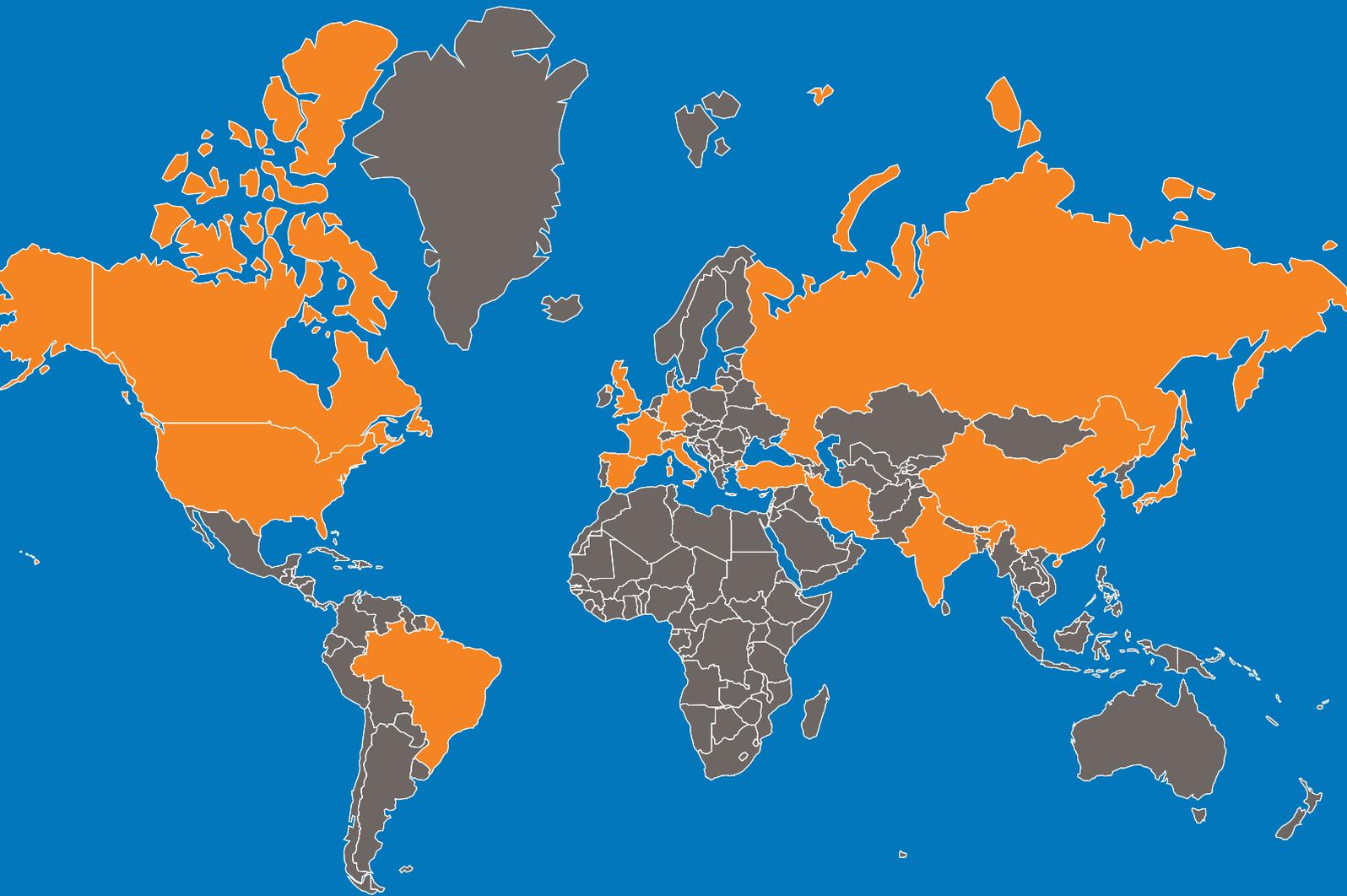


COVID-19 Impact survey #5

Reporting period April 16 - April 30



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

April, 30th 2020

Over the last two-week reporting period Italy, and Spain are joined by France in seeing declines in reported cases. China and South Korea are seeing a leveling off while the United Kingdom reports an increase after seeing some leveling off in the previous reporting period. All other countries report continued increases.

All regions are seeing manufacturing facilities being closed due to Covid-19. Two regions report at least 40% with India reporting significant closings between 61-80%. Six regions report closing ranging from 21 – 40% with four reporting facilities closing between 1-20%.

All regions are seeing manufacturing facilities being closed due to Covid-19. Two regions report at least 40% with India reporting significant closings between 61-80%. Six regions report closing ranging from 21–40% with four reporting facilities closing between 1-20%.

100% of regions now reporting disruption in the agriculture equipment manufacturing supply chains illustrating a significant change from the previous two weeks. Nine countries now report some disruptions with Brazil and Japan reporting that many suppliers are not able to fill orders.

New orders of whole goods are increasingly seeing declines. China, Italy, Russia, South Korea, and the United Kingdom see decreases on the 1-25% range with Spain, Turkey and the United States reporting decreases of 26-50%. Brazil, India, Japan, all report reductions of over 50% in whole good orders.

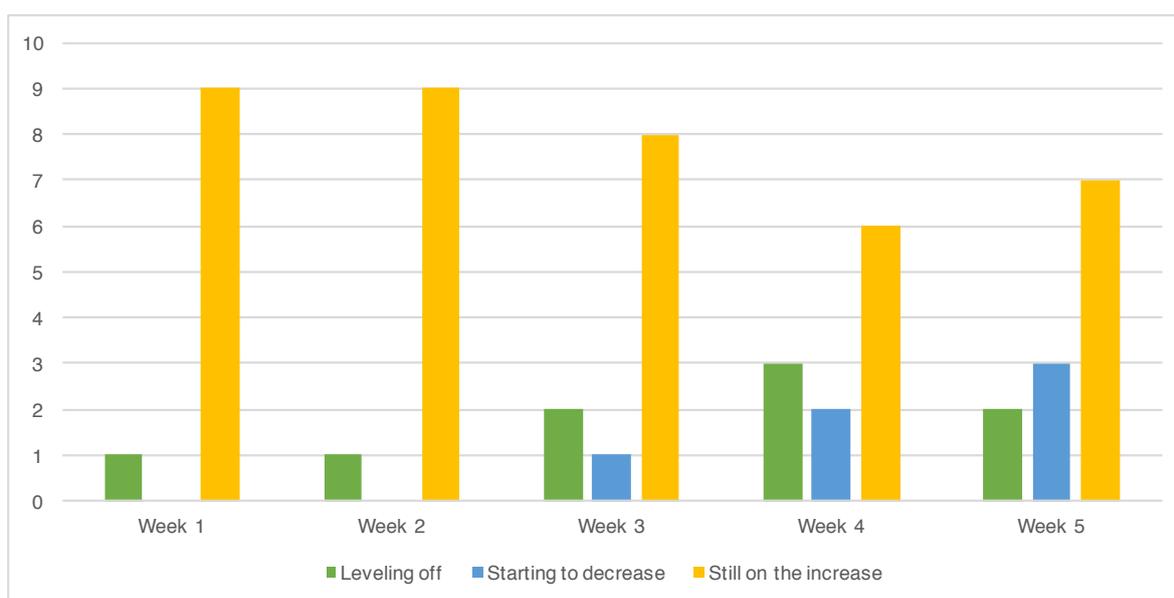
Charlie O'Brien

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?

Italy, Spain and France in seeing declines in reported cases. China and South Korea are seeing a leveling off while the United Kingdom reports an increase after seeing some leveling off in the previous reporting period. All other countries report continued increases.



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

SOI = Still on the increase

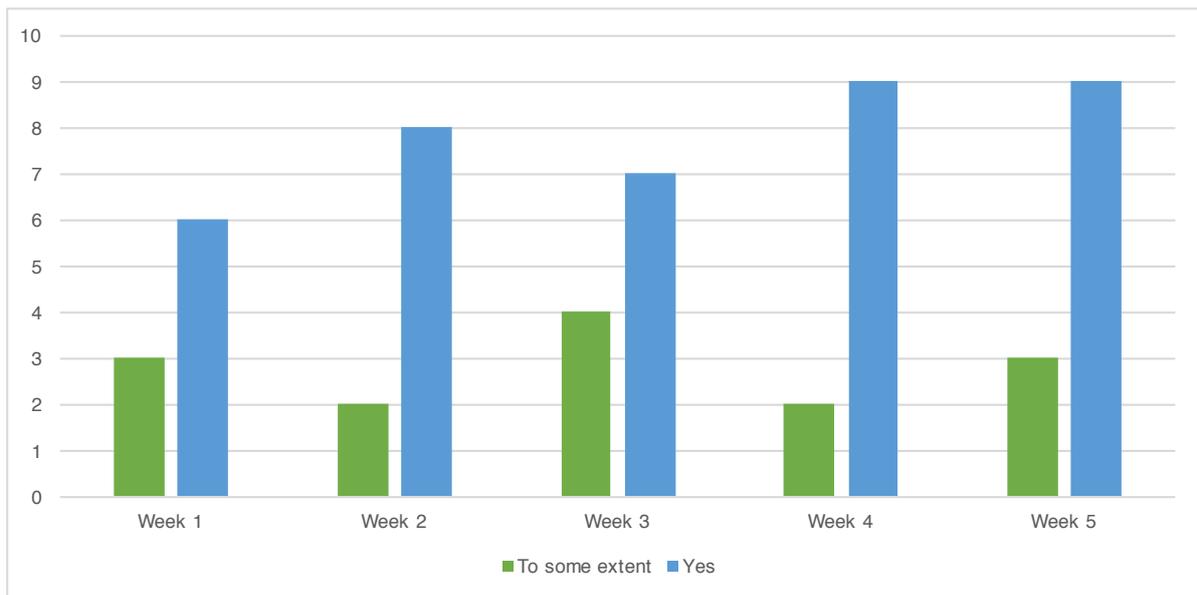
LO = Leveling off

STD = Starting to decrease

Q2

Has international travel for people been banned at this point?

All countries have put some level of restrictions in place for international travel. Only the UK, China and the United States still permit limited international travel of people while all other countries have banned international travel.



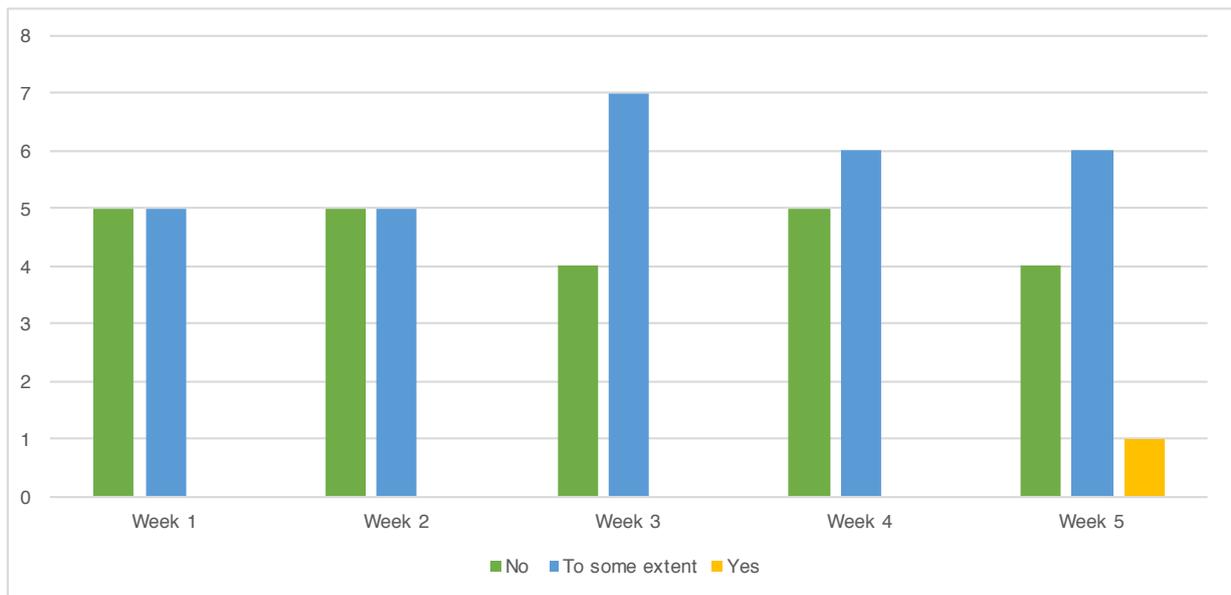
Country	Week 1	Week 2	Week 3	Week 4	Week 5
Brazil			YES	YES	YES
China					TSE
France	YES	YES	TSE	YES	YES
Germany	YES				
India		YES	YES	YES	YES
Italy	YES	YES	YES	YES	YES
Japan	TSE	YES	YES	YES	YES
Russia	YES	YES	YES	YES	YES
South Korea		YES	TSE	YES	YES
Spain	YES	YES	YES	YES	YES
Turkey	YES	YES	YES	YES	YES
United Kingdom	TSE	TSE	TSE	TSE	TSE
USA	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?

Approximately half of reporting countries continue to place restrictions on the free flow of imports and exports of commodities.



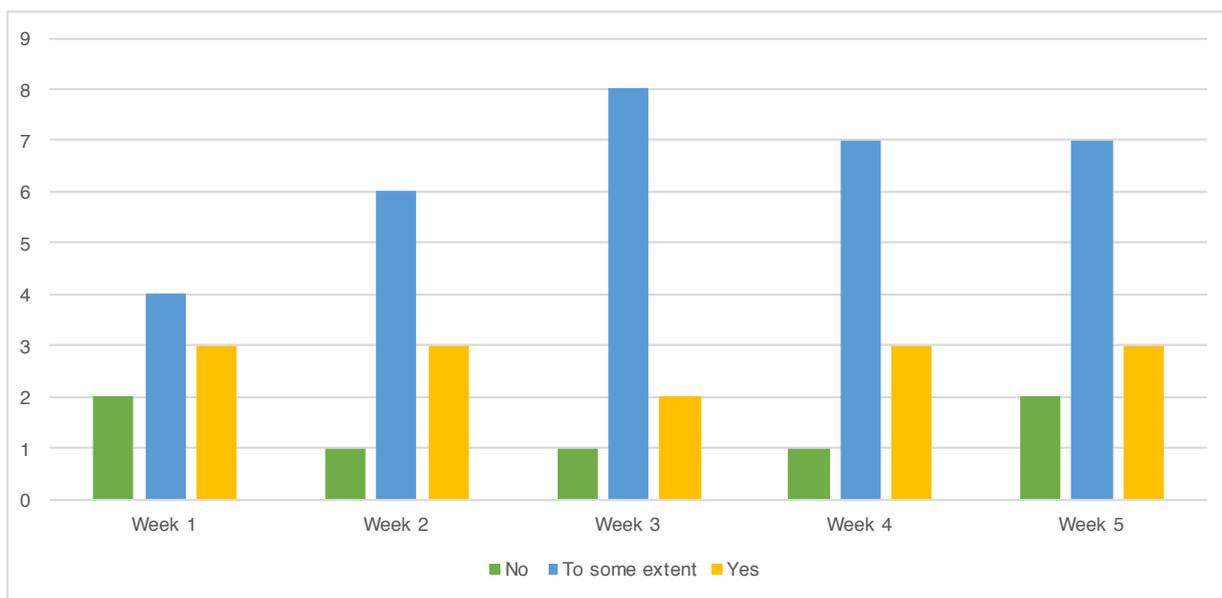
Country	Week 1	Week 2	Week 3	Week 4	Week 5
Brazil			TSE	TSE	TSE
China					TSE
France	NO	NO	NO	NO	YES
Germany	NO				
India		TSE	TSE	TSE	TSE
Italy	TSE	NO	NO	NO	NO
Japan	NO	NO	NO	NO	
Russia	TSE	TSE	TSE	TSE	NO
South Korea	TSE	TSE	TSE	TSE	TSE
Spain	TSE	TSE	TSE	TSE	TSE
Turkey	NO	NO	NO	NO	NO
United Kingdom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

TSE = To some extent

Q4

Has domestic travel of people been banned at this point?

Currently Japan and South Korea are the only countries that do not have restrictions on domestic travel of people. France, India, Italy, have banned domestic travel while all other countries indicate some restrictions on domestic travel.



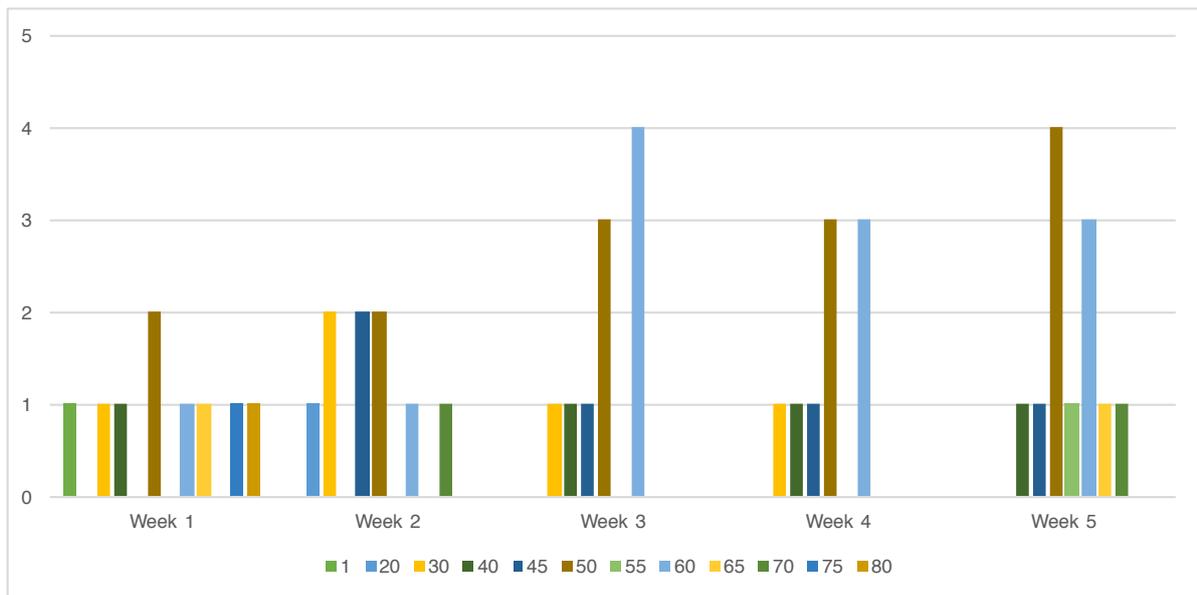
Country	Week 1	Week 2	Week 3	Week 4	Week 5
Brazil			TSE	YES	TSE
China					TSE
France	YES	YES	TSE	YES	YES
Germany	YES				
India		YES	YES	YES	YES
Italy	YES	YES	YES	TSE	YES
Japan	NO	NO	NO	NO	NO
Russia	NO	TSE	TSE	TSE	TSE
South Korea	TSE	TSE	TSE	TSE	NO
Spain	TSE	TSE	TSE	TSE	TSE
Turkey		TSE	TSE	TSE	TSE
United Kingdom	TSE	TSE	TSE	TSE	TSE
USA	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 countries indicating a significant degradation in the business climate today. Nine countries report the climate rating today at 60 or less compared to normal.

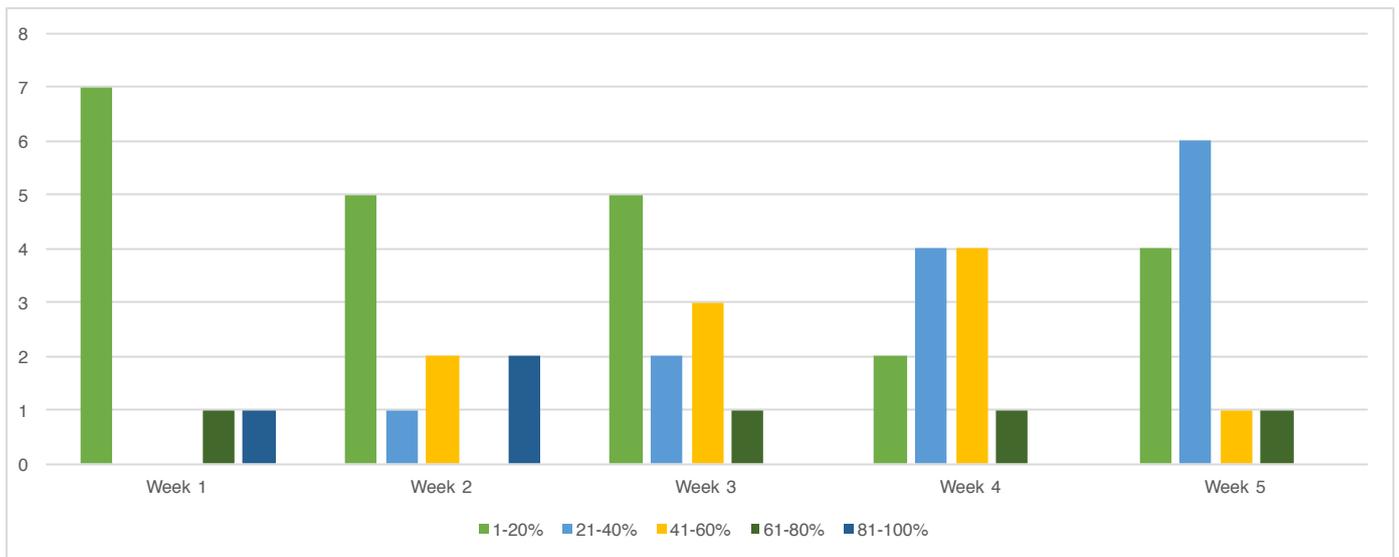


Country	Week 1	Week 2	Week 3	Week 4	Week 5
Brazil			40-50	30	40
China					50
France	75	50	60	50	65
Germany	50				
India		30	30	50	50
Italy	1	50	50		60
Japan	80	70	60	50	50
Russia	30-40	20	60	60	70
South Korea	40	< 50	60	60	60
Spain	50	45	50	40	55
Turkey	30	30	45	60	60
United Kingdom	65	45	40		50
USA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

Q6

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

All regions are seeing manufacturing facilities being closed due to Covid-19. Two regions report at least 40% with India reporting significant closings between 61-80%. Six regions report closing ranging from 21–40% with four reporting facilities closing between 1-20%.



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

100% of regions now reporting disruption in the agriculture equipment manufacturing supply chains illustrating a significant change from the previous weeks ago. Nine countries now report some disruptions with Brazil and Japan reporting that many suppliers are not able to fill orders.



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

ND = No disruption

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

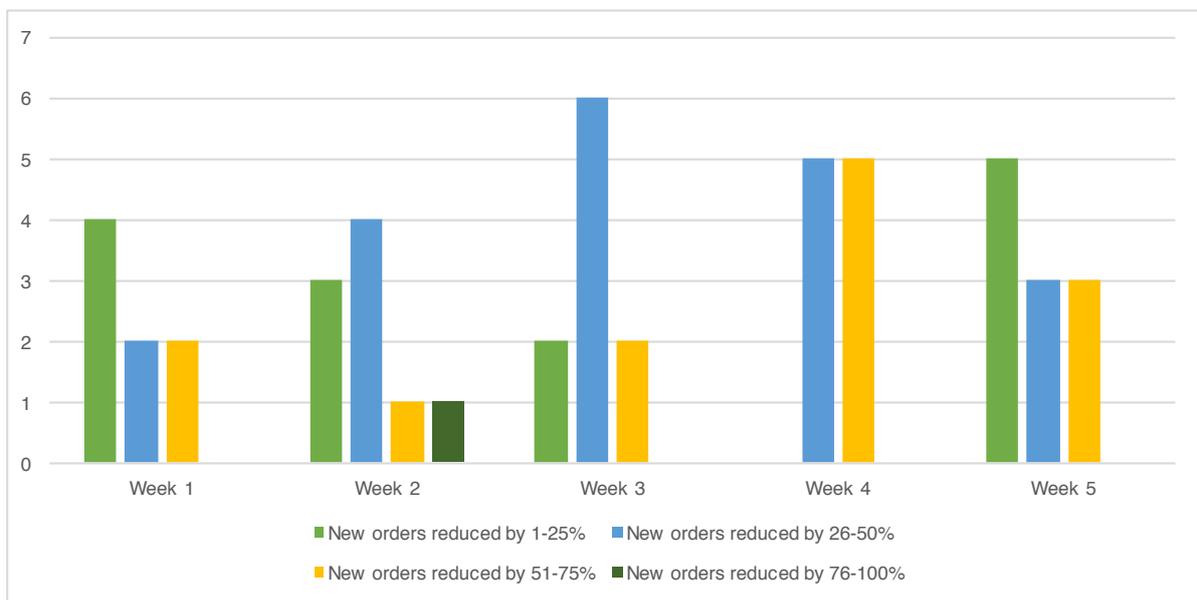
NA = Companies are seeing many suppliers not able to fill orders

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

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. China, Italy, Russia, South Korea, and the United Kingdom see decreases on the 1-25% range with Spain, Turkey and the United States reporting decreases of 26-50%. Brazil, India, Japan, all report reductions of over 50% in whole good orders.

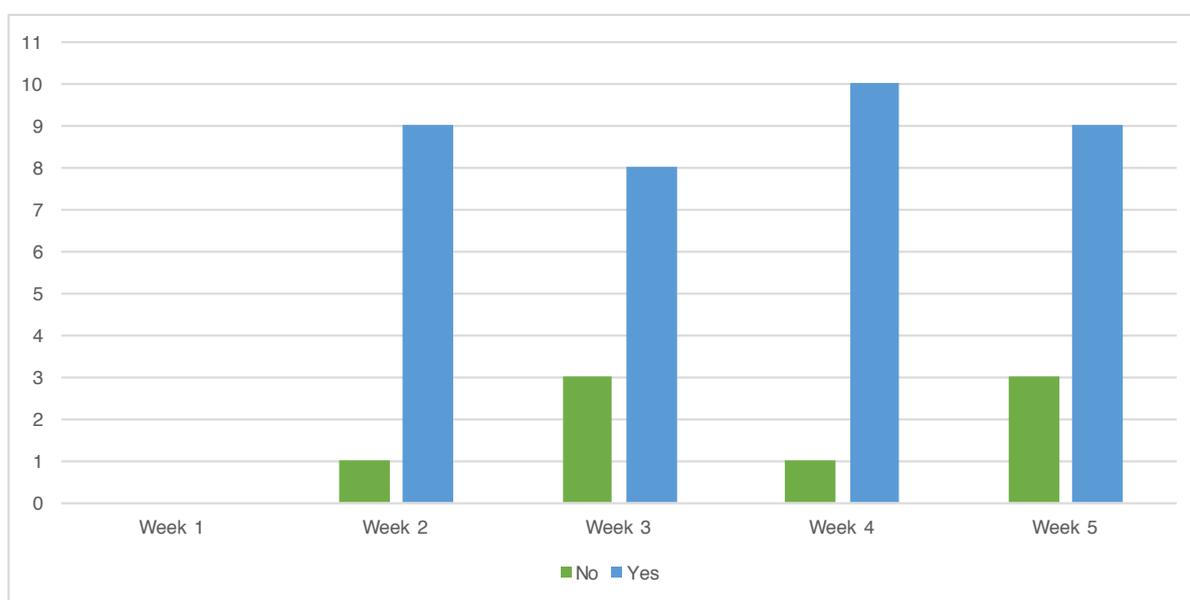


Country	Week 1	Week 2	Week 3	Week 4	Week 5
Brazil	(vacío)	(vacío)	↓ [26-50%]	↓ [26-50%]	↓ [51-75%]
China					↓ [1-25%]
France	↓ [26-50%]	↓ [26-50%]	↓ [26-50%]	↓ [51-75%]	
Germany	↓ [1-25%]				
India		↓ [76-100%]	↓ [26-50%]	↓ [51-75%]	↓ [51-75%]
Italy	↓ [26-50%]	↓ [26-50%]	↓ [26-50%]	↓ [26-50%]	↓ [1-25%]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

Q9

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

China, Italy, and Russia report they are now not impacted by transportation of parts and equipment by trucks and/or ships. All other reporting countries continue to see disruptions in transportation services.

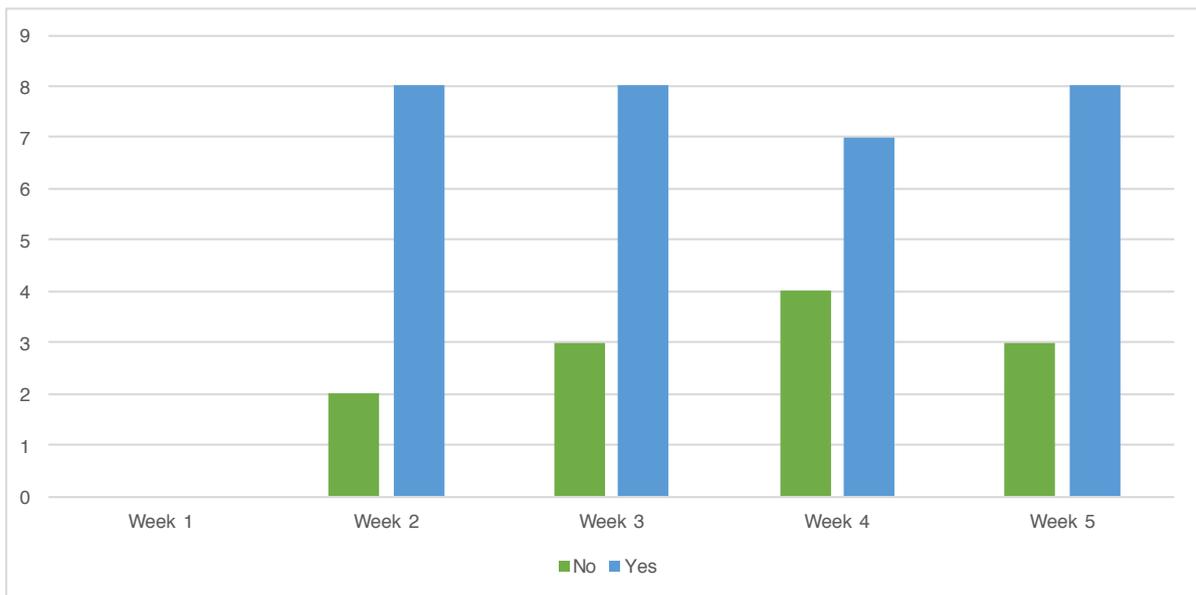


Country	Week 1	Week 2	Week 3	Week 4	Week 5
Brazil			YES	YES	YES
China					NO
France		YES	YES	YES	YES
Germany					
India		YES	YES	YES	YES
Italy		YES	NO	YES	NO
Japan		NO	NO	YES	YES
Russia		YES	NO	NO	NO
South Korea		YES	YES	YES	YES
Spain		YES	YES	YES	YES
Turkey		YES	YES	YES	YES
United Kingdom		YES	YES	YES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

Q10

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

Italy, Spain, and the United Kingdom are not being impacted by border closings in the movement parts and whole goods between countries. All other reporting countries are being impacted at this time.



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



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