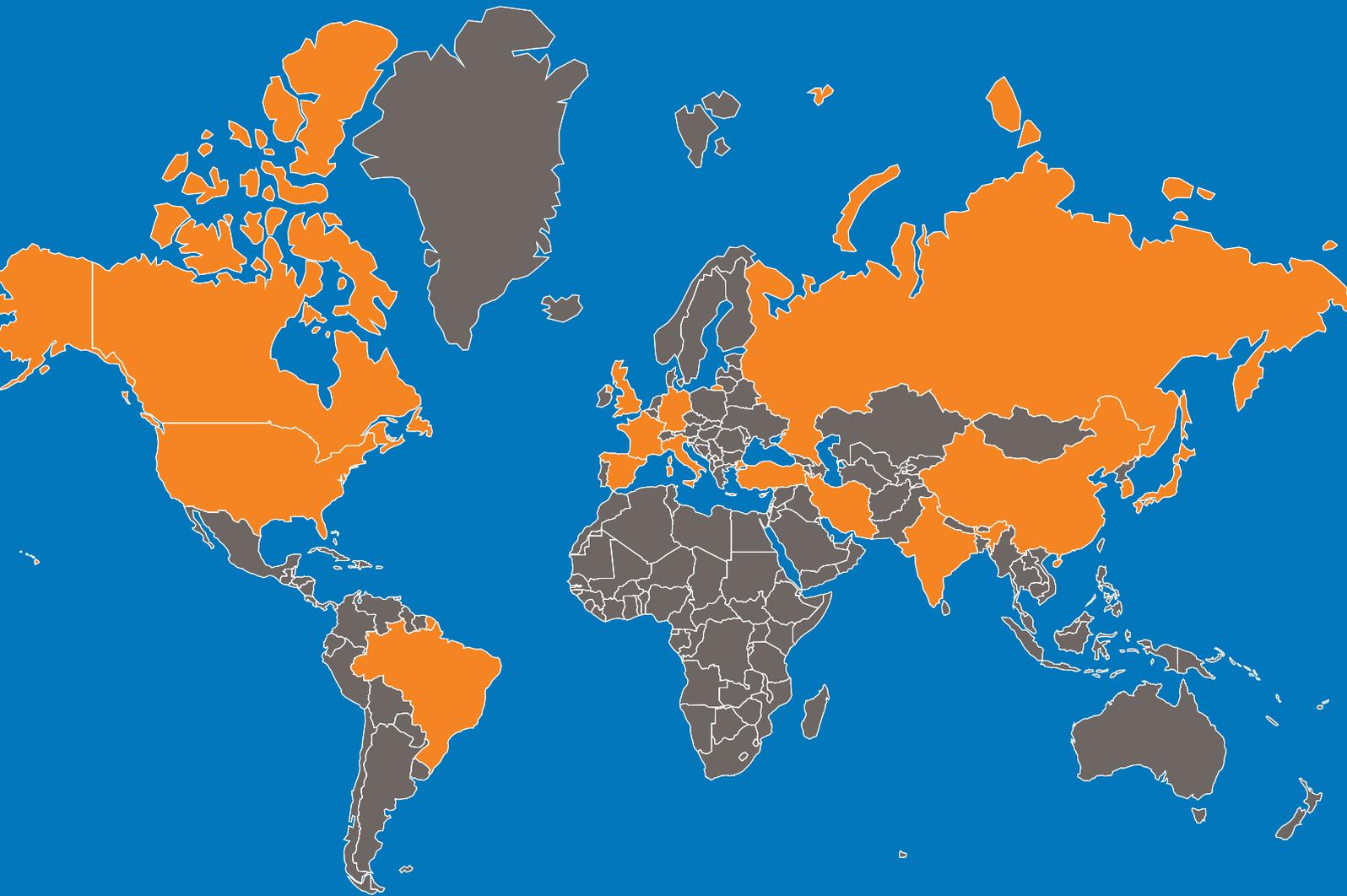


# COVID-19 Impact survey #6

Reporting period May 1 - May 15



# Agrievolution Alliance COVID-19 Global Impact Survey

- 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 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**  
Brazilian Association of Industrial Machinery and Equipment



**AEA**  
Agricultural Engineers Association



**AEM**  
Association of Equipment Manufacturers



**ANSEMAT**  
Association for Agricultural, Forestry and Landscaping Machinery



**ATMAK**  
Tractor, Combine, Machinery and Agricultural Equipment Manufacturers Association



**AXEMA**  
Association for Industrial Agricultural Equipment



**CAMDA**  
China Agricultural Machinery Distribution Association



**CEMA**  
European Agricultural Machinery Association



**FEDERUNACOMA**  
Italian Farm Machinery Manufacturers Association



**FICCI**  
Federation of Indian Chambers of Commerce and Industry



**JAMMA**  
Japan Agricultural Machinery Manufacturer's Association



**KAMICO**  
Korean Agricultural Machinery Industry Cooperative



**ROSSPETSMAH**  
Russian Association of Specialized Machinery and Equipment Manufacturers



**TARMAKBIR**  
Turkish Association of Agricultural Machinery & Equipment Manufacturers



**VDMA**  
German Agricultural Machinery Association

## OVERVIEW

May, 18th 2020

*The members of the Agrievolution Alliance have noted several significant changes taking place over the past two weeks relating to the impact of Covid-19 in their respective countries. Some countries are beginning to see glimmers of positive signs for the agricultural equipment manufacturing sector. England and Japan have now joined Italy and Spain in seeing the number of people infected decreasing while Russia's number of cases are leveling off. Brazil, India, Turkey, and the United States are still showing an increase in the number of cases reported.*

*All reporting countries continue to show substantial negative ratings of the current business situation. Brazil, the United Kingdom, and United States all report the business climate at a rating of less than 50 compared to normal rating of 100. India, South Korea, Spain, and Turkey all suggest a slight uptick in the business climate. The United Kingdom reports the largest drop over the last two weeks falling from 50 to now a 25 rating in the business climate.*

*Spain and Russia now report that all manufacturing facilities are now open which is a positive change over the last two weeks. Brazil and Japan continue to see significant challenges with between 41%-60% of the manufacturing facilities now closed. Italy has seen positive trends over the past 9 weeks going from 81%-100% facilities closed to only 1%-20% now closed.*

*New orders of whole goods are increasingly seeing declines around the world. All reporting countries report declines with Brazil and Japan showing the biggest decline in orders being down between 51-75%. India, Italy, Spain, Turkey, and the United States all see declines in the 26-50% range with South Korea and the United Kingdom both reporting decreases of 1-25%.*

*The next two weeks will be telling as more countries continue to loosen restrictions in hopes of getting more agricultural manufacturing facilities open again. Numbers of cases relating to the spread of the Covid virus will determine the sustainability of this approach.*

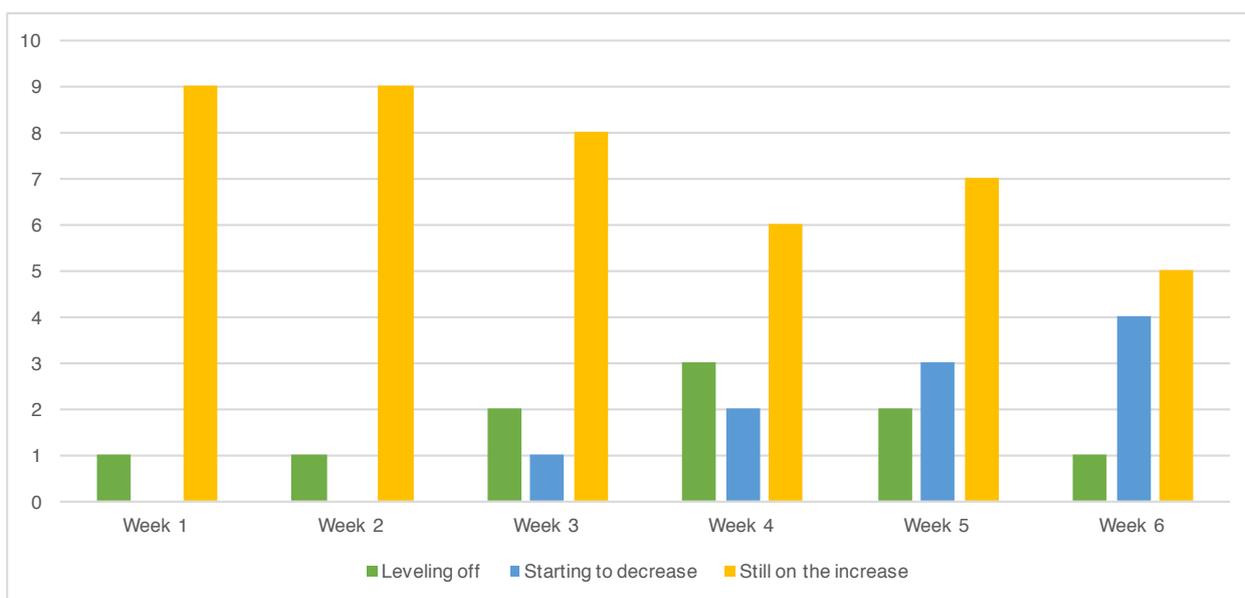
**Charlie O'Brien**

**Agrievolution Secretary General**

## Q1

## What is your personal perception of the current trend for the number of people being infected this week in your country?

Starting to see glimmers of positive signs in in some countries over the last two weeks. England and Japan have now joined Italy and Spain in seeing the number of people infected decreasing while Russia's number of cases are leveling off. Brazil, India, Turkey, and the United States are still showing an increase in the number of cases reported.



Country	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
Brazil			SOI	SOI	SOI	SOI
China					LO	
France	SOI	SOI	SOI	LO	STD	
Germany	SOI					
India		SOI	SOI	SOI	SOI	SOI
Italy	LO	LO	STD	STD	STD	STD
Japan	SOI	SOI	SOI	SOI	SOI	STD
Russia	SOI	SOI	SOI	SOI	SOI	LO
South Korea	SOI	SOI	LO	LO	LO	SOI
Spain	SOI	SOI	LO	STD	STD	STD
Turkey	SOI	SOI	SOI	SOI	SOI	SOI
United Kingdom	SOI	SOI	SOI	LO	SOI	STD
USA	SOI	SOI	SOI	SOI	SOI	SOI

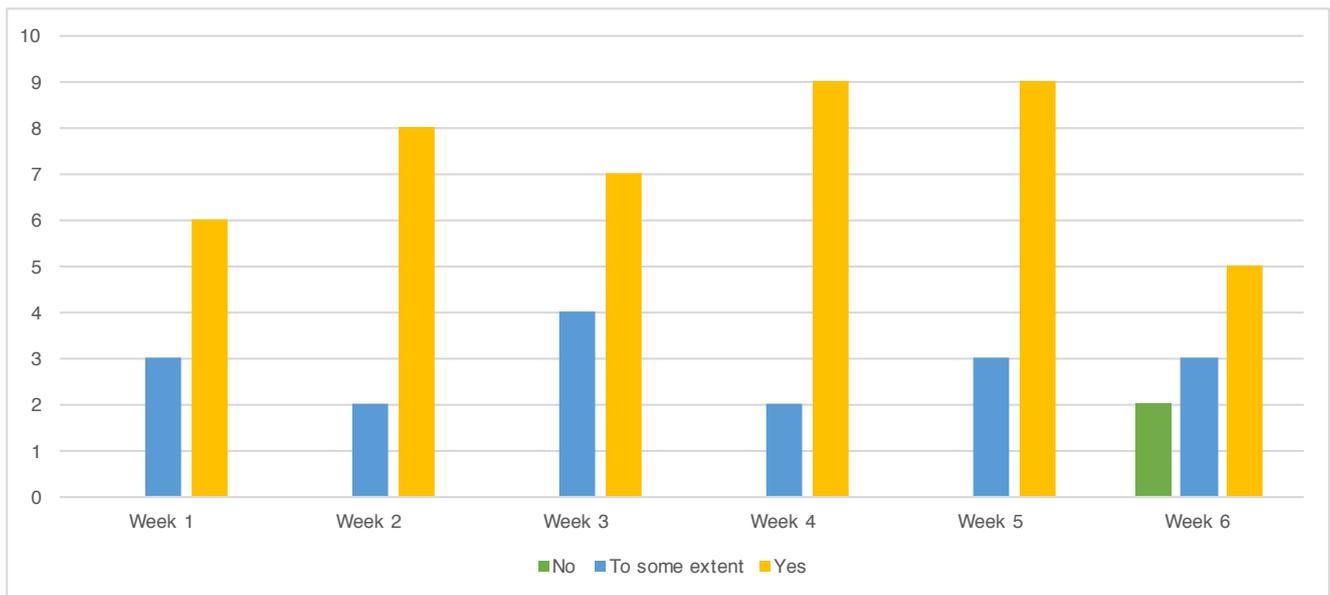
**SOI = Still on the increase**

**LO = Leveling off**

**STD = Starting to decrease**

## Q2 Has international travel for people been banned at this point?

Japan, Russia, and the United Kingdom have altered their restrictions over the past two weeks and are now currently allowing people to travel internationally. The remaining countries continue to have some restrictions in place with India, Italy, Spain, Turkey still banning all international travel.



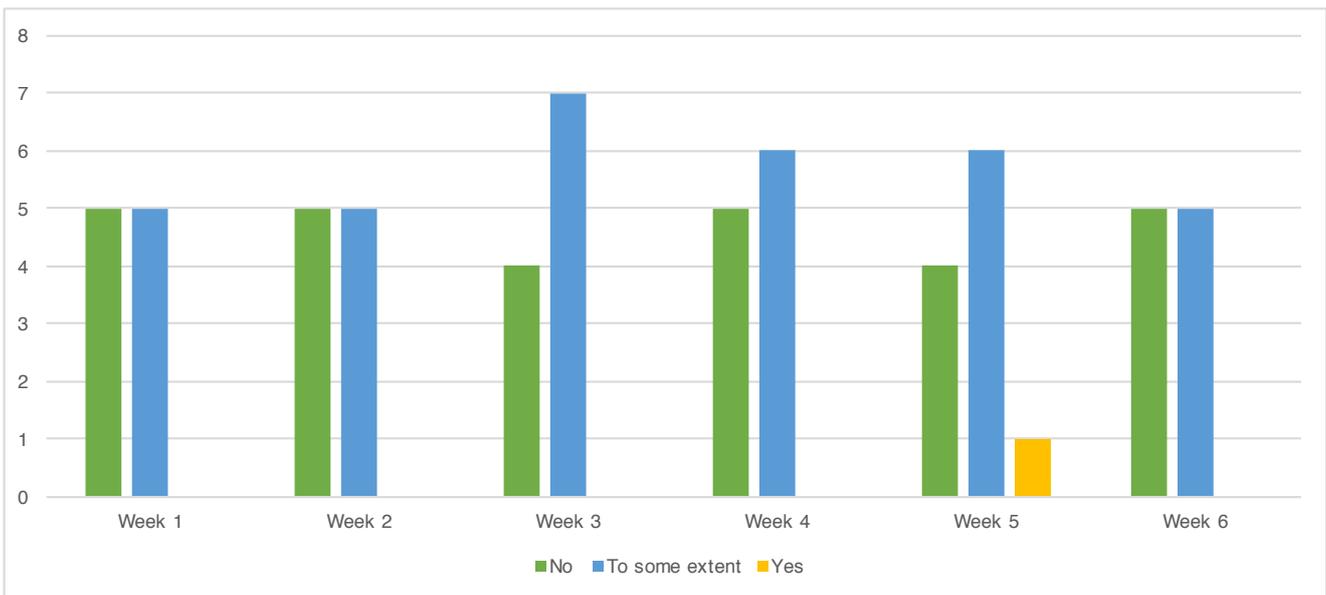
Country	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
<b>Brazil</b>			YES	YES	YES	TSE
<b>China</b>					TSE	
<b>France</b>	YES	YES	TSE	YES	YES	
<b>Germany</b>	YES					
<b>India</b>		YES	YES	YES	YES	YES
<b>Italy</b>	YES	YES	YES	YES	YES	YES
<b>Japan</b>	TSE	YES	YES	YES	YES	NO
<b>Russia</b>	YES	YES	YES	YES	YES	NO
<b>South Korea</b>		YES	TSE	YES	YES	TSE
<b>Spain</b>	YES	YES	YES	YES	YES	YES
<b>Turkey</b>	YES	YES	YES	YES	YES	YES
<b>United Kingdom</b>	TSE	TSE	TSE	TSE	TSE	NO
<b>USA</b>	TSE	TSE	TSE	TSE	TSE	TSE

**TSE = To some extent**

## Q3

## Have imports or exports of commodities and/or goods been banned in your country at this point?

There continues to be a flow of commodities and/or goods in most countries, but half of the reporting countries do indicate some restrictions have been put in place.



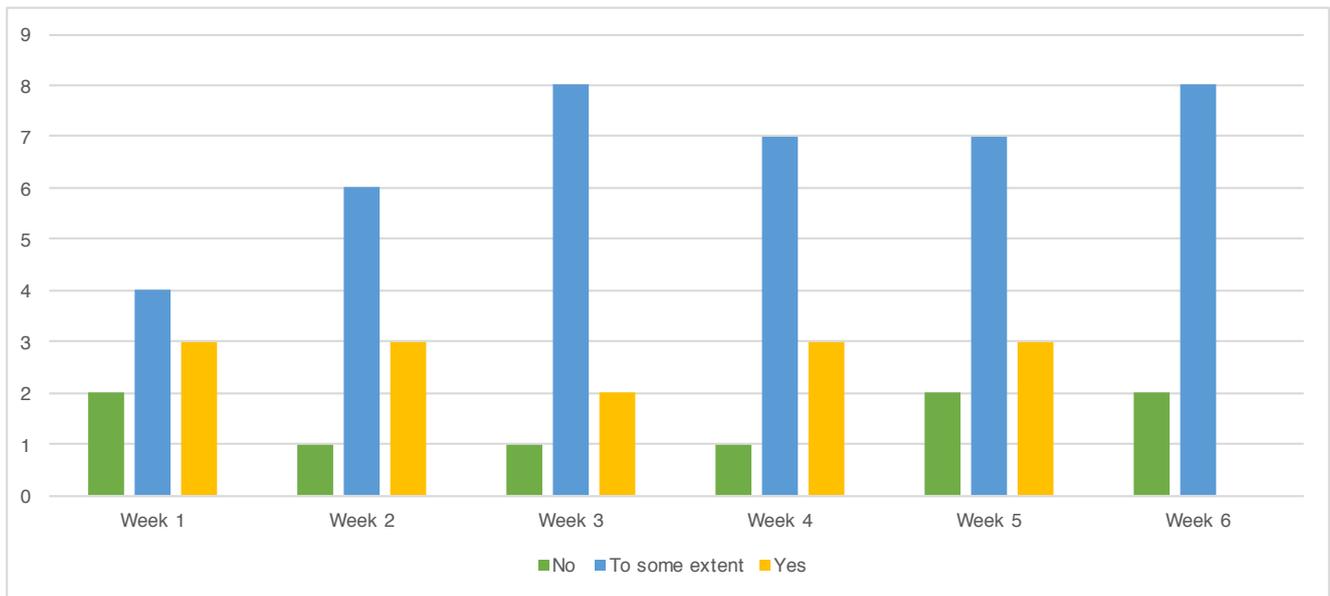
Country	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
<b>Brazil</b>			TSE	TSE	TSE	TSE
<b>China</b>					TSE	
<b>France</b>	NO	NO	NO	NO	YES	
<b>Germany</b>	NO					
<b>India</b>		TSE	TSE	TSE	TSE	TSE
<b>Italy</b>	TSE	NO	NO	NO	NO	NO
<b>Japan</b>	NO	NO	NO	NO		NO
<b>Russia</b>	TSE	TSE	TSE	TSE	NO	NO
<b>South Korea</b>	TSE	TSE	TSE	TSE	TSE	TSE
<b>Spain</b>	TSE	TSE	TSE	TSE	TSE	TSE
<b>Turkey</b>	NO	NO	NO	NO	NO	NO
<b>United Kingdom</b>	NO	NO	TSE	NO	NO	NO
<b>USA</b>	TSE	TSE	TSE	TSE	TSE	TSE

**TSE = To some extent**

# Q4

## Has domestic travel of people been banned at this point?

Only Japan and the United Kingdom do not currently have any restrictions in place for people traveling domestically. There has been some loosening of domestic travel restrictions over the past two weeks in India, and Italy while United Kingdom has moved from some restrictions to no restrictions for domestic travel. South Korea has now moved back to putting some restrictions in place over the last two weeks.



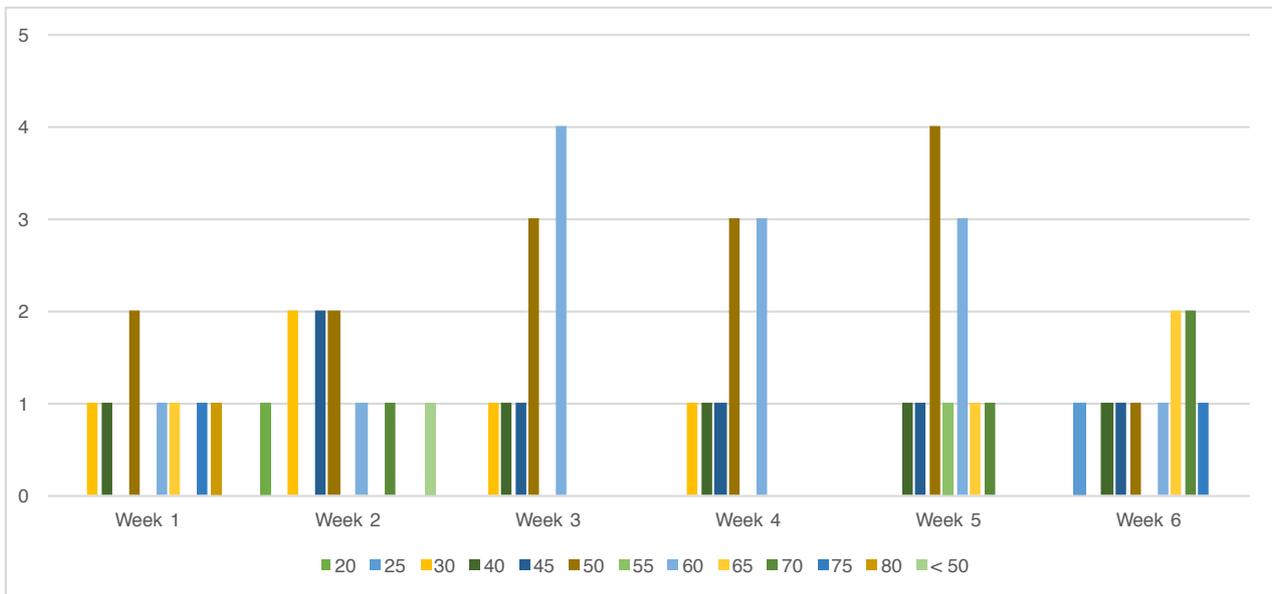
Country	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
<b>Brazil</b>			TSE	YES	TSE	TSE
<b>China</b>					TSE	
<b>France</b>	YES	YES	TSE	YES	YES	
<b>Germany</b>	YES					
<b>India</b>		YES	YES	YES	YES	TSE
<b>Italy</b>	YES	YES	YES	TSE	YES	TSE
<b>Japan</b>	NO	NO	NO	NO	NO	NO
<b>Russia</b>	NO	TSE	TSE	TSE	TSE	TSE
<b>South Korea</b>	TSE	TSE	TSE	TSE	NO	TSE
<b>Spain</b>	TSE	TSE	TSE	TSE	TSE	TSE
<b>Turkey</b>		TSE	TSE	TSE	TSE	TSE
<b>United Kingdom</b>	TSE	TSE	TSE	TSE	TSE	NO
<b>USA</b>	TSE	TSE	TSE	TSE	TSE	TSE

**TSE = To some extent**

## Q5

### Compared to a “normal” business climate from 1 being the worst and 100 being the normal business climate how would you rate the current business climate in your country?

All reporting countries continue to show substantial negative ratings of the current business situation. Brazil, the United Kingdom, and United States all report the business climate at a rating of less than 50 compared to normal rating of 100. India, South Korea, Spain, and Turkey all suggest a slight uptick in the business climate. The United Kingdom reports the largest drop over the last two weeks falling from 50 to now a 25 rating in the business climate.

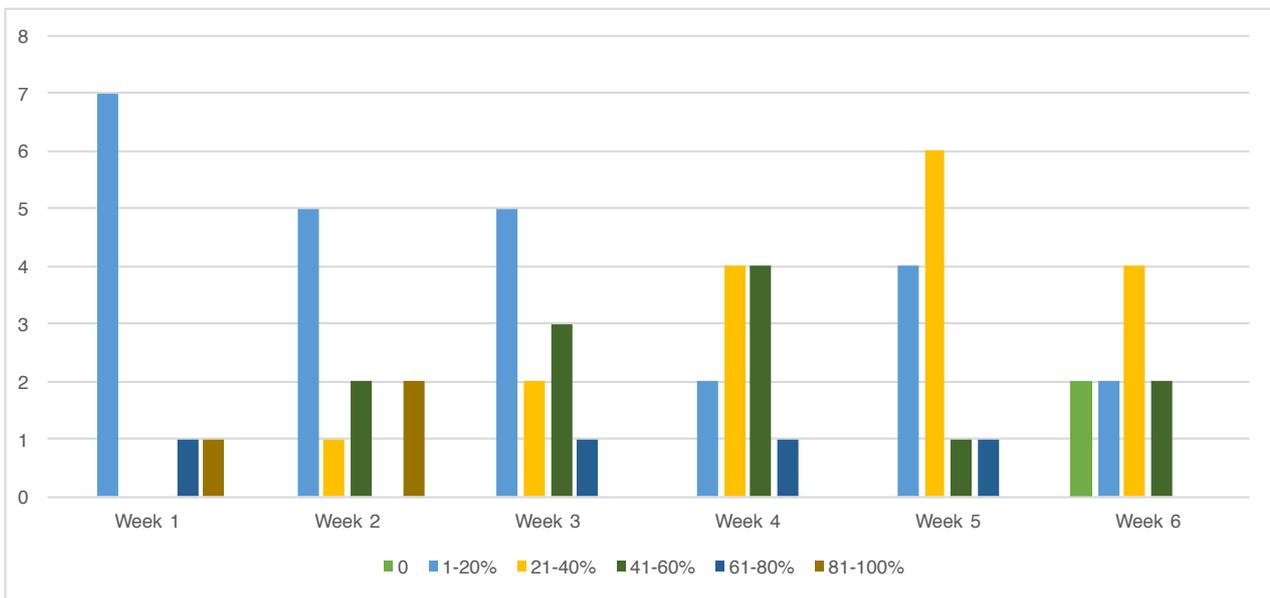


Country	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
<b>Brazil</b>			40-50	30	40	40
<b>China</b>					50	
<b>France</b>	75	50	60	50	65	
<b>Germany</b>	50					
<b>India</b>		30	30	50	50	75
<b>Italy</b>	1	50	50		60	60
<b>Japan</b>	80	70	60	50	50	50
<b>Russia</b>	30-40	20	60	60	70	70
<b>South Korea</b>	40	< 50	60	60	60	70
<b>Spain</b>	50	45	50	40	55	65
<b>Turkey</b>	30	30	45	60	60	65
<b>United Kingdom</b>	65	45	40		50	25
<b>USA</b>	60	60	50	45	45	45

## Q6

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

Spain and Russia now report that all manufacturing facilities are now open which is a positive change over the last two weeks. Brazil and Japan continue to see significant challenges with between 41%-60% of the manufacturing facilities now closed. Italy has seen positive trends over the past 9 weeks going from 81%-100% facilities closed to only 1%-20% now closed.



Country	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
<b>Brazil</b>	(vacío)	(vacío)	41-60%	41-60%	21-40%	41-60%
<b>China</b>					1-20%	
<b>France</b>	61-80%	41-60%	41-60%	21-40%	21-40%	
<b>Germany</b>	1-20%					
<b>India</b>		81-100%	61-80%	61-80%	61-80%	21-40%
<b>Italy</b>	81-100%	41-60%	41-60%	41-60%	1-20%	1-20%
<b>Japan</b>	1-20%	1-20%	21-40%	41-60%	41-60%	41-60%
<b>Russia</b>		81-100%	21-40%	21-40%	21-40%	0%
<b>South Korea</b>	1-20%	1-20%	1-20%	21-40%	21-40%	21-40%
<b>Spain</b>	1-20%	1-20%	1-20%	1-20%	1-20%	0%
<b>Turkey</b>	1-20%	1-20%	1-20%	1-20%	1-20%	1-20%
<b>United Kingdom</b>	1-20%	21-40%	1-20%	41-60%	21-40%	21-40%
<b>USA</b>	1-20%	1-20%	1-20%	21-40%	21-40%	21-40%

## Q7

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

All reporting countries except the United Kingdom suggest they are still seeing some disruption in the agricultural manufacturing supply chain for parts and components. The United Kingdom is now reporting no disruptions in the supply chain.



Country	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
<b>Brazil</b>			NA	NA	NA	NA
<b>China</b>					SD	
<b>France</b>	NA	NA	SD	SD		
<b>Germany</b>	NA					
<b>India</b>		SH	SD	SD	SD	SD
<b>Italy</b>	NA	NA	NA	NA	SD	SD
<b>Japan</b>	SD	SD	SD	SD	NA	NA
<b>Russia</b>	SD	NA	SD	SD	SD	SD
<b>South Korea</b>	SH	SD	SD	SD	SD	SD
<b>Spain</b>	SD	SD	SD	SD	SD	SD
<b>Turkey</b>	SD	SD	SD	SD	SD	SD
<b>United Kingdom</b>	SD	SD	SD	ND	SD	ND
<b>USA</b>	SD	SD	SD	SD	SD	SD

**ND = No disruption**

**SD = Companies are seeing some disruption in getting parts and components**

**NA = Companies are seeing many suppliers not able to fill orders**

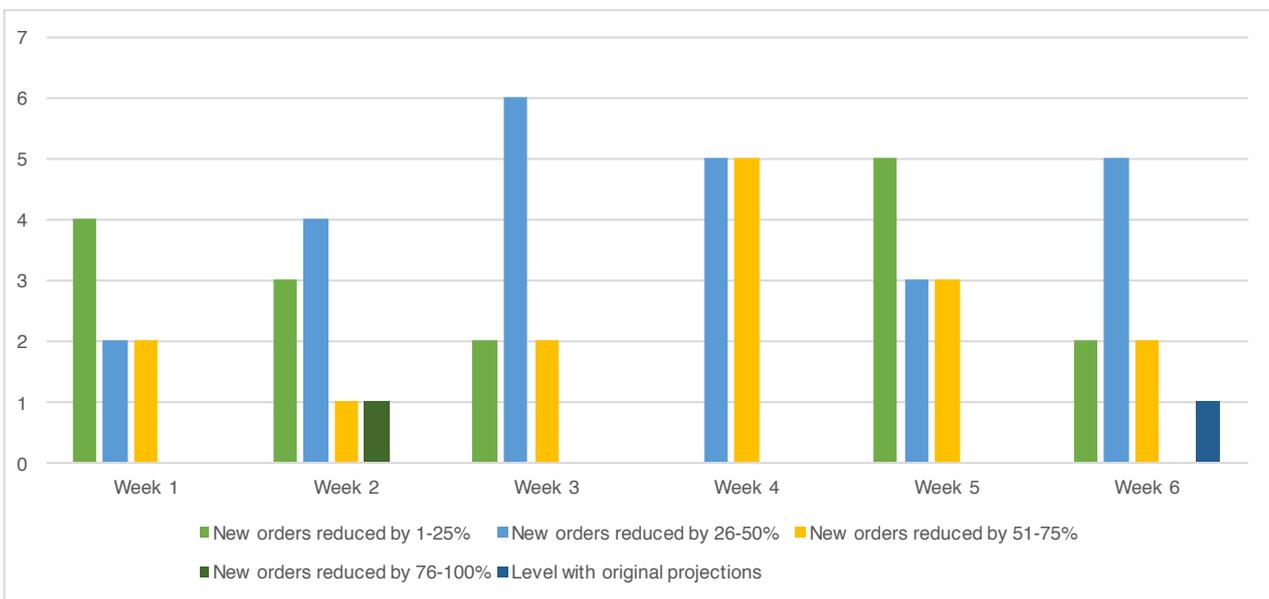
**SH = There are no supply orders being filled at this time as factories are shut down**

**down**

## Q8

# What is the economic impact on new orders being taken for agriculture equipment whole goods?

New orders of whole goods are increasingly seeing declines around the world. All reporting countries report declines with Brazil and Japan showing the biggest decline in orders being down between 51-75%. India, Italy, Spain, Turkey, and the United States all see declines in the 26-50% range with South Korea and the United Kingdom both reporting decreases of 1-25%.



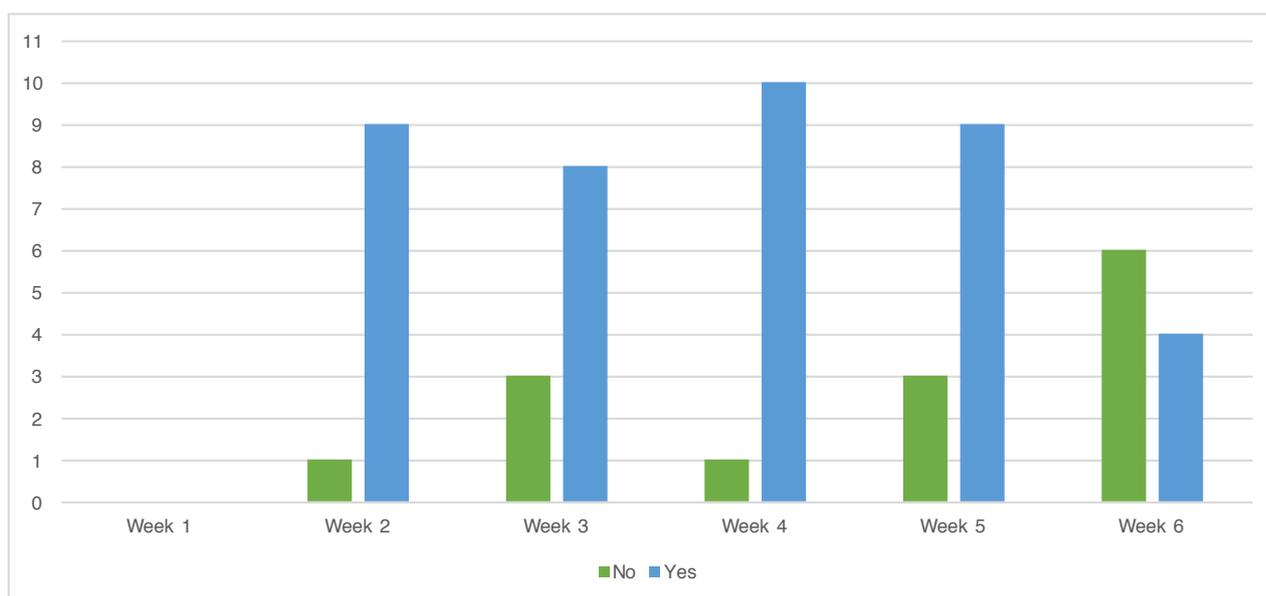
Country	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
Brazil	(vacío)	(vacío)	↓ [26-50%]	↓ [26-50%]	↓ [51-75%]	↓ [51-75%]
China					↓ [1-25%]	
France	↓ [26-50%]	↓ [26-50%]	↓ [26-50%]	↓ [51-75%]		
Germany	↓ [1-25%]					
India		↓ [76-100%]	↓ [26-50%]	↓ [51-75%]	↓ [51-75%]	↓ [26-50%]
Italy	↓ [26-50%]	↓ [26-50%]	↓ [26-50%]	↓ [26-50%]	↓ [1-25%]	↓ [26-50%]
Japan		↓ [1-25%]	↓ [26-50%]	↓ [51-75%]	↓ [51-75%]	↓ [51-75%]
Russia					↓ [1-25%]	L
South Korea	↓ [51-75%]	↓ [26-50%]	↓ [26-50%]	↓ [26-50%]	↓ [1-25%]	↓ [1-25%]
Spain	↓ [51-75%]	↓ [51-75%]	↓ [51-75%]	↓ [51-75%]	↓ [26-50%]	↓ [26-50%]
Turkey	↓ [1-25%]	↓ [26-50%]	↓ [51-75%]	↓ [51-75%]	↓ [26-50%]	↓ [26-50%]
United Kingdom	↓ [1-25%]	↓ [1-25%]	↓ [1-25%]	↓ [26-50%]	↓ [1-25%]	↓ [1-25%]
USA	↓ [1-25%]	↓ [1-25%]	↓ [1-25%]	↓ [26-50%]	↓ [26-50%]	↓ [26-50%]

L = Level with original projections prior to the onset of Covid 19 in our country

## Q9

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

A significant change over the past two weeks has occurred with fewer countries seeing less issues with transportation of parts or equipment because of availability of trucks and/or ships. South Korea, Spain, Turkey, and the United Kingdom now have seen a change over the last two weeks reporting no issues with transportation. Brazil, India, Japan, and the United States continue to experience some issues with transportation.

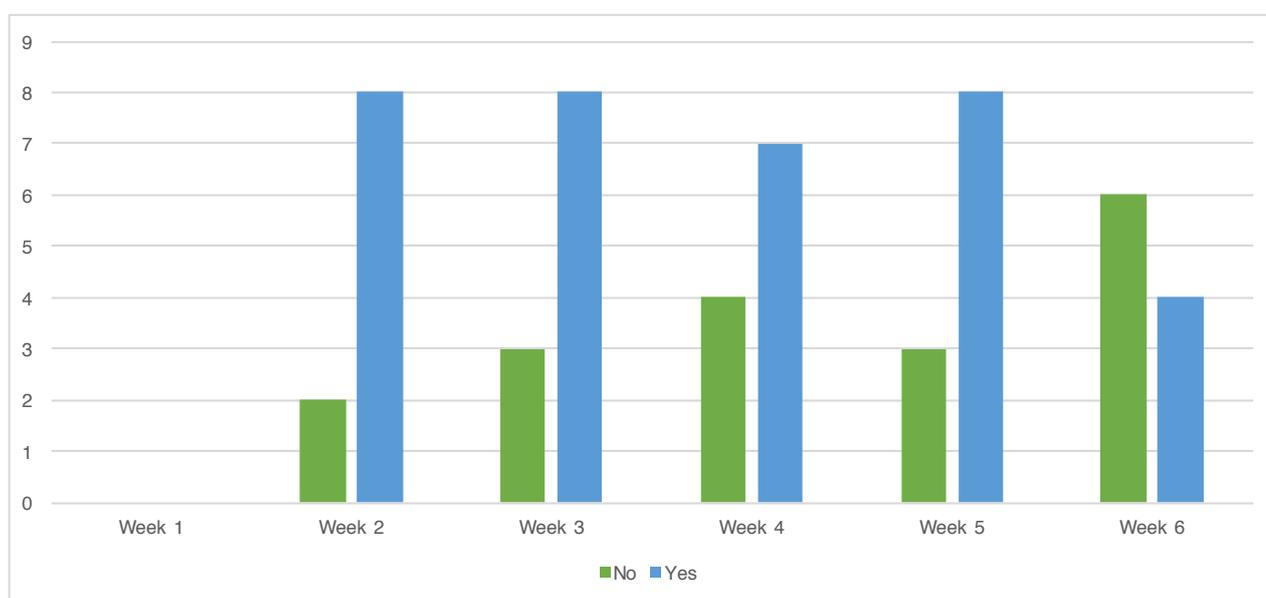


Country	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
<b>Brazil</b>			YES	YES	YES	YES
<b>China</b>					NO	
<b>France</b>		YES	YES	YES	YES	
<b>Germany</b>						
<b>India</b>		YES	YES	YES	YES	YES
<b>Italy</b>		YES	NO	YES	NO	NO
<b>Japan</b>		NO	NO	YES	YES	YES
<b>Russia</b>		YES	NO	NO	NO	NO
<b>South Korea</b>		YES	YES	YES	YES	NO
<b>Spain</b>		YES	YES	YES	YES	NO
<b>Turkey</b>		YES	YES	YES	YES	NO
<b>United Kingdom</b>		YES	YES	YES	YES	NO
<b>USA</b>		YES	YES	YES	YES	YES

## Q10

### Are your members experiencing issues with the transport of parts or equipment due to the closing of borders?

Fewer countries are now being impacted by boarder closing relating to transportation of parts and equipment between countries. Only Brazil, India, Japan, and the United States report continued negative impacts because of border closings.



Country	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
<b>Brazil</b>			YES	YES	YES	YES
<b>China</b>					YES	
<b>France</b>		NO	NO	NO		
<b>Germany</b>						
<b>India</b>		YES	YES	YES	YES	YES
<b>Italy</b>		YES	NO	NO	NO	NO
<b>Japan</b>		YES	YES	YES	YES	YES
<b>Russia</b>		YES	YES	YES	YES	NO
<b>South Korea</b>		YES	YES	YES	YES	NO
<b>Spain</b>		NO	NO	NO	NO	NO
<b>Turkey</b>		YES	YES	YES	YES	NO
<b>United Kingdom</b>		YES	YES	NO	NO	NO
<b>USA</b>		YES	YES	YES	YES	YES



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