

INTAS Project: Supporting the International Development of the CIS Agricultural
Sector

An Overview of Findings from the Ukrainian Case Studies

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Alexander Skripnik, Svetlana Chernyshova and Tatyana Vinichenko

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1. Introduction¹

This report outlines the results of the survey undertaken at the third phase of the INTAS Project 04-79-6928 in Ukraine. The project goal at this stage was to conduct case studies of export led growth thereby enabling potential identification of best practice in international marketing strategy.

The first part of the research was to compare four exporting dairies versus four non-exporting dairies in Ukraine to identify differences in supply chain relationships with farmers. The study was comprised of interviews with exporting and non-exporting dairies.

The second part of the research was to focus on four dairies to understand the main trade problems they encountered and how they had sought to address them. It was anticipated that the four dairies would be a mixture of successful exporters and those who had registered disappointing export performance, so that possible differences between the two groups could be identified.

Due to the ban introduced by Russia, the main export market for the Ukrainian dairies, in the beginning of 2006 most dairies were could not export to the Russia Federation. Knowing that 6 companies managed to get permission to resume the export to Russia in spring 2006, the decision was made to apply for those companies as examples of successful exporters.

The interviews reported were conducted in between September and November 2006.

¹ Acknowledgements

We would like to sincerely thank all the managers who devoted time to participation in the project. We would also like to express our gratitude to Natalia Ignatova, a manager of Atarta-Tanit company, for informational support of the project and sharing her thoughts with regards to the sector.

2. Methodology

Structured interviews were used to examine supply chain relationships with farmers (representatives of eight companies interviewed) and subsequently examine trade / export challenges (representatives of four companies interviewed). The research programme outlined here sought to address a number of objectives, namely:

1. To identify and select the companies that were interesting as objects for studies.
2. To establish contacts, invite 8 companies for participation in the investigation and get the consent of their CEOs for conducting the interviews.
3. To conduct the first interview with 8 companies and fill the questionnaires.
4. To analyse the results of the interviews, select 4 companies meeting the project requirements for the second interview, and get approval of the CEO to conduct the second interview.
5. To conduct the second round of interviews.
6. To analyse the results and prepare the report.

Both of the questionnaires that were administered through this research phase can be found in Appendices I and II. A number of meetings were held with dairy associations and dairy market experts so as to assist in the identification of potential research participants. Following the meetings it was possible to draw conclusions that had clear implications for respondent firm recruitment:

- Size and role that a company plays in the market. The dairy market has experienced significant consolidation, for example in 2005 only ten companies accounted for over 50% of cheese production.
- The percentage of sales that are exported. It was important to involve four companies with positive export experience and four companies that had not exported or had insignificant export sales structure levels. Such a sampling approach would enable comparisons to be drawn between the two groups, and best practice to be identified, thus enabling more effect internationalisation practices.

▪ Geographical location. There are differences in supply chain management for dairies in different regions and it was therefore necessary to consider and include companies buying milk from various geographical locations.

▪ Openness of a company and willingness to assist the research team. Clearly there is no obligation on the part of firms to participate, so a degree of willingness was necessary, also it had to be clear that companies / respondents were prepared to be open in terms of past experiences and access to information. There was little point in including a firm that was not prepared to fully share their experiences or be honest in terms of subjects under investigation.

It became clear later (when conducting the second interview) that another criterion, the product portfolio, is also important. The performance and strategy of exporters can depend on product type. For example, casein and powder milk are B2B goods and the approach to their export is different from B2C goods such as cheese or dessert products.

The export context is illustrated in Fig. 1 and Fig. 2, where the export structure is shown, as well as the share of the Russia Federation in total exports of Ukrainian dairy goods.

Fig. 1 Structure of the Ukrainian dairy export in 2005, mln USD

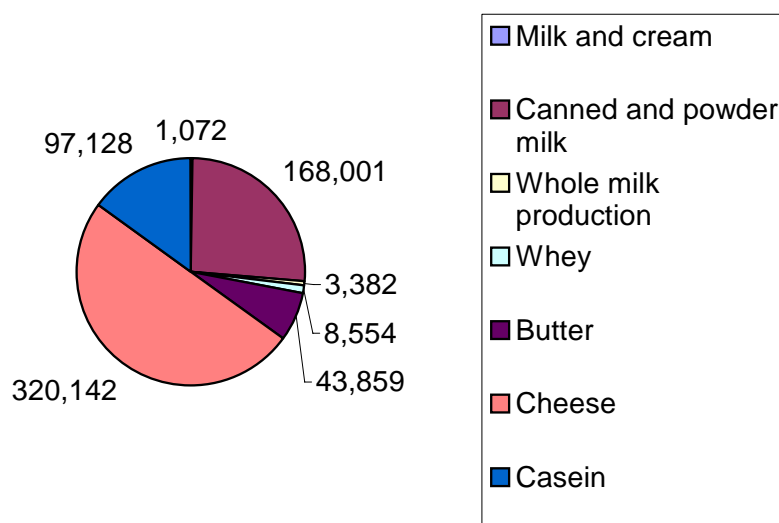
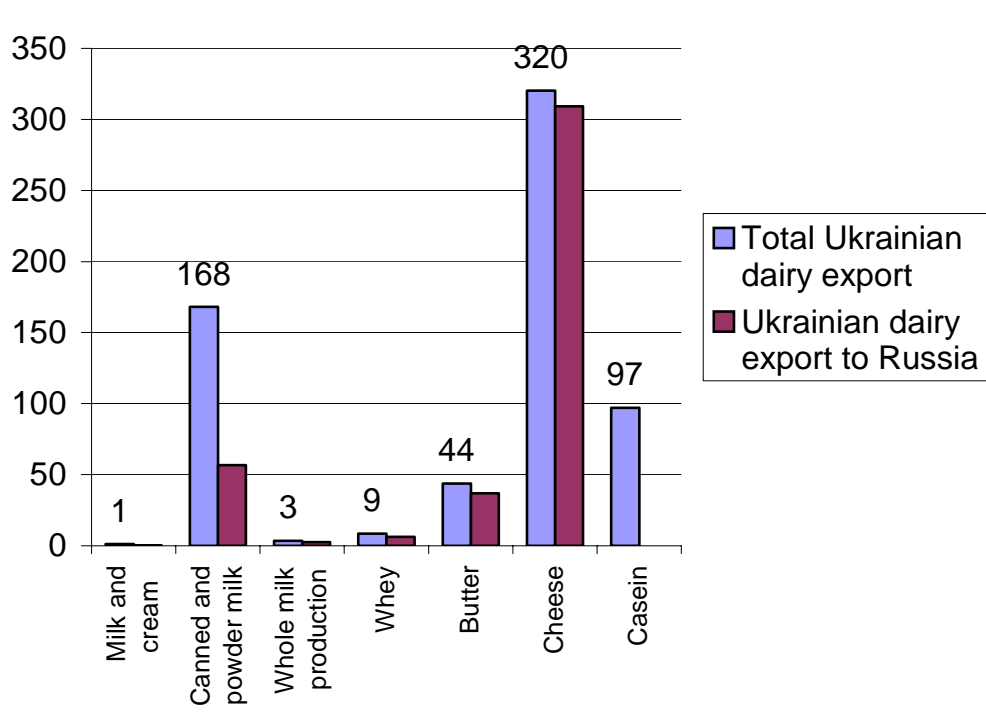


Fig. 1 Structure of the Ukrainian dairy export in 2005, mln USD



At this stage the following conclusions were drawn:

- Less than 1% of whole milk products produced are exported.
- The organisational structure of the largest dairies is such that sales are fulfilled through trade companies, which can be a part of a holding company controlling a few dairies located in different areas. Some dairies in the holdings are used purely as procurement centres for the larger dairies.
- The Russian export ban introduced at the beginning of 2006 changed the strategy and sales structure of some large domestic companies and led to increased competition in the domestic market.
- The ban also resulted in a significant decrease in the prices paid for milk in 2006 and, as result, a decline in milk production.

After the eight companies had been selected and contacted, it turned out that although no company directly refused to participate, most companies expressed no real enthusiasm for the study. The successful exporters saw no incentive to sharing best practice. The companies that had cut their export or had insignificant export sales did not see how the project could help them improve their performance.

In order to overcome the anticipated problems inherent in having reluctant participants the firms included in the sample was increased to twelve.

Companies initially included in the study were:

1. UKRAINE 1
2. UKRAINE 2
3. UKRAINE 3
4. UKRAINE 4
5. UKRAINE 5
6. UKRAINE 6
7. UKRAINE 7
8. UKRAINE 8

The companies added to the study were trading companies distributing goods of some of the dairies listed above.

1. UKRAINE 9
2. UKRAINE 10
3. UKRAINE 11
4. UKRAINE 12

The first two companies are exporting significant percentages of their goods, whilst the other two decreased or stopped exporting during 2006.

3. Supply chain relationships of exporting and non-exporting dairies

The first set of interviews were conducted to compare the supply chain relationships of exporting and non-exporting dairies. The questionnaire administered at this stage is presented in Appendix I. Among the four exporting companies selected for interviews were UKRAINE 9 and UKRAINE 10, for whom exporting represents a significant percentage of sales revenue. The other two companies, UKRAINE 4 and UKRAINE 12, stopped or significantly decreased export operations in 2006 as a result of the Russian export ban. The remaining four companies UKRAINE 1, UKRAINE 3, UKRAINE 2, AND UKRAINE 7 were the non-exporters.

It is important to note that to avoid confusion the first interviews were conducted at *dairies*. While the second interviews related to trade/marketing export challenges were conducted with *trade companies*. The large holding companies normally include a few dairies located in different areas, where the relationships with farmers among them can vary dramatically. The consolidated analysis for a whole holding company would require more interviews and more quantitative questions to clear up the situation with the supply chain management.

It is also necessary to outline the competitive environment in which dairies found themselves in the fall of 2006. Due to the ban imposed by Russia at the beginning of the year, a large volume of products stayed in Ukraine that would normally have been exported and as a result there was significant surplus of milk present in the market which resulted in a dramatic drop in the purchase price for milk. The introduction of minimal purchase prices by government did not entirely eliminate the farmer losses and their consequences. The number of milking cows and the amount of milk available sharply decreased by October 2006. Estimates of the severity of the decrease vary between 10% and 30%. The net effect of this fall was that dairies faced winter milk shortages that were more severe than might otherwise have been expected. It is also worth noting at this point that 70-85% of total milk is produced by householders.

Although the small number of interviews conducted preclude quantitative analysis, it is possible to draw some relevant qualitative conclusions. Dairies can be divided into three categories depending on their supply structure. Dairies of the first type build regular relationships with corporate farms and the main share of the milk they buy comes from there. They have stable relationships with the owners/managers of the farms, often they introduce stable prices for the milk and usually they help the farms to produce both larger quantities of milk and improve the quality of milk produced. Normally the milk coming from corporate farms is of a higher quality when compared to milk collected from householders or bought from traders.

The second category comprises the dairies which have built networks of collection stations, where individual farmers can bring milk or where dairy tankers can deliver milk collected from householders. The milk is tested and cooled at the collection stations. It is extremely important to cool the milk as soon as possible to prevent bacteria propagation. However, some interviewees indicated that milk supplied by householders is usually of lower quality compared to that delivered by large corporate farms. There are three reasons for this. The first is hand milking. It will be very difficult if not impossible to decrease bacteria content without replacing hand milking with machine milking. The second factor is the manner in which livestock are fed. The protein content is usually less than 2.95% and it can not be improved without critical changes in feeding. The third factor is generally poor hygiene in livestock management, as a result of which milk delivered to the collection stations and cooled there is of lower quality than the milk sourced from large corporate farms.

Finally the third group is comprised of dairies employing their own tankers to collect milk predominantly from householders, but also from traders. Milk from this group is of the lowest quality. It is mostly milk supplied by householders and is not cooled on delivery to the milk collection tanker. As a result, the bacteria continue propagating whilst the tanker is collecting additional milk on its route from village to village.

The dairies of the first two types suffered less from the Russian ban and volatile market conditions. Their suppliers are normally more stable and loyal to their main buyer. The type of the dairy is determined by question 1.1 in the questionnaire I. The Table I illustrates how the types of dairies interviewed are distributed and correlated to some other key issues of the questionnaires administered.

Table 1 Comparison of 8 dairies.²

No	I	II	III	IV	V	VI	VII	VIII
Type	3	1	2	1	2	3	3	2
Guaranteed price	N	N	Y	N	Y	N	N	N
Support of farm	N	N	Y	Y	Y	Y	N	N
Export sales	Low	Low	Growing	Decreased	High	Decreased	Declined	No

It is also interesting to consider interviewees perceptions of future prospects for raw milk production. Before 1990 –1992 milk was mainly produced by co-operative (kolkhozes) farms. The infrastructure was well developed and most villages had farms and equipment for testing, cooling and even processing milk. Since the beginning of the 1990s changes in both society and the economy have resulted in the demise of most farms and kolkhozes. As a result, milk production has dropped by about 45%, the number of cows in kolkhozes has decreased significantly, whilst the number of cows owned households has increased. The supply infrastructure was almost destroyed, kolkhozes were transformed into agri-enterprises, and some of them kept the farms, however many farms were closed and abandoned. Until 2003 the dairy business was not profitable, whilst other agri-sectors demonstrated significantly higher performance. As a result of these changes, milk from householders now constitutes between 70 and 85% (depending on the region) of product. However, some interviewees believe that the situation will improve during the next 5-8 years. In some regions the countryside demographic situation is such that most householders are retired elderly people, with the young migrating from rural to urban areas. It will lead (as some interviewees consider) to a gradual decrease in the number of cows owned by households. Meanwhile agri-enterprises, dairies, and companies from other sectors are planning to invest in large farms. Mid-size farms (between 30 and 80 cows) are nearly non-existent, as household farmers are not capable of handling so many cows.

² The number of a dairy in the table does not correspond to the number of a dairy in the list above.

A need for greater use of technology and better farm management is needed, interviewees argue that assistance in developing pilot projects would be useful.

With regards to selecting suppliers (question 1.3) we can conclude that when working with householders the distance and location is the most important factor, whilst in cases where a supplier is a corporate farm the quantity and quality of the milk supplied is the top priority. When buying milk from traders the dairies give priority to both quantity and minimum quality of milk delivered.

As for the contract relations, all dairies purchase milk from enterprises on a contract base (corporate farms and traders), but do not use written contracts when buying milk from householders. Two companies indicated that they guaranteed prices in contracts with constant suppliers, another company indicated that they are going to introduce guaranteed prices in 2007. The same companies stated that they support corporate farms with at least one measure.

All dairies pay out premium for milk of higher quality and pay higher price for larger quantity of milk delivered.

The dairies use various payment schemes when buying milk. Usually they pay once/twice a week (or ten days) when buying from householders, once a week / two times a month when purchasing milk from corporate farms and in this case they can credit a farm when needed. In summertime dairies can out to traders regularly and usually traders allow the dairy credit. In wintertime traders require prompt payments.

Dairies working with corporate farms and getting a significant share of their milk from them support the farms with machinery, credit, guaranteed prices, veterinary support etc. The dairies of the third type do not offer support to farms or have abandoned support programs.

We failed to find any linkages between export performance and supply change relationships. Despite the fact that the three types of dairy receive milk of different quality, dairies of any type can be (un)successful in exporting their goods. The more important factor in determining export likelihood appears to be the amount of milk they can purchase and process.

4. Qualitative interviews on export performance

The second round of interviews were conducted with four companies, two exporters and two companies that do not export or for whom export sales were insignificant. The questionnaire for the second round of interviews is given in Appendix II. The interviews with successful exporters were conducted with UKRAINE 9 and UKRAINE 10. Both companies are related to multi-profile businesses controlling a few dairies and with trading companies as part of their holdings. Both companies are also involved in business outside of manufacturing and trading dairy products. Both companies have permission to export to Russia. Their main product groups are (1) B2B goods - milk powder and casein; (2) B2C goods - cheese.

The other two companies interviewed are UKRAINE 12 and UKRAINE 11. UKRAINE 12 stopped exporting to Russia in 2006 due to the ban. UKRAINE 11 used to be oriented to export sales before 2006 (with nearly 80% of their sales exported to Russia), however when the ban was introduced their export market disappeared overnight.

The companies who are significant exporters are active in both B2B and B2C products. However, both product groups should be considered separately, because market situations and distribution systems differ considerably. Until 2006 cheese exports dominated the dairy export structure (nearly 320 mln USD, about 50% of total dairy exports) and about 85% of exported cheese was sent to Russia. The Russian market is attractive for cheese manufacturers, because it is large and growing. At the same time the Russian market is fragmented into regions due to large distances, lack of logistics centres and poorly developed retail networks. The market is poorly structured and not over supplied with dairy goods. Most retail sales are achieved through marketplaces and small outlets. Consumer preferences are similar to those seen in the Ukraine. The cheeses with small holes (the *Rossijyskiy* group) are most popular, and are positioned in the medium and low-price segments. The CIS market is the traditional market for these cheeses. The companies consulted do not export their cheese outside the CIS, because:

- (1) Traditional CIS products are not typically popular in other countries;
- (2) Markets with higher margins and market capacity (like EU countries) are closed to most Ukrainian dairy products due to strict requirements and certification;
- (3) At present the state of the primary raw milk market makes improvements in milk quality very difficult. Despite capital investments in production assets of dairies, the quality of the products is still not sufficient to meet the needs / requirements of developed economies;
- (4) Dairy production is restricted by the volume of the milk available on the market;

(5) There are large markets in the Russian regions and other CIS countries, where existing products are both in demand and competitive.

Although some dairies are able to manufacture cheese of higher and premium quality, they are not competitive in these segments due to high relative costs when compared to competitors from other countries (Germany, the Netherlands, Poland, Argentina, etc). According to interviewees this barrier will not be overcome without subsidies for the Ukrainian dairy farms.

According to one interviewee from a successful exporter it would be wrong to suggest that the Russian market is more profitable than the Ukrainian one. The exporters therefore export to Russia to diversify risks and to increase total sales to achieve 'economies of scale'. The Russian market is larger and not so saturated with cheese as the Ukrainian market. Two interviewees from the other successful exporter and a company that reduced export consider that the CIS market is more profitable than the Ukrainian one, while the profitability of cheese exports outside CIS is lower. Meanwhile three of the four companies interviewed also export powder milk to some Asian markets. Exports of cheese outside the CIS by companies interviewed was fairly insignificant, with the maximum proportion of sales being less than 6%. The target group of consumers in these countries (USA, Israel, Germany, Austria and others) is immigrants from the CIS countries.

Both successful exporters have employed largely the same strategy, using the Russian export ban as an opportunity to build their distribution / wholesalers network in the Russian regions, and maximise presence retail outlets and marketplaces. They have also sought to harmonise their product portfolio and pricing policy to address medium and low-price segments. They have therefore used fragmentation and the ban / non-transparent structure of the Russian market to expand their sales, while some strong competitors have not been allowed to operate there. The companies also employ traditional promotion sets to support their sales through distributors on the large markets. The companies have not invest in opening their representative offices or creating joint ventures during this period, because they do not think it is a sensible solution. They did not mention any formal procedure for developing strategy, and strategy has been evolved through contingency.

The answers to questions of Section 4 indicate that market activities are being developed and there is scope for future development. One can conclude that the critical success factors for exporting to Russia are

- (1) Permission to export to Russia.
- (2) Sufficient stock of dairy products of mid and low-price segments.

- (3) A need to diversify export activities and develop other export markets.
- (4) Trading and export experience, as well as background of a trade company.
- (5) 'Safety margin' in sales and sufficient working capital.
- (6) Size of a dairy (or dairies) and product structure.

Two of the four companies mentioned indicated that the domestic economic environment does not encourage dairy export, one former exporter said that the environment had encouraged dairy export till the end of 2005, the fourth company stated that the environment neither encouraged, nor discouraged export. Interviewees stated that support for farmers should be increased and subsidies and lower interest rates are needed to stimulate investments in dairy farming. They also declared that the government should resolve the problem of paying VAT back to exporters.

Interviewees believe that international development agencies can contribute to stimulation of the export market through:

- Providing access to inexpensive credit for developing the agri-sector and upgrading production.
- Providing technical assistance for developing large farms, and introducing a model of small-size farm (20-70 cows).
- Encouraging co-operation between Ukrainian dairies and foreign partners.
- Conducting explicit market research.

5. Reflections on the research process

The most difficult issue we faced when performing the study was reluctance on the part of managers to participate and disclose the information required. Managers did not see any incentives for them in participating in the interviews. The management of dairies is such that to get permission to enter a company to conduct the study it was necessary to get the approval of the CEO or owner. The decision making process was sometimes rather slow and bureaucratic.

The first round of interviews were relatively simple and did not take a lot of time. The second set took about two hours and some managers asked if they could first answer questions in writing and then clarify any questions during the interview.

We did not have experience any difficulty in getting the answers during interviews. However, sometimes we faced some confusion situations. For example, when getting answers to questions about export turnover we have to distinguish income obtained from B2B goods and B2C. The markets are different and the export context varies from one product group to other. Some questions are difficult to answer by a sales director, because those questions concern the whole holding not just the trader.

It was necessary to ask exporters directly about critical success factors, because some of them were not explicitly touched upon by questions in the questionnaire.

6. Conclusions

The studies were conducted with 8 dairies and 4 trading companies to identify export led growth and factors determining Ukrainian dairy export and the development of internationalisation strategy. It was found that at present supply chain relations with farmers are not critical for export performance, but they may become crucial next year when dairies may suffer a lack of available milk. There is tendency towards deepening differences in relationships between dairies and farms. Some dairies have started to develop closer relations with large farms to better secure the quality and amount of milk they get from corporate farms. Other dairies rely on their network of collection stations as a means of getting milk from householders. Others collect milk from householders by tanker and buy milk from traders. Although the dairies continue combining the three approaches to get milk, one of the three ways usually dominates each of the operations studied. The dairies anticipate shortages in milk supply over the next two to three years, as a result of the Russian export ban and resulting raw milk price deflation.

Comparison of exporting and non-exporting dairies led to the conclusion that the most successful exporting companies have large production capacities and access to sufficient quantity of milk to manufacture products for export. Successful exporters also had permission to export to Russia, the most important market for Ukrainian B2C dairy goods. These conditions seem to be the most important factors for success for Ukrainian cheese exporters. Some exporters have clearly benefited considerably from having the opportunity to export to the Russian market during the ban, whilst their competitors did not.

1. Appendix I. Questionnaire 1

Draft relationship dairy - farmer

Section 1: Milk procurement

1.1	What share of your total milk supply was purchased from:			
		Year 2002	Year 2004	2006 (current)
	a/ milk collection stations			
	b/ private farms directly			
	c/ co-operative farms			
	d/ other processors			
	e/ milk traders			
1.2	<p>If you have stopped or diminished milk purchases from any of the above categories, please explain the main reason(s) for doing so.</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>			
1.3	<p>How did you select farms, companies or organizations that can deliver milk to you? (e.g. minimum quantity of milk sold; minimum milk quality; vicinity to the dairy company; reputation; membership to a professional association; ...). If there is more than one factor that you take into account, please specify which of the factors are most important to you.</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>			

Section 2: Contracts

2.1	What share of milk supply per category was purchased using contracts:			
		Year 2002	Year 2004	2006 (current)
	a/ milk collection stations			
	b/ private farms directly			
	c/ co-operative farms			
	d/ other processors			
	e/ milk traders			
2.2	What is specified in the contracts (answer with YES if specified, NO if not):			
	a/ Quantity of milk that will be delivered/bought			
	b/ Frequency of delivery			
	c/ Minimum quality requirement			
	d/ Price			
	e/ Mode and speed of payment			
	f/ Premiums for quality and/or large quantities			
	g/ Penalties for not fulfilling the terms of the contract			
	h/ Exclusivity clause (suppliers are not allowed to sell milk to other buyers)			
	i/ Other (please specify) _____			

Section 3: Prices

3.1	<p>What price did you pay for your purchased milk in the summer season 2006? (local currency /ltr)</p> <p>Minimum: _____</p> <p>Average: _____</p> <p>Maximum: _____</p>
3.2	<p>What price did you pay for your purchased milk in the winter season 2005/6? (local currency /ltr)</p> <p>Minimum: _____</p> <p>Average: _____</p> <p>Maximum: _____</p>
3.3	<p>Do you pay a price premium for the delivery of large quantities? (please specify)</p> <p>_____</p> <p>_____</p> <p>_____</p>
3.4	<p>Do you pay a price premium for high quality milk? (please specify)</p> <p>_____</p> <p>_____</p> <p>_____</p>
3.5	<p>Do you pay a price premium for a fat content in the milk higher than 3.6 %? (please specify)</p> <p>_____</p> <p>_____</p>

3.6	How is the payment of your suppliers organized? e.g. pay the whole amount at the time of delivery; or pay a percentage at the time of delivery and the rest later; or pay everything after a certain time period; or another arrangement. Please specify _____ _____

Section 4: Services

4.1		What programs do you offer to your suppliers (Yes /No)	Since when do you offer these programs (Year)	Is there a minimum size (of deliveries) requirement for farms that want to use this program? Please specify
	Credit including loans and forward payments. If granted specify term i.e. 3 months, year etc.			
	Physical Inputs (e.g. seeds, feed, including pre-financing feed etc.)			
	Machinery If granted, specify whether rented, free or on lease:			
	Transportation If granted, specify whether rented, free or on lease:			
	Specialised storage If granted, specify whether rented, free or on lease:			
	Guaranteed prices			
	Veterinary Support			
	Business and financial management support			
	Harvest & handling support			
	Farm loan guarantees (given by processor to banks)			
	Investment loans			
	Quality control			
	Prompt payments			
	Market access			
4.2	What do you think the main impact of these programs is for your company, and for your supplier? _____ _____ _____ _____ _____ _____ _____			

3.3	<p>What were the main reasons for this choice of distribution strategy?</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
3.4.	<p>Have you modified any of your products to better meet the needs of export markets?</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
3.5	<p>To what extent does your export marketing differ from domestic marketing activities in terms of:</p> <p>a) pricing _____</p> <hr/> <hr/> <hr/> <hr/> <hr/> <p>b) promotional activities</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <p>c) packaging</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

Section 4: Management and Organisational Factors

4.1	<p>What means do you use, if any, to search for export opportunities and establish contacts with buyers?</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>
4.2	<p>Does the company undertake market research on export markets? If yes, discuss nature of research (type of research, how often conducted).</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>
4.3	<p>If appropriate, how is market research on export markets used within the firm (e.g. aid decision making, identification of market opportunities)? To whom is market research on export markets disseminated within the company?</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>
4.4	<p>Who makes the decisions within the company on export strategy?</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>
4.5	<p>Does the company have a marketing / export marketing department? If yes, what are its functions / responsibilities?</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>
4.6	<p>If appropriate, how many people work within the export marketing department? (number of full-time employees)</p> <p>_____</p>
4.7	<p>Does the company know who its main competitors on export markets are?</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>

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4.12	<p>Have you faced any difficulties in meeting the private standards of international buyers? If yes, explore in detail. How did they overcome the problems?</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

Section 5: Feedback Effects

5.1	<p>What are the main lessons that you have learnt you're your recent exporting activities (last 5 years)? What advice would you give to others? Knowing what you know now, is there anything that you would have done differently with regards to your export activities?</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
5.2	<p>Have experiences / lessons learnt from exporting affected your domestic marketing activities? If yes, how?</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

Section 6: Environmental Factors and Future Plans

6.1	<p>What are the main barriers that you face in exporting? (Discuss trade policy, knowledge, quality etc)</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
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