




# *Press- Conference*



AGRITECHNICA, 13th November 2023

# *Agenda*

-  Branch key-data
-  Dealer Satisfaction Index (tractor brands)
-  Trends in the sector

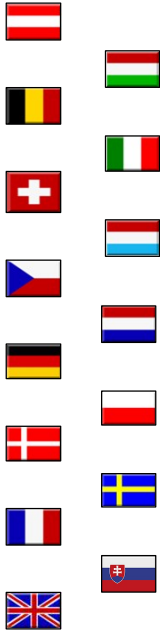


# *Branch key-data*

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Ag-dealers and service-companies are an important player in rural area all over Europe

# Members of CLIMMAR: 15



Companies  
**15 657**

Employees  
**185 200**

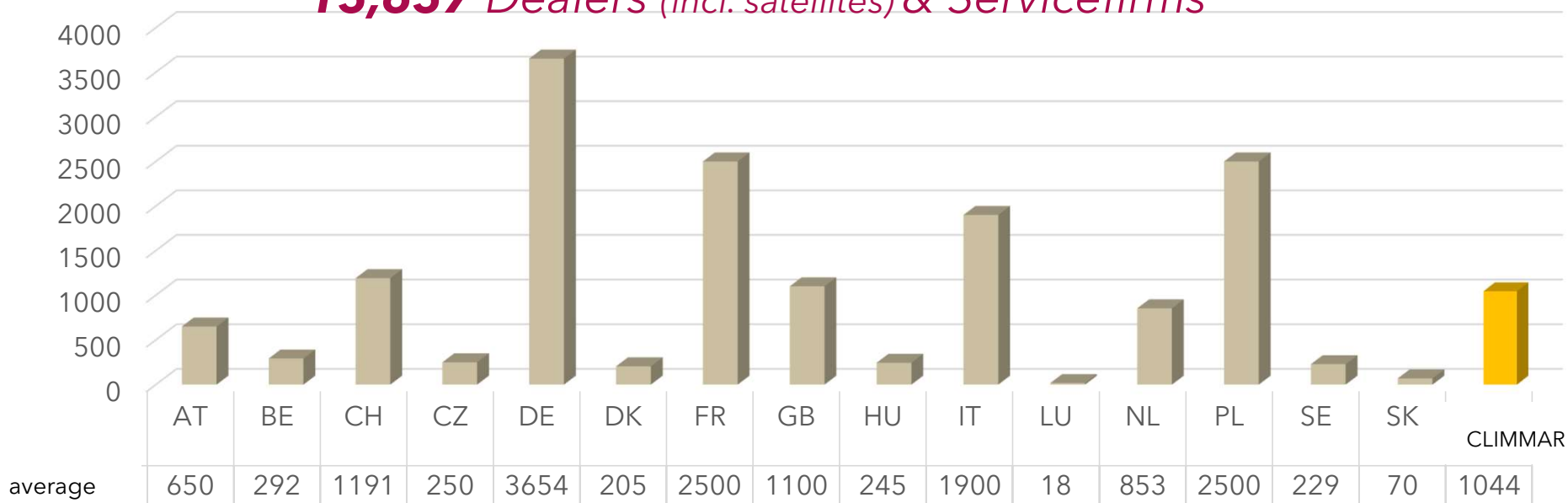
Turnover  
**51,900 Mrd. €**



United in defending the interests of distribution in the face of increasingly European and even global decisions

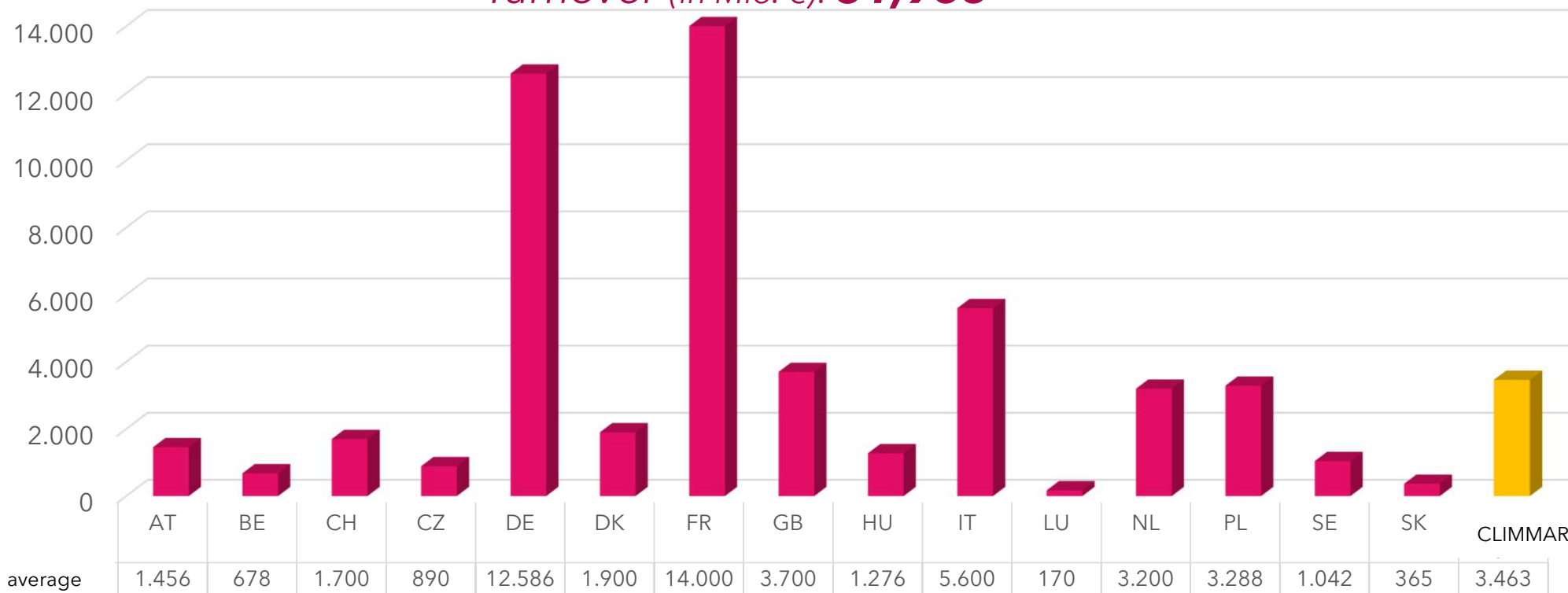
# Number of companies per country in CLIMMAR-members

**15,657** Dealers (incl. satellites) & Servicefirms

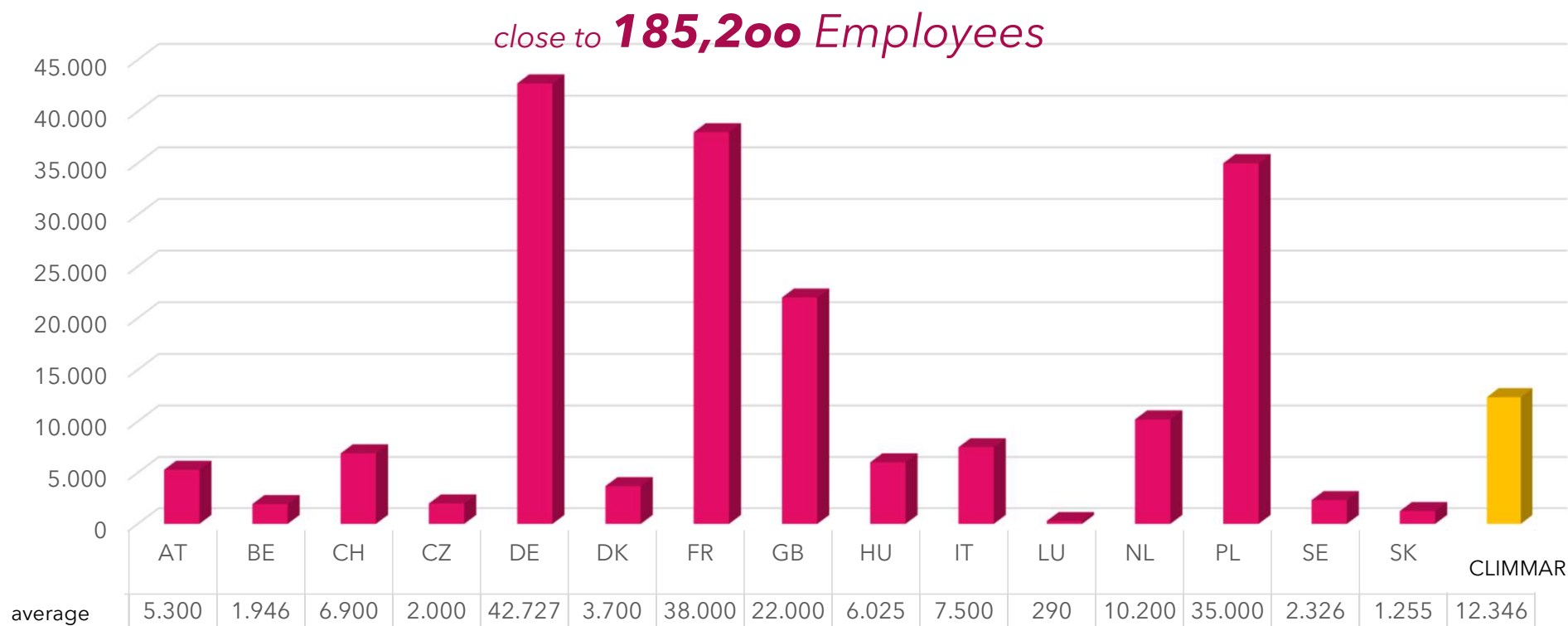


# Turnover per country in CLIMMAR-members

Turnover (in Mio. €): **51,900**

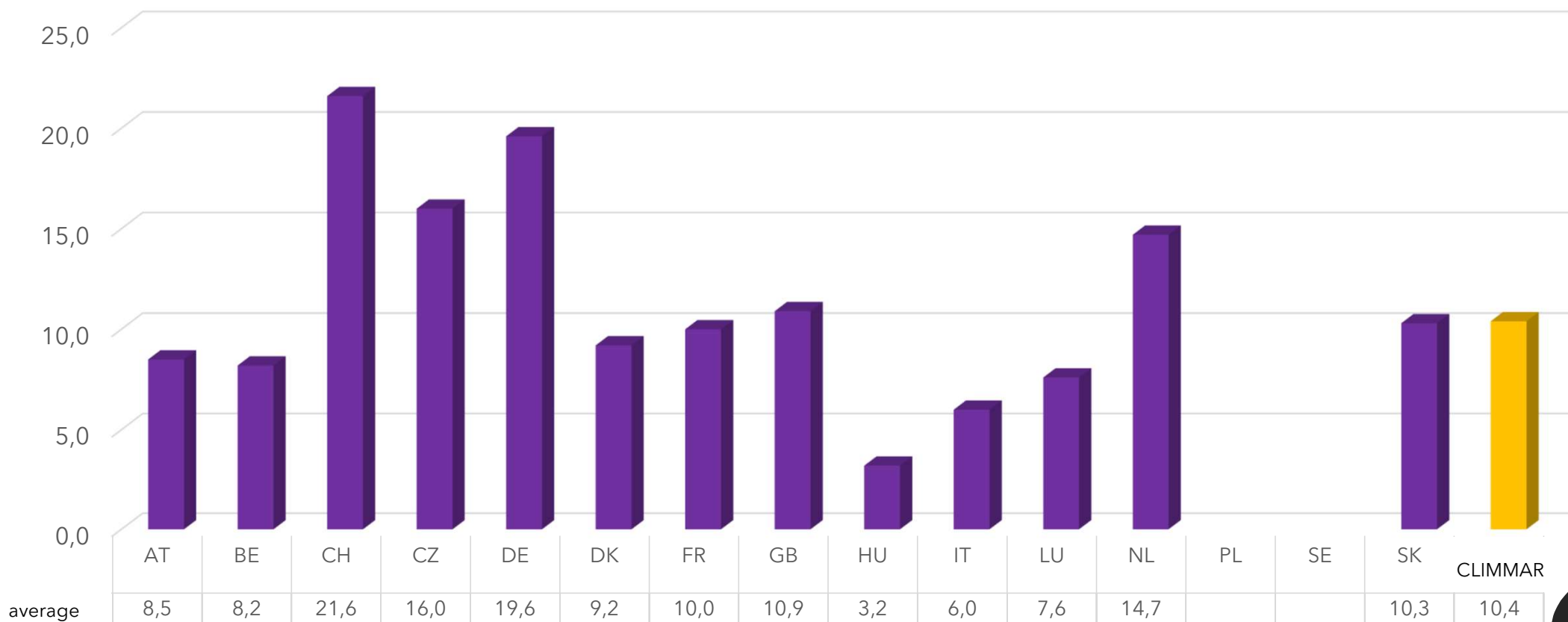


# Employees per country in CLIMMAR-members



# Apprentices per country in CLIMMAR-members

Relations - % Apprentices (of Employees): **10.4**



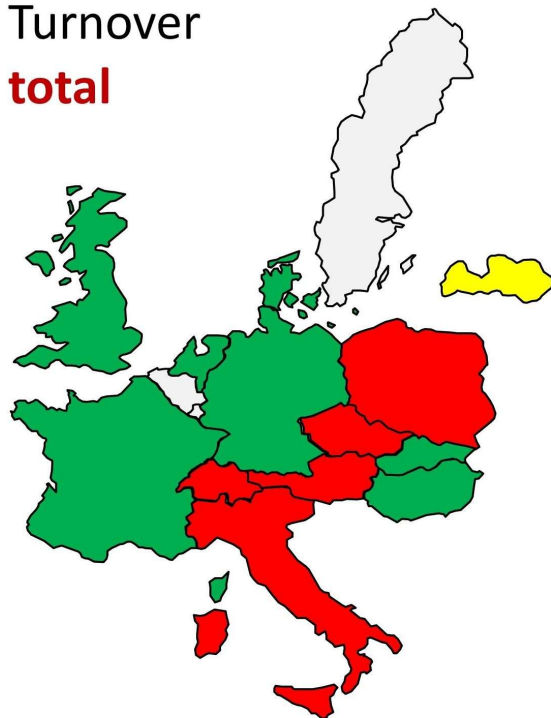
Source: CLIMMAR



# Development of turnover in first half 2023

(compared with the same period one year before)

Turnover  
**total**



Turnover  
**new equipment**



Turnover  
**workshop**



Turnover  
**spareparts**



 increased	 decreased
 stable	 no response





# Turnover-development and -expectations

## *Development* of turnover in the first half of 2023



## *Expectations* of turnover for next half of 2023



-  decrease
-  equal
-  increase
-  no answer

# Development and expectations

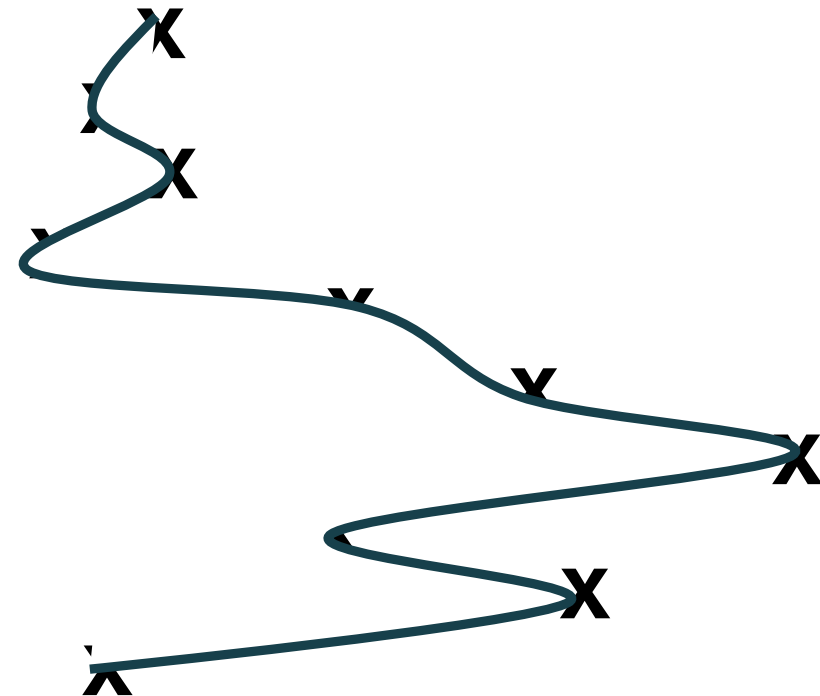
**Comparison** to same period last year: **January - June 2023**

- (minus / worse)

= (equal)

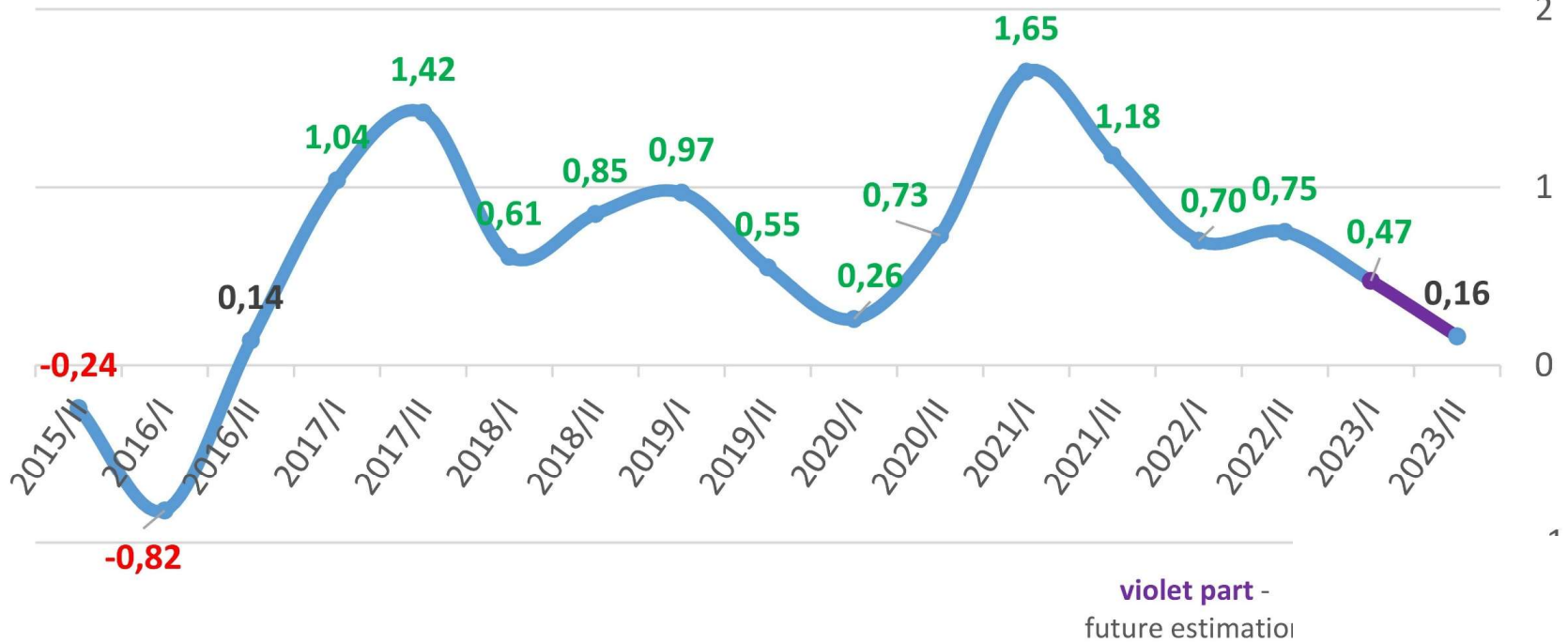
+ (plus / better)

- A. Turnover total
  - A.I Turnover Machinery
    - A.I.1 New machinery
    - A.I.2 Second hand
  - A.II Turnover Workshop
  - A.III Turnover Spare Parts
- B. Costs
- C. Employees
- E. Stock
- F. Investments



## CLIMMAR-Index:

(half-year-trendindex for ag-dealers and -service all over Europe /  
 halbjähriger Konjunkturwert für Landmaschinenhandel und -service in ganz Europa)



3

2

1

0

-1

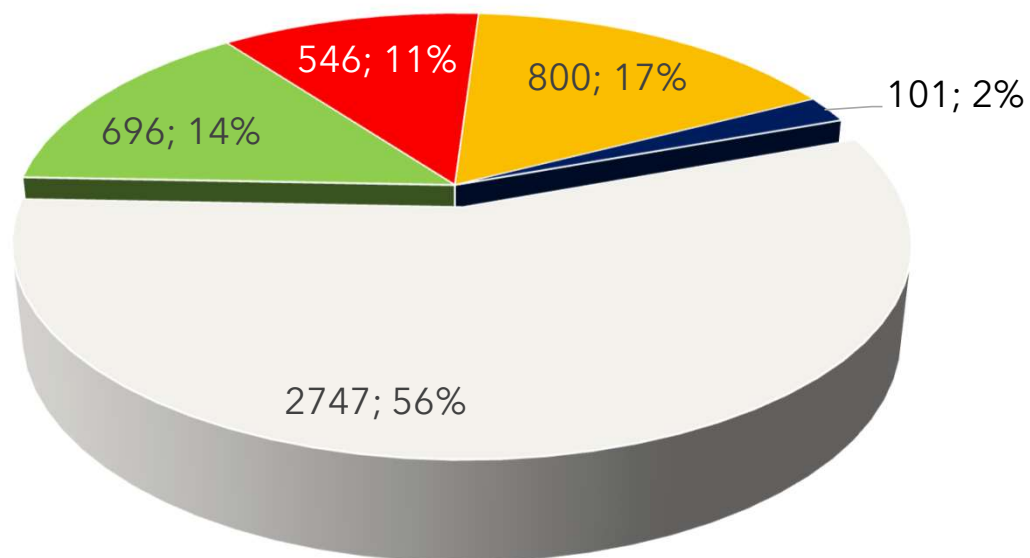
-2

-3

# Turnover-structure of an average dealers-company in Europe

## turnover-structure

of the average CLIMMAR-dealer  
(1,000 € ; % of turnover total)



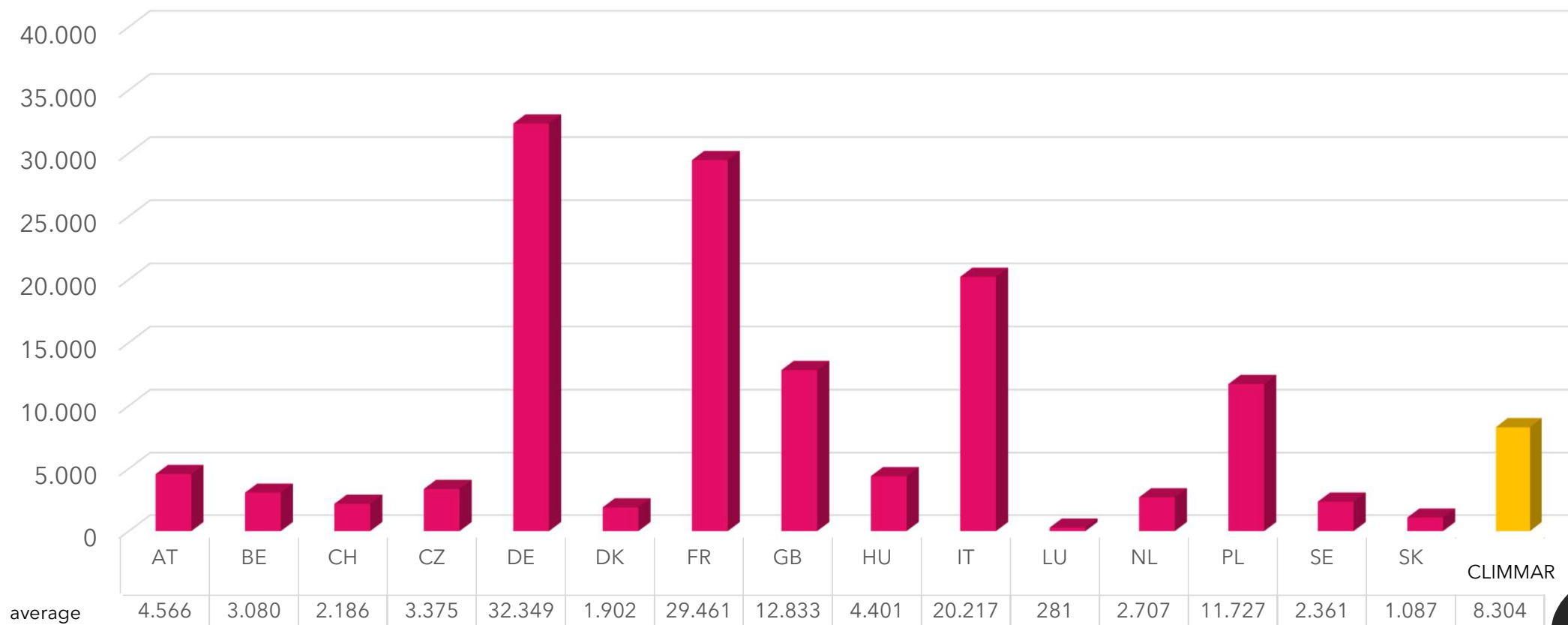
■ new equipm. ■ second hand ■ workshop ■ parts ■ externals

total:  
4,889,000 €/comp.

Source: CLIMMAR

# Immatriculation of tractors per country in CLIMMAR

Tractor Sales: **132,500** units



Source: CLIMMAR



# *Dealer Satisfaction Index 2023*

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## DSI 2023



Start : April 4<sup>th</sup> 2023  
End : May 31<sup>th</sup> 2023



11  
countries  
included

2 more :  
Luxemburg and Sweden

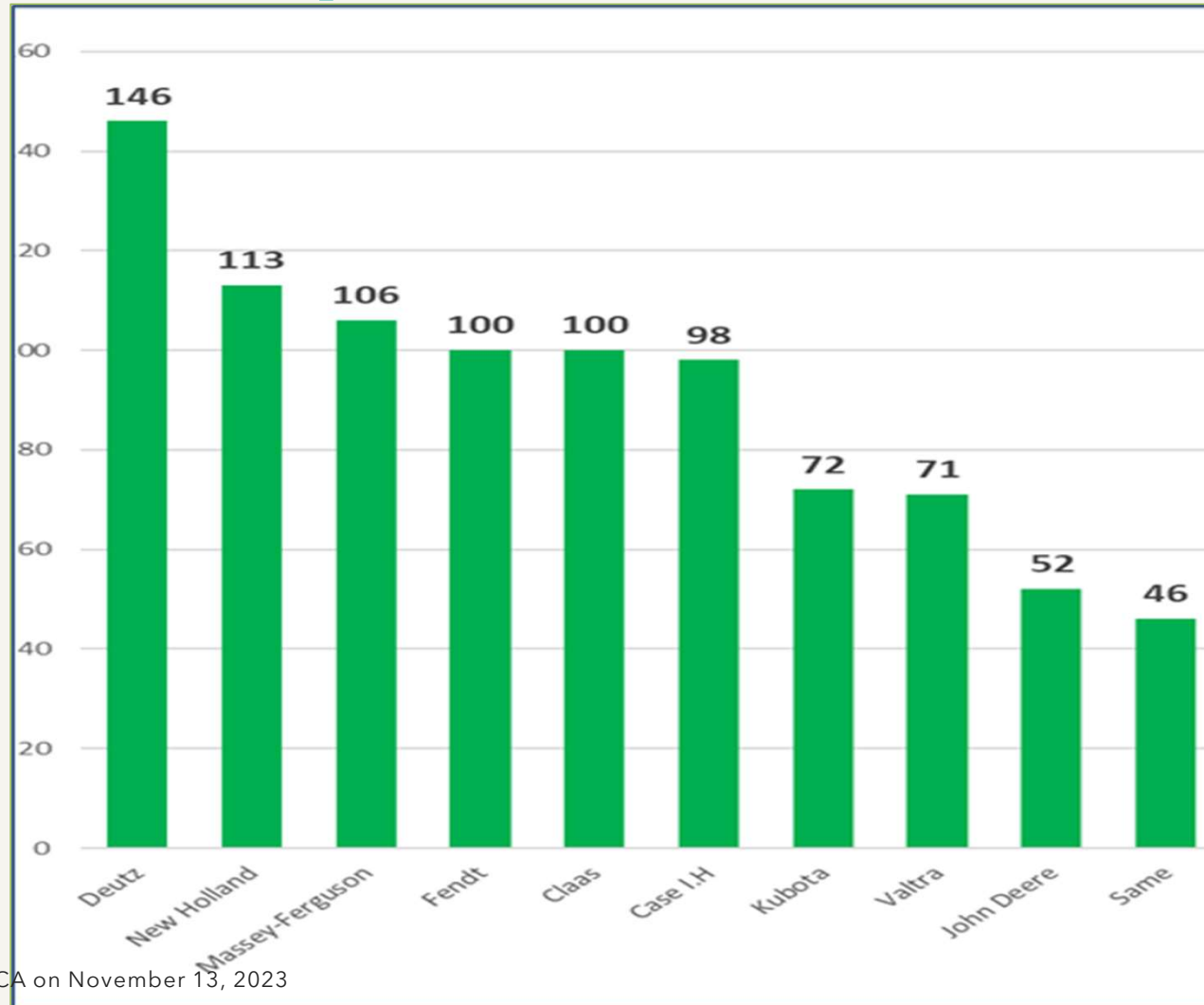


## Survey addressed per country

Country	Addressed 2023	Addressed 2022	2023/2022	
France	450	453	-1 %	⬇️
Poland	116	125	- 7 %	⬇️
Belgium	234	331	- 29 %	⬇️
Italia	1484	1484		=
United Kingdom	360	393	-8 %	⬇️
Germany	642	654	-2 %	⬇️
Hungary	33	50	- 32 %	⬇️
Denmark	83	83		=
Netherlands	287	290		=
Luxembourg	10			
Sweden	62			
<b>TOTAL</b>	<b>3761</b>	<b>3863</b>	<b>- 2,5 %</b>	<b>⬇️</b>

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## Number of answers per brand



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## Overall analysis



The gap between the brand that obtained the highest overall average and the one that obtained the lowest was 4.1 in 2022. In 2023 the gap is only 1.6



All the European distributors who took part in the survey pointed to the difficulty of obtaining financing for equipment stocks from manufacturers and the interest rates charged by captive banks.

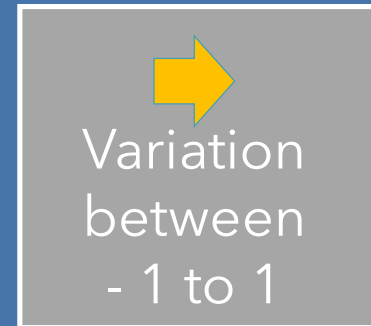
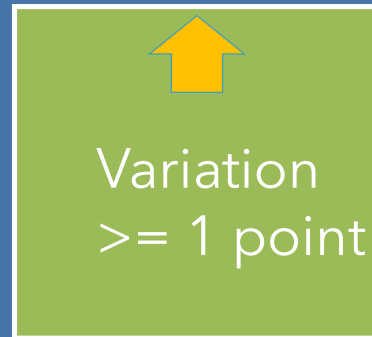
*Result by  
Brand*



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## Legend : reading the diagram for each brand

# 61 questions



10 answers and  
more



10 answers and  
more



## Overall average all brands

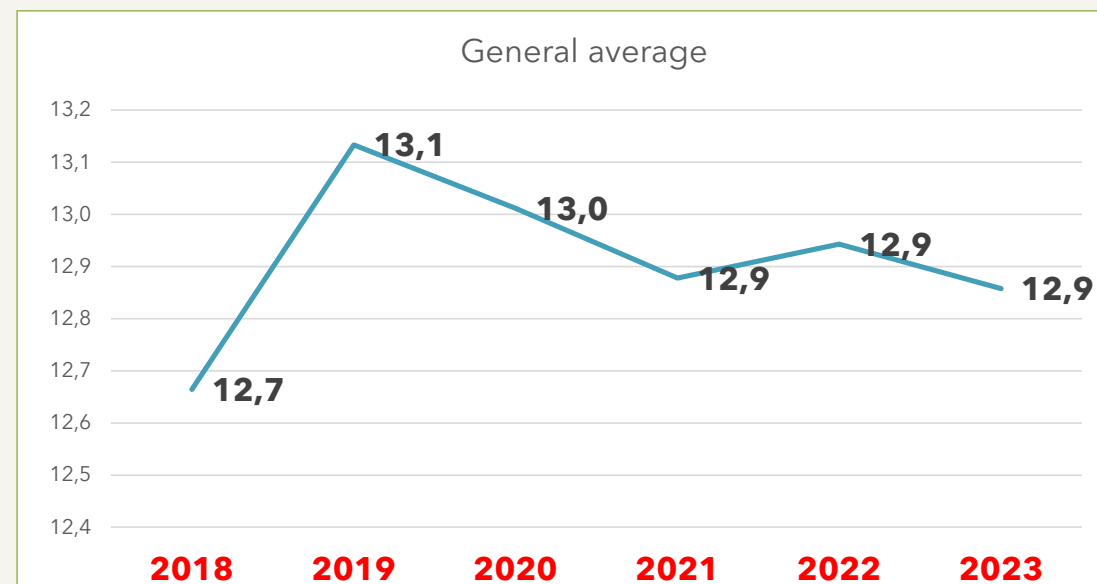


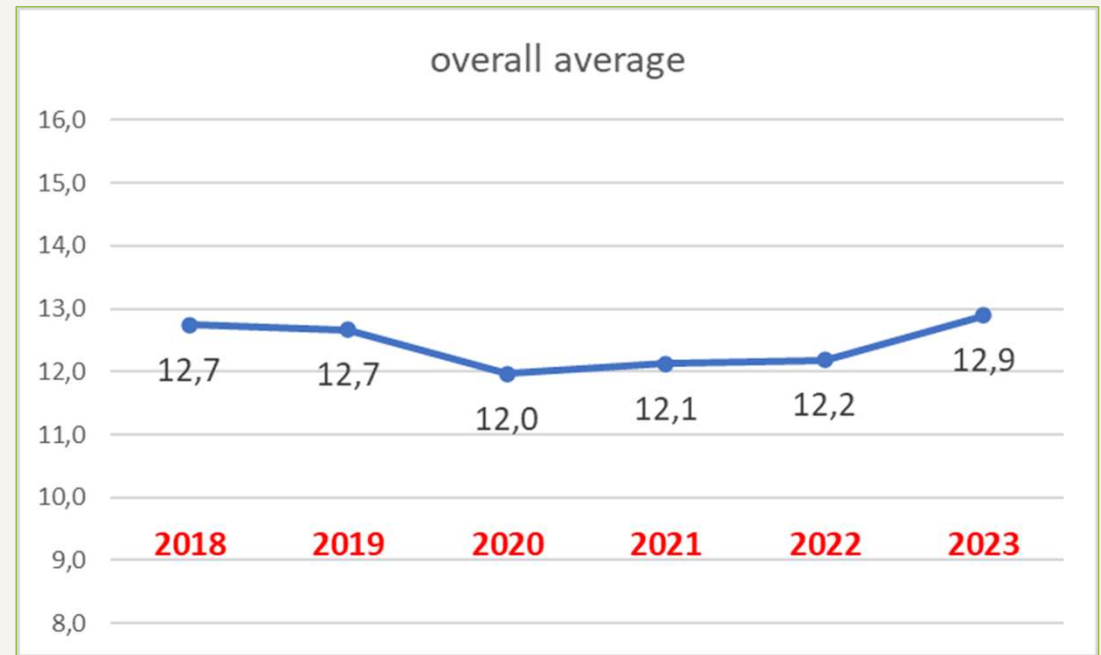
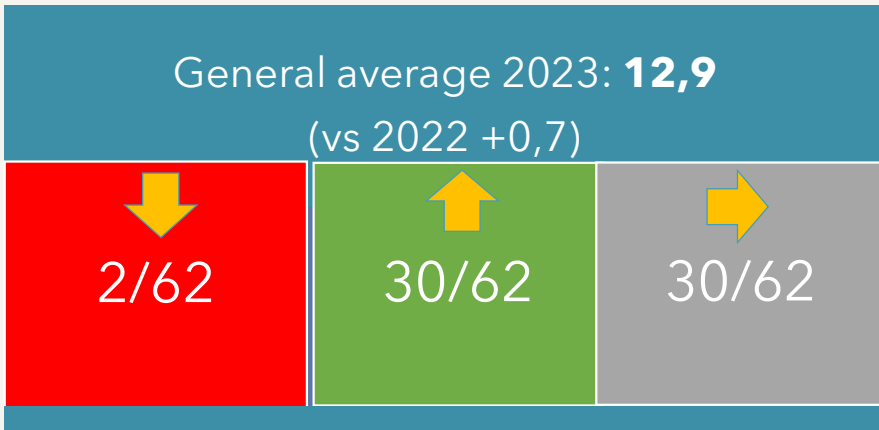


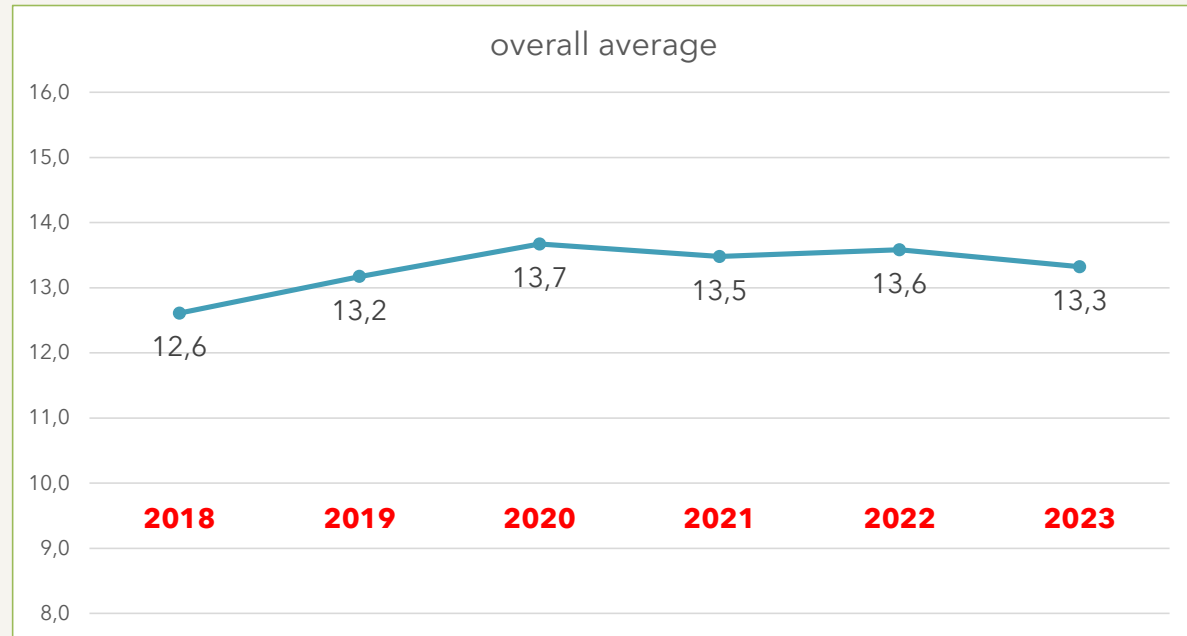
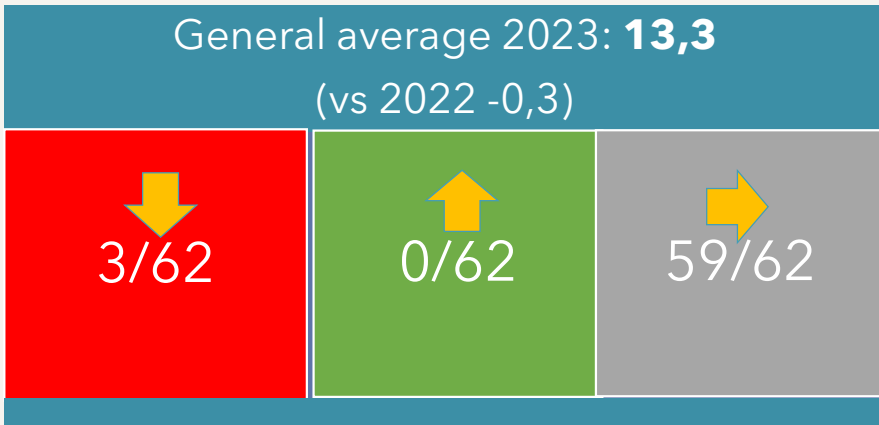
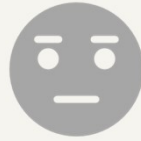










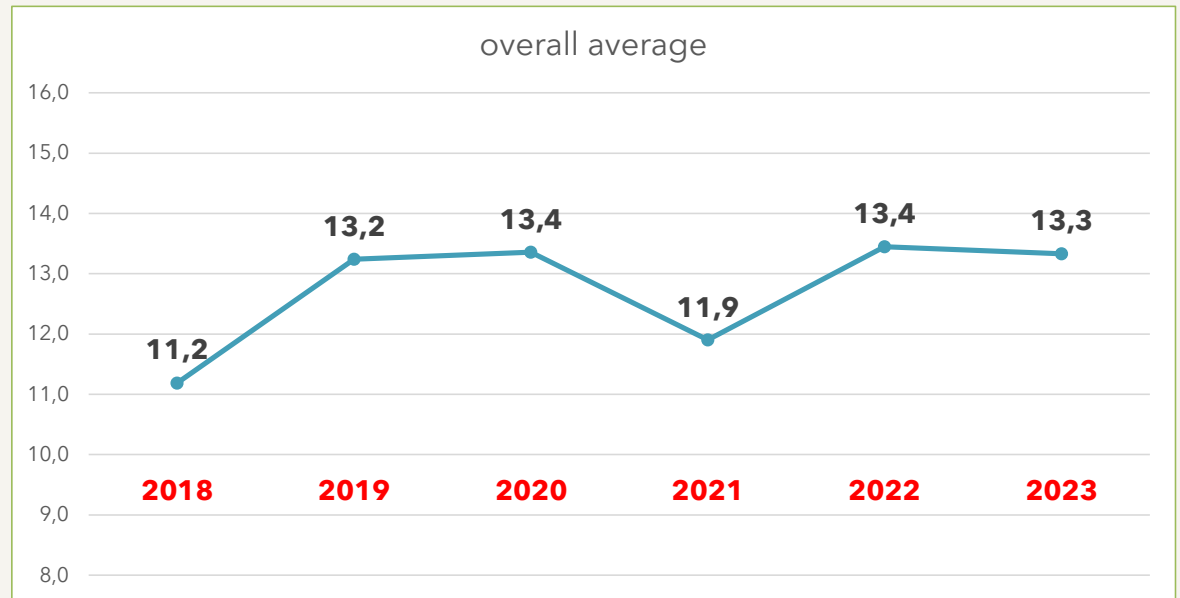


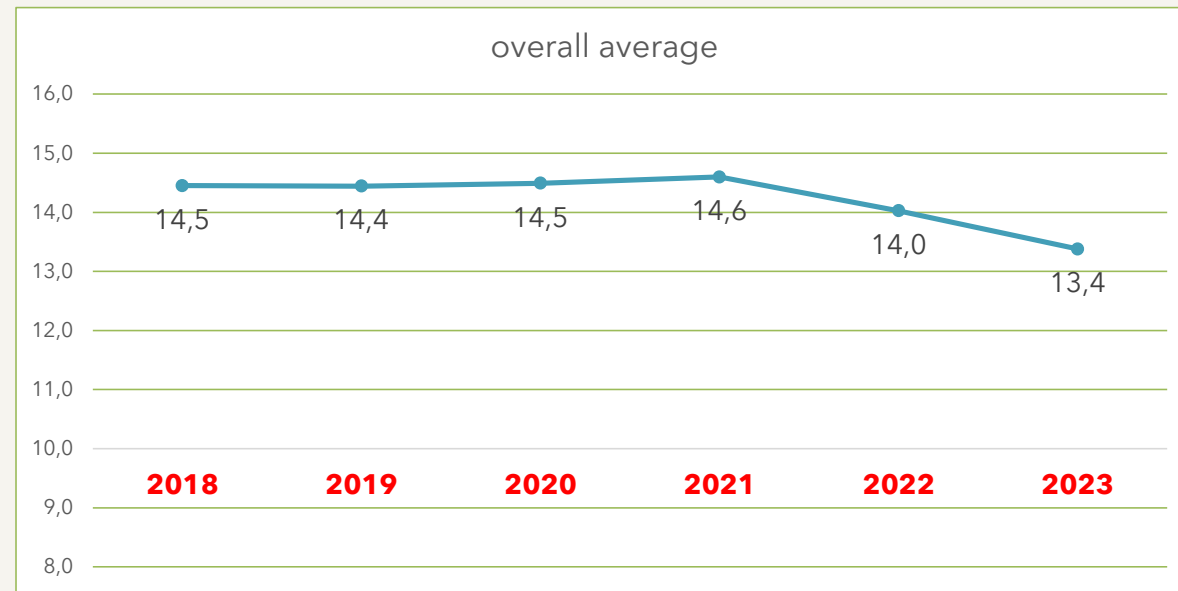
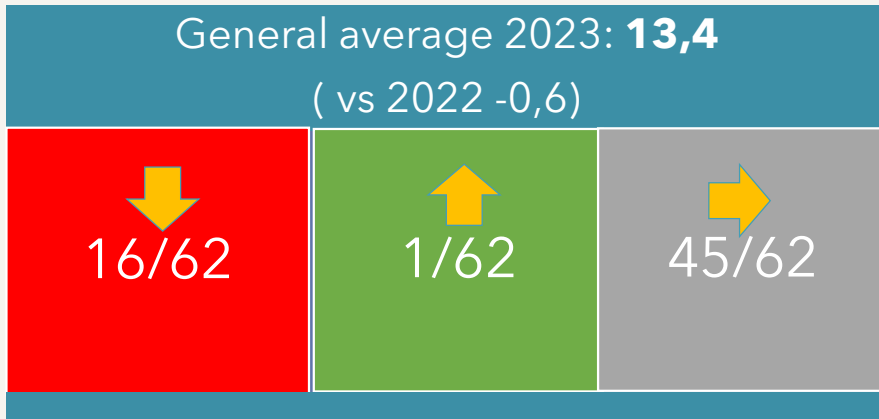
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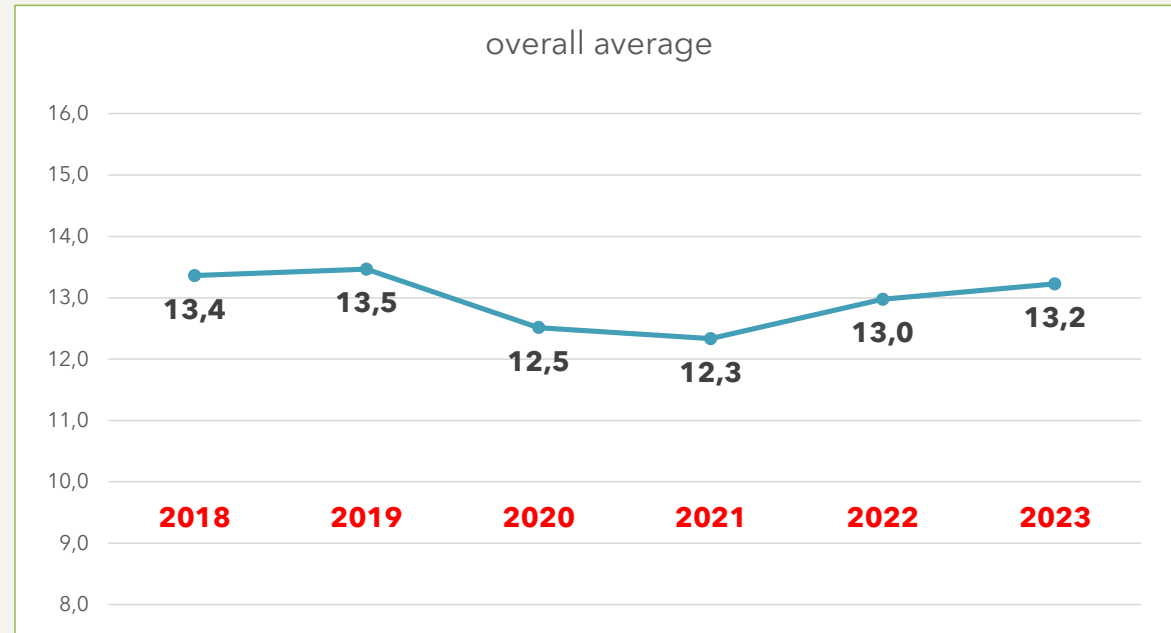
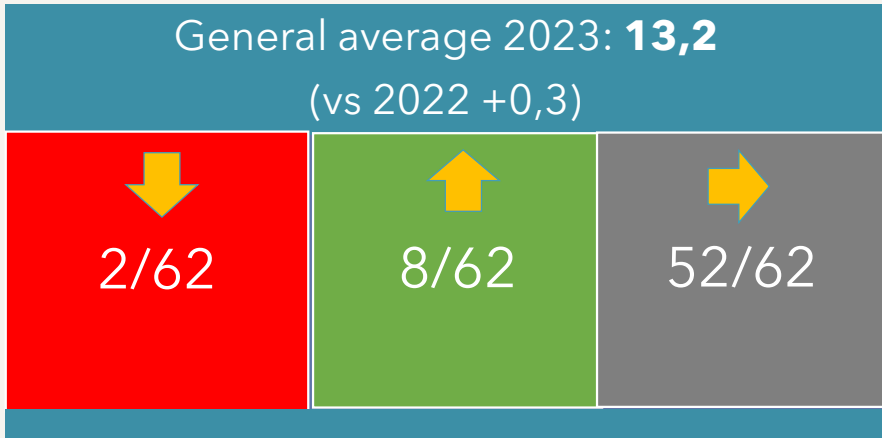


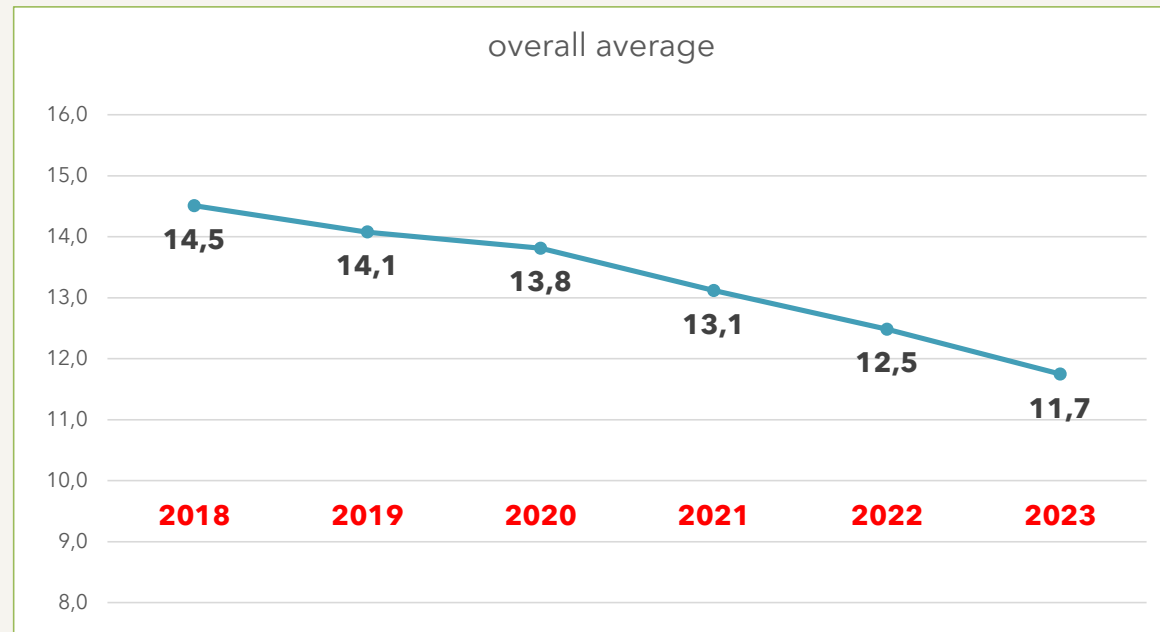
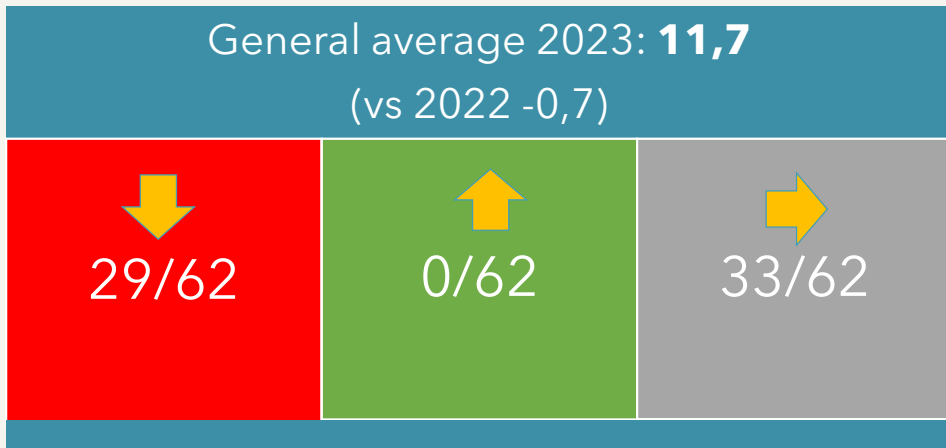
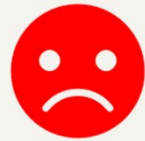


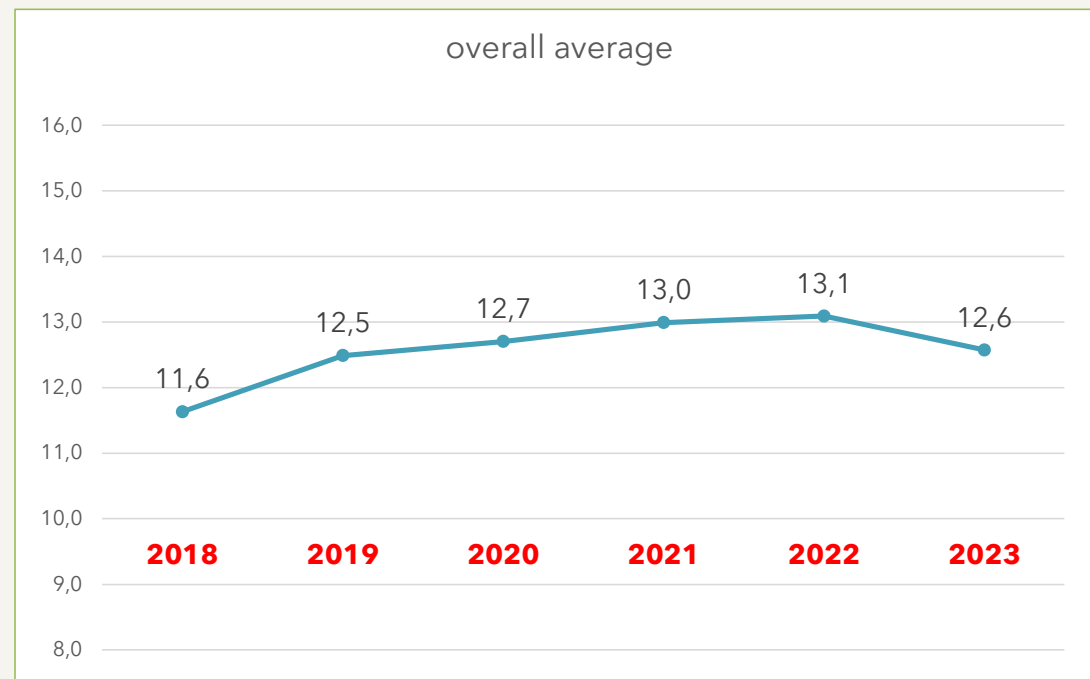
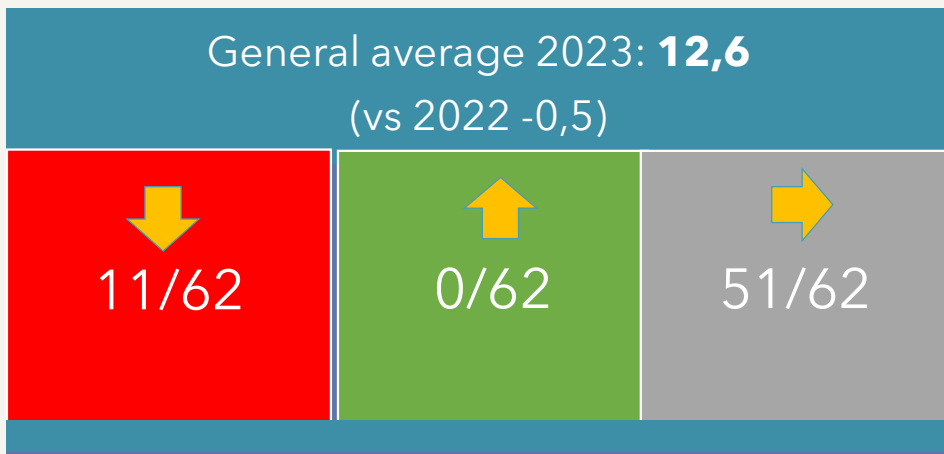
General average 2023: **13,3**  
(vs 2022 -0,1)

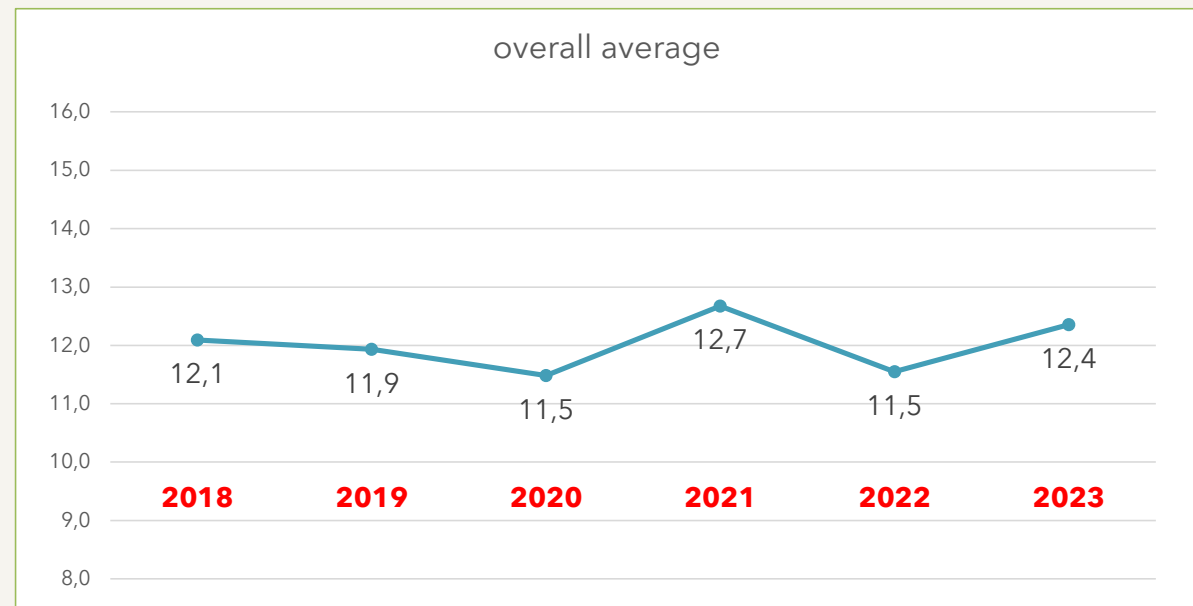
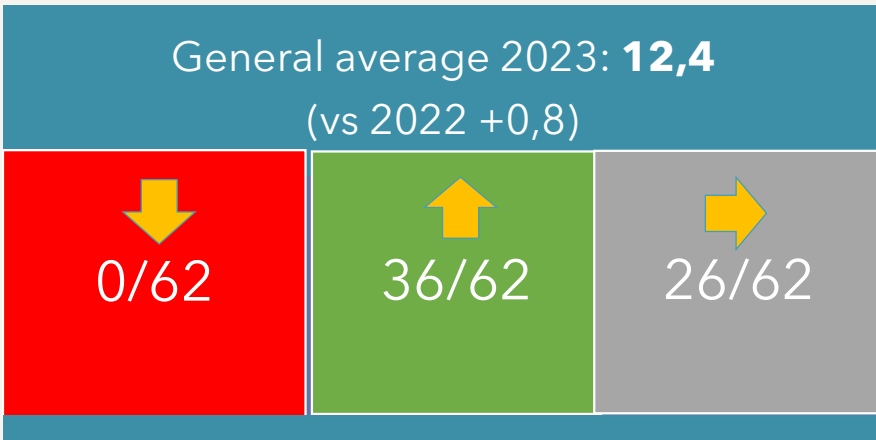


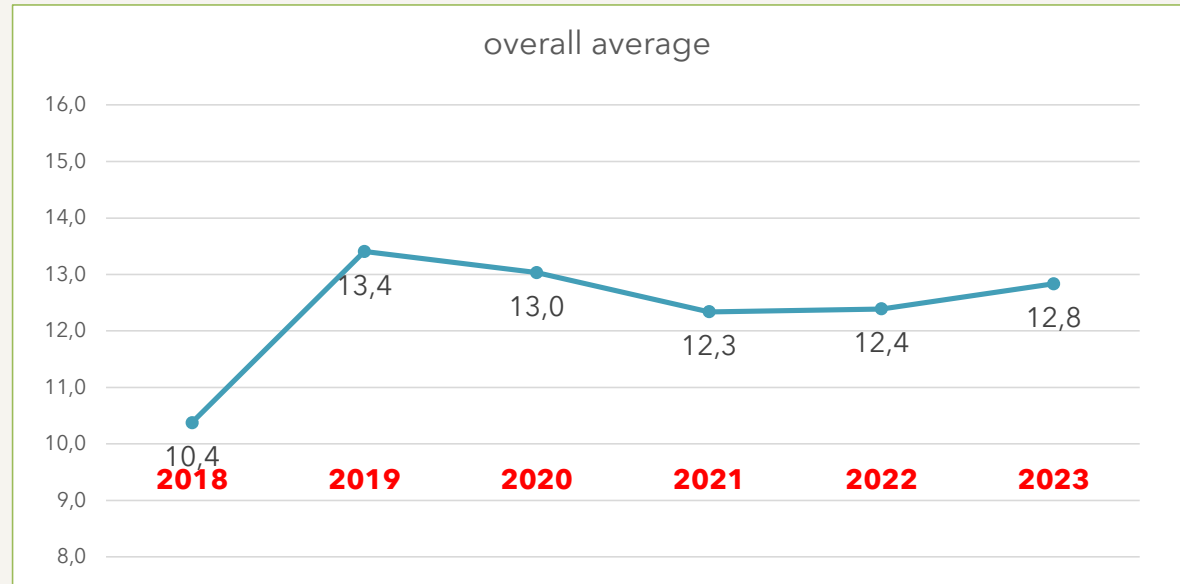
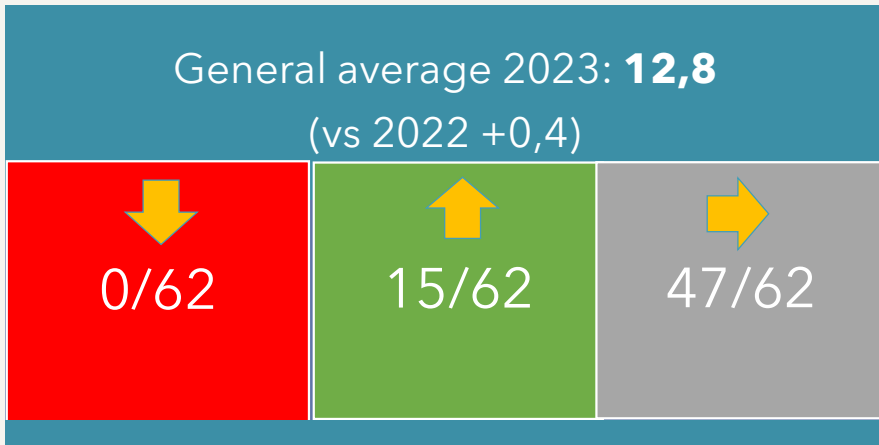


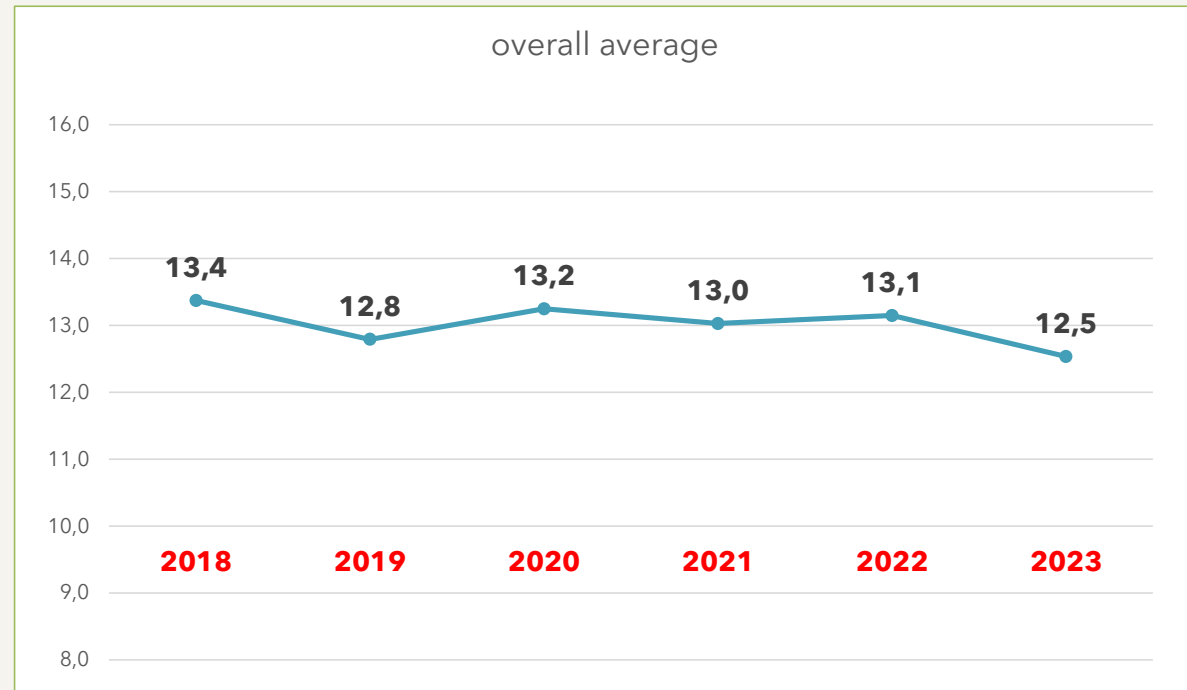
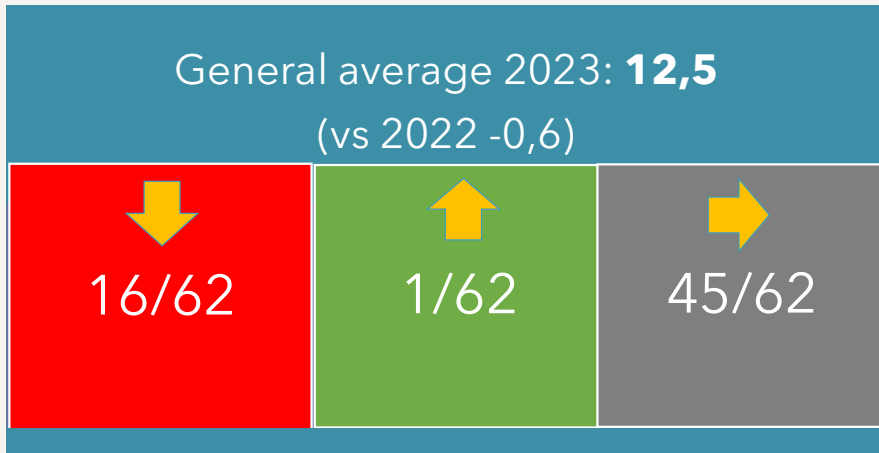












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# FOCUS ON SOME SECTIONS

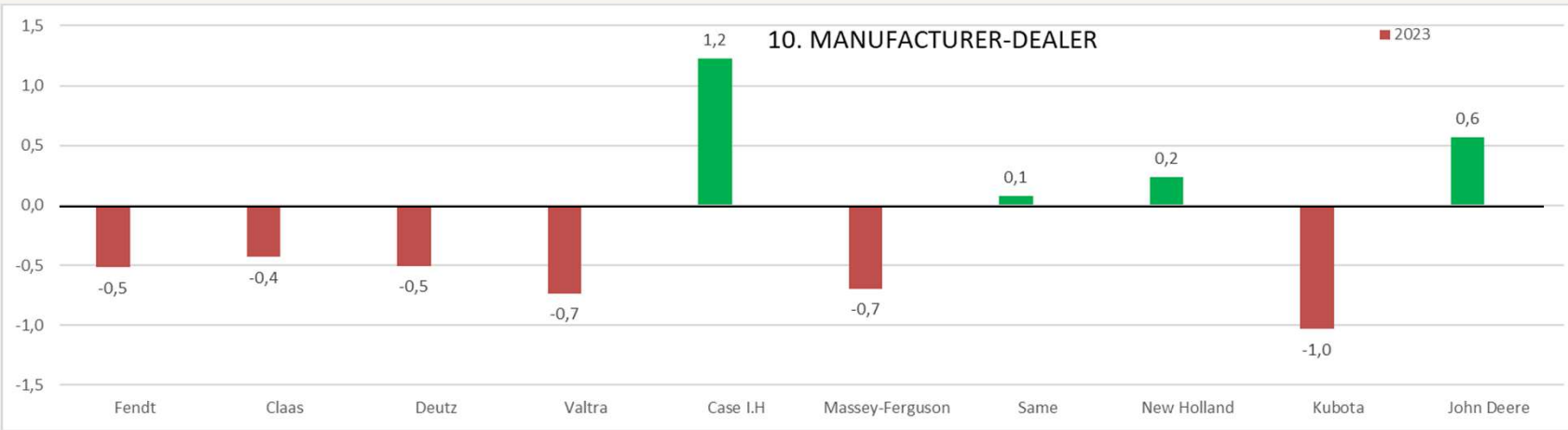
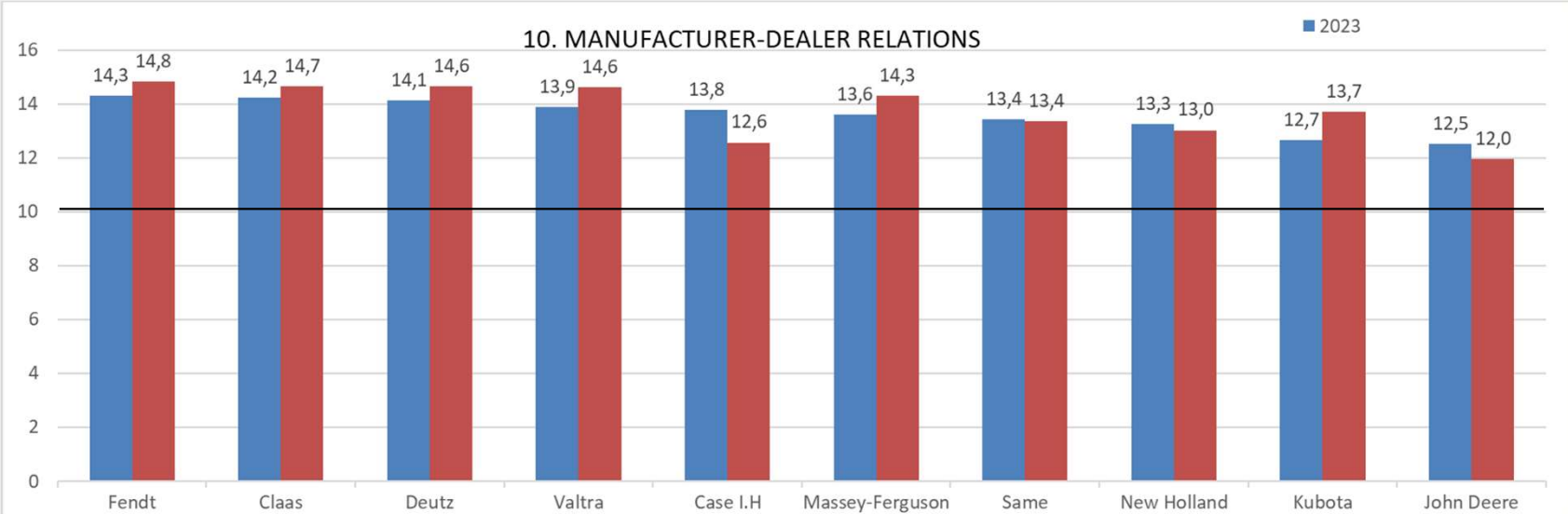
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# Financing offers



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# Manufacturer-Dealer relations



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Thank you for your attention!