



# Agrievolution Alliance Covid 19 Global Impact Survey April 10, 2020

- Survey participants are the listed Agrievolution Alliance member associations whose responses reflect their knowledge of what is occurring within their own countries and what their agriculture equipment manufacturing member companies are experiencing.
- This survey will be conducted on a weekly basis for as long as it remains relevant and participation continues, with the first survey results published March 27, 2020.
- While the goal is to receive consistent responses from all Alliance members every week, some Alliance members may not respond and therefore their country will not be included in the results.

## Agrievolution Alliance Members

ABIMAQ, Brazil	AEA, UK
AEM, USA	ANSEMAT, Spain
ATMAK, Iran	AXEMA, France
CAMDA, China	CEMA, EU
FEDERUNACOMA, Italy	FICCI, India
JAMMA, Japan	KAMICO, Korea
ROSSPETSMASH, Russia	TARMAKBIR, Turkey
VDMA, Germany	

# Agrievolution Covid 19 Impact Survey Summary

Covering: EU, Brazil, France, India, Italy, Japan, Russia, South Korea, Spain, Turkey, UK, USA

April 10, 2020

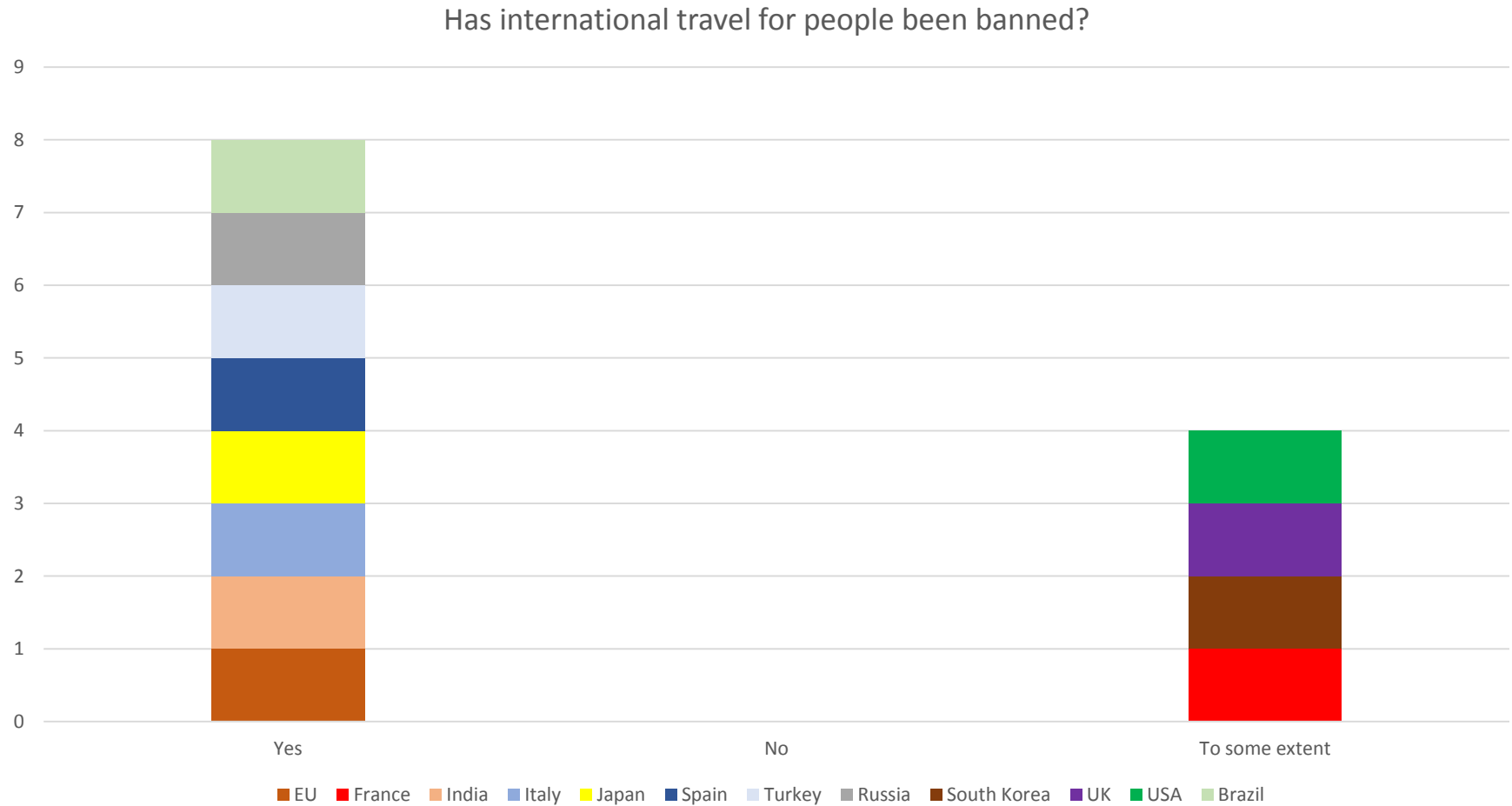


- Positive movement with both Spain and South Korea indicating Covid 19 has begun to level off. Italy indicating it is decreasing for first time.
- Volatility in the business climate from week to week as companies adjust processes to cope with virus impacts.
- 75% of reporting countries indicate a shortage of trucks to transport parts and equipment
- Eight out of twelve countries are seeing reductions of new orders of over 25%.
- Most countries facing boarder closings that are impacting transport of parts and equipment.



# Most countries are banning international travel

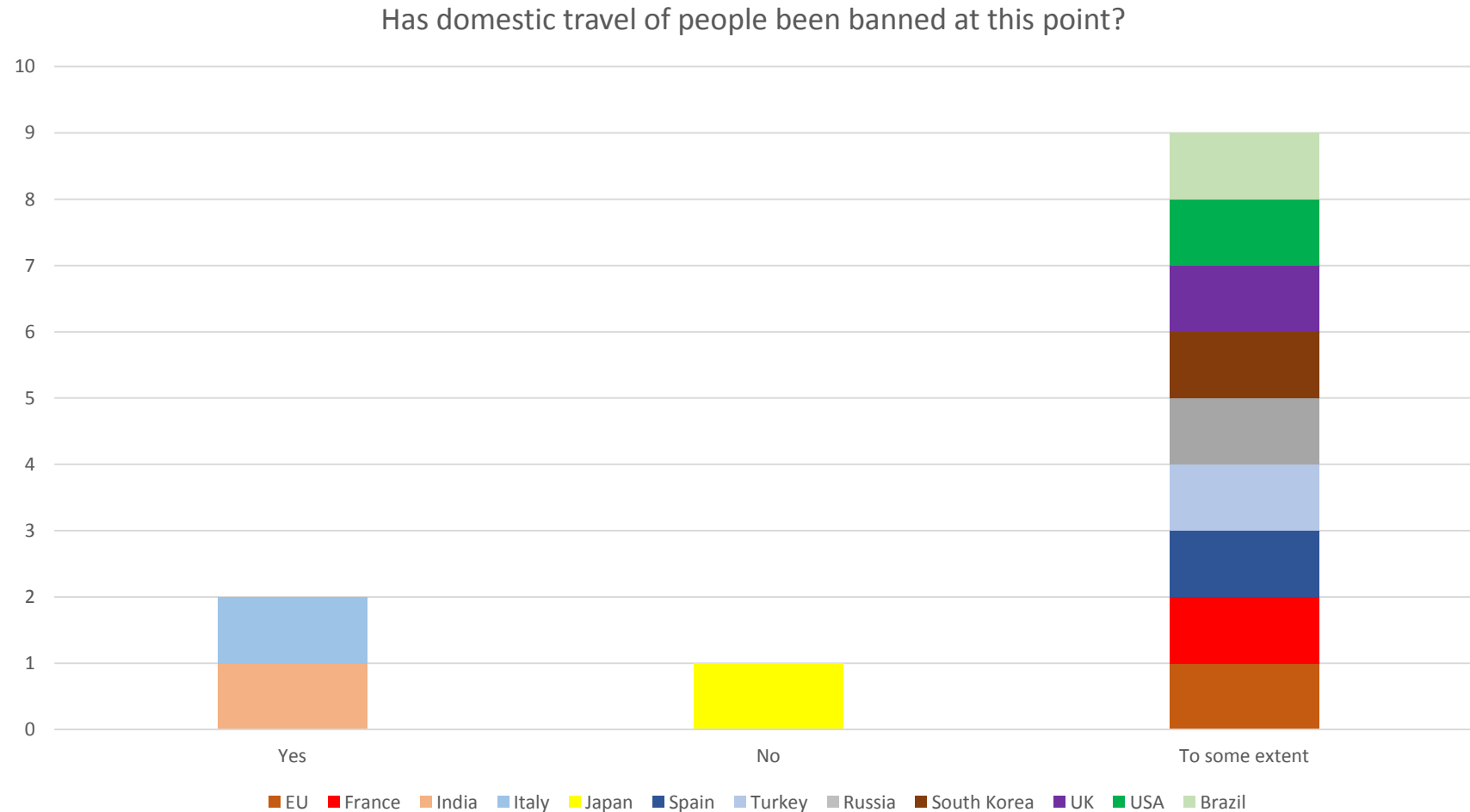
As of April 10, 2020, all countries are putting restrictions on international travel. The USA, UK, South Korea, and France have limited international travel to some extent.



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# Domestic travel is being disrupted

As of April 10, only Japan does not currently have domestic travel restrictions. All other regions continue to see restrictions on domestic travel.



## Imports and exports are being stopped in many regions.

As of April 10<sup>th</sup>, many countries are seeing some restrictions on movement of goods. France, Italy, Japan, Turkey, do not currently have restrictions.

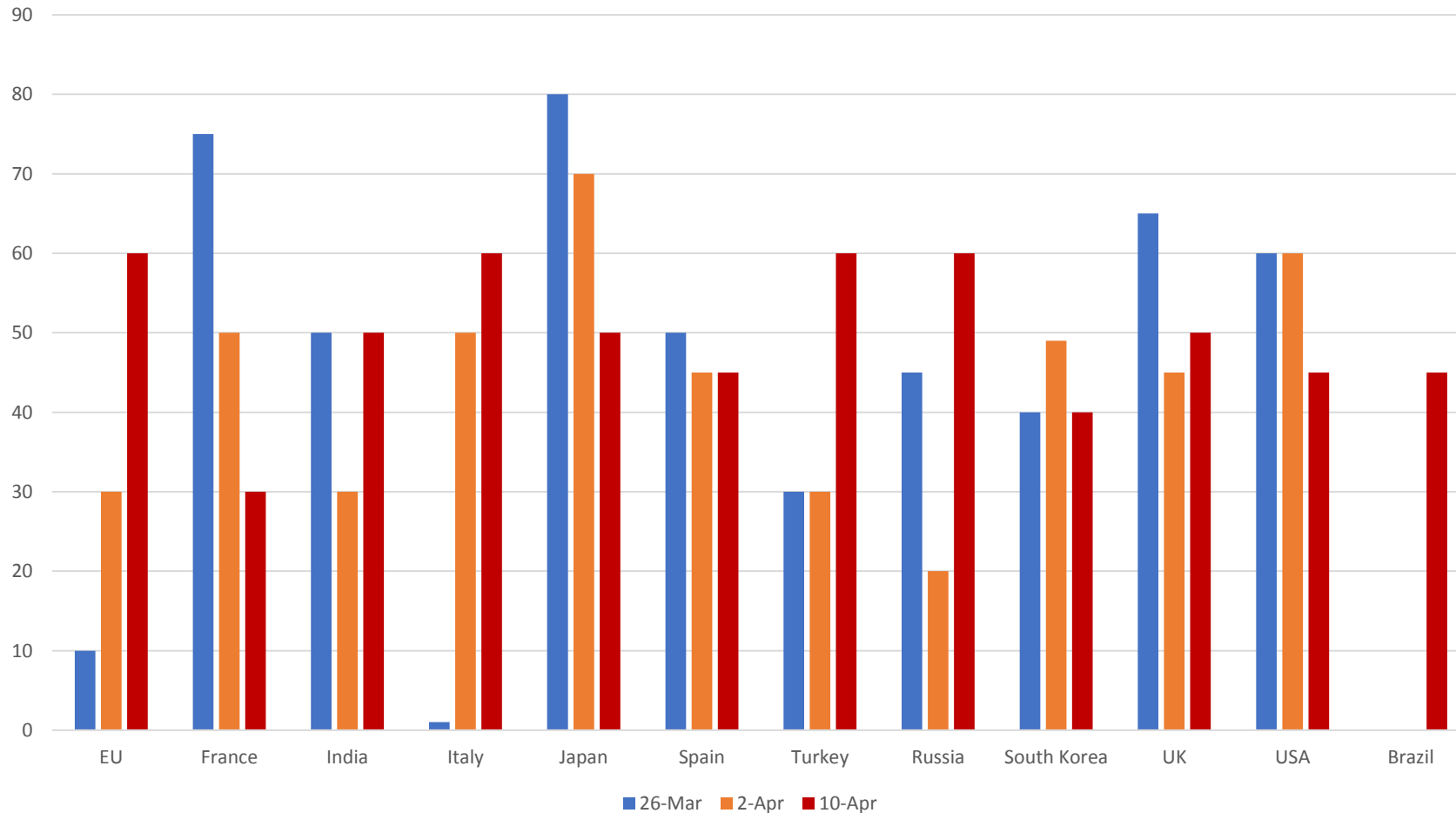
	Yes	No	To Some Extent
EU			X
France		X	
India			X
Italy		X	
Japan		X	
Spain			X
Turkey		X	
Russia			X
South Korea			X
UK			X
USA			X
Brazil			X



# Business climate is Deteriorating.

As of April 10, many regions continue to report a deterioration in the business climate. Many changes in processes are occurring as businesses cope with the virus creating large swings in the business climate week to week.

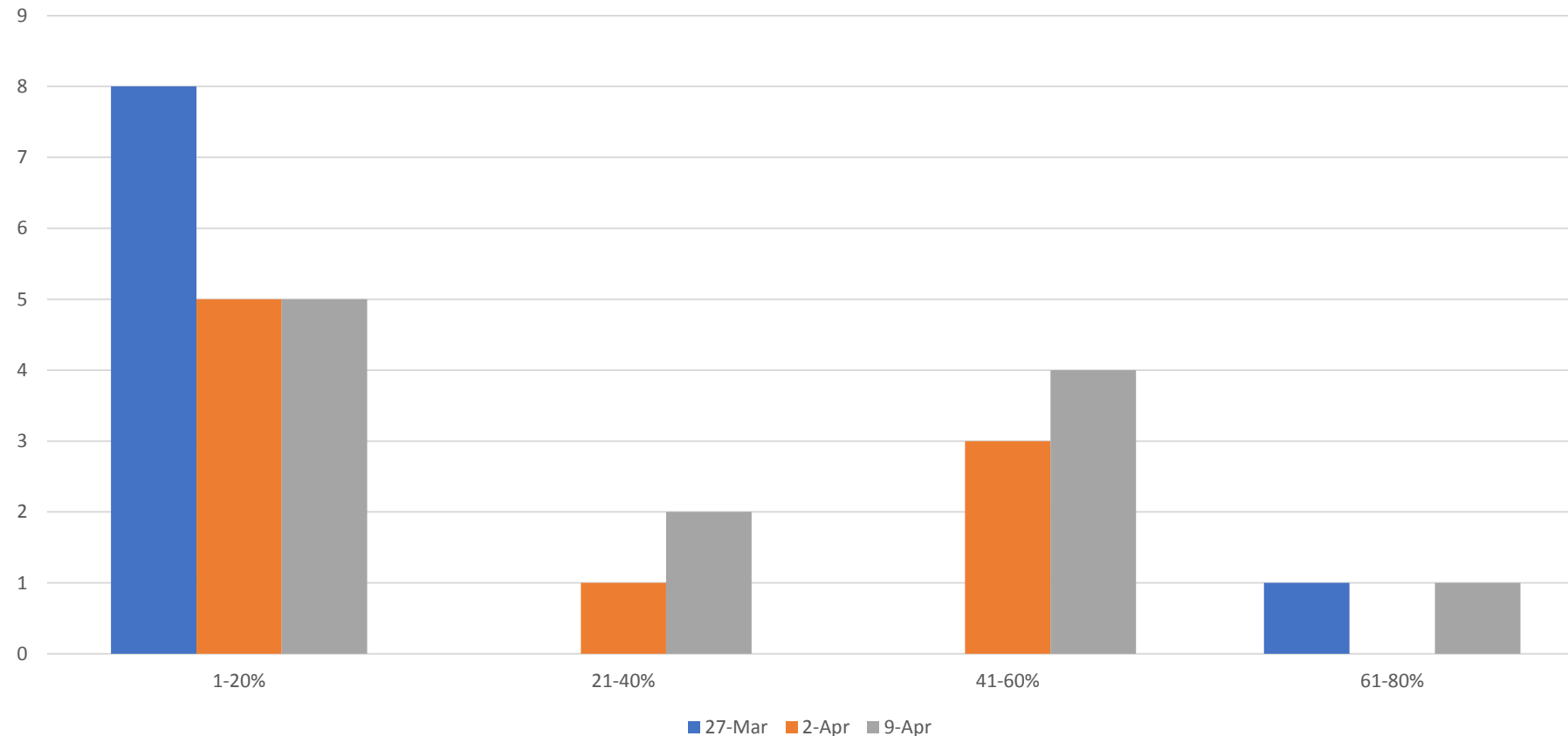
Compared to a "normal" business climate with 1 being the worst and 100 normal, rate the current business climate in your country.



## Plant closings continue to be on the increase.

All regions indicate they are seeing disruptions in manufacturing. Higher percentages of closings occurring from the previous week.

What percent of manufacturing facilities are closed in your country as a result of Covid 19

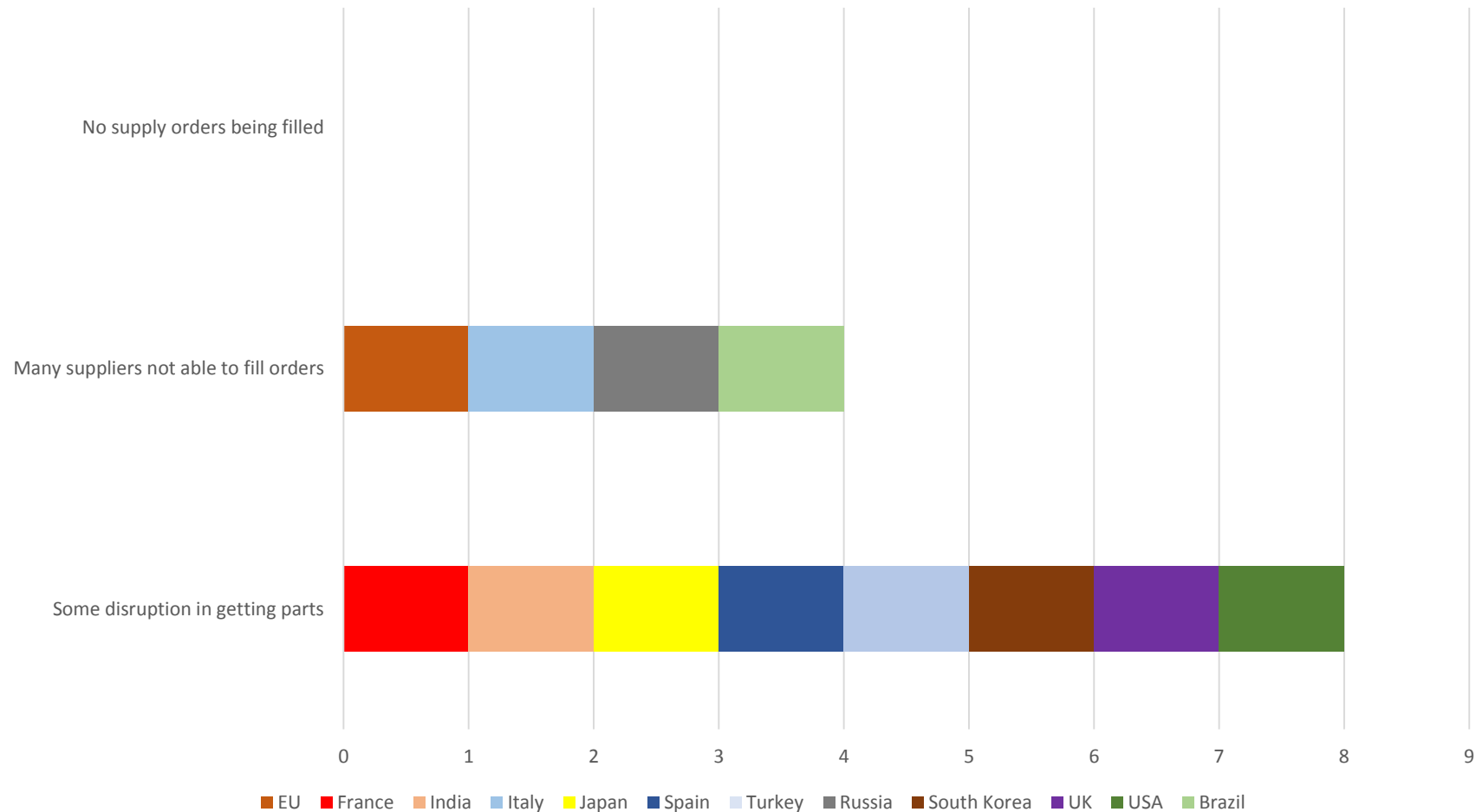




# Supply Chains are being disrupted

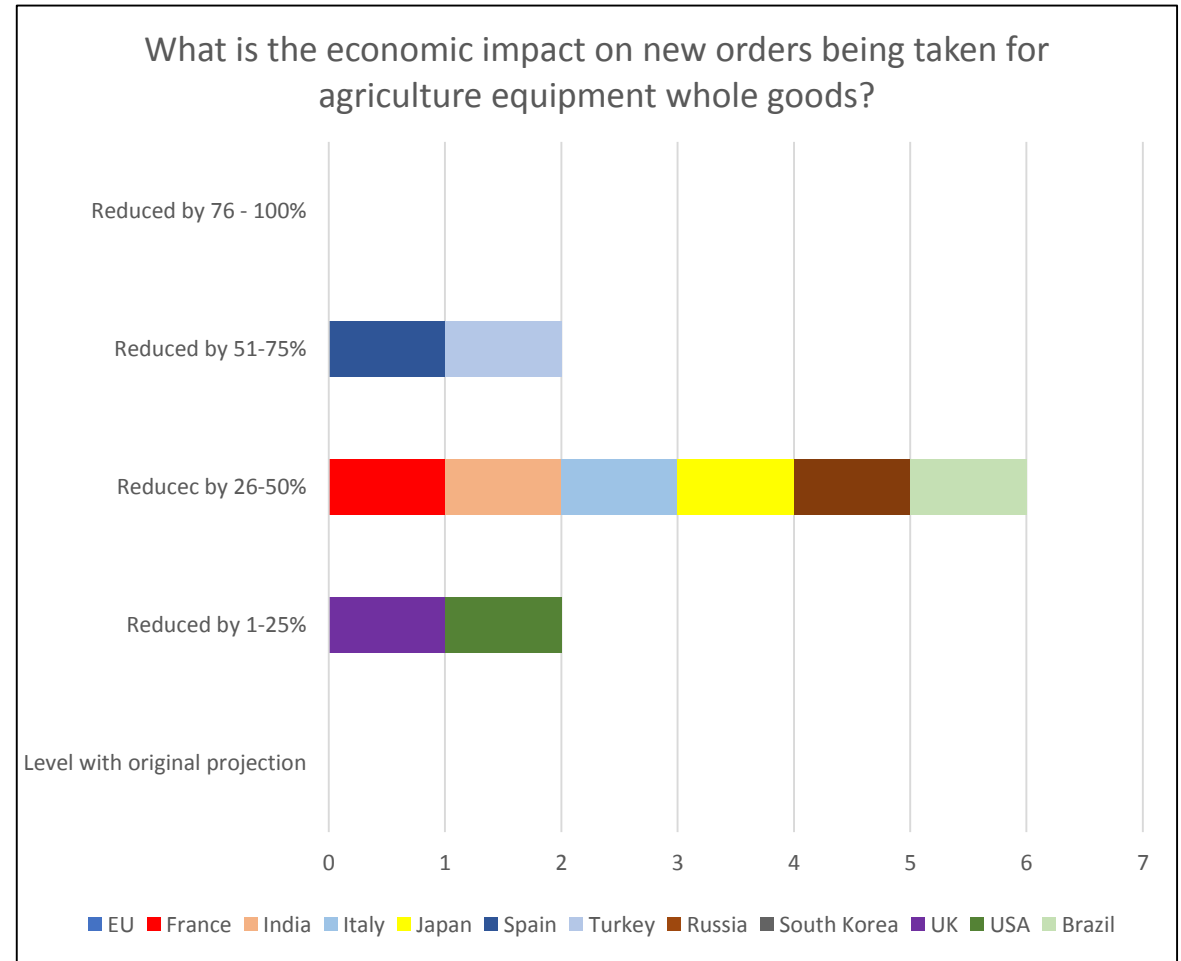
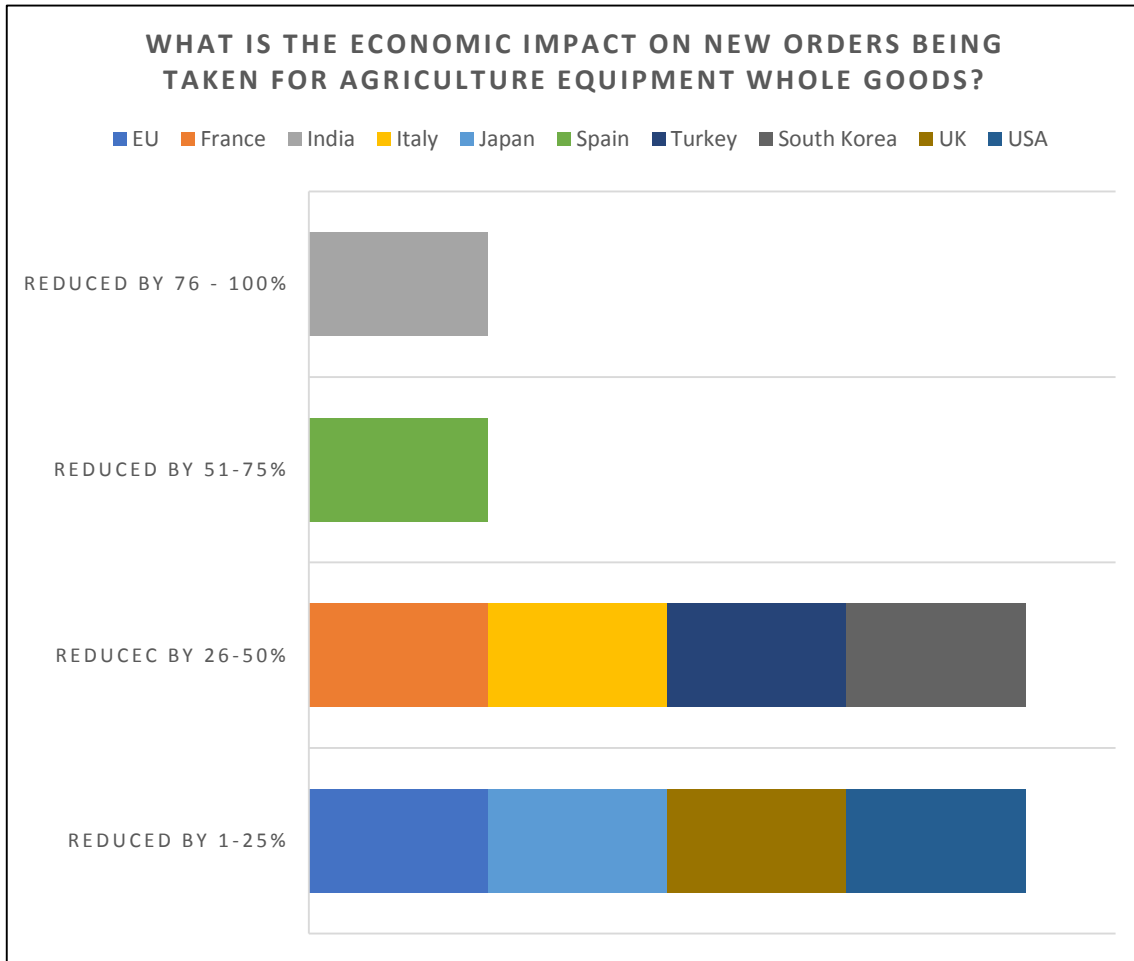
Every country is seeing disruptions in their supply chains which is impacting their business.

Which statement best describes the current situation relating to any disruption in the agricultural equipment manufacturing supply chains with parts and components?



# Economic impact on new orders

The week of April 10 has seen a further decline in new orders. Eight out of twelve countries are seeing reductions of new orders of over 25% with two countries reporting reductions between 51%-75%.



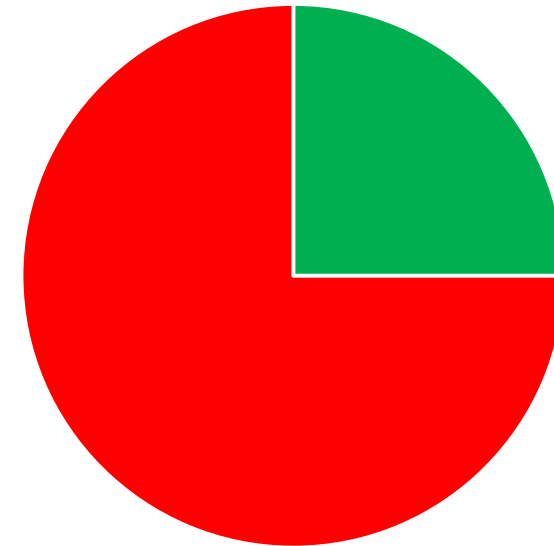
\*Countries not represented on graph did not respond to question

## Availability of trucks hampering delivering of parts and equipment

As of April 10, 75% of reporting countries indicate a shortage of trucks to transport parts and equipment.

	No	Yes
EU		X
France		X
India		X
Italy	X	
Japan	X	
Spain		X
Turkey		X
Russia	X	
South Korea		X
UK		X
USA		X
Brazil		X

Are your companies experiencing issues with the transportation of parts or equipment due to low availability of trucks?



■ No ■ Yes



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# Border closings prevalent and now creating transportation issues

Most countries facing border closings that are impacting transport of parts and equipment with France, Italy and Spain being the exception.

