

EFC Weekly Pulse - Customer Supply / Demand - RESULTS - July 17th



Please find the latest comparison data on the weekly supply and demand pulse. This poll is meant to be a snapshot of the industry at that point in time.

All EFC Manufacturers and Distributors are invited to provide input, however we are not closely tracking which companies are responding each week, thus the results will fluctuate based on that week's make up.

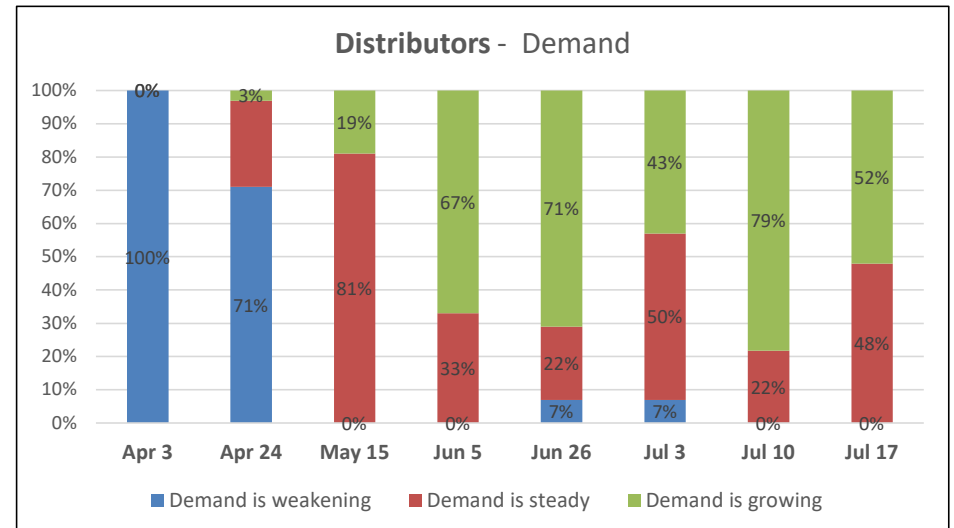
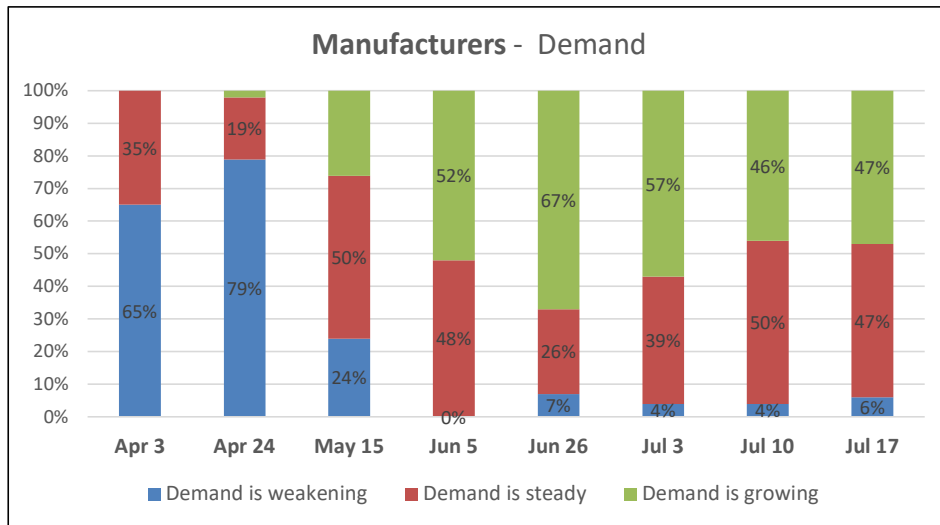
EFC will continue to monitor the status of our industry for the weeks to come. We encourage you to continue to provide input. THANK YOU !

MANUFACTURERS	Apr 3	Apr 24	May 15	Jun 5	Jun 26	Jul 3	Jul 10	Jul 17
Demand is weakening	65%	79%	24%	0%	7%	4%	4%	6%
Demand is steady	35%	19%	50%	48%	26%	39%	50%	47%
Demand is growing	0%	2%	26%	52%	67%	57%	46%	47%

Change from Prev
2%
-3%
1%

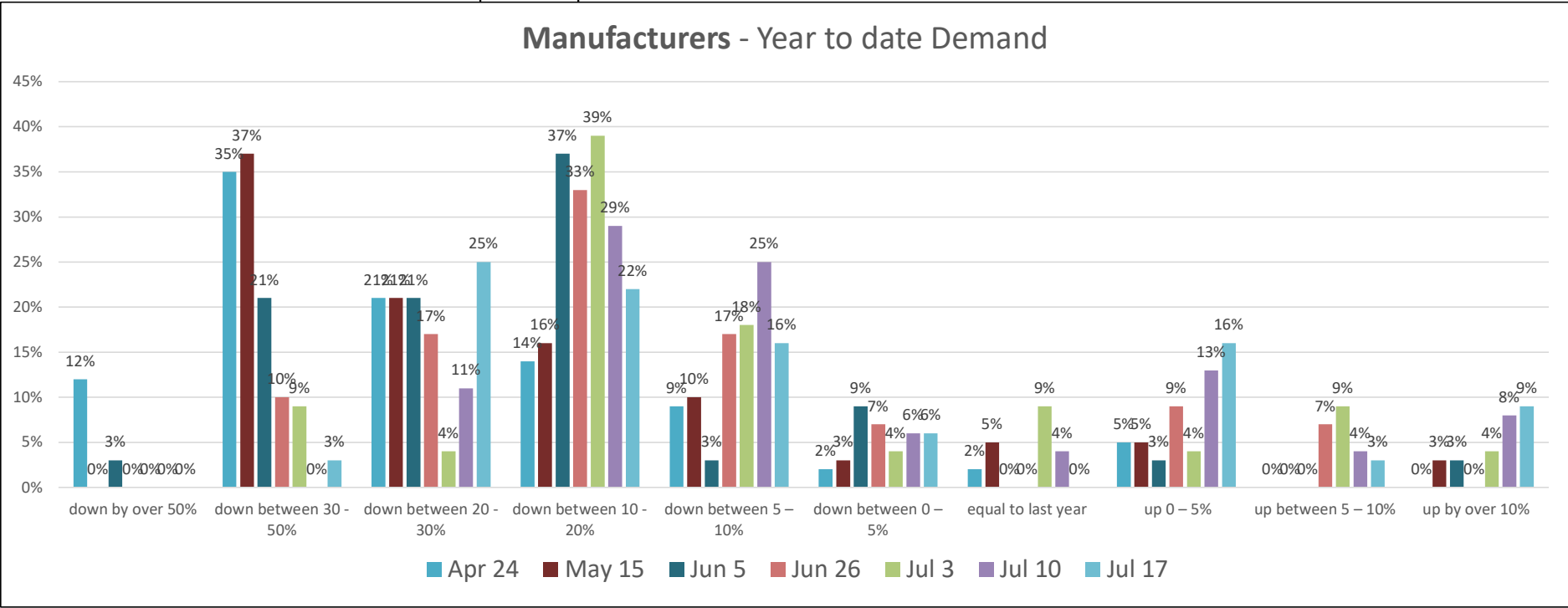
DISTRIBUTORS	Apr 3	Apr 24	May 15	Jun 5	Jun 26	Jul 3	Jul 10	Jul 17
Demand is weakening	100%	71%	0%	0%	7%	7%	0%	0%
Demand is steady	0%	26%	81%	33%	22%	50%	22%	48%
Demand is growing	0%	3%	19%	67%	71%	43%	79%	52%

Change from Prev
0%
26%
-27%



Q2. Please indicate the status of DEMAND as it relates to your business on a YTD basis:

MANUFACTURERS	Apr 3	Apr 24	May 15	Jun 5	Jun 26	Jul 3	Jul 10	Jul 17
down by over 50%		12%	0%	3%	0%	0%	0%	0%
down between 30 - 50%		35%	37%	21%	10%	9%	0%	3%
down between 20 - 30%		21%	21%	21%	17%	4%	11%	25%
down between 10 - 20%		14%	16%	37%	33%	39%	29%	22%
ST down by over 10%	31%	82%	74%	82%	60%	52%	40%	50%
down between 5 – 10%	20%	9%	10%	3%	17%	18%	25%	16%
down between 0 – 5%	3%	2%	3%	9%	7%	4%	6%	6%
equal to last year	17%	2%	5%	0%	0%	9%	4%	0%
up 0 – 5%	11%	5%	5%	3%	9%	4%	13%	16%
up between 5 – 10%	9%	0%	0%	0%	7%	9%	4%	3%
up by over 10%	9%	0%	3%	3%	0%	4%	8%	9%



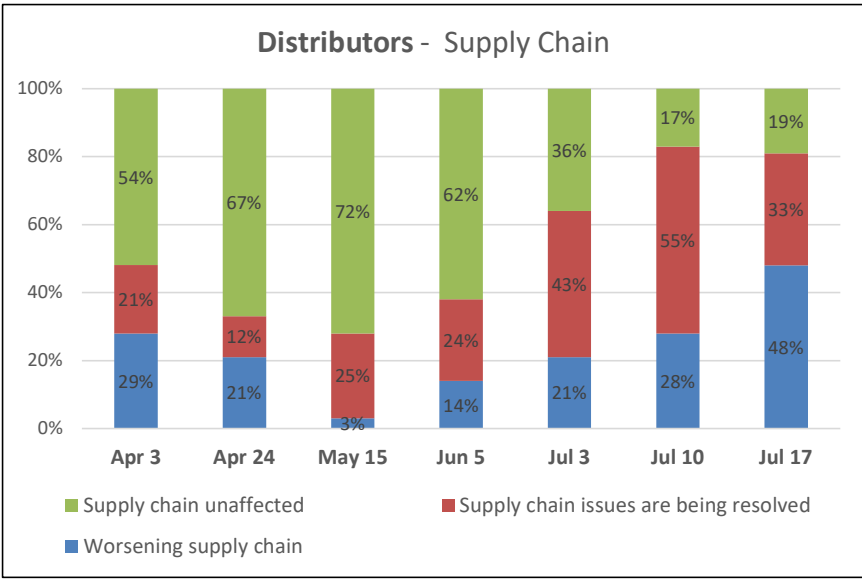
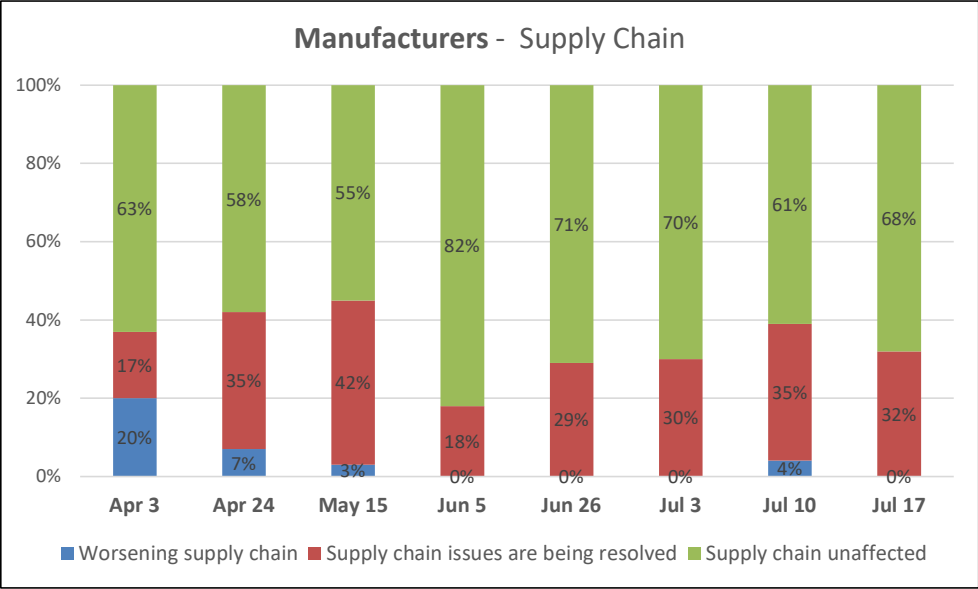
Q3. Please check the box that describes the status of the supply chain for your products/services:

MANUFACTURERS	Apr 3	Apr 24	May 15	Jun 5	Jun 26	Jul 3	Jul 10	Jul 17
Worsening supply chain	20%	7%	3%	0%	0%	0%	4%	0%
Supply chain issues are being resolved	17%	35%	42%	18%	29%	30%	35%	32%
Supply chain unaffected	63%	58%	55%	82%	71%	70%	61%	68%

Change from Prev
-4%
-3%
7%

DISTRIBUTORS	Apr 3	Apr 24	May 15	Jun 5	Jun 26	Jul 3	Jul 10	Jul 17
Worsening supply chain	29%	21%	3%	14%	18%	21%	28%	48%
Supply chain issues are being resolved	21%	12%	25%	24%	41%	43%	55%	33%
Supply chain unaffected	54%	67%	72%	62%	41%	36%	17%	19%

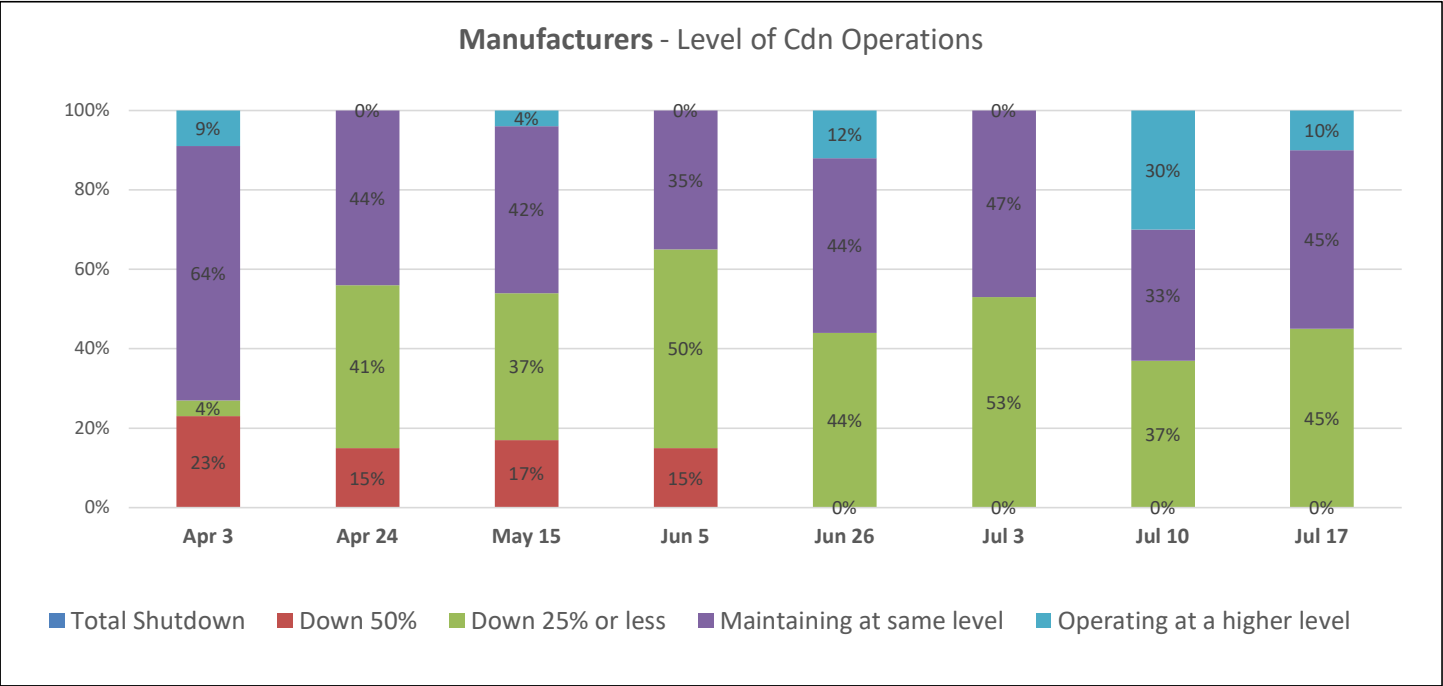
Change from Prev
20%
-22%
2%



Q4. If applicable, What level are you Canadian Operations at? (versus January & February average)

Results based on those with manufacturing facilities only

	Apr 3	Apr 24	May 15	Jun 5	Jun 26	Jul 3	Jul 10	Jul 17
Total Shutdown	0%	0%	0%	0%	0%	0%	0%	0%
Down 50%	23%	15%	17%	15%	0%	0%	0%	0%
Down 25% or less	4%	41%	37%	50%	44%	53%	37%	45%
Maintaining at same level	64%	44%	42%	35%	44%	47%	33%	45%
Operating at a higher level	9%	0%	4%	0%	12%	0%	30%	10%



Q5. Have you engaged in any layoffs since the beginning of MAY?

MANUFACTURERS	Apr 10	May 1	May 15	Jun 5	Jun 26	Jul 3	Jul 10	Jul 17
Yes	47%	33%	29%	45%	29%	35%	19%	31%
No	53%	67%	71%	55%	71%	65%	81%	69%

DISTRIBUTORS	April 10	May 1	May 15	Jun 5	Jun 26	Jul 3	Jul 10	Jul 17
Yes	50%	76%	72%	71%	44%	29%	50%	38%
No	50%	24%	28%	29%	56%	71%	50%	62%

Q6. Has your company called people back to work from layoffs since MAY?

MANUFACTURERS	Jun 26	Jul 3	Jul 10	Jul 17
Yes	44%	35%	34%	48%
No	56%	65%	66%	52%

DISTRIBUTORS	Jun 26	Jul 3	Jul 10	Jul 17
Yes	50%	50%	61%	57%
No	50%	50%	39%	43%

Q6. Please indicate what best represents your plan for office re-opening:

MANUFACTURERS	Jun 5	Jun 26	Jul 3	Jul 10	Jul 17
Full staff on-site attendance with modified on site work environment	3%	7%	4%	15%	19%
Rotating on-site staff attendance with modified on site work environment	12%	7%	9%	8%	3%
Continued work from home for most/all staff	39%	29%	26%	25%	12%
Designated on-site attendance with modified on-site work environment, and	46%	57%	61%	52%	66%

DISTRIBUTORS	Jun 5	Jun 26	Jul 3	Jul 10	Jul 17
Full staff on-site attendance with modified on site work environment	24%	15%	43%	22%	48%
Rotating on-site staff attendance with modified on site work environment	14%	22%	7%	17%	14%
Continued work from home for most/all staff	5%	4%	14%	0%	0%
Designated on-site attendance with modified on-site work environment, and	57%	59%	36%	61%	38%

Q8. Please indicate what best describes your current policy regarding 'in person' sales calls

MANUFACTURERS
Our sales people are not authorized to make any in person sales calls
Our sales people are authorized to make in person sales calls provided they meet certain safety guidelines

Jun 26	Jul 3	Jul 10	Jul 17
38%	39%	31%	19%
62%	61%	69%	81%

DISTRIBUTORS
Our sales people are not authorized to make any in person sales calls
Our sales people are authorized to make in person sales calls provided they meet certain safety guidelines

Jun 26	Jul 3	Jul 10	Jul 17
19%	43%	6%	10%
81%	57%	94%	90%

Q9. If you answered YES to question 8, please outline your safety guidelines regarding 'in person' sales calls

MANUFACTURERS
Sales calls can be made only within certain geographies in Canada.
Sales calls can be made only with certain customer types in Canada.
Sales calls can be made providing the purpose of the call meets company policy guidelines during COVID-19.
There are no restrictions to the type of customer or geography for in person sales calls.

Jun 26	Jul 3	Jul 10	Jul 17
33%	13%	35%	11%
7%	6%	9%	0%
56%	63%	50%	59%
30%	19%	35%	37%

DISTRIBUTORS
Sales calls can be made only within certain geographies in Canada.
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Jun 26	Jul 3	Jul 10	Jul 17
36%	63%	18%	16%
9%	13%	12%	11%
81%	50%	82%	84%
5%	13%	0%	16%

Q10. If you entered YES to question 8, please indicate what protocols apply to your company

MANUFACTURERS
Our company has published strict safety protocols for in person sales calls
Our company is providing our sales teams with PPE to conduct in person sales calls
Our company is allowing the sales team to use their own judgement re: safety precautions when making sales calls.

Jun 26	Jul 3	Jul 10	Jul 17
50%	60%	45%	46%
58%	47%	42%	36%
38%	33%	42%	46%

DISTRIBUTORS
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Our company is providing our sales teams with PPE to conduct in person sales calls
Our company is allowing the sales team to use their own judgement re: safety precautions when making sales calls.

Jun 26	Jul 3	Jul 10	Jul 17
73%	50%	59%	47%
82%	50%	65%	68%
27%	50%	24%	26%

Questions 9 and 10 **DO NOT** add to 100% as some companies have multiple options selected

Q11. Has your company applied for any of the available Government of Canada support programs listed below?

MANUFACTURERS
Canada Emergency Wage Subsidy (CEWS)
Temporary 10% Wage Subsidy
Business Credit Availability Program (BCAP)
Canada Emergency Business Account (CEBA)

Jul 17			
Yes	No	Considering	Unsure
37%	53%	3%	7%
15%	81%	0%	4%
8%	84%	4%	4%
15%	77%	4%	4%

DISTRIBUTORS
Canada Emergency Wage Subsidy (CEWS)
Temporary 10% Wage Subsidy
Business Credit Availability Program (BCAP)
Canada Emergency Business Account (CEBA)

Jul 17			
Yes	No	Considering	Unsure
35%	55%	5%	5%
11%	84%	0%	5%
0%	89%	6%	6%
0%	94%	0%	6%

Survey Responses	April 3	April 24	May 15	Jun 5	Jun 26	Jul 3	Jul 10	Jul 17
Manufacturers	35	43	38	33	42	23	48	32
Distributors	24	34	32	21	27	14	18	21

COMMENT SECTION

Jul 17th

Manufacturers

A resurgence in the fall is concerning

Distributors

Worsening supplier issues, between stock and errors. Anything out of Mexico is taking a really long time. Worse is the errors, we are not sure if it is the lack of employees or if it is the increase in order (for less dollars) but the are on the rise. Then couriers are probably going crazy but missing packages are on the rise!

Jul 10th

Manufacturers

push on the large infrastructure project

Q3 will be an important measurement back to (a slow) q1

Still have concerns of a potential resurgence in the fall flu season

would be nice that manufacture share the sales calls protocol documents they have established .

Distributors

n/a

Jul 3rd

Manufacturers

Need US border open

Concerned about a resurgence in the fall

Distributors

n/a

Jun 26th

Manufacturers

Expecting a resurgence in the fall, what precautions may be required? What is status of vaccine?

Would be interesting to know if

Distributors

A concerted effort by our industry to request the government to lower the CEWS threshold to 15 or 20%

Jun 19th

Manufacturers

Would be nice to know the

Considering plans for Autumn and winter

get the economy open----look to sweden

Supply chain is not affecting service, but getting employees to work in production and warehouse is proving to be difficult.

Distributors

n/a

Jun 12th

Manufacturers

Get on with opening up

Distributors

Encourage EVERYONE in the industry to lead by example and wear a mask in any business location
Alberta is not recovering at the pace of the other provinces, likely due to oil prices, not COVID19.

Jun 5th

Manufacturers

Things are slowly starting to improve

Public health admin has lost its credibility. Lets get the economy open - gradually.

Distributors

BCAP Loans inevitably end up being high interest loans and at best should only be used out of desperation

May 29th

Manufacturers

Best Industry Practises, Reps - If allowed to visit PPE Required? Mask? Gloves? Distributors - Will you allow mfg reps to visit? By appointment? or initially virtual calls?

Keep Social Distancing, Wash Your Hands, Respect Health Authorities Measures and avoid "at all price" a 2nd wave!

covid + oil is a mess. Get parliament back and make Justin accountable

Distributors

the practice of wearing masks needs to be better promoted and viewed differently by the larger community

Government programs are being handled through Guillevin's head office in Montreal

May 22nd

Manufacturers

Time to open up more

Distributors

n/a

May 15th

Manufacturers

I want out of lock down!! sweden did it right

Due to lead times of the products manufactured, believe impacts from this pandemic will affect our industry mores in the coming year rather than 2020.

Distributors

n/a