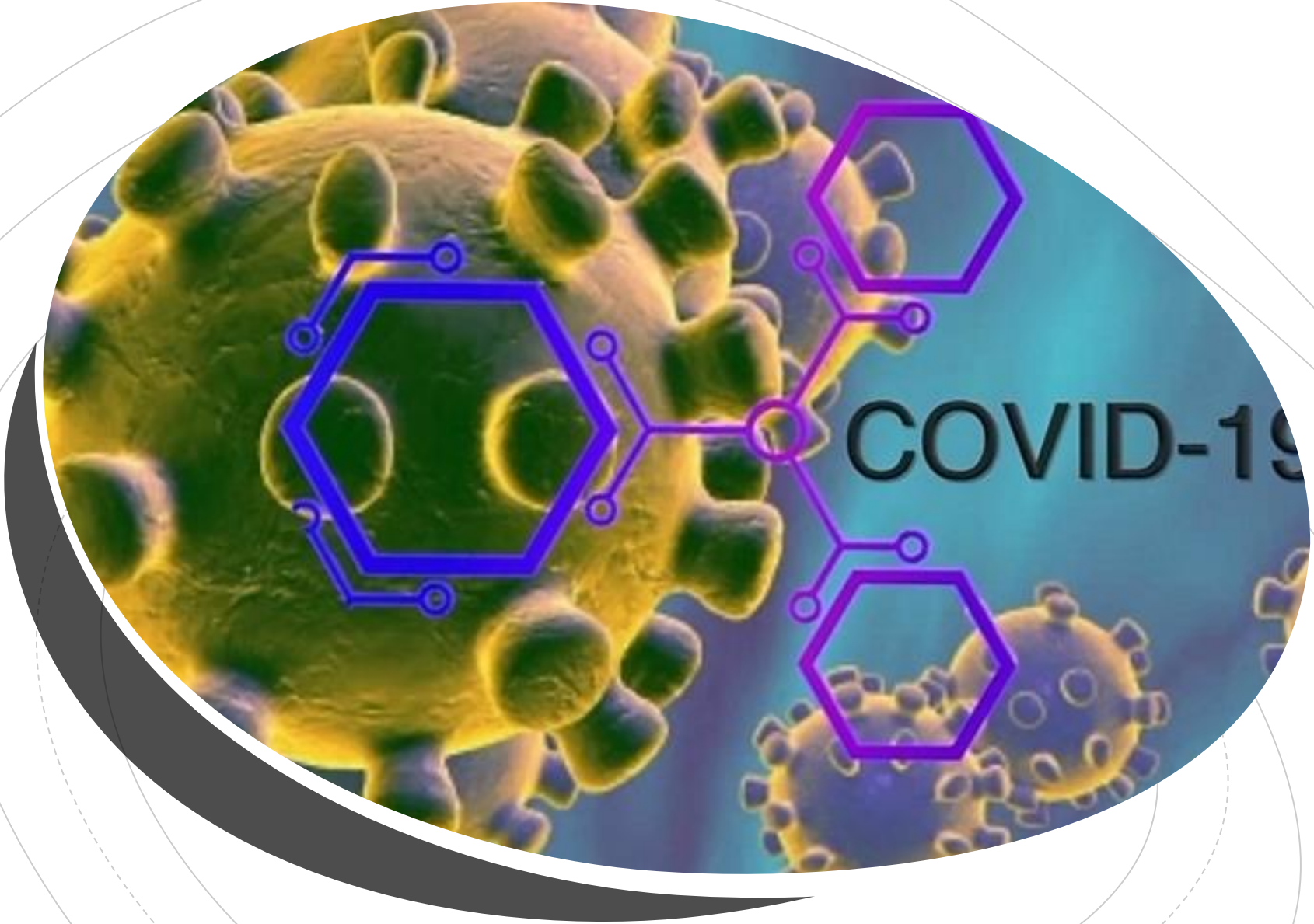
CLIMMAR COVID-19 SURVEY
May 2020

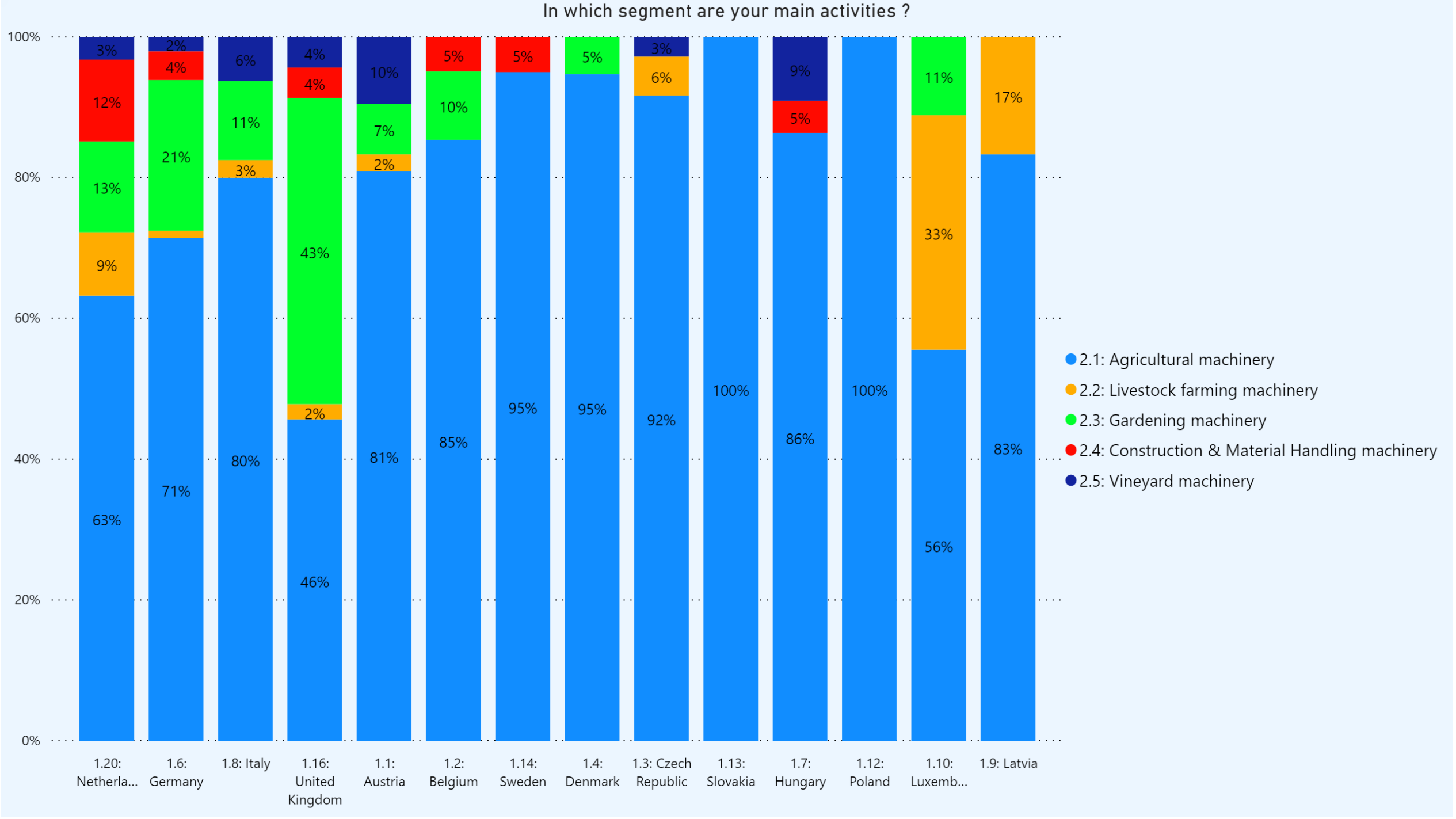


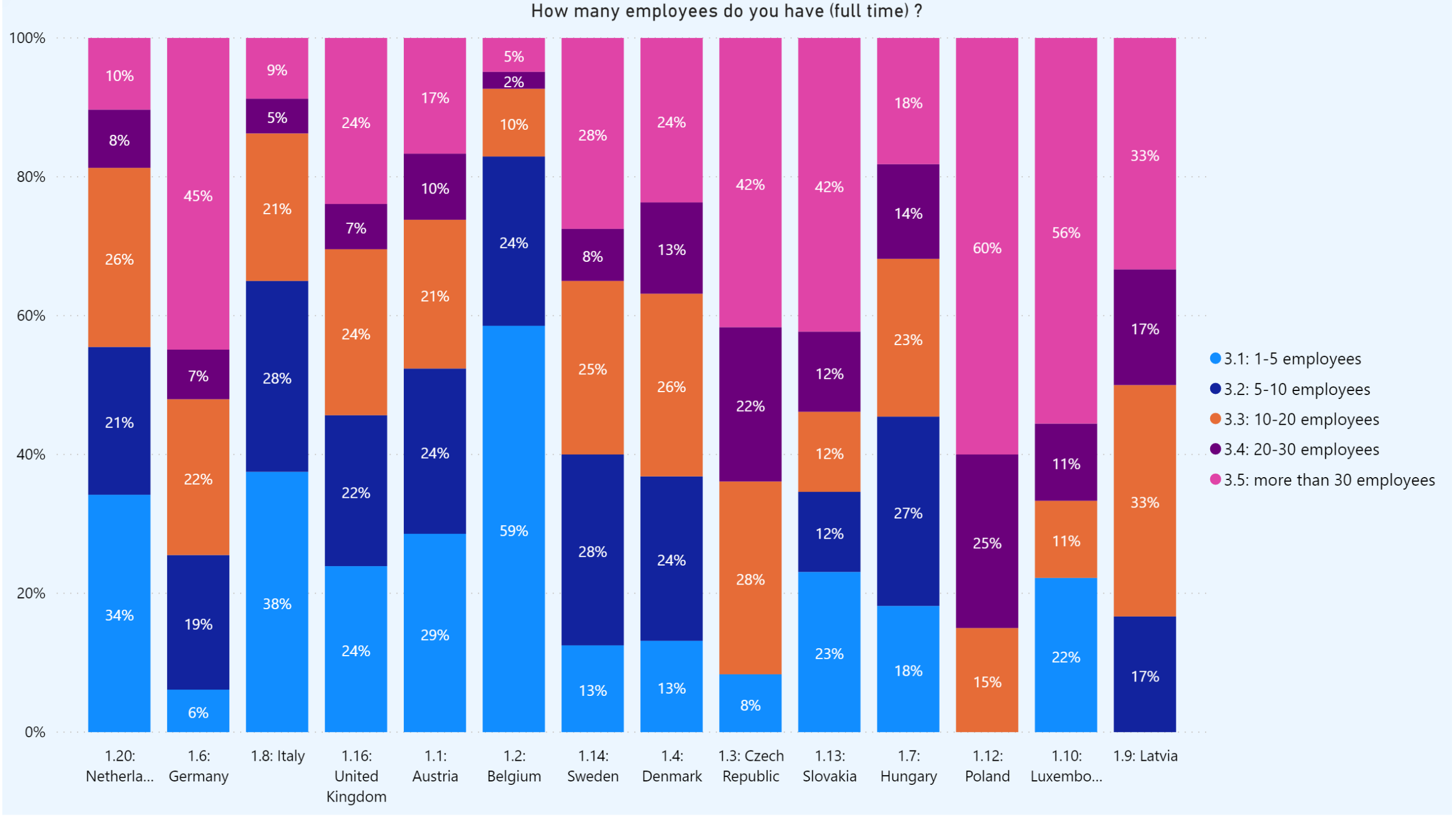
CLIMMAR COVID-19 SURVEY

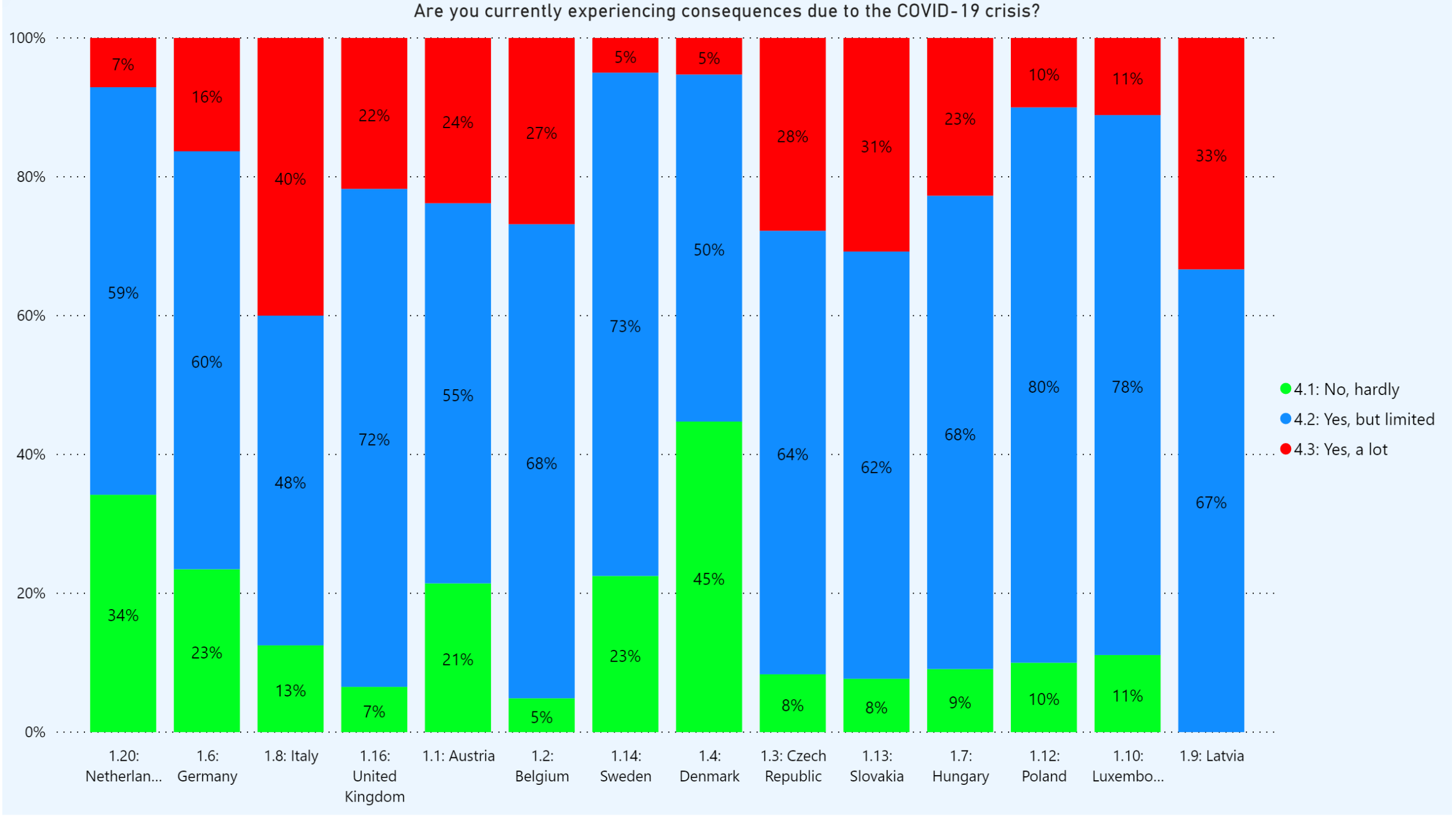
- Purpose: a quick scan assessment of the COVID-19 situation amongst the European dealers
- Running time: the survey was held between 8-29 of May 2020
- Participation: 14 countries participated in the survey
- Responses: in total 660 dealercompanies responded to the survey

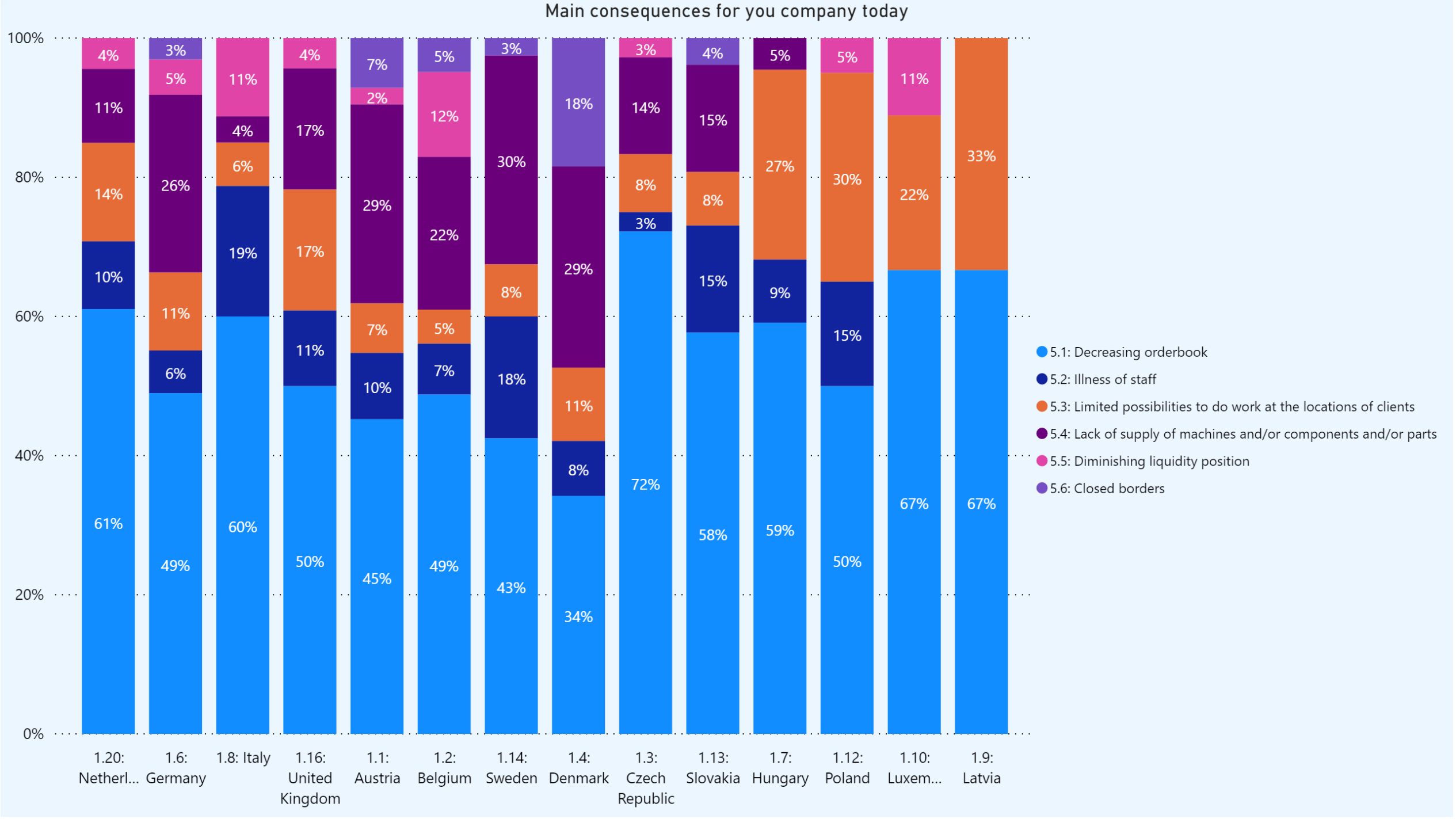
CLIMMAR COVID-19 SURVEY

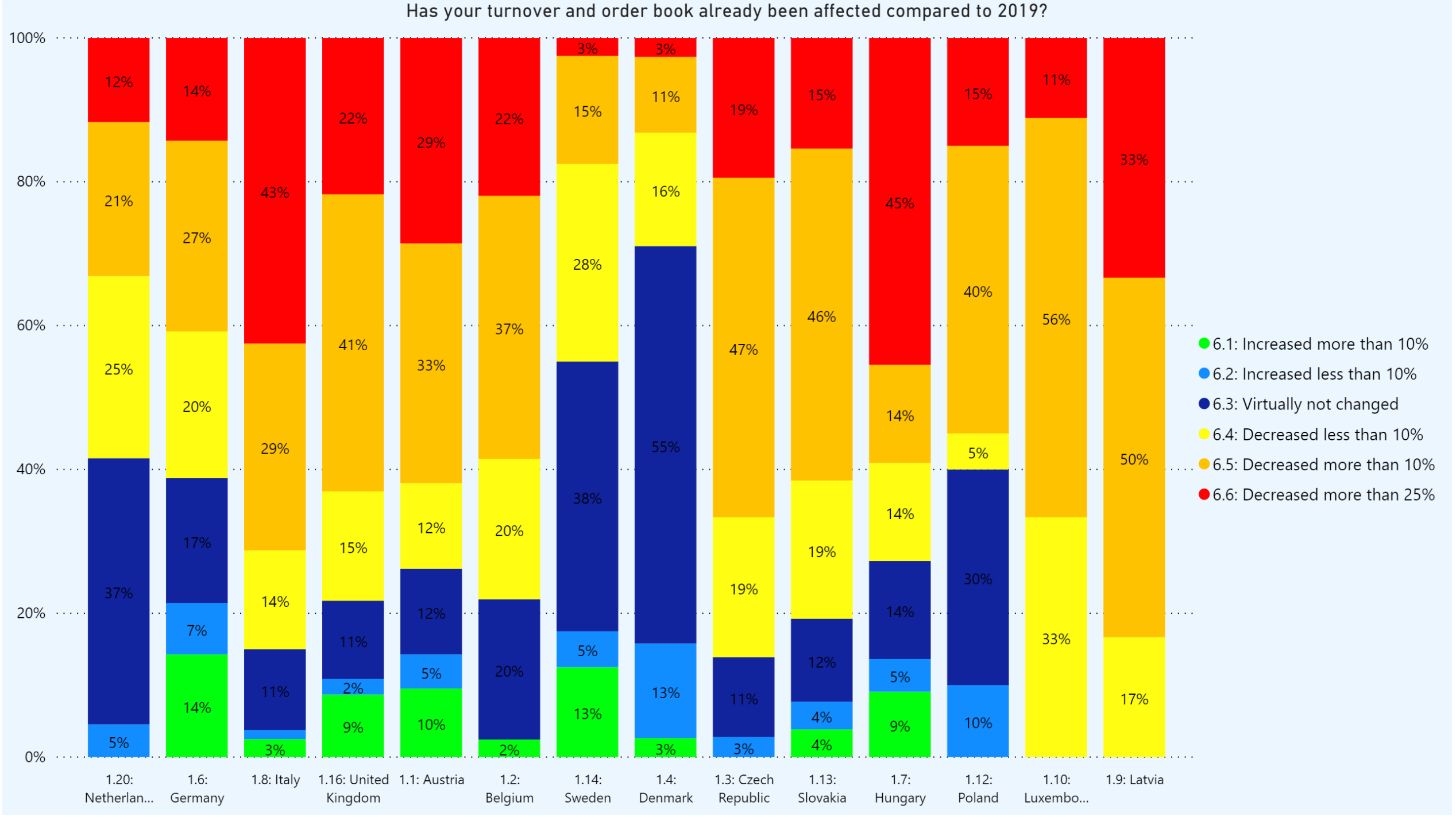
PART 1: Comparison between the participating countries

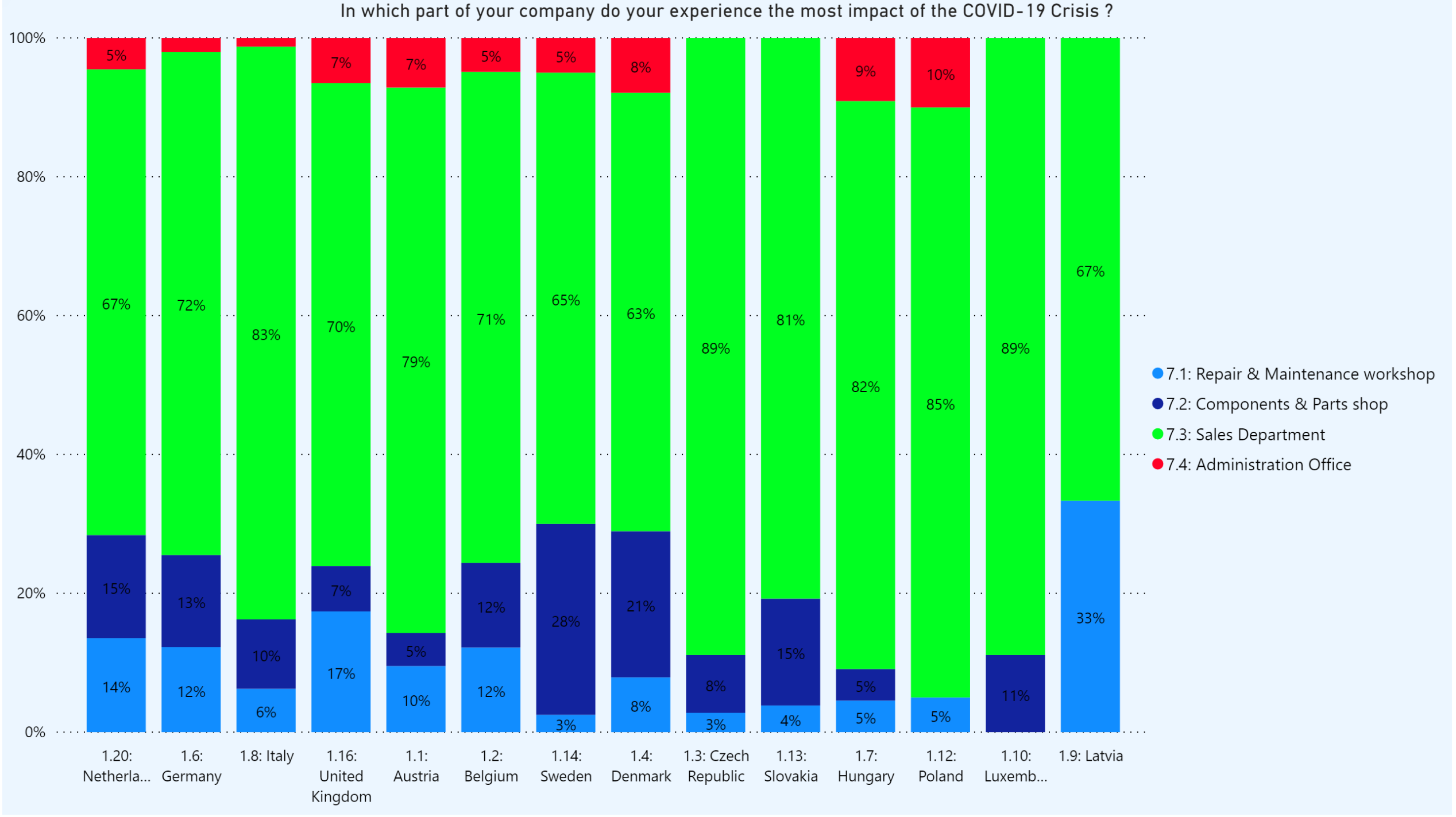

In which segment are your main activities ?
100%
80%
60%
40%
20%
0%
3%
12%
13%
9%
63%
2%
4%
21%
71%
6%
11%
3%
80%
4%
4%
43%
2%
46%
10%
7%
2%
81%
5%
10%
85%
5%
95%
5%
95%
3%
6%
92%
100%
9%
5%
86%
100%
11%
33%
56%
17%
83%
1.20: Netherla...
1.6: Germany
1.8: Italy
1.16: United Kingdom
1.1: Austria
1.2: Belgium
1.14: Sweden
1.4: Denmark
1.3: Czech Republic
1.13: Slovakia
1.7: Hungary
1.12: Poland
1.10: Luxemb...
1.9: Latvia
2.1: Agricultural machinery
2.2: Livestock farming machinery
2.3: Gardening machinery
2.4: Construction & Material Handling machinery
2.5: Vineyard machinery

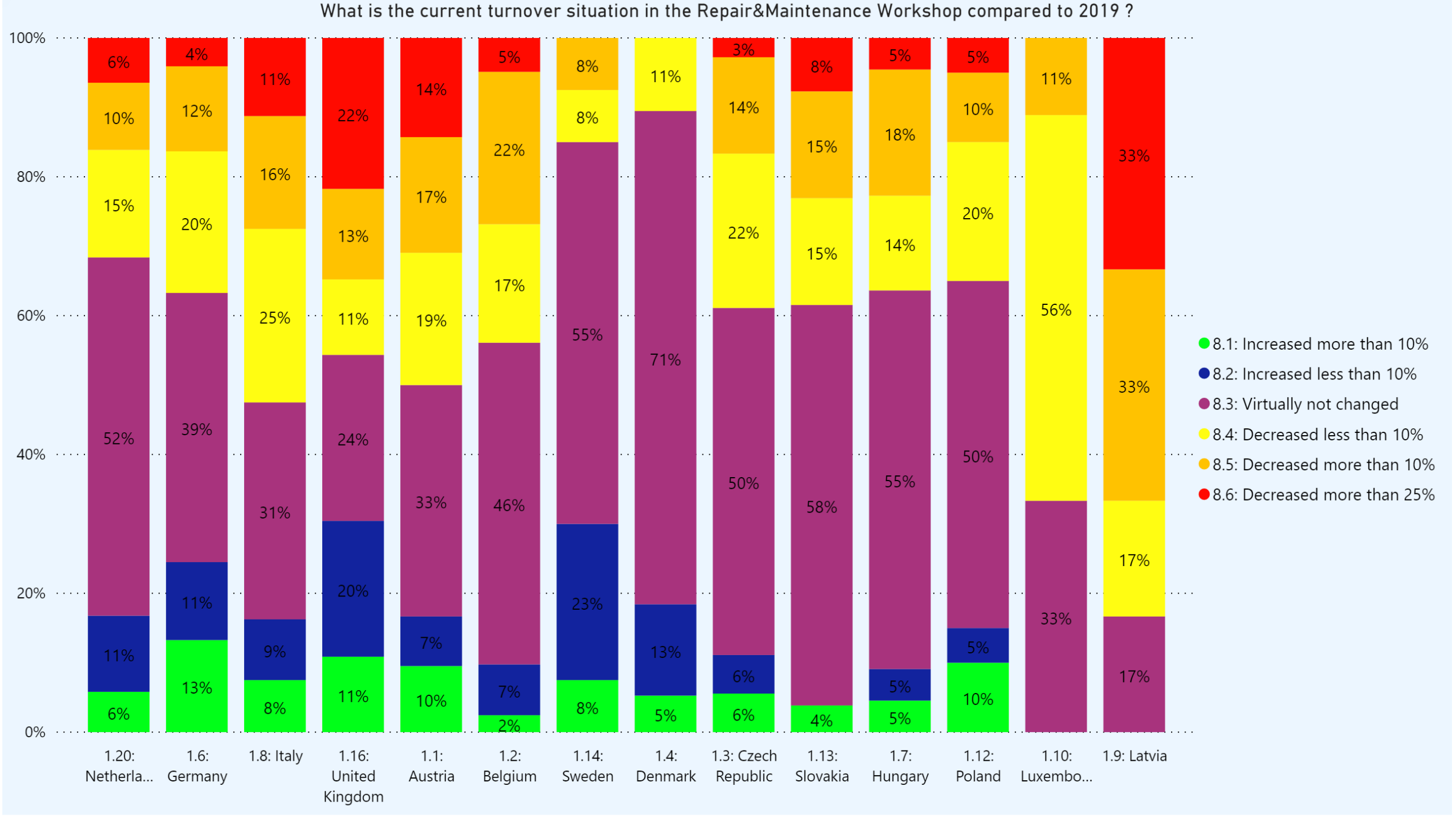

How many employees do you have (full time) ?
100%
80%
60%
40%
20%
0%
10%
8%
26%
21%
34%
45%
7%
22%
19%
6%
9%
5%
21%
28%
38%
24%
7%
24%
22%
24%
17%
10%
21%
24%
29%
5%
2%
10%
24%
59%
28%
8%
25%
28%
13%
24%
13%
26%
24%
13%
42%
22%
28%
8%
42%
12%
12%
12%
23%
18%
14%
23%
27%
18%
60%
25%
15%
56%
11%
11%
22%
33%
17%
17%
1.20: Netherla...
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: Luxembo...
1.9: Latvia
3.1: 1-5 employees
3.2: 5-10 employees
3.3: 10-20 employees
3.4: 20-30 employees
3.5: more than 30 employees

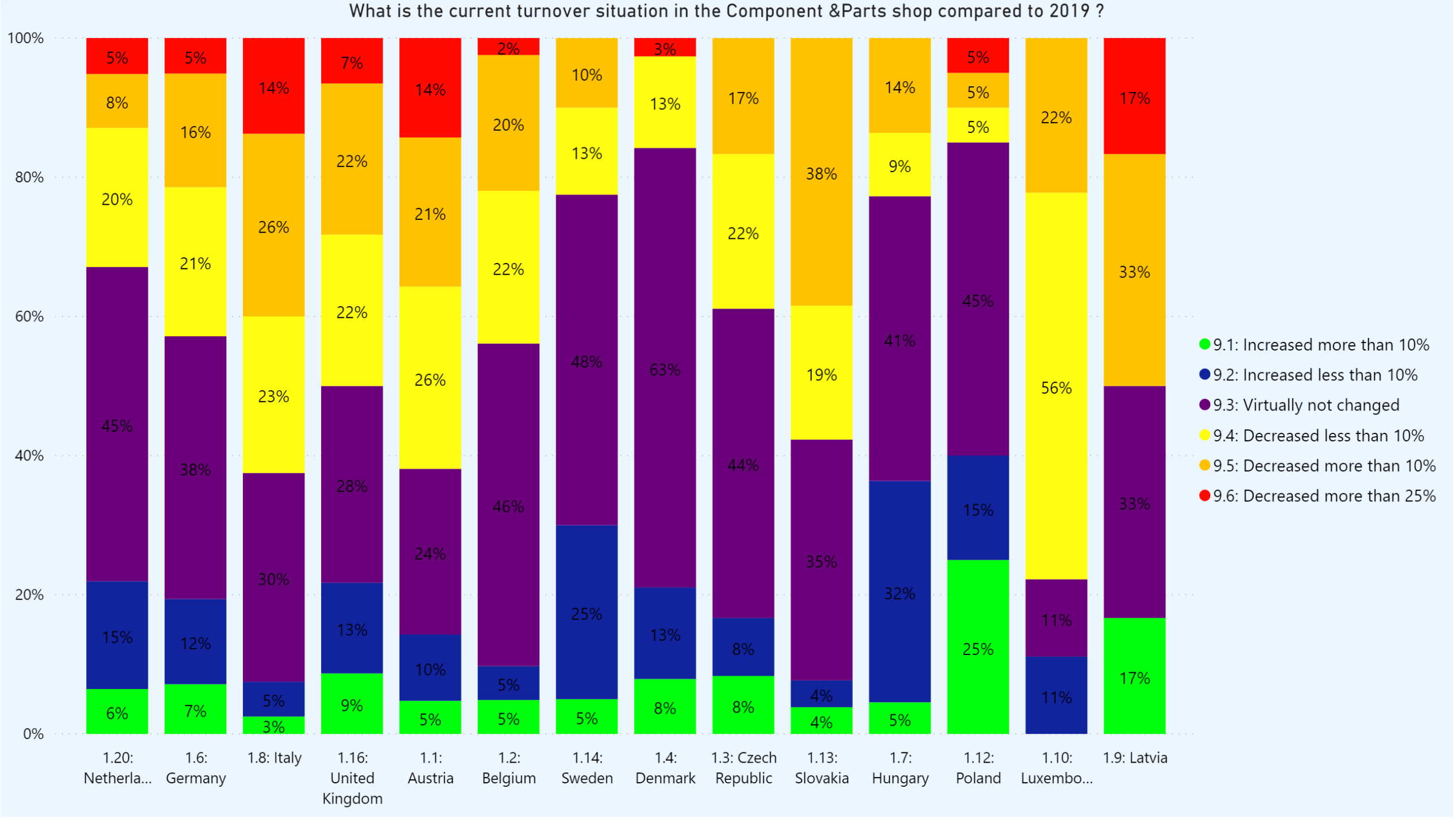

Are you currently experiencing consequences due to the COVID-19 crisis?
100%
80%
60%
40%
20%
0%
7%
59%
34%
16%
60%
23%
40%
48%
13%
22%
72%
7%
24%
55%
21%
27%
68%
5%
5%
73%
23%
5%
50%
45%
28%
64%
8%
31%
62%
8%
23%
68%
9%
10%
80%
10%
11%
78%
11%
33%
67%
1.20: Netherlan...
1.6: Germany
1.8: Italy
1.16: 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: Luxembo...
1.9: Latvia
4.1: No, hardly
4.2: Yes, but limited
4.3: Yes, a lot

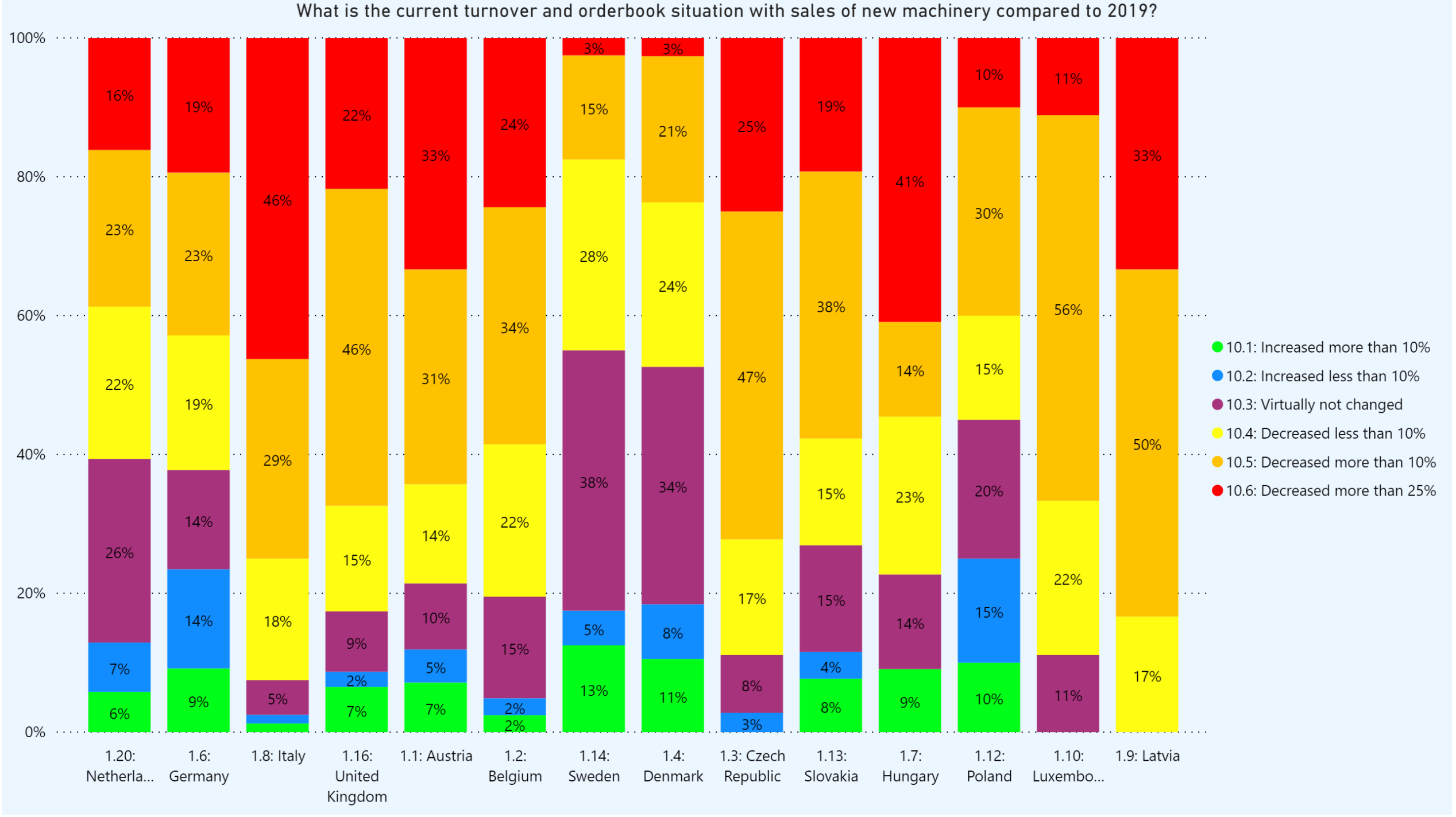

Main consequences for you company today
100%
80%
60%
40%
20%
0%
1.20: Netherl...
1.6: Germany
1.8: Italy
1.16: United Kingdom
1.1: Austria
1.2: Belgium
1.14: Sweden
1.4: Denmark
1.3: Czech Republic
1.13: Slovakia
1.7: Hungary
1.12: Poland
1.10: Luxem...
1.9: Latvia
5.1: Decreasing orderbook
5.2: Illness of staff
5.3: Limited possibilities to do work at the locations of clients
5.4: Lack of supply of machines and/or components and/or parts
5.5: Diminishing liquidity position
5.6: Closed borders

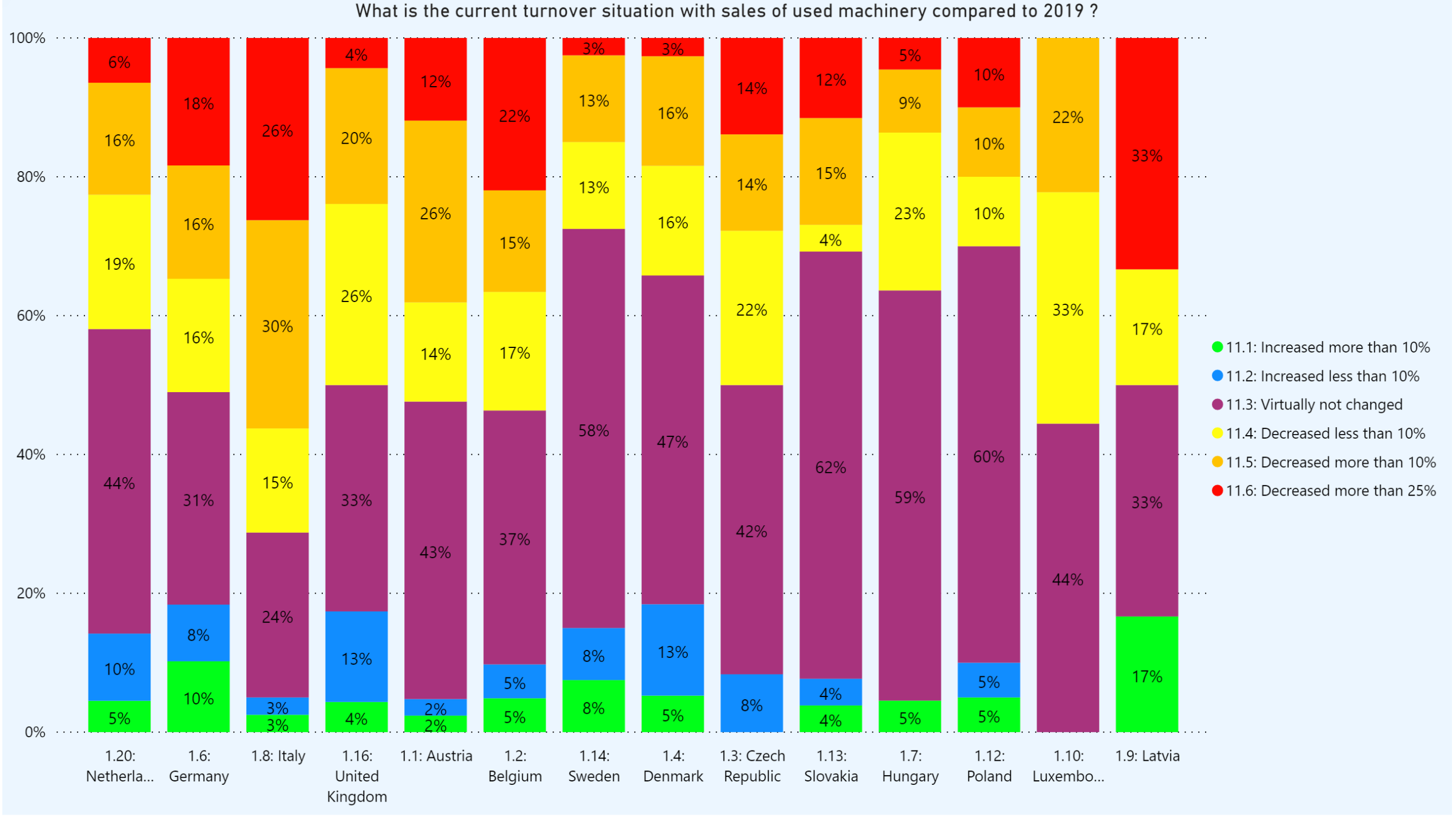

Has your turnover and order book already been affected compared to 2019?
100%
80%
60%
40%
20%
0%
1.20: Netherlan...
1.6: Germany
1.8: Italy
1.16: United Kingdom
1.1: Austria
1.2: Belgium
1.14: Sweden
1.4: Denmark
1.3: Czech Republic
1.13: Slovakia
1.7: Hungary
1.12: Poland
1.10: Luxembo...
1.9: Latvia
6.1: Increased more than 10%
6.2: Increased less than 10%
6.3: Virtually not changed
6.4: Decreased less than 10%
6.5: Decreased more than 10%
6.6: Decreased more than 25%

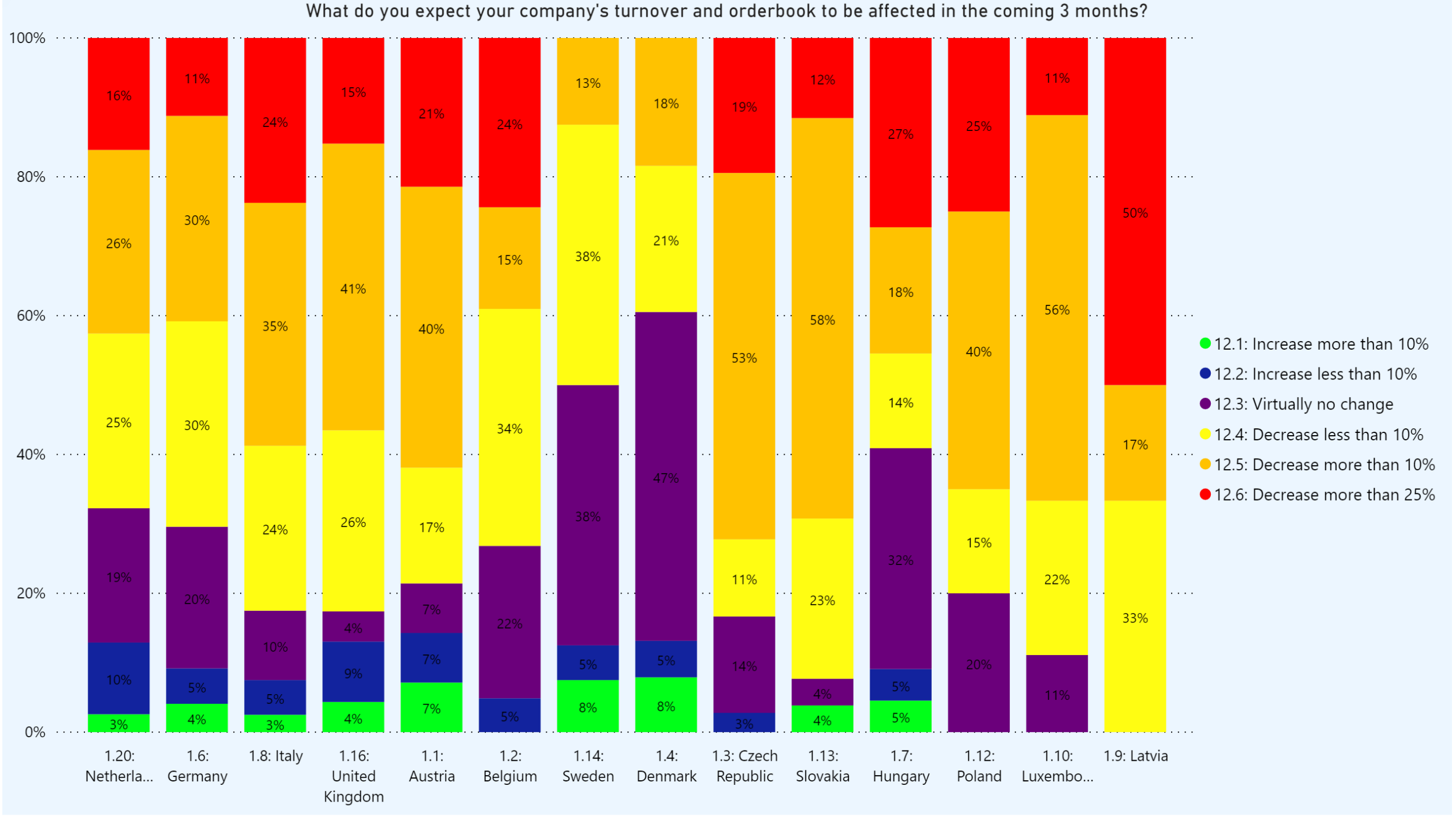

In which part of your company do your experience the most impact of the COVID-19 Crisis ?
100%
80%
60%
40%
20%
0%
1.20: Netherla...
1.6: Germany
1.8: Italy
1.16: United Kingdom
1.1: Austria
1.2: Belgium
1.14: Sweden
1.4: Denmark
1.3: Czech Republic
1.13: Slovakia
1.7: Hungary
1.12: Poland
1.10: Luxemb...
1.9: Latvia
5%
67%
15%
14%
7%
72%
13%
12%
10%
83%
6%
7%
70%
7%
17%
7%
79%
5%
10%
5%
71%
12%
12%
5%
65%
28%
3%
8%
63%
21%
8%
3%
89%
8%
3%
4%
81%
15%
9%
82%
5%
5%
10%
85%
5%
89%
11%
67%
33%
7.1: Repair & Maintenance workshop
7.2: Components & Parts shop
7.3: Sales Department
7.4: Administration Office

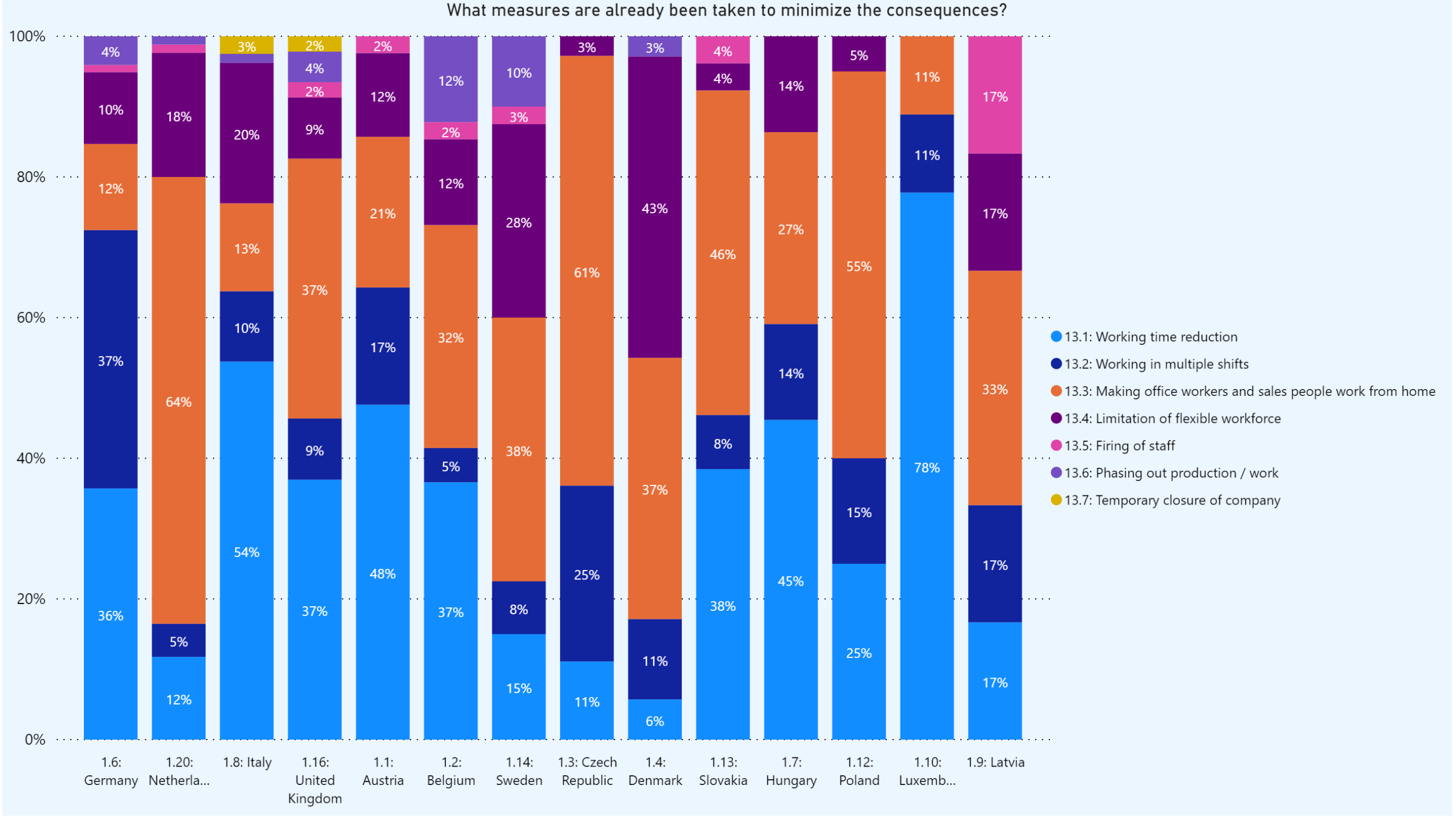

What is the current turnover situation in the Repair&Maintenance Workshop compared to 2019 ?
100%
80%
60%
40%
20%
0%
1.20: Netherla...
1.6: Germany
1.8: Italy
1.16: United Kingdom
1.1: Austria
1.2: Belgium
1.14: Sweden
1.4: Denmark
1.3: Czech Republic
1.13: Slovakia
1.7: Hungary
1.12: Poland
1.10: Luxembo...
1.9: Latvia
6%
10%
15%
52%
11%
4%
12%
20%
39%
11%
13%
11%
16%
25%
31%
9%
8%
22%
13%
11%
24%
20%
11%
14%
17%
19%
33%
7%
10%
5%
22%
17%
46%
7%
2%
8%
8%
55%
23%
8%
11%
71%
13%
5%
3%
14%
22%
50%
6%
6%
8%
15%
15%
58%
4%
5%
18%
14%
55%
5%
5%
5%
10%
20%
50%
5%
10%
11%
56%
33%
33%
33%
17%
17%
8.1: Increased more than 10%
8.2: Increased less than 10%
8.3: Virtually not changed
8.4: Decreased less than 10%
8.5: Decreased more than 10%
8.6: Decreased more than 25%

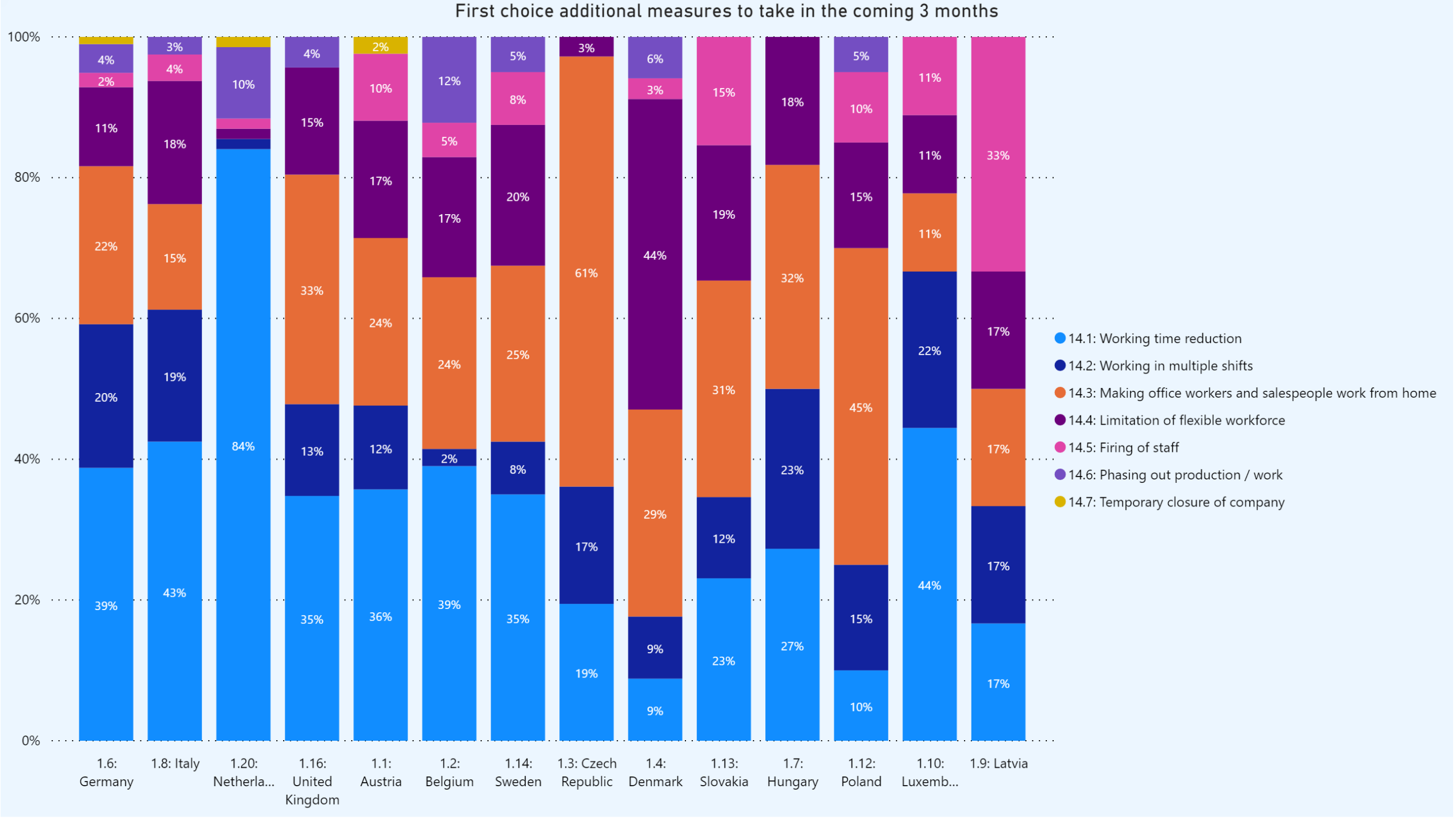

What is the current turnover situation in the Component &Parts shop compared to 2019 ?
100%
80%
60%
40%
20%
0%
1.20: Netherla...
1.6: Germany
1.8: Italy
1.16: United Kingdom
1.1: Austria
1.2: Belgium
1.14: Sweden
1.4: Denmark
1.3: Czech Republic
1.13: Slovakia
1.7: Hungary
1.12: Poland
1.10: Luxembo...
1.9: Latvia
9.1: Increased more than 10%
9.2: Increased less than 10%
9.3: Virtually not changed
9.4: Decreased less than 10%
9.5: Decreased more than 10%
9.6: Decreased more than 25%

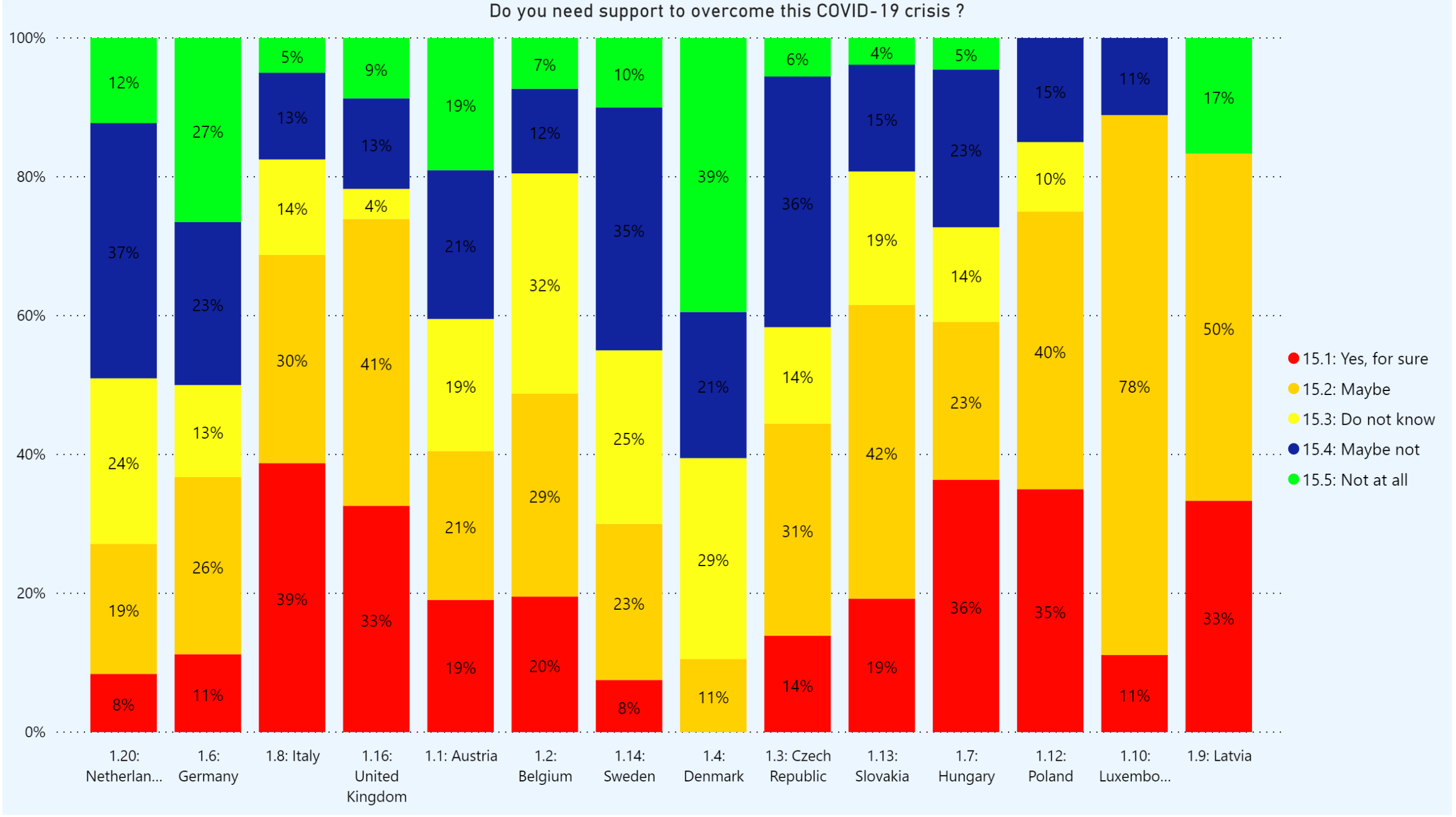

What is the current turnover and orderbook situation with sales of new machinery compared to 2019?
100%
80%
60%
40%
20%
0%
1.20: Netherla...
1.6: Germany
1.8: Italy
1.16: United Kingdom
1.1: Austria
1.2: Belgium
1.14: Sweden
1.4: Denmark
1.3: Czech Republic
1.13: Slovakia
1.7: Hungary
1.12: Poland
1.10: Luxembo...
1.9: Latvia
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%

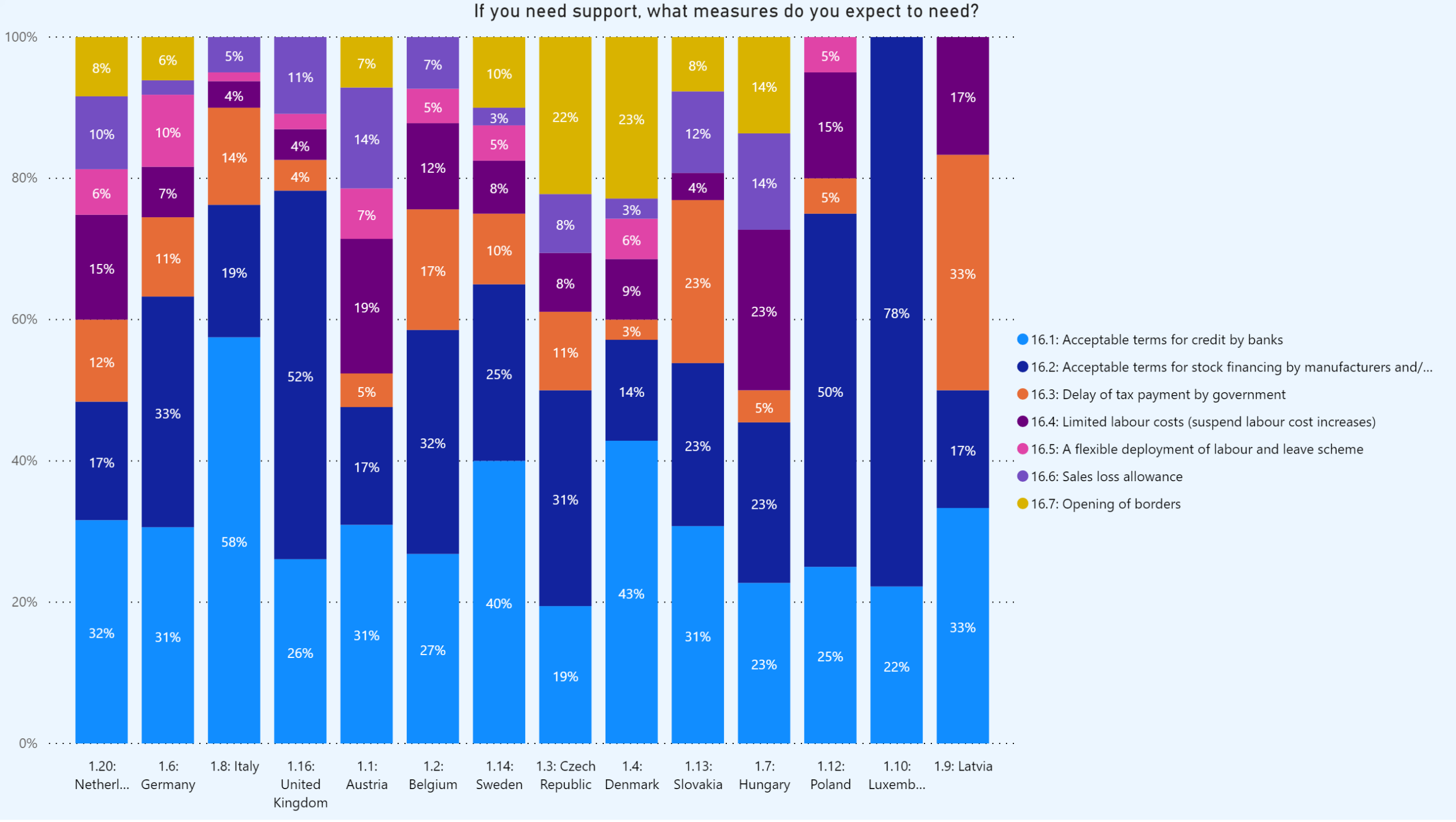

What is the current turnover situation with sales of used machinery compared to 2019 ?
100%
80%
60%
40%
20%
0%
1.20: Netherla...
1.6: Germany
1.8: Italy
1.16: United Kingdom
1.1: Austria
1.2: Belgium
1.14: Sweden
1.4: Denmark
1.3: Czech Republic
1.13: Slovakia
1.7: Hungary
1.12: Poland
1.10: Luxembo...
1.9: Latvia
11.1: Increased more than 10%
11.2: Increased less than 10%
11.3: Virtually not changed
11.4: Decreased less than 10%
11.5: Decreased more than 10%
11.6: Decreased more than 25%


What do you expect your company's turnover and orderbook to be affected in the coming 3 months?
100%
80%
60%
40%
20%
0%
16%
26%
25%
19%
10%
3%
11%
30%
30%
20%
5%
4%
24%
35%
24%
10%
5%
3%
15%
41%
26%
4%
9%
4%
21%
40%
17%
7%
7%
7%
24%
15%
34%
22%
5%
13%
38%
38%
5%
8%
18%
21%
47%
5%
8%
19%
53%
11%
14%
3%
12%
58%
23%
4%
4%
27%
18%
14%
32%
5%
5%
25%
40%
15%
20%
11%
56%
22%
11%
50%
17%
33%
1.20: Netherla...
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: Luxembo...
1.9: Latvia
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 taken to minimize the consequences?
100%
80%
60%
40%
20%
0%
1.6: Germany
1.20: Netherla...
1.8: Italy
1.16: United Kingdom
1.1: Austria
1.2: Belgium
1.14: Sweden
1.3: Czech Republic
1.4: Denmark
1.13: Slovakia
1.7: Hungary
1.12: Poland
1.10: Luxemb...
1.9: Latvia
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


First choice additional measures to take in the coming 3 months
100%
80%
60%
40%
20%
0%
1.6: Germany
39%
20%
22%
11%
2%
4%
1.8: Italy
43%
19%
15%
18%
4%
3%
1.20: Netherla...
84%
10%
1.16: United Kingdom
35%
13%
33%
15%
4%
1.1: Austria
36%
12%
24%
17%
10%
2%
1.2: Belgium
39%
2%
24%
17%
5%
12%
1.14: Sweden
35%
8%
25%
20%
8%
5%
1.3: Czech Republic
19%
17%
61%
3%
1.4: Denmark
9%
9%
29%
44%
3%
6%
1.13: Slovakia
23%
12%
31%
19%
15%
1.7: Hungary
27%
23%
32%
18%
1.12: Poland
10%
15%
45%
15%
10%
5%
1.10: Luxemb...
44%
22%
11%
11%
11%
1.9: Latvia
17%
17%
17%
17%
33%
14.1: Working time reduction
14.2: Working in multiple shifts
14.3: Making office workers and salespeople work from home
14.4: Limitation of flexible workforce
14.5: Firing of staff
14.6: Phasing out production / work
14.7: Temporary closure of company

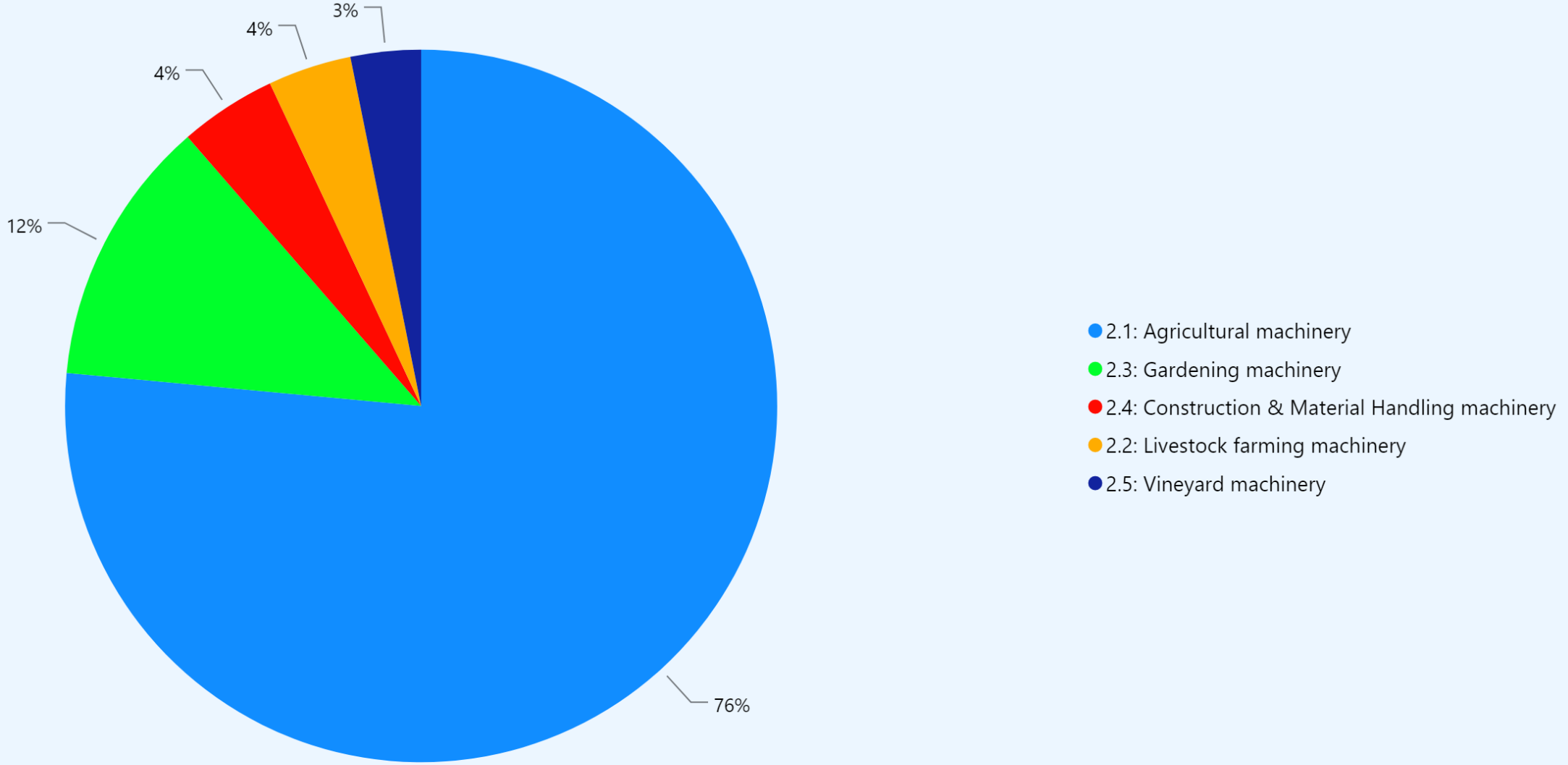

Do you need support to overcome this COVID-19 crisis ?
100%
80%
60%
40%
20%
0%
12%
37%
24%
19%
8%
27%
23%
13%
26%
11%
5%
13%
14%
30%
39%
9%
13%
4%
41%
33%
19%
21%
19%
21%
19%
7%
12%
32%
29%
20%
10%
35%
25%
23%
8%
39%
21%
29%
11%
6%
36%
14%
31%
14%
4%
15%
19%
42%
19%
5%
23%
14%
23%
36%
15%
10%
40%
35%
11%
78%
11%
17%
50%
33%
1.20: Netherlan...
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: Luxembo...
1.9: Latvia
15.1: Yes, for sure
15.2: Maybe
15.3: Do not know
15.4: Maybe not
15.5: Not at all


If you need support, what measures do you expect to need?
100%
80%
60%
40%
20%
0%
1.20: Netherl...
1.6: Germany
1.8: Italy
1.16: United Kingdom
1.1: Austria
1.2: Belgium
1.14: Sweden
1.3: Czech Republic
1.4: Denmark
1.13: Slovakia
1.7: Hungary
1.12: Poland
1.10: Luxemb...
1.9: Latvia
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

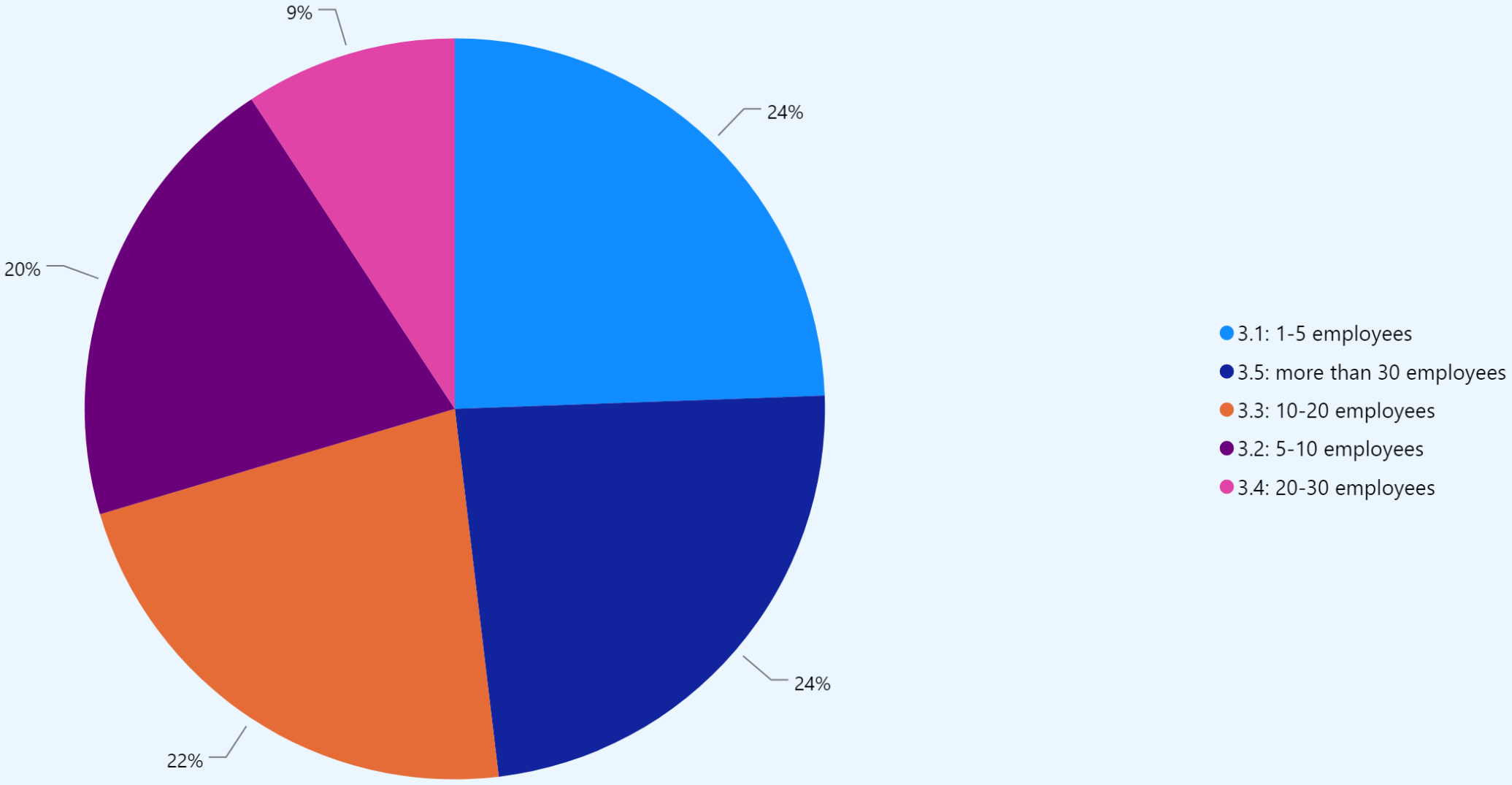
CLIMMAR COVID-19 SURVEY

PART 2: Compiled results of all participating countries

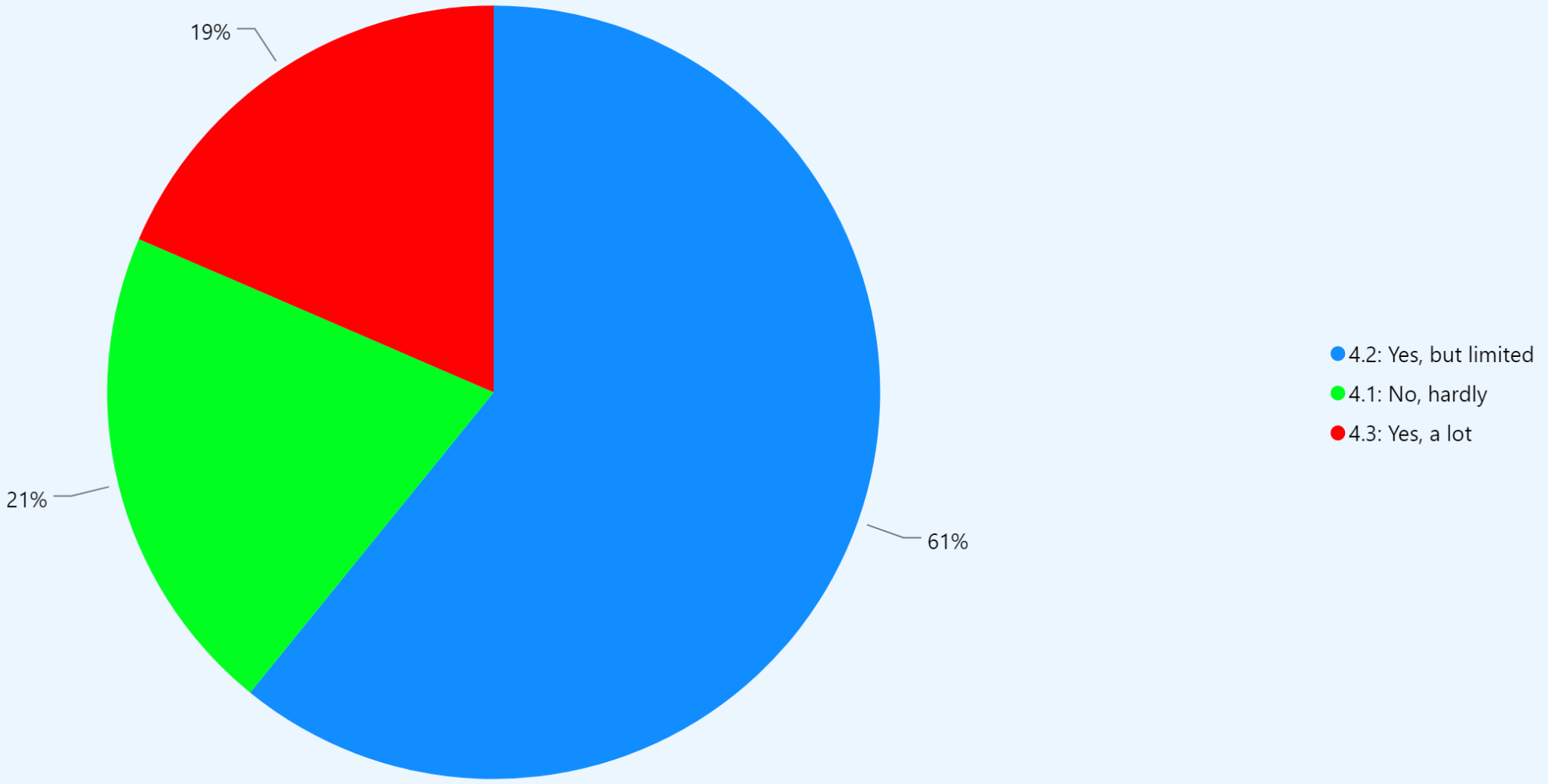
In which segment are your main activities ?



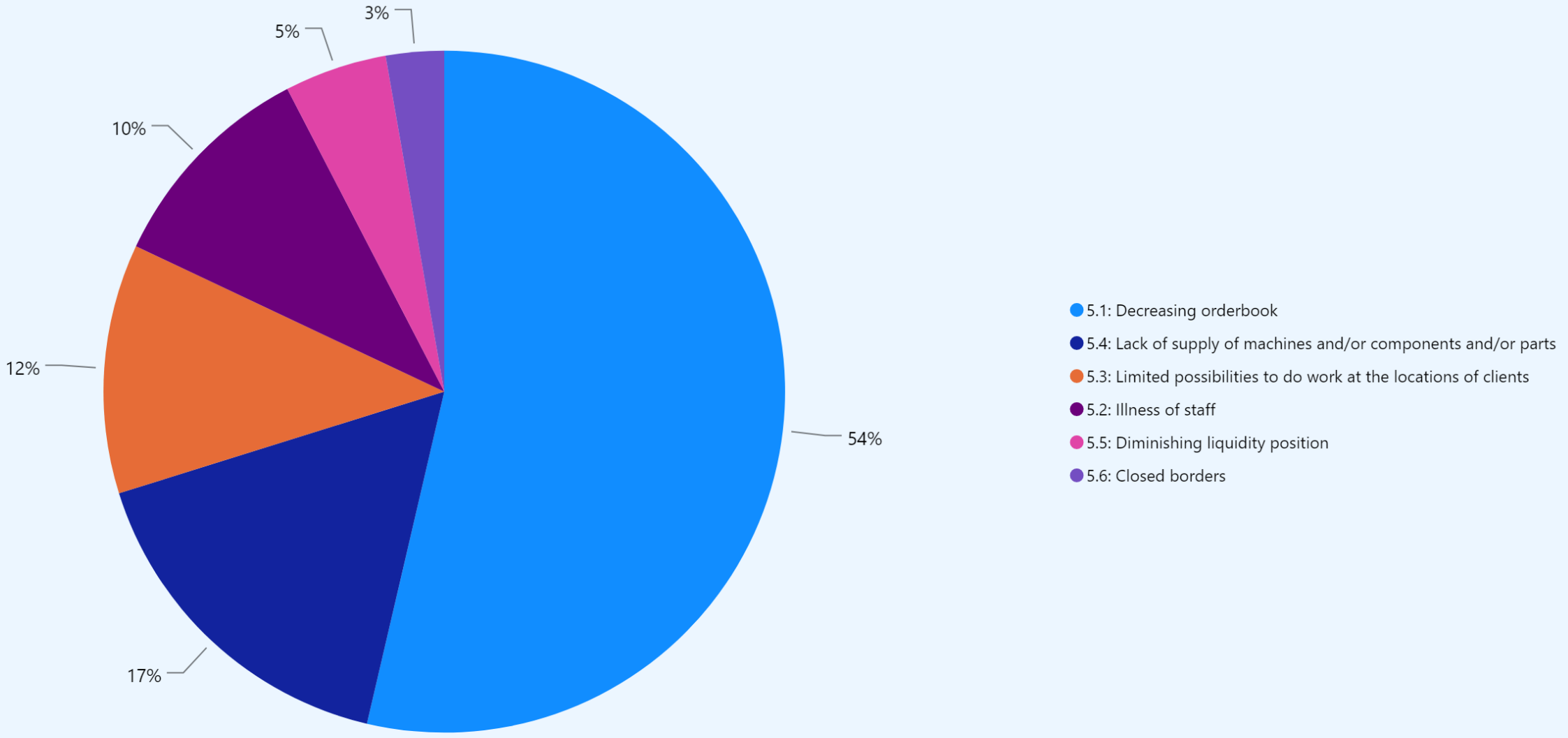
How many employees do you have (full time) ?



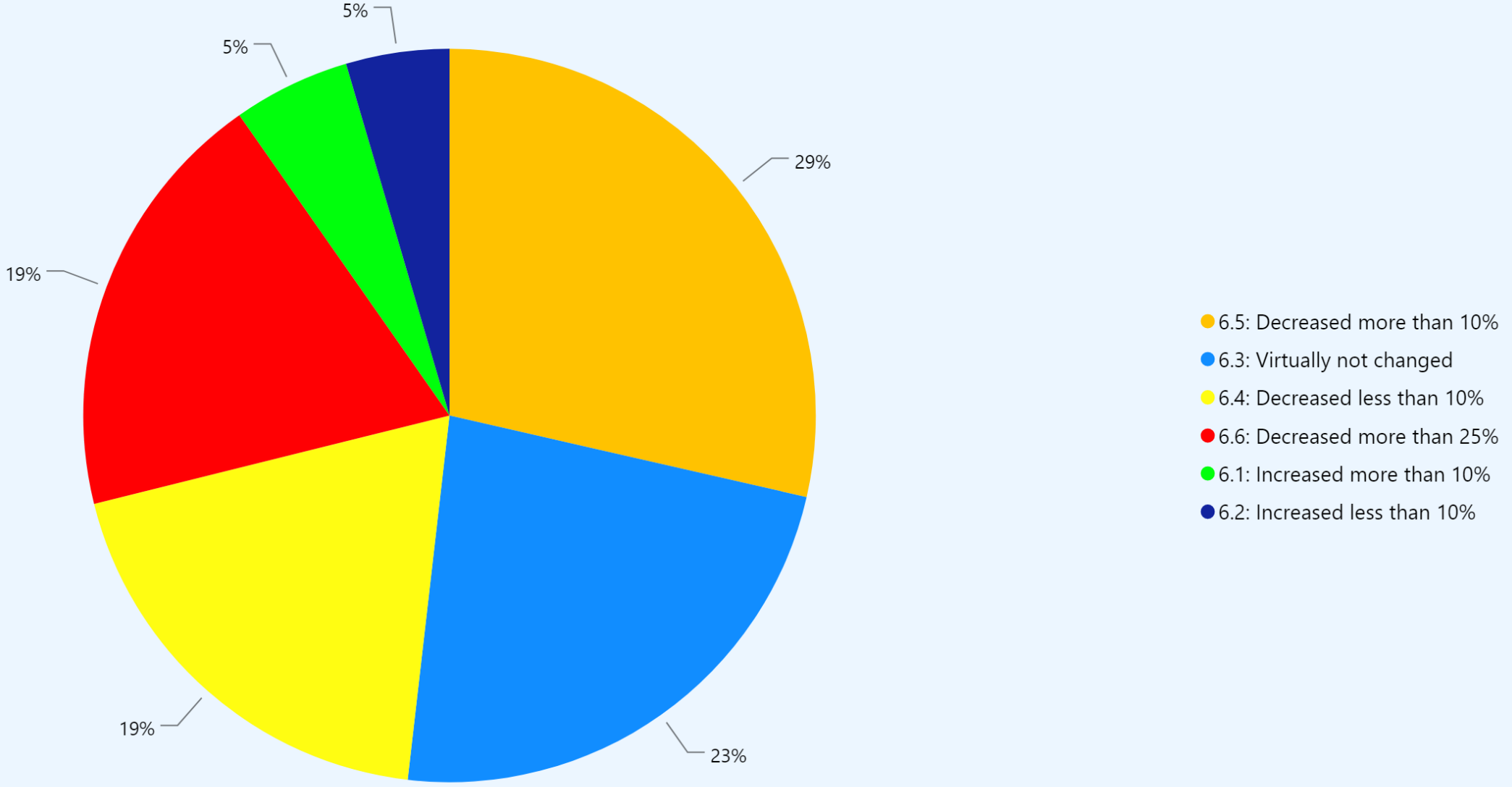
Are you currently experiencing consequences due to the COVID-19 crisis?



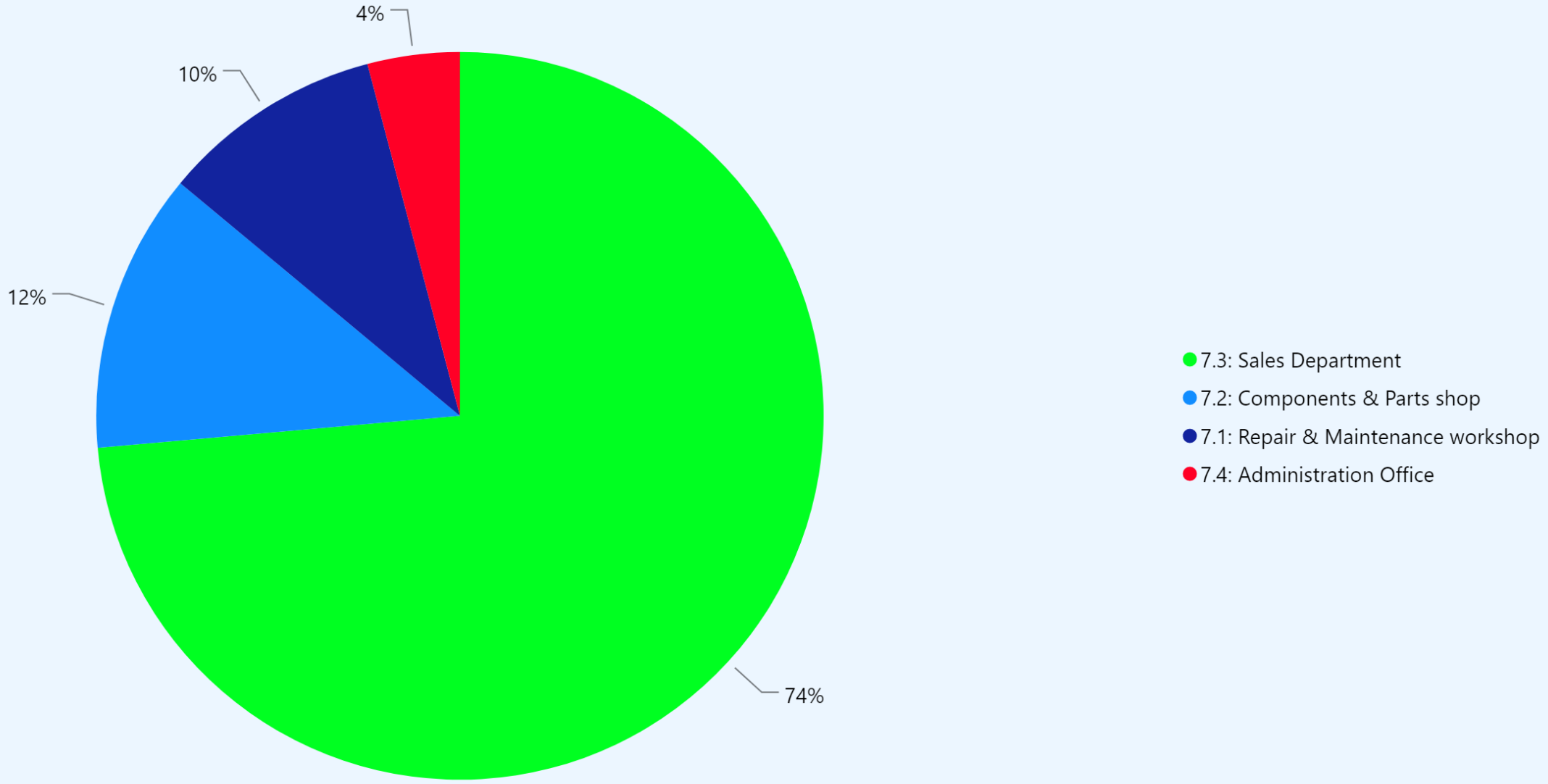
Main consequences for you company today



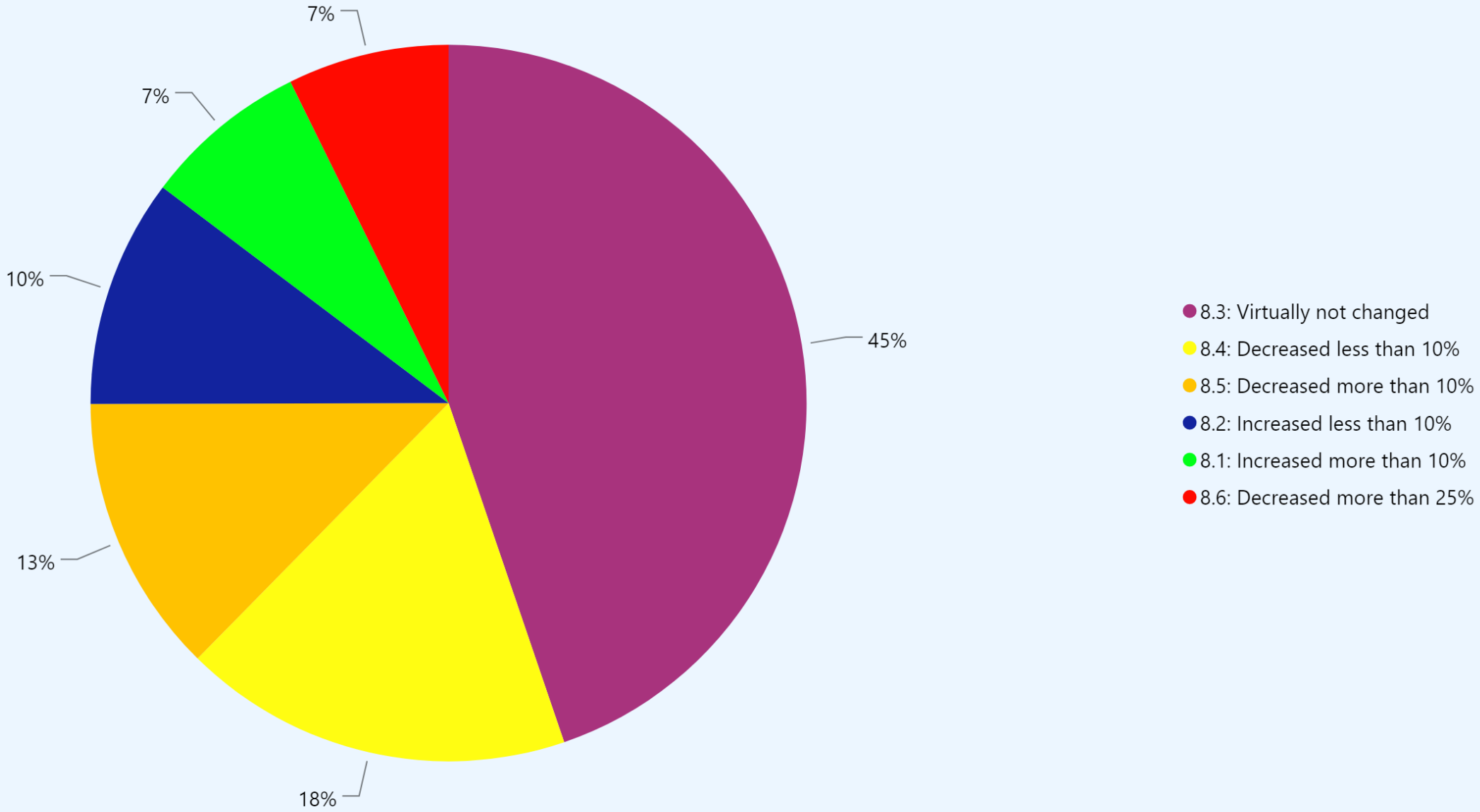
Has your turnover and order book already been affected compared to 2019?



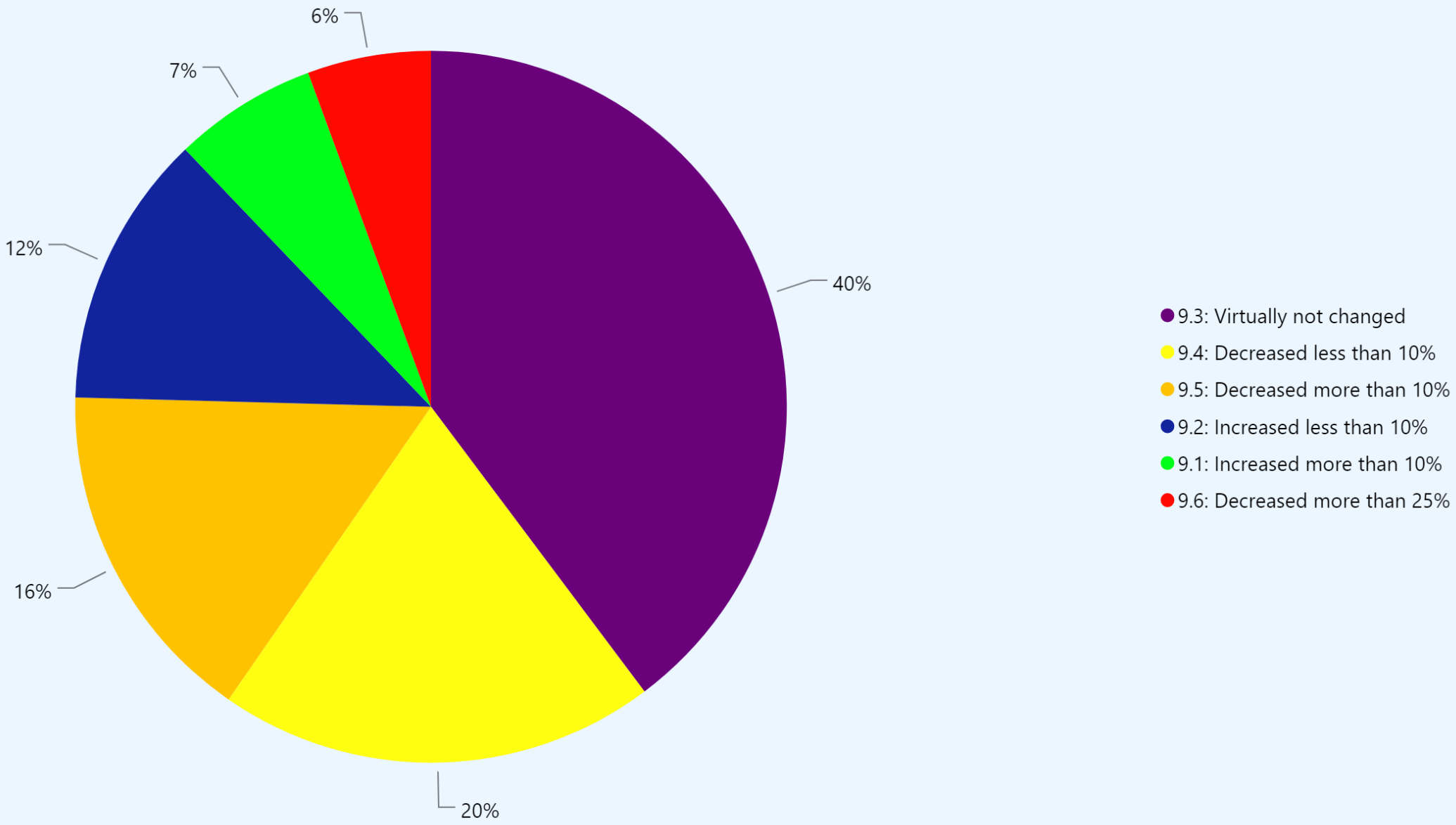
In which part of your company do your experience the most impact of the COVID-19 Crisis ?



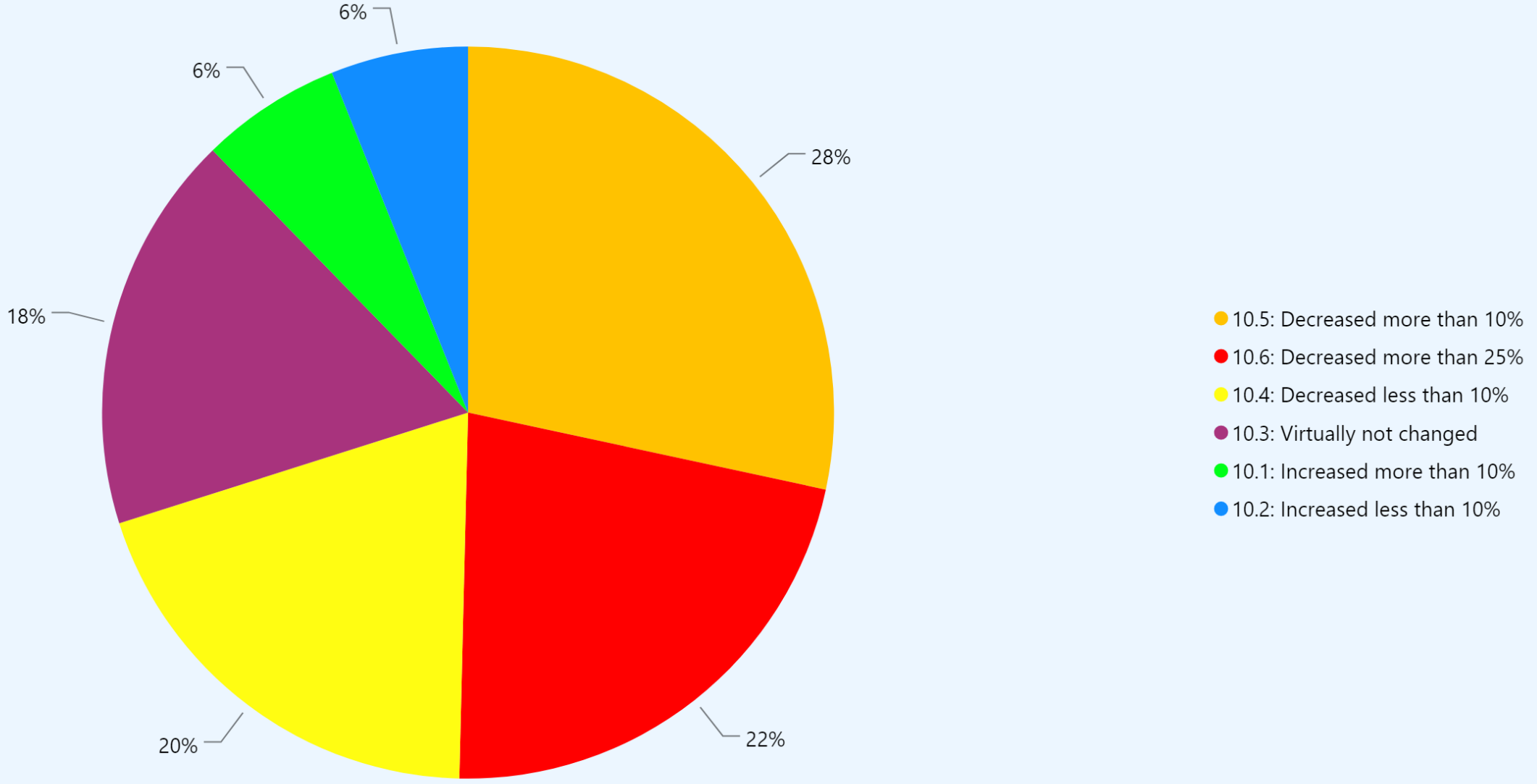
What is the current turnover situation in the Repair&Maintenance Workshop compared to 2019 ?



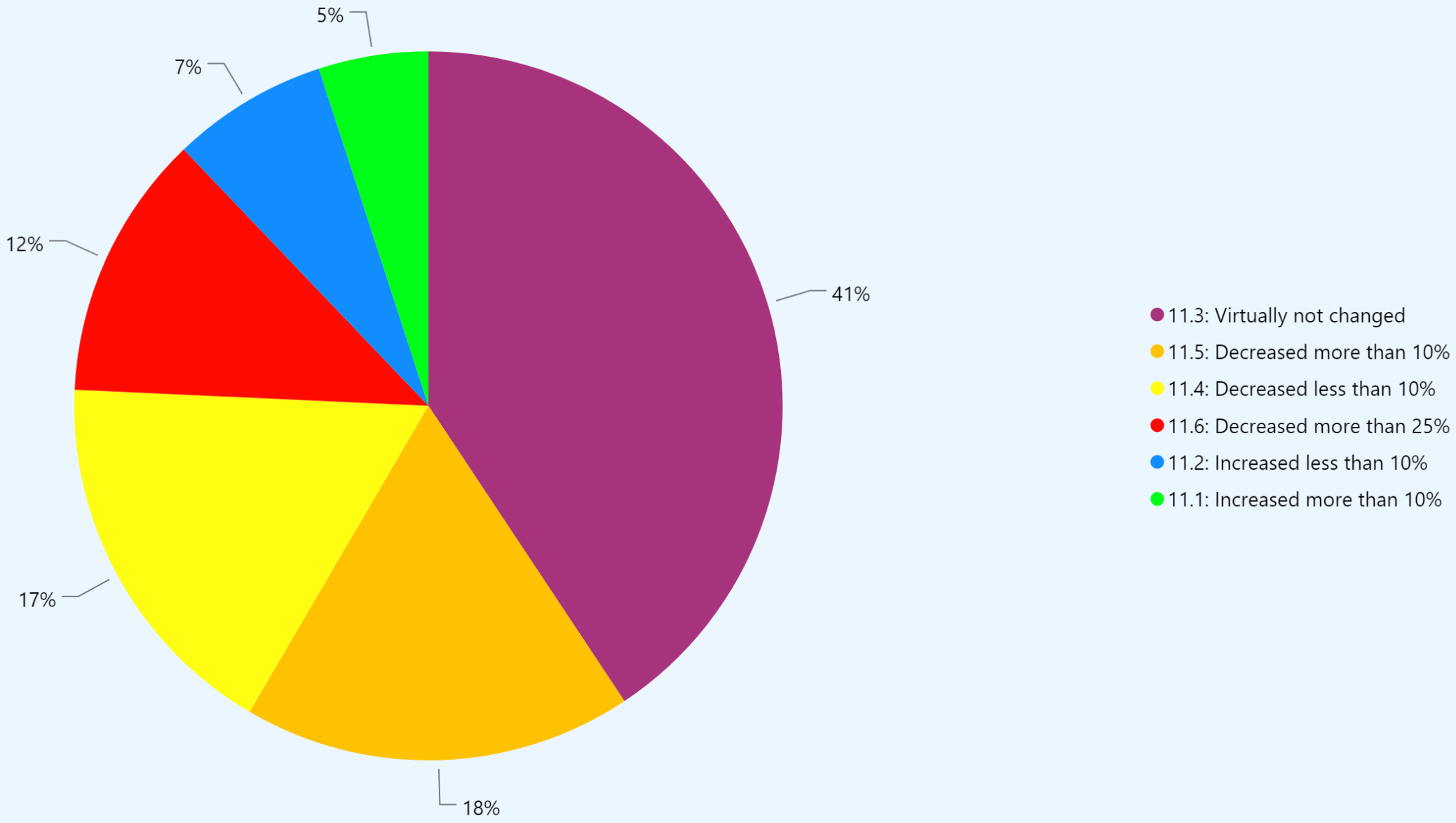
What is the current turnover situation in the Component &Parts shop compared to 2019 ?



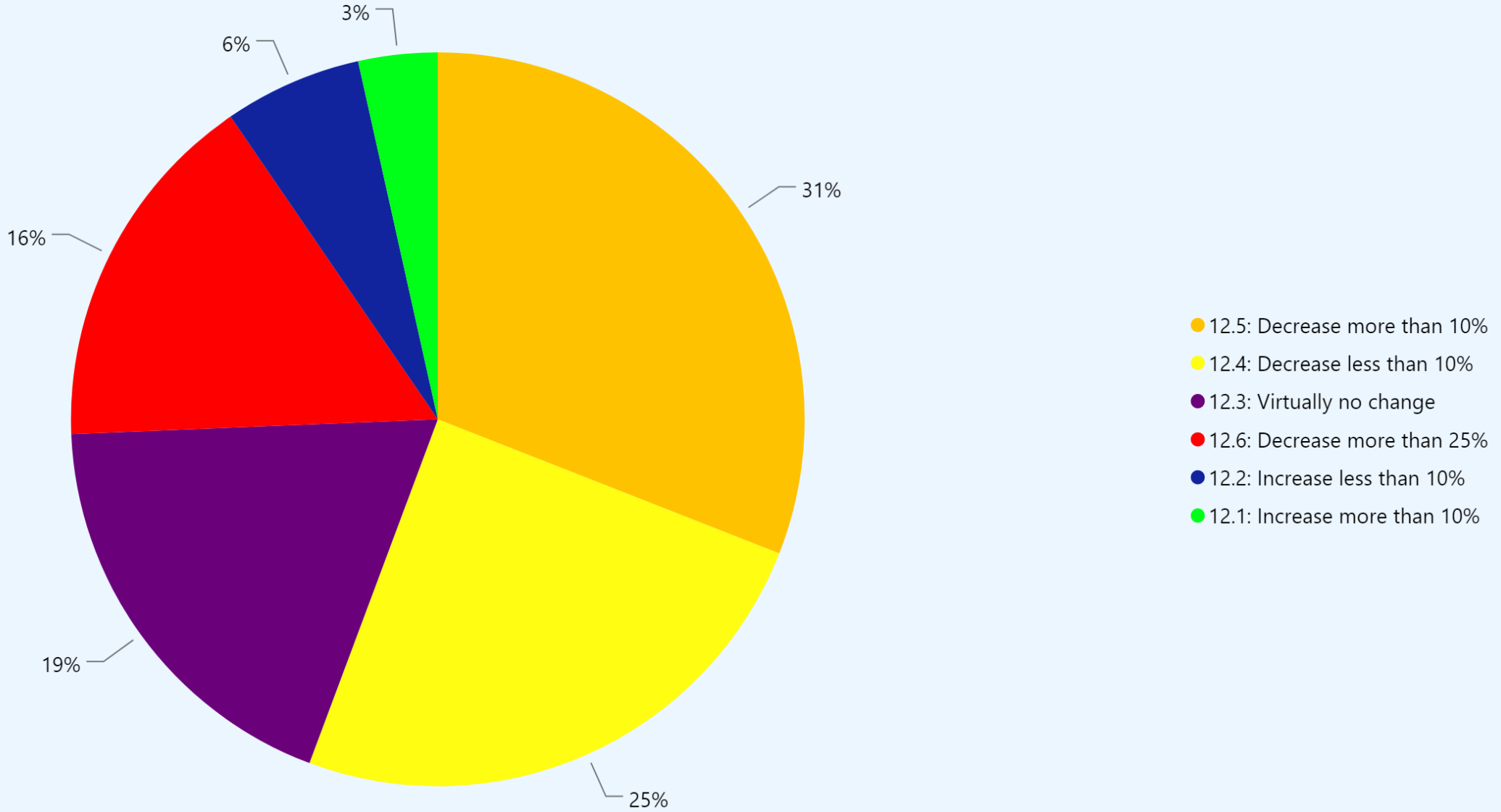
What is the current turnover and orderbook situation with sales of new machinery compared to 2019?

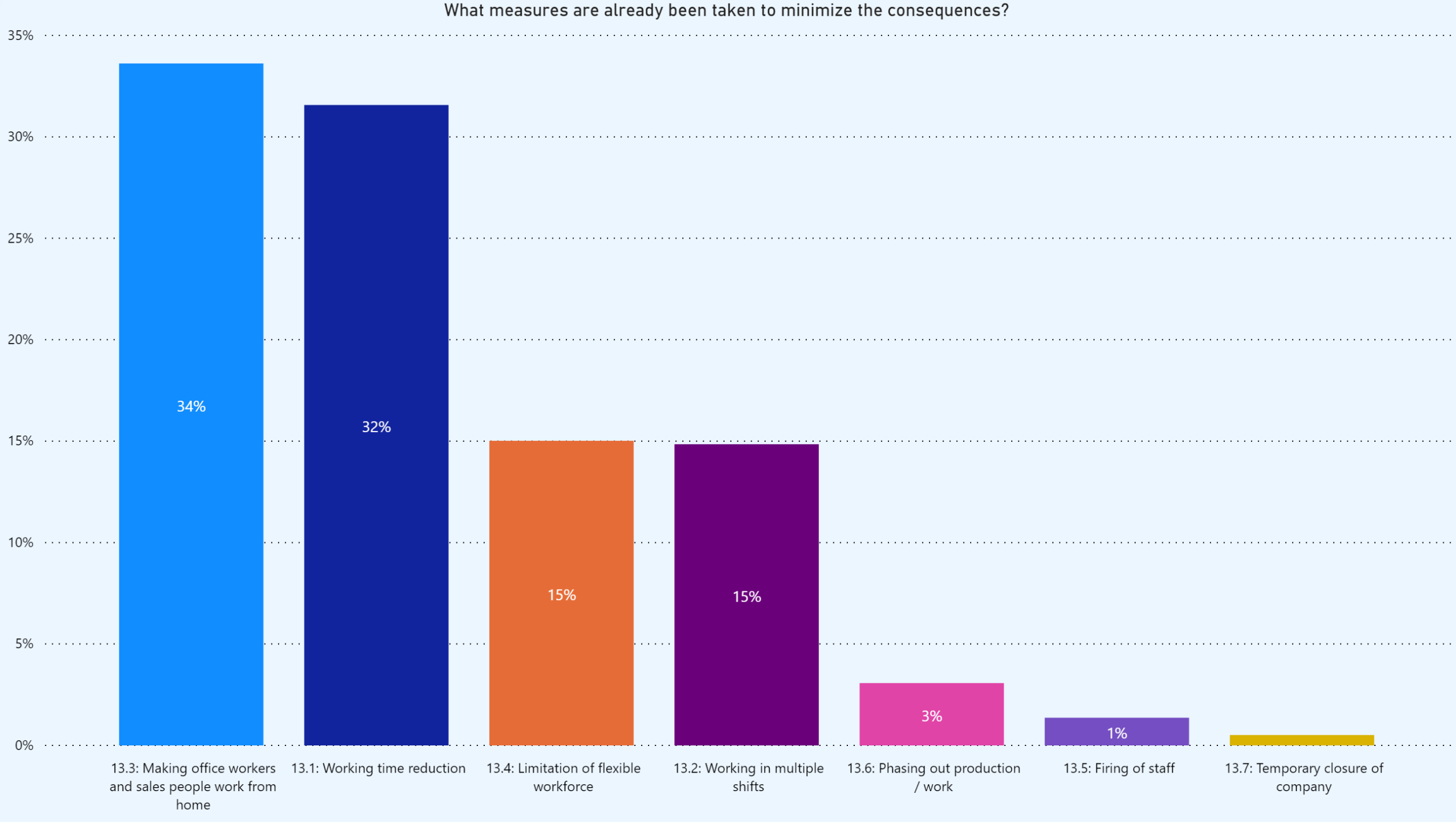


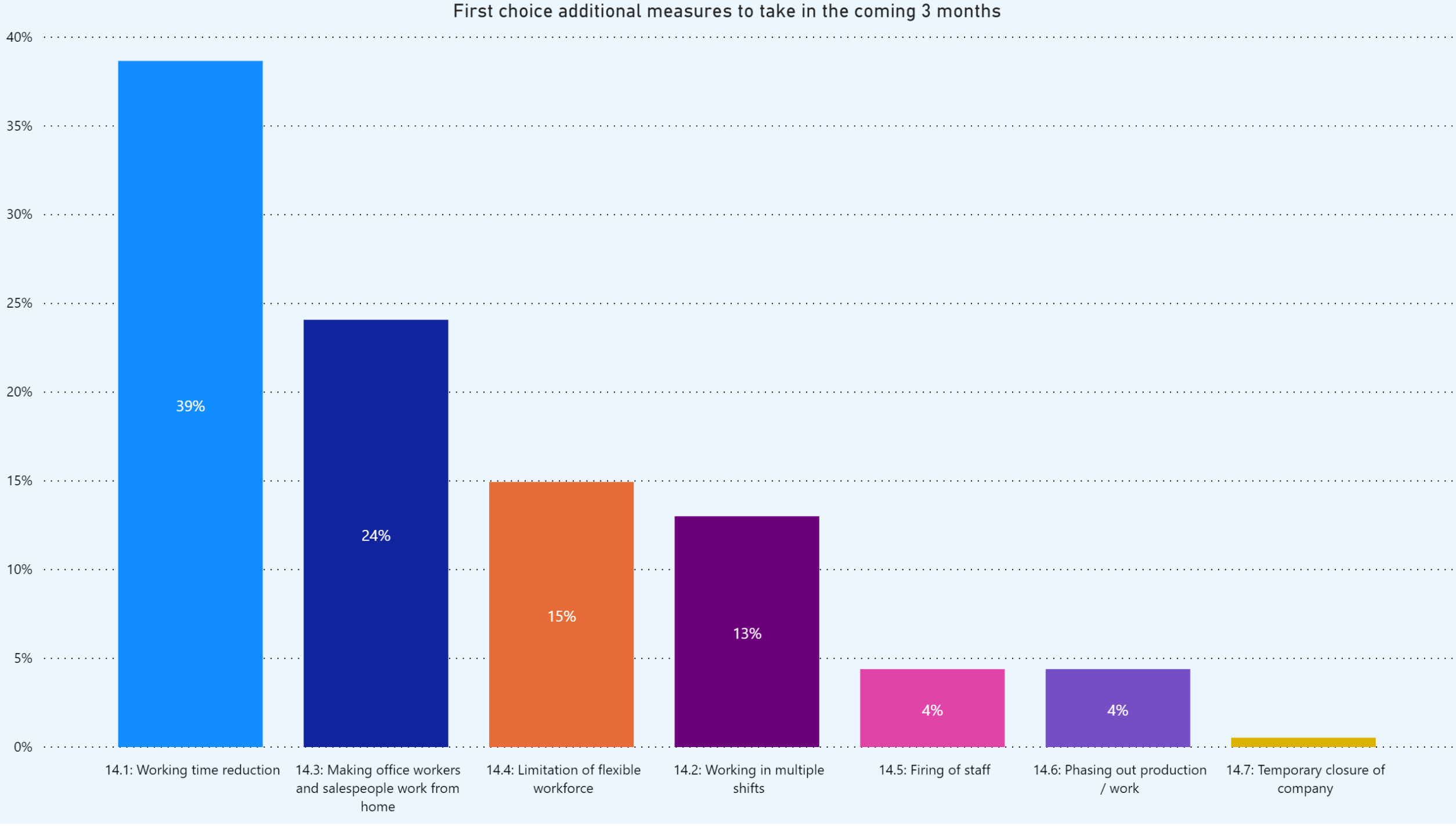
What is the current turnover situation with sales of used machinery compared to 2019 ?



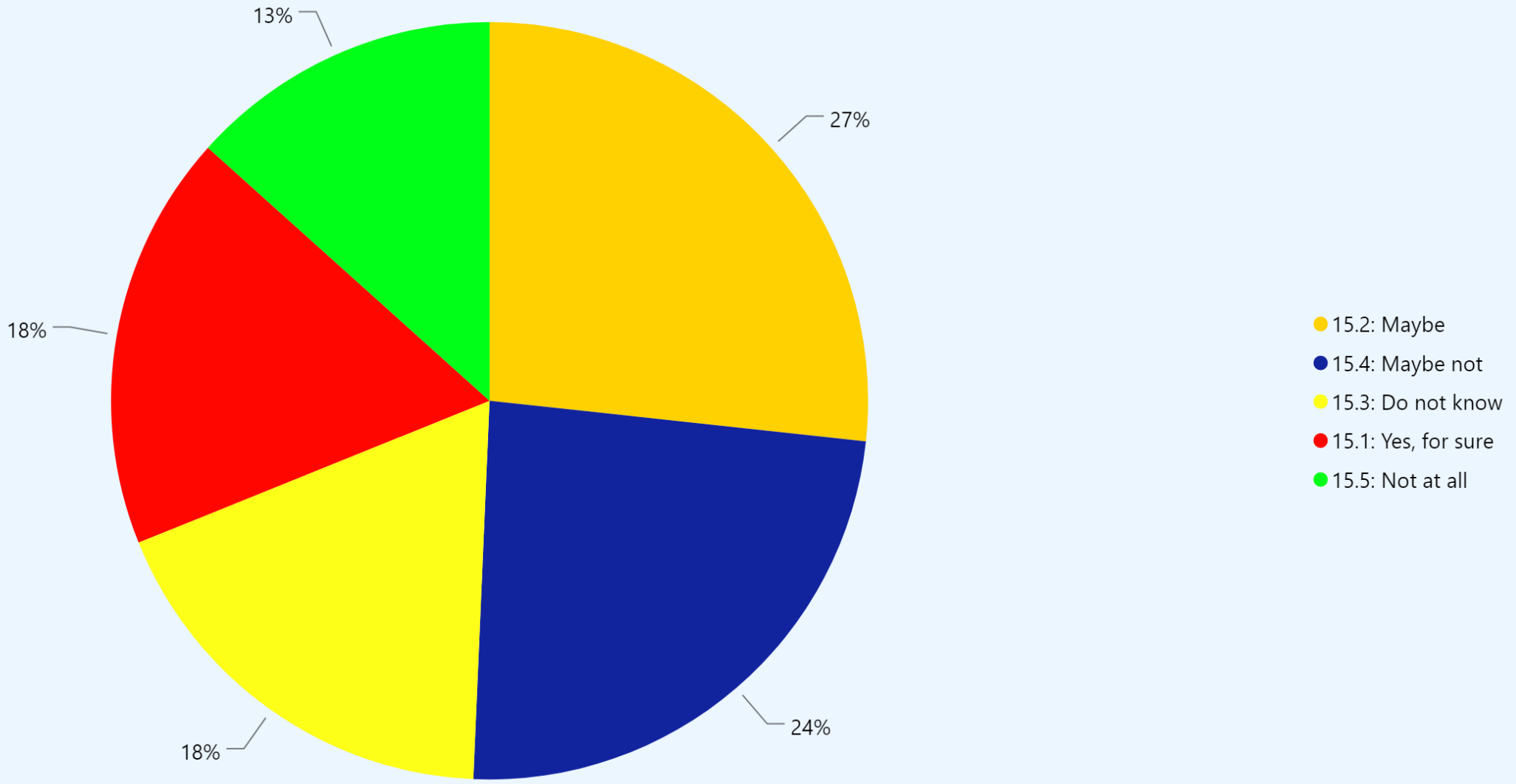
What do you expect your company's turnover and orderbook to be affected in the coming 3 months?

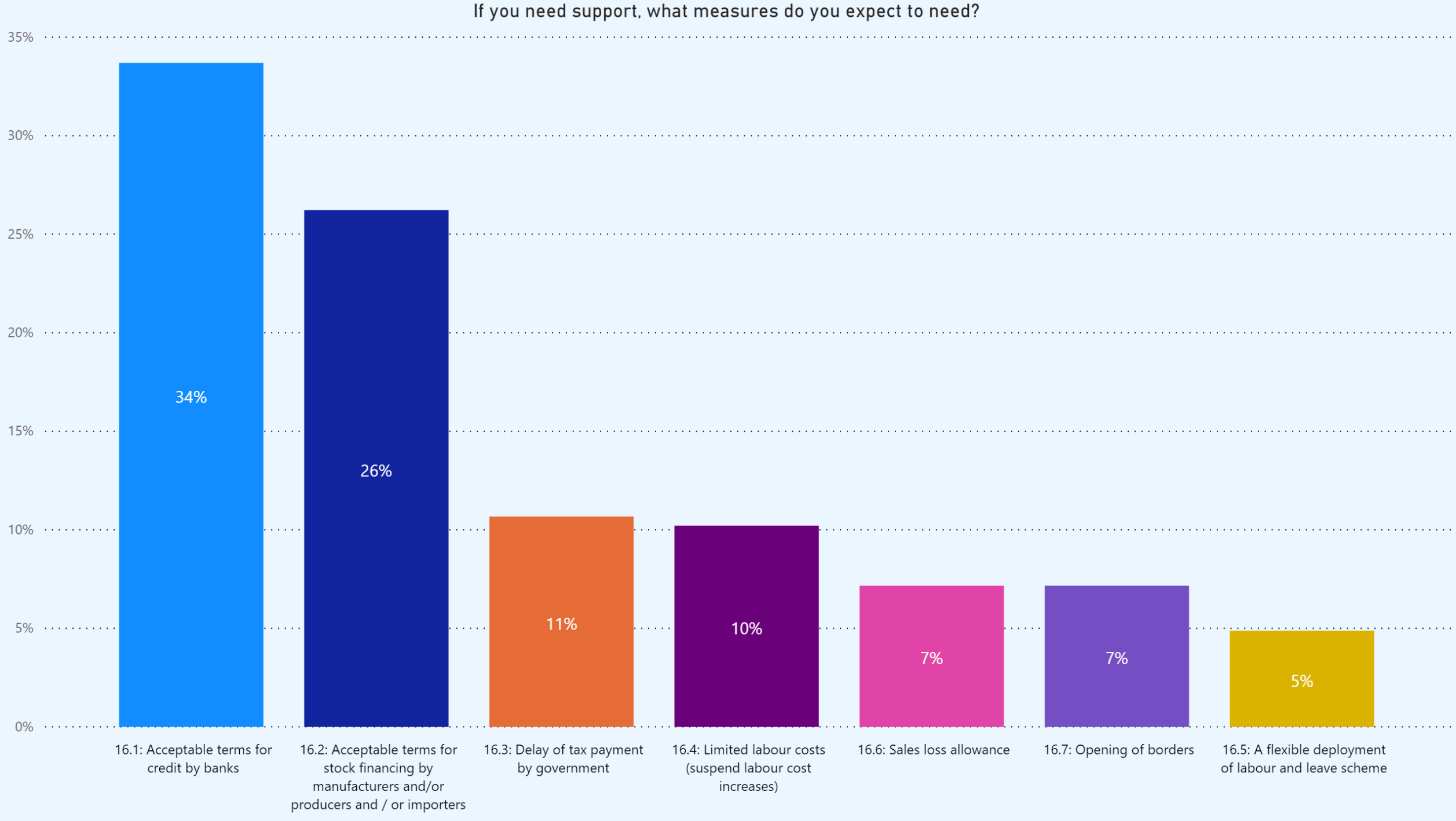



What measures are already been taken to minimize the consequences?
35%
30%
25%
20%
15%
10%
5%
0%
34%
32%
15%
15%
3%
1%
13.3: Making office workers and sales people work from home
13.1: Working time reduction
13.4: Limitation of flexible workforce
13.2: Working in multiple shifts
13.6: Phasing out production / work
13.5: Firing of staff
13.7: Temporary closure of company


First choice additional measures to take in the coming 3 months
40%
35%
30%
25%
20%
15%
10%
5%
0%
39%
24%
15%
13%
4%
4%
14.1: Working time reduction
14.3: Making office workers and salespeople work from home
14.4: Limitation of flexible workforce
14.2: Working in multiple shifts
14.5: Firing of staff
14.6: Phasing out production / work
14.7: Temporary closure of company

Do you need support to overcome this COVID-19 crisis ?




If you need support, what measures do you expect to need?
35%
30%
25%
20%
15%
10%
5%
0%
34%
26%
11%
10%
7%
7%
5%
16.1: Acceptable terms for credit by banks
16.2: Acceptable terms for stock financing by manufacturers and/or producers and / or importers
16.3: Delay of tax payment by government
16.4: Limited labour costs (suspend labour cost increases)
16.6: Sales loss allowance
16.7: Opening of borders
16.5: A flexible deployment of labour and leave scheme