operational systems affect customer satisfaction. This objective was achieved in terms of the participants' opinions concerning internal operational hitches of production, inventory, document management control, visibility, as well as interdepartmental coordination. The results indicated that these systems have malfunctions which translate into customer-level satisfaction and trust. There are delivery delays, stock-out, and changes without prior notice.

Secondary Objective 2: Investigating the consequences of supply chain efficacy on customer expectations and service fulfilment. Multiple responses indicated efficient supply chain management as an important variable. Participants commented on the effect of the company's lengthy lead times, poor logistical capabilities, limited export processes, and insufficient buffer stock on the company's ability to satisfy customer expectations, especially during peak seasons. These comments proved that service fulfilment is undermined and customer dissatisfaction is observed due to supply chain constraints, thus meeting Secondary Objective 2.

Secondary Objective 3: To determine the role of communication and information sharing on the customer perception. An analysis of the communication questions indicated the survey respondent's perception was greatly impact by the communication timeliness, regularity, clarity, consistency, and transparency of information regarding the status of the products, changes, delays, or documentation requirements. They reported disengaged or disjointed communication

to be the primary cause of frustration and difficulty in planning. In contrast, they reported easy communication, proactive updating, clear communication, and engagement as positively supporting the relationships. Hence the information.

Secondary Objective 4: Examine the impact of service delivery and post-sale support on sustaining customer satisfaction and customer loyalty over a period of time. The results related to complaints handling, and post-sale assistance and support, and those related to the management of customer relationships, indicated that the customers appreciated, and therefore, the customers cared about, the demonstrable ownership, country of origin for sale, management, persistence, and technical support and non-stop communication for relationships in the management of customer-oriented service relationships. Customer loyalty was attributed to the company that responded to the customers' complaints, and customer service problem resolving. The study therefore analysed the effects of service delivery and post-sales support on the customers' satisfaction and customer loyalty over a period of time and met Secondary Objective 4.

5.4 Expectation summary

The expectation derived from the literature and problem statement was that operational inefficiencies, supply chain constraints, communication shortcomings, and service delivery gaps would lower customer satisfaction in the South African agrochemical manufacturing context, and that improvements in these areas would positively alter customer experience and loyalty.

Most of the evidence confirmed these expectations. Interviewees associated customers' dissatisfaction with production and stocking issues, lack of logistics, long and uncertain lead times, document errors and reactive informational flows. In this context, they also noted that customers appreciate the company’s efforts in maintaining reliable product availability, effective and timely communication, active complaint management and provision of complaint-related technical assistance and relationship support. The study also noted the internal partnership structure and alignment, thus adding depth to the initial expectation and showing that active operational reliability and quality of relationships are interdependent in determining the level of customer satisfaction.

Table 12 summarises the main conclusions drawn from each interview question and shows how these relate to the primary and secondary objectives of the study.

Table 12: Conclusions drawn from the Questions

Questions	Objective solutions / themes	Specific objective
1. In your experience, which internal operational challenges most often impact customer satisfaction?	Participants highlighted internal bottlenecks in production planning, inventory visibility, documentation and interdepartmental coordination as key internal drivers of customer dissatisfaction, because these issues manifest at the customer as delays, uncertainty and errors in orders.	SO, 1,2
2. How do production planning or scheduling delays influence customer perceptions of reliability?	Production and scheduling delays were perceived to create uncertainty, missed commitments and last-minute changes for customers, which erode perceptions of the company's reliability and professionalism, even when the product itself is trusted.	SO, 1,2
3. What supply chain obstacles have you encountered that lead to customer dissatisfaction?	Supply chain obstacles such as long lead times, constrained logistics capacity, export and documentation issues and limited buffer stock lead directly to late deliveries and stock shortages, which in turn place pressure on customer relationships and seasonal planning.	SO, 1,2
4. How do delivery delays or product unavailability typically affect customers' trust in the company?	Repeated delivery delays and product unavailability weaken customers' trust and encourage risk-mitigating behaviour, for example diversifying to alternative suppliers, even where long-standing relationships exist and product performance is valued.	SO, 2,4
5. How would you assess the company's effectiveness in communicating product updates or service changes to customers?	Communication about product availability, changes, delays and documentation requirements was described as fragmented and often reactive, with different departments sometimes sending inconsistent messages, which undermines customers' planning certainty and confidence.	SO, 3
6. In what way/s could external communication	Participants recommended more proactive and transparent communication, clearer ownership of	SO, 3,4

Questions	Objective solutions / themes	Specific objective
be improved to enhance customer experience?	customer communication (for example through key account managers), and more consistent documentation and order-tracking information to support customers' decision-making.	
7. How do customers generally respond to the company's handling of complaints/after-sales service?	Customer responses to complaints and after-sales issues were seen as strongly dependent on the speed, visibility and ownership of follow-up; where responses are slow or issues recur, frustration increases and perceptions of service quality decline.	SO, 1,4
8. What elements of service delivery do you believe are most valued by customers?	Customers were perceived to value dependable product availability, predictable lead times, accurate documentation, competitive and transparent pricing, and strong technical and relationship support, rather than product performance alone.	SO, 2,3,4
9. Can you share an example where service-related improvements were made in response to customer feedback?	Where the company acted visibly on feedback, for example by improving documentation flows, clarifying processes or adjusting lead times and points of contact, customers responded positively, which reinforced the importance of responsiveness and continuous improvement for loyalty	PO SO, 1,3,4
10. What changes would you recommend to improve customer satisfaction across the company?	Suggested changes clustered around two broad areas: people and partnership (dedicated key account management, better cross-functional alignment, regular on-farm or in-market engagement) and product, price and supply (more robust forecasting, inventory buffers, and clearer pricing structures). These speak directly to improving operational reliability and relationship quality.	PO SO, 1,2,3,4

5.5 Recommendations based on the literature

The critical literature review highlighted several clusters of factors that are important for customer satisfaction in logistics-intensive, B2B environments such as agrochemicals:

Logistics service quality and reliability: Research addressed several dimensions of logistics service quality model and linked to satisfaction and loyalty and discusses reliability, timeliness, information, and quality of problem solving.

Operations performance and internal process excellence: The literature on the performance of operations and supply chain integrates the concept of having consistent and reliable internal processes like scheduling, documentation, controlling the inventory, and inter-function coordination to improve client retention and loyalty.

Communication and customer relationship management: The literature on CRM and the quality of communications shows that customer satisfaction and trust, especially in times of disruption, are elevated by clear, bidirectional, and timely communication, including easy points of contact and proactive status updates.

Supply chain visibility and risk: As a result of visibility on supply chain risks, companies can address and mitigate the effects of disruption on customer relationships through more effective risk management, information sharing, early risk identification, and supply, demand, finance integration.

Partnership orientation in B2B settings: Partnering orientation in B2B: In the long term, B2B relationships and customer satisfaction are positively impacted, not through transactional selling, but through a partnership mentality, joint planning, and commercial and technical support from suppliers.

From this literature, high-level recommendations relevant to the case company include:

- Formalise and quantify dimensions of service quality in logistics such as reliability, responsiveness, information, problem solving, and so on.
- Focus on integrating internal processes, especially at the gaps between planning, production, documentation, logistics, and commercial activities.

- Improve and enhance communications with distributors through structured and systematic CRMs such as review meetings, escalation protocols, and communications during disruptions, and provide transparent information.
- Improve visibility of the supply chain by enhancing the quality of demand, inventory, and order information that is accessible by internal personnel and, in some cases, distributors.
- Expand and enhance relationships based on partnerships by aligning growth and planning conversations with key distributors while treating loyalty and satisfaction as strategic goals beyond just increasing sales in the short term.

These recommendations from the literature provide a benchmark against which the company's current practices, as described by participants, can be compared.

5.6 Recommendations based on the empirical findings

Drawing directly from the themes in Chapter 4, several practical recommendations emerge for the case company:

Strengthen cross-functional planning and alignment

- Establish a standing cross-functional planning committee that assembles planning, production, logistics, documentation, and key account management to analyse upcoming demand, and identify constraints and risks.
- Ensure that all decisions related to the order of work, work assignment, and work schedules are documented and made available to all workflows that are affected.

Improve documentation and export process reliability

- Implement documentation and checklist standardisation for domestic and export orders to decrease the number of errors and work that needs to be redone.
- Define export documentation and customs requirements roles and responsibilities to eliminate unnecessary delays that are internal to the company.

Enhance visibility of stock and lead times

- Provide internal commercial and customer-facing staff with timely and current information about stock statuses, accessible production schedules, and lead times to enable them to manage customer expectations realistically.
- To the extent possible, improve the forecasting of customer and distributor inputs to enhance the accuracy of internal planning.

Formalise complaint handling and after-sales service

- Develop a clear complaint handling process with defined timelines, responsible persons and feedback loops.
- Internally communicate this process and maintain consistent and timely handling of customer issues and complaints.

Increase field presence and technical support visibility

- Assist key account managers and technical staff with structured time to spend with distributors and, when appropriate, in the field to provide visible, accessible, and actionable advice and support.
- Utilise these visits to collaboratively analyse performance, isolate issues, and design work improvement actions.

Align pricing and product decisions with long-term relationship goals

- Ensure decisions made regarding pricing and product allocation are not only viewed from a short-term margin perspective, but rather from a longer-term trust and satisfaction level with the strategic customers.
- Communicate the rationale for difficult decisions transparently to maintain credibility.

These recommendations are rooted in the specific themes raised by participants and can be prioritised according to feasibility and potential impact.

5.7 Suggestions for further research

Several suggestions for further research build on this study as it relates specifically to the agrochemical manufacturing industry and customer satisfaction. First, this research considered the internal viewpoints as one of the single manufacturers, therefore it would be appropriate for future studies to incorporate the external customer and distributor viewpoints, as it would be helpful to understand how internal disparities on the satisfaction drivers differ from those external to the marketplace. Second, researching multiple companies and/or regions as an example that includes other agrochemical manufacturers, or the different Southern African markets would enhance the understanding of the factors that influence satisfaction on both a broader, comparative and localised, contextual basis for common and specific factors. Third, consideration of a mixed-method approach that incorporates qualitative interviewing and quantitative surveying to determine the relative importance of the various themes identified and their linkage to repeat

purchasing, share of wallet, or complaint rate outcomes. Finally, a longitudinal approach that focuses on the implementation of some of the recommended actions over time would elucidate how the internal changes to process and communication structure, coupled with relationship management, affect customer satisfaction and retention over time.

5.8 Conclusion

This section pulled together the outcomes of the literature review and empirical investigation and highlighted the study's limitations and analysed the extent to which the aim and specific objectives were met. The evidence suggests that for the case company, customer satisfaction is influenced by the interaction of the internal operational, reliability, planning and communication, product and supply performance and reliability, and supportive relationships and facilitative support.

The recommendations offered, based on both literature and empirical data, provide a practical roadmap for strengthening customer satisfaction in the company’s agrochemical manufacturing and distribution activities. While the findings are context-specific and not statistically generalisable, they offer valuable insights for practitioners and researchers interested in improving service delivery and relationship quality in similar B2B supply chain environments.

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APPENDIX A: INFORMED CONSENT

NWU Business School
North-West University
Private Bag x6001
Potchefstroom, 2520
http://commerce.nwu.ac.za/business-school

25 November
2025

To: Potential interview participant

INFORMED CONSENT TO PARTICIPATE IN AN INTERVIEW

Date: _____

Participant code: _____

Title: Investigating the Factors Affecting Customer Satisfaction in the South African Agrochemical Manufacturing Industry

Dear .....

Your participation is voluntary, and you have been invited through an independent recruitment process to ensure unbiased selection.

I am **Jacque du Plessis**, a Master of Business Administration candidate at the North-West University Business School. As part of my research, I am exploring the perceptions of internal stakeholders regarding the operational and service-related factors that influence customer satisfaction within a South African agrochemical manufacturing company.

APPENDIX B: INTERVIEW GUIDE

Semi-structured interview - questions

This interview guide aims to investigate the understanding of employees within certain departments of a South African agrochemical manufacturing company about the internal operational and service-related factors that affect customer satisfaction.
The interview will ideally be completed in 30 minutes, and it consists of 10 Questions:

Please note: The interview will be recorded.

Questions

1. In your experience, which internal operational challenges most often impact customer satisfaction?
2. How do production planning or scheduling delays influence customer perceptions of reliability?
3. What supply chain obstacles have you encountered that lead to customer dissatisfaction?
4. How do delivery delays or product unavailability typically affect customers' trust in the company?
5. How would you assess the company's effectiveness in communicating product updates or service changes to customers?
6. In what way/s could external communication be improved to enhance customer experience?
7. How do customers generally respond to the company's handling of complaints/after-sales service?
8. What elements of service delivery do you believe are most valued by customers?
9. Can you share an example where service-related improvements were made in response to customer feedback?
10. What changes would you recommend to improve customer satisfaction across the company?

APPENDIX C: LANGUAGE EDITING CERTIFICATE

RUAN FOURIE

COPYEDITING CERTIFICATE

INVESTIGATING FACTORS AFFECTING CUSTOMER SATISFACTION IN THE SOUTH AFRICAN AGROCHEMICAL MANUFACTURING INDUSTRY

by JF du Plessis

Be it hereby certified that the abovementioned mini-dissertation has been copyedited and proofread for accuracy, clarity, and proper English usage.



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APPENDIX D: QUESTION ANALYSIS

ANNEXURE D1 – Question 2

How do production planning or scheduling delays influence customer perceptions of reliability?

Participant	Transcript (Answer)	Categories	Themes
1	Well, how does production planning influence reliability? I think it's extremely important that we are all on the same page, and sometimes even the customer is not. We work in an environment where the products we supply to third parties are, in most cases, highly seasonal. So we need to make sure that our production planning is aligned with that of your team. Sometimes one might think, or easily believe, that a month or two before the product is needed you can simply "pull the trigger," but sometimes it doesn't happen in time. This is purely because some production lines run only once a year, often six months before the product is needed. It's therefore very important for both parties to be aligned on production planning, especially scheduling, because things are not necessarily required within the same quarter as production. So, if we as a customer believe that we have provided enough information in our forecasts or budgets, and it then so happens that there is a scheduling delay, yes, it does impact our perception of reliability. This is particularly important because of the seasonal nature of our products; it's not as if we can simply source the product off the shelf from another supplier. Farmers might have a disease they need to tackle immediately. So yes, production planning can definitely influence our perception of reliability.	Supply Chain Context (1) Production Planning (1) Information & Forecasting (1) (Upstream) Customer relationship impact (2) Dependency (1)	(1) Planning Alignment and Visibility = 4 (2) Perceived Reliability and Relationship Outcomes = 1

2	Well, these delays, you see, if there is a delay on your end, it means there is also a delay on our end, especially for orders that come in very close to the time that the customer wants the product. I would say yes, it is an issue, but from my experience it has not been a very big one. However, we have experienced cases where the delivery or product is not available, or sometimes there is a lapse in communication about how far the process has gone. So yes, the effect on our side is that such delays create pressure with our customers, obviously affecting our relationship with them.	Production Planning (1) Communication (1) (Downstream) Customer relationship impact (2)	(1) Planning Alignment and Visibility = 2 (2) Perceived Reliability and Relationship Outcomes = 1
3	I think I have one major point of feedback here. When supply is delayed, it erodes confidence and creates a negative perception about the supplier's ability to effectively serve us as customers. It begins to raise questions such as, what could be the problem going on there? or what issues might be happening that we do not know about with our supplier? It creates doubt and also a sense of fear, for example, what if we fail to get the products we want on time? What happens if we lose business with our customers? There is also the concern about flexibility, will we receive the same understanding from our supplier if we fail to pay on time, when they did not supply us on time? So overall, this is an issue of confidence and negative perception.	Production Planning (1) (Upstream) Customer relationship impact (2) (Downstream) Customer relationship impact (2)	(1) Planning Alignment and Visibility = 1 (2) Perceived Reliability and Relationship Outcomes = 2
4	It is not a common occurrence, and I do not think it has reached a point where we perceive Company X to be unreliable. I understand the whole process of manufacturing or formulating the various products that we need throughout the season. If, for one reason or another, we or Company X have not forecasted properly, or we have not provided enough information to get the product to us at the right time, then yes, it can result in delays. But generally, these are not long delays, and not long enough for us to complain about.	(Upstream) Customer Customer relationship impact (2) Production Planning (1) Information & Forecasting (1)	(1) Planning Alignment and Visibility = 2 (2) Perceived Reliability and Relationship Outcomes = 1

	We will probably elaborate further on forecasting as the interview continues, but these are small issues, and my perception of Company X has not been tarnished as a result.		
5	Right. I think this question relates closely to the first one about production planning and scheduling delays. This is actually the root cause of the issue. When we do our forecasting, we expect that Company X will align with it. Yes, there might be some changes or adjustments in volumes, and sometimes even cancellations, but having production well planned and well scheduled is what we need. At the end of the day, when we look at Company X in terms of satisfying our requirements, we have the perception that we may not be able to rely 100% on them as a supplier. So we are a bit cautious when committing to our customers, the end users. We cannot go there with full confidence and say the product will definitely be available. Farming requires a high level of certainty, to say, for example, this year we will have access to product X or product Y. You understand how our farmers in Country X, particularly the commercial farmers, operate; they do their budgeting and forecasting well in advance and place their orders early. But when the time comes and the product is needed and we fail to supply, it affects us badly as your customer. Our reputation is at risk because Company X has not supplied the product. I hope that makes sense.	Information & Forecasting (1) Production Planning (1) (Upstream) Customer relationship impact (2) (Downstream) Customer relationship impact (2)	(1) Planning Alignment and Visibility = 2 (2) Perceived Reliability and Relationship Outcomes = 2
6	In terms of reliability, I do not think we question it because of any delays. We understand that Company X has systems and procedures in place to ensure top-quality products. We see Company X as a reliable supplier. However, there are occasions where communication does not come through as promptly as it should. I	Production Planning (1) (Upstream) Customer relationship impact (2) Quality assurance (2)	(1) Planning Alignment and Visibility = 3 (2) Perceived Reliability and Relationship Outcomes = 2

	think some people working in the supply chain do their jobs but may not fully realise the urgency of our requirements as a customer. Sometimes, it comes down to individuals not being as focused on customer requirements as they should be. A bit more engagement and a personal touch would be appreciated. I know we are one of more than a hundred customers, but it would be nice if someone really took ownership of our account. There are often small ways to speed things up if pressure is applied in the right areas, for example, if we are waiting for labels or bottles, pressure could be placed on that supplier to deliver faster. Some people's attitude seems to be, "I have placed the order with the bottle supplier, so we will just wait," instead of pushing for urgency.	Communication (1) Supply Chain Context (1)	
7	These delays obviously have a negative effect, but in general, we are very happy with what we have experienced so far. We have not had any major issues yet with Company X.	Production Planning (1) (Upstream) Customer relationship impact (2)	(1) Planning Alignment and Visibility = 1 (2) Perceived Reliability and Relationship Outcomes = 1
8	I think the experience I have had has been positive. Company X understands its production limitations and prepares us, as the customer, for those constraints. The supplier has been very good at pre-empting our peak demand periods and reminding us early to place orders so that they can process them internally. This has been communicated to us very well, within the necessary time windows. For us, this has been a positive experience, and our perception of reliability is definitely a plus one.	(Upstream) Customer relationship impact (2) Production Planning (1) Communication (1)	(1) Planning Alignment and Visibility = 2 (2) Perceived Reliability and Relationship Outcomes = 1

Theme	Occurrence
(1) Planning Alignment and Visibility	17
(2) Perceived Reliability and Relationship Outcomes	17

ANNEXURE D2 – Question 3

What supply chain obstacles have you encountered that lead to customer dissatisfaction?

Participant	Transcript (Answer)	Categories	Themes
1	I think, purely from an operational environment where decisions must be made with limited access to information, the flow of information is extremely important. You can manage bad news, but it's very difficult to manage no news, as that prevents us from setting realistic expectations with our customers. When I think of a typical obstacle, communication within the customer–supplier relationship comes to mind. We've addressed this quite well over the past few years, but issues still arise across the entire supply chain value chain. For example, if a product is wrongly invoiced or incorrectly priced, it may not seem like a major issue at first. However, when the product arrives in Malawi and we contact Company X to report errors on the documentation or discrepancies in the agreed price, it triggers a chain of complications. While it might appear simple to issue a credit note or correct the invoice, the reality is that duties, permits, bank fees, and inspection costs are all based on the declared value on those documents, which have already been stamped on entry. Even if the pricing is corrected on the system, our landed cost increases, since all additional charges are tied to the document value. Someone must then go back to the border with the new paperwork to get approvals and stamps, because customs payments are made only on presentation of stamped import permits. That's an obstacle we have encountered in the supply chain. I don't think Company X always realises the extent of the impact, as issuing	Information (1) Communication (1) (Downstream) Customer relationship impact (1) (Upstream) Customer relationship impact (1) Documentation and discrepancies (1) Import implications (2)	(1) Information and Documentation Integrity = 5 (2) Capacity, Timing and Cross-border Constraints = 1

	a credit note seems like a simple fix from their side, but it has a far greater downstream effect on our end. It doesn't happen often, but when I think of recent supply chain obstacles, this one stands out.		
2	Yes, I think it still comes back to lead times. As we've already discussed, there are occasions when things don't happen within the stipulated timeframe, and this directly contributes to customer dissatisfaction. There may be one or two things we are doing to improve, but overall, lead time remains a major issue. Transportation delays also occur from time to time, for example, when a product has left but doesn't arrive on schedule, causing delays on our end as well.	Lead Times (2) (Upstream) Customer relationship impact (2) Transportation (2) (Downstream) Customer relationship impact (2)	(2) Capacity, Timing and Cross-border Constraints = 2
3	I would say delayed shipments caused by inaccurate forecasting are a recurring obstacle. In some cases, we fail to provide Company X with an accurate forecast, and then approach you at the last minute for a product, meaning you have to repack or relabel on short notice. Because we didn't forecast properly, this becomes an obstacle on our side and extends the lead times, as products are not picked up from your depot on time. For example, we are still waiting for some products that were not collected when they should have been. Additionally, border-post bureaucracies and changing government regulations, such as new appendices or documentation requirements, have caused further delays in the supply process. Overall, these challenges lead to customer dissatisfaction on our side.	Transportation (2) Forecasting (2) Production Planning (2) Import implications (2) Lead Times (2) Documentation and discrepancies (1)	(1) Information and Documentation Integrity = 2 (2) Capacity, Timing and Cross-border Constraints = 5

		(Upstream) Customer relationship impact (1)	
4	Once again, it comes back to stock availability. We experienced a minor issue with Product W when we transitioned from a larger pack size to a smaller one, which we had both agreed would better suit our market. It took some time to complete the change, but it was part of the natural evolution process to reach that point. I'm not entirely sure whether it led to customer dissatisfaction or simply to our own frustration, since we still had similar products to offer our customers. This meant the pressure wasn't too great on our side. If Product W had been the only available product, it might have led to greater dissatisfaction. However, we understood that it was a necessary process, so there's not much more to add on that.	Production Planning (2) (Upstream) Customer relationship impact (2) (Downstream) Customer relationship impact (2)	(2) Capacity, Timing and Cross-border Constraints = 3
5	There are several issues, but one of the main obstacles has been the suspension of our account, which we understand was due to external Forex constraints. Even though this was beyond anyone's direct control, it created a significant obstacle for us because, ultimately, we couldn't achieve our anticipated sales. This is a supply chain issue, though not one I would place entirely on Company X. The reason I raise it is that, given our long-term relationship and the fact that our organisation has never defaulted on payment, we expected Company X to approach the situation differently, perhaps with understanding of the country's broader economic context, rather than suspending our account outright. We had hoped Company X would acknowledge that the problem lay with the national Forex situation in Country C, not with our organisation's reliability.	Account suspension (2) Import implications (2) Sales (2) (Upstream) Customer relationship impact (2) Production Planning (2) Information (1) Communication (1)	(1) Information and Documentation Integrity = 3 (2) Capacity, Timing and Cross-border Constraints = 5

	That would have been a more collaborative approach instead of simply stopping supply on the grounds that we could not make payment. This has been one major obstacle. There are also minor challenges, such as pack-size issues, for example, with Product G, which we had discussed before. These are broader industry-related challenges. However, another gap is information sharing between Company X and us as their customer. When supply chain adjustments occur, we need to receive that information so we can communicate it effectively to our downstream customers. We have also been requesting smaller pack sizes, as small as 55 mL or 6 g, but this seems to be a capability limitation on Company X's side. While we understand the constraint, it remains a supply chain gap that prevents us from meeting downstream demand effectively.	(Downstream) Customer relationship impact (1)	
6	You're referring to the leaking bottles, right? Yes, any quality issues are a major concern for us. It's not a product we can simply return to the supplier since it's already across the border. In the past, we experienced leaking bottles and containers being damaged during transport, but I haven't seen that recently. Overall, the product quality has generally been good. However, we recently received a batch of Product A that had been manufactured two years earlier. This appears to have been linked to the switch from Product X to Product A, and it seems that older stock was released from storage. Although we received an extension on the product shelf life, it's not ideal, we would prefer to receive freshly produced stock, since it sometimes takes us a while to sell through older product.	Quality issues (1) Import implications (2) Transportation (2) Production Planning (2) Sales (2)	(1) Information and Documentation Integrity = 1 (2) Capacity, Timing and Cross-border Constraints = 4
7	Our main challenge, naturally, is that we import from South Africa across the border. This means our products are not sourced or distributed locally, which adds complexity to the process.	Import implications (2)	(1) Information and Documentation Integrity = 1

	The biggest issues we experience are border delays, usually caused by documentation problems or other administrative paperwork requirements.	Documentation and discrepancies (1)	(2) Capacity, Timing and Cross-border Constraints = 1
8	I think that links back to Question 1, regarding the ability to provide credible and independent quality-control (QC) options, offering assurance and confidence in product quality	Quality issues (1)	(1) Information and Documentation Integrity = 1

Theme	**Occurrence**
(1) Information and Documentation Integrity	13
(2) Capacity, Timing and Cross-border Constraints	21

ANNEXURE D3 – Question 4

How do delivery delays or product unavailability typically affect customers' trust in the company?

Participant	Transcript (Answer)	Categories	Themes
1	It typically affects customer trust very negatively. As I mentioned, we operate in a highly seasonal business. If an opportunity is missed, it is not like producing supply where operations can simply continue at reduced capacity for another week until supply arrives. In agriculture, even a one-week delay can result in lost crops or severely reduced yields. When that happens, customers often have to make alternative plans, sometimes even sourcing products from neighbouring countries because they cannot afford to wait. Delivery delays therefore have a serious impact on customer trust. It also affects our relationships with third parties. If they lose confidence in our reliability, they start looking for alternatives before consulting us and keep those options as a backup plan. While we understand that broader factors play a role and that we also need to provide early forecasts, even in an ideal scenario where forecasting is accurate, delivery delays or product unavailability still have a major impact on trust in the company.	(Upstream) Customer relationship impact (1) Supply Chain Context (1) Missed Opportunity (1) Lost Crops & Reduced Yields (1) Source products elsewhere (1) (Downstream) Customer relationship impact (1) Forecast & Planning (1) Delays (1) Product & Stock availability (1)	(1) Supply readiness and timing = 9

2	It is definitely not a trust issue, and I'm being very honest about that. For me, these are simply normal business-related unforeseen circumstances, and that's how I would categorise them. They do not affect our trust. I must also say that, compared to some of our other suppliers, Company X is one we can rely on. If we have a last-minute order, we can contact your team and usually find a workable solution. So, overall, our trust in the organisation remains unaffected.	(Upstream) Customer relationship impact (2) Last minute orders (2)	(2) Customer communication quality = 2
3	Look, we've worked with Company X for a very long time, and I must say that whenever there have been delays, there has usually been a valid reason. However, at the end of the day, it comes down to confidence in the relationship, whether you view us as a business you want to continue growing with. At times, it can feel a bit uncertain. We wonder whether delays occur because of genuine logistical issues, or because there might be doubt about our reliability or payment timelines. So, while we understand that delays happen, they can sometimes create a sense of discomfort.	Delays (1) (Downstream) Customer relationship impact (1) (Upstream) Customer relationship impact (1) Customer Payment reliability (1)	(1) Supply readiness and timing = 4
4	I don't think trust has ever been an issue between our two companies, and product availability has generally been good. It has never reached a point where I felt frustrated enough to consider moving to another supplier or replacing the products. Our communication levels are strong enough that we can work through any potential delays and discuss them openly when they arise. As far as Company X and our business relationship are concerned, it has never reached a point where I felt the company	(Upstream) Customer relationship impact (1) Product & Stock availability (1) Source products elsewhere (1)	(1) Supply readiness and timing = 4 (2) Customer communication quality = 1

	was untrustworthy or that we should rather do business with someone else.	Delays (1) Communication (2)	
5	Specifically referring to delivery delays and product availability, I believe trust is built over time by consistently meeting customer requirements. When those expectations are not met, uncertainty develops, and that's why we sometimes have to ask ourselves, who else can supply this product? or where else can we source it? We try to keep a basket of suppliers to protect ourselves from such uncertainty. There have been occasional delivery delays, but the key issue is often communication. In most cases, it's us asking for updates, such as "What is the status of this order?" instead of receiving timely information from Company X. For example, there was a time when we placed an order and our customer kept following up, asking, "Where is the product?" When we approached Company X, we were only then informed that the manufacturing unit was not operational, which caused additional delays. It's not just the delay that creates frustration, it's the lack of proactive communication that aggravates the situation. There will always be challenges with delivery or product availability, but timely communication keeps everyone aligned and builds trust. As I've said, no company in the world will always deliver on time or have product available all the time. The important question is, are we communicating with the customer? The communication between Company X and us needs improvement so that we can keep our customers informed. That	Delays (1) Product & Stock availability (1) (Upstream) Customer relationship impact (1) Source products elsewhere (1) Communication (2) (Downstream) Customer relationship impact (2)	(1) Supply readiness and timing = 4 (2) Customer communication quality = 2

	information is crucial not only for us but also for our downstream clients. As Anonymous always says, "When there is no communication, nobody can plan." We cannot plan around silence. Even negative communication is better than none, because at least we can make informed decisions and manage expectations.		
6	It's more about the fact that, while we do as much planning and forecasting as we can and try to order early, there are still times when product unavailability affects us. In those cases, trust can be affected slightly negatively. We understand these challenges are difficult to manage, though. It also depends on the shelf life of the product. In the bioculture sector, we all prefer to receive freshly produced products. However, if it's a product with a three-year shelf life, we would expect that there should be some buffer stock available. Given that Company X has access to historical data on product movements and sales trends, we would assume there's a clear idea of what needs to be produced and kept in stock to meet expected demand. So, if a product with a longer shelf life is unavailable, it does have a negative effect on trust.	Product & Stock availability (1) Forecast & Planning (1) (Upstream) Customer relationship impact (1) Production planning (1)	(1) Supply readiness and timing = 4
7	We definitely trust Company X. They have been a very good and reliable supplier, and they have given us valuable opportunities. Overall, our experience has been very positive.	(Upstream) Customer relationship impact (1)	(1) Supply readiness and timing = 1

8	From my experience, internal inefficiencies or incompetencies that cause unnecessary delays definitely diminish the trust we have in our supplier. We can do all the planning and preparation together, yet small internal errors or mismanagement within the supplier's organisation still occur. We believe these issues often stem from human error or a lack of accountability within the supply chain. Ultimately, such internal problems reduce trust.	Internal inefficiencies and incompetencies (1) Delays (1)	(1) Supply readiness and timing = 2

Theme	Occurrence
(1) Supply readiness and timing	28
(2) Customer communication quality	5

ANNEXURE D4 – Question 5

How would you assess the company's effectiveness in communicating product updates or service changes to customers?

Participant	Transcript (Answer)	Categories	Categories
1	I think there is still some room for improvement, although I say that tongue in cheek because when I look at how my relationship with the company has evolved over the past nine years, the communication between us as supplier and customer has improved tremendously. It is probably a hundred times better than it used to be. As I said, I'm really nitpicking, since there will always be some room for improvement. Occasionally, one still needs to ask and follow up, but overall, communication has become much more consistent. For instance, today we had an issue, not directly with Plant Health, but with another group company, where poor communication led to excessive delays, and a product got stuck in Country Y, causing a lost sale. Even so, in my view, considering that about 95% of our business is with Product A and Company X as a group partner supplier, I honestly believe that communication regarding product updates, availability, and bans has come a very long way. Overall, we are in a strong position and the relationship is on a good footing.	Improvement Opportunity (N) (1) Improved communication (+) (1) Follow-up required (-) (1) Consistent communication and updates (+) (1) (Upstream) Customer relationship impact (2)	(1) Operational communication quality and consistency = 4 (2) Proactive change communication and strategic engagement = 1
2	I don't think so, I believe you have been effective in your communication.	Effective communication (+) (1) Improvement Opportunity (N) (1)	(1) Operational communication quality and consistency = 3

	Of course, there is always room for improvement, since nothing can ever be completely foolproof. If I were to rate you out of 10, I would give you between 8.5 and 9, which I consider a very high rating. Overall, I can confidently say that you have been effective in communicating.	8.75/10 - Effective communication (+) (1)	
3	We have new products in development and a pipeline of upcoming offerings that we would like to introduce to you. We would appreciate if Company X could review our new product line and how we are positioning these products. We believe they could perform well in emerging markets, such as South Africa and other regions where Company X operates. However, this engagement has not materialised recently, particularly during the last financial year, where there has been a bit of a slowdown in collaboration and product updates.	Lack of engagement (-) (2) Lack of collaboration (-) (2) Lack of product updates (-) (2)	(2) Proactive change communication and strategic engagement = 3
4	This is a good one. I had a chat with a colleague and asked what the communication is like between your logistics team and ours. The response was that communication is excellent between our two companies. Your team is often in contact with us regarding product availability and collection readiness, and whenever there are any holdups, we are informed immediately. Communication is frequent, open, and effective. We are very satisfied with the communication levels between the two companies.	Effective communication (+) (1) Consistent communication and updates (+) (1) (Upstream) Customer relationship impact (2)	(1) Operational communication quality and consistency = 2 (2) Proactive change communication and strategic engagement = 1

	In fact, compared to several other suppliers we work with, Company X performs better in this regard. Well done on that.		
5	Communication, as I have already mentioned, remains a challenge. We have seen gaps in communication and have tried several platforms, but I believe this is something that must be reinforced within the team. It needs to be a collective approach, because ultimately, we are all serving one customer, the end user. We act as a channel for Company X, so when there is a communication breakdown, it directly affects the end user we are both trying to serve. Team members need to develop the conviction and awareness that communication is critical. If you do not communicate, you put others in a difficult position. All forms of communication are important, emails, WhatsApp messages, and calls, they are all essential for maintaining an effective communication channel. I am not entirely sure how else this communication problem can be resolved, as it arises in many areas, not just with Company X, but also with other suppliers. To be fair, even our own organisation has communication issues. However, this is an area that requires dedicated effort to ensure smooth and timely communication so that we can keep the end user informed. From our side, we would prefer more communication rather than less. Some may feel that too many updates create information overload or clog email inboxes and phones, but consistent communication is essential.	Poor/Lack Communication (-) (2) Lack of collaboration (-) (2) (Downstream) Customer relationship impact (2) Awareness of the communication importance (2) Effective communication (+) (1) Consistent communication and updates (+) (1) Follow-up required (-) (1)	(1) Operational communication quality and consistency = 3 (2) Proactive change communication and strategic engagement = 4

	For example, some shipping lines provide daily updates on the status of each shipment. Whether you view the update today or tomorrow, the information is there, available and transparent. You don't have to send an email, make a call, or follow up, you can simply check the system to see the current and previous day's status. That is the kind of communication effectiveness and visibility we would like to see implemented.		
6	I think communication has been effective overall. Much of the day-to-day coordination is handled by a team member, but I am copied on all correspondence. On a scale of ten, I would probably rate communication around seven out of ten. On the registration and labelling side, the responsible team member has been very efficient, and planning related to loads and inspections is generally well managed. I cannot think of any significant negative issues. Overall, communication and coordination are quite good.	Effective communication (+) (1) Consistent communication and updates (+) (1)	(1) Operational communication quality and consistency = 2
7	I would rate communication around seven to eight out of ten.	7.5/10 - Effective communication (+) (1)	(1) Operational communication quality and consistency = 1
8	To be honest, I would rate communication around five out of ten. You already understand the context, we have our own technical support systems, so it mainly comes down to how effectively product updates and service changes are communicated. There have not been many recent product updates shared with us. The main concern, which I would describe as poor communication, relates to how	5/10 - Poor/Lack Communication (-) (2) Lack of product updates (-) (2) Poor/Lack Communication (-) (2)	(2) Proactive change communication and strategic engagement = 4

	changes in our service relationship have been handled. For instance, we were informed retrospectively about a shift from being the sole distributor in our market to now being one of several distributors. This kind of change should ideally be communicated proactively.	(Upstream) Customer relationship impact (2)	

Theme	Occurrence
(1) Operational communication quality and consistency	15
(2) Proactive change communication and strategic engagement	13

ANNEXURE D5 – Question 6

In what way/s could external communication be improved to enhance customer experience?

Participant	Transcript (Answer)	Categories	Themes
1	I am not entirely sure I can give a straightforward answer to this question. In the early years, whenever we wanted to implement a communication strategy, whether through email, WhatsApp, or other platforms, the first concern I raised with shareholders was, "We assume we have electricity and a stable connection." That is a risky assumption when building communication systems around technology. Fortunately, infrastructure in Country Y has become much more stable in recent years. I am not sure whether we have been as innovative as we could be in using technology for communication, but overall, our communication has been good. Even if it happens through WhatsApp calls or phone calls, it is consistent and effective. ~~I must admit that internal communication on our side can also improve. Sometimes, team members receive information but do not share it, thinking it is irrelevant or unimportant~~. So, this is something we need to strengthen internally as well. I cannot identify any specific weaknesses in external communication that urgently need improvement. One area that could be enhanced is external communication within Country Y to create customer engagement and market visibility. Our suppliers could become more involved in this effort. That said, we have already made significant progress, for example, we hosted successful field days with Company X's partner, where communication with external stakeholders was excellent. I believe we are on the right track.	Infrastructure and Technology (2) Strategy (1) Communication Channels (2) Location (2) Innovation (2) Customer engagement (1) Market Visibility (2) Supplier involvement & collaboration (1) Overlook opportunities (2)	(1) People and Processes = 3 (2) Systems and Channels = 6

	Sometimes, we may simply not know what we are missing. Being located in a remote part of Africa, we might overlook opportunities that others in more connected regions are already exploring. Still, I cannot pinpoint any specific communication gap at this time.		
2	That is a very good question. To ensure effective communication between the two parties, I would suggest holding monthly virtual meetings, no longer than an hour, to catch up on key matters such as stock availability, pricing, and marketing efforts. These sessions could take place at the beginning or end of each month to review any outstanding issues. Often, small matters arise that are easily forgotten, but having routine meetings ensures that all issues, large or small, are addressed and resolved in a structured, ongoing way.	Communication Channels (2) Product Information & Reviews (1) Market Visibility (2) Structured and frequent communication (1)	(1) People and Processes = 2 (2) Systems and Channels = 2
3	I would rate communication five out of ten, and here is why. Currently, communication within our circles mostly happens when there is an order, a payment to be made, or a training session to organise. An effective communication system should be two-way, consistent, and structured. It should include regular evaluations to review performance, such as quarterly or biannual assessments of payments, collaboration, and overall engagement. These sessions should go beyond operational matters to include performance discussions and strategic planning, creating a predictable, structured framework where all parties know when communication and review will take place.	Supplier involvement & collaboration (1) Structured and frequent communication (1) Product Information & Reviews (1) Strategy (1)	(1) People and Processes = 4

4	In the logistics chain, communication between the relevant team members has been very good, and the feedback is positive. The logistics team is satisfied with how the process is running and does not believe there is much that needs improvement at this stage. As for communication between our teams, it has also been strong and effective. The services provided to customers and farmers are quite complex, but in most cases, we manage to deliver what we promise within a reasonable timeframe. If there is any area for improvement, it might be to appoint a dedicated team member responsible for consolidating data, managing figures, and producing reports more quickly while the rest of the team focuses on fieldwork and customer visits. This would help streamline processes and speed up information flow. Overall, communication has been good, and the service offered by Company X is exceptional, far above what other suppliers provide. With greater capacity, this service could be expanded even further. We also recognise the effort and travel involved in delivering such support, and we truly appreciate the work that goes into meeting commitments. What has been promised has been delivered, and that deserves recognition.	Stakeholders (1) Customer engagement (1) Structured and frequent communication (1) Product Information & Reviews (1) Capacity (2) Supplier involvement & collaboration (1)	(1) People and Processes = 5 (2) Systems and Channels = 1
5	To improve external communication and enhance the customer experience, I believe lessons can be learned from shipping lines. They appear to have automated update systems that provide daily notifications on the status of each order. While this should not be the only communication channel, having multiple communication platforms that reach different stakeholders in the value chain would be valuable. Within the company, for instance, some people may simply need to know where a shipment is located, while others may need to know	Innovation (2) Infrastructure and Technology (2) Communication Channels (2) Stakeholders (1)	(1) People and Processes = 3 (2) Systems and Channels = 3

	what specific products are included. Each of these groups can use this information to better serve the end customer. Therefore, expanding and formalising the available communication platforms is essential. For example, although WhatsApp is often viewed as a casual platform, if used correctly, it can play a meaningful role in maintaining communication. Additionally, developing online portals accessible to all relevant stakeholders would make it possible to track progress in real time, for example, being able to see whether an order is in production, in dispatch, or delivered. Such transparent and multi-channel communication systems would greatly improve efficiency and enhance customer satisfaction.	Product Information & Reviews (1) Structured and frequent communication (1)	
6	On the day-to-day operations, communication is very good, particularly regarding logistics and transport coordination. The relevant team members consistently provide timely feedback and support. Overall, there are no negative issues to report in terms of daily communication, it is efficient and effective	Product Information & Reviews (1) Structured and frequent communication (1)	1) People and Processes = 2
7	Currently, weekly order reports are shared, but I would prefer that they be sent consistently every week without interruption. Regular updates are essential to maintain visibility on all outstanding and completed orders. In addition, I would appreciate having a fixed monthly meeting with the assigned account manager to discuss the monthly plan and any current issues. We have attempted to do this in the past, but it has not been fully consistent. Establishing these regular check-ins would help strengthen communication and planning.	Product Information & Reviews (1) Market Visibility (2) Communication Channels (2) Stakeholders (1)	(1) People and Processes = 2 (2) Systems and Channels = 2

8	I think what is needed is more consistent communication to assess and understand each other's expectations and needs. When too much time passes without interaction, as with any relationship, poor communication can cause the parties to drift apart. By maintaining regular, ongoing dialogue, we can remain aligned in our goals and ambitions and address issues promptly as they arise. Consistent engagement helps ensure that both sides stay connected and work toward the same outcomes.	Supplier involvement & collaboration (1) Structured and frequent communication (1) Product Information & Reviews (1) Strategy (1)	1) People and Processes = 4

Theme	**Occurrence**
(1) People and Processes	25
(2) Systems and Channels	14

ANNEXURE D6 – Question 7

How do customers generally respond to the company's handling of complaints/after-sales service?

Participant	Transcript (Answer)	Categories	Themes
1	In response to how we handle after-sales complaints, I believe these are now managed much more effectively and in real time. Updates are processed immediately, for instance, when pricing adjustments or credit notes are required, they are completed promptly. However, these corrections can sometimes have a financial impact on landed costs, especially when pre-quoted prices prevent cost recovery, effectively reducing our gross profit margin. This reinforces our belief that prevention is better than correction. We strive to address potential issues before they develop into formal complaints, and I believe we have been successful in doing so. Instances of missed communication or delayed responses have become far less frequent than in the past. Out of the 13 to 14 multinational suppliers we work with daily, Company X performs exceptionally well. We appreciate the quick, practical responses and immediate corrective actions when issues do arise. Overall, our strategy of proactive management has paid off. Complaints are now rare and efficiently resolved, and our experience with Company X remains overwhelmingly positive	Proactive management and corrective action (1) Quick response time (1) Pricing adjustments and financial implications (2) Communication (1) Strategy Positive (2)	(1) Responsiveness and Issue resolution = 3 (2) Product and Service Quality Assurance = 2
2	The response from Company X has been good, and that may be partly because we have not experienced any major issues. We have had a few complaints, but nothing particularly serious or recurring. There may have been one or two instances where things could have been handled better, but overall the response has been	Positive (2) Improvement opportunity (2)	(1) Responsiveness and Issue resolution =4 (2) Product and Service Quality Assurance = 3

	positive. However, in the event of a serious customer complaint, particularly related to product performance, it would be beneficial if Company X deployed a technical team to visit the site directly. This would allow the team to assess the situation on the ground, engage with affected farmers, and identify the root cause of the issue. While we have not yet encountered a problem that required such intervention, having this option available as part of the response framework would be highly valuable. It would demonstrate a commitment to hands-on technical support and proactive problem solving.	Product quality and performance (2) Technical support, site visits and Root Cause identification (1) Proactive management and corrective action (1) (Downstream) Customer relationship impact (1) (Upstream) Customer relationship impact (1)	
3	I must commend Company X for the way after-sales complaints are handled. Response times are quick, and the team always seeks to gather factual data to validate and understand the issue, which reflects a professional and structured approach. It could not be handled much better in my view. When problems occur, the company responds positively and constructively, which provides confidence in the process. Compared to other suppliers, Company X's after-sales support stands out for its frequent follow-ups and commitment to resolving matters thoroughly. Overall, I am very satisfied with the after-sales service, and I believe it demonstrates a genuine commitment to customer care and continuous improvement.	Positive (2) Quick response time (1) Technical support, site visits and Root Cause identification (1) (Upstream) Customer relationship impact (2) Proactive management and corrective action (1) Communication (1)	(1) Responsiveness and Issue resolution = 4 (2) Product and Service Quality Assurance = 2

4	We have two main areas of interaction with Company X. The first is on the logistics side, which is managed by one of your team members. This includes invoicing, crediting, and related processes. Her view is that your logistics team is always helpful, responsive, and quick to resolve queries or problems, which we really appreciate. The second area relates to technical support. I recall one specific case involving a customer who raised a query. I visited him personally to better understand the concern, and I then passed the details on to your technical representative, who responded promptly and professionally. When an issue is urgent, I sometimes request that the technical team make direct contact with the customer the same day, and they generally do so without delay. The only times we have experienced slower responses were when your team was working in remote areas, where communication can be difficult. In that instance, your representative followed up as soon as possible and later scheduled an on-site meeting, which resolved the matter effectively. The customer has remained loyal and satisfied with the Company X product range, which reflects well on the team's responsiveness. Overall, I would say the service is very good, and delays only occur in cases where connectivity or travel logistics are a challenge.	Supply chain & logistics (2) Pricing adjustments and financial implications (2) Technical support, site visits and Root Cause identification (1) Quick response time (1) Proactive management and corrective action (1) (Upstream) Customer relationship impact (1) Location and Infrastructure (1) Communication (1) Positive (2)	(1) Responsiveness and Issue resolution = 6 (2) Product and Service Quality Assurance = 3
5	We receive good support in terms of complaint handling through Company X's online platform, but one concern is the complexity of the complaint form. The form feels too lengthy and detailed for customers to complete, especially when they are already frustrated. When a customer is dissatisfied, they are unlikely to have the patience or willingness to fill in a four- or five-page document	Positive (2) Complexity of documentation (2) Frustration & Dissatisfaction (2)	(1) Responsiveness and Issue resolution = 3 (2) Product and Service Quality Assurance = 3

	requiring extensive information. While it is understandable that the company needs technical details to properly assess the issue, the current format feels more like an interrogation than a support process. It may be more effective to simplify the form or to collect additional details later through follow-up communication. This would make the process less burdensome and show empathy for the customer's state of mind. In short, the support is good, but the complaint submission process could be streamlined to enhance the overall customer experience.	Technical support, site visits and Root Cause identification (1) Communication (1) (Upstream) Customer relationship impact (1)	
6	Regarding the complaint about the leaking bottles, the issue was handled fairly thoroughly, although we still had to manage quite a lot of the work on our side. In hindsight, it might have been better if a member of Company X's team had travelled to inspect the situation in person, given the seriousness of the problem. While I understand that tests were conducted, the fact that we were still expected to package and send those bottles to customers meant we had to take additional precautions ourselves, such as re-sealing bottles and ensuring no further issues would arise. There was strong follow-up communication regarding the complaint and the search for a new packaging supplier, but addressing the existing defective stock could have been managed more directly. In that respect, we as the customer were left to resolve the issue internally. As for the technical support, I would say we are currently not receiving much backup on the product side, especially in terms of technical advice or product-related follow-ups. With the	Improvement opportunity (2) Technical support, site visits and Root Cause identification (1) Product quality and performance (2) Communication (1) Proactive management and corrective action (1) (Upstream) Customer relationship impact (1)	(1) Responsiveness and Issue resolution = 4 (2) Product and Service Quality Assurance = 2

	expired product issue, I also felt that we never quite reached a clear resolution.		
7	I would say that both areas have been managed very well, and overall the support has been very good. When we previously had a dedicated support contact, it was a bit easier for clients because issues and complaints were handled more quickly. However, the current service remains strong and responsive, and I have no negative feedback to give at this stage.	Positive (2) Technical support, site visits and Root Cause identification (1) (Downstream) Customer relationship impact (1) Quick response time (1)	(1) Responsiveness and Issue resolution = 3 (2) Product and Service Quality Assurance = 1
8	Generally feel that Company X takes quality issues very seriously, which is a very positive reflection on the business. During one specific incident, the Company X team travelled to site, joined us, and took ownership of the issue alongside us and the end user, which left a strong positive impression. We worked collaboratively to find a solution that satisfied all parties, the customer, ourselves, and Company X. In other cases too, the supplier has proactively engaged technical and professional support teams to help resolve challenges, such as involving specialist technical teams when needed. This approach gives us a great deal of confidence. We know that when problems arise, Company X will stand alongside us to resolve them to the customer's satisfaction. It reinforces our sense of trust and partnership in the relationship.	Product quality and performance (2) Positive (2) Technical support, site visits and Root Cause identification (1) Proactive management and corrective action (1) (Upstream) Customer relationship impact (1) Collaboration (1) (Downstream) Customer relationship impact (1)	(1) Responsiveness and Issue resolution = 5 (2) Product and Service Quality Assurance = 2

Theme	Occurrence
(1) Responsiveness and Issue resolution	26
(2) Product and Service Quality Assurance	18

ANNEXURE D7 – Question 8

What elements of service delivery do you believe are most valued by customers?

Participant	Transcript (Answer)	Categories	Themes
1	Communication remains extremely important to us, but it is supported by the fact that we believe in the product and the company. We have confidence in the quality, packaging, presentation, and compliance of the products supplied by Company X. This trust makes managing the product portfolio within Country Y far easier compared to other suppliers. As mentioned before, you can manage bad news, but you cannot manage no news. Fortunately, communication with Company X has been consistent and effective for a number of years now. Each person understands who the correct point of contact is for specific matters, and communication takes place whenever necessary. This clarity and openness in communication, supported by product reliability, has built strong confidence and collaboration between both parties.	Communication (2) Product reliability, quality, compliance and service delivery (1) (Upstream) Customer relationship impact & trust (2)	(1) Product performance and supply reliability = 1 (2) Communication, expertise and commercial support = 2
2	The first key area is product knowledge. Company X has invested considerable effort in ensuring that sales representatives understand the products thoroughly. They have taken time to conduct product training and knowledge sessions, which has strengthened our ability to sell confidently and provide accurate information to customers. Another effective initiative has been the sales incentive programmes. These have been particularly motivating, as targets are linked to tangible rewards, which drives engagement and results. Incentive-based approaches are well-known to improve sales performance, and we have seen this in practice.	Product knowledge & Technical advice (2) (Downstream) Customer relationship impact & trust (2) Sales, incentive & performance (2) (Upstream) Customer relationship impact & trust (2)	(1) Product performance and supply reliability = 1 (2) Communication, expertise and commercial support = 4

	In addition, there has been a noticeable focus on building personal relationships between our teams. Over time, this relationship has grown beyond purely professional interactions, creating a level of trust and collaboration that supports the sales process. Finally, the quality and branding of the products themselves have made a strong impact. Although some of the products are generics, the branding by Company X gives them a distinct identity and higher perceived value in the market. This differentiation strengthens our sales offering and allows us to compete effectively.	Product reliability, quality, compliance and service delivery (1)	
3	One of the most valuable aspects of working with Company X is the quality of technical advice provided. This advice goes beyond basic product knowledge, it reflects a deep understanding of agriculture and how the company's products positively influence the broader value chain. This technical competence adds significant value to our business. Although there are occasional delays, Company X consistently maintains one of the shortest delivery lead times compared to other suppliers, which helps us plan and operate efficiently. Over time, we have also built a strong relationship founded on trust and collaboration, which has led to flexible payment terms being offered. This flexibility demonstrates confidence in our partnership and contributes greatly to sustaining our business operations.	Product knowledge & Technical advice (2) Supply Chain (Context) (1) Delivery lead times (1) (Upstream) Customer relationship impact & trust (2) Payment terms & Credit Facilities (2)	(1) Product performance and supply reliability = 2 (2) Communication, expertise and commercial support = 3
4	We've mentioned before that stock availability is essential. Along with that, maintaining good communication across all parties, as well as effective and quick problem-solving, is crucial to ensuring customer satisfaction. Another important factor is pricing. However, Company X's products are unique, which reduces the typical pricing pressure we see with generic competitors. We have deliberately avoided	Stock availability (1) Communication (2) (Upstream) Customer relationship impact & trust (2)	(1) Product performance and supply reliability = 1 (2) Communication, expertise and commercial support = 4

	direct competition with generic manufacturers, and this strategic positioning has benefited both our company and Company X. Overall, having products consistently available, maintaining clear two-way communication, and addressing challenges efficiently have all contributed to a positive working relationship. We would give a good to very good rating across these areas.	Pricing (2) Strategic Positioning (2)	
5	For us, it comes down to the basics: orders should be supplied in full and on time. If we place an order for 5,000 litres of a product, it must be delivered completely and punctually. The key expectations are timeliness, accuracy, and product quality. Defective products should never be sent, the supplier should identify and address defects before dispatch. We have also experienced challenges where third-party contractors, such as transporters, have contributed to poor service delivery. However, from our perspective, we view Company X as the supplier, regardless of which transporter is used. When deliveries are arranged under CFR (Cost and Freight) terms to Country D, for example, we expect to receive the product at our location without needing to liaise with the transporter directly. Therefore, Company X should ensure that all logistics partners and contractors uphold the same service standards, since their performance reflects on the company. Ultimately, efficient logistics coordination and quality control are essential to maintaining customer satisfaction.	Delivery lead times (1) Product reliability, quality, compliance and service delivery (1) Third parties (1) Delivery lead times (1)	(1) Product performance and supply reliability = 4
6	Product quality is one of the main reasons we continue to work with Company X. There are many suppliers and products in the market, but we prefer to partner with those whose products consistently deliver the expected results. As a company, we pride ourselves on delivering a high level of service, and to maintain that standard, we rely on suppliers who provide reliable, high-quality products. We have confidence in	Product reliability, quality, compliance and service delivery (1) (Downstream) Customer relationship impact & trust (1)	(1) Product performance and supply reliability = 3

	Company X's products because they are backed by extensive research, trials, and a well-managed production and quality control (QC) system. This commitment to quality and consistency builds trust and confidence in the relationship, giving us assurance that the products we distribute will perform effectively and uphold our own company's reputation.	Research & Development (1)	
7	For us, one of the biggest advantages of working with Company X has been their consistent supply of good-quality stock. Having products readily available has made a significant impact on our operations and customer service. Equally important has been the trust extended through credit facilities, which allowed us to maintain stock levels and better serve our customers. This financial flexibility has played a key role in helping our business grow to where it is today. Additionally, the technical support provided, such as participation in farmers' days and on-the-ground engagement with customers, has added great value to our relationships with farmers and strengthened customer confidence in the products.	Product reliability, quality, compliance and service delivery (1) Delivery lead times (1) (Upstream) Customer relationship impact & trust (1) Payment terms & Credit Facilities (2) (Downstream) Customer relationship impact & trust (2) Product knowledge & Technical advice (2)	(1) Product performance and supply reliability = 3 (2) Communication, expertise and commercial support = 3
8	When considering elements of service, one of the most significant aspects has been credit terms. Operating in a market that has often been economically unstable, we have found Company X to be both supportive and flexible in this area. The company has demonstrated a willingness to adjust payment terms when necessary, showing understanding of market realities and customer circumstances. At the same time, Company X	Payment terms & Credit Facilities (2) Supply Chain (Context) (1)	(1) Product performance and supply reliability = 1 (2) Communication, expertise and commercial support = 3

	maintains a level of payment discipline, which we view positively because it encourages responsible business practices and financial stability on both sides. This balance between flexibility and discipline has created a mutually respectful partnership and strengthened our long-term working relationship. We do know that we can communicate with each other and yeah, get some leeway based our our communication between each other. So that to me has been an element of service that has been. Very valuable to us over the years, you know.	(Upstream) Customer relationship impact & trust (2) Communication (2)	

Theme	Occurrence
(1) Product performance and supply reliability	16
(2) Communication, expertise and commercial support	19

ANNEXURE D8 – Question 9

Can you share an example where service-related improvements were made in response to customer feedback?

Participant	Transcript (Answer)	Categories	Themes
1	There are probably many more aspects that could be mentioned, because the representative from Company X, who acts as our key account manager, is not only involved in the supply and logistics of products but also plays a role in strategic planning at farmer level. This means that communication and information sharing between us is direct and timely, which enables us to address issues quickly and effectively. In particular, there has been noticeable improvement in areas such as product supply coordination, compliance with local regulations, and updates on packaging, labelling, and marketing materials. These changes have been well-handled and have made a positive difference in the business relationship. Reflecting on recent experiences, I can confidently say that feedback we provided as a customer has been acted upon promptly and effectively. The responsiveness and willingness to adapt shown by Company X have significantly improved both product delivery and presentation quality.	Supply chain and logistics (1) Strategic Planning & Growth (2) Effective Communication & Information sharing (2) Product reliability, quality, compliance (1) (Upstream) Customer relationship impact (1) Adaptability, flexibility and responsiveness (1)	(1) Operational reliability and enablement = 4 (2) Strategic collaboration and communication for growth = 2
2	Price is certainly a key factor. Earlier in the season, we raised concerns with Company X that some products were not competitively priced, and we appreciated the prompt response. Prices were adjusted, and in some cases, we were even able to secure products through tenders, which improved our competitiveness in the market. Overall, current pricing structures are much better compared to where we were earlier in the season.	Price (1) Effective Communication & Information sharing (2) Competitiveness (2)	(1) Operational reliability and enablement = 4 (2) Strategic collaboration and communication for growth = 2

	Beyond pricing, we have also requested operational support in areas that may seem small but have a significant impact, for example, supplying measuring jugs, facilitating training sessions, and providing other field support tools. Each time we have raised such needs, Company X has responded positively and efficiently, which has made a real difference in enabling us to serve our customers more effectively.	Operational support (1) (Downstream) Customer relationship impact & trust (1) Adaptability, flexibility and responsiveness (1)	
3	This was quite a tricky question to interpret at first, but thinking about it now, I can see that Company X has demonstrated flexibility and responsiveness in supporting our product needs. For example, with one of the products, rather than imposing it on us, Company X allowed us to take the initiative. We identified the product in the company's catalogue, recognised its potential value within our portfolio, and requested registration. That decision has paid off well, as the product has since become one of our fastest-growing items, and we plan to expand its footprint further. Another good example is with a different product line, where we collaboratively decided to introduce larger packaging sizes to improve competitiveness and pricing efficiency in the market. This flexible approach has since shaped our broader product growth strategy, which we now also apply to other offerings. Overall, these examples show that Company X is adaptable and responsive, making changes that allow us to better serve our customers and grow the business together.	Operational support (1) Collaboration (2) Competitiveness (2) Price (1) Strategic Planning & Growth (2) Adaptability, flexibility and responsiveness (1) (Downstream) Customer relationship impact & trust (1) Strategic Planning & Growth (2)	(1) Operational reliability and enablement = 4 (2) Strategic collaboration and communication for growth = 4

4	Overall, I believe we are working together quite effectively and maintaining a close working relationship. There is always room to strengthen collaboration further, as the type of work we do benefits greatly from continued engagement. At present, I probably see a Company X technical representative four or five times a year, but it could be beneficial to increase that frequency to around eight visits annually. Additional visits would create opportunities to develop other areas of the business beyond our current focus. Most of our attention has been on Product M, which naturally takes time and travel across the country. However, there is potential to expand into other segments such as vegetables, citrus, and avocados. With more regular interaction and shared planning, these areas could grow meaningfully. That said, I recognise the effort and commitment already being shown, the support we receive goes above and beyond what many others provide. My suggestions come from a place of wanting to build on that strong foundation, not from dissatisfaction.	(Upstream) Customer relationship impact (2) Collaboration (2) Frequency of visits (2) Strategic Planning & Growth (2)	(2) Strategic collaboration and communication for growth = 4
5	Yes, packaging has been an area where we've seen both challenges and excellent support from Company X. In the past, we experienced several packaging-related issues, including concerns about the size and material quality. After raising these concerns, Company X responded promptly and made the necessary adjustments, which we greatly appreciated. There was also a time when we faced supply difficulties sourcing a specific product, and Company X stepped in to assist, helping us access stock from a neighbouring region. That level of responsiveness and hands-on support made a significant difference in resolving our issue quickly. For us, this is exactly the kind of partnership and service approach we value, when problems arise, Company X is proactive and dependable in providing assistance.	Product reliability, quality, compliance (1) Operational support (1) Adaptability, flexibility and responsiveness (1) Supply chain and logistics (1) (Upstream) Customer relationship impact (1)	(1) Operational reliability and enablement = 5

6	One area where we received great support from Company X was on the credit side. With the growth in our business, we requested an increase in our credit limit, and the company responded positively. Instead of relying solely on external credit-check processes, Company X placed trust in our long-standing relationship, which we greatly appreciated. That decision showed confidence in our partnership, and we were pleased to deliver on our commitments in return. Regarding the packaging and product quality issue, specifically with the bottles, I believe many companies might have simply dismissed the concern since the bottles were technically functional. However, Company X took the complaint seriously, worked with production and quality control teams, and found an alternative supplier to resolve the issue. This demonstrated flexibility, responsiveness, and customer-focused problem-solving, which strengthened our confidence in the company.	Operational support (1) Credit Limit (1) Adaptability, flexibility and responsiveness (1) (Upstream) Customer relationship impact (1) Product reliability, quality, compliance (1)	(1) Operational reliability and enablement = 5
7	One key example relates to the import process. Since I have prior experience handling imports in County Z, I was able to provide suggestions to improve the efficiency and timeliness of product importation. Company X was receptive to these recommendations, and the resulting adjustments have made the process smoother and more reliable. Another significant improvement also concerned imports, specifically products manufactured within South Africa that qualify for SADC certification. I suggested that the company assist us in obtaining these certificates, which they did. This change reduced our importation costs, and as a result, lowered costs for farmers, which has a meaningful impact in the market.	Import process (1) Supply chain and logistics (1) Adaptability, flexibility and responsiveness (1) SADC Certification (1) Operational support (1) Price (1)	(1) Operational reliability and enablement = 6 (2) Strategic collaboration and communication for growth = 1

	Overall, these actions demonstrated that Company X listens to feedback and implements practical solutions, which has strengthened our operational efficiency and customer satisfaction.	Strategic Planning & Growth (2)	
8	In terms of customer feedback, we have maintained open communication with Company X regarding our sales strategies and potential large orders linked to upcoming tenders and business opportunities. This proactive sharing of information has led to positive operational adjustments on the company's side. For example, based on our communication about anticipated demand, Company X preemptively placed internal stock orders for certain key products such as Product A, even before receiving formal purchase orders from us. This proactive approach ensured product availability and helped us meet market demand on time. Additionally, after sharing our sales strategy and financial projections, Company X reviewed and increased our credit limit, which supported our ability to pursue new business opportunities. This decision reflected trust, collaboration, and responsiveness to customer needs.	Effective Communication & Information sharing (2) Strategic Planning & Growth (2) Adaptability, flexibility and responsiveness (1) Supply chain and logistics (1) Credit Limit (1) Operational support (1) Collaboration (2)	(1) Operational reliability and enablement = 4 (2) Strategic collaboration and communication for growth = 3

Theme	Occurrence
(1) Operational reliability and enablement	32
(2) Strategic collaboration and communication for growth	16

ANNEXURE D9 – Question 10

What changes would you recommend to improve customer satisfaction across the company?

Participant	Transcript (Answer)	Categories	Themes
1	It all ultimately comes down to communication. If I could make a wish list, I would start with a broader issue, not specific to division X, but rather a group-level concern. Having a dedicated key account manager who can represent our requirements at group level, and not only within Division X, would make a significant difference. We operate in a relationship-driven agricultural market, which differs from the group's more industrial-focused divisions. In those areas, engagement is mainly with procurement staff or managing directors, where a personal touch is not as necessary. In our market, however, attention to detail and personal relationships are critical, and we can feel a communication gap within the group. For example, in Country Y we currently represent three group companies, each with its own key account manager. Two of them have limited understanding of the operations, while one is somewhat overqualified for the position. If these roles could be centralised or better coordinated, communication and alignment would improve considerably. While communication across the group can still be challenging, I must acknowledge that if I had been asked this question four or five years ago, I could have identified several major issues. However, most of those challenges have since been addressed	Communication & Alignment (1) Dedicated key account manager (1) Supply Chain (Context) (2) Personal Touch (1) Attention to detail (1)	(1) People and partnership = 4 (2) Product, price and supply = 1

	satisfactorily, based on the progress noted in meeting minutes and board discussions.		
2	It's a tough one because most of the issues we've discussed in the past have already been implemented. From my perspective, one area that could still improve is on-the-ground support. In the past, your team regularly visited customers and provided direct technical and relationship support, but this has reduced somewhat over the past year. Our competitors have increased their presence, bringing in experts to speak about new products and technologies. In contrast, Company X has not done much of that recently, especially over the last six to twelve months. I think it would be valuable to once again have experts visiting customers or hosting focused sessions on specific crops or products, as was done before. Another improvement area is knowledge sharing. If there are opportunities to attend symposiums, training sessions, or innovation events, it would be helpful for our sales team to participate, whether virtually or in person, so that they can stay up to date with new developments relevant to your products. Beyond these two areas, I can't identify major concerns. As mentioned, most of the previous challenges have already been addressed successfully.	Technical & relationship Support (1) Regular Visits (1) Competitiveness (2) Information & Knowledge Sharing (1)	(1) People and partnership = 3 (2) Product, price and supply = 1
3	For me, the most important improvement area would be the development of a strategic product pipeline. We should be planning at least five years ahead, identifying which new products will be introduced each year and which ones have the potential to become high-impact or flagship products. At present, much of the focus is on growing existing products, but a stronger emphasis on innovation and long-term portfolio planning would ensure sustained	Strategic Planning & Innovation (2) Information & Knowledge Sharing (1) Sales and Profit (2) Pricing & Pricing Strategies (2)	(1) People and partnership = 1 (2) Product, price and supply = 5

	growth. This would help us track progress not only in terms of the product range, but also in terms of profitability and gross profit contribution from the products supplied. Pricing is another critical factor that influences satisfaction and competitiveness, particularly for mature products that have been on the market for several years and now face increased competition. To your credit, the company has been very responsive in recent pricing adjustments, and that is appreciated. However, for some products, such as X, more competitive pricing strategies would be essential to ensure that we can continue to grow and maintain our market share. In summary, a clear long-term product development plan combined with competitive pricing would greatly enhance customer satisfaction and business growth.	(Upstream) Customer relationship impact (2) Competitiveness (2)	
4	Overall, the way we conduct business together is very positive, and we've developed a strong, cooperative relationship. I genuinely appreciate the level of effort and support already provided, especially given the relative size of our business compared to yours. That said, I think there is potential to do more, particularly through digital engagement and awareness platforms. While traditional field visits remain important, a user-friendly digital platform could help reach a wider audience of farmers, allowing them to access product information by crop type, view content, and learn about available solutions. Although digital tools may not always fully reach the farming community, especially those less active online, they could still serve as valuable communication and education tools. Another key area for improvement relates to language localisation. Ensuring that marketing materials and	(Upstream) Customer relationship impact (1) Technical & relationship Support (1) Digital Engagement and awareness platforms (1) Language localisation (1) (Downstream) Customer relationship impact (1) Personal Touch (1) Accessibility & Engagement (1)	(1) People and partnership = 7 (2) Product, price and supply = 3

	technical information are available in languages familiar to the farmers, whether Afrikaans, English, or isiZulu, creates better connection and trust. This personalisation through language enhances accessibility and engagement. In addition, product packaging and sizing should be aligned with the specific needs of local markets. Offering appropriate pack sizes that match the purchasing power and operational scale of different customer segments would help reach a broader base and prevent products from being perceived as too costly or impractical. In short, while the partnership is already strong, increased digital presence, localised communication, and market-aligned packaging could significantly enhance customer reach and satisfaction.	Production Planning (2) Market Needs (2) Pricing & Pricing Strategies (2)	
5	From my perspective, two key areas need improvement. First, communication must be strengthened to ensure that all stakeholders are aligned and informed throughout the process. Second, there needs to be better alignment between forecasting and production, to ensure that products are delivered on time and customer needs are met without unnecessary delays.	Communication & Alignment (1) Information & Knowledge Sharing (1) Production Planning (2)	(1) People and partnership = 2 (2) Product, price and supply = 1
6	One of the main challenges we face is pricing. We feel that the products are relatively expensive, particularly when compared to similar products offered by competitors. This has become a major concern, especially where competing products enter the market under slightly altered names, yet are essentially identical. This situation has created price wars in the market and has effectively commoditised products that should retain a higher value. It becomes difficult to justify	Pricing & Pricing Strategies (2) Competitiveness (2) Sales and Profit (2) Production Planning (2)	(2) Product, price and supply = 5

	promoting these products when customers are offered what appears to be the same item at a lower price. This has negatively affected sales volumes and gross profit margins, making it less worthwhile to continue offering certain lines. Another challenge relates to shelf life extensions, which sometimes take a long time to finalise due to laboratory testing requirements. While this is understandable, it can delay sales and reduce flexibility in managing stock. Lastly, transport and logistics remain areas where improvement is possible. We often spend significant time sourcing affordable transport options, and perhaps a company of Company X's scale could leverage contracted transport providers to negotiate better rates and efficiency, thereby improving overall competitiveness.	Transport and Logistics (2)	
7	From our perspective, price remains a major factor in the market. Continued support from Company X in achieving the most competitive pricing would make a significant impact, particularly given the recent price pressures experienced over the past few months. In addition, the absence of technical support since the departure of our previous account manager has highlighted the importance of having a dedicated technical representative. Having someone on the ground who can visit clients, provide product guidance, and maintain visibility with farmers would help sustain customer confidence and strengthen Company X's presence in the market. Lastly, consistent stock availability and logistical support are essential, especially when responding to unforeseen spikes in demand or urgent orders. Maintaining reliability in product supply under such circumstances would further enhance overall customer satisfaction and operational effectiveness.	Pricing & Pricing Strategies (2) Technical & relationship Support (1) Competitiveness (2) Information & Knowledge Sharing (1) (Upstream) Customer relationship impact (1) (Downstream) Customer relationship impact Production Planning (2)	(1) People and partnership = 3 (2) Product, price and supply = 5

		Transport and Logistics (2) (Upstream) Customer relationship impact (2)	
8	I believe the key is to maintain openness and honesty regarding Company X's ambitions in the markets where we operate. For instance, when the second distributor was introduced, there was transparency, and both parties agreed that it could work. However, the later introduction of another distributor was handled without prior consultation, despite there being a verbal understanding of exclusivity. This created frustration and negatively affected the trust and relationship between the two parties. On the supply chain side, one challenge relates to short shelf-life products and tender volumes. Often, we face returns that cannot be resold outside of tender contracts and lose viability before the next season. It would be beneficial if there were mechanisms such as rebates, repacking options, or shared responsibility for unsold tender stock. For example, if returned products could be repacked into smaller formats for resale, it could reduce waste and improve sustainability. Additionally, there is a need for greater sharing of trial data and product performance insights. Providing relevant, current data would strengthen our marketing and technical credibility, helping us to better communicate the value proposition of Company X's products to customers and support continued satisfaction.	Supply Chain (Context) (2) (Upstream) Customer relationship impact (2) Production Planning (2) Information & Knowledge Sharing (1) Communication & Alignment (1) Technical & relationship Support (1) (Downstream) Customer relationship impact (1)	(1) People and partnership = 4 (2) Product, price and supply = 3

Theme	Occurrence
(1) People and partnership	24
(2) Product, price and supply	24

ANNEXURE E: TURNITIN REPORT

J Du Plessis

DISSERTATION 27 NOVEMBER 2025

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