

Supply Chain Survey (France, Netherlands and Belgium)

Final Findings

A survey conducted by
Coleman Parkes Research

STUDY DETAIL



METHODOLOGY

Phone to web



AUDIENCE PROFILE

Owners, C-Suite and Head/Directors responsible for logistics/supply chain strategy within their organisation

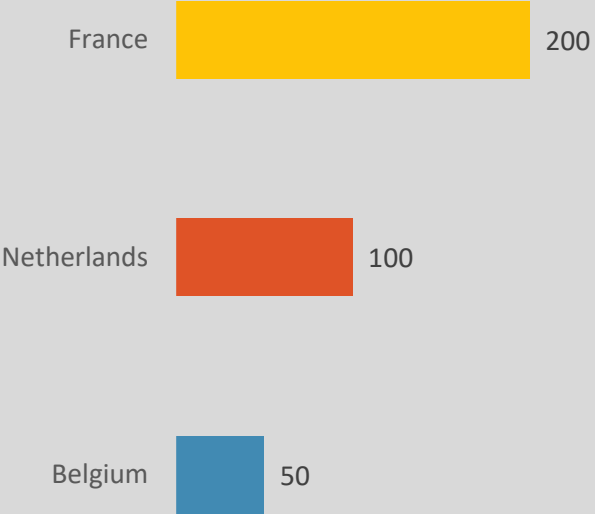


FIELDWORK DATES

October – November 2022

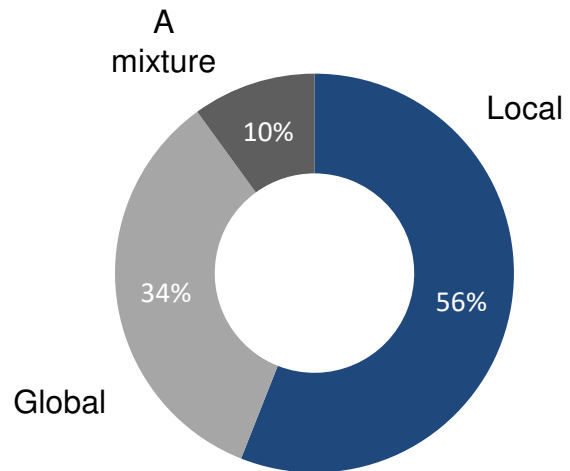


GEOGRAPHY

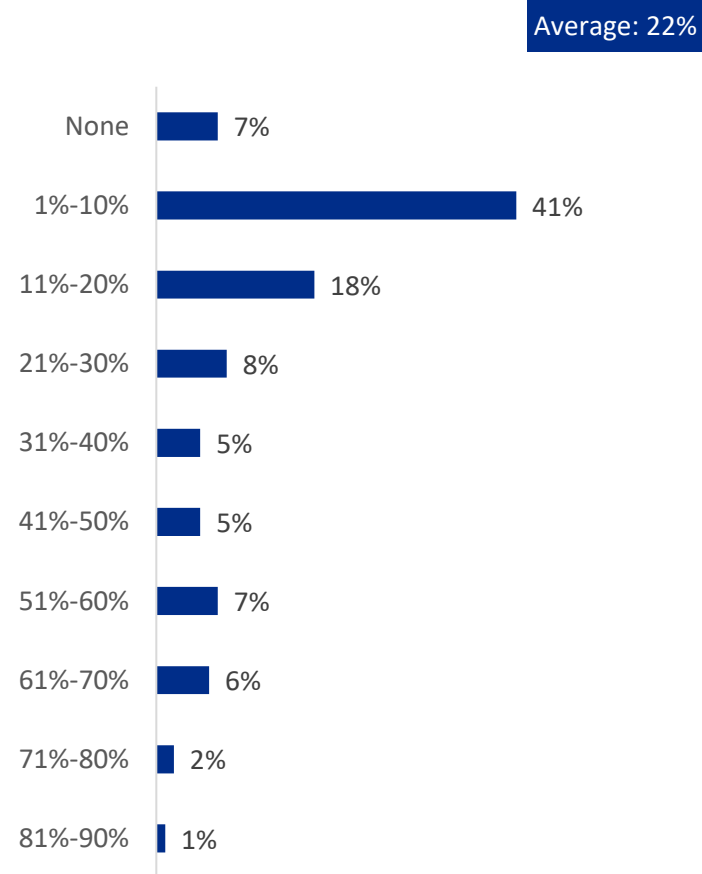


Audience profile

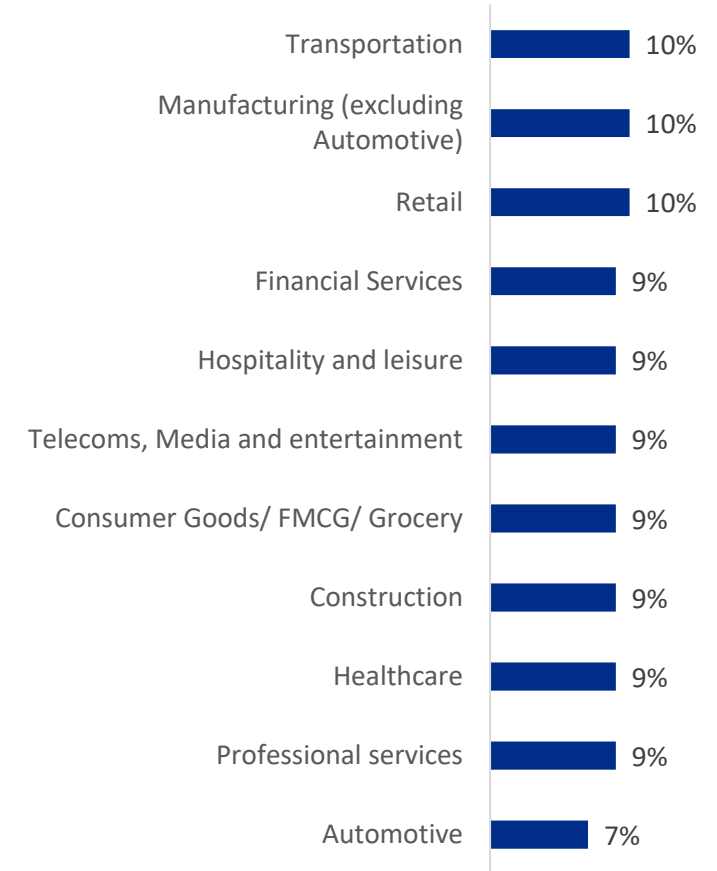
Primary markets



Proportion of online sales

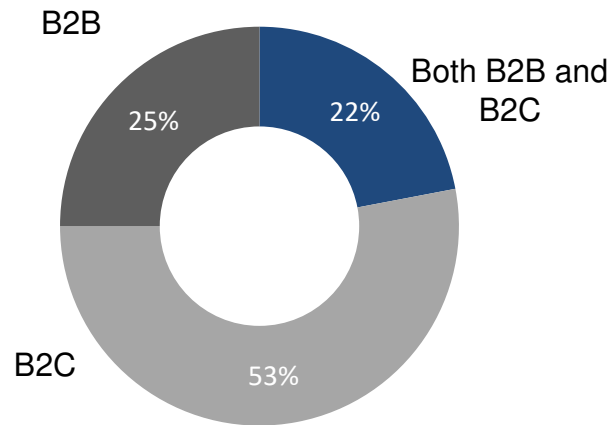


Sector

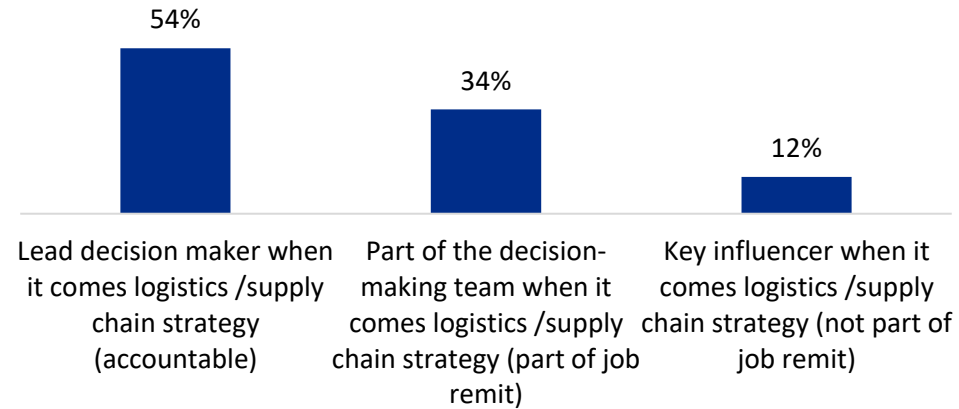


Audience profile

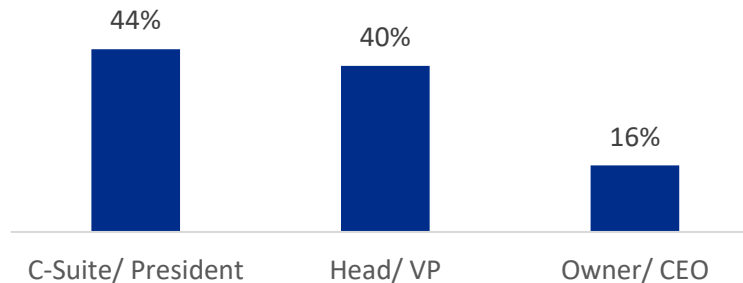
Business model



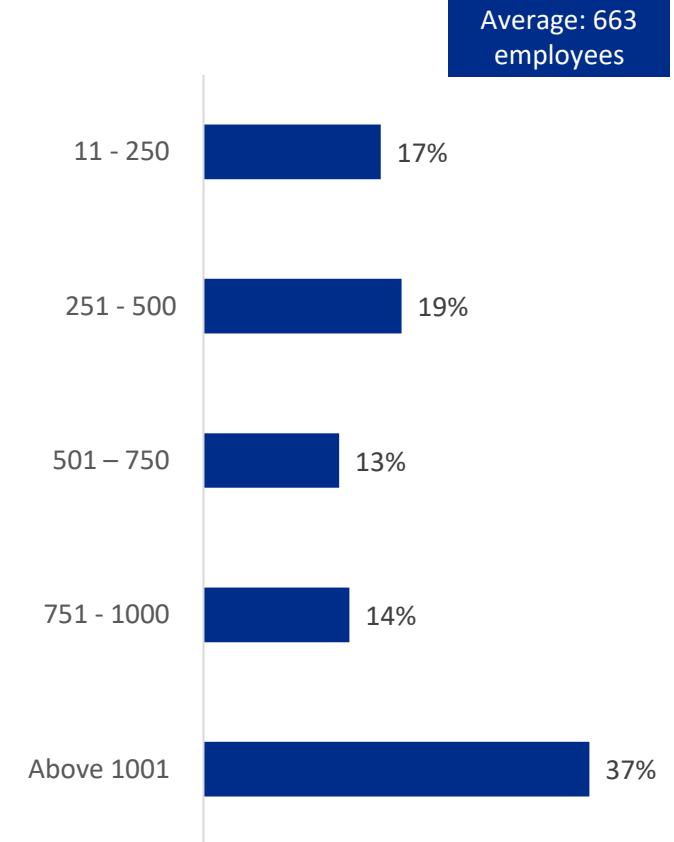
Responsibility



Job title



Number of employees

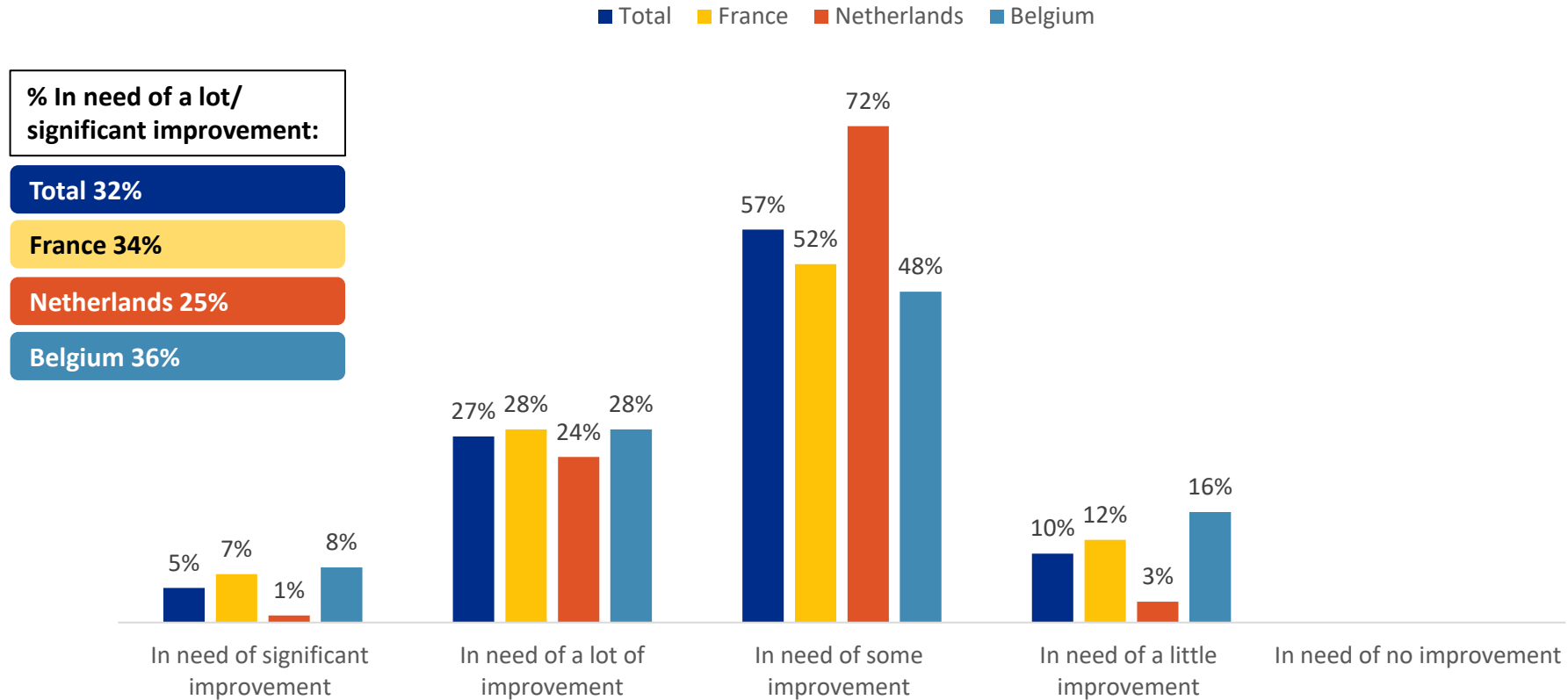


The title 'Key Findings' is displayed in a large, white, sans-serif font, centered within a dark, semi-transparent rectangular box. The background of the entire slide is a blue-toned, perspective-driven image of a long, brightly lit tunnel with a grid-like floor and ceiling, creating a sense of depth and movement.

Key Findings

Almost all organisations believe their supply chain needs improving to some extent. Almost a third (32%) think their supply chain needs a lot/significant improvement, with this figure rising to almost 4 in 10 in Belgium.

Current state of businesses' supply chains



Q.1. How would you describe the current state of your businesses' supply chain?

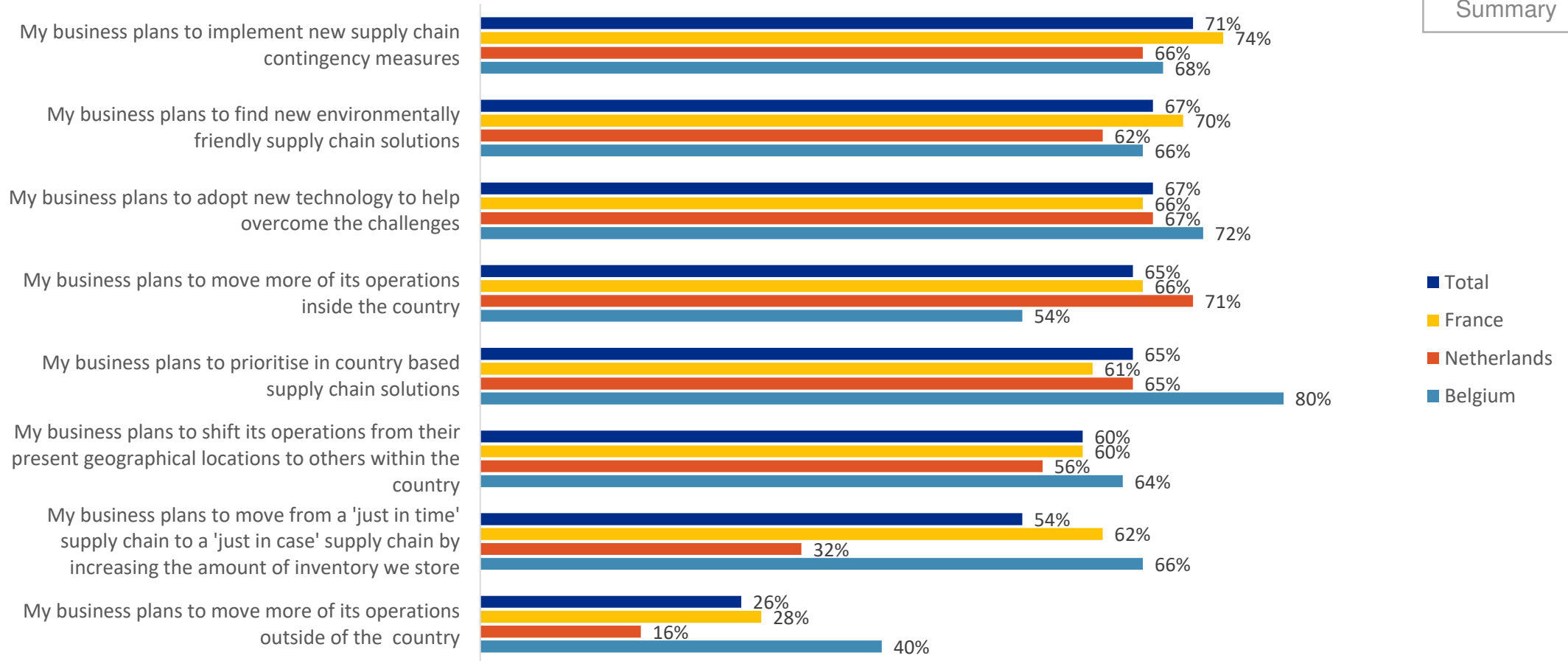
Single code question

Base: All respondents (350) France (200) Netherlands (100) Belgium (50)

Businesses are exploring various avenues to improve their supply chain, in particular looking at new contingency measures, new environmentally friendly solutions and new technologies.

Supply chain measures/solutions to be taken in the next 1-2 years

Yes
Summary



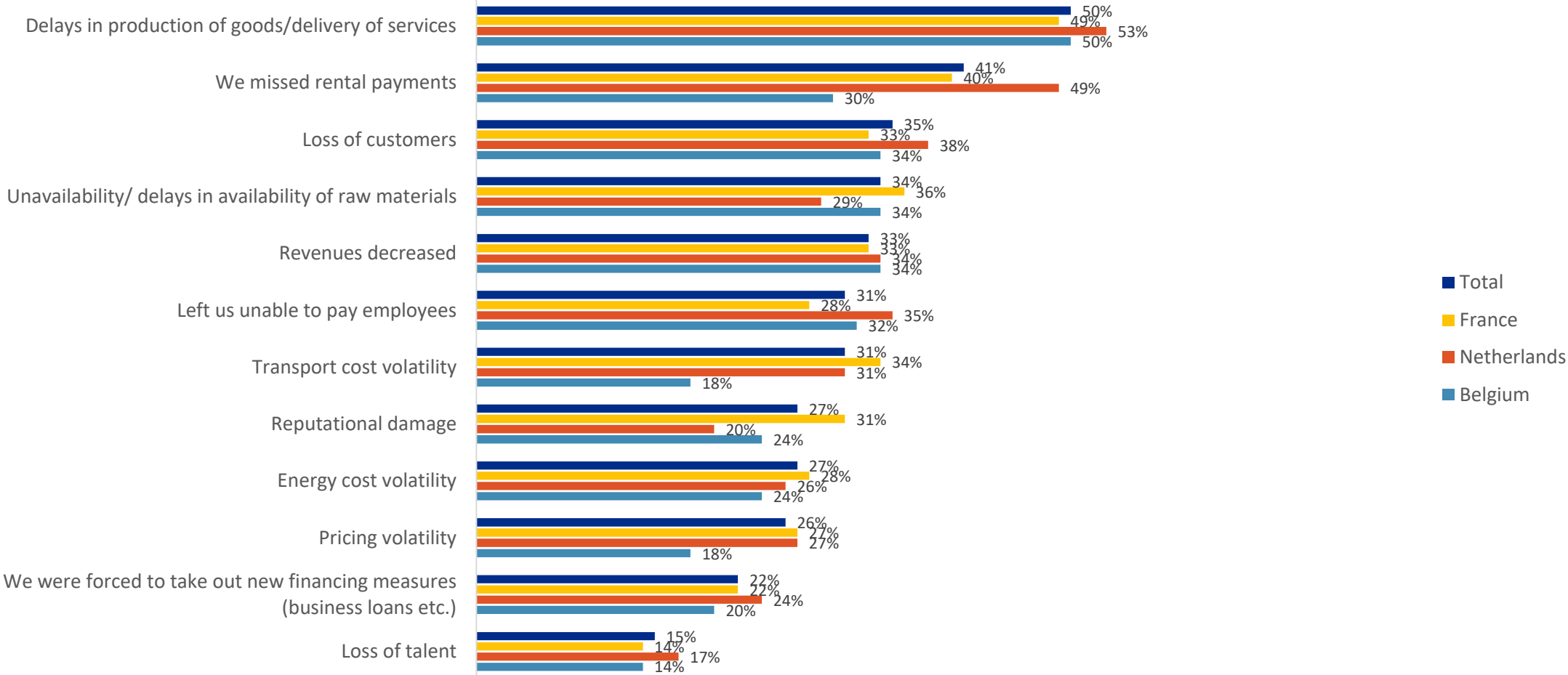
Q.2. Please can you tell us if your business is planning to undertake any of the following supply chain measures / solutions in the next 1 – 2 years?

Single code per row

Base: All respondents (350) France (200) Netherlands (100) Belgium (50)

Since 2020 supply chain issues have negatively impacted businesses in several ways, in particular through delays in the production of goods/delivery of services, missing rental payments (especially in the Netherlands), losing customers or facing issues around the supply of raw materials. An average of 4 different types of issues were identified by each business.

Impact of supply chain issues since the beginning of the pandemic



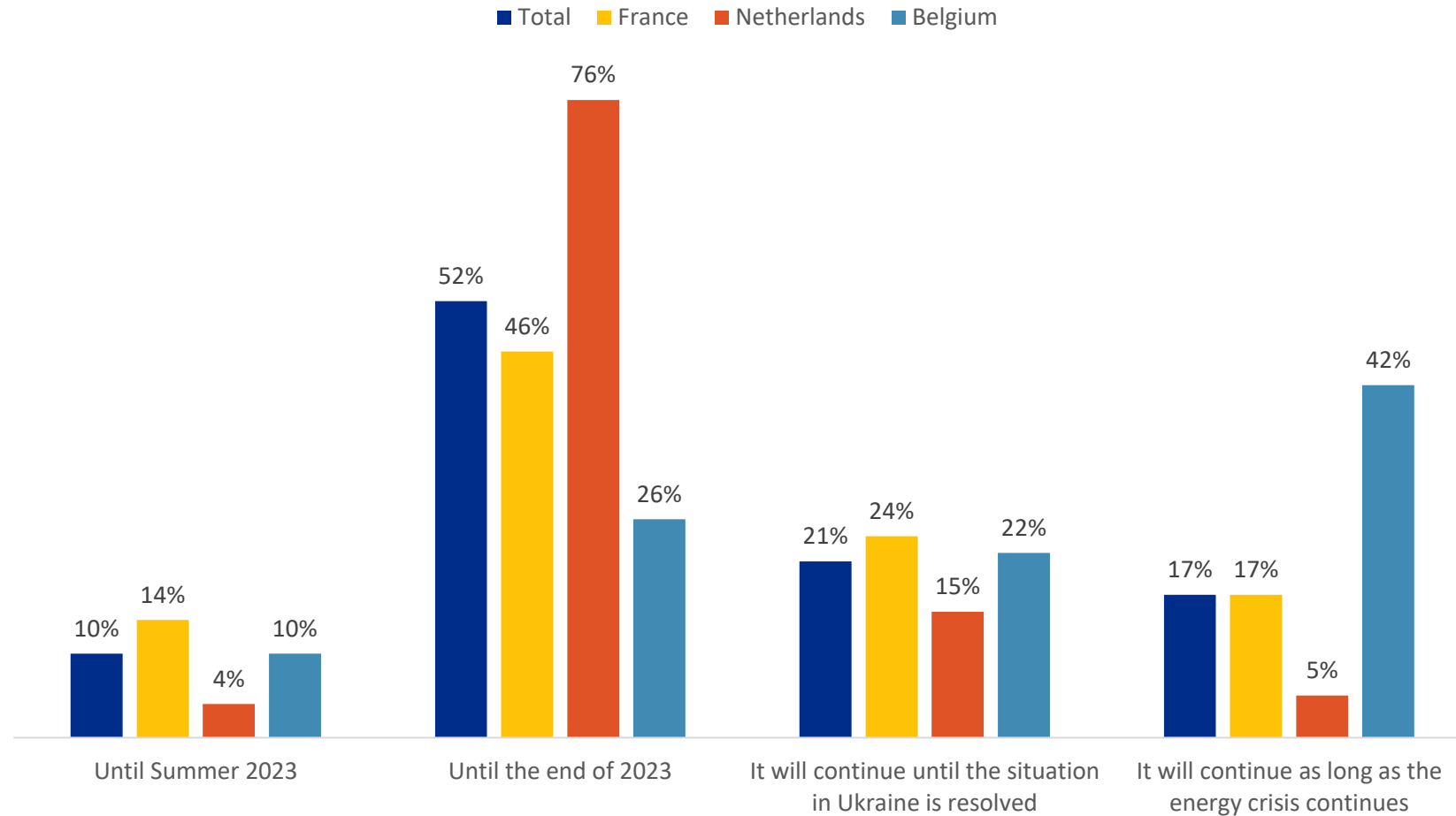
Q.3. How have supply chain issues affected your business since 2020 under the pandemic and micro-economic climate?

Multi code question

Base: All respondents (350) France (200) Netherlands (100) Belgium (50)

Half of businesses believe that their current supply chain issues will continue until the end of 2023, with only 1 in 10 predicting that these will be resolved by the end of the Summer. For almost 4 in 10, the duration of these issues is dependent on the resolution of key events; the situation in Ukraine (21%) or the energy crisis (16%).

Time span of supply chain issues



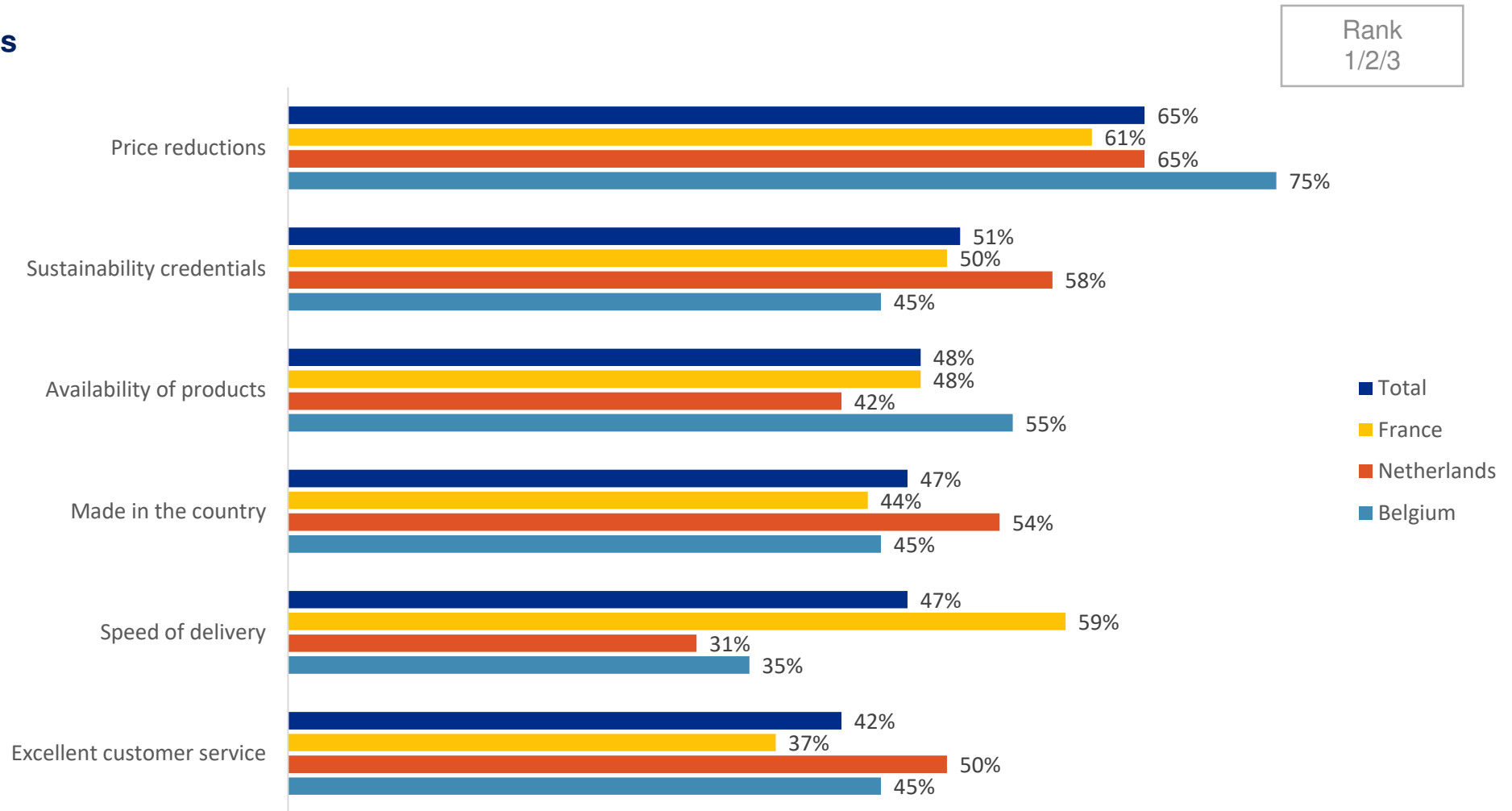
Q.4. How long do you think the current supply chain issues will last?

Single code question

Base: All respondents (350) France (200) Netherlands (100) Belgium (50)

Reflecting the economic climate, in the run up to Christmas this year, Retailers, Manufacturers and FMCG businesses believe their products' main selling point for consumers will be price reductions. However, just over half see sustainability credentials as a key selling point.

Main selling points for products



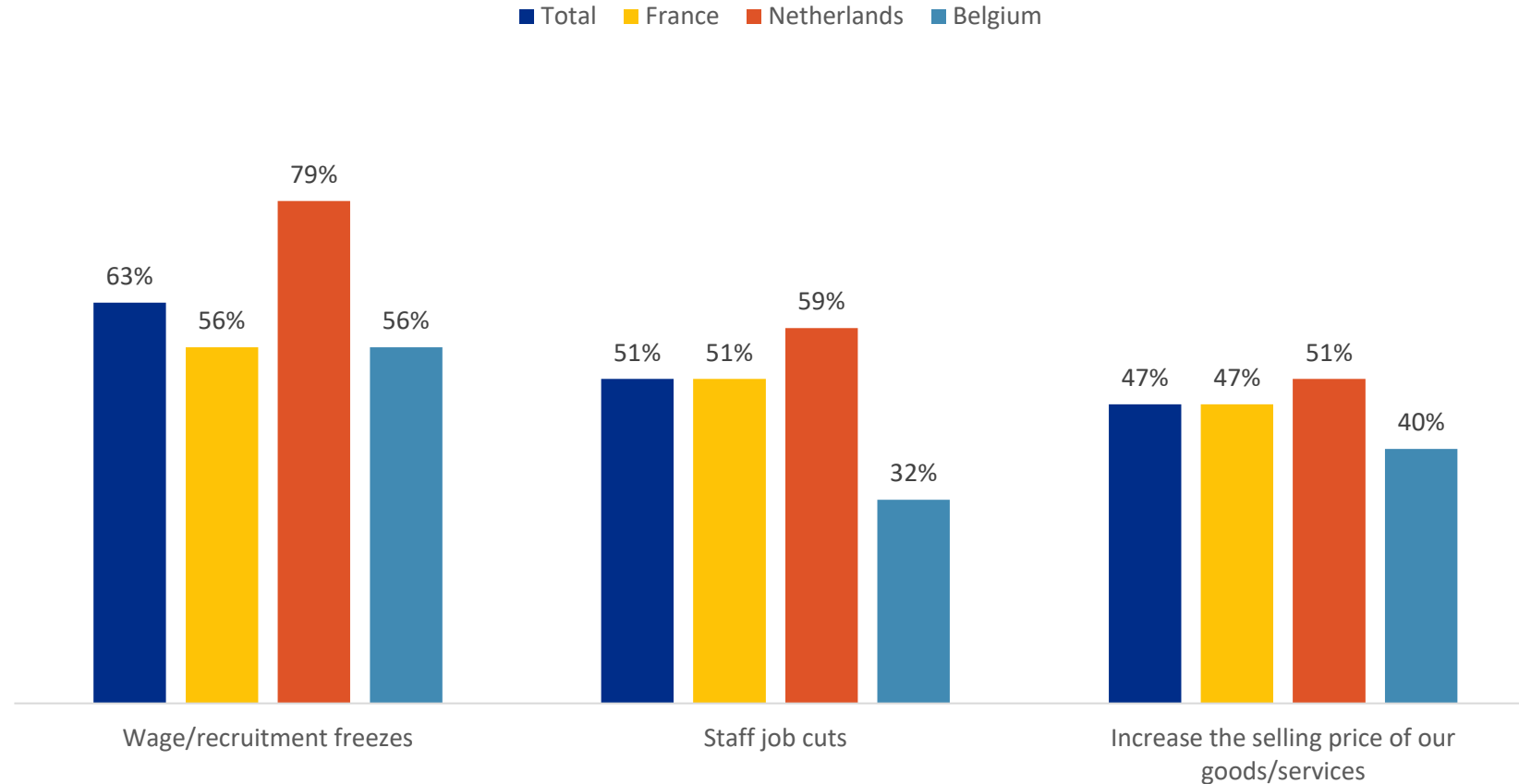
Q.5. Please rank the following in order of priority in terms of your products' main selling point to consumers in the run up to the holiday season 2022 (1 = biggest selling point, 6 = smallest selling point).

Rank all

Base: All respondents who selected 'Retail/Manufacturing/FMCG' at S3 (100) France (54) Netherlands (26) Belgium (20)

For many businesses, increasing the price of their products/services isn't an option to cover increases in supply chain costs. Instead staff will bear the brunt of any cost rise.

Sources to cover extra-cost of supply chain increases



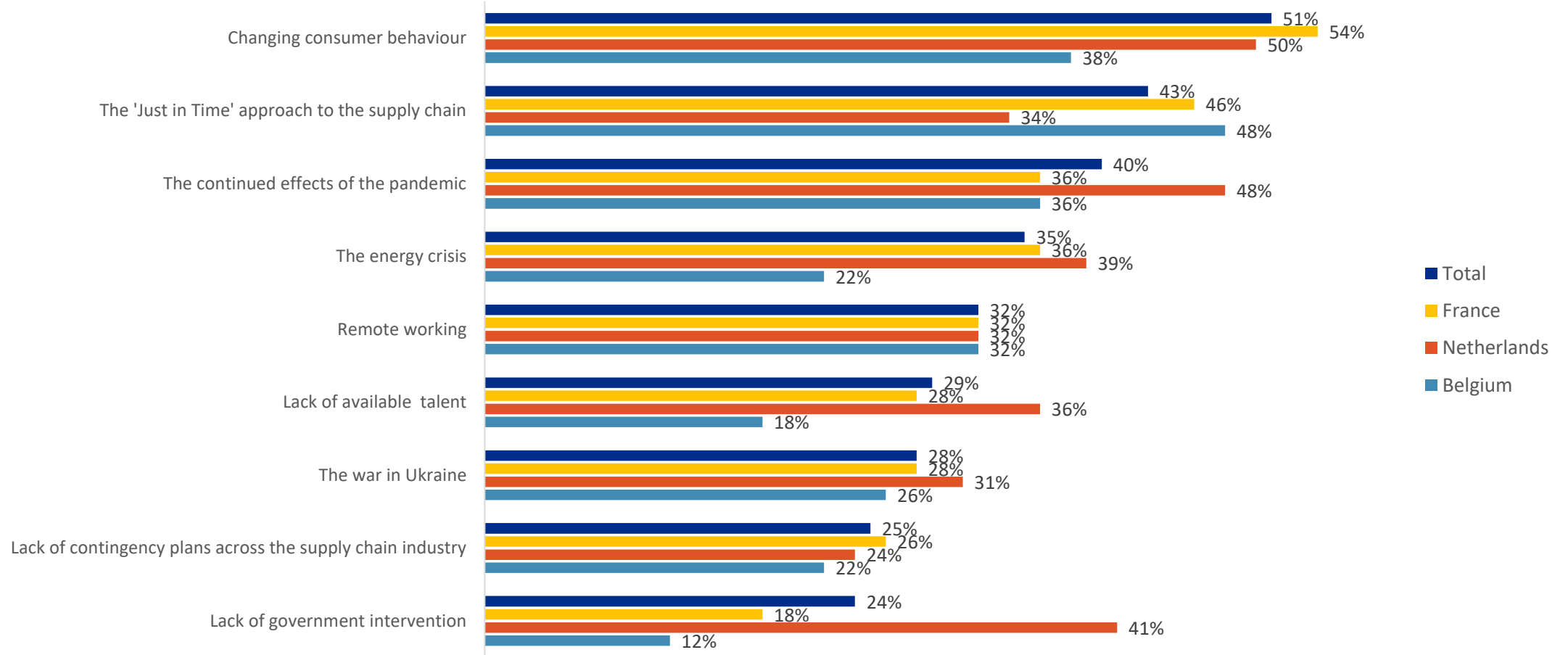
Q.6. If costs in the supply chain increase, where do you plan to recover the money?

Multi code question

Base: All respondents (350) France (200) Netherlands (100) Belgium (50)

Changing customer behaviour is the main factor causing current supply chain issues. An average of 3 factors per company were selected as contributors.

Factors contributing to the supply chain issues



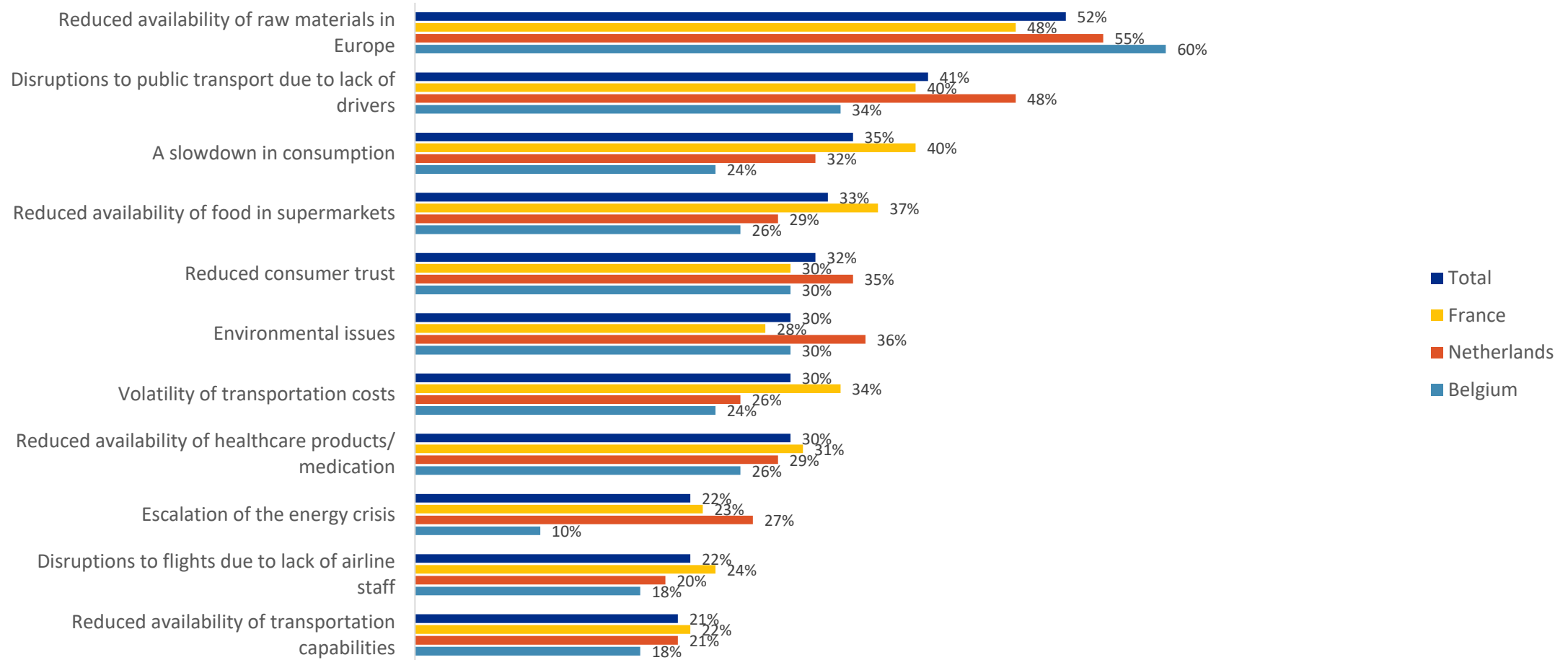
Q.7. In your view, who/what (if any) is to blame for the current supply chain issues your businesses is experiencing?

Multi code question

Base: All respondents (350) France (200) Netherlands (100) Belgium (50)

Several supply chain disruptions are expected to be ongoing in 2023, especially reduced availability of raw materials, disruptions to public transport, and a slowdown in consumption.

Supply chain disruptions expected in 2023



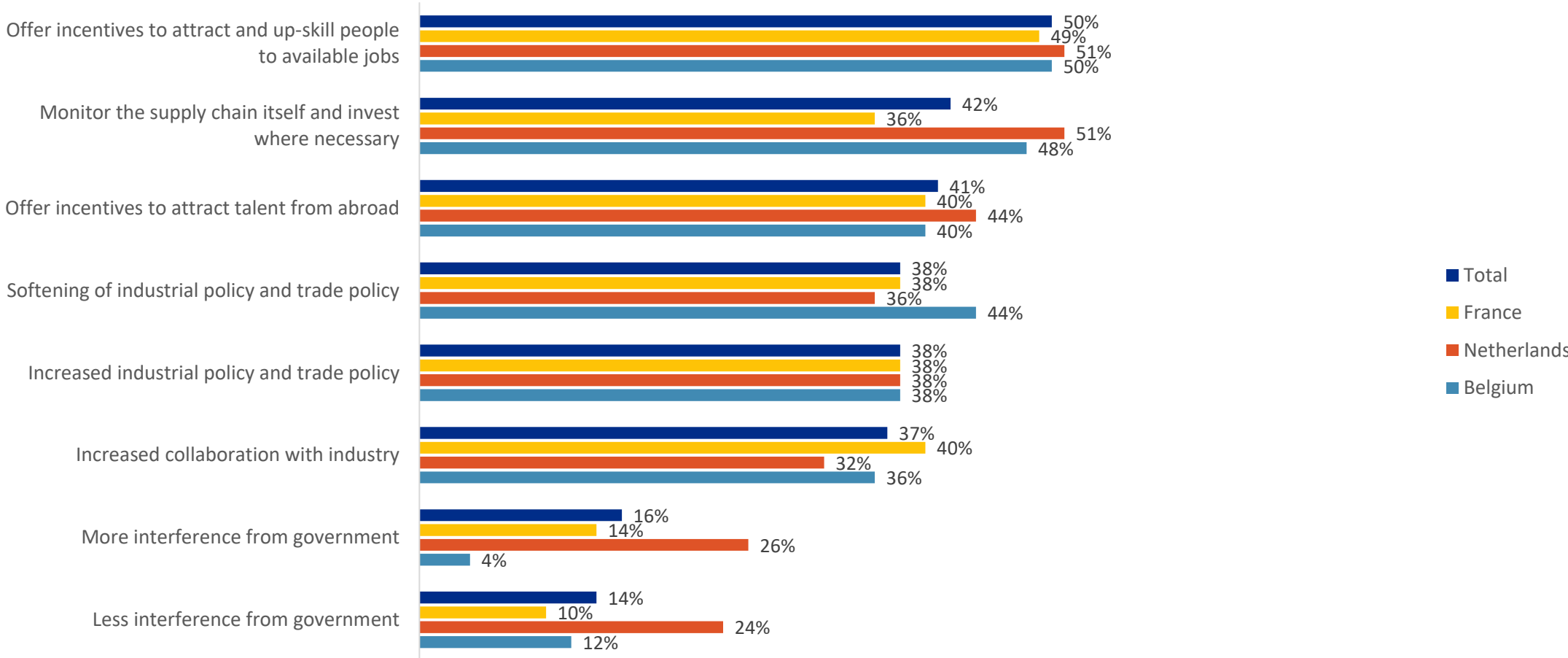
Q.8. In your view, which (if any) of the following supply chain disruptions do you expect to see in 2023?

Multi code question

Base: All respondents (350) France (200) Netherlands (100) Belgium (50)

Businesses would like to see the government offering incentives to help with workforce development/recruitment. They would also value monitoring of and investment in the supply chain.

Government actions to better support business



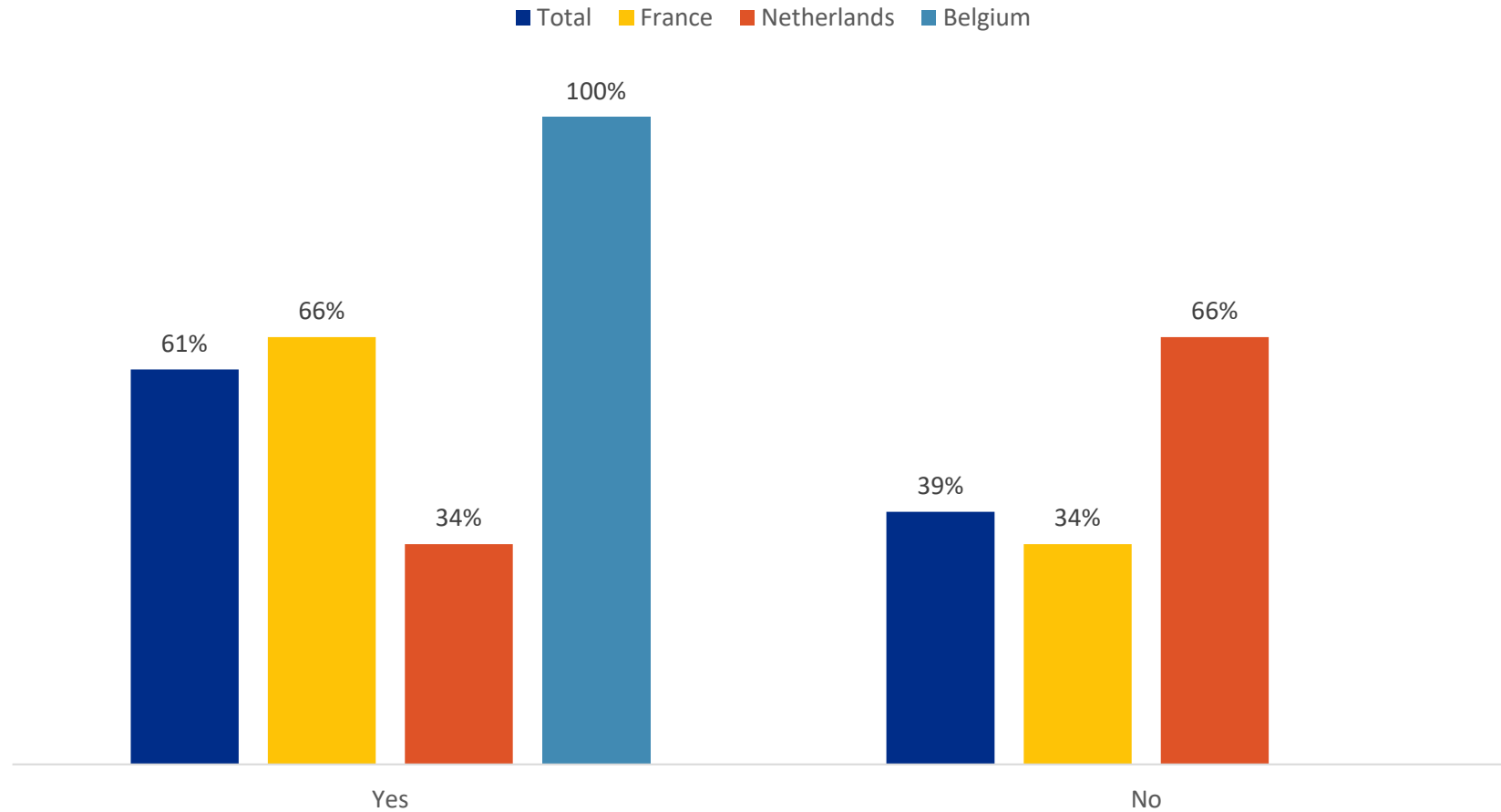
Q.9. How can the government better support businesses in the supply chain?

Multi code question

Base: All respondents (350) France (200) Netherlands (100) Belgium (50)

Around 6 in 10 businesses believe deglobalisation in supply chains would help economic growth. All of the respondents surveyed in Belgium hold this view.

Impact of deglobalisation



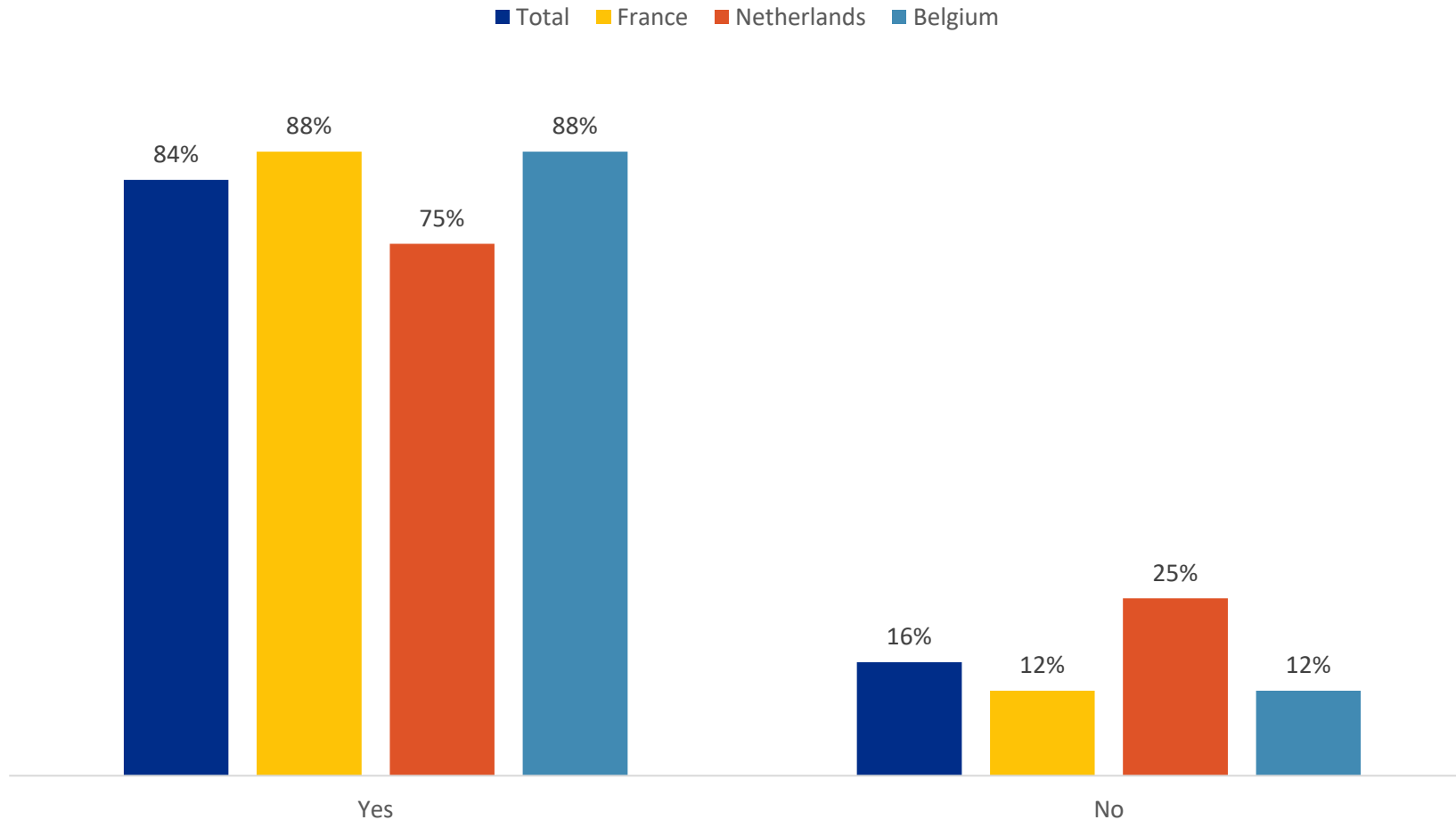
Q.10. Do you think that deglobalisation in supply chains would help economic growth?

Single code question

Base: All respondents (350) France (200) Netherlands (100) Belgium (50)

More than 8 in 10 businesses see a need to move on from a 'just in time' supply chain model to a 'just in case' model to overcome potential supply chain crises in 2023. This figure is close to 9 in 10 in France and Belgium.

'Just in time' vs 'Just in case' supply chain model



Q.11. Do you think that we need to move on from 'just in time' supply chains to 'just in case' supply chains to overcome potential supply chain crises in 2023?

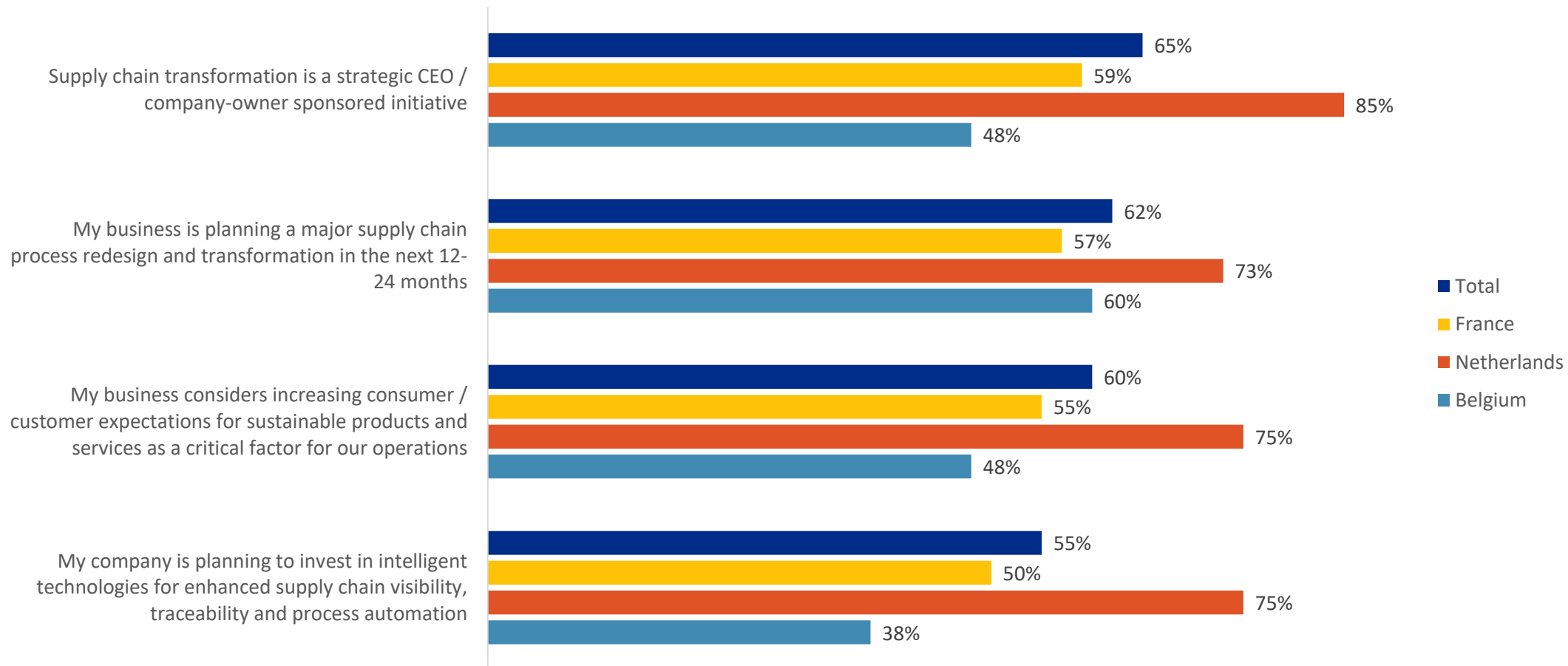
Single code question

Base: All respondents (350) France (200) Netherlands (100) Belgium (50)

Supply chain transformation is an important business priority. In almost two thirds of organisations this is an initiative sponsored at the highest level. Around 6 in 10 are planning a major supply chain transformation in the next 1-2 years and a similar proportion see customer expectations around sustainability as a critical factor for their operations. Just over half are planning to invest in intelligent technologies for supply chain improvements.

Supply chain prioritisation and drivers

% agree



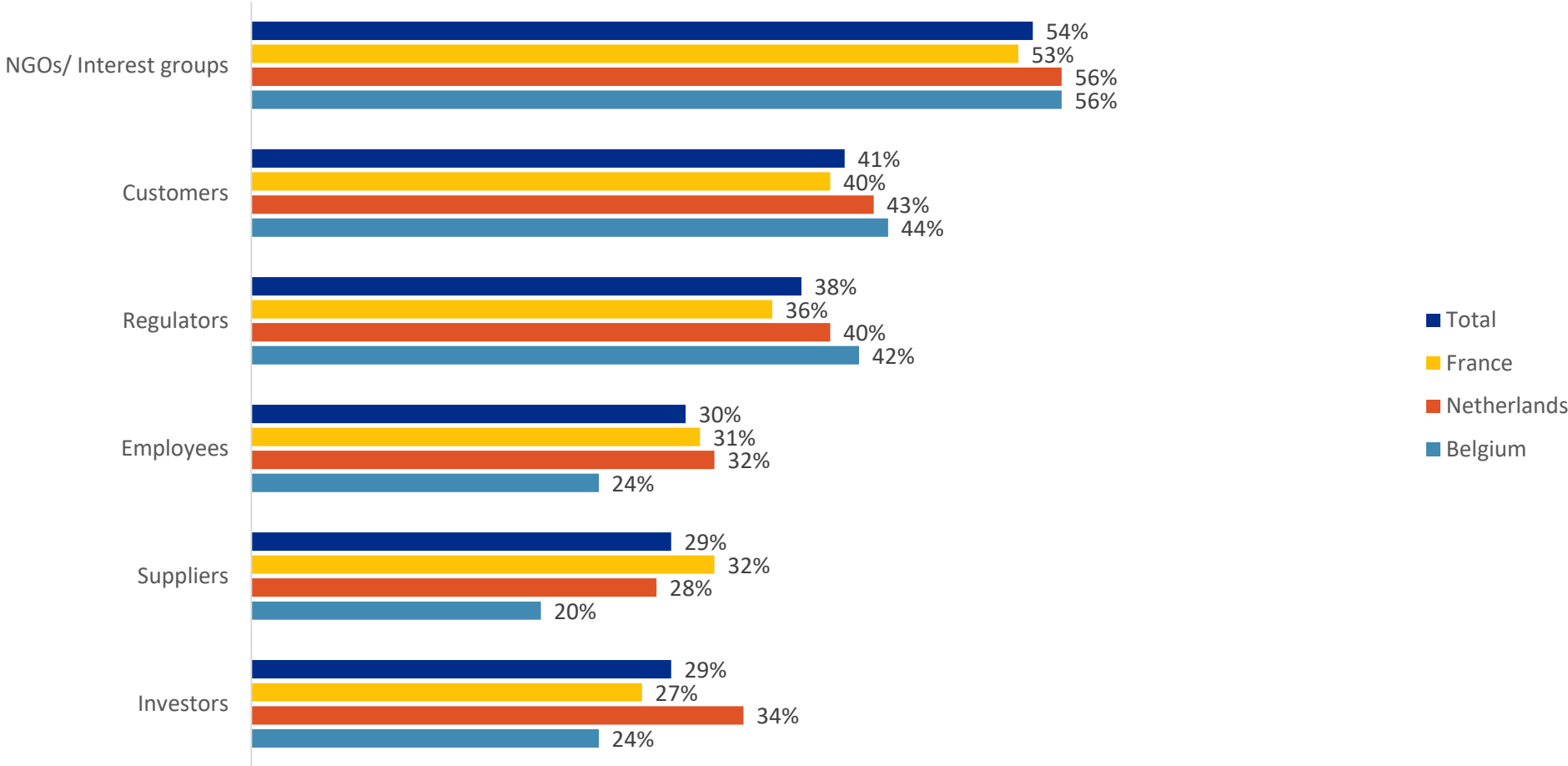
Q.12. To what extent do you agree or disagree with the following statements?

Single code per row

Base: All respondents (350) France (200) Netherlands (100) Belgium (50)

Businesses are most likely to be facing pressure from NGOs/ interest groups to focus on sustainability practices or targets, followed by pressure from customers and regulators.

Sources of pressure to focus on sustainability practices or targets



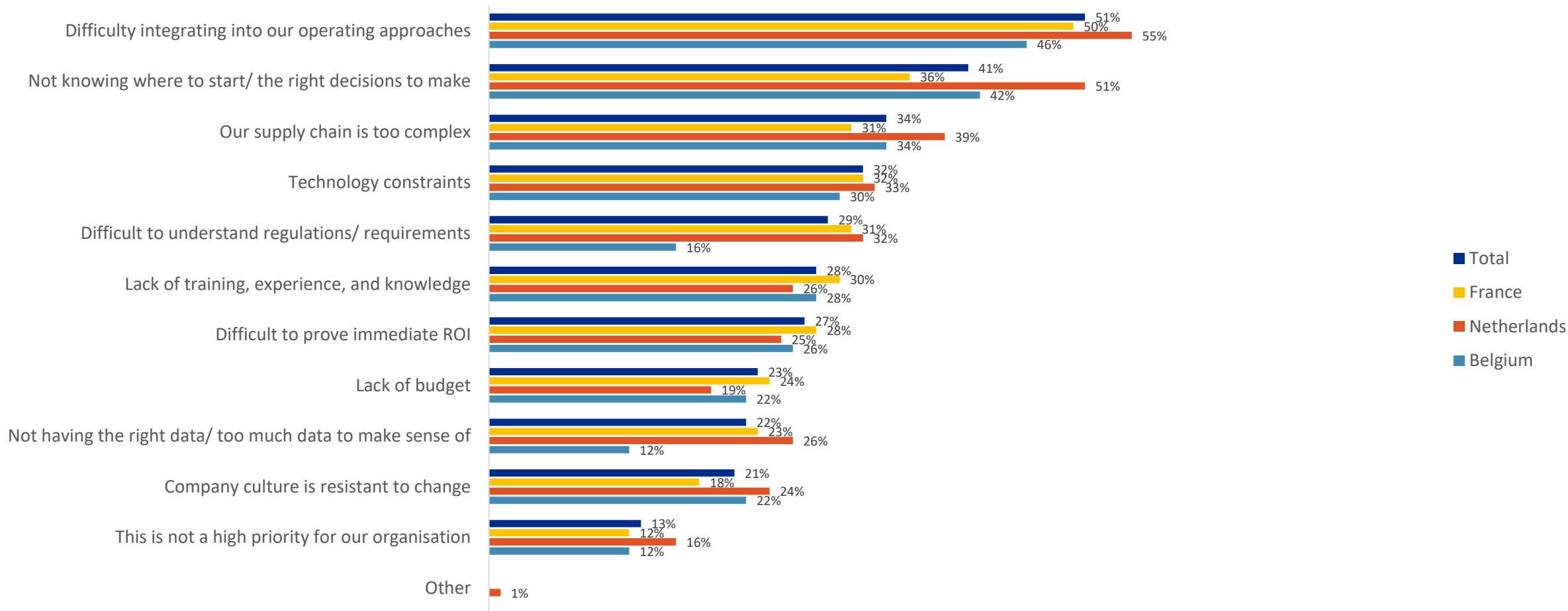
Q.13. Are you experiencing pressure to focus on sustainability practices or targets from any of the following sources?

Multi code question

Base: All respondents (350) France (200) Netherlands (100) Belgium (50)

Difficulties around integrating sustainability with operating approaches represents the biggest challenge to adopting sustainable practices or meeting sustainability targets. This is followed by not knowing where to start, complexity of the supply chain and technology constraints. All of these appear to be particular issues in the Netherlands.

Key challenges to adopting practices or meeting targets in relation to sustainability



Q.14. What do you see as the key challenges to adopting sustainability practices or meeting sustainability targets?

Multi code question

Base: All respondents (350) France (200) Netherlands (100) Belgium (50)

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