



# Agrievolution Alliance Covid 19 Global Impact Survey April 3, 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, France, India, Italy, Japan, Russia, South Korea, Spain, Turkey, UK, USA

April 3, 2020

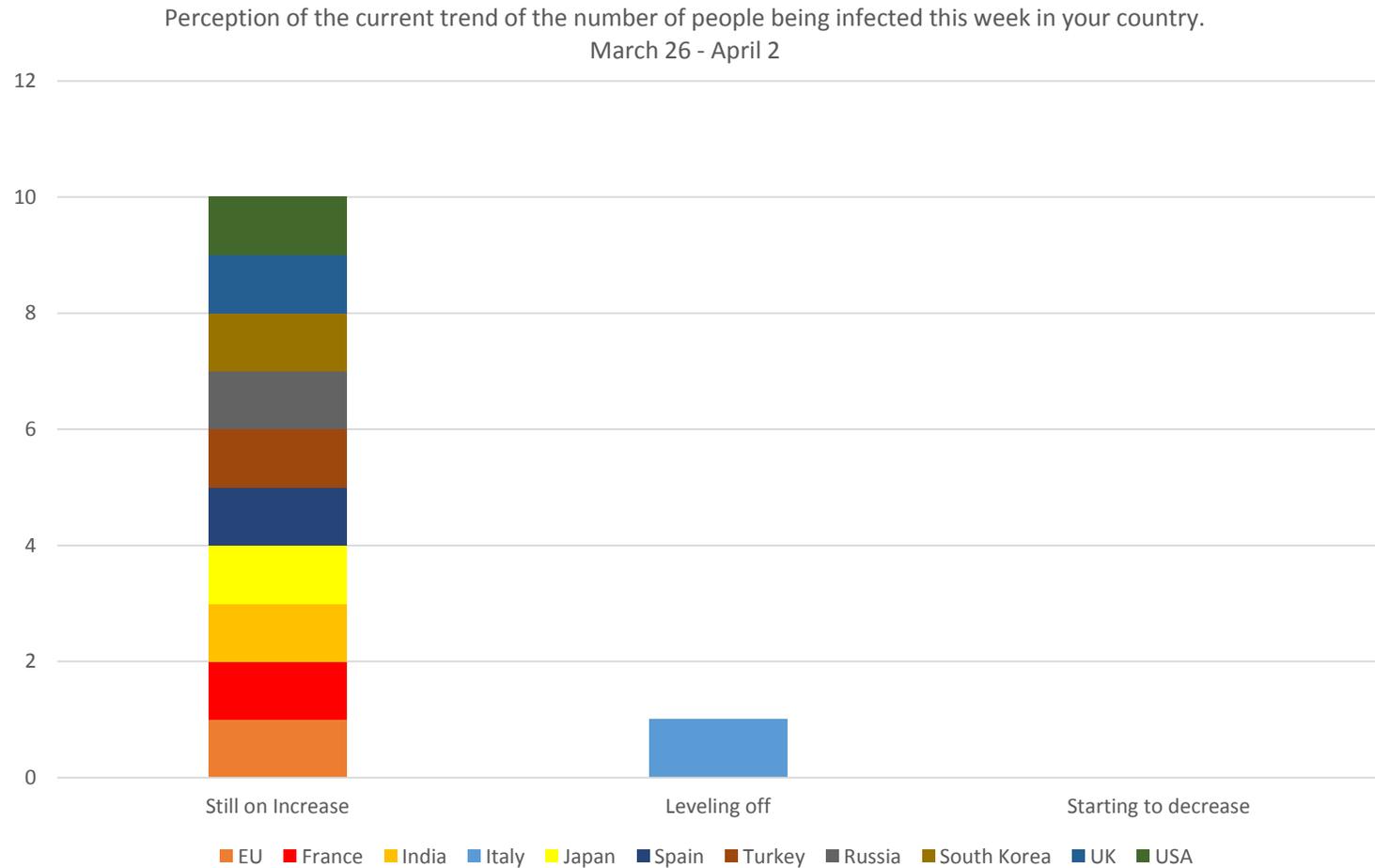


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- In all areas except Italy, Covid 19 cases are still on the increase. Italy indicates the virus is beginning to level off.
- Significant movement from the previous week with a much higher percent of plant closing occurring disrupting supply chains.
- 91% of reporting countries indicate a shortage of trucks to transport parts and equipment
- All countries report a decrease in new orders with India reporting a decrease of over 75%.
- Most countries facing boarder closings that are impacting transport of parts and equipment.

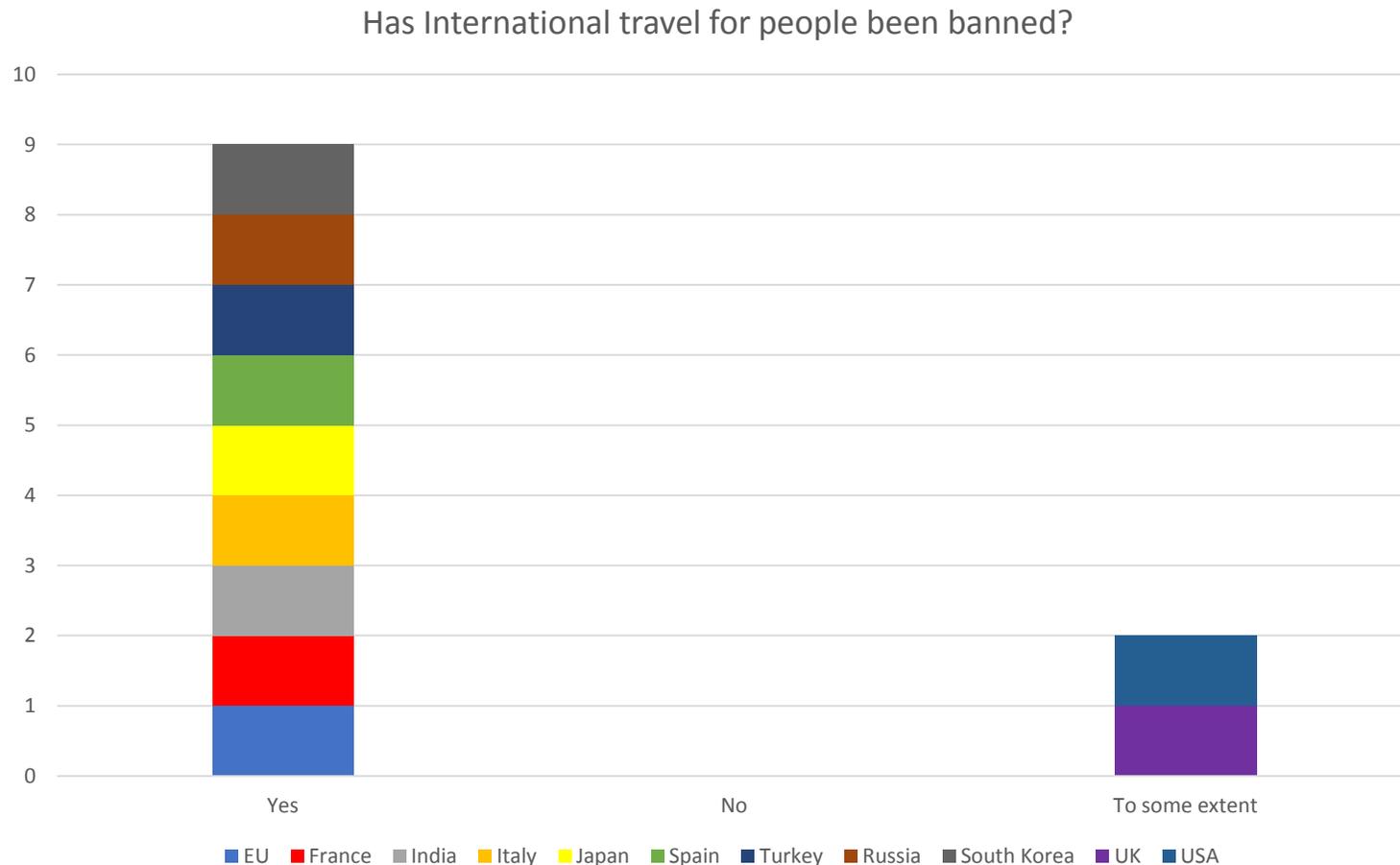
# Covid 19 still on increase

As of April 3, all areas except Italy, Covid 19 cases are still on the increase. Italy indicates the virus is beginning to level off.



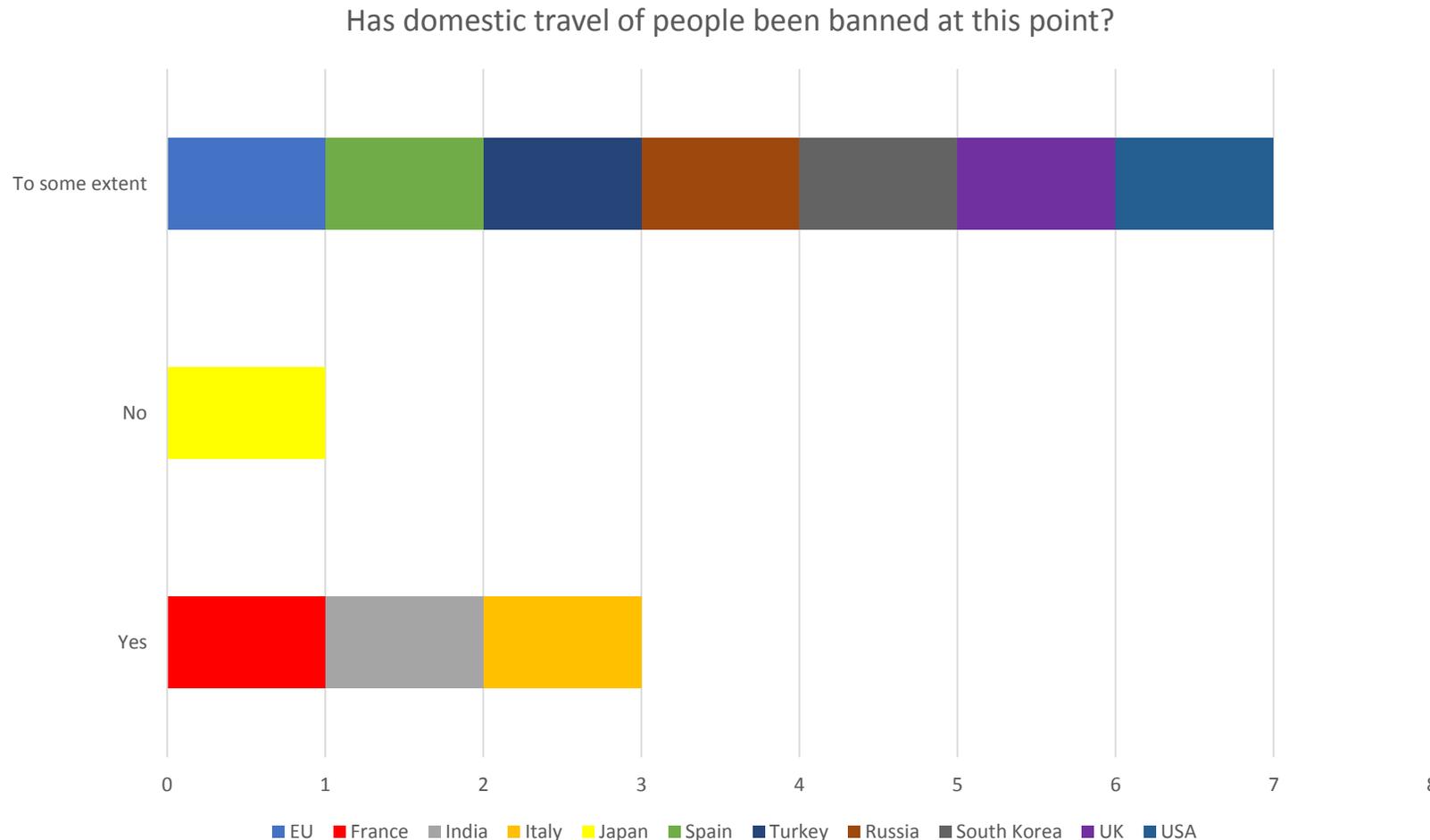
# Most countries are banning international travel

As of April 3, 2020, all countries are putting restrictions on international travel. Japan changed its position from last week where they had some international travel restrictions whereas now international travel is totally banned. The USA, and the UK have limited international travel to some extent.



# Domestic travel is being disrupted

As of April 2, only Japan does not currently have domestic travel restrictions. Russia placed some restrictions in place this week. All other regions continue to see restrictions on domestic travel.



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

Many countries are seeing some restrictions on movement of goods. France, Italy, Japan, Turkey, and the UK do not 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

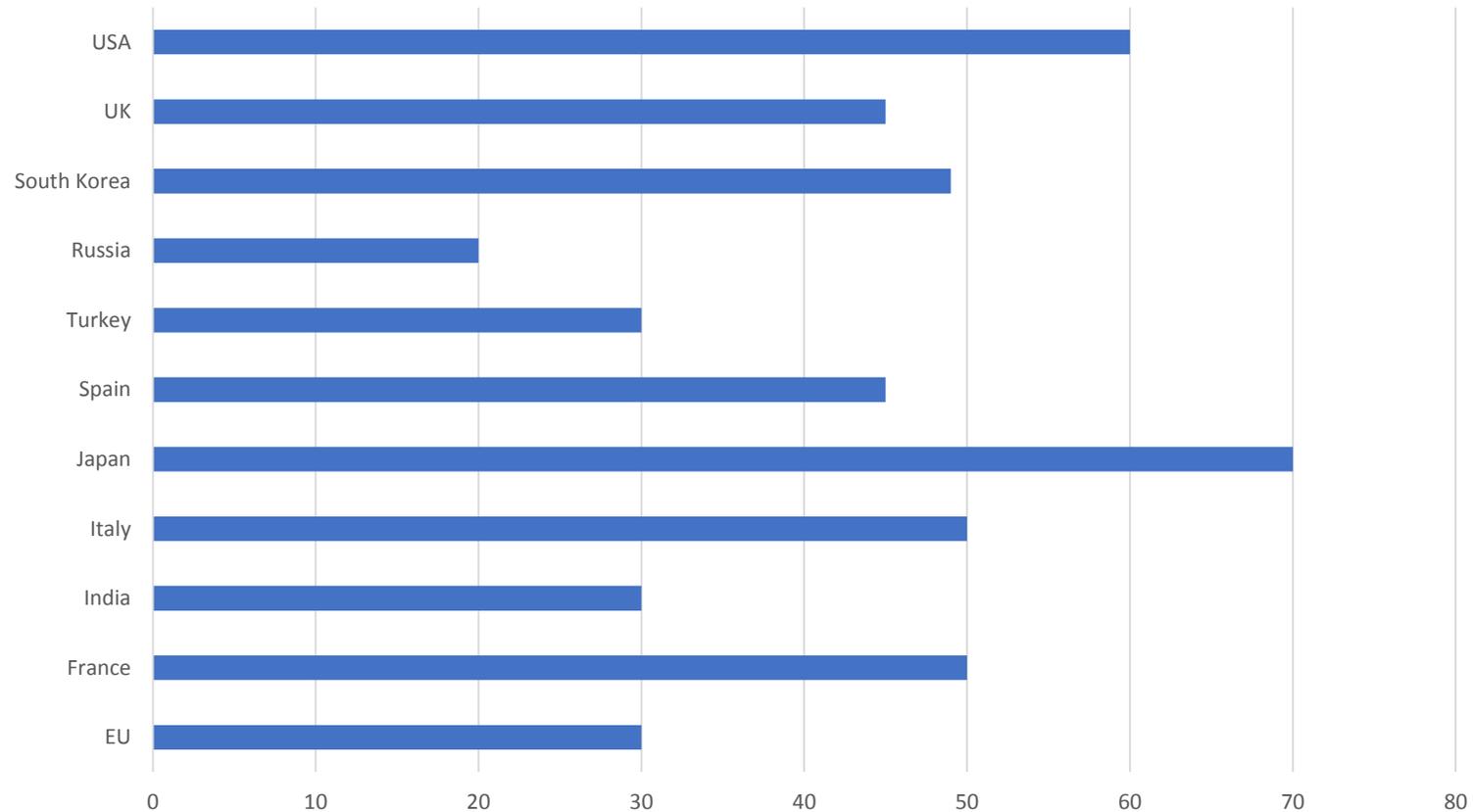


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# Business climate is Deteriorating.

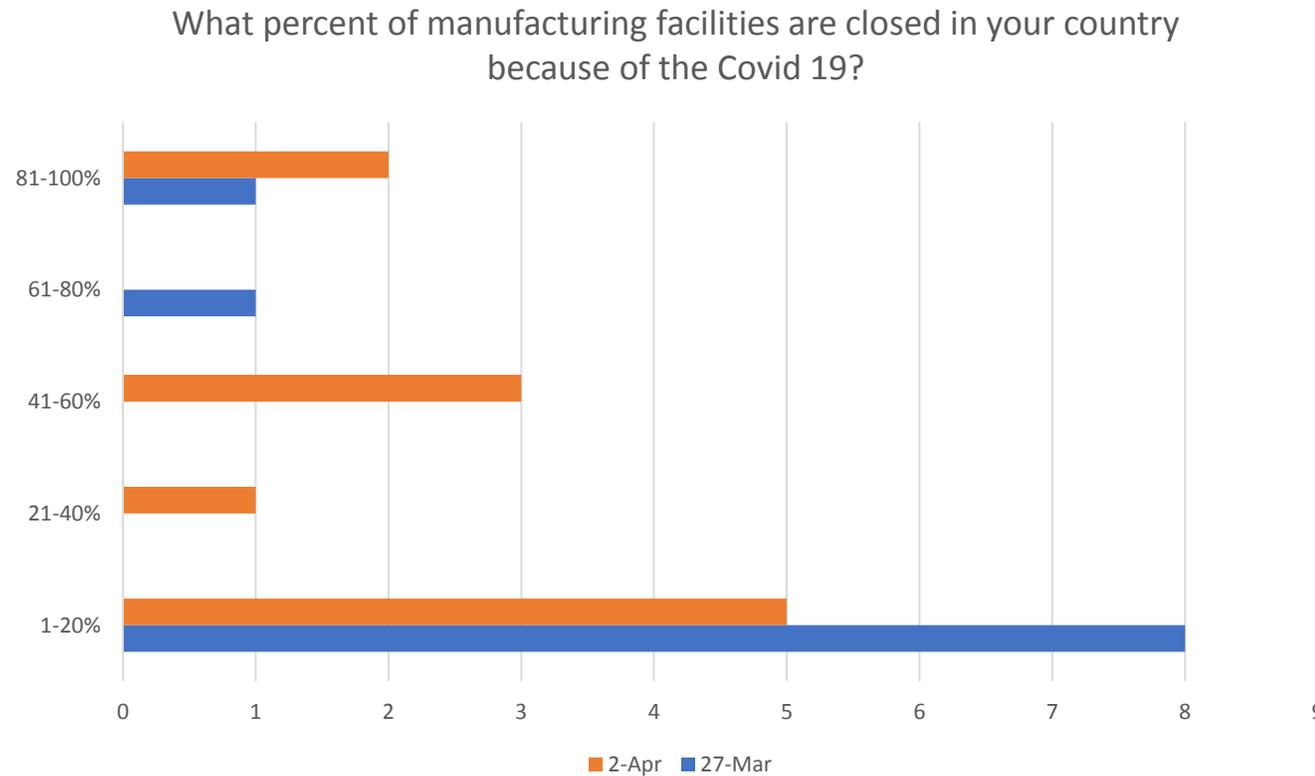
As of April 3, all regions report a deterioration in the business climate.

Compared to a “normal” business climate from 1 being the worst and 100 being the normal, rate the current business climate in your country.



## Most regions seeing an increase in plant closings over past week.

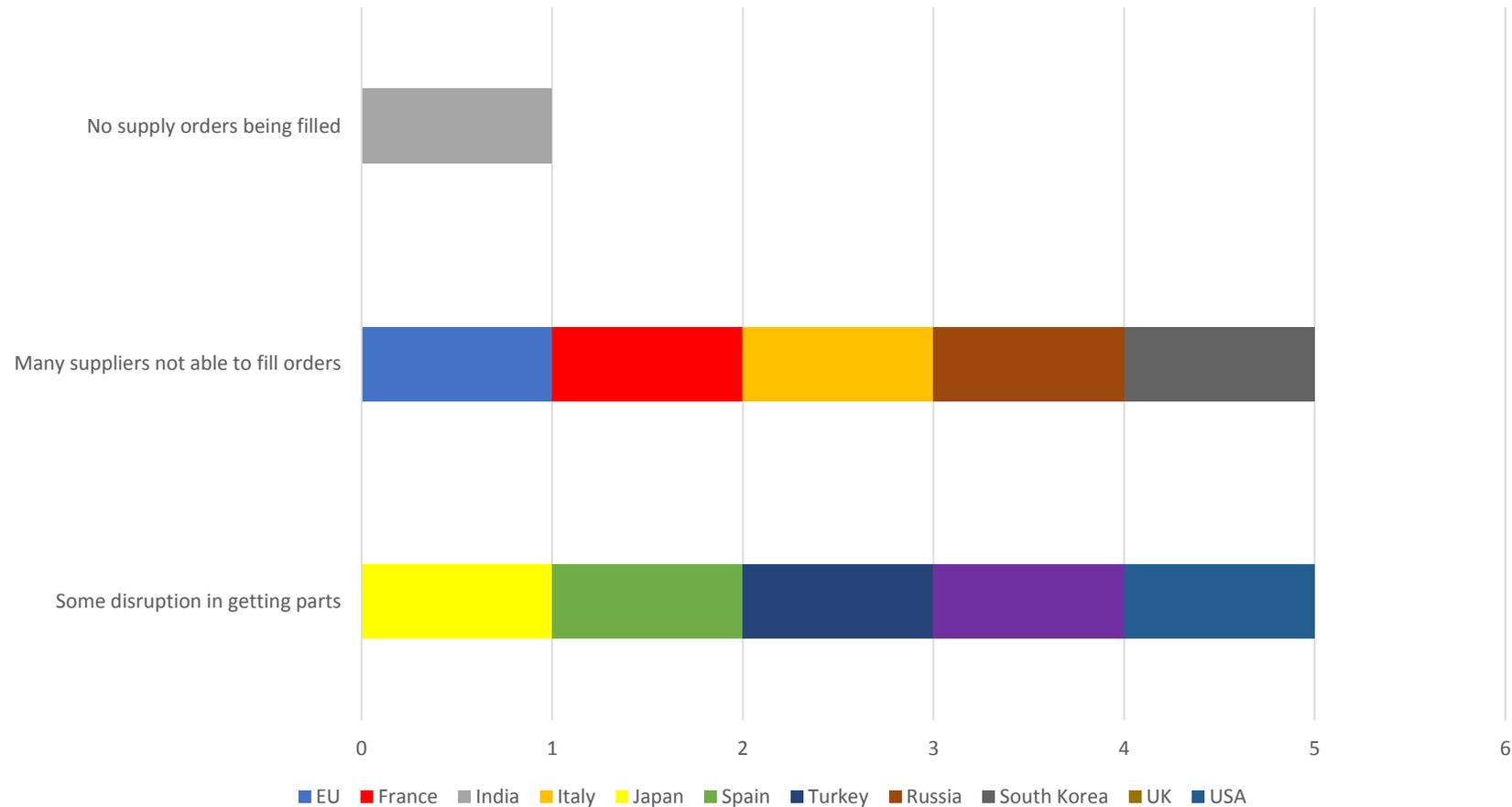
All regions indicate they are seeing disruptions in manufacturing. Significant movement from the previous week with a much higher percent of plant closing occurring.



# Supply Chains are being disrupted

As of April 3, one additional region indicating they are not able to fill orders because of disruptions in supply Chain. India indicates no orders being filled at this time.

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

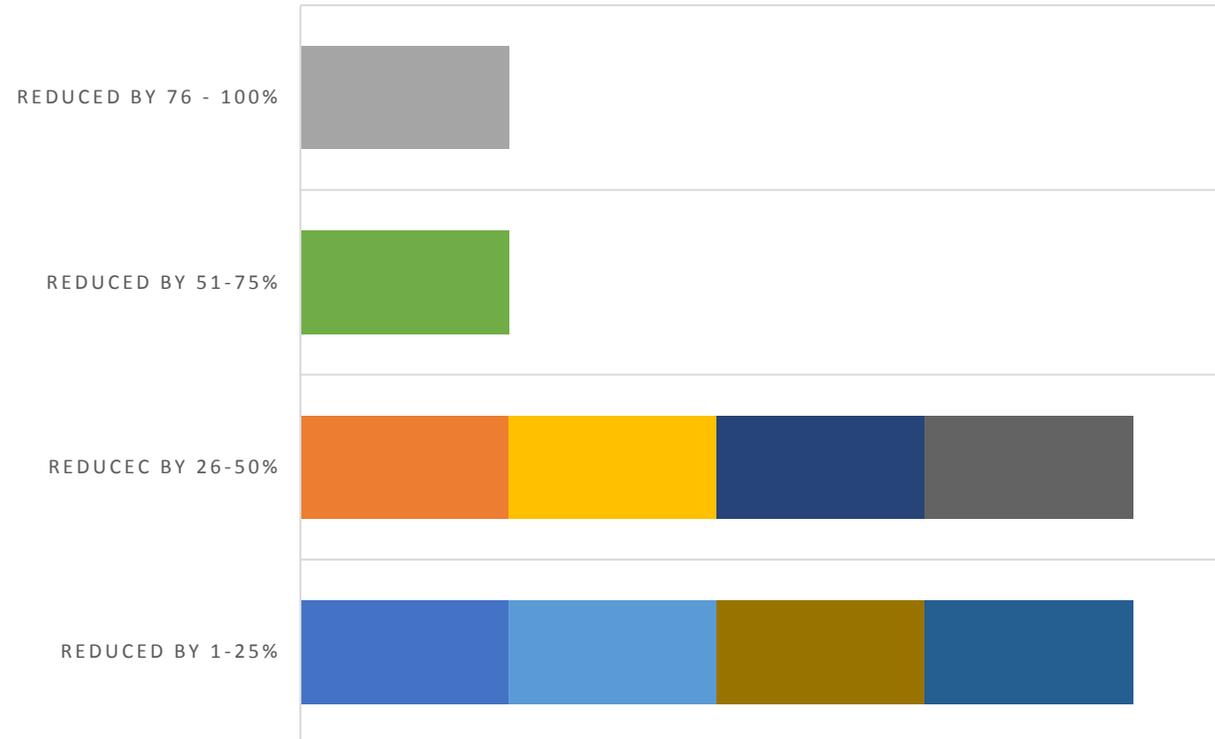


# Economic impact on new orders

Four regions are seeing a reduction of new orders of 1-25%, another four seeing a reduction of up to 50%. India reports a reduction of new orders greater than 75%.

WHAT IS THE ECONOMIC IMPACT ON NEW ORDERS BEING TAKEN FOR AGRICULTURE EQUIPMENT WHOLE GOODS?

■ EU ■ France ■ India ■ Italy ■ Japan ■ Spain ■ Turkey ■ South Korea ■ UK ■ USA

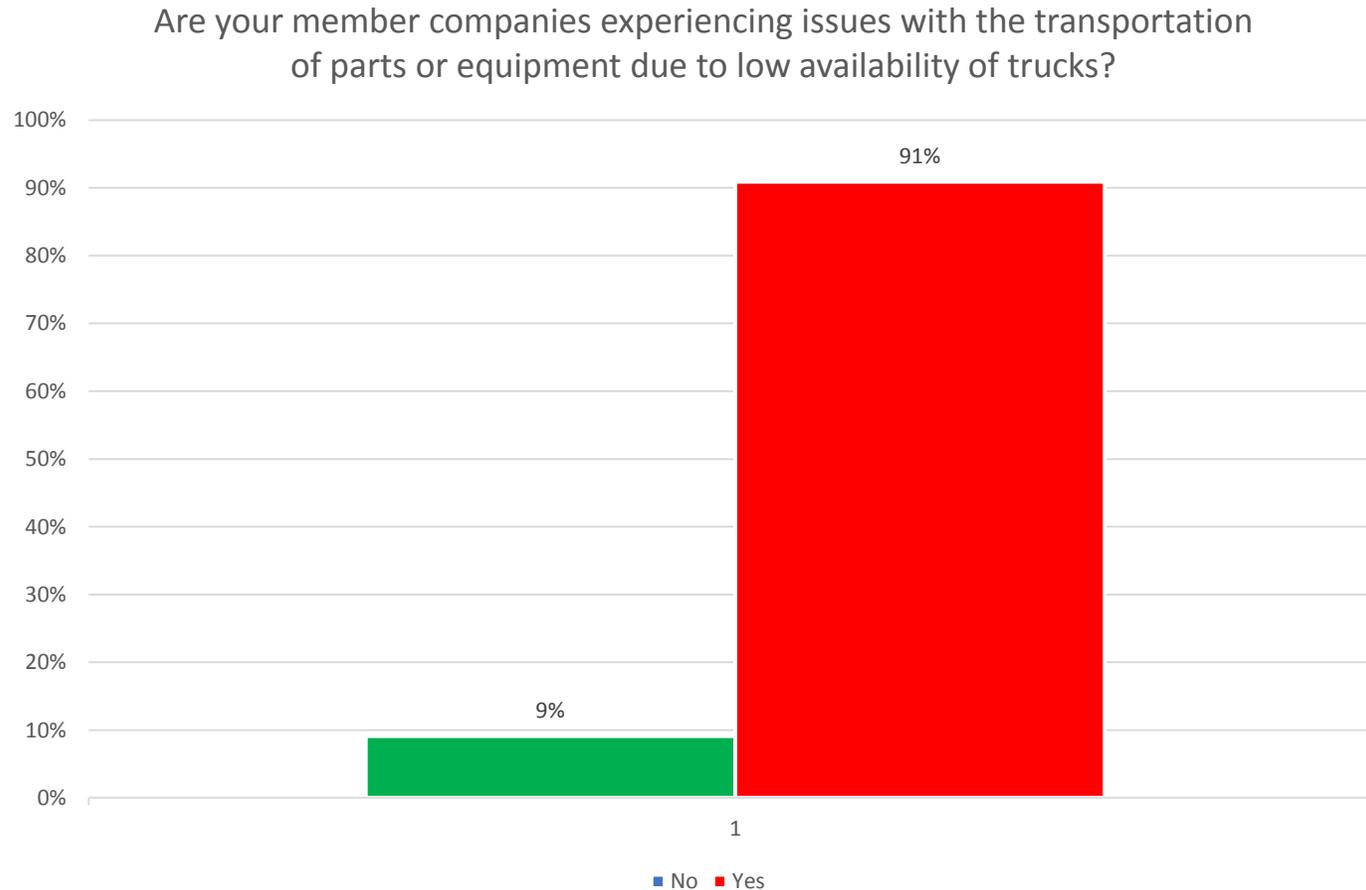


\*Countries not represented on graph did not respond to question



# Availability of trucks hampering delivering of parts and equipment

As of April 3, 91% of reporting countries indicate a shortage of trucks to transport parts and equipment.



# Boarder closings prevalent and now creating transportation issues

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

Are your member companies experiencing issues with the transportation of parts or equipment due to closing of borders?

