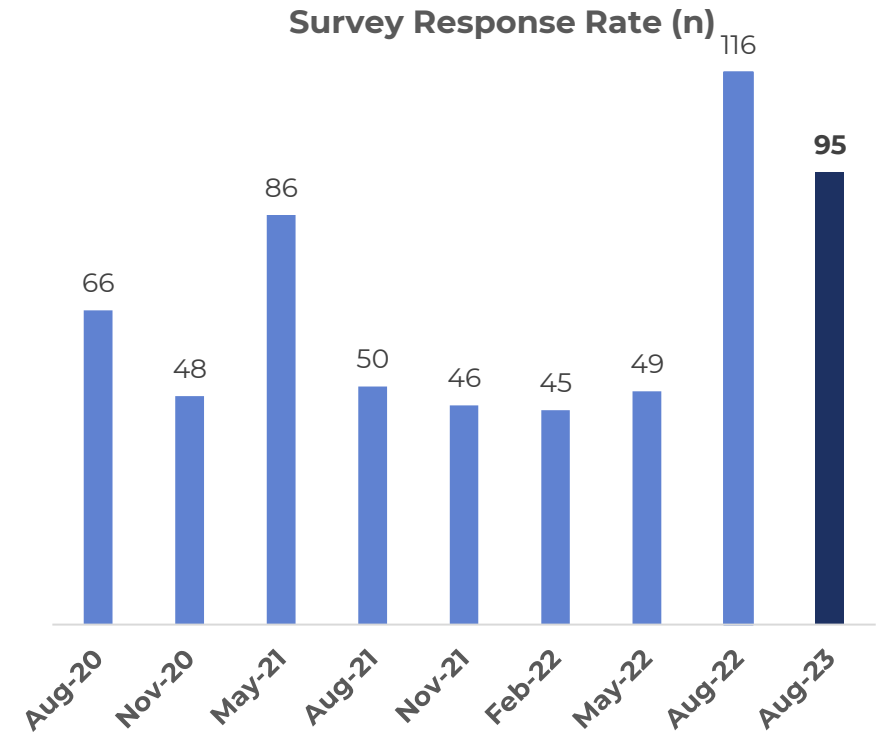
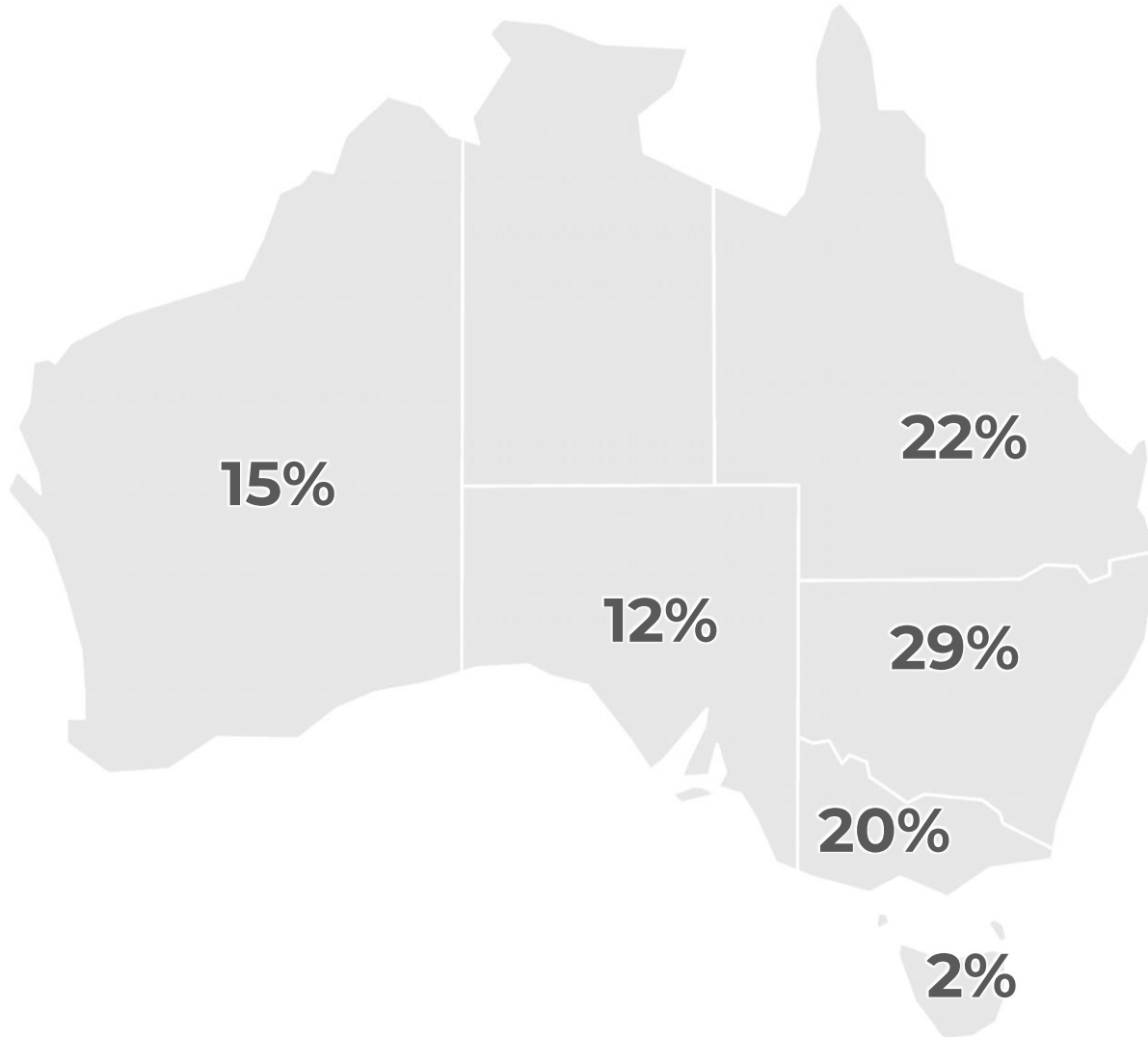


Dealer Business Sentiment Survey

**September
2023**

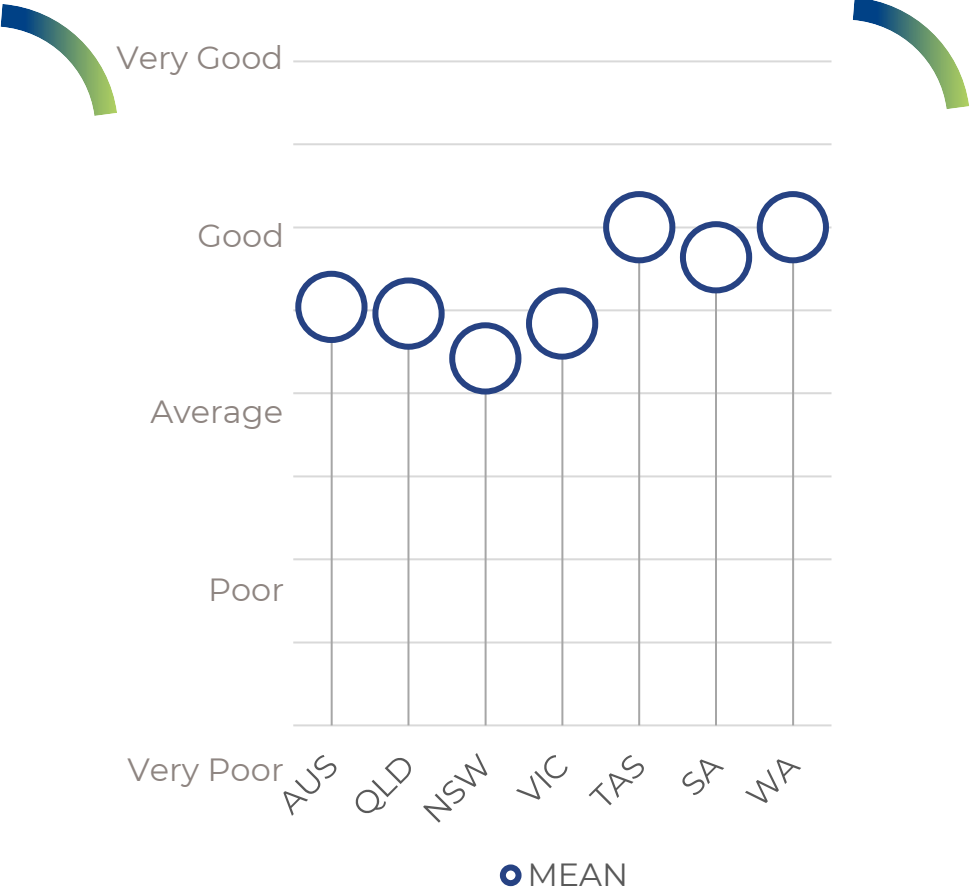
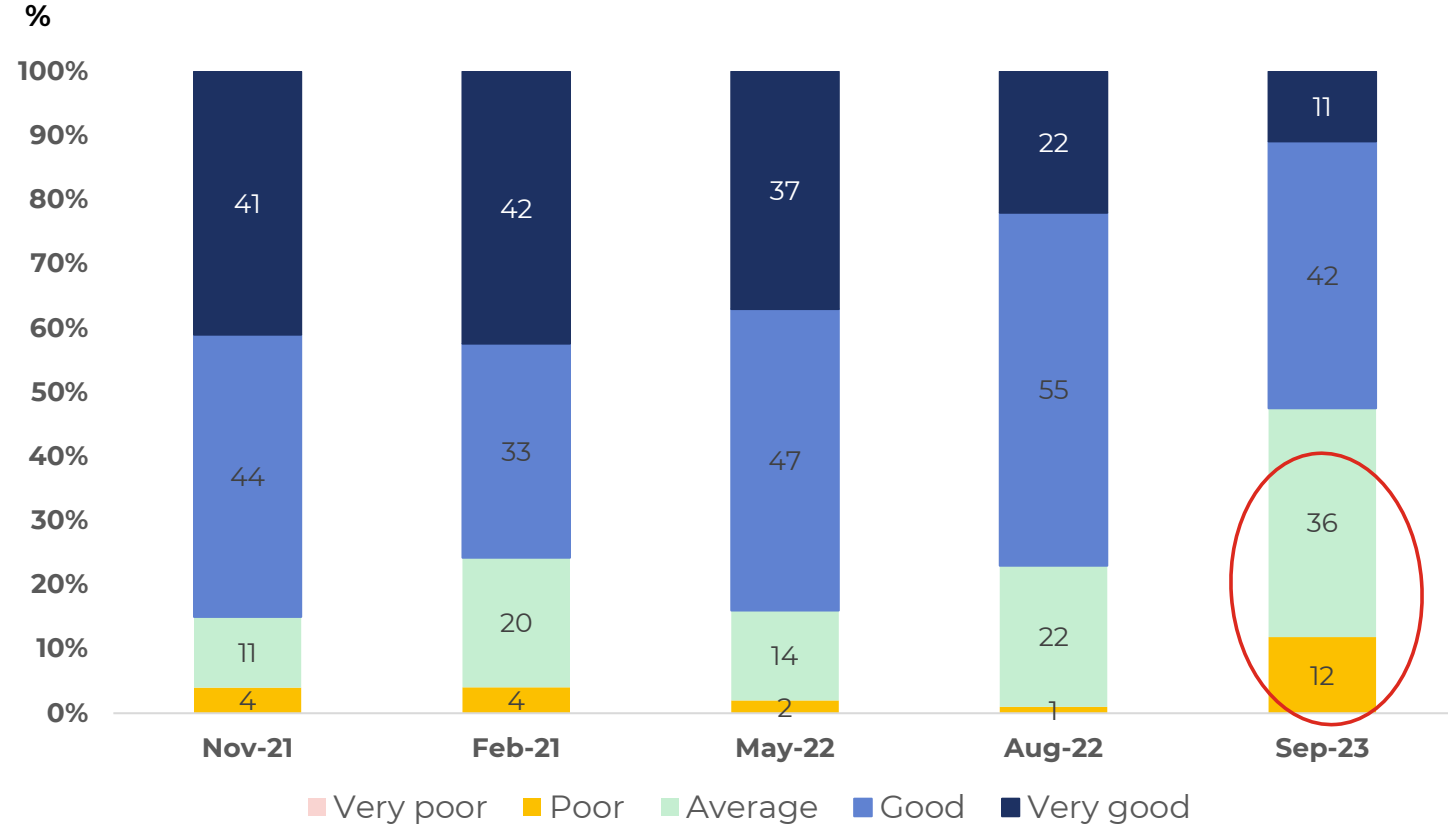
Response Sample (by State)

A solid state-based sample from the Dealer responses



Current overall turnover is...

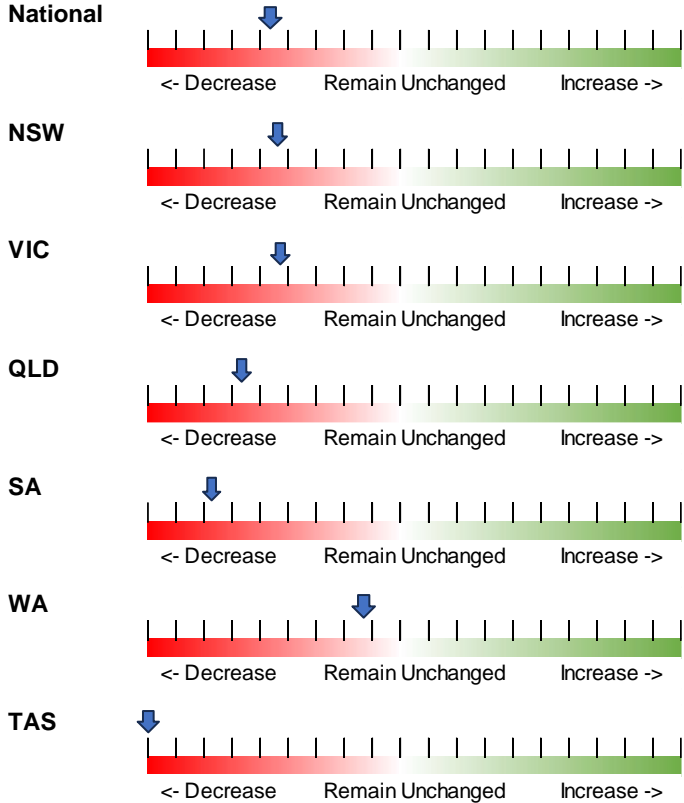
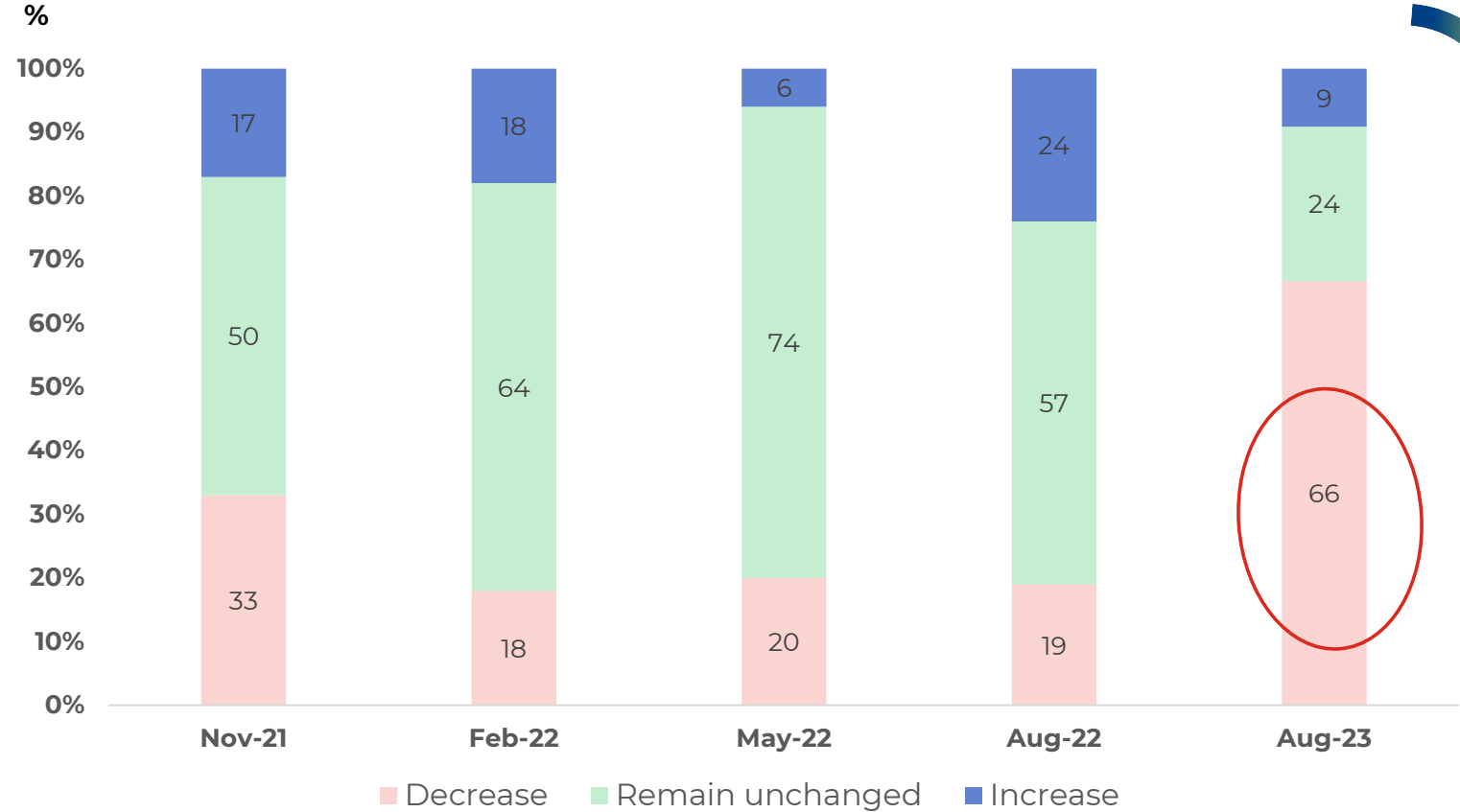
Satisfaction with turnover is reduced



Q1: We consider our current overall turnover to be; N=95

Overall turnover in the next 6 months will...

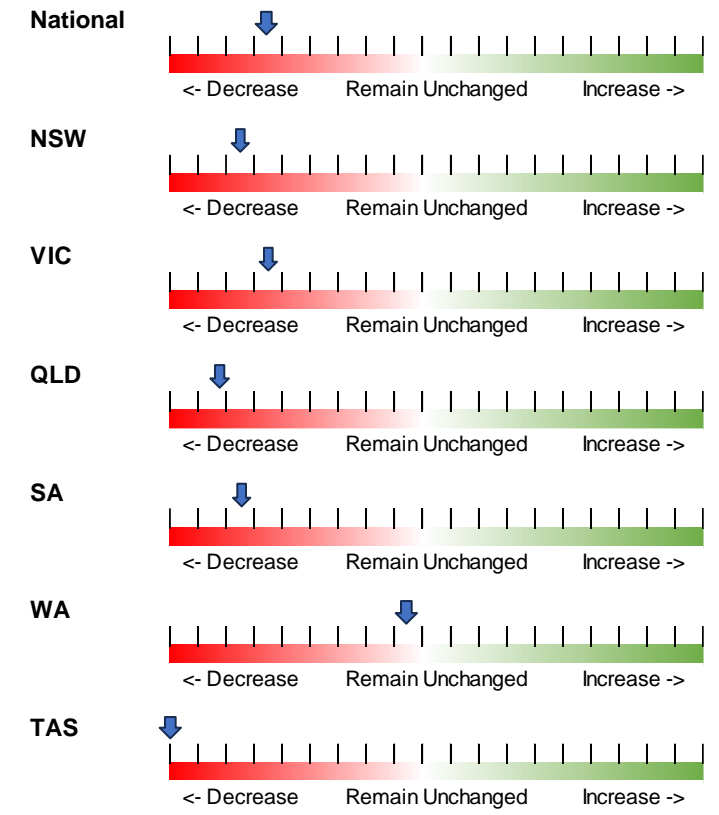
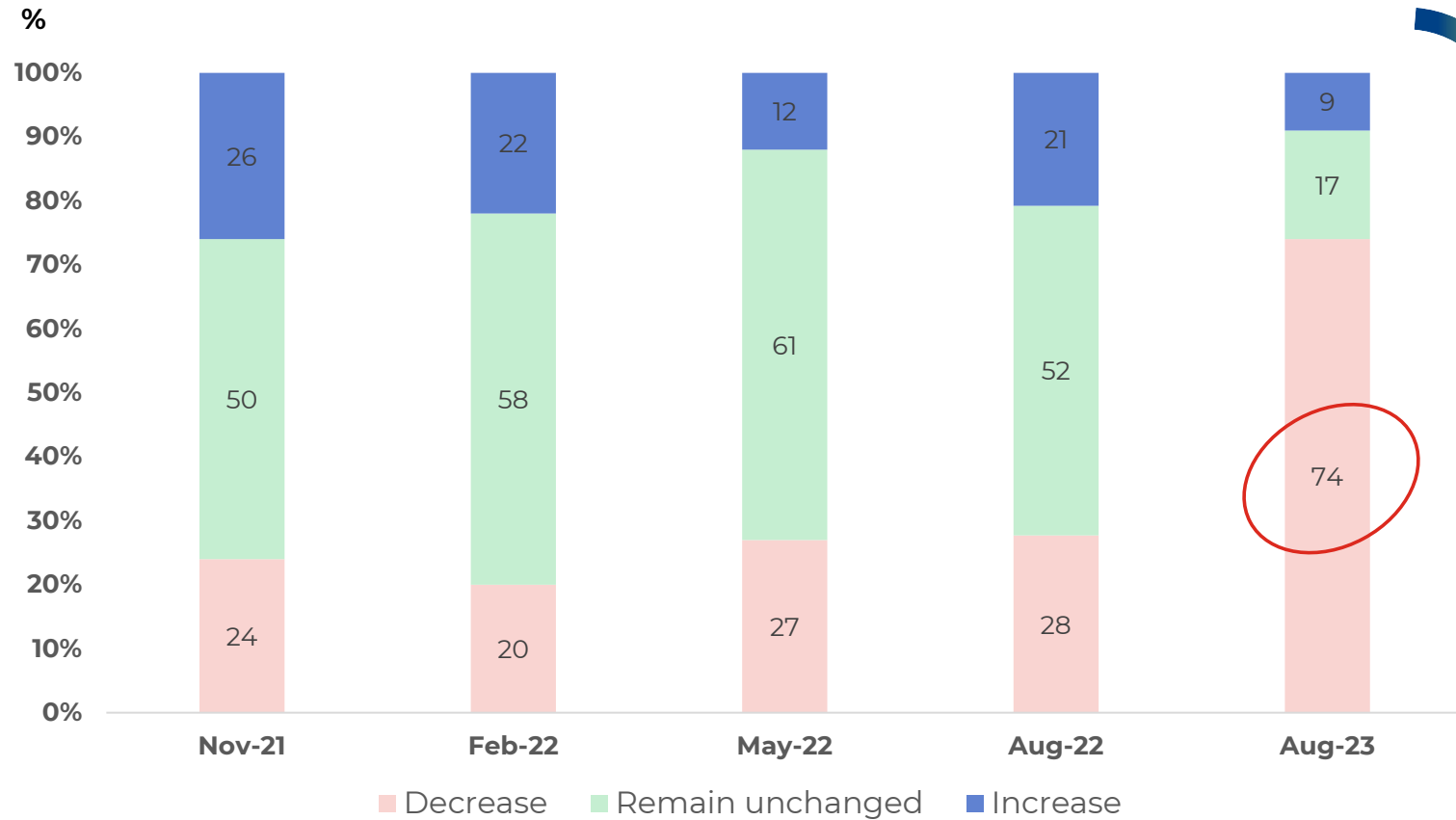
Large expectations for decreased turnover



Q2: We expect overall turnover in the next 6 months to...; N=95

New tractor sales in the next 6 months will..

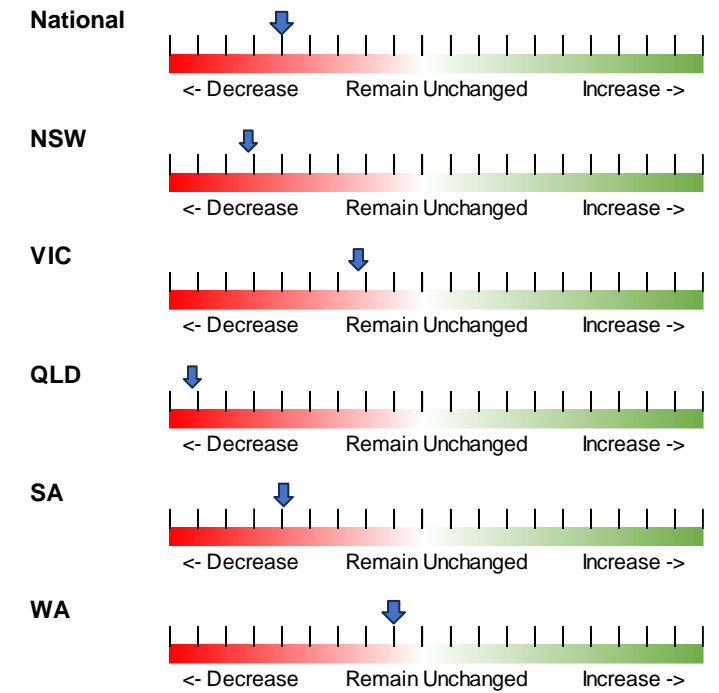
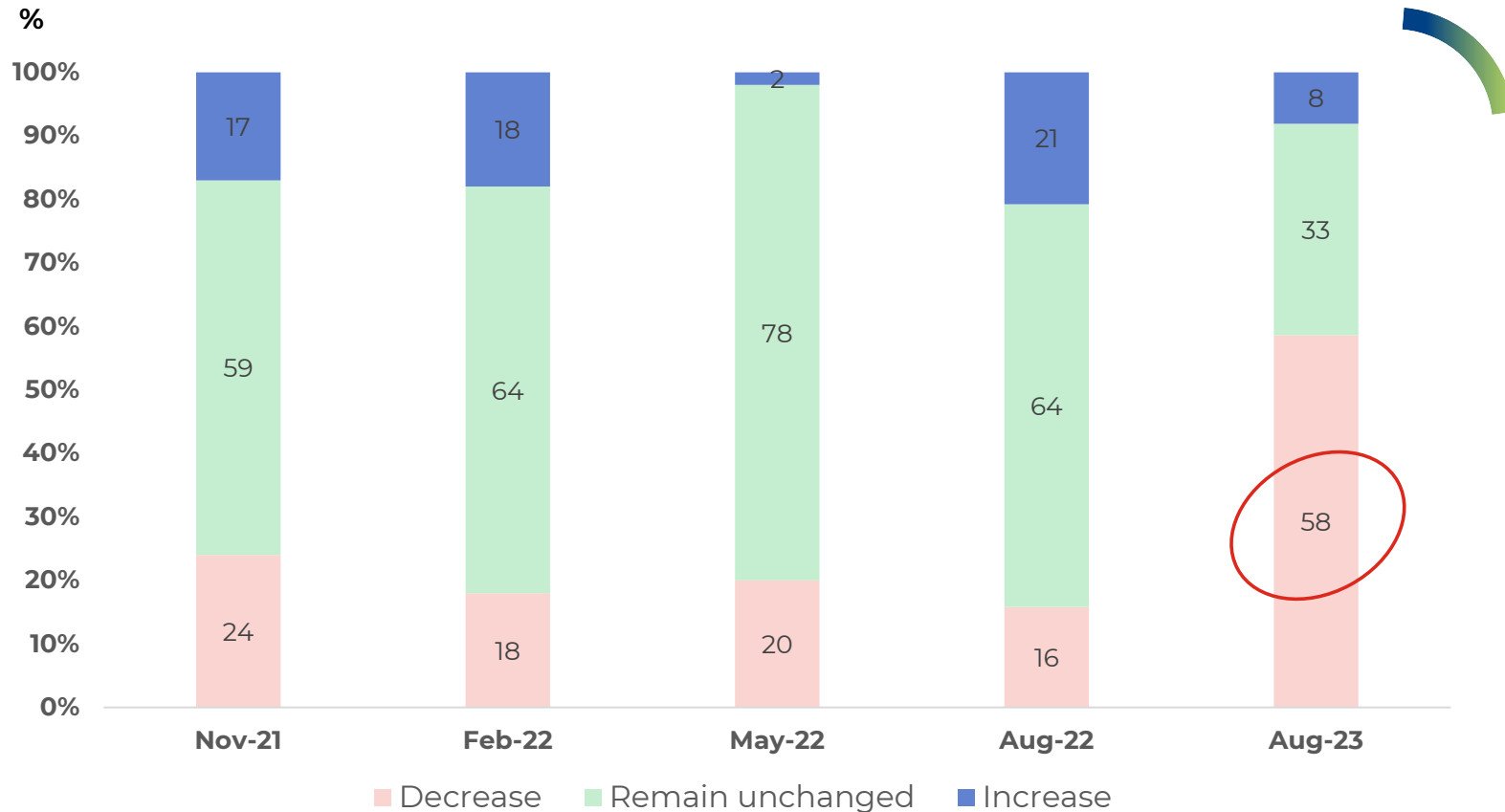
Increasing expectations for a decrease in new tractor sales



Q3: We expect new tractor sales in the next 6 months to...; N=95

New combine harvester sales in the next 6 months will...

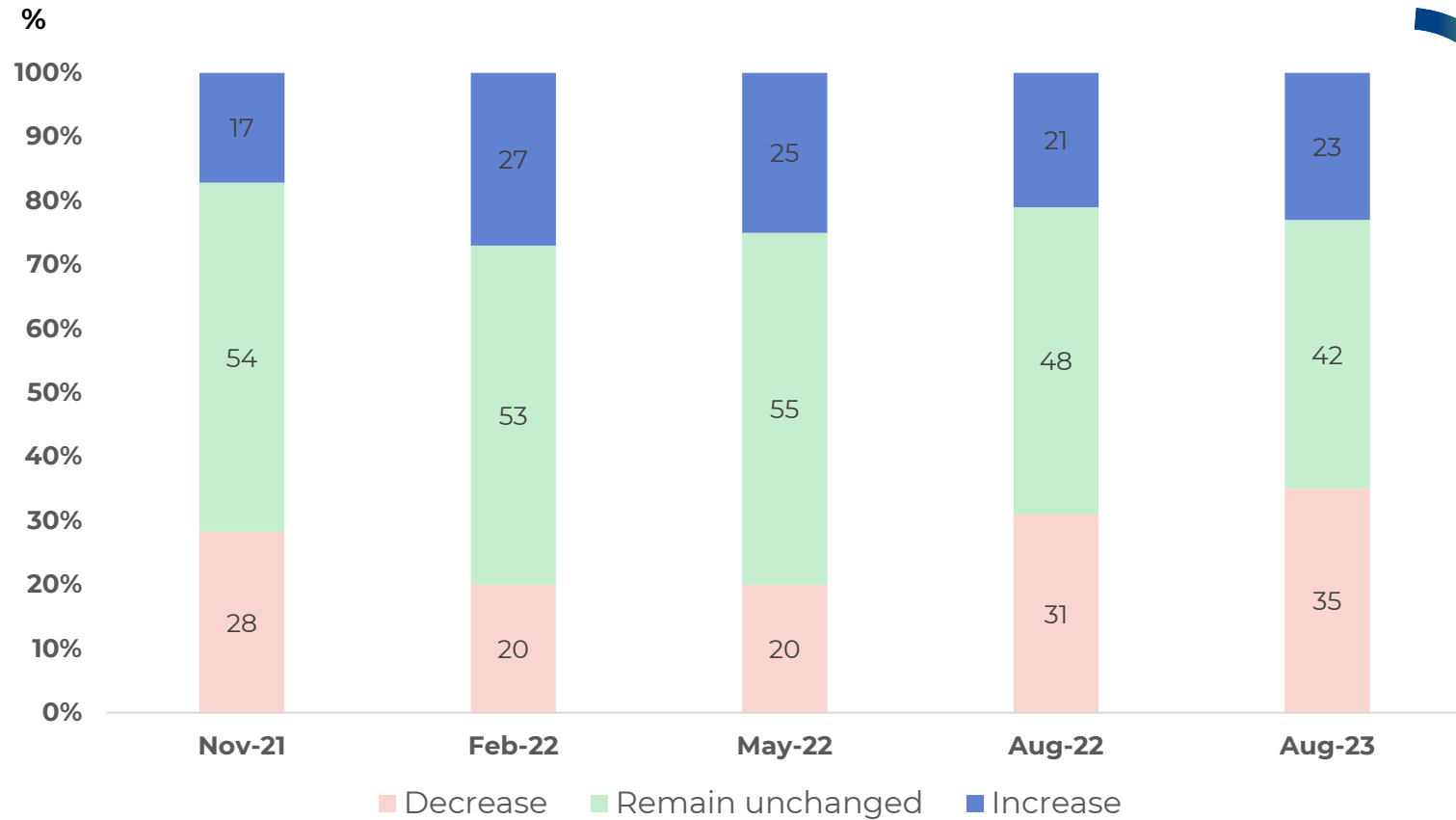
Sharp decrease in expectations for increased new combine sales



Q4: We expect new combine harvester sales in the next 6 months to...; N=60 (n=35 removed – not applicable)

New baler and hay tools sales in the next 6 months will..

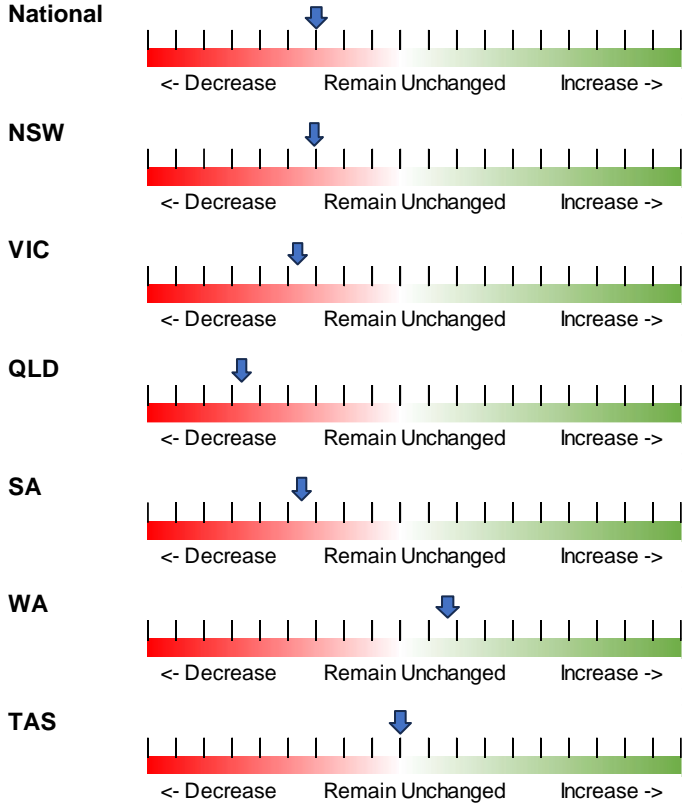
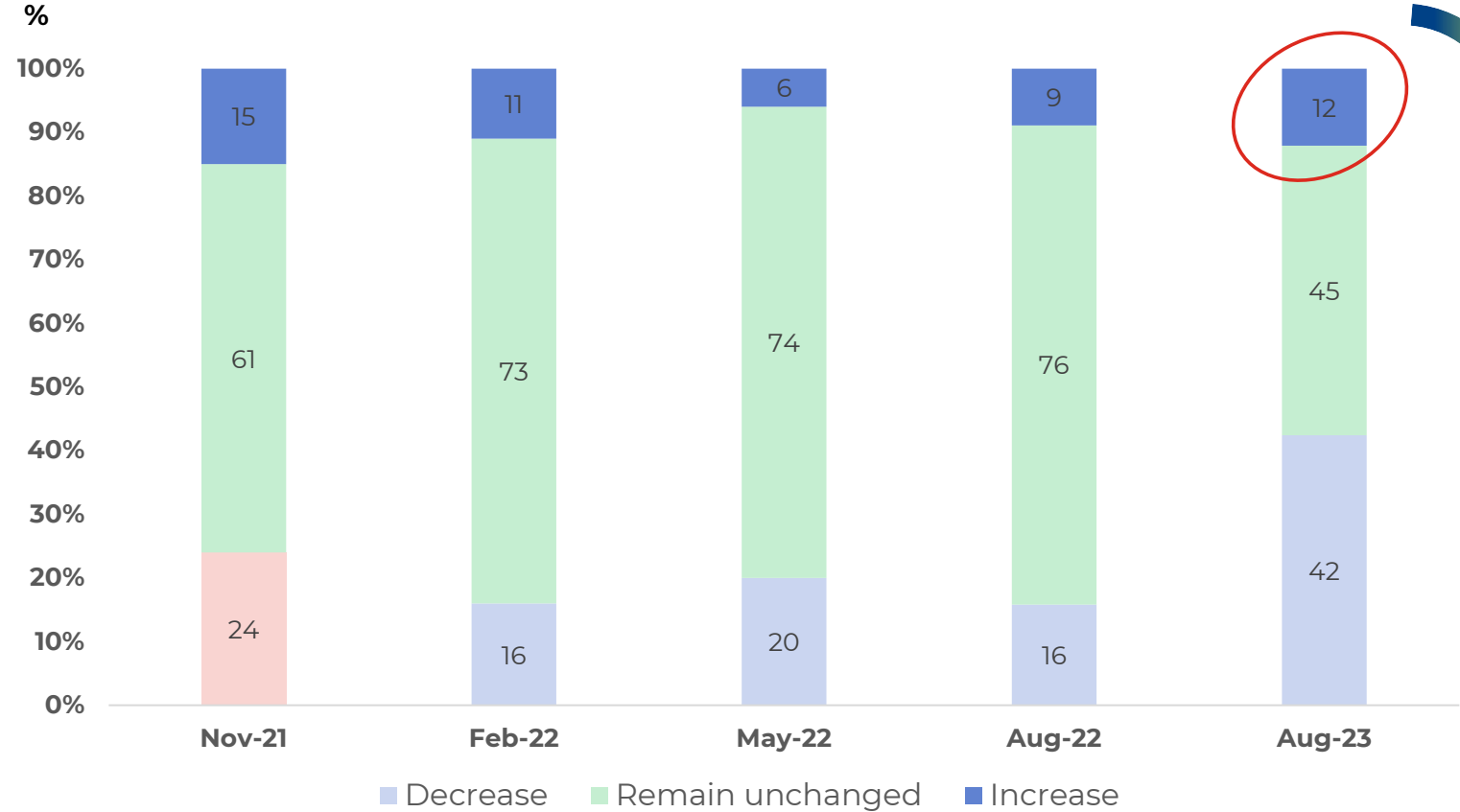
No real change for baler and hay tools sales



Q5: We expect new baler and hay tools sales in the next 6 months to...; N=86 (n=9 removed due to not applicable)

SP sprayer sales in the next 6 months will...

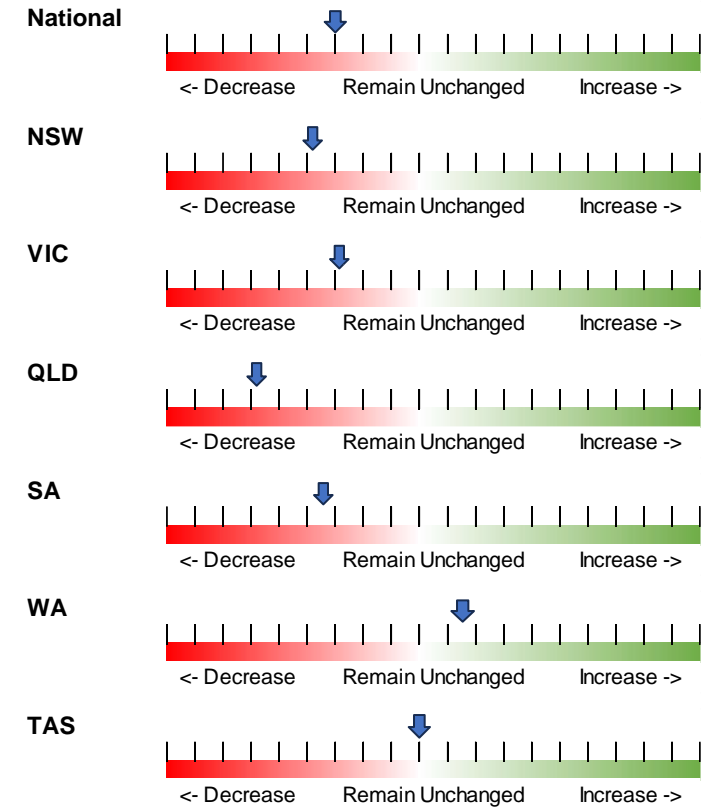
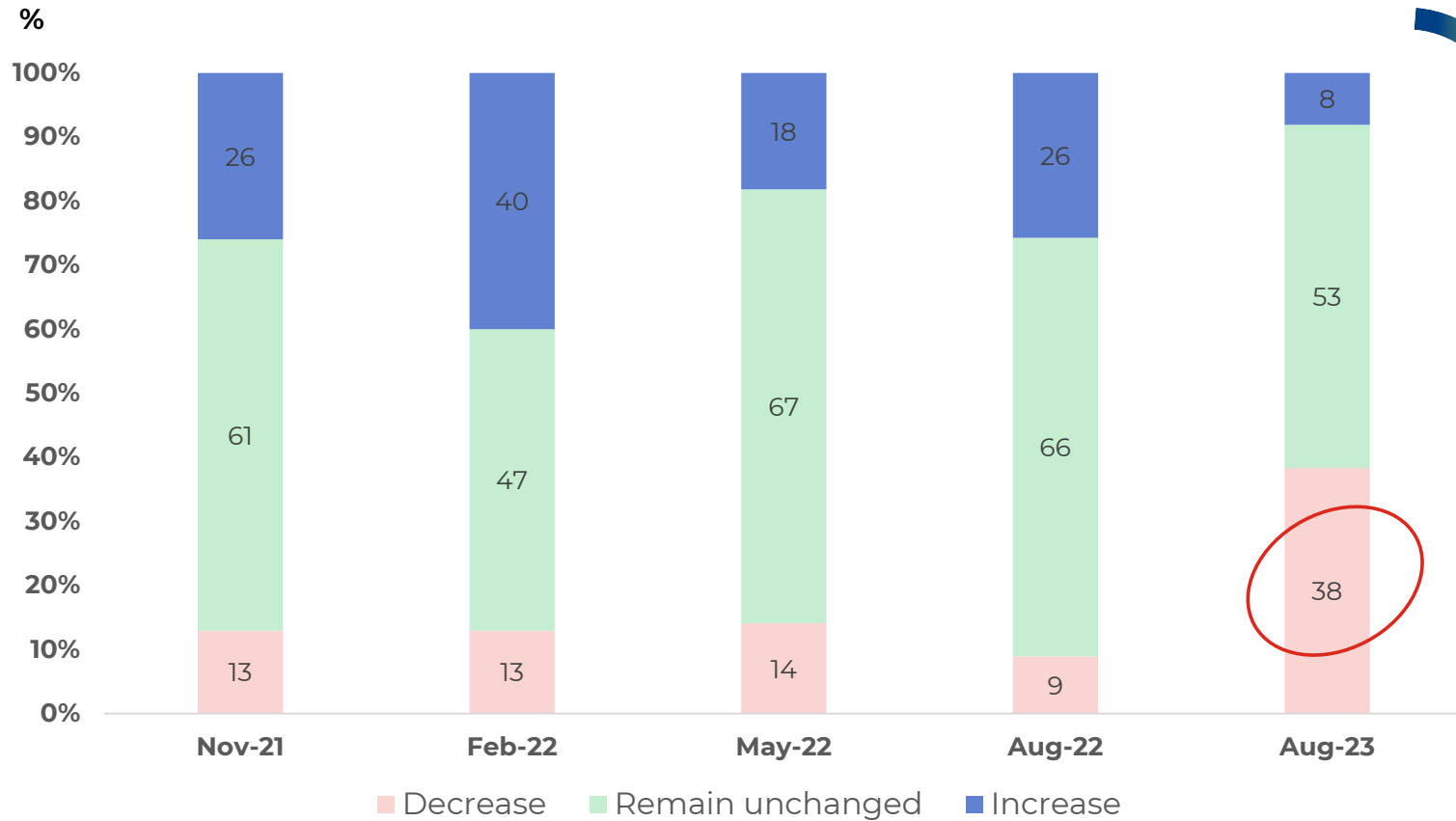
A generally positive outlook remains



Q6: We expect new SP sprayer sales in the next 6 months to...; N=66 (n=29 removed due to not applicable)

New implement sales in the next 6 months will...

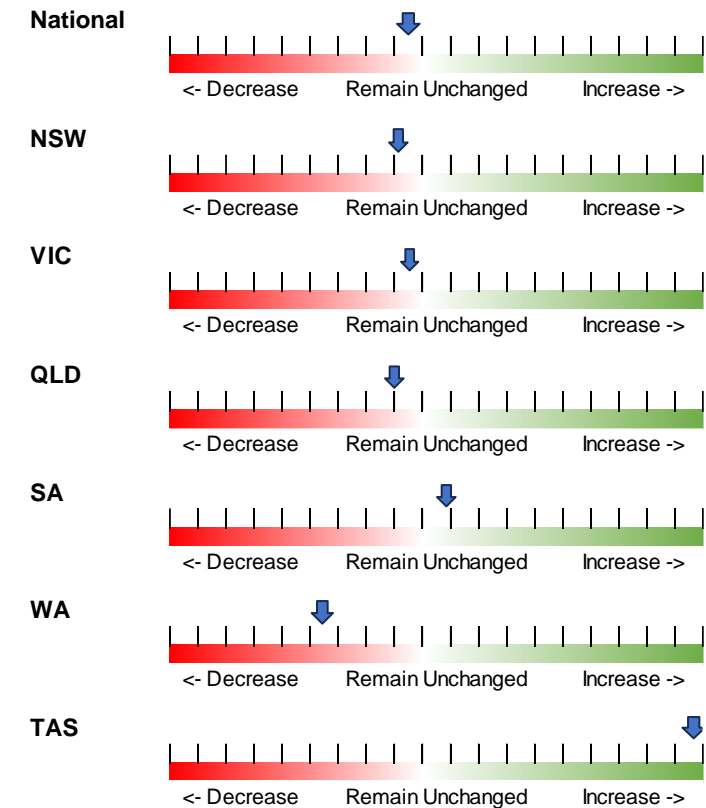
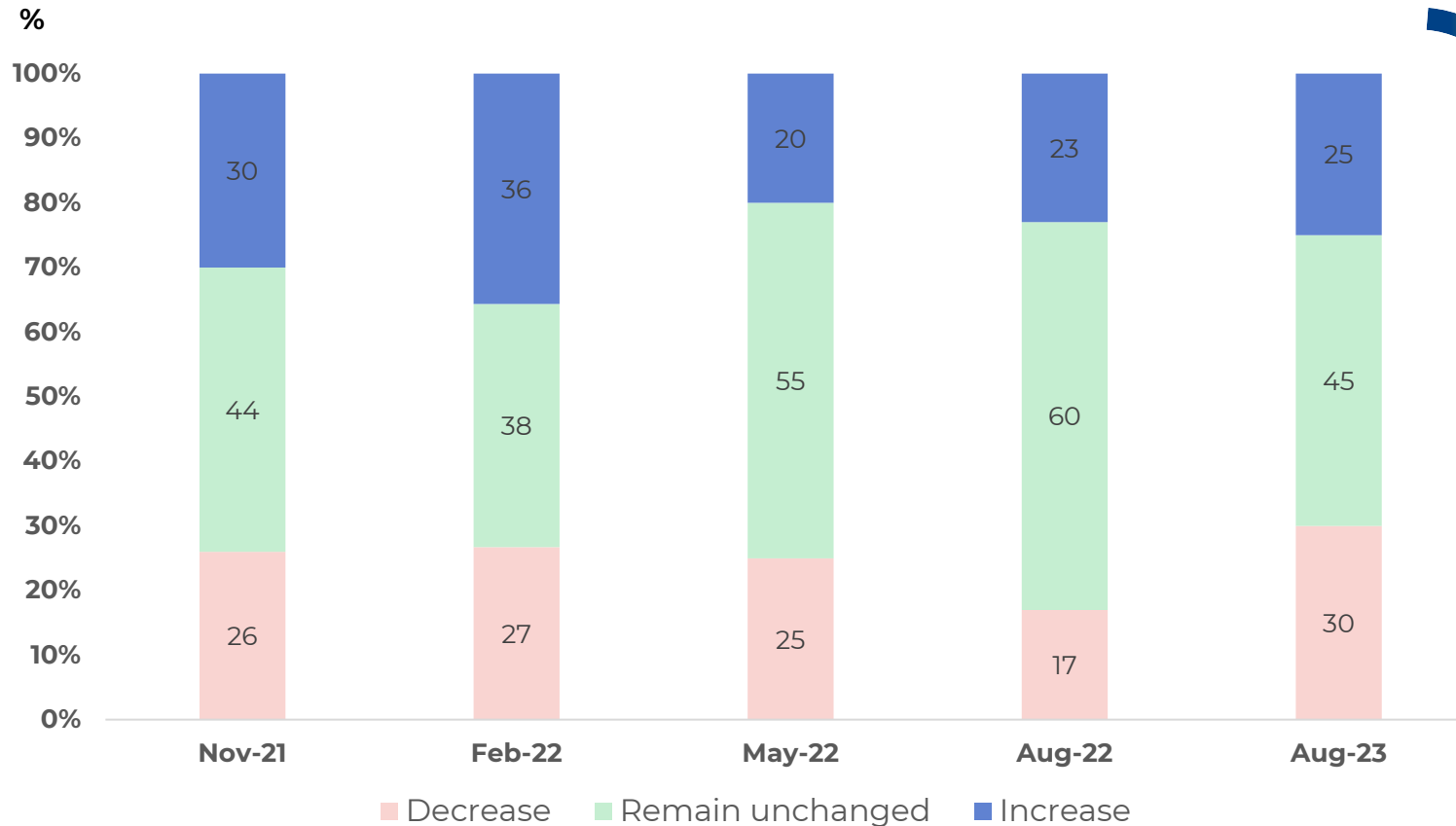
An overall negative outlook



Q7: We expect new Implement sales in the next 6 months to...; N=94 (n=1 removed due to not applicable)

Used equipment sales in the next 6 months will...

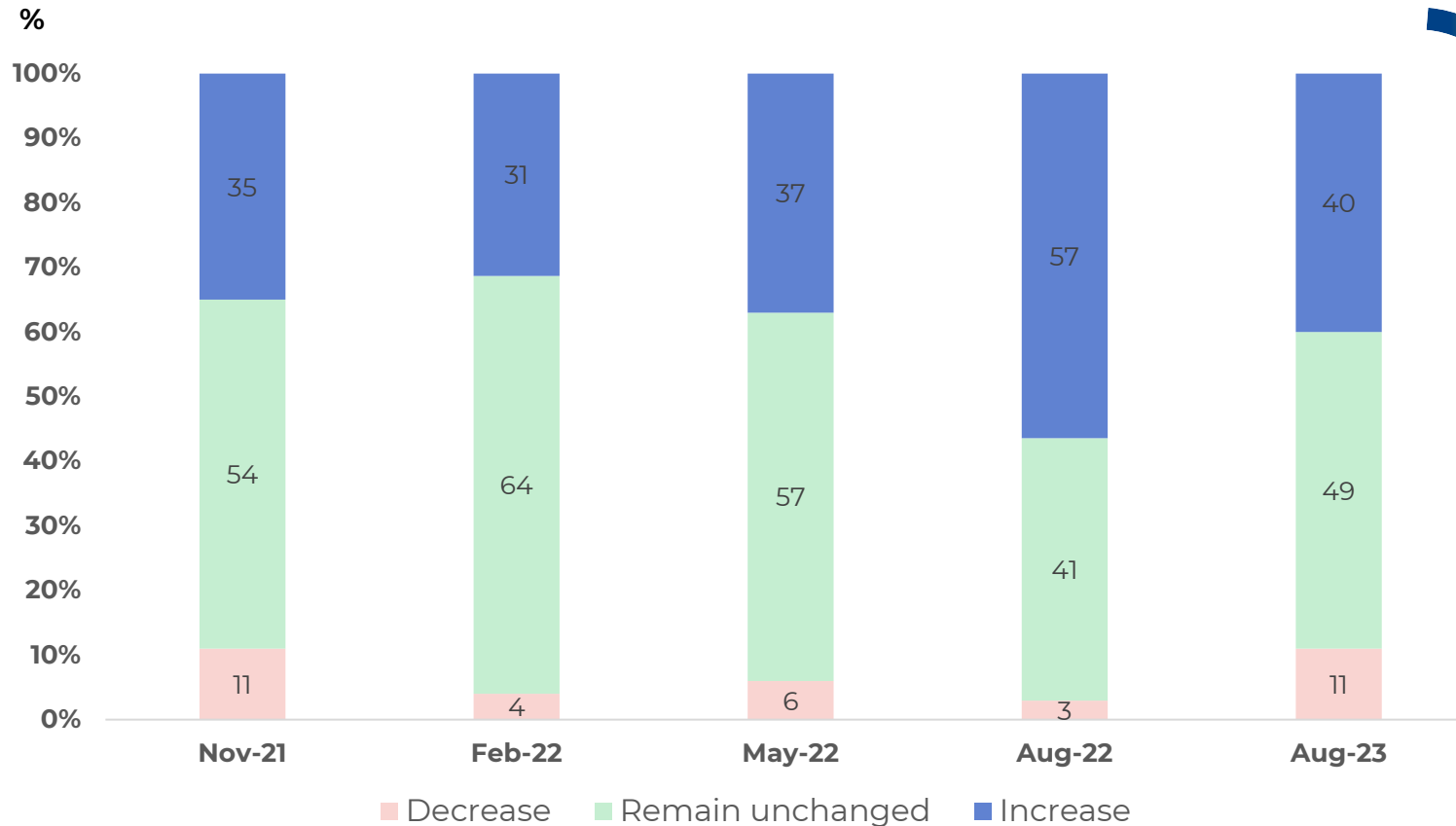
Used equipment sales remaining steady



Q8: We expect sales of used equipment in the next 6 months to...; 93 (n=2 removed due to not applicable)

After sales parts support in the next 6 months will...

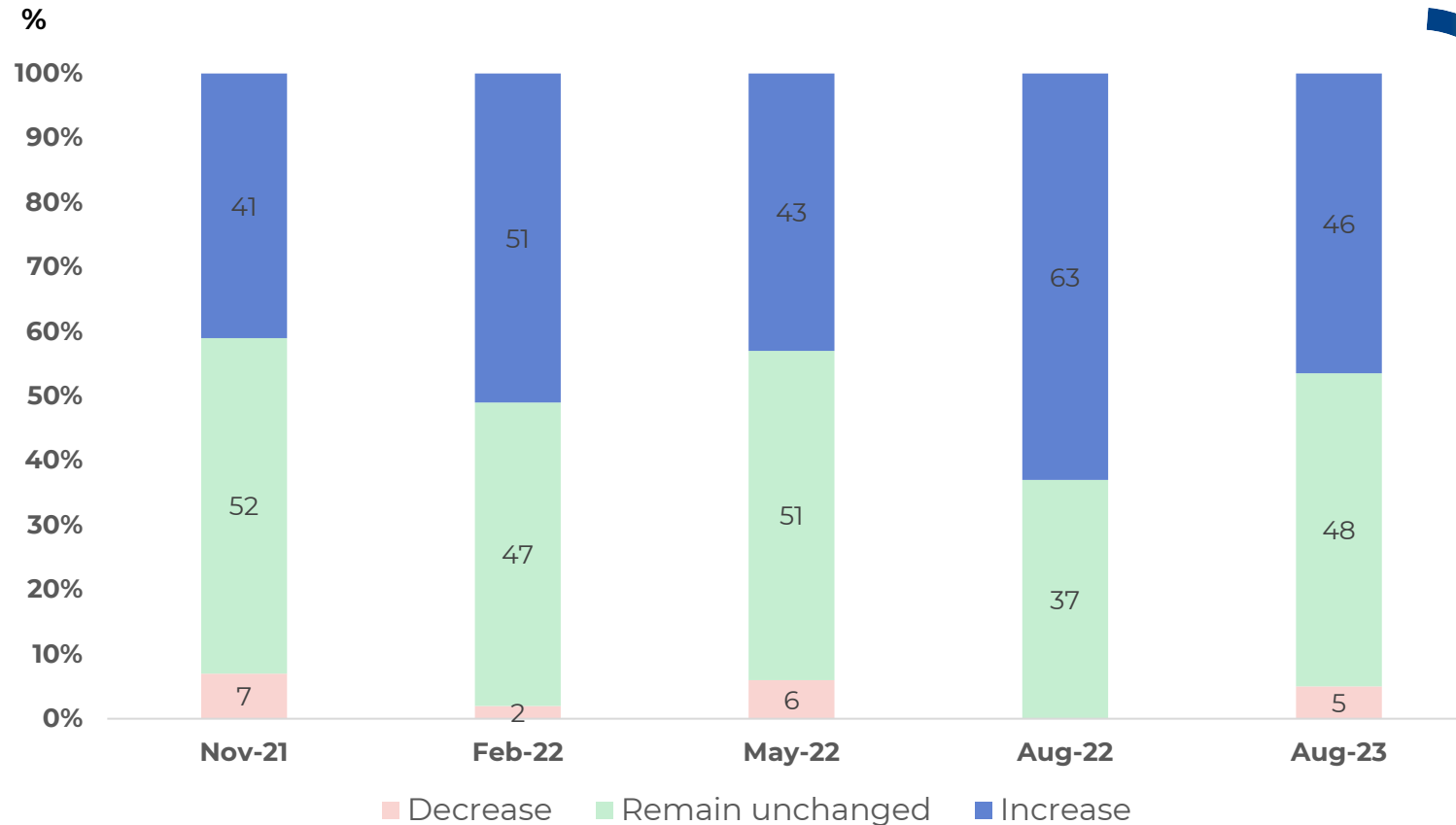
Support for after sales 'parts' remain relatively unchanged



Q9: We expect after sales product support in the next 6 months to ...; n=95

After sales service support in the next 6 months will...

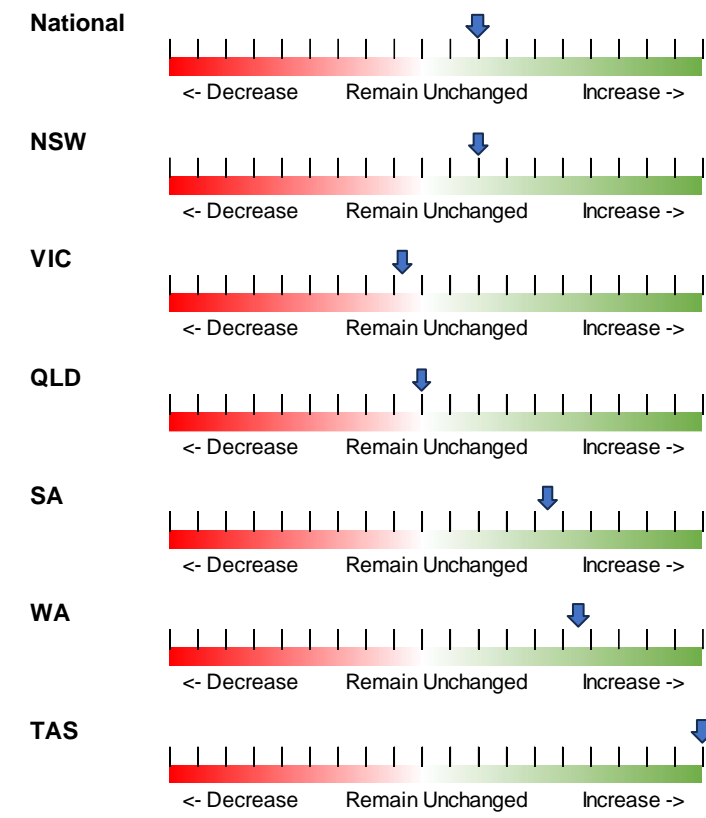
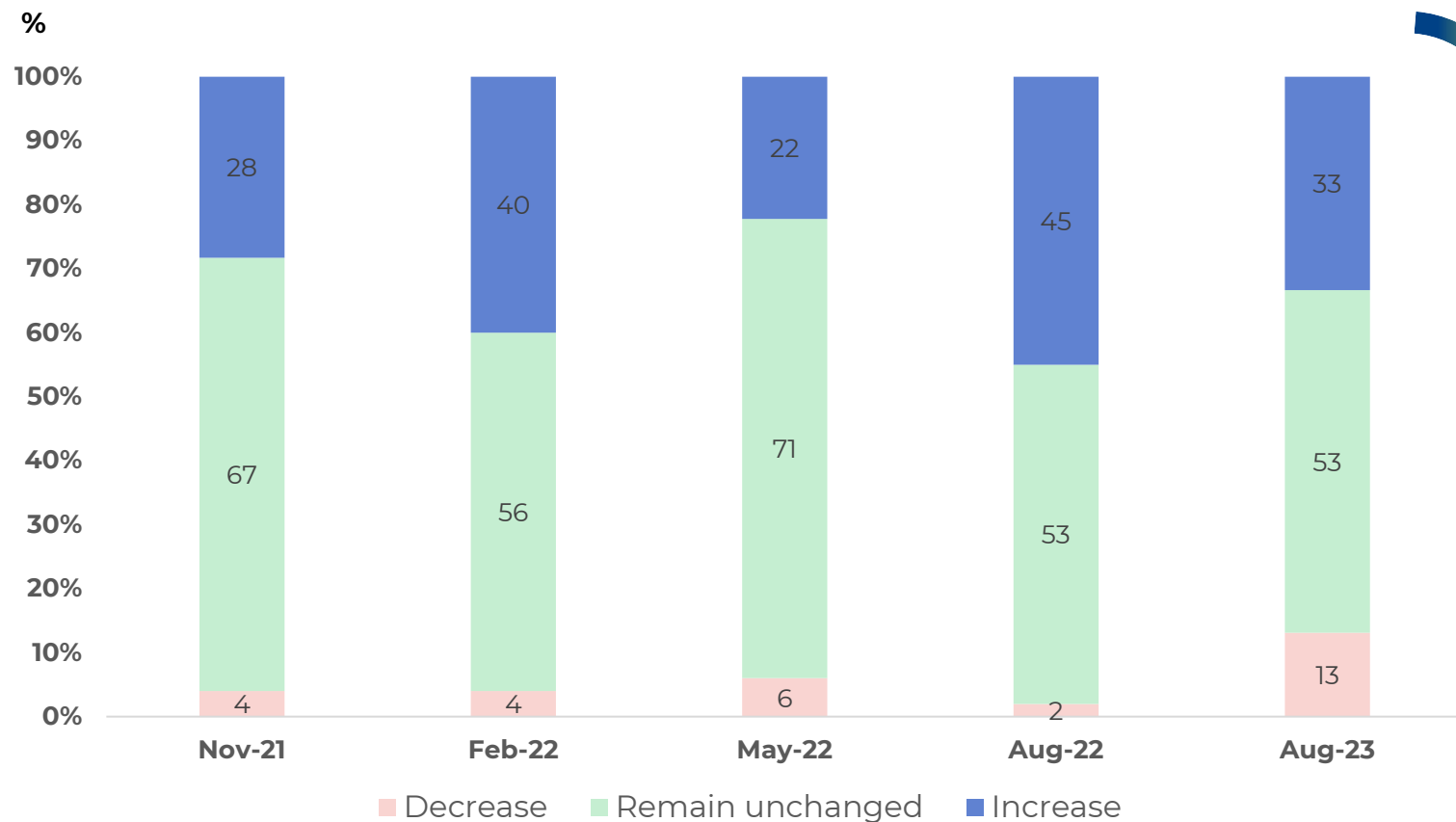
Support for after sales 'service' remain relatively unchanged



Q10: We expect after sales service support in the next 6 months to ...; n=95

After sales technology support in the next 6 months will...

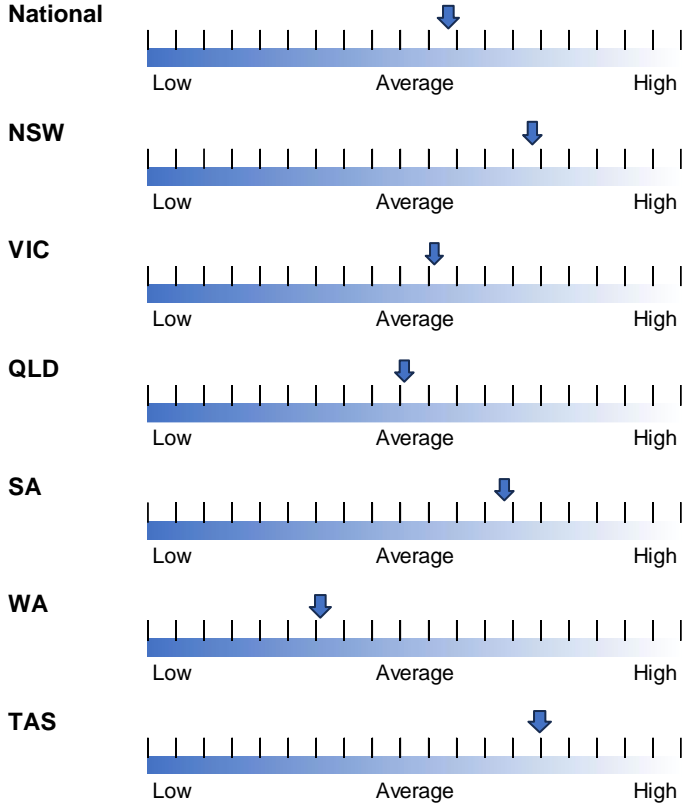
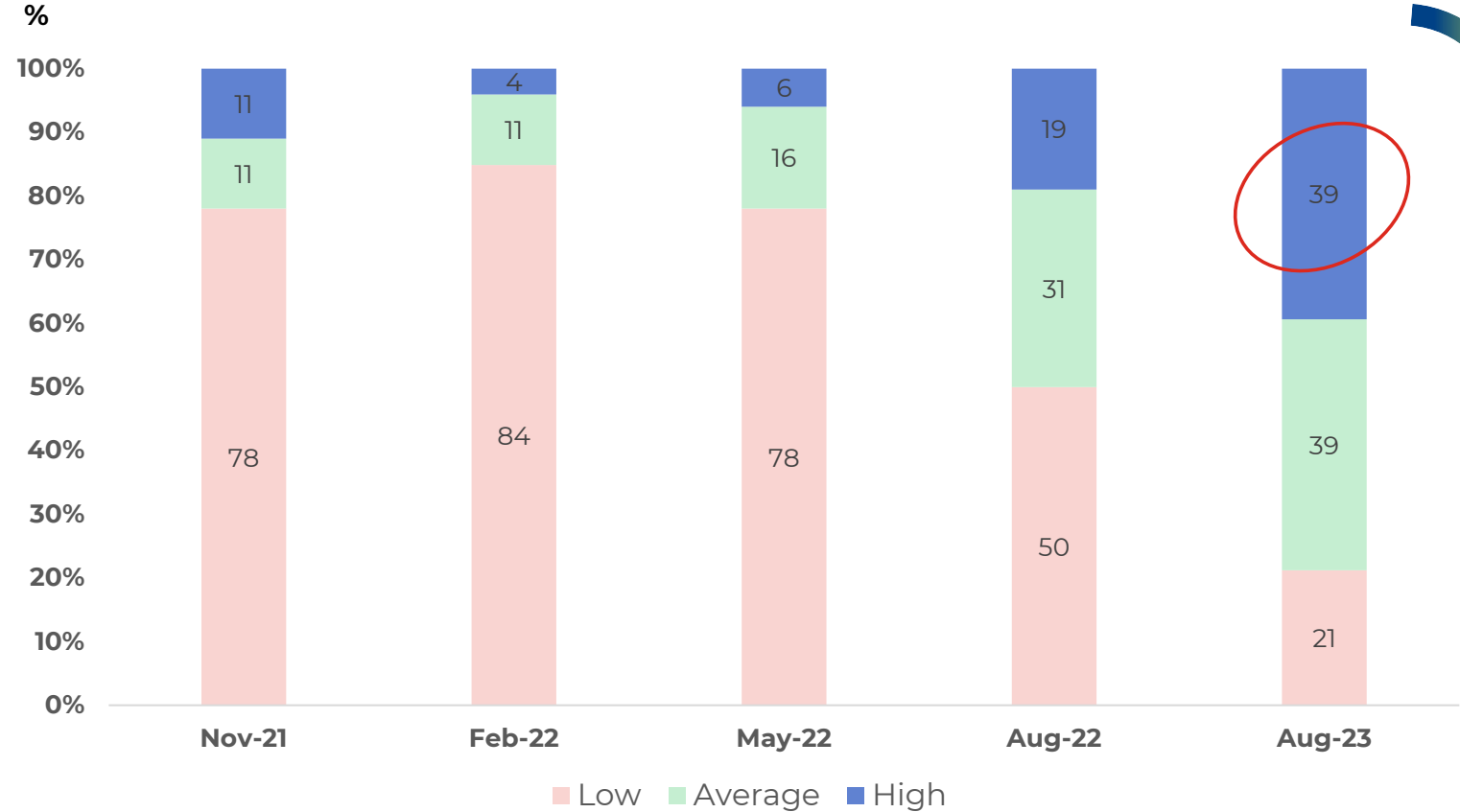
Support for after sales 'technology' has reduced



Q11: We expect after sales technology support in the next 6 months to ...; n=90 (n=5 removed due to not applicable)

Current new tractor inventory levels are...

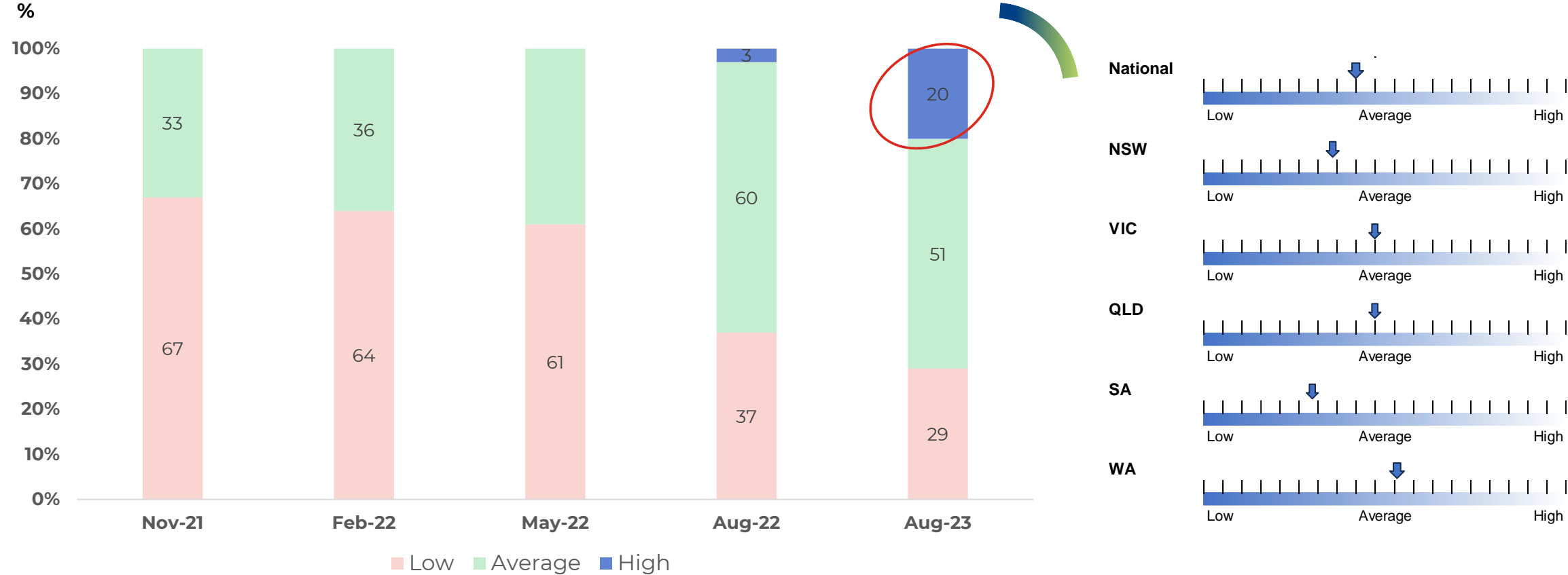
Significant change in view of new tractor inventory levels.



Q12: Do you think your current new Tractor inventory levels are...; N=95

Current new combine harvester inventory levels are...

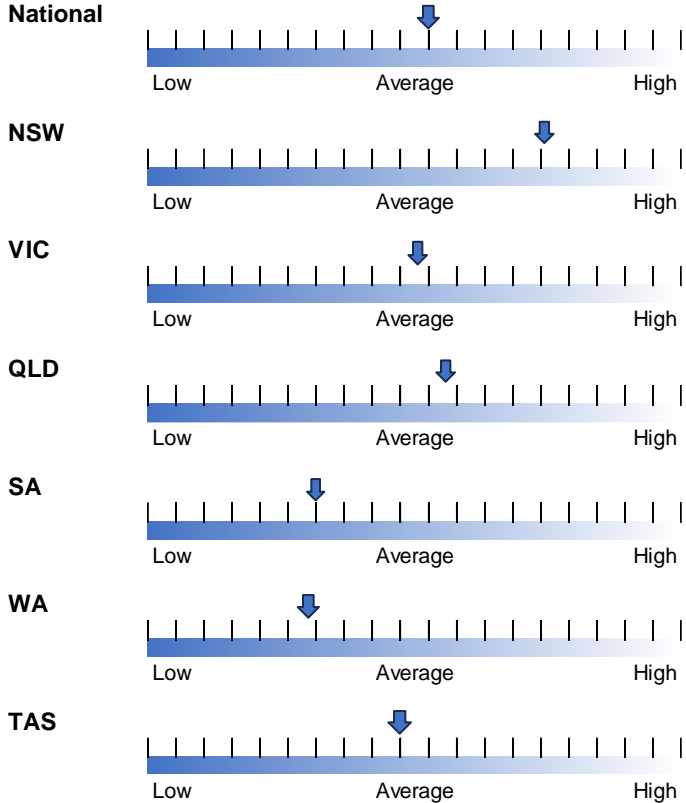
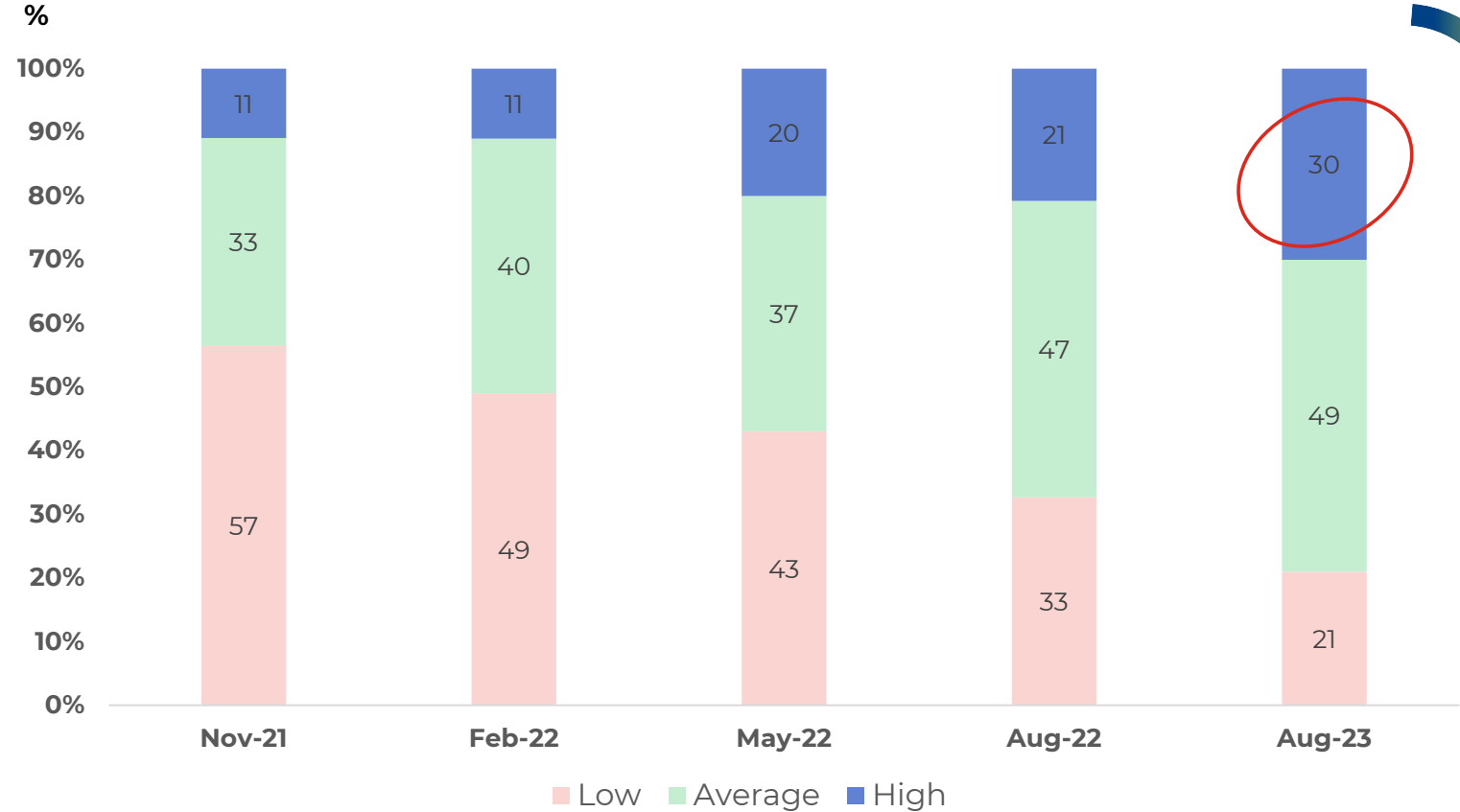
Significant change in view of new combine harvester inventory levels.



Q13: Do you think your current new combine harvester inventory levels are...; N=51 (n=44 removed due to not applicable)

Current new baler and hay tools inventory levels are...

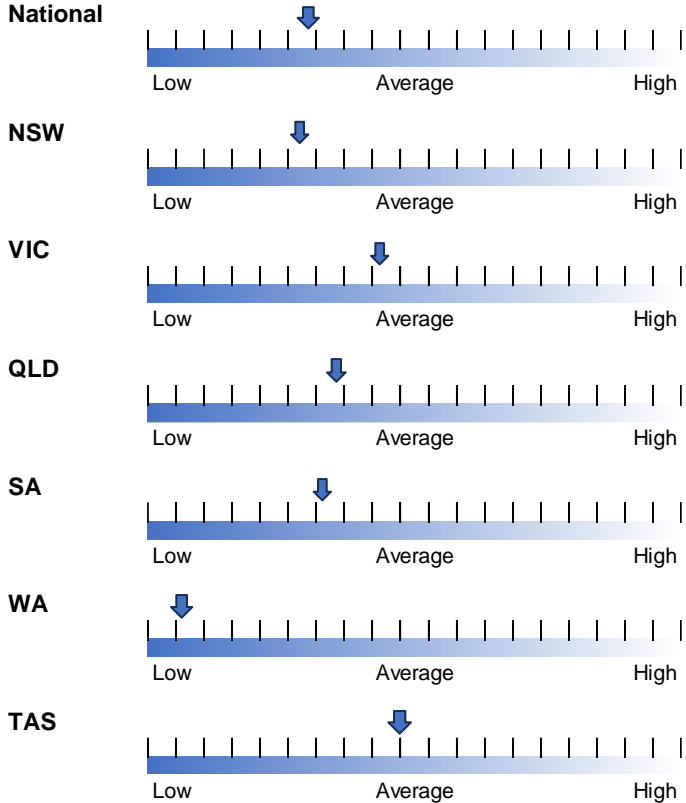
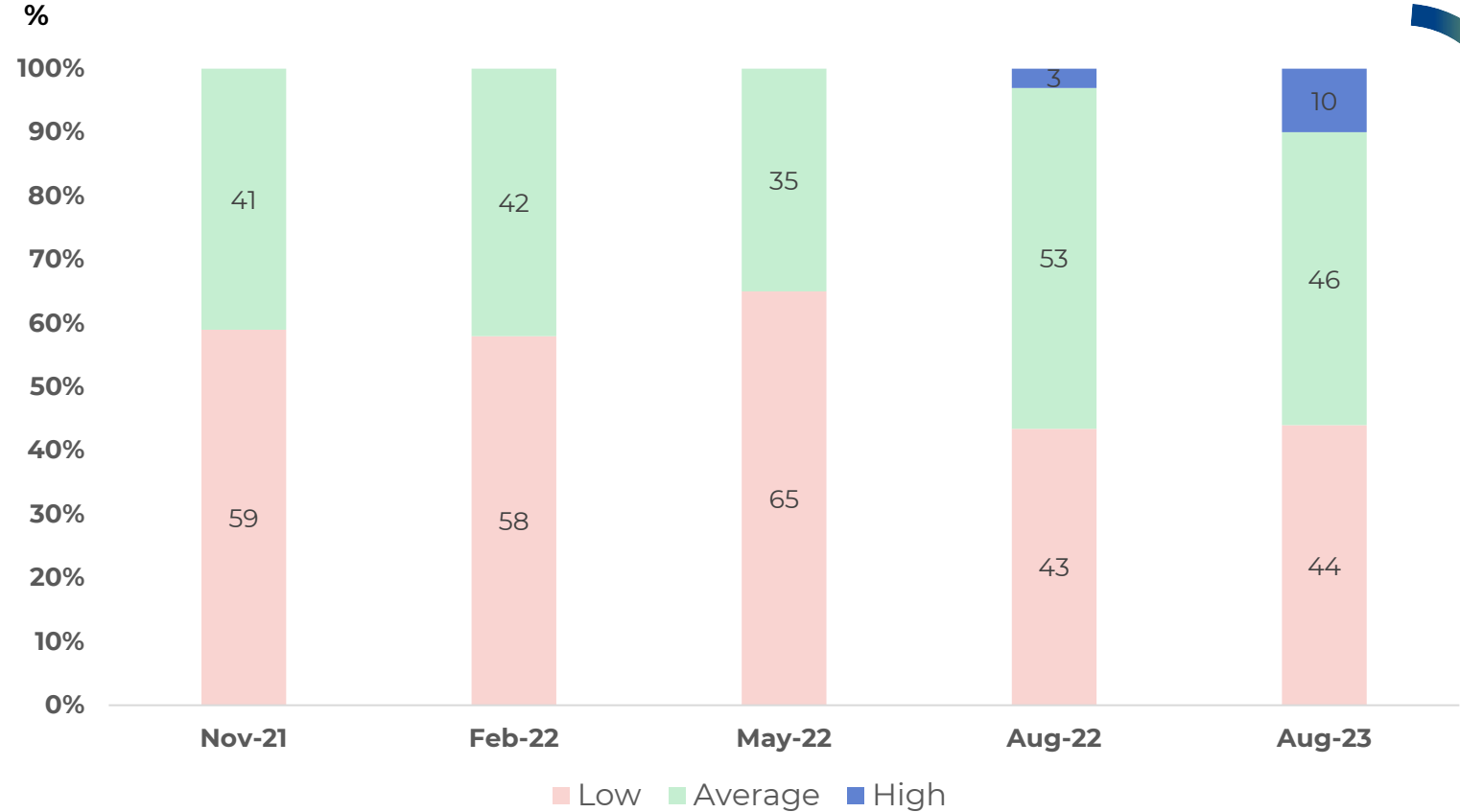
Situation continuing to improve with new baler and hay tools inventory



Q14: Do you think your current new baler and hay tools inventory levels are...; n=82 (n=13 removed due to not applicable)

Current new SP sprayer inventory levels are...

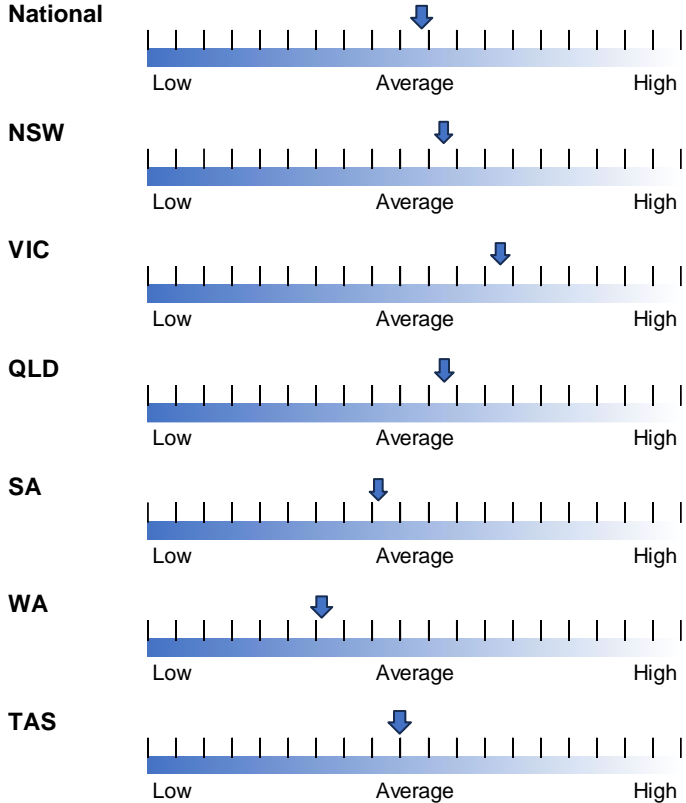
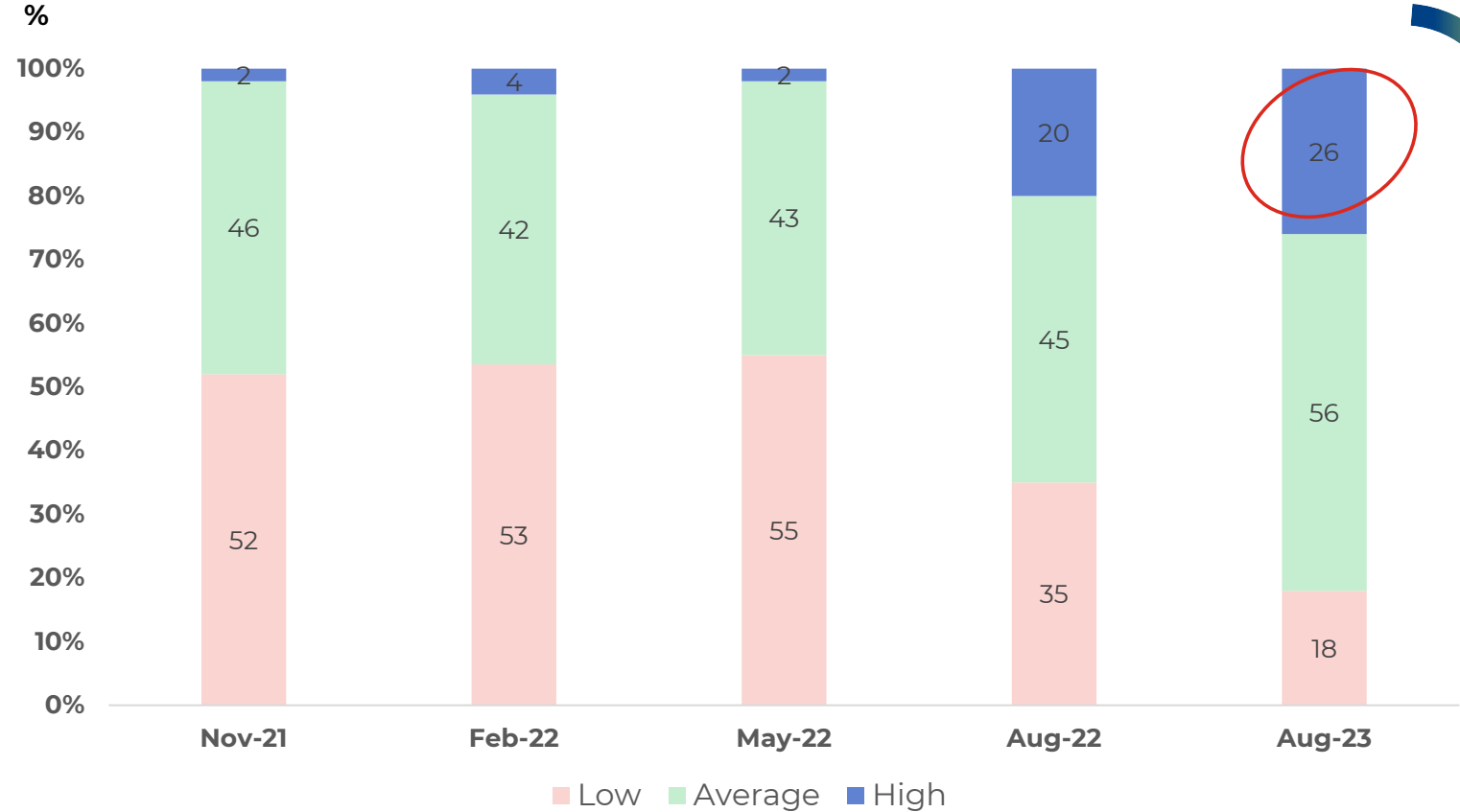
Situation improving with new SP sprayer inventory



Q15: Do you think your current new SP Sprayer inventory levels are...; N=61 (n=34 removed due to not applicable)

Current new implement inventory levels are...

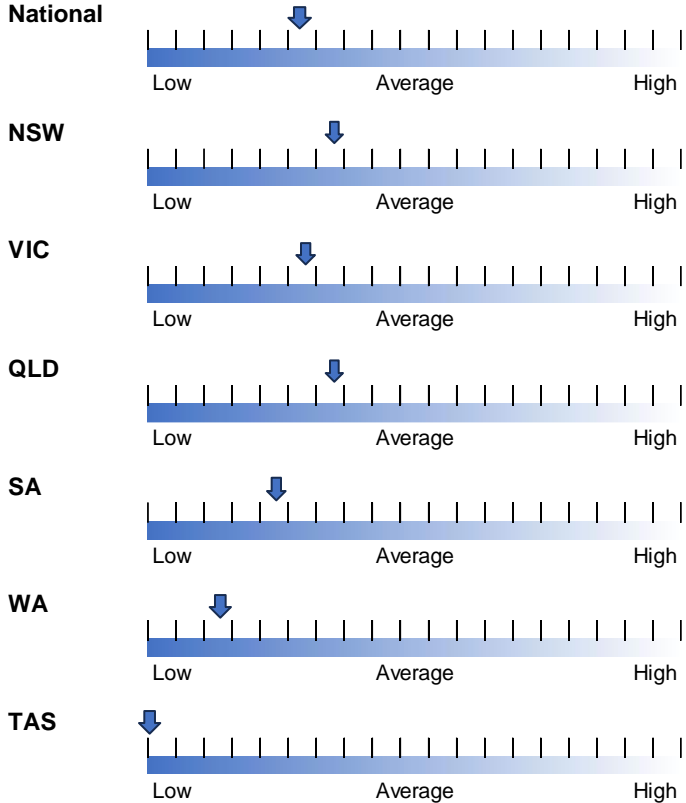
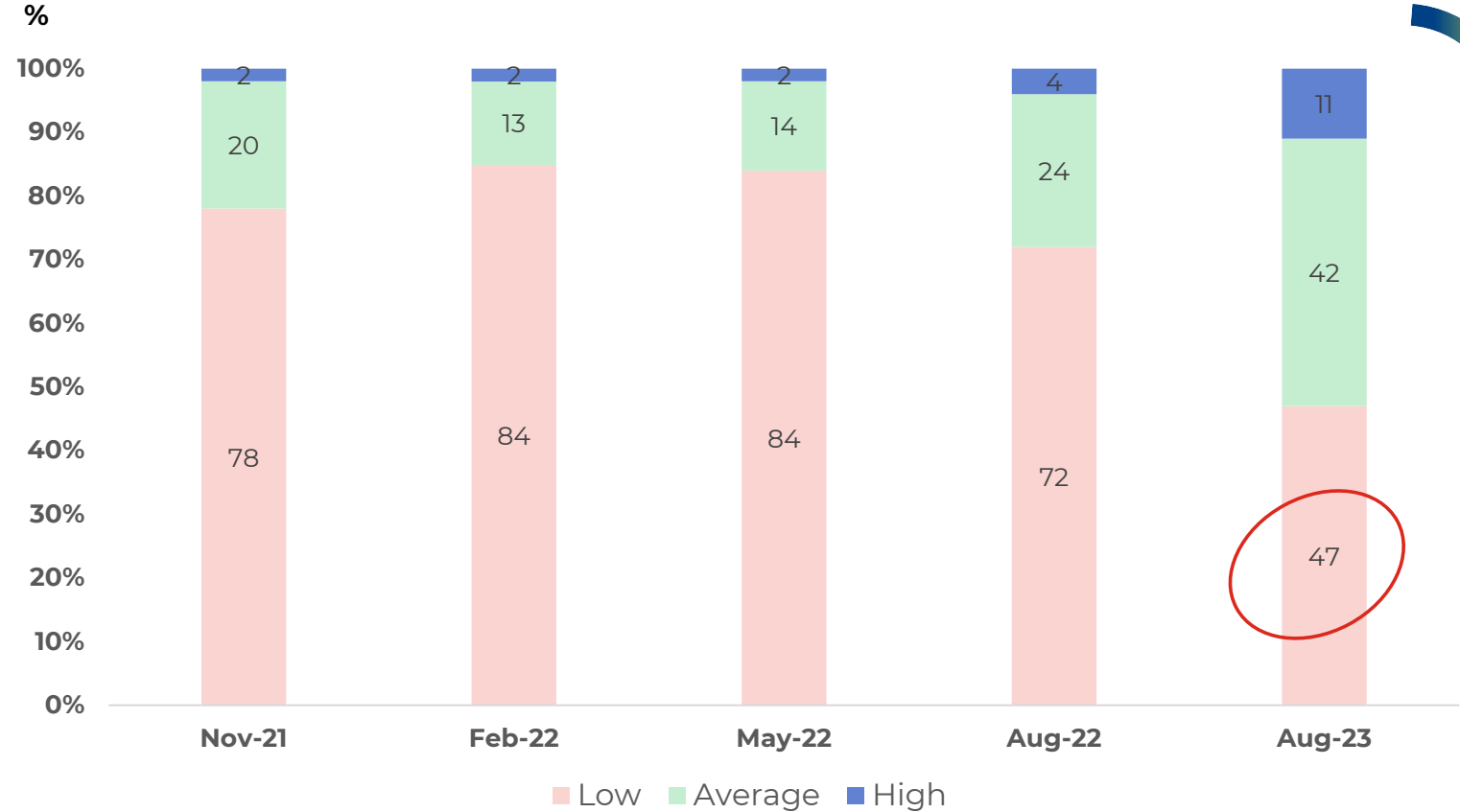
Declining demand for new implements?



Q16: Do you think your current new Implement inventory levels are...; N=91 (n=4 was removed due to not applicable)

Current used tractor inventory levels are...

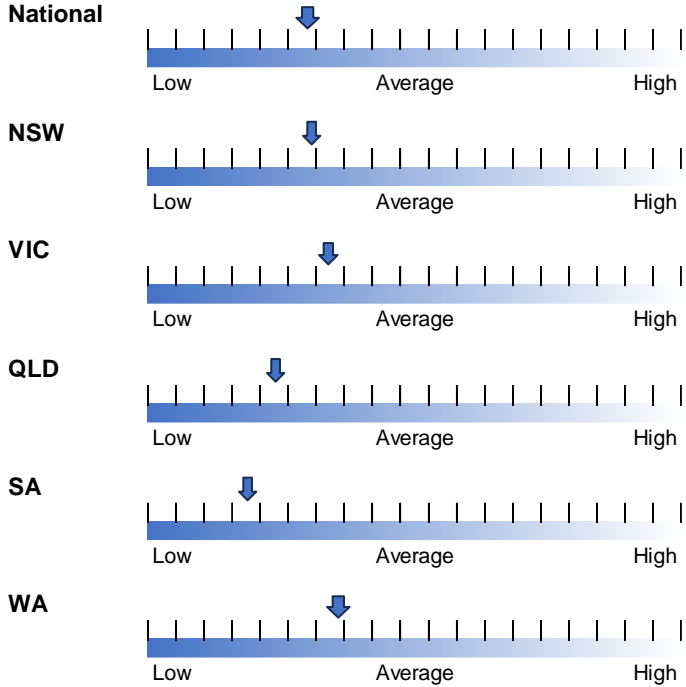
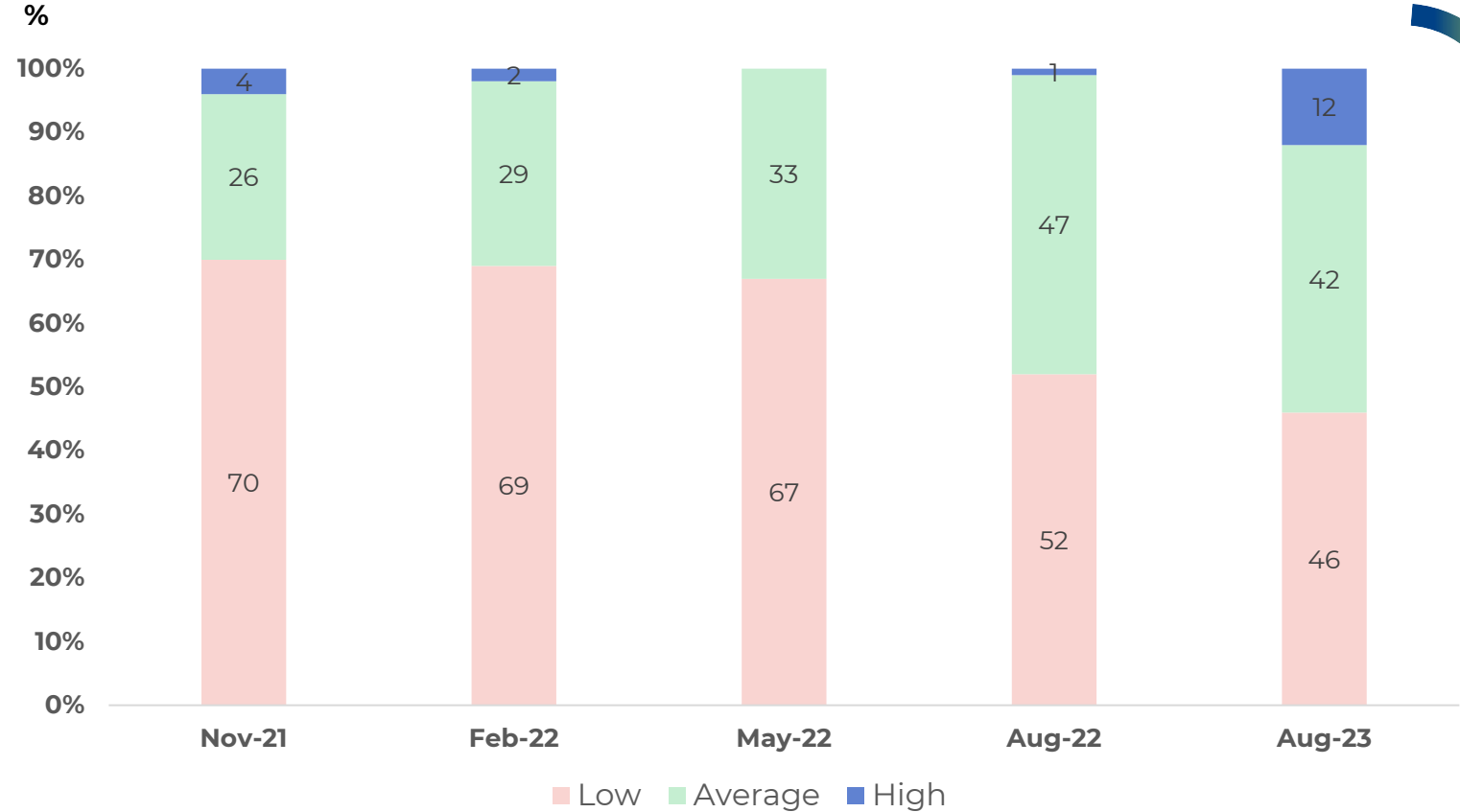
Used tractor inventory improving?



Q17: Do you think your current Used Tractor inventory levels are...; N=95 (n=4 removed due to not applicable)

Current used combine harvester inventory levels are...

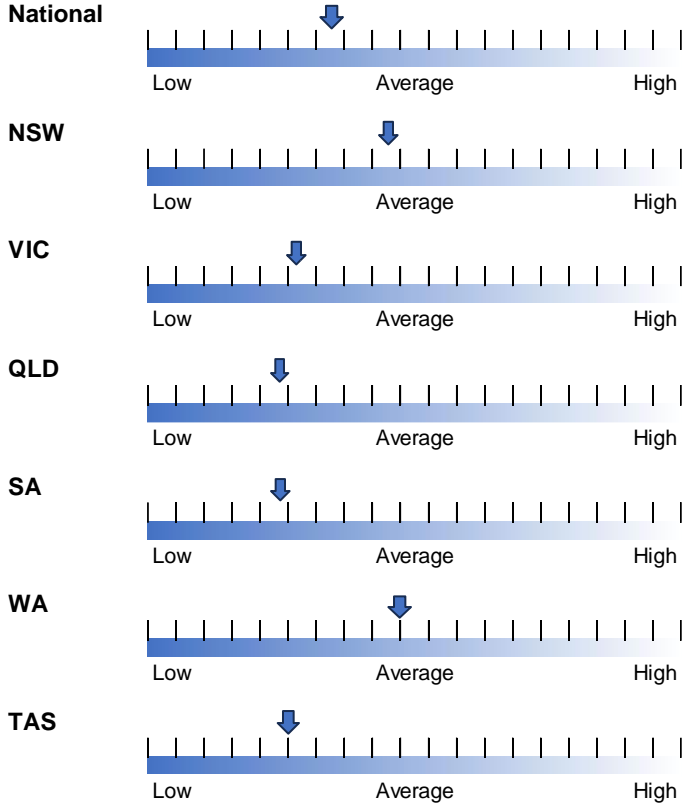
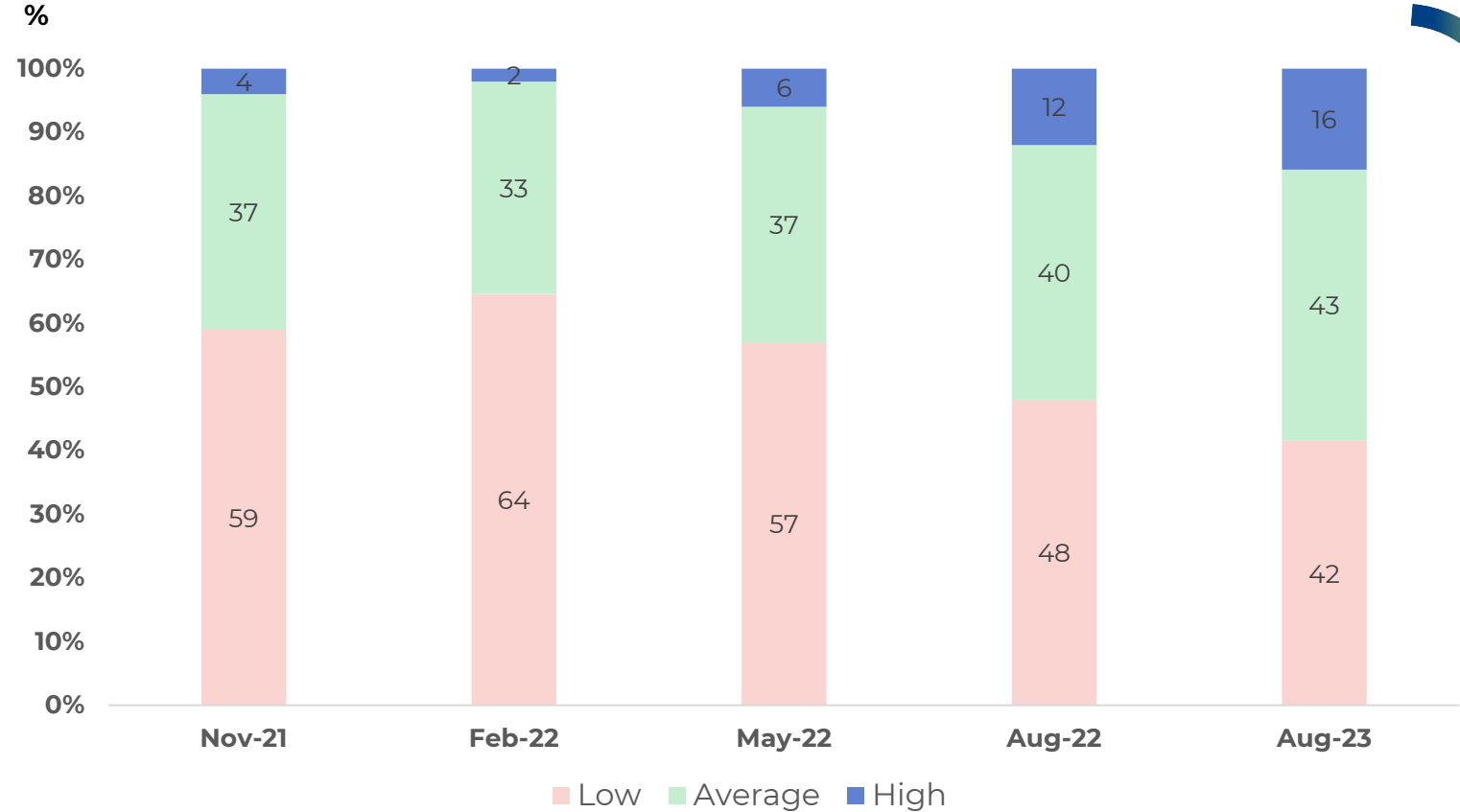
Used combine harvester inventory improving?



Q18: Do you think your current used combine harvester inventory levels are...; N=50 (n=45 was removed due to not applicable)

Current used baler and hay tools inventory levels are...

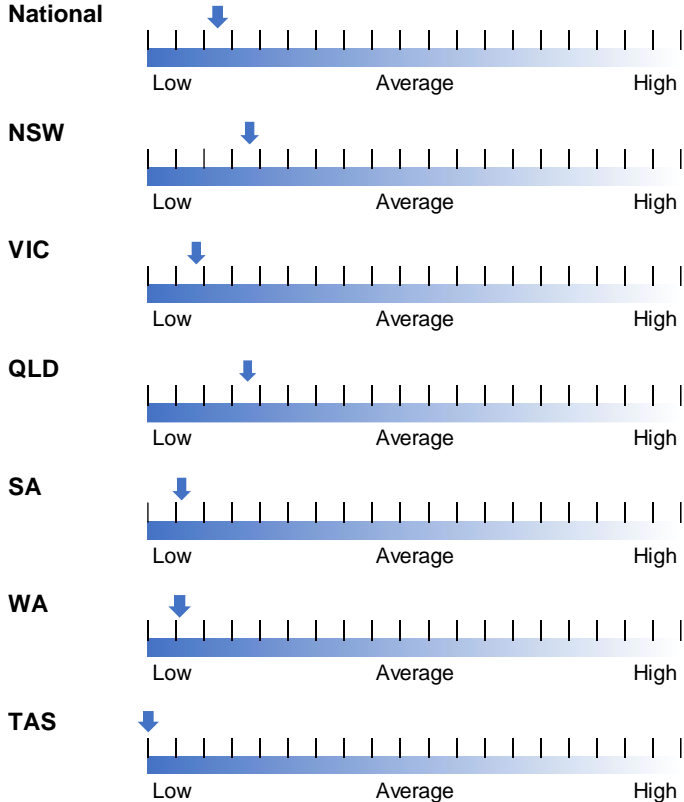
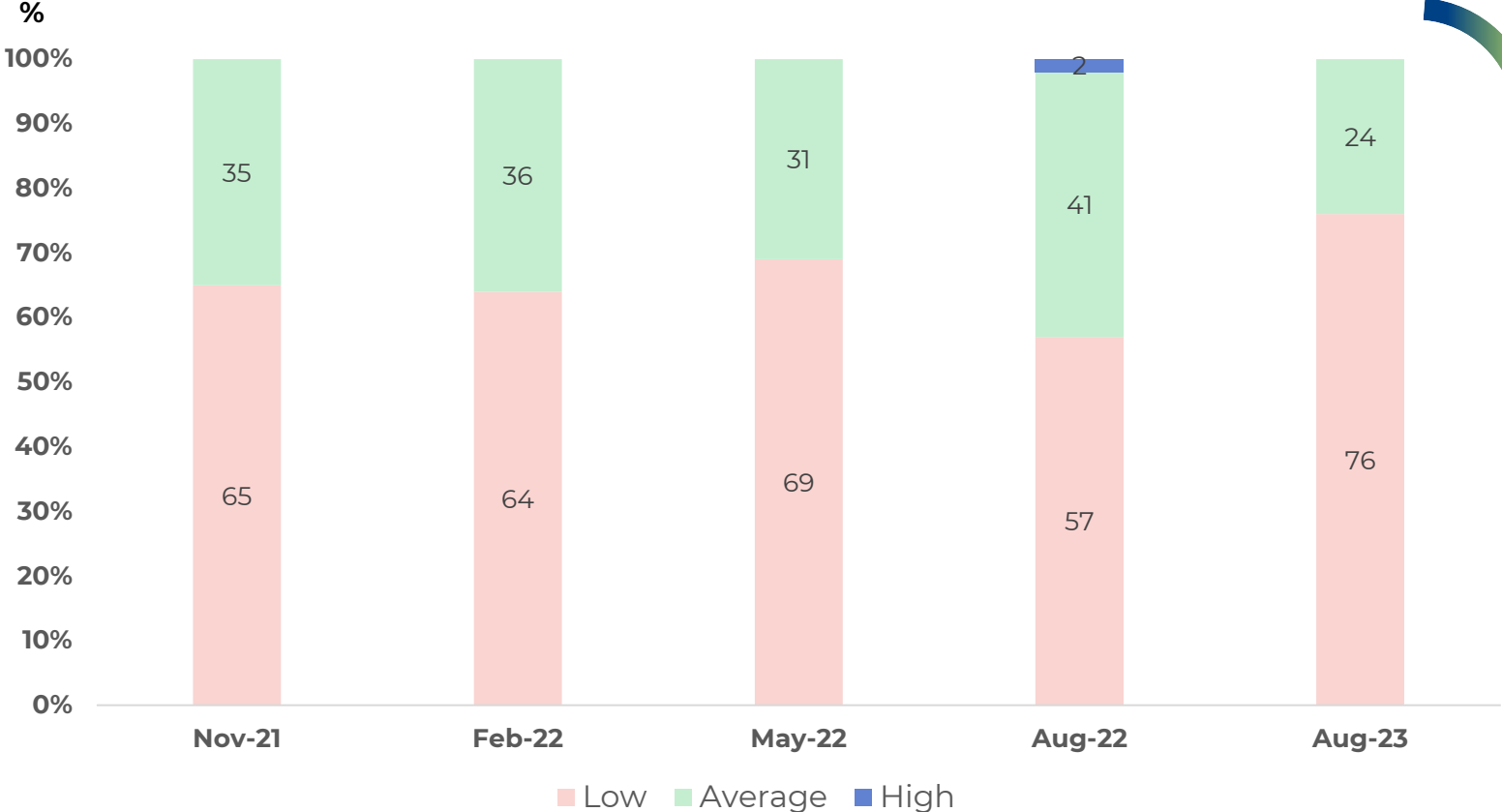
Low inventory levels improving?



Q19: Do you think your current used baler and hay tools inventory levels are...; N=77 (n=18 removed due to not applicable)

Current used SP sprayer inventory levels are...

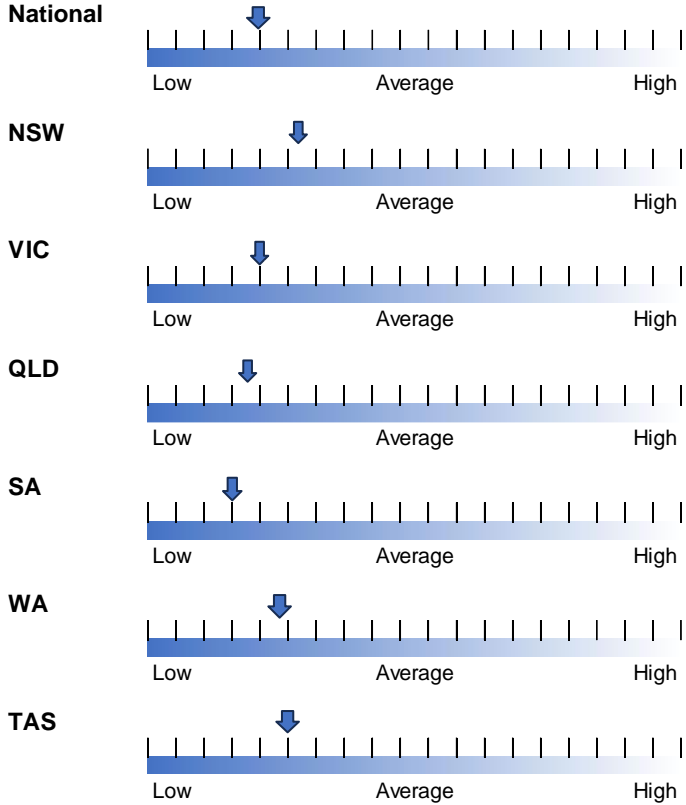
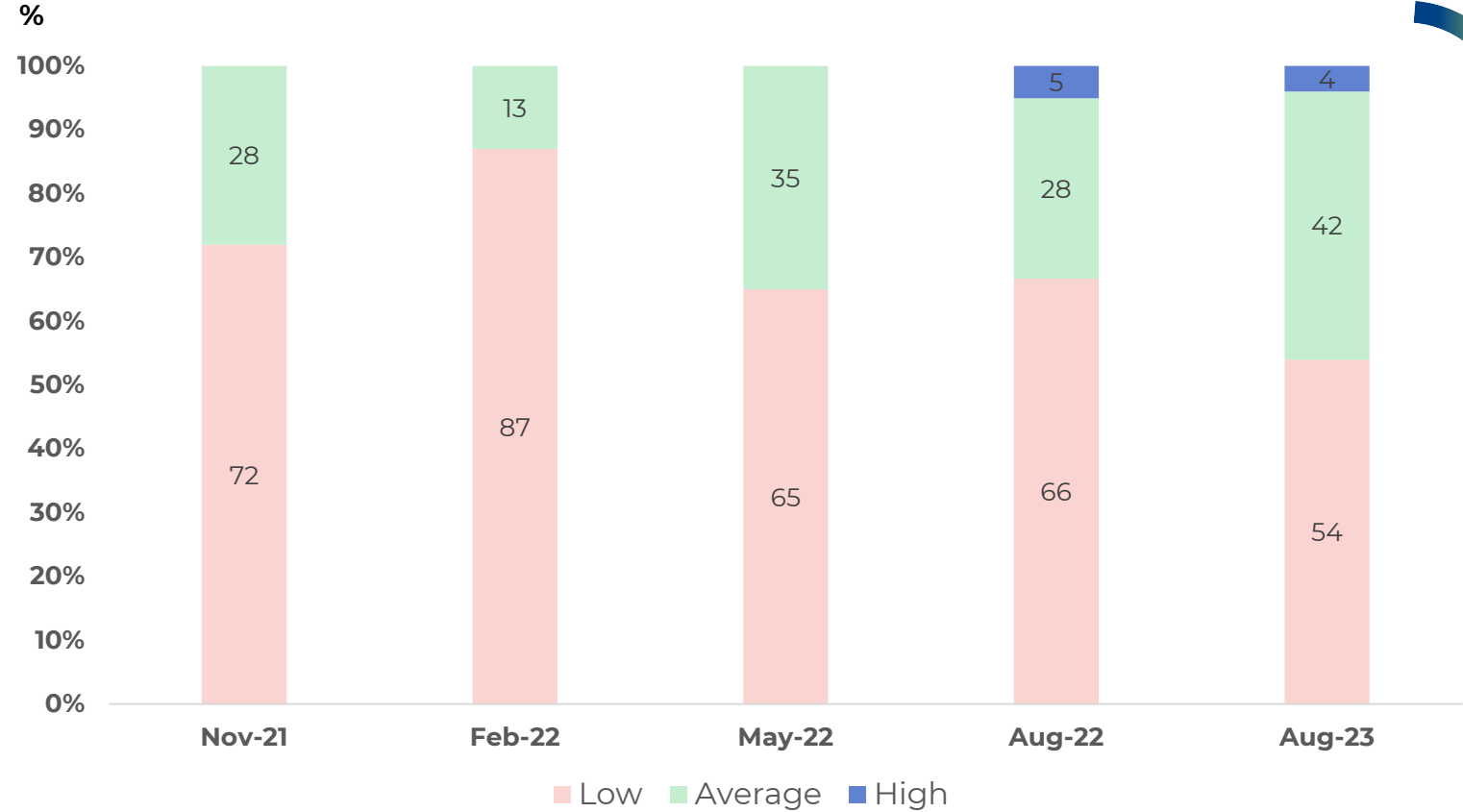
Low inventory levels



Q20: Do you think your current used SP sprayer inventory levels are...; N=55 (n=40 removed due to not applicable)

Current used implement inventory levels are...

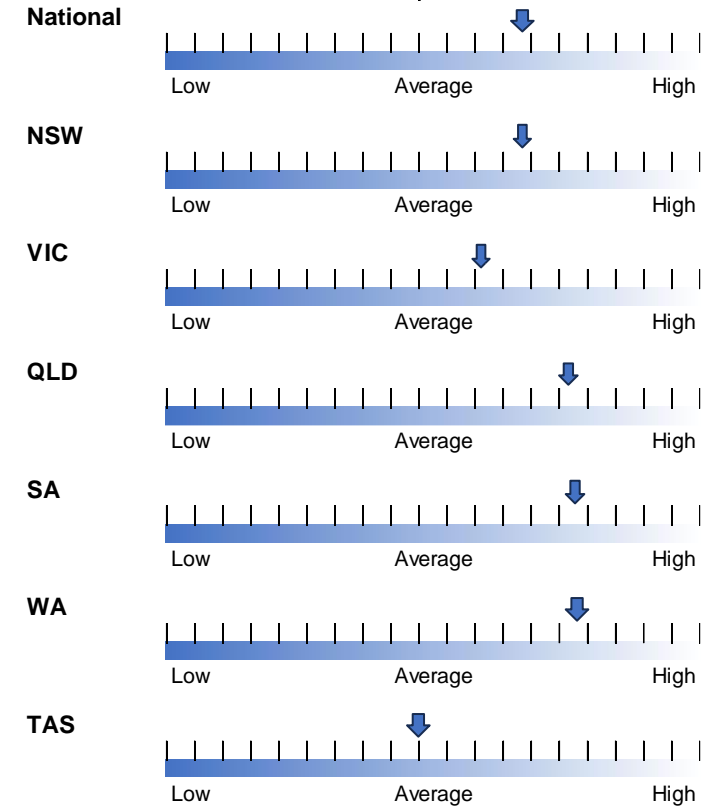
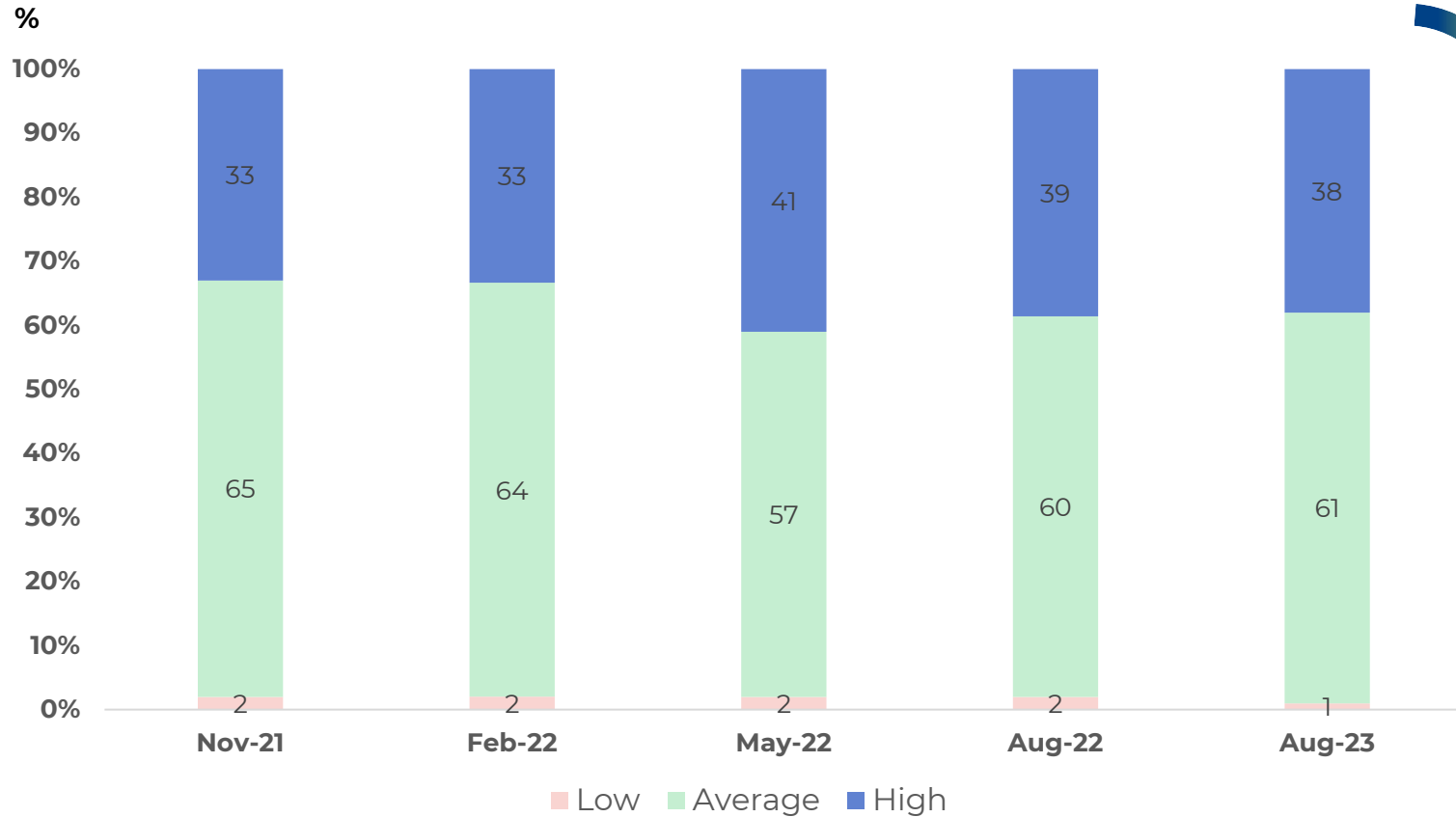
Implement inventory levels remain basically unchanged



Q21: Do you think your current used implement inventory levels are...; N=85 (n=10 removed due to not applicable)

Parts inventory level is...

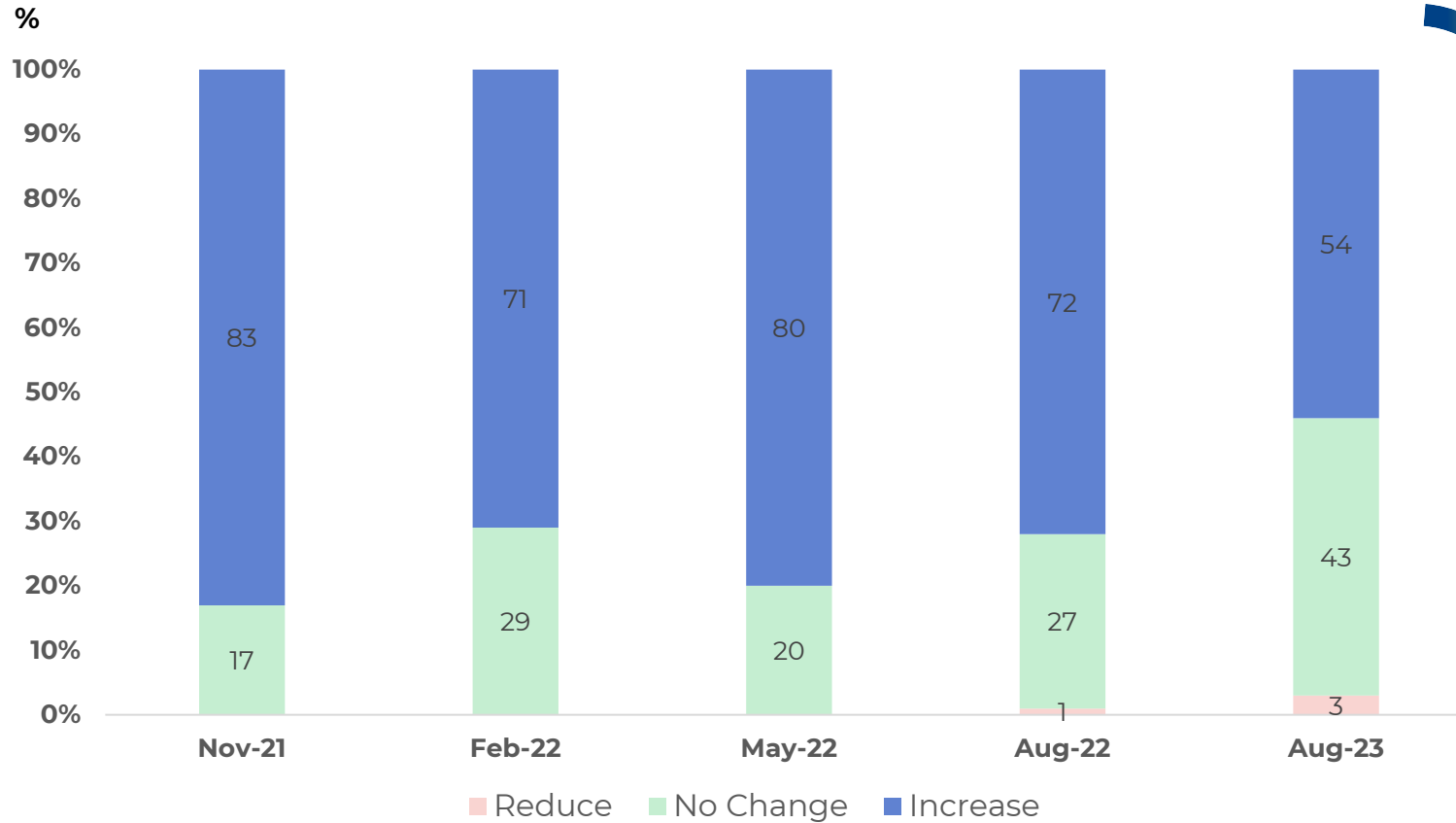
Little change in parts inventory



Q22: Do you consider your parts inventory to be...; N=95

Workforce plan

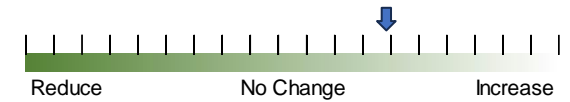
Workforce expansion remains likely



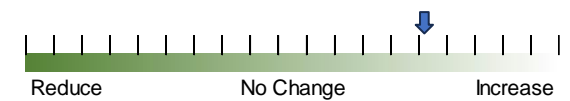
National



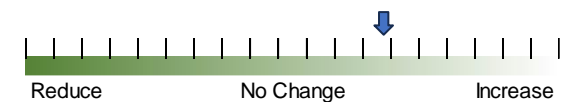
NSW



VIC



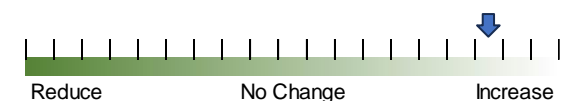
QLD



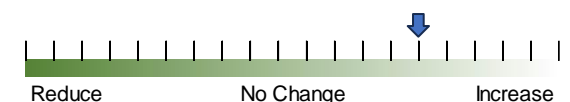
SA



WA



TAS



Q23: What are your plans regarding your workforce?; N=95