



Congress 2023
- Projectteam Market & Data -

CLIMMAR Branch Report

presented by **Projectteam 2: Markets & Data**

Participants

“founder”:    

meanwhile: all other are invited, too



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Goal:

- There are market statistics for all members, with 100% of the members actively participating

Result:

- Increase of participants in existing market statistics up to 100% of the members.
- Development and provision of information and monitor on new market statistics that meet requests and expectations.

Conditions:

- Start slowly to make all members able to join all surveys and to grow year by year.
- Projectteam 2 expects the CLIMMAR-members some kind of “change in daily work” to participate: participation is no longer a will, its a need, a duty; even working with the results



Survey asks for:

- national branch view – current situation: **trends** (halfyear)
- national branch view – **national markets & structures** (yearly)
- dealers view – **companies averages** (yearly)
- dealers view – **warranty conditions** (yearly)

Presentation gives just a small view on similar items,
all CLIMMAR-member associations get a complete version (of all details in an Excelsheet) to
translate und work with the data.



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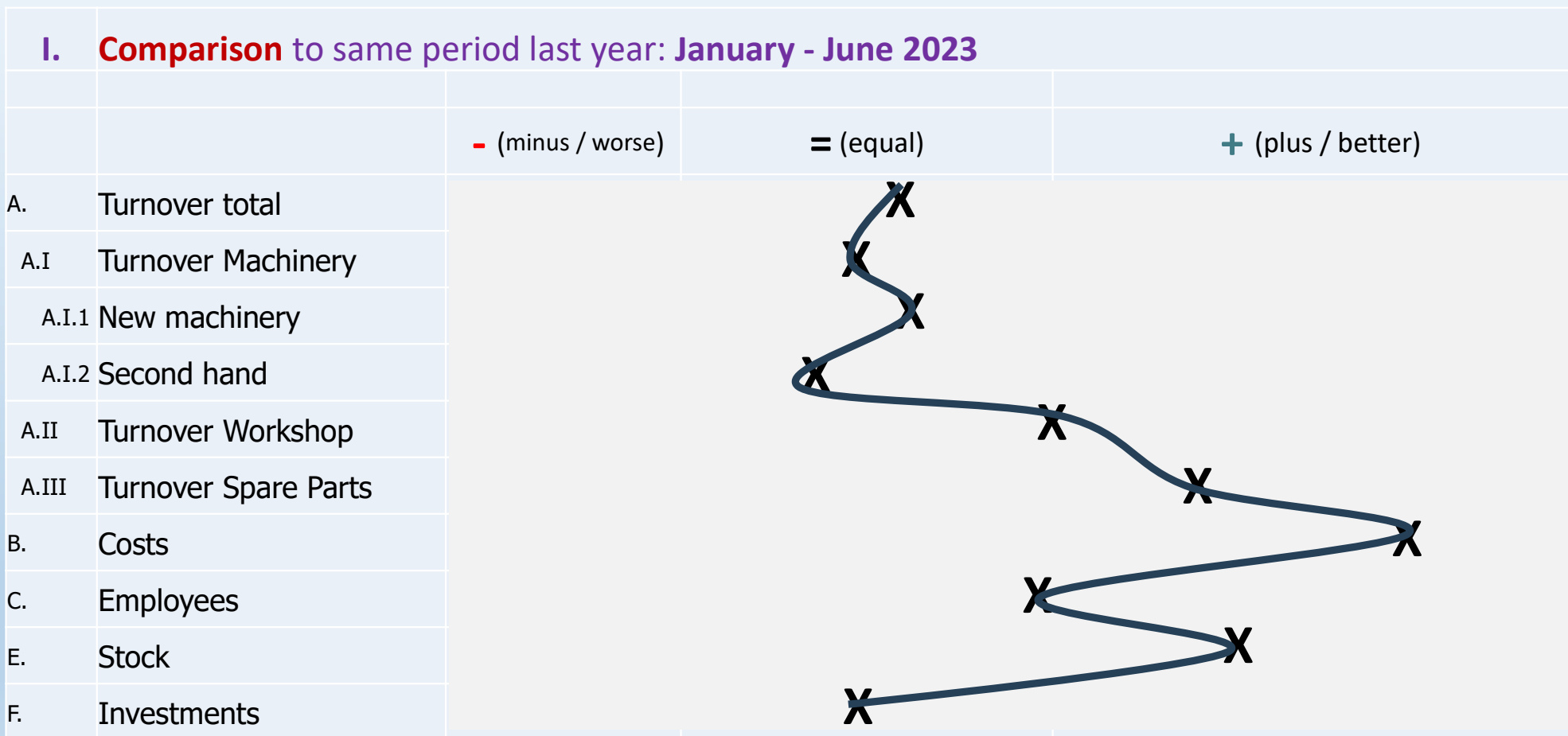
part 1: trends

Survey asks for:

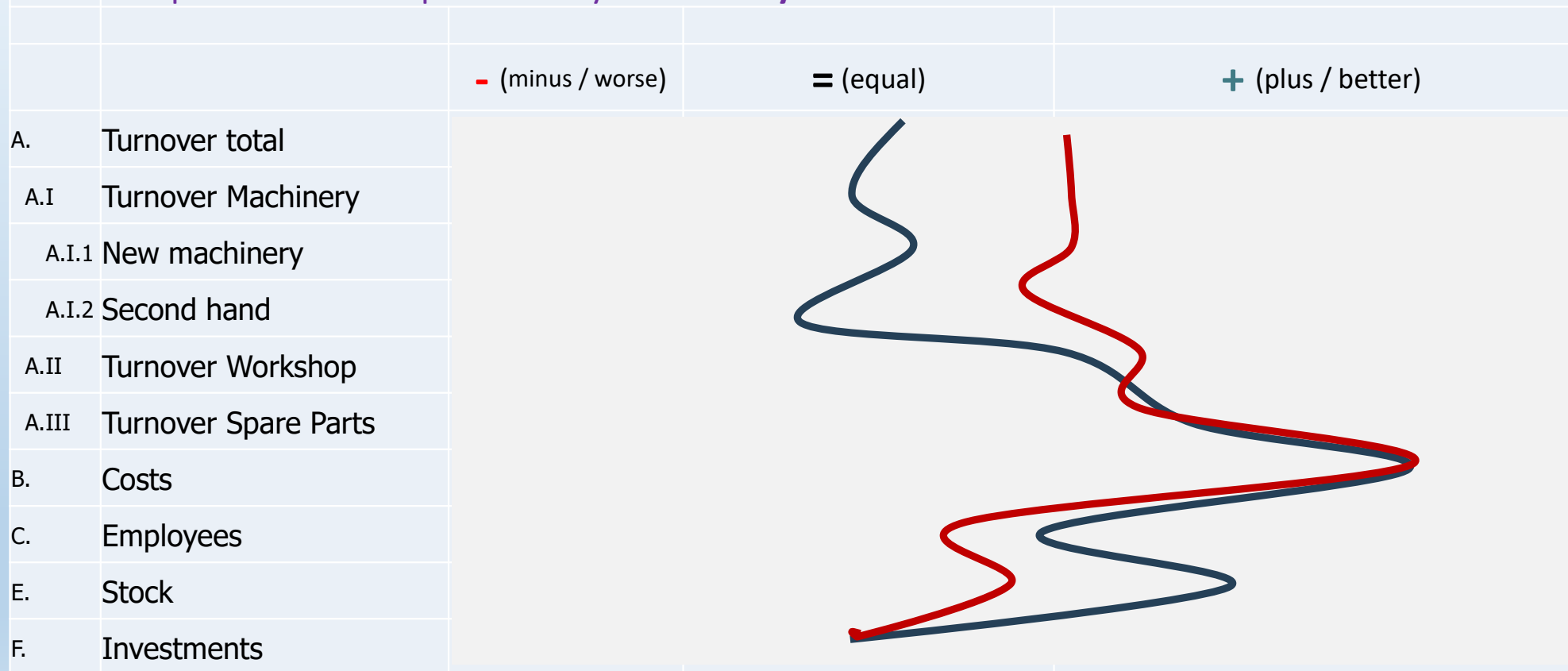
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- dealers view - **warranty conditions** (yearly)



survey-part	country:	AT	BE	CH	CZ	DE	DK	FR	UK	HU	IT	LU	NL	PL	SE	SK	CLIMMAR	
markets trends	comparison	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
	expectations	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
market & structures	basics	100	100	100	100	100	60	100	70	100	100	0	0	70	90	100	79	
	segments 1)	0	100	100	100	0	0	50	0	75	25	0	0	0	100	25	38	
companies' structures	turnover	100	0	100	100	100	100	100	100	100	100	0	0	0	100	100	73	
	wages	100	80	100	100	100	100	100	100	100	100	0	0	80	100	60	81	
sum:	2023	100	76	100	100	100	92	100	94	100	100	40	0	70	98	92	84	
	2022	100	76	98	100	100	94	100	56	100	96	100	40	72	98	92	92	
participation tendency:		➡	➡	➡	➡	➡	➡	➡	➡	➡	➡	➡	➡	➡	➡	➡	➡	➡
1) free to fulfill survey part																		



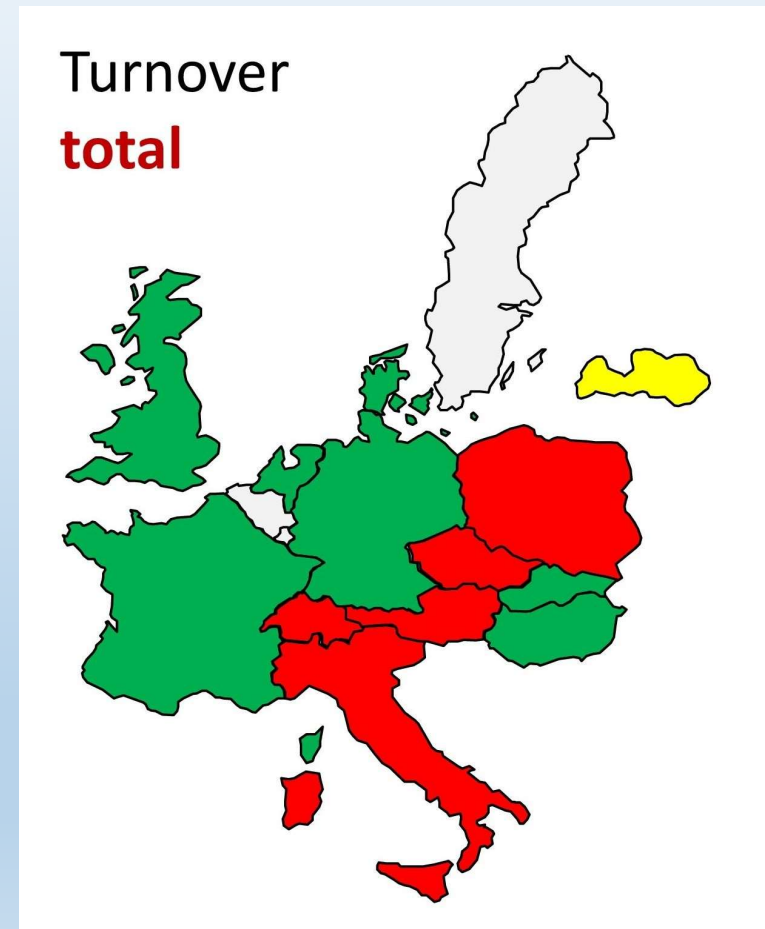
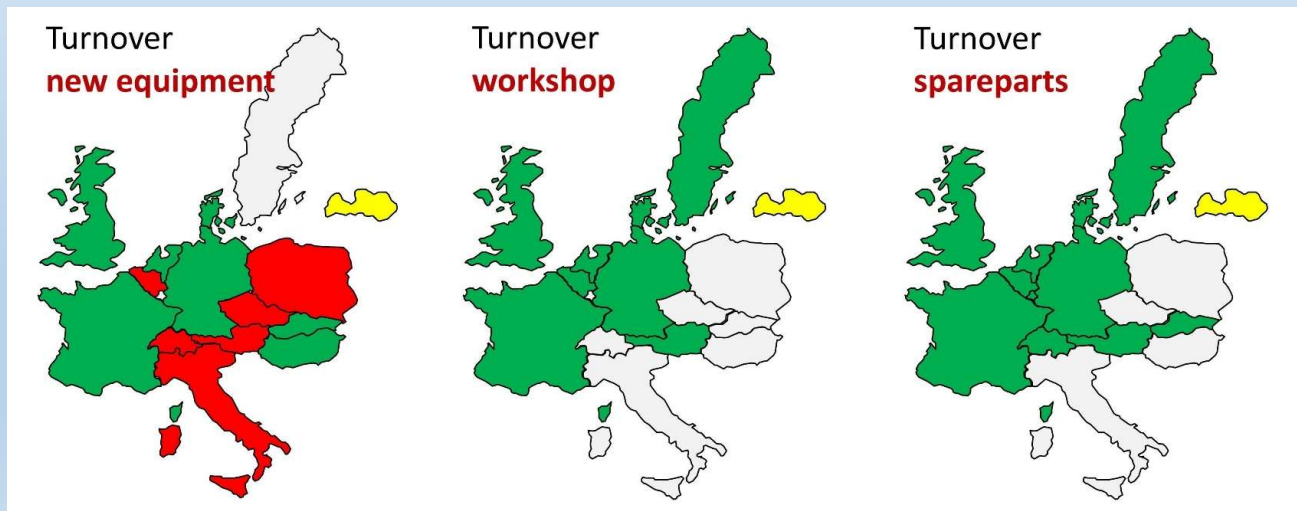
I. Comparison to same period last year: January - June 2023



Turnover

development of turnover in the first half of 2023 compared with the same period 2022:

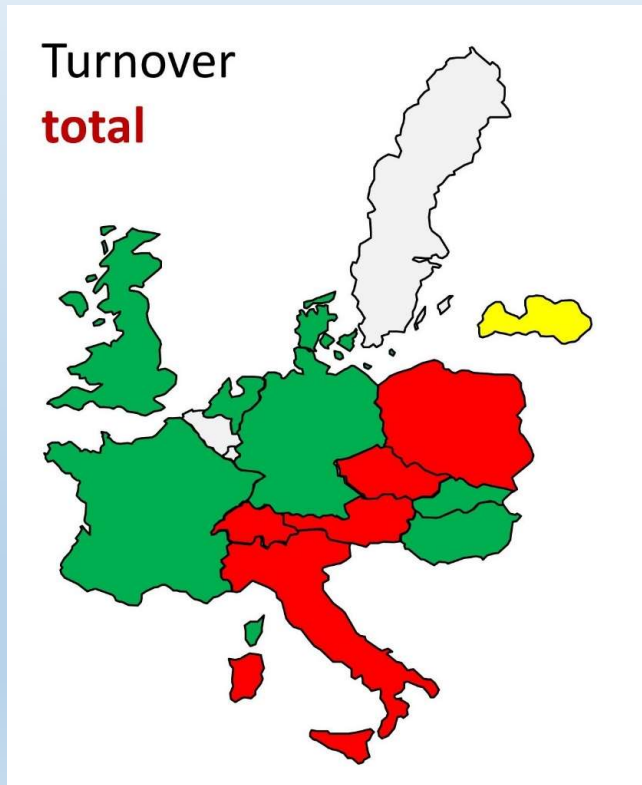
- less / worse / decrease
- equal
- more / growing / increase
- no answer



I. Expectation for the next period: July - December 2023				
		- (minus / worse)	= (equal)	+ (plus / better)
A.	Turnover total	AT CH CZ IT PL	BE LU SE	DE DK FR GB HU SK
A.I	Turnover Machinery	AT BE CH CZ IT PL	DE LU SE	DK GB FR HU SK
A.I.1	New machinery	AT BE CH CZ IT PL	LU SE	DE DK GB FR HU PL SK
A.I.2	Second hand	CH DE CZ HU	AT BE FR GB IT LU PL SE SK	DK
A.II	Turnover Workshop	0	CH CZ HU IT LU PL SK	AT BE DE DK FR GB SE
A.III	Turnover Spare Parts	0	CZ HU IT PL	AT BE CH DE DK FR GB LU SE SK
B.	Costs	0	0	AT BE CH CZ DE DK FR GB HU IT LU PL SE SK
C.	Employees	0	AT CH CZ DK IT LU PL	BE DE FR GB HU SE SK
E.	Stock	CH	CZ DK	AT BE DE FR GB HU IT LU PL SE SK
F.	Investments	AT CZ HU	BE CH DE DK IT LU PL SE	FR GB SK

Development

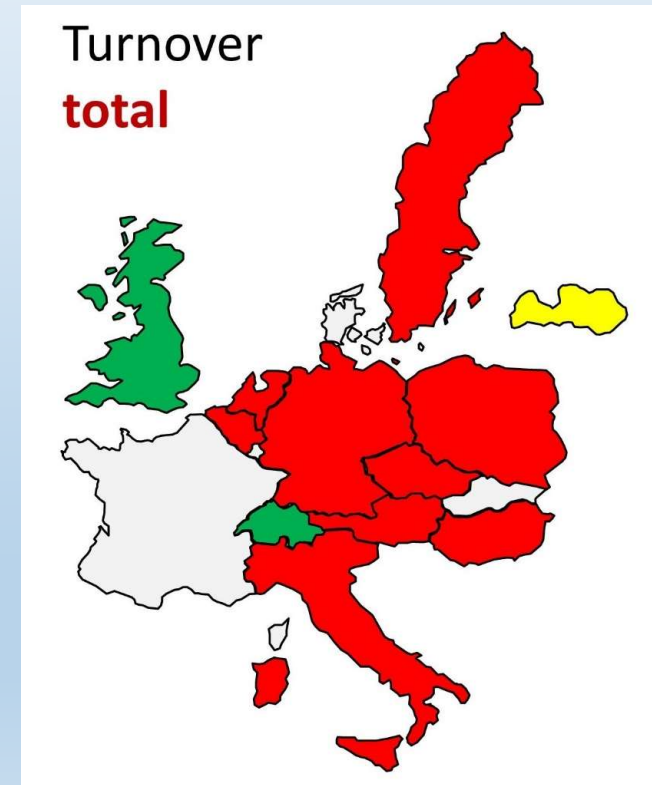
of turnover in the first half of 2023



- less / worse / decrease
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- no answer

Expectations

of turnover for next half of 2023

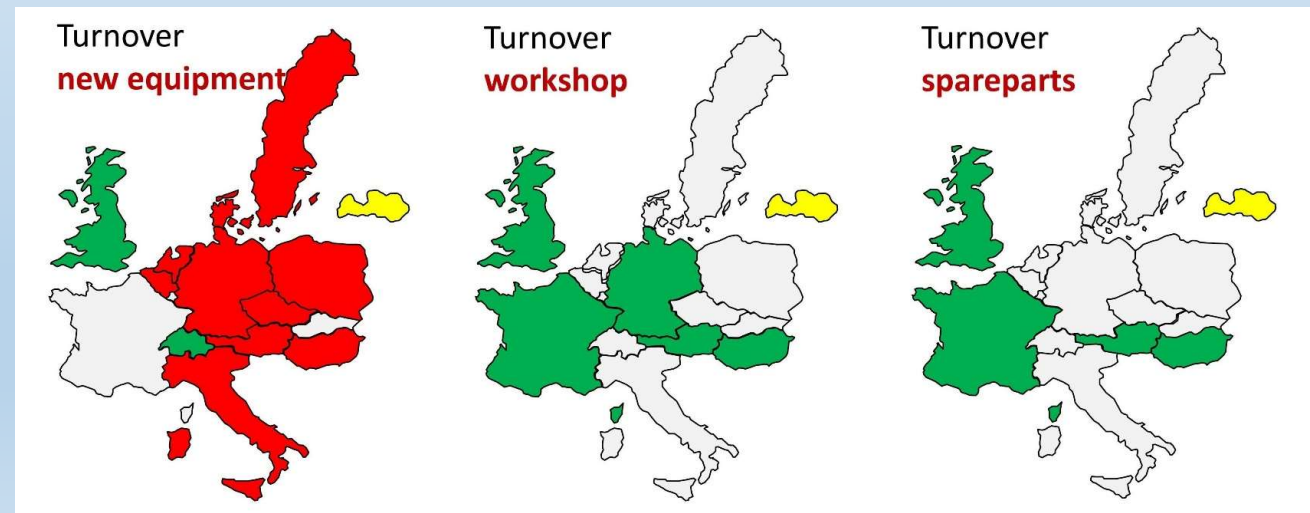


Development of turnover in the first half of 2023



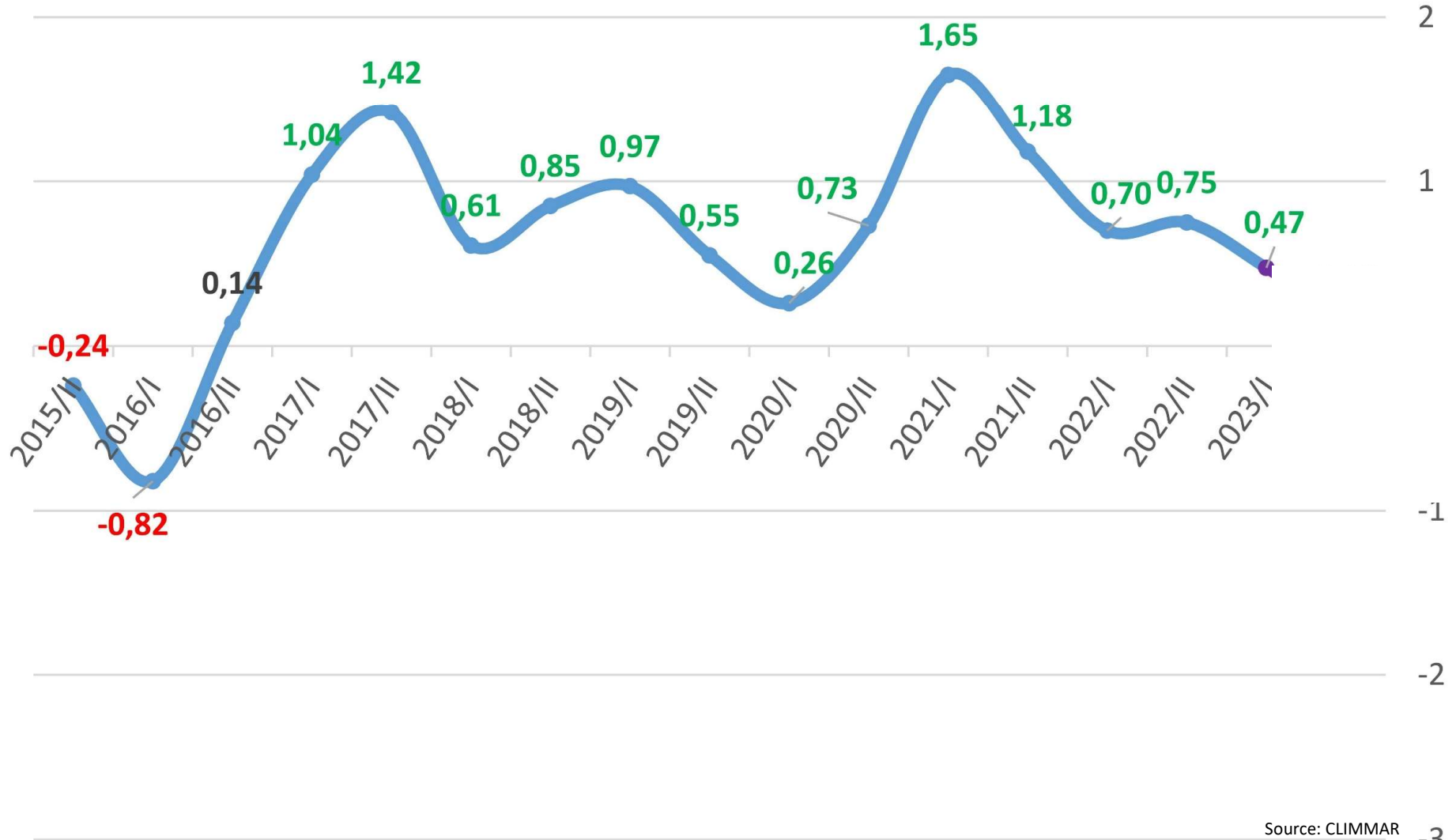
Expectations of turnover for next half of 2023

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- no answer



CLIMMAR-Index:

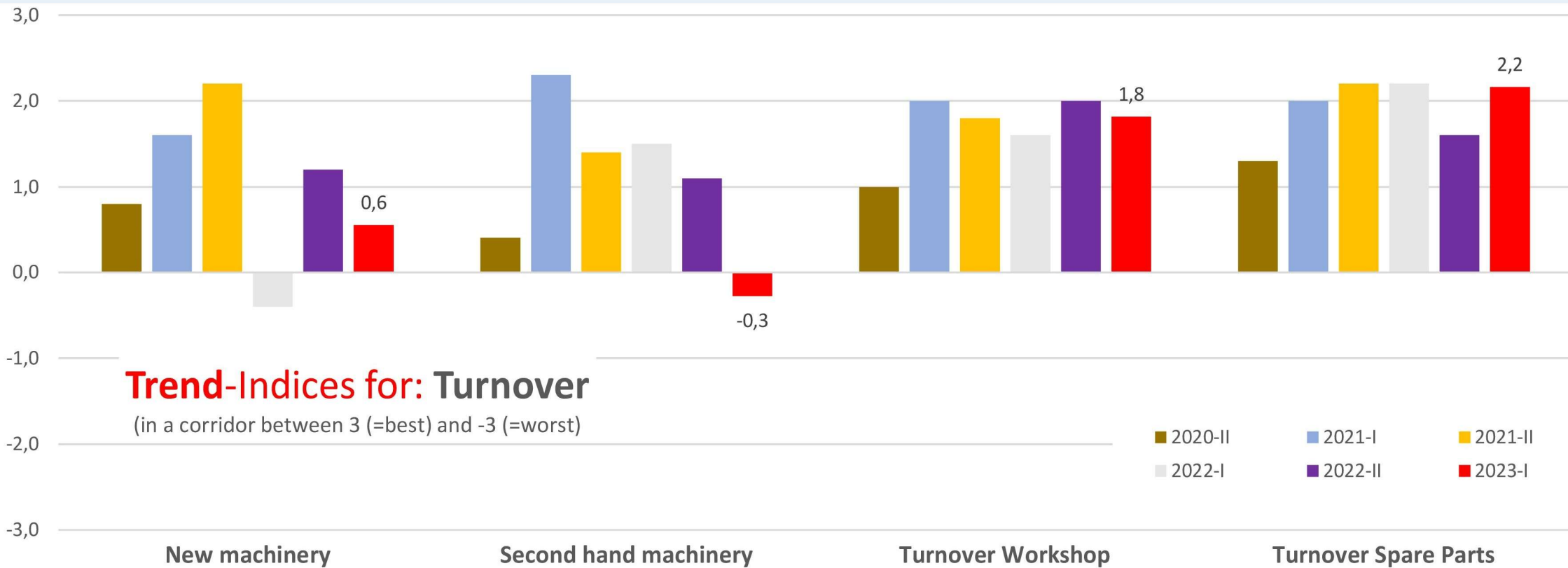
(half-year-trendindex for ag-dealers and -service all over Europe /
halbjähriger Konjunkturwert für Landmaschinenhandel und -service in ganz Europa)



CLIMMAR-Index:

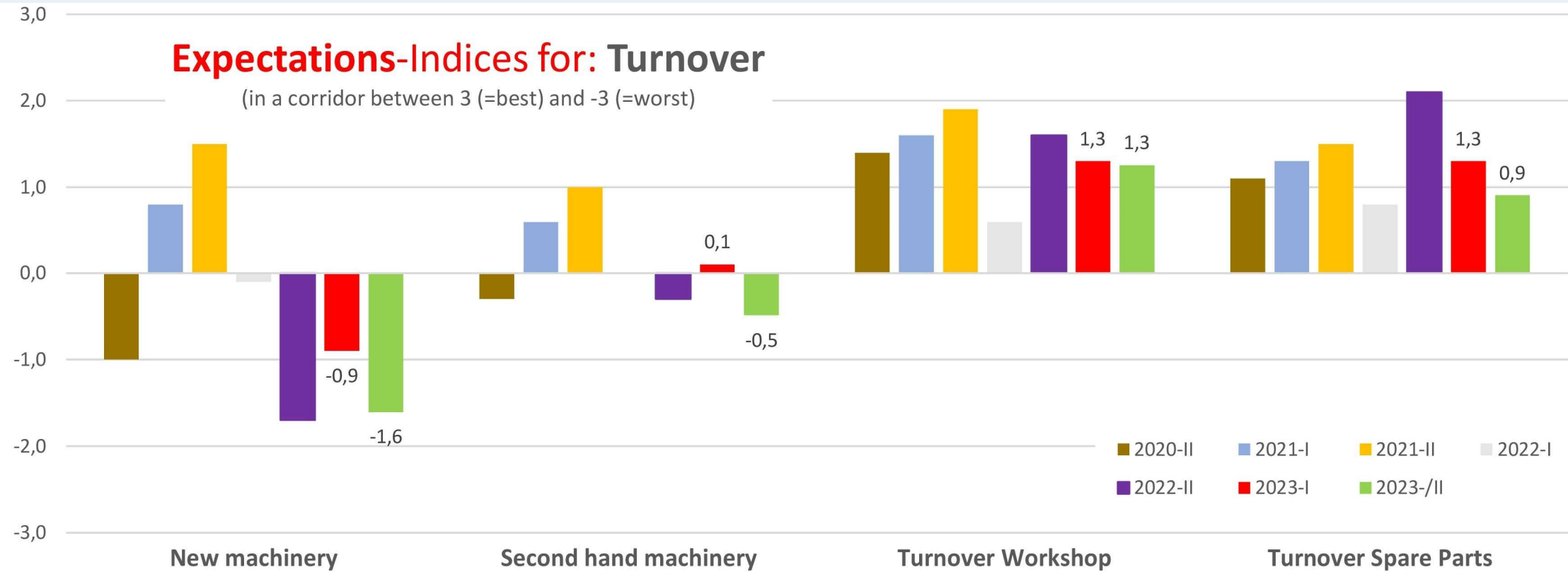
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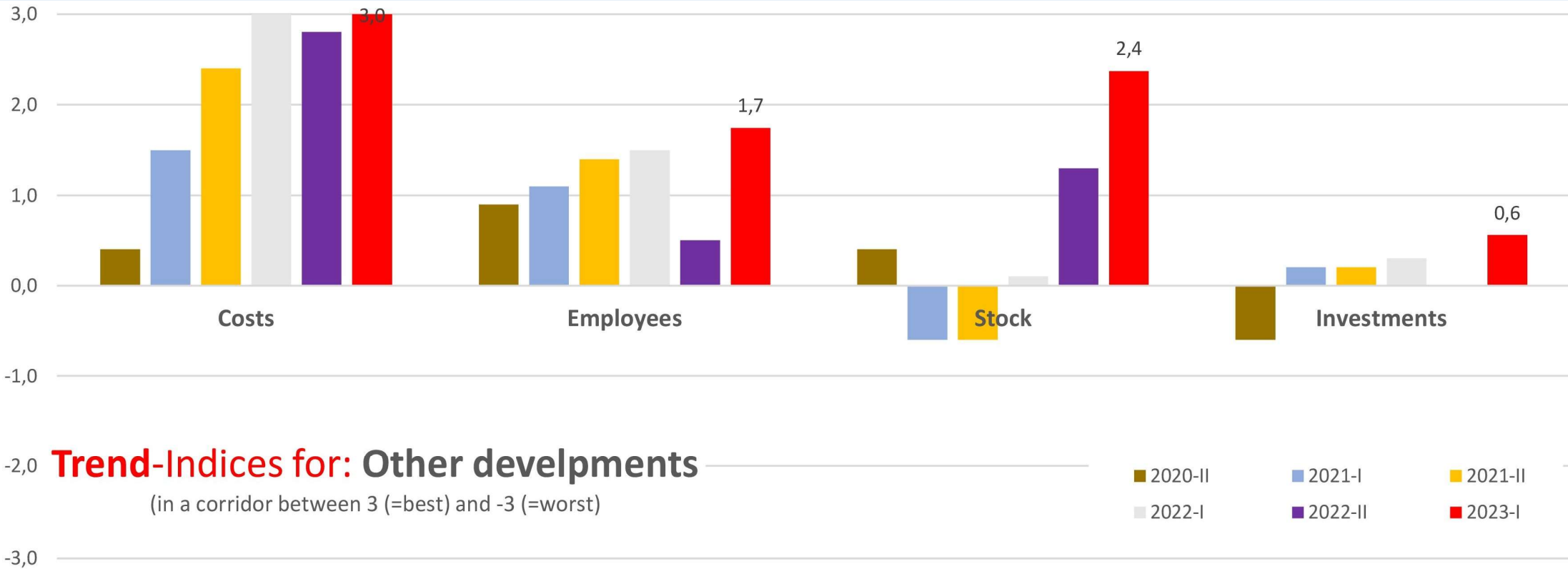


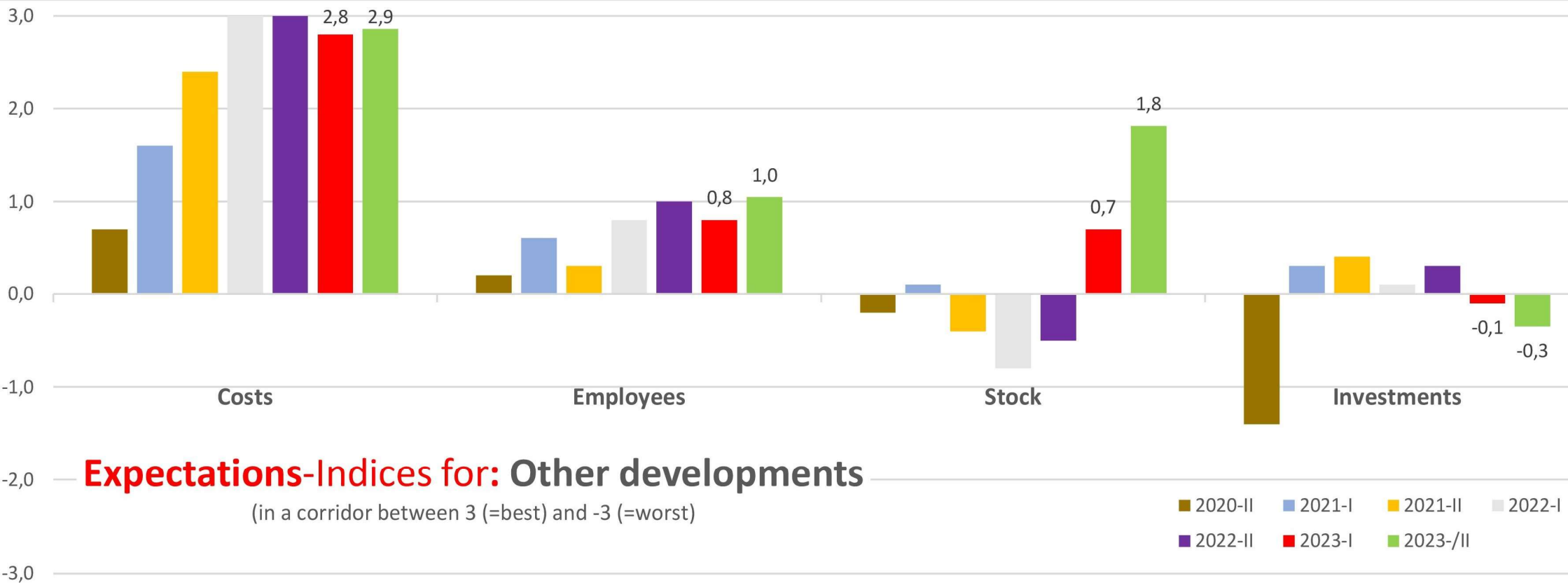


Expectations-Indices for: Turnover

(in a corridor between 3 (=best) and -3 (=worst))









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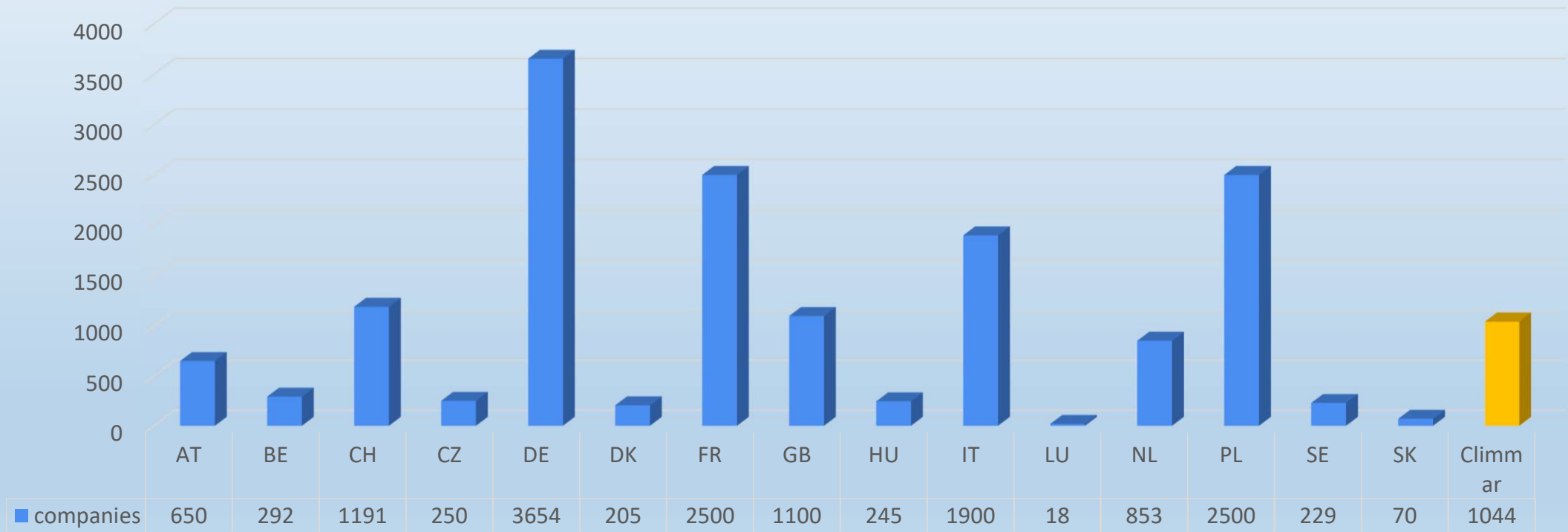


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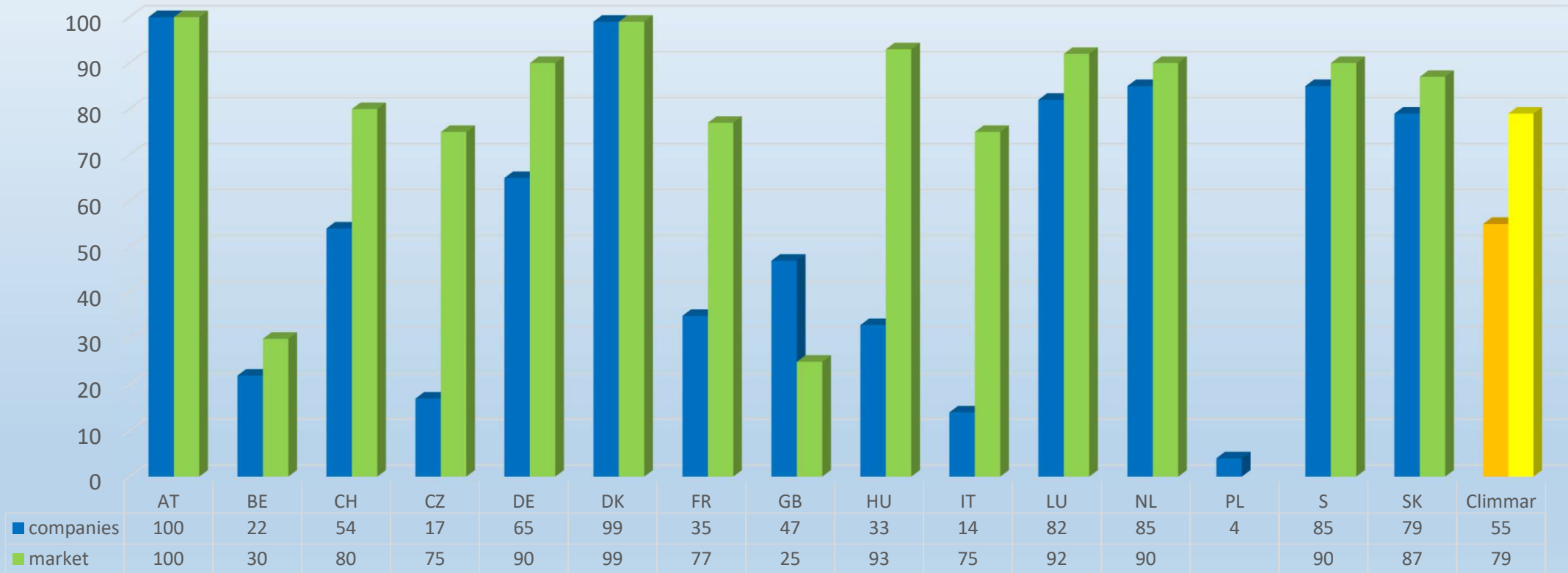
part 1: trends

survey-part	country:	AT	BE	CH	CZ	DE	DK	FR	UK	HU	IT	LU	NL	PL	SE	SK	CLIMMAR	
markets trends	comparison	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
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market & structures	basics	100	100	100	100	100	60	100	70	100	100	0	0	70	90	100	79	
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1) free to fulfill survey part																		

number of Companies: 15,657 Dealers (incl. satellites) & Servicefirms

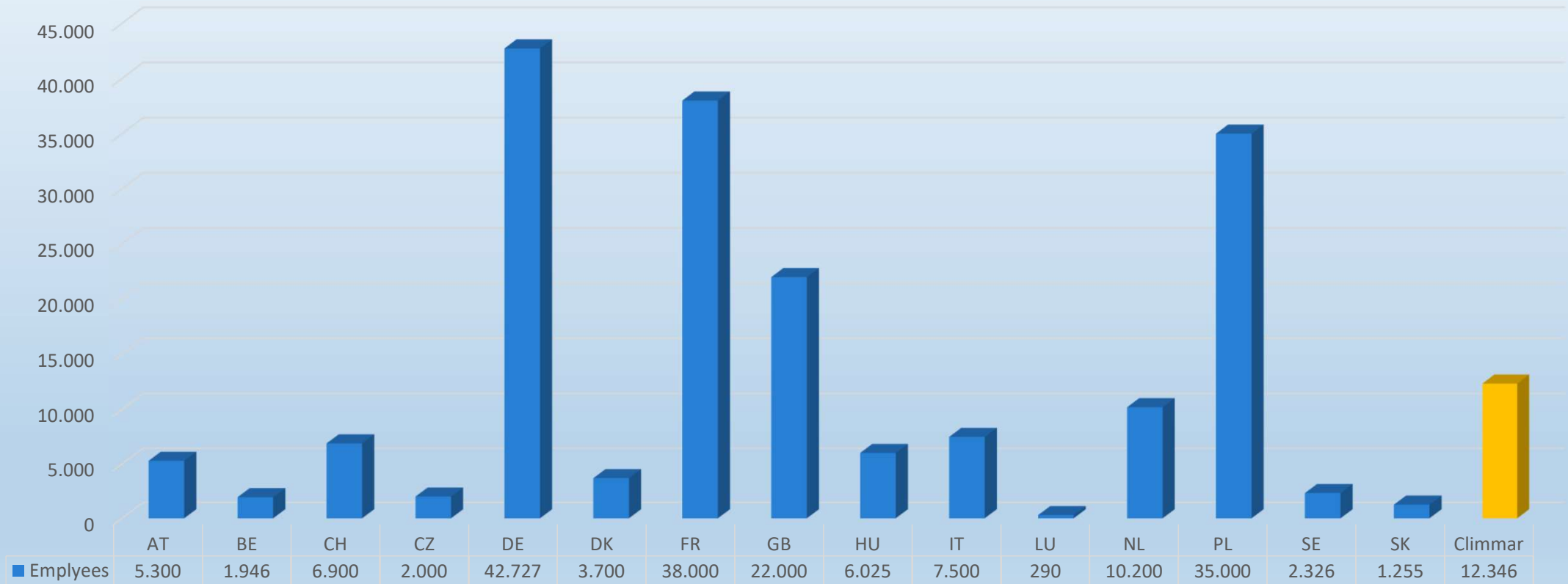


organisation level: **55%** membership are responsible for **79%** of the market



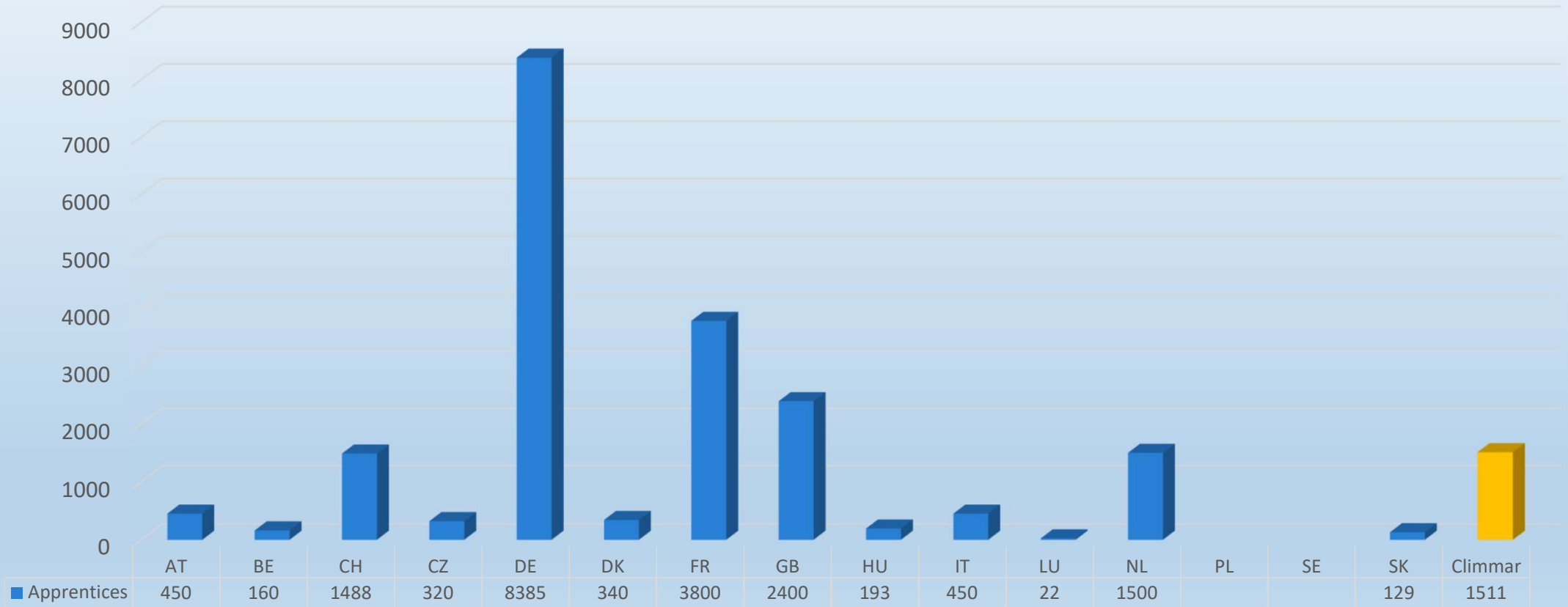


close to **185,200** Employees

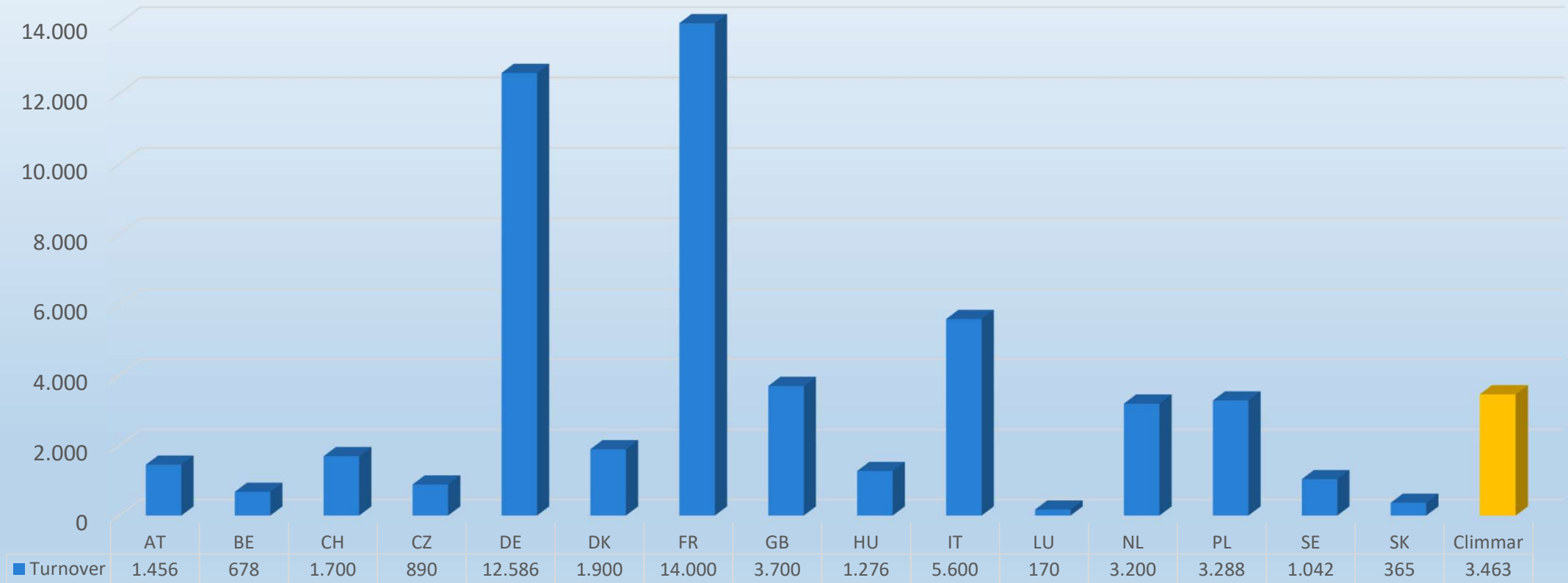




about **19,600** Apprentices

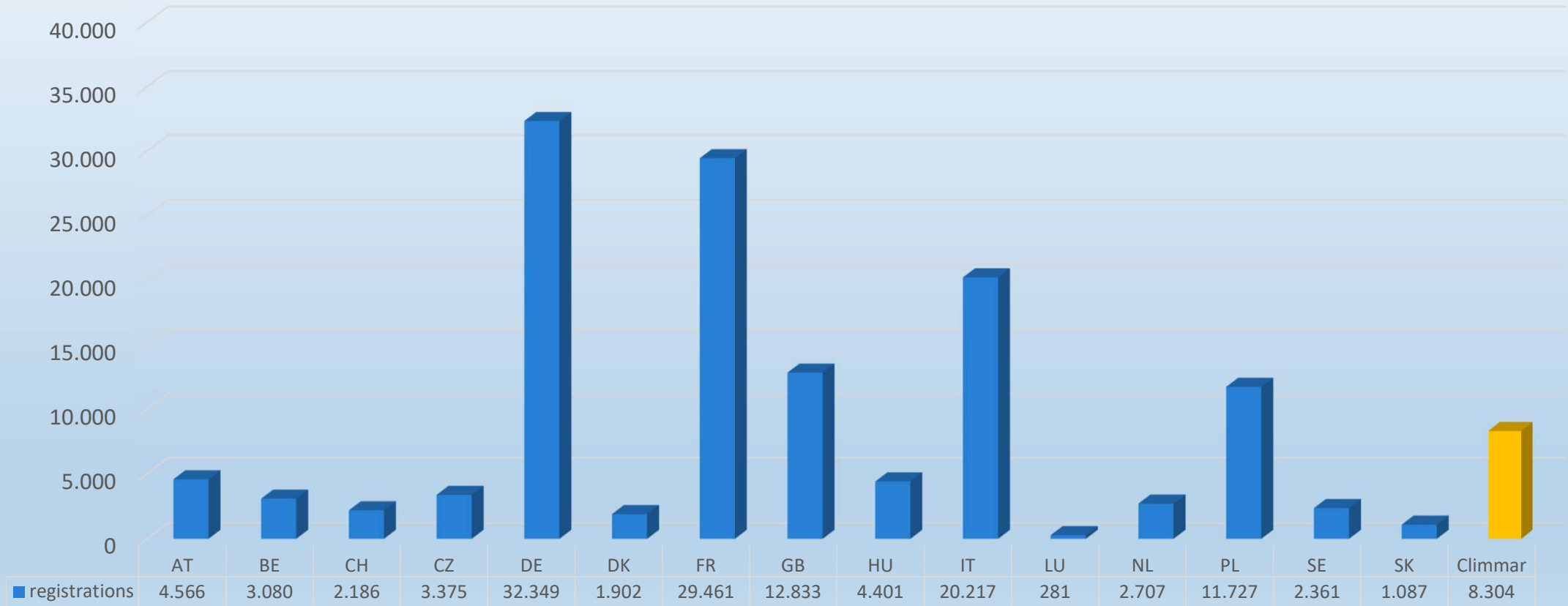


Turnover (in Mio. €): **51,900**



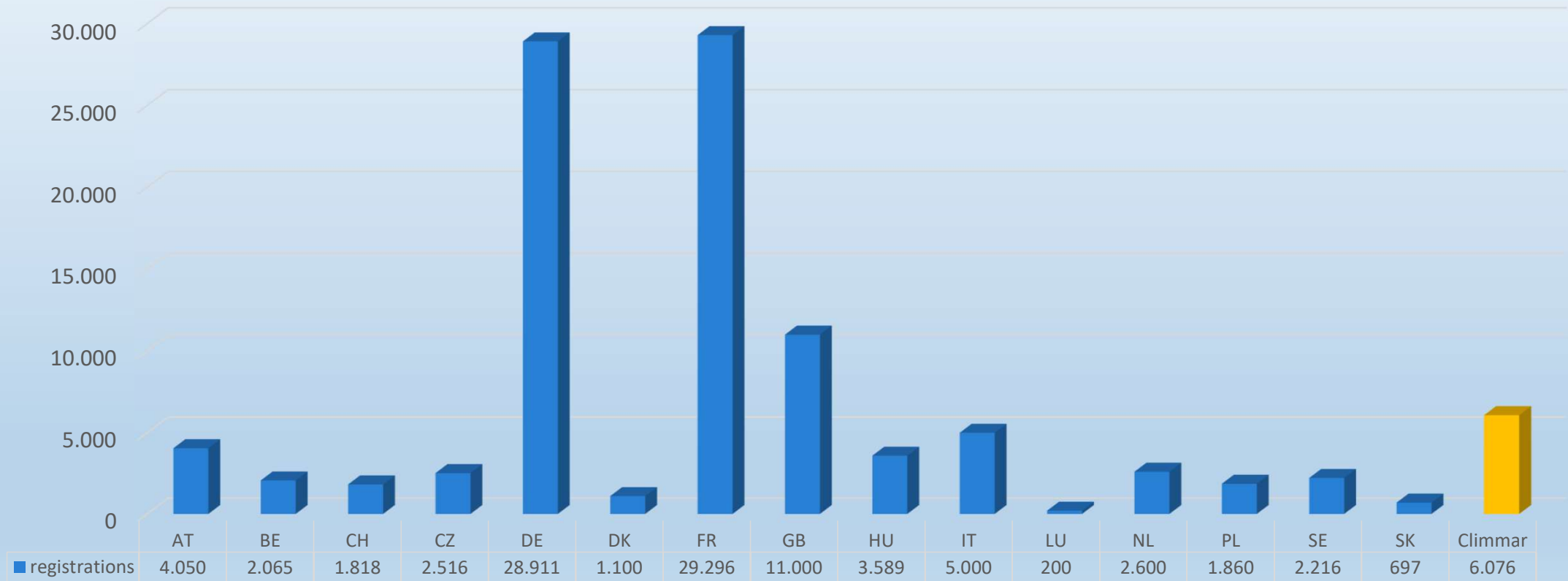


Tractor Sales: **132,500** units

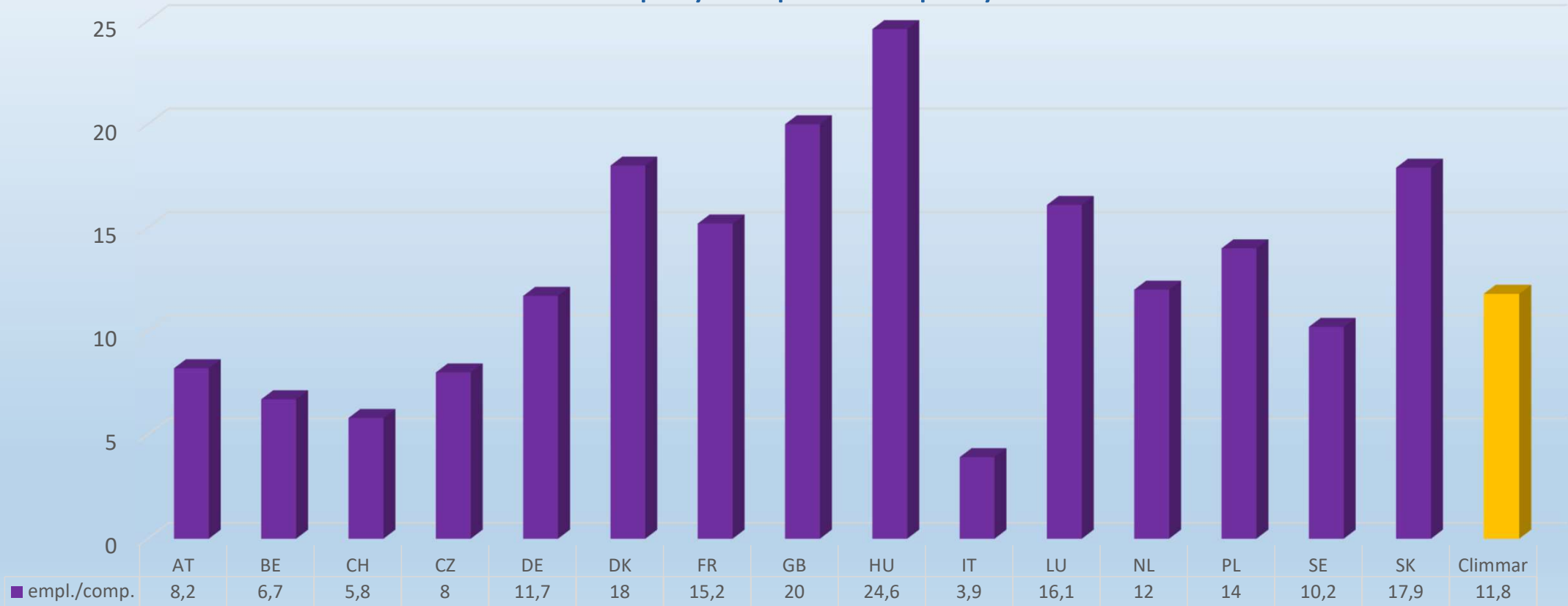




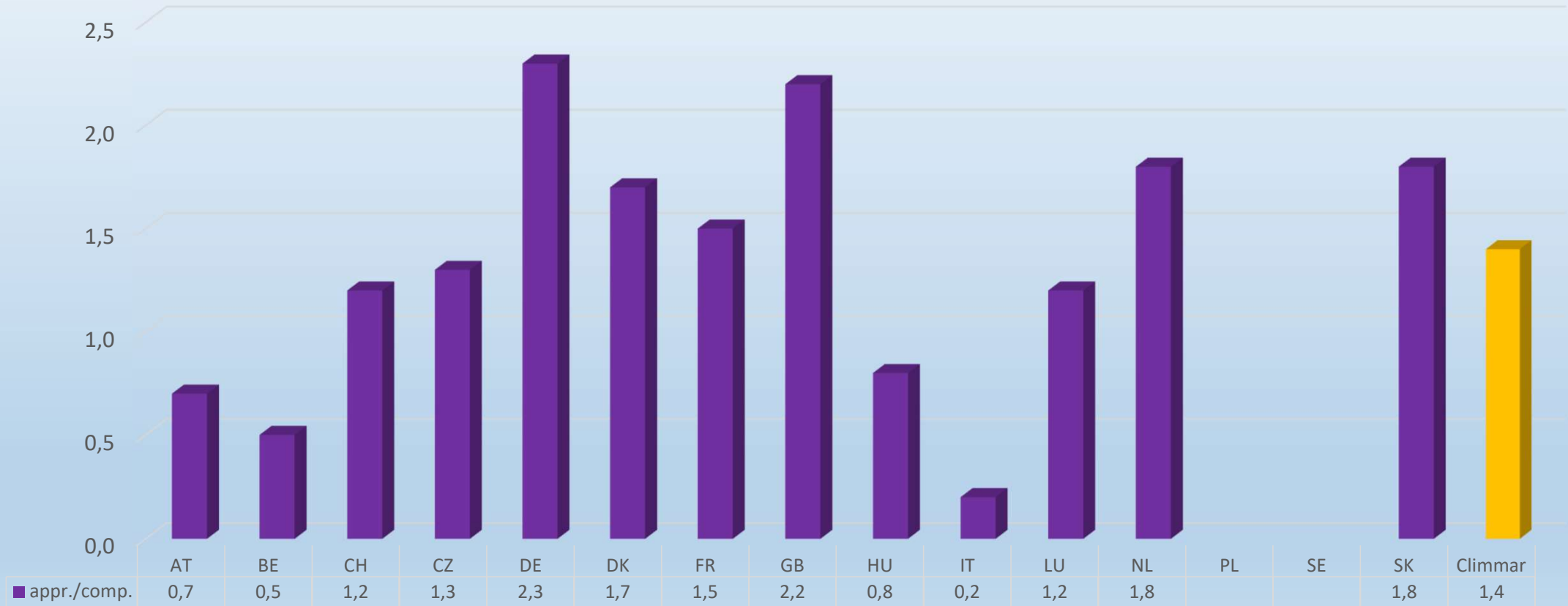
Tractor Sales (50 hp or more): **96,900** units



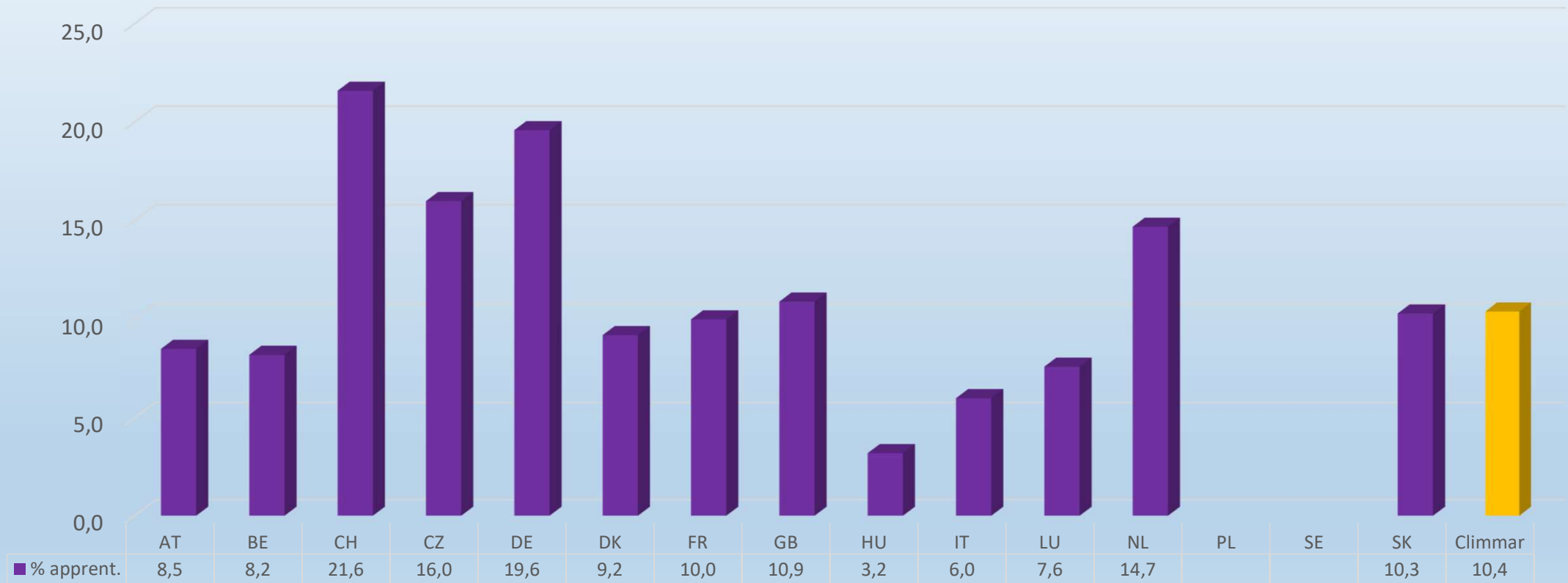
Relations - Employees per Company: **11.8**



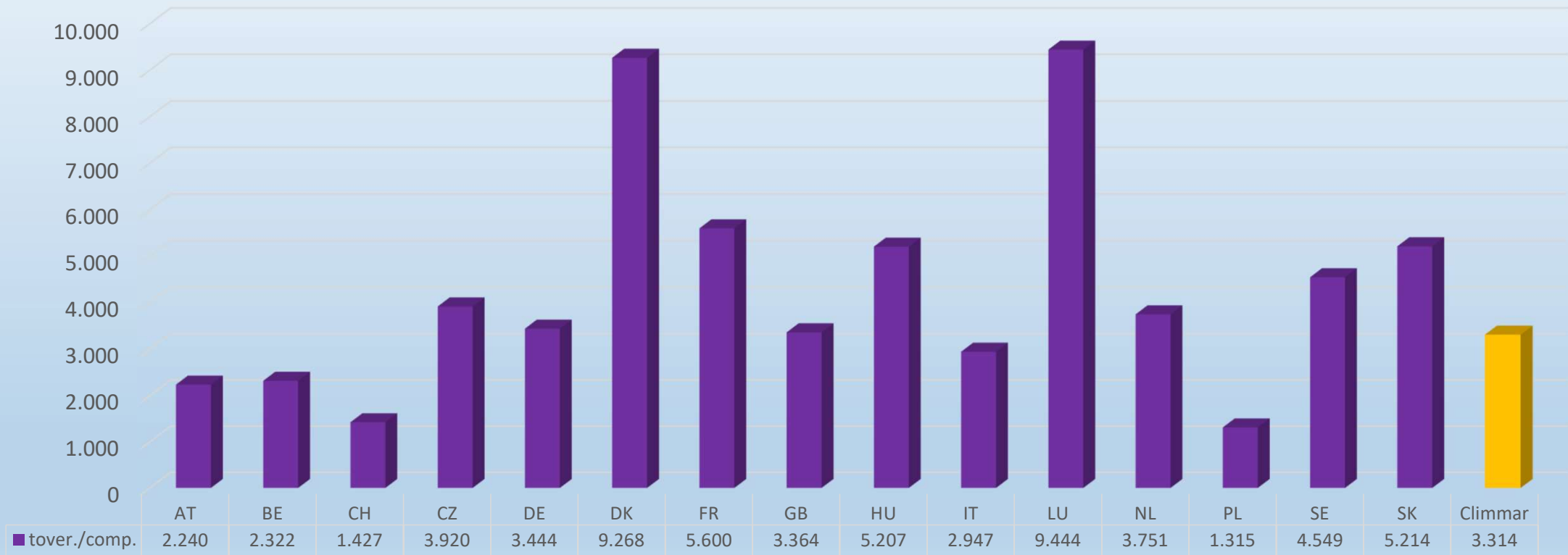
Relations - Apprentices per Company: **1.4**



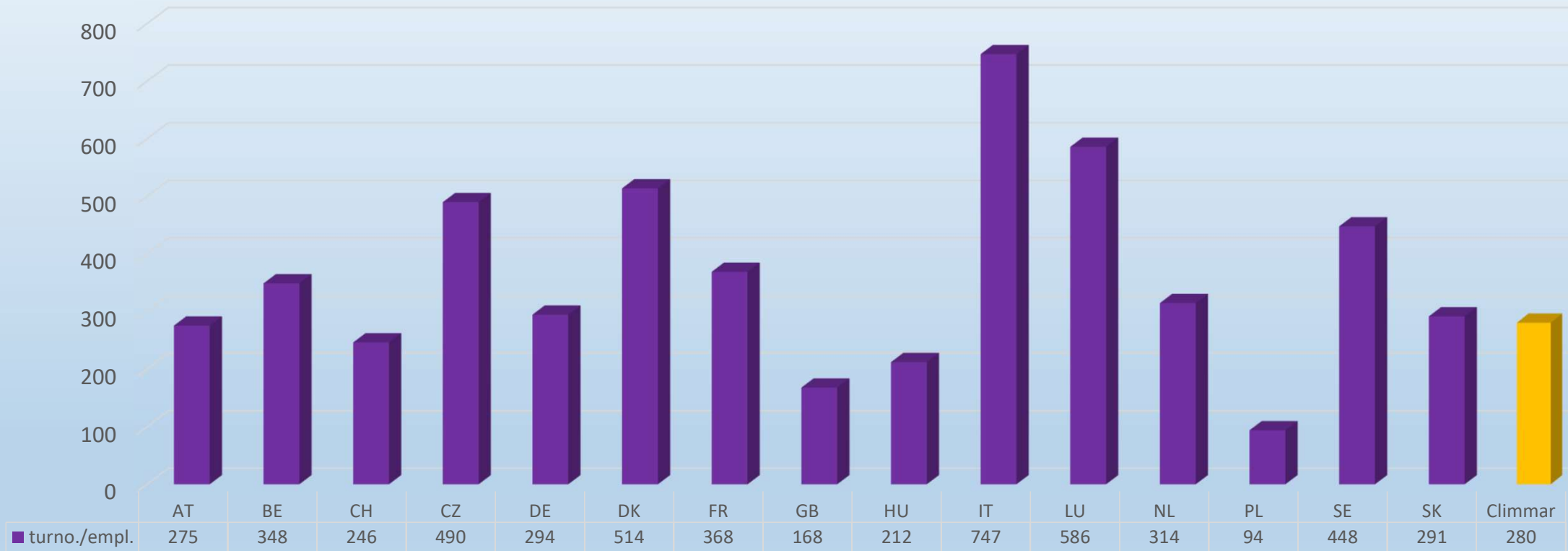
Relations - % Apprentices (of Employees): **10.4**



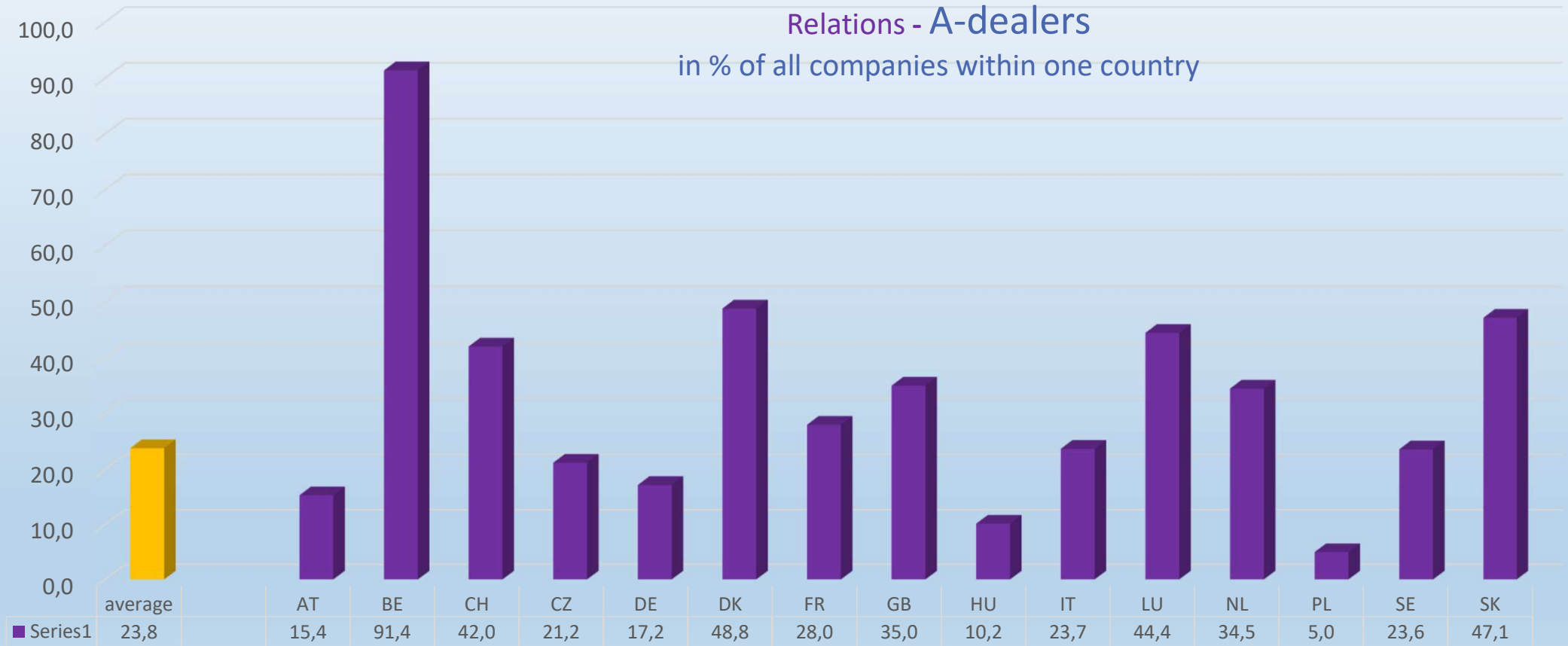
Relations - Turnover per Company: **3,314** (in 1,000 €/comp.)



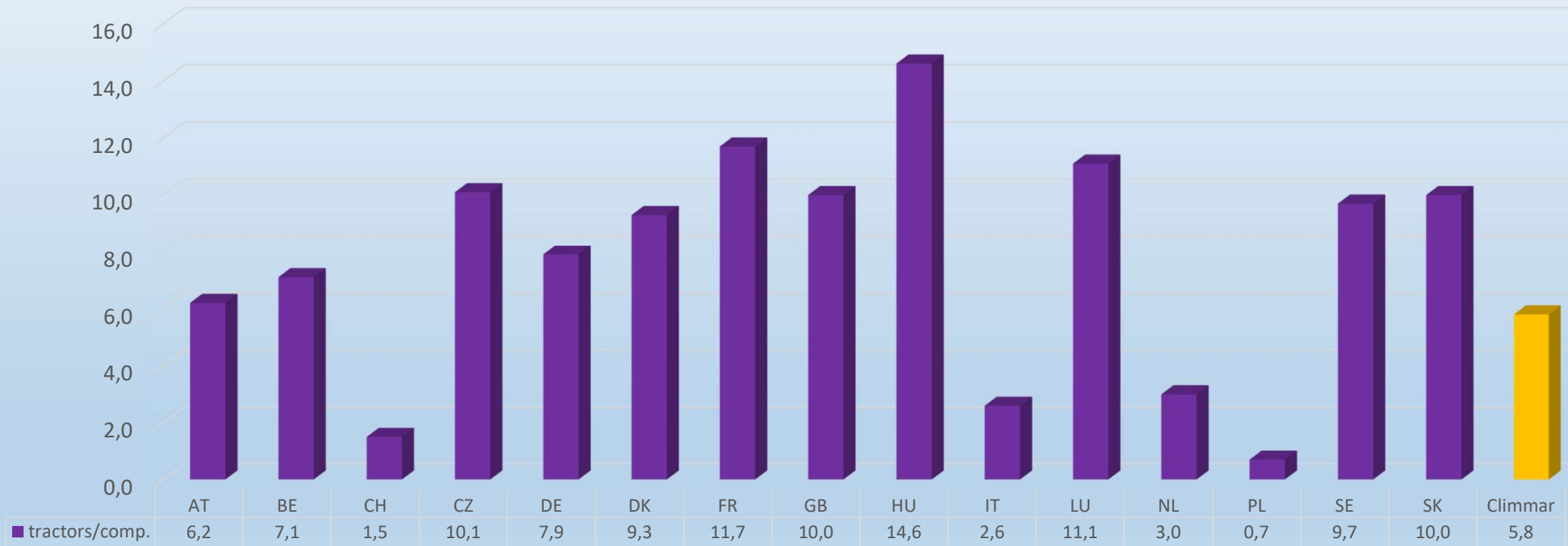
Relations - Turnover per Employee: **280,000** €/pers.



Relations - A-dealers
in % of all companies within one country



Relations - **Tractor sales (>50 hp) per dealer: 5.8**





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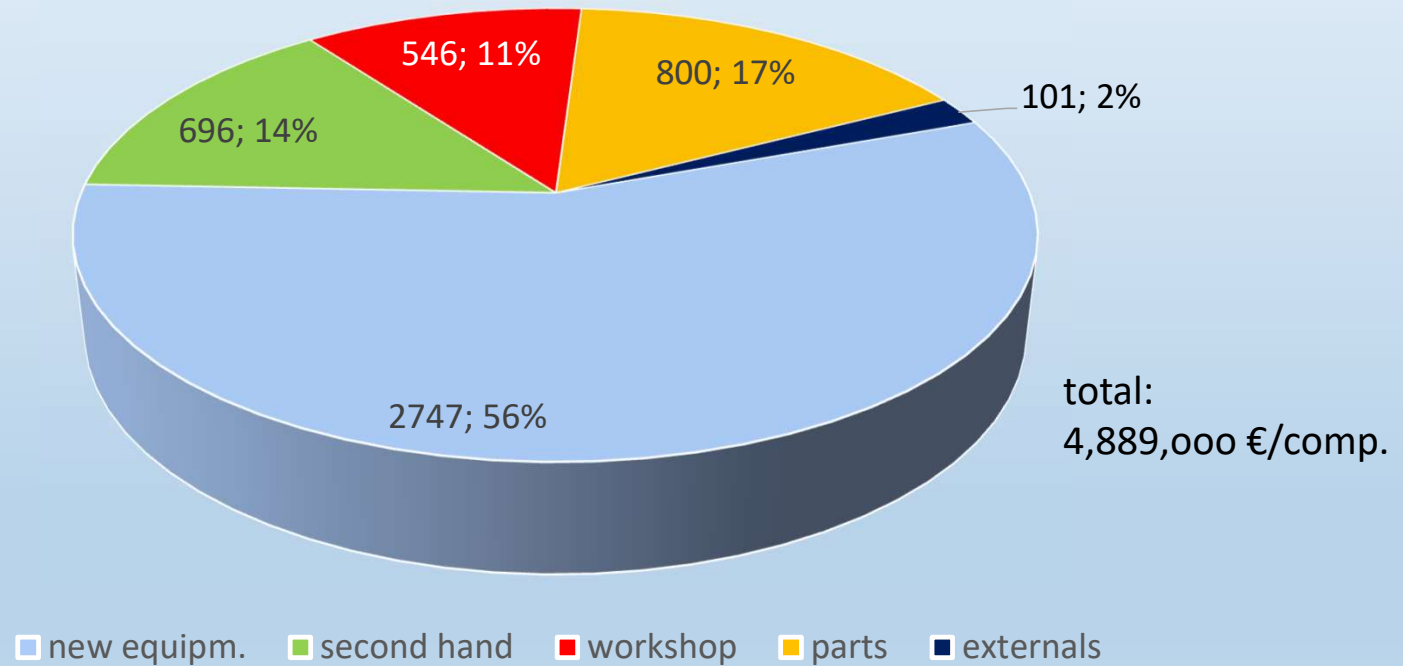
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survey-participation in % - part „companies´ structures“:
all members are on a good way

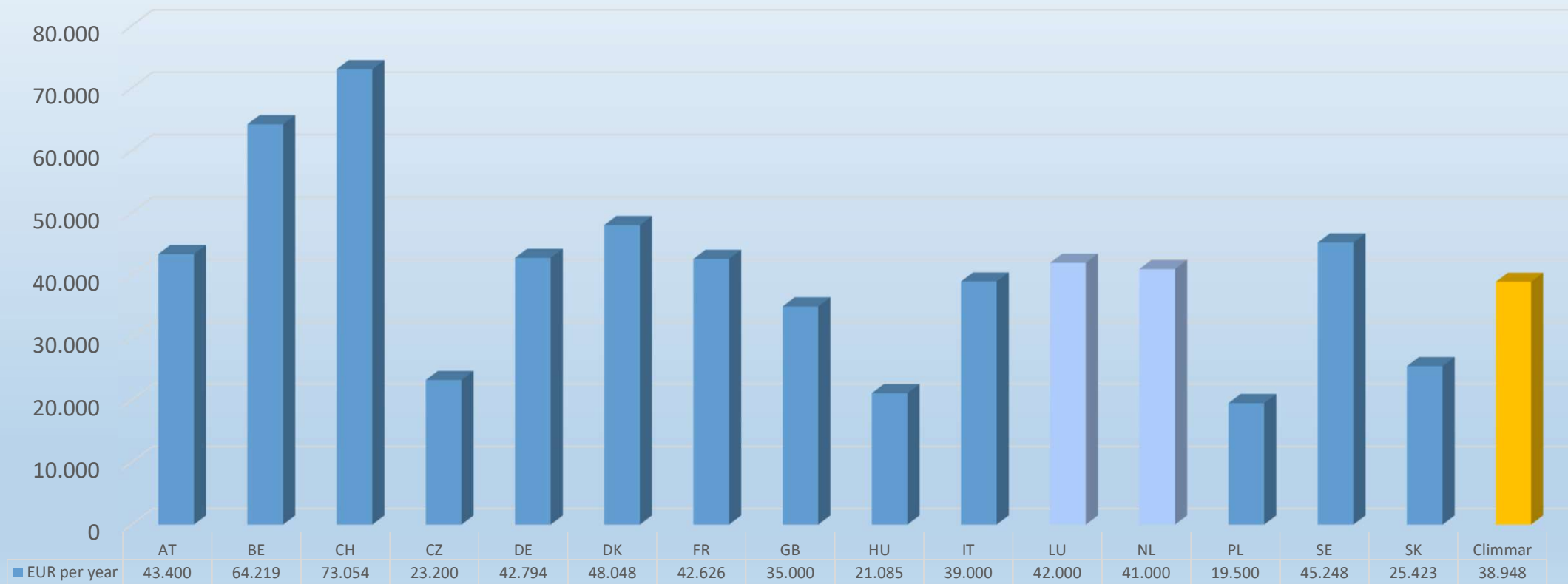
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	participation tendency:	➡	➡	➡	➡	➡	➡	➡	➡	➡	➡	➡	➡	➡	➡	➡	➡	
	1) free to fulfill survey part																	

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



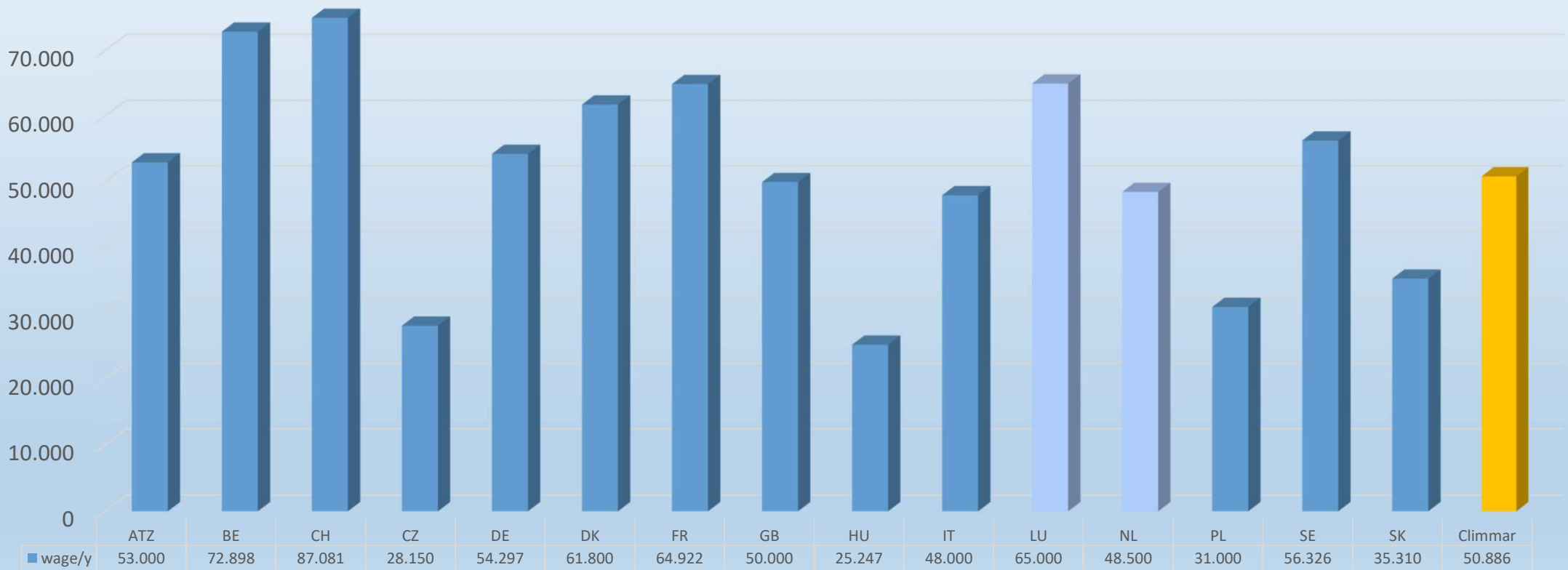


wage per year (average mechanic): **38,900 €**



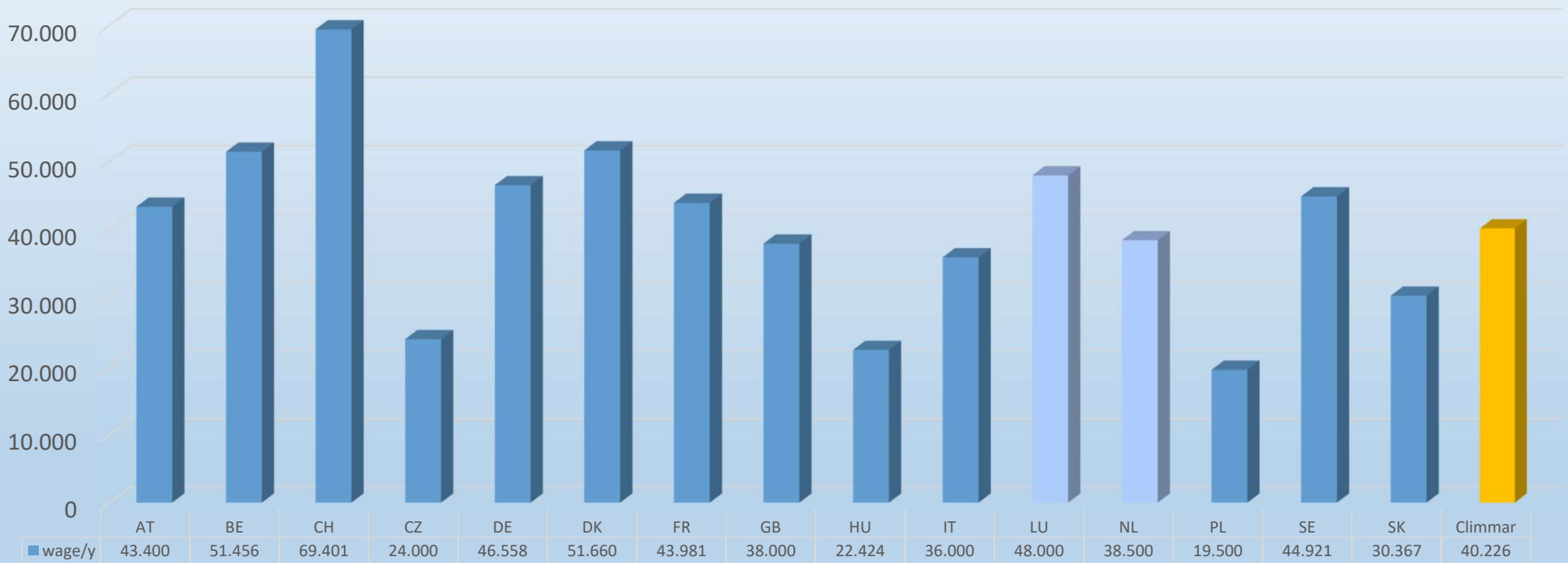


wage per year (workshop-master): **50,900 €**



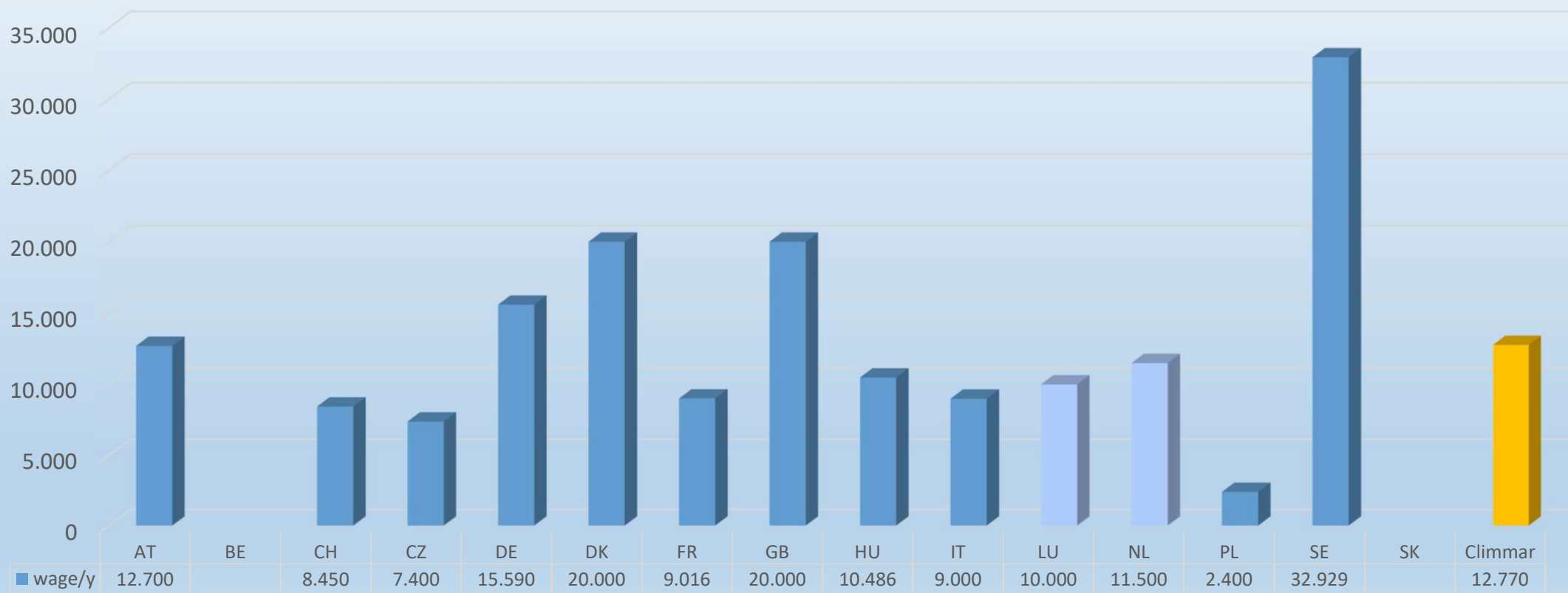


wage per year (partsman): **40,200 €**



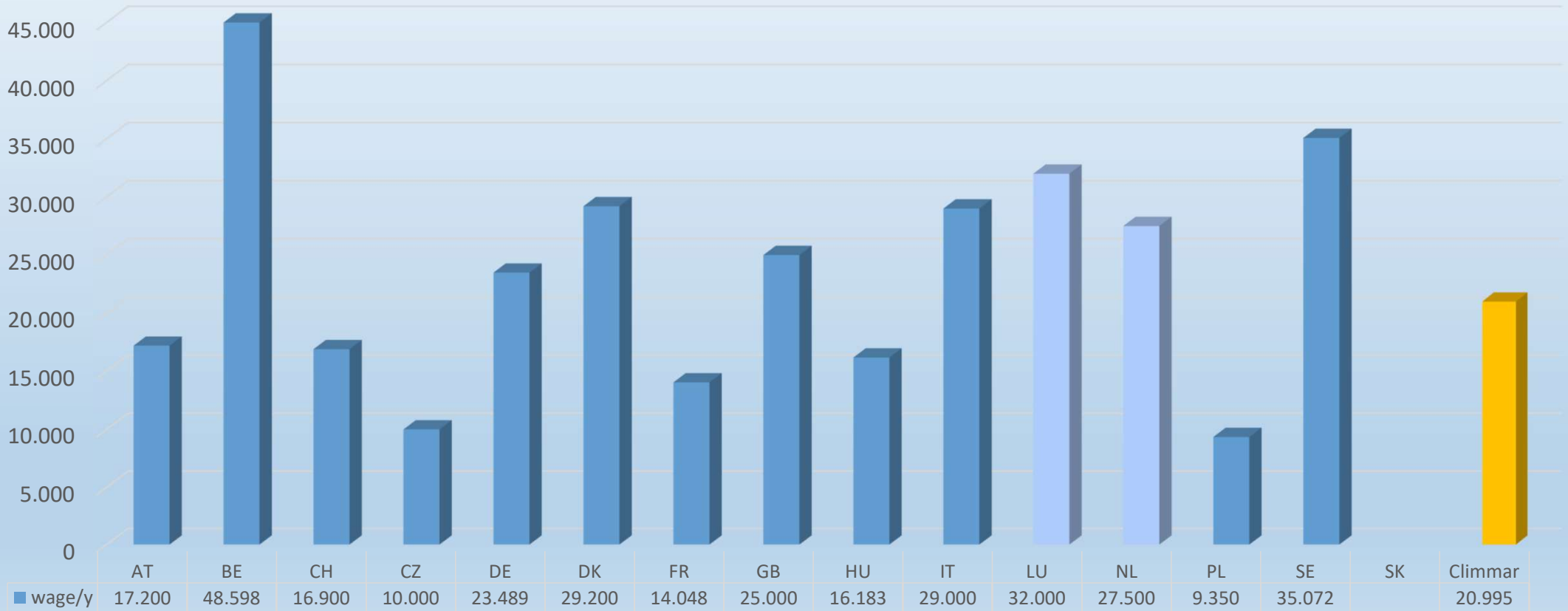


wage per year (apprentice, 1st year): **12,800 €**

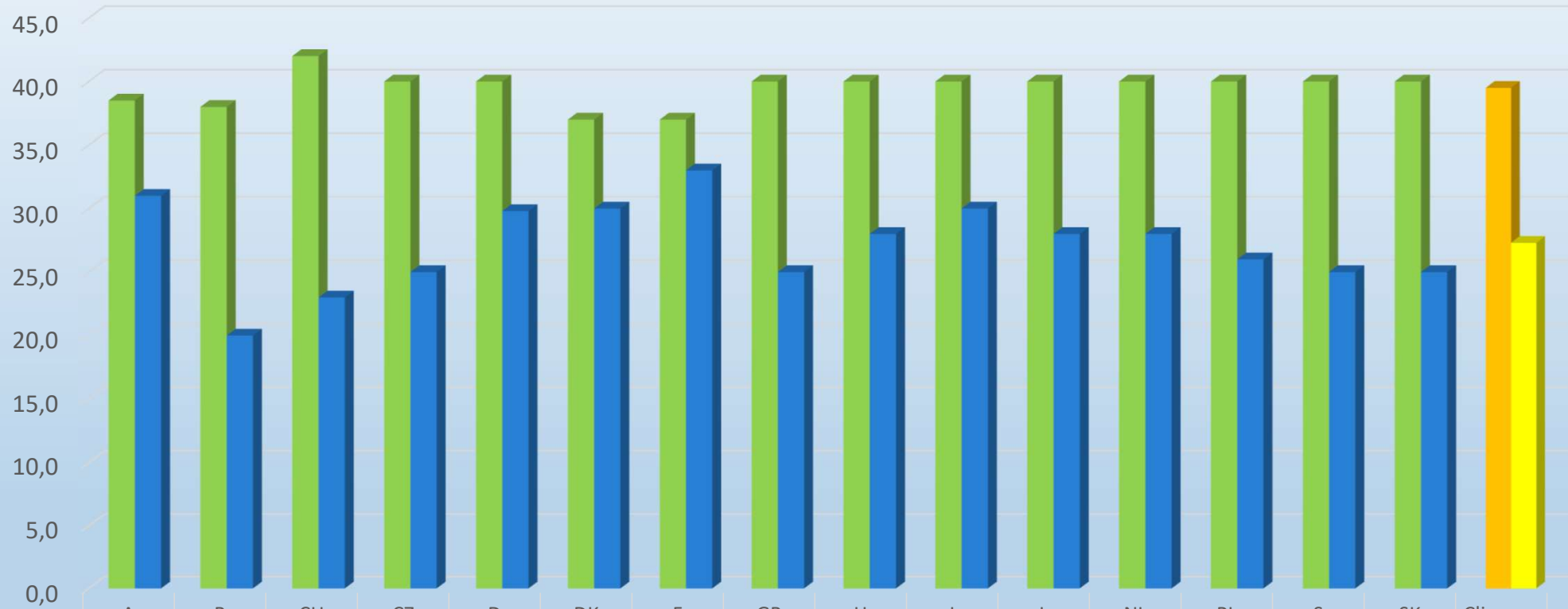




wage per year (apprentice, 4th year): **21,000 €**



working-hours per week / holidays per year



	A	B	CH	CZ	D	DK	F	GB	H	I	L	NL	PL	S	SK	Climmar
workinghours / week	38,5	38,0	42,0	40,0	40,0	37,0	37,0	40,0	40,0	40,0	40,0	40,0	40,0	40,0	40,0	39,5
holidays / year	31,0	20,0	23,0	25,0	29,8	30,0	33,0	25,0	28,0	30,0	28,0	28,0	26,0	25,0	25,0	27,3



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CLIMMAR Branch Report: Warranty & Manufacturer conditions	<i>fictional example</i>	Country 1	Country 2 ...
For warranty-work dealers get what average wages / hour? (in €)	€ 65,-		
That is how much % of his own tariff? (in %)	85%		
Is the wage based on: real needed time or on brand´s timetable-list? (real / list)	<i>real</i>		
Is there the time for error-diagnostic included? (yes / no)	<i>yes</i>		
How are spareparts / components refunded? (general rule)	<i>Price list less dealer discount plus mark-up (bonus table)</i>		
Is there any obligation to store old components? (if yes: what conditions? / no)	<i>Yes, pending acceptance by Technical Field Support</i>		
What are the conditions for reimbursed of freight-costs for procurement of spare parts and back-sending of old parts? (general rule?)	<i>Lump sum in annual bonus</i>		
How are transport (from field to workshop) and rescue costs reimbursed? (general rule)	<i>100% if presenting an external bill</i>		
What are the costs of online access or the necessary software / interfaces / technical support? (in € per year)	€ 1.500,-/a		
What are the costs of special tools / diagnostic equipment from your brand? (in € per year)	<i>about € 5.000,- per unit</i>		
What is the participation of the brand in the case that you have to provide replacement machines? (average rule)	<i>none</i>		
What time after the damage do you have to submit a warranty claim? (in months, weeks, days or hours)	<i>max. 30 days after repairs completed</i>		
If there is a minimum-limit ("vetting") below which a warranty-case needs no approval, up to what amount per case? (in €)	€ 200,-		
If there is an maximum-limit above which one must first get a "go" from the brand, from what amount? (in €)	€ 2.500,-		
Within what period of time after submitting / sending is the warranty claim processed?	<i>24 hours min., 4 week max.</i>		
Did the brand change the remuneration model within last 2 years? (if yes: which changes / no)	<i>2,50 € in 06/2022 for all</i>		



CLIMMAR Branch Report:
Warranty & Manufacturer conditions

1st of July 2022

	A	B	CH	CZ	D	DK	F (DF / SLH)	GB	H	I (DF / SLH)	L (DF / SLH)	NL	PL	S	SK (DF)
For warranty-work dealers get what average wages / hour? (in €)		€42,- depends on service level			58,5 to 60,10€		46 €			34,00 €	41			€ 87,60	35
That is how much % of his own tariff? (in %)		80%			85 to 88%		78			90	50%			100%	100
Is the wage based on: real needed time or on brand's timetable-list? (real / list)	depend				list, sometime real times		brand's timetable-list			timetable list	real/list			LIST	the real time can be compromised
Is there the time for error-diagnostic included? (yes / no)							no			no	yes/no			NO	No
How are spareparts / components refunded? (general rule)							Price list less dealer			Price list less dealer discount plus mark-up				PRICE LIST LESS DEALER DISCOUNT	just cost price of the parts
Is there any obligation to store old components? (if yes: what conditions? / no)	Yes, pending to COVID th													YES, PENDING ACCEPTANCE BY SUPPORT	Yes, pending acceptance by technical inspector
What are the conditions for reimbursed of freight-costs for procurement of spare parts and back-sending of old parts? (general rule?)															ys the costs
How are transport (from field to workshop) and rescue costs reimbursed? (general rule)	100% if														ally none
What are the costs of online access or the necessary software / interfaces / technical support? (in € per year)															1500
What are the costs of special tools / diagnostic equipment from your brand? (in € per year)		about € 4.000,-													t 3500€ per unit
What is the participation of the brand in the case that you have to provide replacement machines? (average rule)	none	no													usually none
What time after the damage do you have to submit a warranty claim? (in months, weeks, days or hours)	max. 28 days after repairs completed	30 days after repair			30 days after order										4 days after repairs completed
If there is a minimum-limit ("vetting") below which a warranty-case needs no approval, up to what amount per case? (in €)	warranty claim none policy claims € 690,- material	no			official not / 250,00 €		0 €								no
If there is an maximum-limit above which one must first get a "go" from the brand, from what amount? (in €)	when changing big components, like engines, transmissions in exchange mode	no			official not, but starting at ca. 2000 € possible (Kulanz)		non			no	There is no maximum				
Within what period of time after submitting / sending is the warranty claim processed?	1 week until 6 months. depends on claim type. recall (1.level) or policy claim (last level)	5 months			1 to 12 weeks		3 WEEKS			2-4 week	goodwill request can be up to 12 weeks			4 WEEK MIN 16 WEEK MAX	
Did the brand change the remuneration model within last 2 years? (if yes: which changes / no)	no	no			no		no			no	no			NO	

Example (old): **XXXXX**

warranty conditions available – from which countries for which brands, 1st of Juli 2022

		A	B	CH	CZ	D	DK	F	GB	H	I	L	NL	PL	S	SK	sum
<i>warranty-conditions in details are available (in English) for these brands from these countries</i>	JD	X	X	X		X	X	X	X			X			X	X	10
	NH	X	X	X	X	X	X	X				X			X	X	10
	Claas	X	X	X	X	X	X	X	X			X			X		9
	MF	X	X	X			X	X				X			X	X	9
	SDF	X	X			X	X	X			X	X			X	X	10
	Case	X	X	X	X	X	X	X				X				X	10
	Valtra	X		X		X	X	X				X				X	8
	Fendt	X	X	X		X	X	X				X				X	9
	Kubota	X	X	X					X	X					X	X	7
	JCB	X		X		X						X				X	6

red: from 2020
green: 2021
blue: 2022
black: 2023

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Surveys 2024: Wishing us a tremendous participation

The collage displays several survey report pages. The leftmost page, 'markets and structures', features a bar chart for 2022 with categories like 'number of companies in our branches' (7,091), 'number of exclusive tractor-brands dealers' (399), and 'market segments (registrations or sales)'. The middle page, 'companies average data', lists metrics such as 'new equipment' (1,750), 'second hand equipment' (300), and 'total turnover' (2,042). The rightmost page, 'Branch-Trends and -Expectations', includes a table for 'Comparison to same periods 1987 year: July - December 2022' with columns for 'Turnover total', 'Turnover Machinery', 'New machinery', and 'Second hand machinery'.

starting in Feb. 2024 (trends 1), June 2024 (trends 2), July 2024 (rest)



ideas for projectteam 2:

- Analysis of A-/B-dealers per brand:
turnover, staff, sales
- ...
- ...

Thank you for your audience

Projectteam Markets & Data

