

Richard Anderson

Director, Market Research & Analysis, HDMA

HDMA Members Operations Update



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Introduction

- Presentation gives the perspective of the commercial vehicle supply sector, both on and off-highway, OE, OES and independent aftermarket
- Data is from the HDMA Pulse October 2020
 - Data being collected, report to be published this Friday, October 16th
 - **Preliminary data shown**, 33 responses so far
- Comparisons are made to:
 - HDMA Pulse September 2020 – Part 2
 - Published September 25, data collected September 15-24, 40 responses
 - HDMA Pulse September 2020
 - Published September 11, data collected September 7-10, 30 responses
 - HDMA Pulse August 2020
 - Published August 28, data collected August 24-27, 42 responses
- HDMA and MEMA coverage of COVID-19 can be found
 - <https://www.hdma.org/hdma-member-only-resources>
 - <https://www.memam.org/covid-19-coronavirus-resources-1>

← Current

← 3-weeks ago

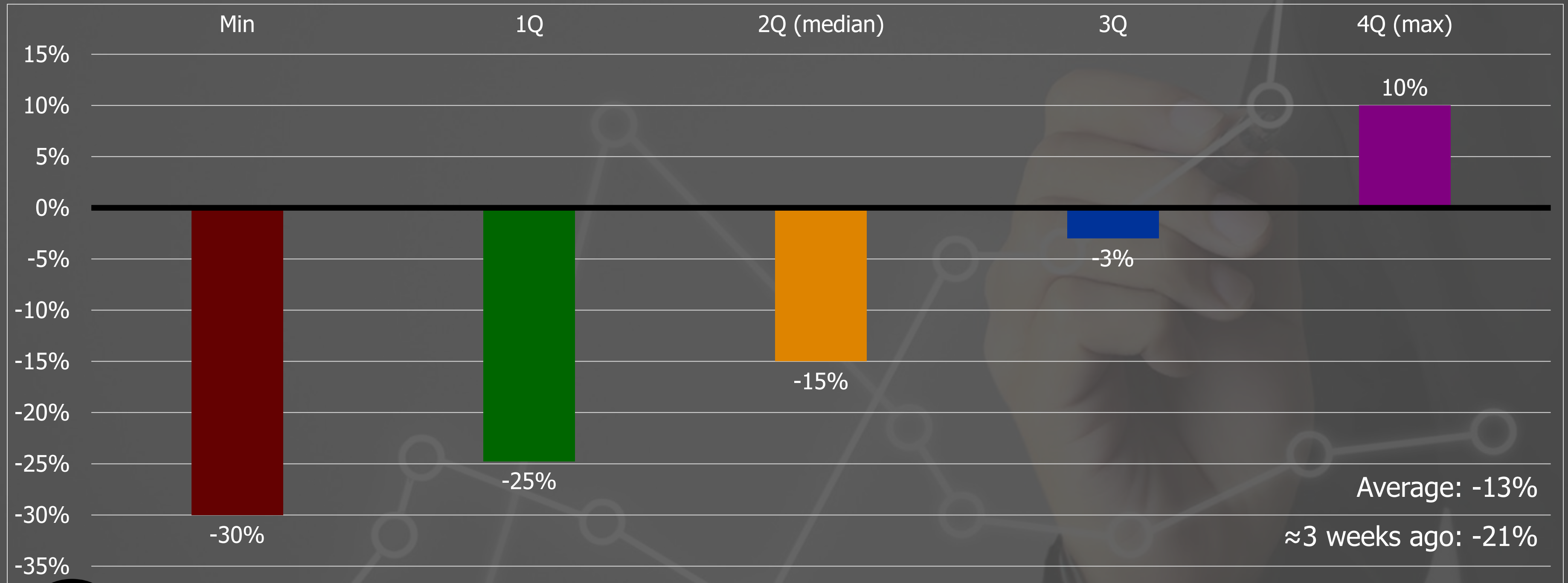
← 5-weeks ago

← 7-weeks ago



Current Outlook – Q4

What is your current USA & Canada Q4-2020 commercial vehicle business plan compared to Q4-2019?



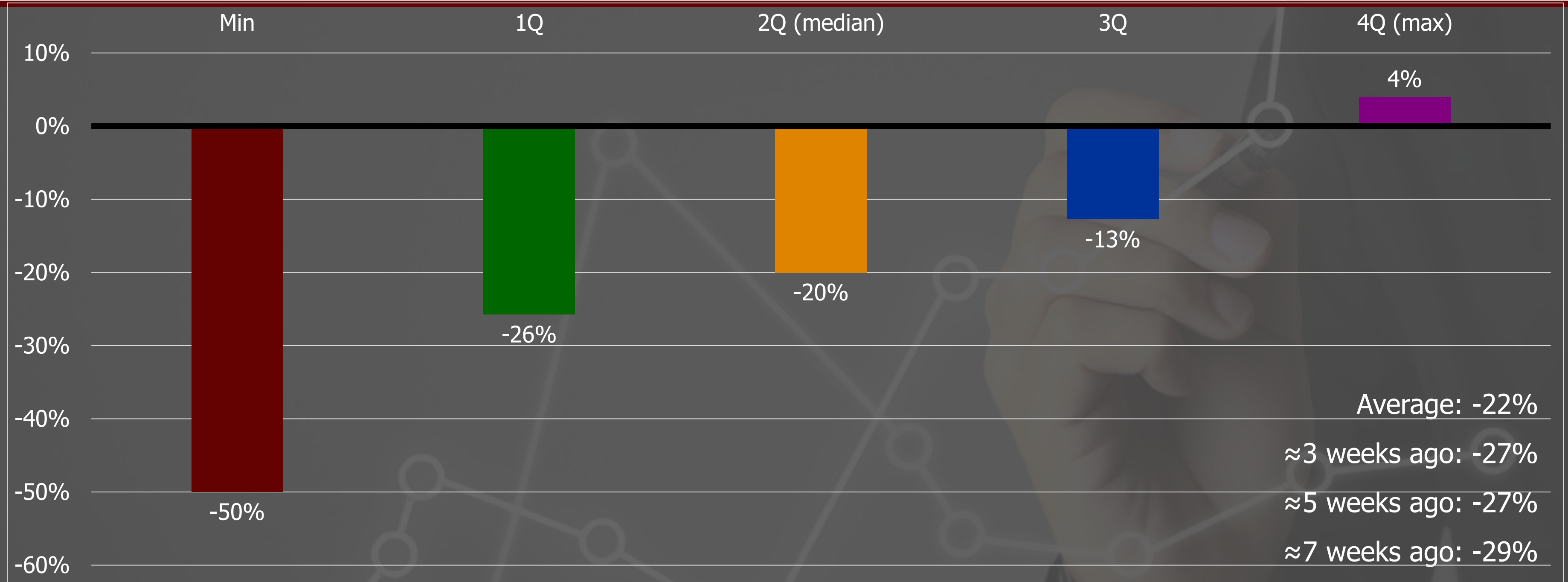
Source: HDMA Pulse October 2020

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Current Outlook – 2020

What is your current USA & Canada 2020 commercial vehicle business plan compared to 2019?



Source: HDMA Pulse October 2020

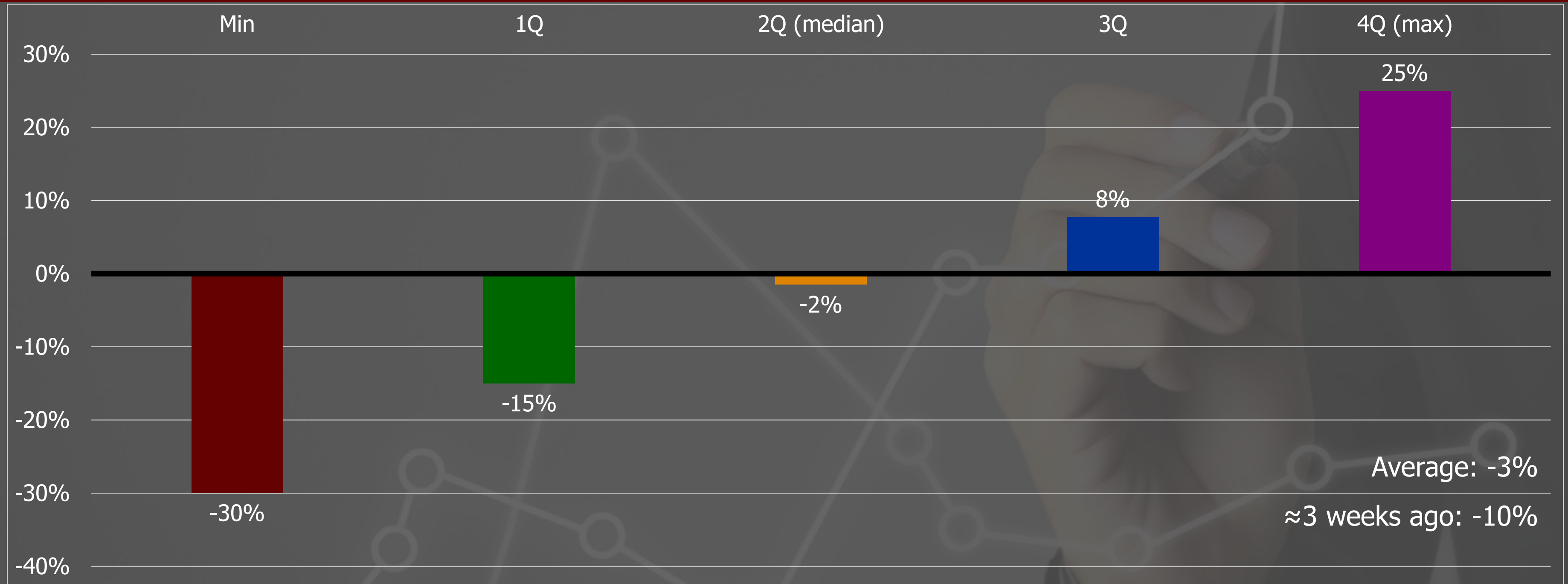


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Current Outlook – 2021

What is your current USA & Canada 2021 commercial vehicle business plan compared to 2019?



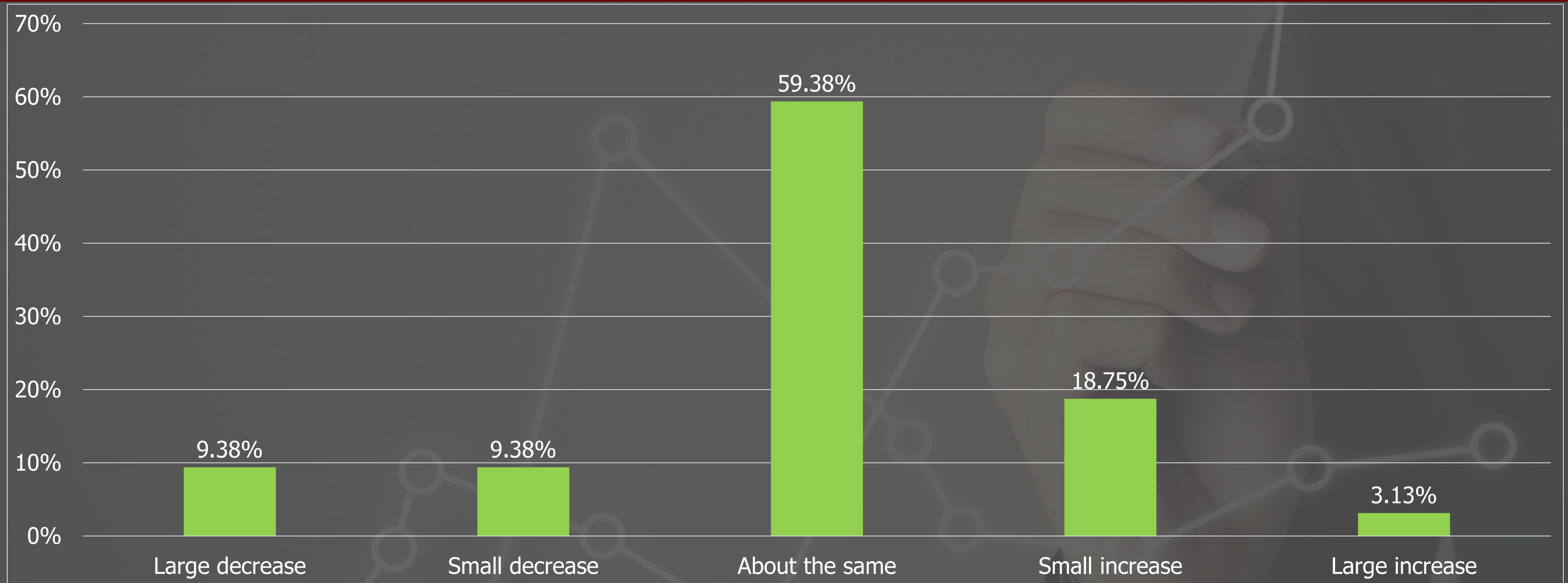
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Supplier Infection Status

Compared to this time last month, what is the level of COVID infections across all your North America staff?



Source: HDMA Pulse October 2020

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Instant Poll

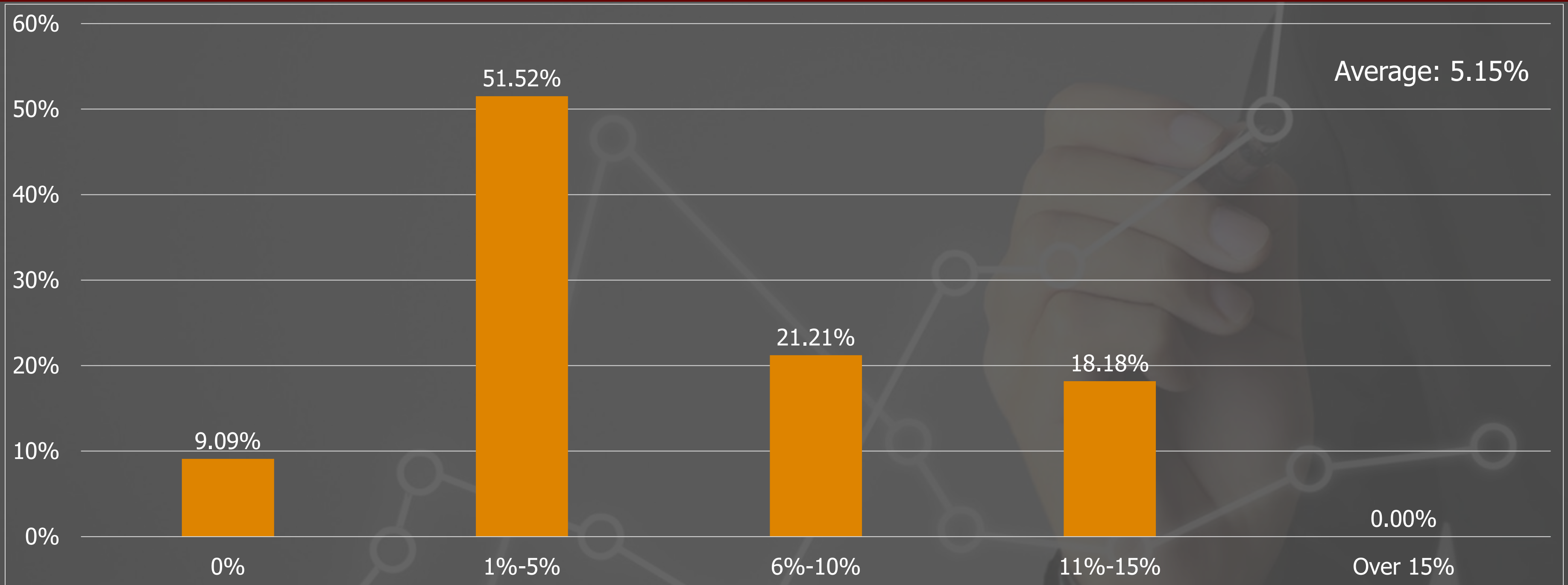
- What is your expectation for staff infection rates during Q4?
 - Significant increase as temperatures drop and holiday gatherings increase – **12%**
 - Slight increase as the quarter progresses, following current national trend – **38%**
 - No meaningful changes – **42%**
 - Slight decrease as prevention steps continue to take hold – **9%**
 - Significant decrease – **0%**

October 14 HDMA Pulse Webinar with IHS Markit instant responses shown. All industry, not suppliers only. Responses may not equal 100% due to rounding.



Supplier Absenteeism Rates

What are the approximate absentee rates for your production facilities in the U.S.?



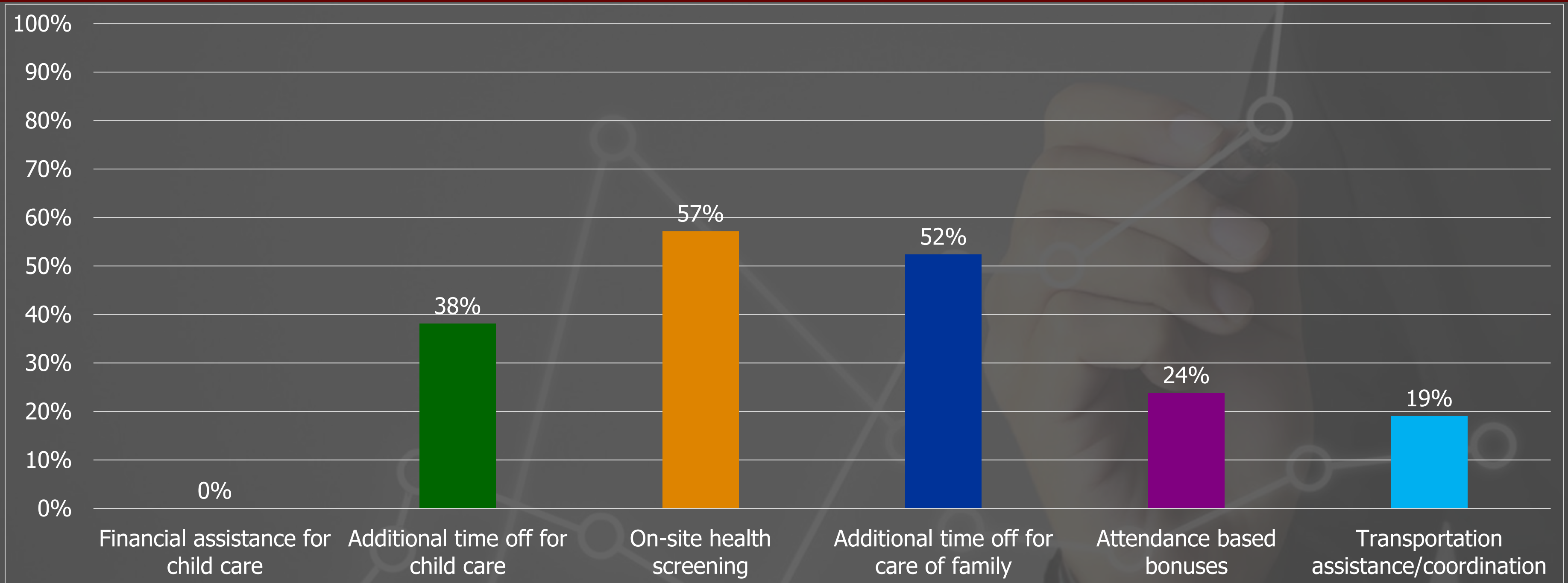
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Supplier Absenteeism Prevention

What steps has your company taken to reduce absentee staff?
(select all that apply)



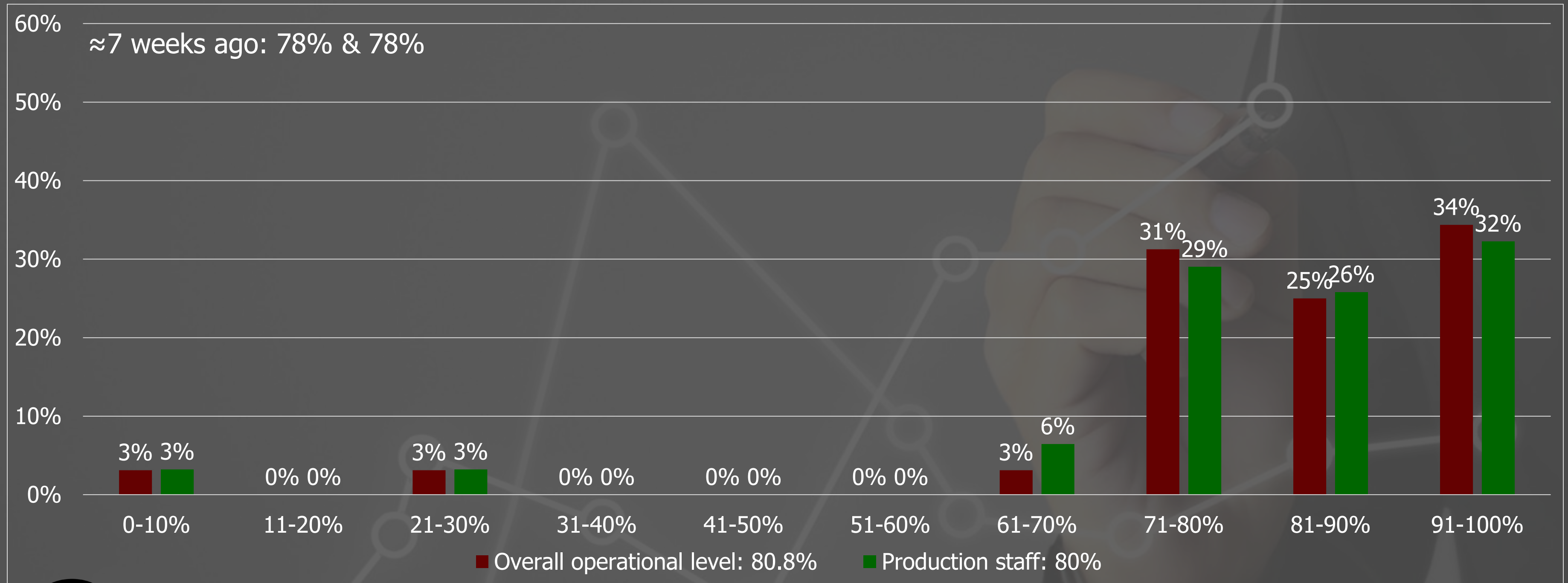
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Supplier Operations – Overall & Production

Please chose the closest answer for your company's current operational level by function or department as compared to start of the year (pre COVID-19 levels).



Source: HDMA Pulse October 2020

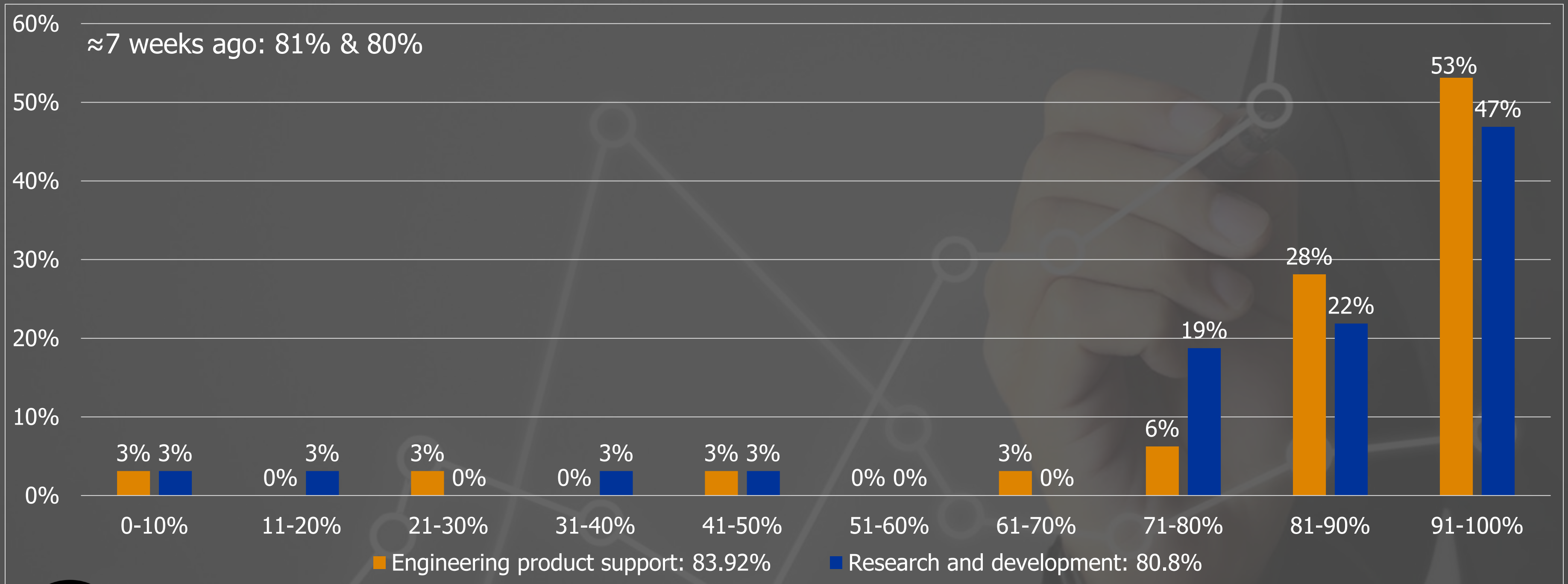


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Supplier Operations – Engineering & R&D

Please chose the closest answer for your company's current operational level by function or department as compared to start of the year (pre COVID-19 levels).



Source: HDMA Pulse October 2020

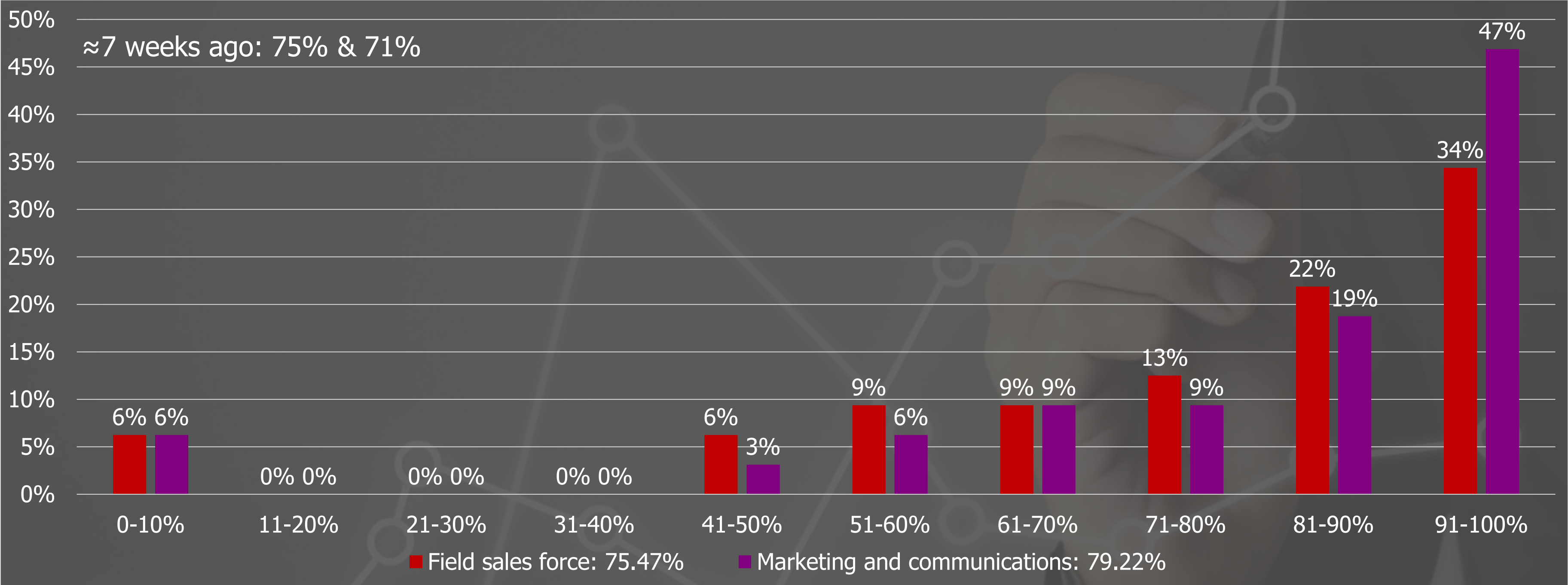


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Supplier Operations – Sales & MarComm

Please chose the closest answer for your company's current operational level by function or department as compared to start of the year (pre COVID-19 levels).



Source: HDMA Pulse October 2020

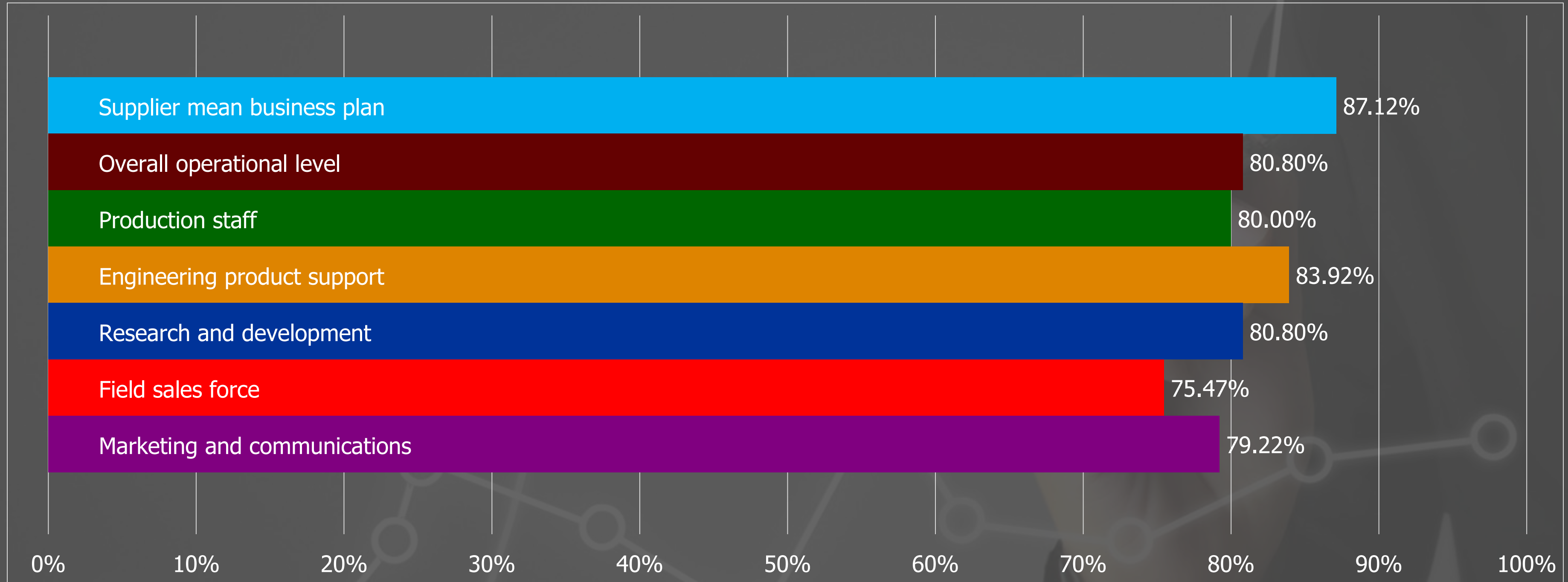


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Supplier Operations

Please chose the closest answer for your company's current operational level by function or department as compared to start of the year (pre COVID-19 levels).



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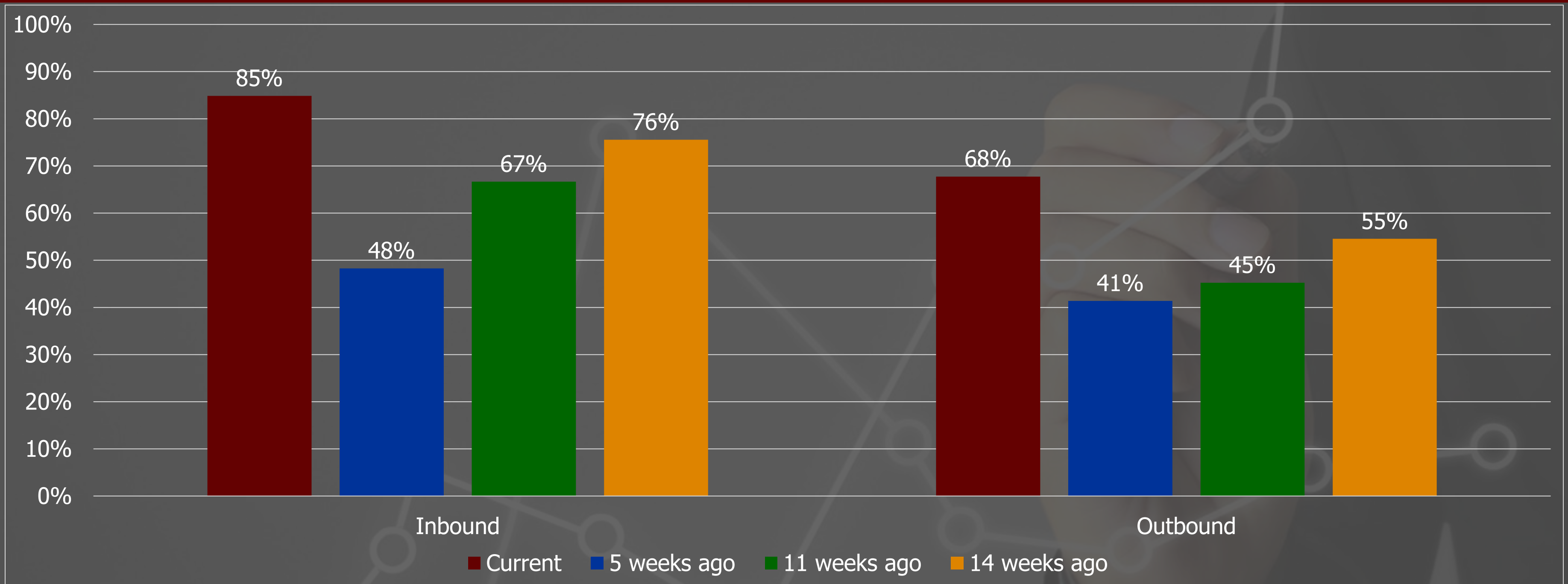


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Percent of Suppliers Experiencing Delays

What percent of your in/outbound materials and semi-finished goods are delayed beyond the usual amount?



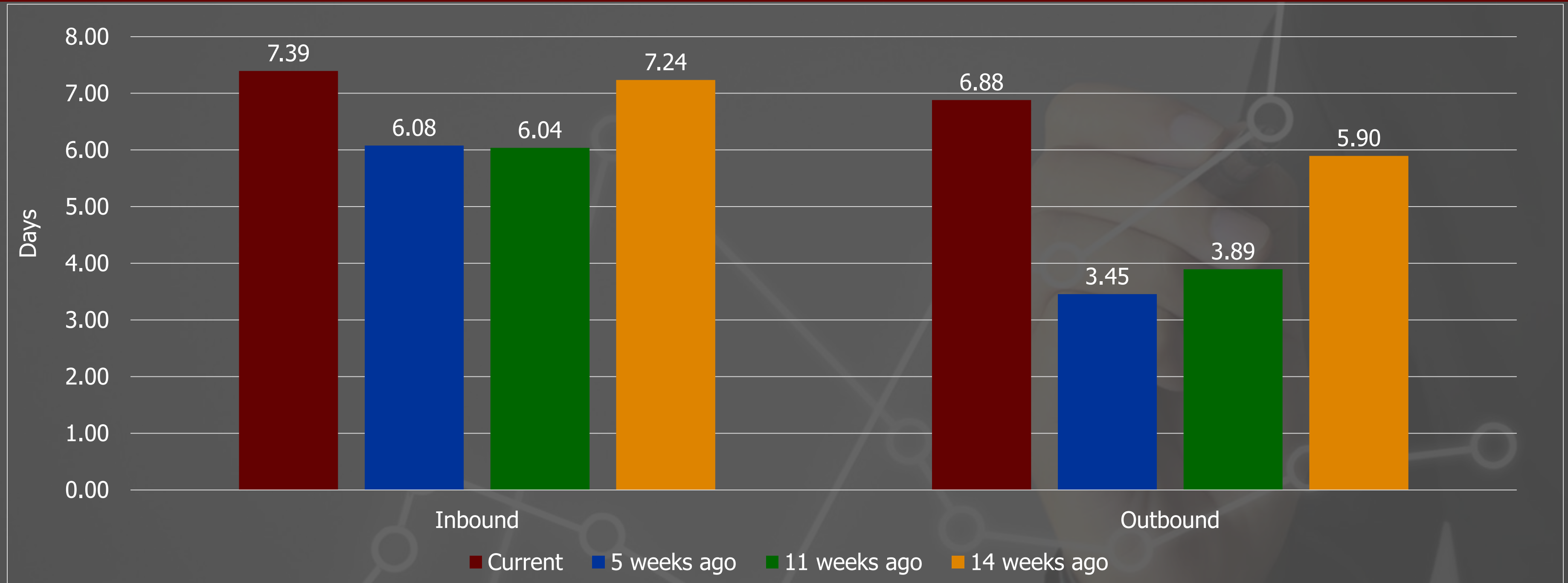
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Supplier Shipping Delays

Approximately how long are in/outbound materials and semi-finished materials delayed?



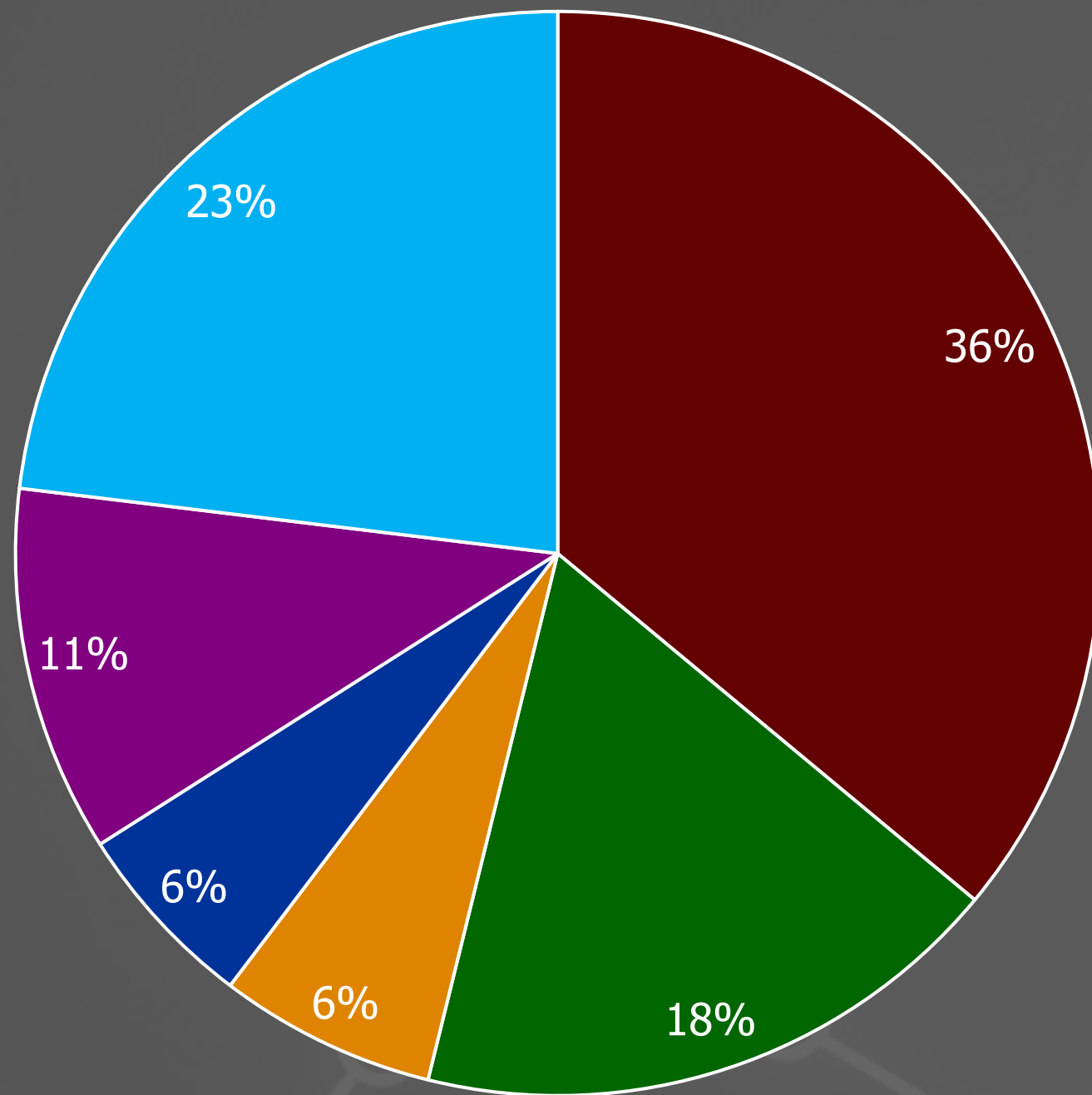
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Supplier Risks

Please choose the most significant three (3)
in regards to the challenge they present to restarting normal business operations?



- Accuracy of production and demand forecasts
- Raw material and semi-finished goods procurement
- Closure mandates of own facilities
- Customer liquidity
- Inbound/outbound shipper availability and cost
- Labor force readiness and availability

Composite score shown

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HDMA Staff Contacts

HDMA Staff

Timothy Kraus
President & COO
Office: (919) 406-8835
Mobile: (919) 724-1735
tkraus@hdma.org
[LinkedIn](#)

Beth Barkovich
Executive Director, Membership
Development
Office: (919) 406-8831
Mobile: (919) 599-8772
bbarkovich@hdma.org
[LinkedIn](#)

Katelyn Litalien
Director, Marketing & Member Services
(919) 406-8848
klitalien@hdma.org

Ashley McLeod
Manager, Meetings & Member Services
(919) 406-8803
amcleod@hdma.org

Caterina Pontoriero
Manager, Marketing Communications &
Member Engagement
(919) 406-8848
cpontoriero@hdma.org

Danielle Kaspar
Manager, Councils & Member Engagement
(919) 406-8847
dkaspar@hdma.mema.org

Richard Anderson
Director, Market Research
(919) 406-8875
randerson@hdma.org

MEMA Staff

Bill Long
President & CEO
blong@mema.org

Ann Wilson
Senior Vice President, Government Affairs
awilson@mema.org

Catherine Boland
Vice President, Legislative Affairs
cboland@mema.org

Leigh Merino – RAC
Executive Director, Regulatory Affairs
lmerino@mema.org

Laurie Holmes
Senior Director, Environmental Policy
lholmes@mema.org

Brian Daugherty
CTO, MEMA (for HDMA and OESA)
bdaugherty@mema.org

