• Purpose: a quick scan assessment of the COVID-19 situation amongst the European dealers
• Running time: the survey was held between 8-29 of May 2020
• Participation: 14 countries participated in the survey
• Responses: in total 660 dealer companies responded to the survey
PART 1: Comparison between the participating countries
In which segment are your main activities?

- 2.1: Agricultural machinery
- 2.2: Livestock farming machinery
- 2.3: Gardening machinery
- 2.4: Construction & Material Handling machinery
- 2.5: Vineyard machinery

Specific countries and segments have different percentages.
Are you currently experiencing consequences due to the COVID-19 crisis?

1.20: Netherlands
1.6: Germany
1.8: Italy
1.16: United Kingdom
1.1: Austria
1.2: Belgium
1.14: Sweden
1.4: Denmark
1.3: Czech Republic
1.3: Slovakia
1.7: Hungary
1.12: Poland
1.10: Luxembourg
1.9: Latvia
In which part of your company do you experience the most impact of the COVID-19 Crisis?

- 1.20: Netherlands
- 1.6: Germany
- 1.8: Italy
- 1.16: United Kingdom
- 1.1: Austria
- 1.2: Belgium
- 1.14: Sweden
- 1.4: Denmark
- 1.3: Czech Republic
- 1.13: Slovakia
- 1.7: Hungary
- 1.12: Poland
- 1.10: Luxembourg
- 1.9: Latvia

- 7.1: Repair & Maintenance workshop
- 7.2: Components & Parts shop
- 7.3: Sales Department
- 7.4: Administration Office
What is the current turnover situation in the Repair & Maintenance Workshop compared to 2019?
What is the current turnover situation in the Component &Parts shop compared to 2019?
What is the current turnover and orderbook situation with sales of new machinery compared to 2019?

- 10.1: Increased more than 10%
- 10.2: Increased less than 10%
- 10.3: Virtually not changed
- 10.4: Decreased less than 10%
- 10.5: Decreased more than 10%
- 10.6: Decreased more than 25%

### Countries and Percentage Distributions

1. Netherlands: 16%
2. Germany: 19%
3. Italy: 22%
4. United Kingdom: 24%
5. Austria: 33%
6. Belgium: 28%
7. Sweden: 24%
8. Denmark: 21%
9. Czech Republic: 25%
10. Slovakia: 19%
11. Hungary: 41%
12. Poland: 30%
13. Luxembourg: 56%
14. Latvia: 33%
What is the current turnover situation with sales of used machinery compared to 2019?
What do you expect your company's turnover and orderbook to be affected in the coming 3 months?

12.1: Increase more than 10%
12.2: Increase less than 10%
12.3: Virtually no change
12.4: Decrease less than 10%
12.5: Decrease more than 10%
12.6: Decrease more than 25%
What measures are already been to minimize the consequences?

- 13.1: Working time reduction
- 13.2: Working in multiple shifts
- 13.3: Making office workers and sales people work from home
- 13.4: Limitation of flexible workforce
- 13.5: Firing of staff
- 13.6: Phasing out production / work
- 13.7: Temporary closure of company

Countries included:
- Germany
- Austria
- Sweden
- Czech Republic
- Denmark
- Slovakia
- Hungary
- Poland
- Latvia

Values represent the percentage of each measure taken in each country.
Do you need support to overcome this COVID-19 crisis?

- 15.1: Yes, for sure
- 15.2: Maybe
- 15.3: Do not know
- 15.4: Maybe not
- 15.5: Not at all

Countries:
- 1.20: Netherlands
- 1.6: Germany
- 1.8: Italy
- 1.16: United Kingdom
- 1.1: Austria
- 1.2: Belgium
- 1.14: Sweden
- 1.4: Denmark
- 1.3: Czech Republic
- 1.13: Slovakia
- 1.7: Hungary
- 1.12: Poland
- 1.10: Luxembourg
- 1.9: Latvia

Percentage distributions vary across countries.
If you need support, what measures do you expect to need?

- 16.1: Acceptable terms for credit by banks
- 16.2: Acceptable terms for stock financing by manufacturers and...
- 16.3: Delay of tax payment by government
- 16.4: Limited labour costs (suspend labour cost increases)
- 16.5: A flexible deployment of labour and leave scheme
- 16.6: Sales loss allowance
- 16.7: Opening of borders

Countries and Measures:
- 1.2: Germany
- 1.8: Italy
- 1.9: Latvia
- 1.1: United Kingdom
- 1.2: Belgium
- 1.3: Czech Republic
- 1.4: Denmark
- 1.10: Luxembourg
- 1.12: Poland
- 1.13: Slovakia
- 1.7: Hungary
- 1.14: Sweden
- 1.16: Italy
- 1.1: Austria

Percentage of Survey Respondents by Country and Measure.
PART 2: Compiled results of all participating countries
In which segment are your main activities?

- 2.1: Agricultural machinery: 76%
- 2.2: Livestock farming machinery: 4%
- 2.3: Gardening machinery: 4%
- 2.4: Construction & Material Handling machinery: 3%
- 2.5: Vineyard machinery: 12%
Are you currently experiencing consequences due to the COVID-19 crisis?

- 61%: Yes, a lot
- 21%: No, hardly
- 19%: Yes, but limited
Has your turnover and order book already been affected compared to 2019?

- 29%: Decreased more than 25%
- 23%: Increased more than 10%
- 19%: Decreased less than 10%
- 19%: Increased less than 10%
- 5%: Virtually not changed
- 5%: Decreased more than 10%
In which part of your company do you experience the most impact of the COVID-19 Crisis?

- 74%: Sales Department
- 12%: Components & Parts shop
- 10%: Repair & Maintenance workshop
- 4%: Administration Office
What is the current turnover situation in the Repair & Maintenance Workshop compared to 2019?

- 45%: Virtually not changed
- 18%: Increased more than 10%
- 13%: Increased less than 10%
- 10%: Decreased less than 10%
- 7%: Decreased more than 10%
- 7%: Decreased more than 25%
What is the current turnover situation in the Component & Parts shop compared to 2019?

- 40%: Virtually not changed
- 20%: Increased more than 10%
- 16%: Increased less than 10%
- 12%: Decreased less than 10%
- 7%: Decreased more than 10%
- 6%: Decreased more than 25%
What is the current turnover and orderbook situation with sales of new machinery compared to 2019?

- 28%: Increased more than 10%
- 22%: Decreased less than 10%
- 18%: Virtually not changed
- 20%: Increased more than 10%
- 6%: Decreased more than 25%
- 6%: Decreased more than 10%
What is the current turnover situation with sales of used machinery compared to 2019?

- 41% of respondents reported virtually no change.
- 18% reported increased sales by less than 10%.
- 17% reported increased sales by more than 10%.
- 12% reported decreased sales by less than 10%.
- 7% reported decreased sales by more than 25%.
- 5% reported decreased sales by more than 10%.
What do you expect your company's turnover and orderbook to be affected in the coming 3 months?

- 31%: Increase more than 10%
- 25%: Increase less than 10%
- 19%: Virtually no change
- 16%: Decrease less than 10%
- 6%: Decrease more than 10%
- 3%: Decrease more than 25%
What measures are already been taken to minimize the consequences?

- 13.1: Working time reduction (32%)
- 13.3: Making office workers and sales people work from home (34%)
- 13.4: Limitation of flexible workforce (15%)
- 13.2: Working in multiple shifts (15%)
- 13.6: Phasing out production / work (3%)
- 13.5: Firing of staff (1%)
- 13.7: Temporary closure of company (0.1%)
Do you need support to overcome this COVID-19 crisis?

- 24%: Yes, for sure
- 18%: Not at all
- 27%: Do not know
- 18%: Maybe
- 13%: Maybe not
If you need support, what measures do you expect to need?

- **16.1: Acceptable terms for credit by banks** - 34%
- **16.2: Acceptable terms for stock financing by manufacturers and/or producers and/or importers** - 26%
- **16.3: Delay of tax payment by government** - 11%
- **16.4: Limited labour costs (suspend labour cost increases)** - 10%
- **16.6: Sales loss allowance** - 7%
- **16.7: Opening of borders** - 7%
- **16.5: A flexible deployment of labour and leave scheme** - 5%