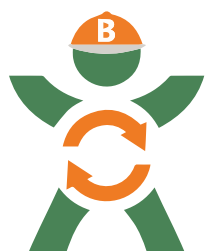




CLIMMAR REPORT OF ACTIVITIES 2018 – 2019





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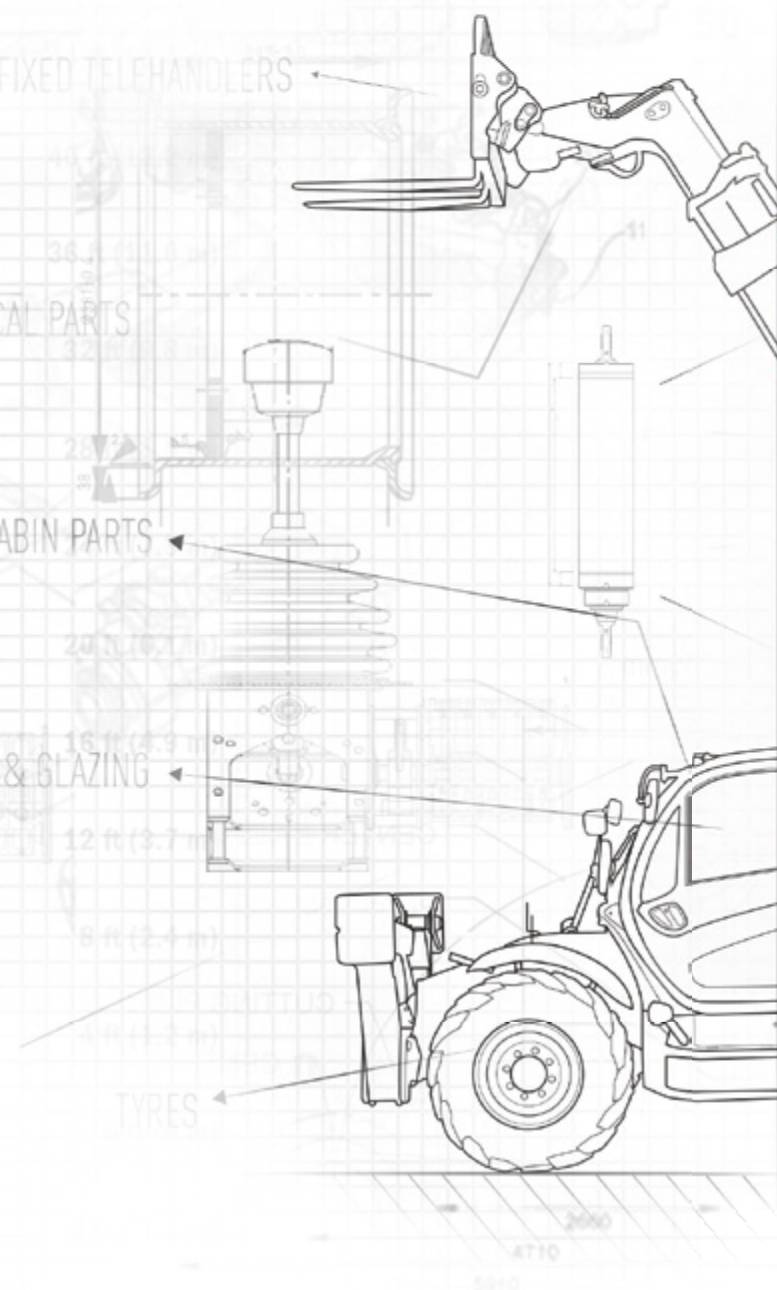
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Delighted to Meet You

Thank you for your interest in CLIMMAR. CLIMMAR is the international organisation for merchants and repairers in the agricultural and garden machinery sector. In this way we currently unite 16 national associations in Europe to support almost 160,000 dealer employees in giving the best possible service to more than 3.4 million farmers. Farmers are constantly challenged to produce food to the lowest possible price with respect for our environment. This directly reflects on dealer companies. They are there 24/7 to help customers meet their deadlines when a machine breaks down. They support and advise them with knowledge of their specific situation on how to preserve their soils, increase their yields and at the same time minimise the impact on the environment. They give feedback to suppliers on how to develop new techniques and machines to make this possible. They do this on a low profile every day and they are proud to be a vital part of our industry.

In CLIMMAR we respect the autonomy of our national members and seek to support them in lobby, data sharing and best practices. The fast changes in our industry and the more and more centralised legislations and laws make this task increasingly important. We are faced with unified European contracts from suppliers, we are faced with European legislation on farmer support, vertical agreements, machine homologation, repair and maintenance information and so on. These issues affect our day to day business and in some cases will even change the way we do business. On a national level you can follow these items but you cannot influence them. That is why we work together as CLIMMAR.

For this we always strive for cooperation with different stakeholders. If we understand each other's needs, we can work together with our different interests in mind.

I am proud that we have made big steps on this over the last years. Various examples are presented and shared in this report of activities. On the ISO normalisation we are actively involved in defining the way that we get access to

repair and maintenance information. As this is the heart of the repair companies, it's a top priority for CLIMMAR. We have seen the result of this legislation in the car industry, and now it will affect our industry significantly.

On the issue of big data, we are involved in the evolution of the EU Code of Conduct on Agricultural Data Sharing and also co-signed the code. The use of big data is rapidly increasing but adequate and sufficient knowledge on what we can or cannot do with these data is vital to our business.

The rapid developments on engine regulations and smart farming stress the education systems in our members' nations to the max. It is very hard or even almost impossible to maintain the know-how of mechanics, sales people and parts managers on a sufficient level. In CLIMMAR, we work together and support the national education body's in this work.

The dealer satisfaction index DSI has become a marking point in the relationship between dealers and the larger tractor brands. More and more we are able to discuss the results of the survey with the manufacturers on an international level to seek for mutual understanding and improvement. Please take note of the results of these discussions in this report of activities.

The brand new and unique CLIMMAR index gives insight in the European economic situation for trade and repair. In this way it is unique because there is no other index that monitors and forecasts the European economic situation on the trade and repair of agricultural machinery. We consider it as our branches economic barometer and we believe it gives a more realistic view on the actual situation for our members.

Please have a look on what CLIMMAR is doing and maybe what we can cooperate on it... We are delighted to meet you!

Climmar Presidency



PRESIDENT
Erik Hogervorst (NL)



SECRETARY-GENERAL
Jelle Bartlema (NL)



VICE-PRESIDENT
Joost Merckx (B)

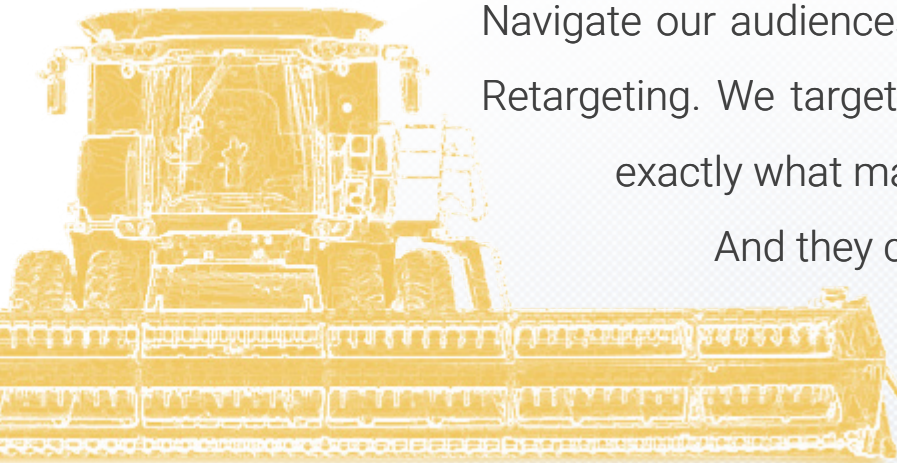


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VICE-PRESIDENT
Pierre Prim (F)

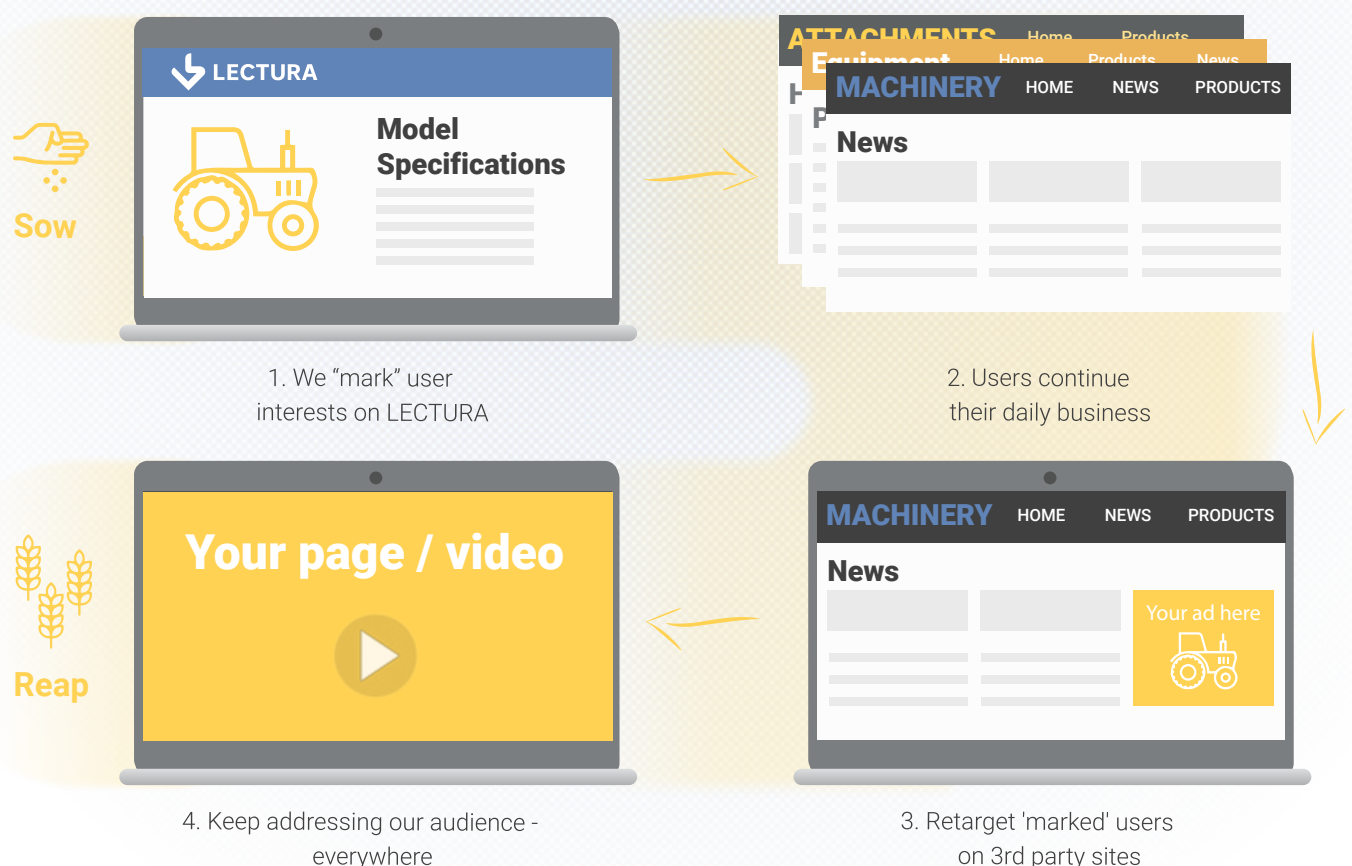
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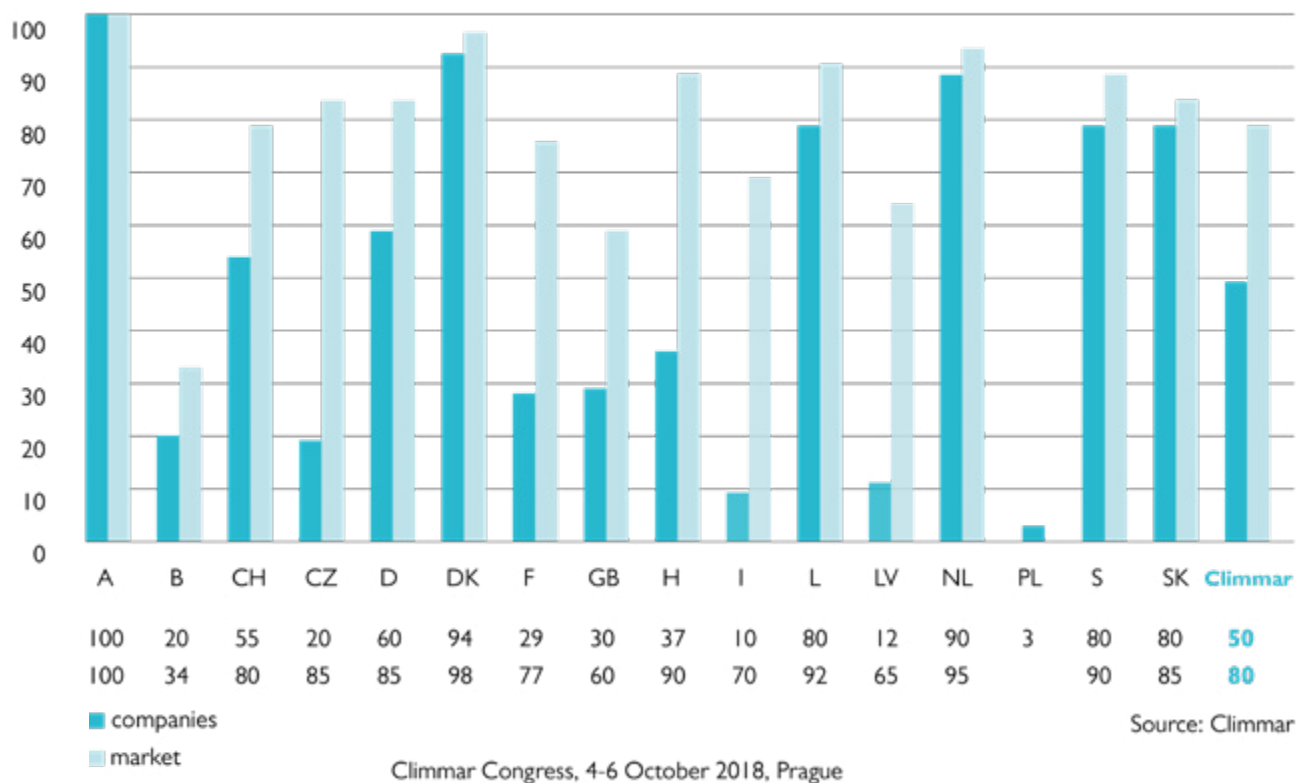


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Our Sector in Figures

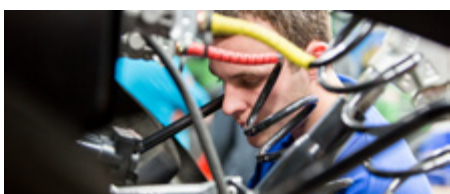


The degree of organisation in CLIMMAR member countries is very different. On average, 50% of all companies in Europe is organised in national associations (that are member of CLIMMAR). They represent 80% of the market.



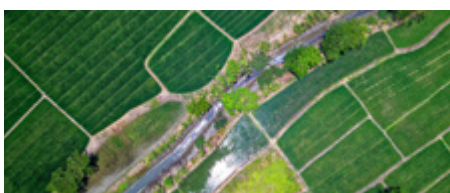
19,185 Dealers

16 CLIMMAR members represent a total of 19,185 dealers and distributors across Europe.



158,799 Dealer Employees

19,185 dealers and distributors represent a total of 158,799 dealer employees.



3,460,077 Farmers & 1,951,382,188 Hectares

19,185 dealers and distributors and their 158,799 employees service 3,460,077 farmers who farm 1,951,382,188 hectares of land.

Our Member Nations

Austria (ARGE Landtechnik)

Total number of dealers	1,000
Total number of dealer employees	7,300
Number of farmers	135,000
Average farm surface area (ha)	30

ADDRESS

Wiedner Hauptstr. 63, A-1045 Wien, Austria

PHONE

+43 5 90 900-3312

E-MAIL

maschinenhandel@wko.at

WEBSITE

www.wko.at/landtechnik



Belgium (FEDAGRIM)

Total number of dealers	320
Total number of dealer employees	1,900
Number of farmers	36,000
Average farm surface area (ha)	37

ADDRESS

Avenue Jules Bordetlaan 164 b 4, 1140 Brussels, Belgium

PHONE

+32 2 262 06 00

E-MAIL

gert@fedagrim.be

WEBSITE

www.fedagrim.be



Czech Republic (SDZT)

Total number of dealers	310
Total number of dealer employees	1,940
Number of farmers	48,119
Average farm surface area (ha)	83

ADDRESS

Šumavská 31, CZ 602 00 Brno, Czech Republic

PHONE

+420 541 235 256

E-MAIL

sdzt@post.cz

WEBSITE

www.sdzt.cz



Denmark (DM)

Total number of dealers	400
Total number of dealer employees	5,000
Number of farmers	42,099
Average farm surface area (ha)	63

ADDRESS

Kokholm 3C, DK-6000 Kolding, Denmark

PHONE

+45 3927 0087

E-MAIL

dmh@danskmaskinhandel.dk

WEBSITE

www.danskmaskinhandel.dk



France (SEDIMA)



Total number of dealers	2,700
Total number of dealer employees	35,000
Number of farmers	490,000
Average farm surface area (ha)	56

ADDRESS

6, boulevard Jourdan, 75014 Paris, France

PHONE

+33 01.53.62.87.00

E-MAIL

anne.fradier@sedima.fr

WEBSITE

www.sedima.fr



Germany (LandBauTechnik - Bundesverband)



Total number of dealers	4,300
Total number of dealer employees	42,500
Number of farmers	290,000
Average farm surface area (ha)	57

ADDRESS

Ruhrallee 80, D-45136 Essen, Germany

PHONE

+49 201 89624-0

E-MAIL

info@landbautechnik.de

WEBSITE

www.landbautechnik.de



Hungary (MEGFOSZ)



Total number of dealers	170
Total number of dealer employees	3,000
Number of farmers	200,000
Average farm surface area (ha)	25

ADDRESS

Páter Károly u.1. Aula 129 - H-2100 Gödöllő, Hungary

PHONE

+36 205 100 417

E-MAIL

info@megfosz.com

WEBSITE

www.megfosz.com



Italy (UNACMA)



Total number of dealers	1,900
Total number of dealer employees	8,300
Number of farmers	1,500,000
Average farm surface area (ha)	8

ADDRESS

Via Spinoza 28, 00137 Rome, Italy

PHONE

+39 06 87420010

E-MAIL

segreteria@unacma.it

WEBSITE

www.unacma.it



Our Member Nations

Latvia (LTRTA)



Total number of dealers	258
Total number of dealer employees	1,945
Number of farmers	58,496
Average farm surface area (ha)	29

ADDRESS

Republic Square 2, Office 922, LV-1010 Riga, Latvia

PHONE

+371 27853206

E-MAIL

birojs@ltrta.lv

WEBSITE

www.ltrta.lv



Luxembourg (FEMAL)



Total number of dealers	17
Total number of dealer employees	175
Number of farmers	1,500
Average farm surface area (ha)	65

ADDRESS

2, Circuit de la Foire, Internationale, L-1347, Luxembourg-Kirchberg

PHONE

+352 4245 111

E-MAIL

f.engels@fda.lu

WEBSITE

www.femal.lu



Netherlands (Fedecom)



Total number of dealers	706
Total number of dealer employees	5,789
Number of farmers	53.900
Average farm surface area (ha)	33

ADDRESS

Einsteinbaan 1, 3439 NL, Nieuwegein, The Netherlands

PHONE

+31 30 6049111

E-MAIL

secretariaat@fedecom.nl

WEBSITE

www.fedecom.nl



Poland (PIGMiUR)



Total number of dealers	3,100
Total number of dealer employees	12,000
Number of farmers	230,000
Average farm surface area (ha)	8

ADDRESS

ul. Poznańska 118, 87 – 100 Toruń, Poland

PHONE

+48 56 651 47 40

E-MAIL

biuro@pigmur.pl

WEBSITE

www.pigmur.pl



Slovakia (AGRION)



Total number of dealers	49
Total number of dealer employees	800
Number of farmers	23,600
Average farm surface area (ha)	81

ADDRESS

Rybárska 37, 94901 Nitra, Slovakia

PHONE

+421 911 986 603

E-MAIL

agrion@agrion.sk

WEBSITE

www.agrion.sk



Sweden (MaskinLeverantörerna)



Total number of dealers	115
Total number of dealer employees	1,800
Number of farmers	63,000
Average farm surface area (ha)	42

ADDRESS

P.O. Box 22307, 104 22 Stockholm, Sweden

PHONE

+46 8 508 938 80

E-MAIL

info@maskinleverantorerna.se

WEBSITE

www.maskinleverantorerna.se



Switzerland (Agrotec Suisse)



Total number of dealers	840
Total number of dealer employees	6,350
Number of farmers	52,263
Average farm surface area (ha)	20

ADDRESS

Chräjeninsel 2, CH-3270 Aarberg, Switzerland

PHONE

+41 32 391 99 44

E-MAIL

agrotecsuisse@amsuisse.ch

WEBSITE

www.agrotecsuisse.ch



United Kingdom (BAGMA)



Total number of dealers	3,000
Total number of dealer employees	25,000
Number of farmers	223,000
Average farm surface area (ha)	77

ADDRESS

225 Bristol Road, Edgbaston, Birmingham, West Midlands, B5 7UB

PHONE

+44 1295 713344

E-MAIL

info@bagma.com

WEBSITE

www.bagma.com



Our Position on Smart Farming

This position paper represents the official position of CLIMMAR and its 16 member nations on Smart Farming: integrated internal and external networking of farming operations where machines and devices are linked to growing processes of plants and animals



Smart Farming promises long-term, growing business opportunities for farmers. Therefore, European dealers urgently need to pick up these opportunities by facilitating farmers to adopt and join Smart Farming (techniques). CLIMMAR promotes and facilitates implementation and growth of Smart Farming, by taking the next positions:

1. **Awareness** by dealers **on the impact of Smart Farming** needs to be supported
2. **Focus** needs significantly be shifted **towards the optimal integration of farm machinery into the production system** (process optimisation.) Ag machinery should be (highly) compatible especially concerning ICT-linking
3. It is important to obtain - provided the end user agrees - **access to farm machinery-related data**. There should be an independent business role for the dealer to

exchange data (RMI, telematics) with manufacturers and to advise farmers and contractors

4. **Dealers** (and manufacturers) of agricultural machinery will **have to network with data portals**, so as to provide the possibility of data exchange. If necessary, portals can also be offered by manufacturers/dealers themselves

- a. Specific benefits can be provided by the utilisation of data portals
- b. For dealers of agricultural machinery, networking with a data portal can also provide additional advan
- c. Urgently required is a Code of Conduct for data exchange between links in the agri-food chains

5. **EU decision-makers** and national governments **need to ensure** that/to

a. **The fundamental digital infrastructure** for rapidly growing data flows in terms of network coverage and transmission rates in rural areas. 100% digital connectivity in rural areas and mobile broadband availability all over the rural areas in EU

b. **Boost farmers' ability to invest in innovative** digital technologies and equipment

6. **Dealers**, manufacturers, famers and contractors **need communication and interface standards** that facilitate vertical and horizontal communications i.e. permit data exchange between machines, business partners, as well as different data portals and platforms

7. **Ensure** that the necessary **digital and technical skills** are developed

8. **Elaborate new business models for dealers**. For example, a service concept for advising on analysis and information from data

CLIMMAR starts 4 initiatives that will ensure results for the national member-organisations and dealers in the EU.

1. **Establish awareness-project** and pilots for dealers to get access to and participate in Smart Farming

- Access to EU- and national programs and projects for development of Smart Farming

2. **Speeding up EU-regulation on RMI:** dealers getting access to RMI data and diagnostic tools

3. **Participate in round table with other stakeholders** on the Code of Conduct on Data Exchange

4. Start a **Think Tank on “Smart farming and new business models”** for Dealers

- Select Universities, Academies and Colleges in Europe that will provide students which will assign for specific investigations on Smart Farming



Activity: position paper on Smart Farming

CLIMMAR representative: Gerard Heerink (NL)

Main targets: activate dealers to pick up opportunities by facilitating farmers to adopt and join Smart Farming, support initiatives for data exchange and high-speed rural internet access, ensure that the necessary digital and technical skills are developed

Our View on Dealer Contracts

As CLIMMAR, we have reflected our view in a paper on the matter of dealer contracts. In our view, the contracts between suppliers and dealers are in general unbalanced and drafted too unilaterally. CLIMMAR does not seek to explain the legal aspects of contract law or torts in this view, but to seek an overall more equitable long-term future for the dealer or distributor and their suppliers.

We are aware of the fact that the EU Commission has recently started the process of making an evaluation of the existing EU rules on vertical agreements (Vertical Block Exemption Regulation) which will expire on 31 May 2022. In this process, there is an increased focus on exclusivity and competition clauses in relation to internet trade. This as part of the EU Commission's initiative to ensure a Digital Single Market Strategy. Since we don't know what the final new rules eventually will be, we for now just express our view on the general feeling of unbalanced and too unilaterally drafted contracts between suppliers and dealers.

As long as suppliers and dealers have existed, there has been conflict within the relationship that has led to difficulties with operating a successful dealership with a strong and secure future. Trust and loyalty are the fundamental ingredients for a stable and profitable relationship and if this does not exist between a supplier and a dealership, the future relationship will not survive changes or difficulties. We need to reach a situation where suppliers and dealers are more equal. Today it is simply too unbalanced. We seek an equal business relationship - with mutual respect.

Some points to consider as we see it:

Long-term exclusive contracts

- Should be on an exclusive basis to support the dealer
- Should secure a more equal business relationship between dealer and supplier

The discussion on the termination clauses is two-sided. On paper, a 12-months' notice sounds better than a 3-months.

But in reality, it doesn't matter as long as the contracts are non-exclusive. The supplier can at any time appoint a new dealership across the road. So, really the discussion should be on the terms and conditions.

There are various clauses that can be included in contracts within a legal frame work which can benefit or disadvantage a dealer or distributor. These clauses, such as Intuitu Personae, should be studied very carefully and objected to if they do not suit the long-term objectives of the dealer or distributor agreement.

- The dealer should be free to set up as many businesses as he wants to
- In specific cases, it should be possible for the dealer not to take on a full line of machinery

Termination clauses

- Realistic clauses with exclusive rights
- Finance/bank

The banks are considering dealers as agents in a market. In addition, the banks are focusing more on the contractual issues between manufacturer and agent. If a dealership has a €10 million obligation in a bank and a 6-month termination clause (or in reality a day-to-day notice) from a supplier covering 90% of the business, yes that's the problem in a nutshell. Banks are getting more aware on this crucial issue.

Compensation

- Financial compensation based on initial and on-going investments
- Stock and parts return

Compensation can come in the form of unused whole goods being returned for a cost credit, parts being returned under a parts return programme at a discounted rate. It will rarely cover cost of specialist tools, signage, investment in training or lost profit from future secured sales and service activities.

There needs to be a clear policy to determine compensation for the dealer based on the perceived value of the customer goodwill, market penetration and turnover of the supplier's whole goods and service support income generated by the outgoing dealer.

Open to dialogues

Naturally, dealers and distributors must be professional and suppliers have every right to set reasonable demands for selling their products, concepts and services. The business relationship however must be equal and reasonable. CLIMMAR therefor sincerely invites and encourages all suppliers to open up the dialogue towards balanced dealer contracts reflecting an equal business relationship.



Activity: collaboration between dealers

CLIMMAR representative: Klaus Nissen (DK)

Main targets: an overall more equitable long-term future for the dealer or distributor and their suppliers, equal and reasonable business relationships between dealers and suppliers

Active Lobbying for Concrete Results

CLIMMAR is actively involved in European (EU) and ISO working groups and standardisation because many different national laws and regulations are very connected to EU law and standards and because we all want to be on the same page. Many governments and public administrations are therefore reflecting the EU laws, regulations and norms so that each country have the same opportunities and restrictions as the countries they are living next to and or do business with. So - if CLIMMAR wants to have any chance to join the work regards making or adjusting these local laws, regulations and standards - then the best place to do the work, is within the EU system.

One of these EU laws is the new type approval regarding tractors and agricultural machines type R and S. Also known as number I67/2013-EU or Tractor Mother Regulation (TMR). This new type approval is regulating many, many things that manufacturers have to take in consideration when they produce either a tractor or an agricultural machine of either type R or S. Most EU civil servants and parliamentarians are not at all familiar with the different types of machines operating in the agricultural sector and especially not what kinds of challenges the machines and operators face when working, combined with all the different local laws all around in the EU. Many of them consider tractors equal to trucks and for them it seems logical that 'our' machines have to obey the same rules and regulations as trucks.

Involved in law making

To prevent these EU decisionmakers from unknowingly accepting laws and regulations with too many unwanted and costly implications, expert groups lobby and assist them in balancing needs and obligations. One of these expert

groups is called WGAT, the Working Group on Agricultural Tractors. This expert group is cooperating with the EU in the creation and execution of this new type approval I67/2013-EU. In order to serve the interest of dealers and distributors in the making of the EU type approvals for tractors and agricultural machines type R and S, CLIMMAR has decided to join the WGAT.

One very important part of the EU I67/2013 Mother Regulation is regarding the so-called Repair and Maintenance Information (RMI) which states that technical (RMI) information should be free available in a standardised and non-discriminatory way. This to provide for a level play-field between authorised (brand) repairers and brand independent repairers in the accessibility of the technical RMI information of the tractors and machines. Because of the lack of "non-discriminatory" outcome of the RMI working group in the first attempts to come to a Standard within the European Committee for Standardisation (CEN), the process to create the standards for RMI has been shifted towards a global international standard within the ISO framework. CLIMMAR has decided to join the ISO Working group regarding the RMI project, to lobby and create awareness about these RMI issues.

Furthermore, the EU is also planning to make a common type approval for the Non-Road Mobile Machinery (NRMM) and therefore a new working group is coming up in which CLIMMAR will also participate.

Our technical representative in these working groups is Per Hedetoft from Denmark. He is involved on the technical level and is keen on defending the interests of the dealers and distributors in these often very complex legislative files.

Activity: lobby and law making

Involvement in: ISO working group on RMI (ISO-TC23-WG5) and Working Group on Agricultural Tractors (WGAT)

CLIMMAR representative: Per Hedetoft (DK)

Main targets: non-discriminatory and fair laws and regulations for European dealers and distributors



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Used equipment - Reporting
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Climmar Branch Reports: European Business Review and Outlook

CLIMMAR Branch Reports comprise of the conclusions of 10 questions asked to our 16 member countries on business developments and expectations. How was the business in the past half year and how will it look like in the current half year?

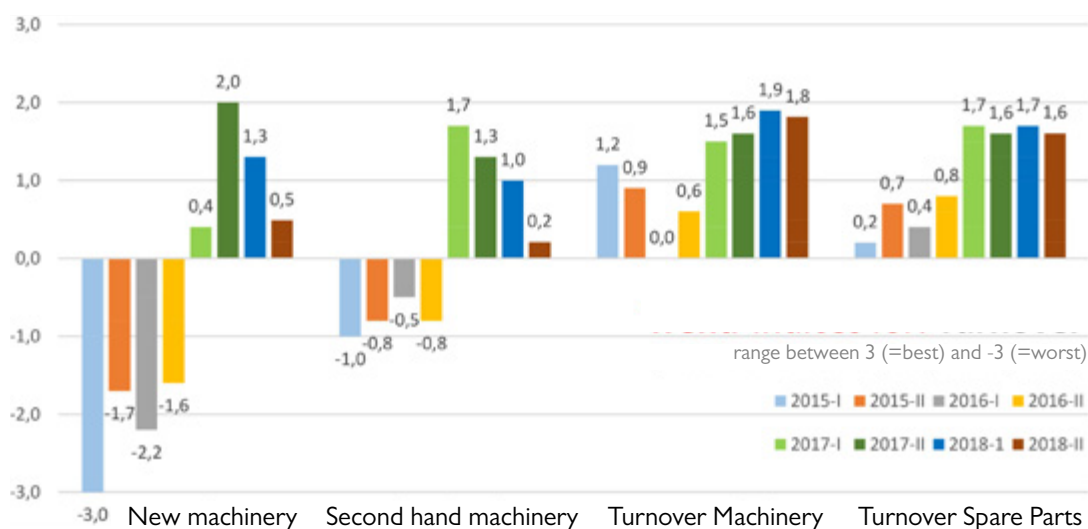
Business review

In the second half of 2018, European dealers and distributors increased their workshop and parts sales whereas the turnover coming from sales of new machinery decreased slightly on average. The review of turnover developments is summarised on the map of Europe using different colours.

Business outlook

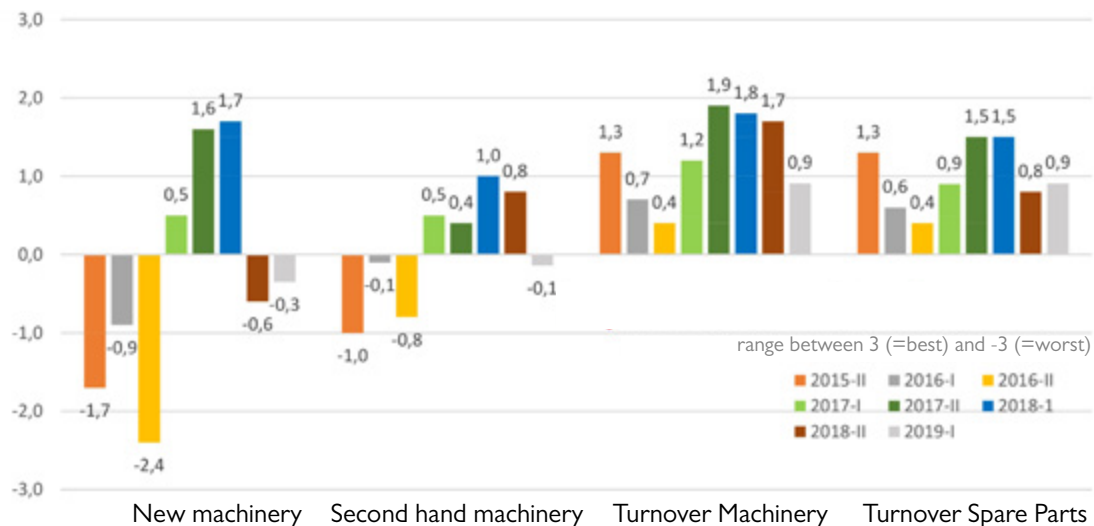
The business outlook describes the expectations European dealers and distributors have concerning their business in the first half year of 2019. The questions and charts have the same setup as the business review. The outlook shows that the sentiment under dealers and distributors has worsened in general compared to second half year of 2018.

Trend-Indices for: **Turnover**



Source: Climmar

Expectation-Indices for: **Turnover**



Turnover Trends and Expectations

I. **Development of turnover** in the second half of 2018, compared with the same period of 2017

Turnover **total** Turnover **new equipment** Turnover **workshop** Turnover **spareparts**



II. **Expectation of turnover** in the first half of 2019, compared with the second half of 2018

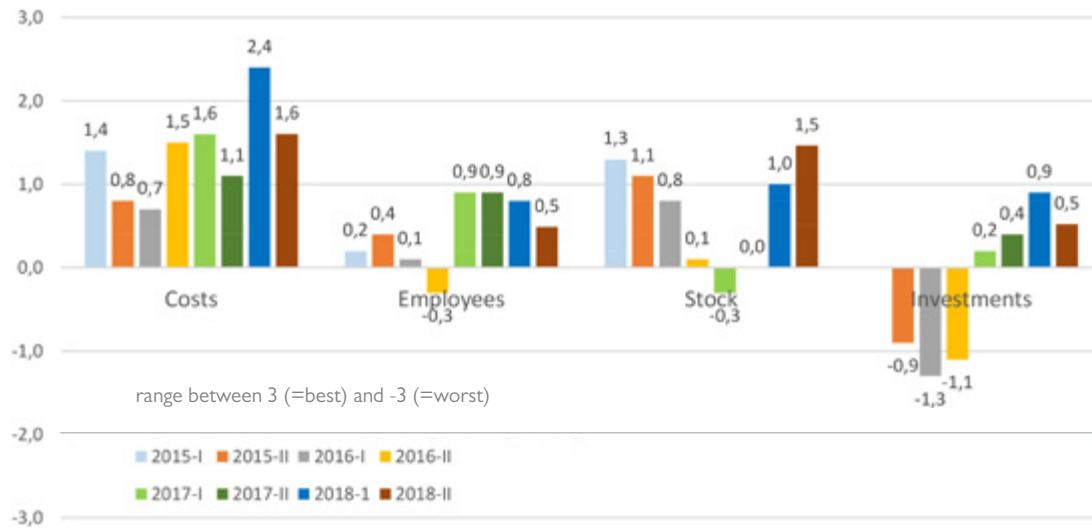
Turnover **total** Turnover **new equipment** Turnover **workshop** Turnover **spareparts**



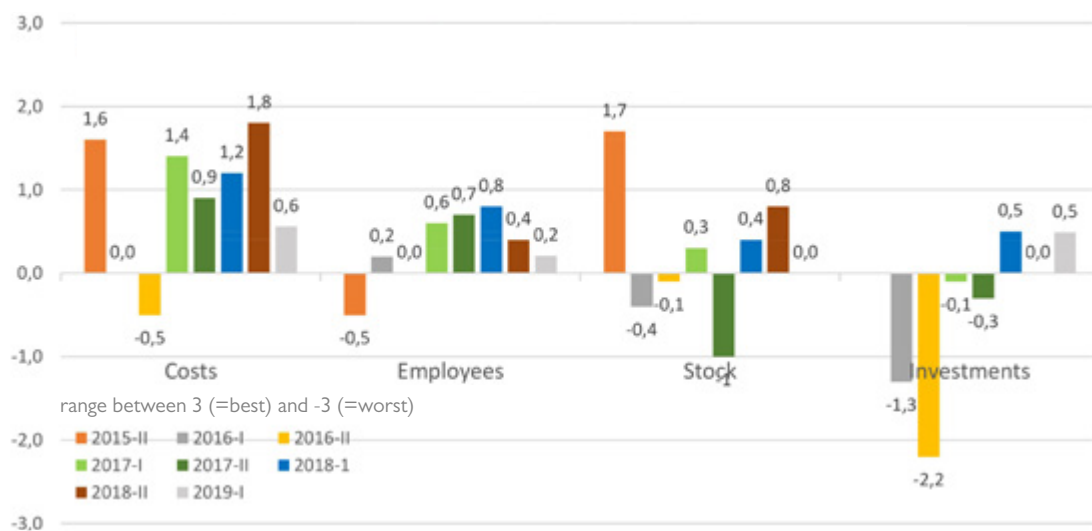
■ increase
 ■ equal
 ■ decrease
 ■ no answer

Source: Climmar

Trend-Indices for: Other developments



Expectations-Indices for: Other developemts



Source: Climmar

Climmar Index: The European Business Cycle in Just One Number

The **CLIMMAR Index** describes the current dealers and services situation in over 19,000 companies in 16 member countries at a glance in just one single number. Together, these companies have an annual turnover of €40 billion and employ almost 160,000 people.

In 2018, CLIMMAR created the new index that can move in a bandwidth between +3 (there everything would be best everywhere) to -3 (that would mean the absolute negative record). The content is derived from the half year branch report surveys published by CLIMMAR.

In the second half of 2018, the index climbed to +0.85 and this means that dealers and distributors are positive about their situation. The index climbed +0.24 points compared to the +0.61 figure for the first half of 2018. The main reasons for this increase are increased workshop and parts sales whereas the turnover coming from sales of new machinery decreased slightly.

Upward trend again

The CLIMMAR Index remained positive from the second half of 2016 after being negative before. The upward trend stalled after the second half of 2017, but the Index remained positive at +0.61 for the first half of 2018. This fits in well with the European branch development in 2018 of selling fewer and fewer machines in almost all of Europe with a healthy Spring followed by a very dry Summer that has limited dealer sales activities. For the second half of 2018, the index stood at +0.85 and based on the current knowledge, the outlook shows that the index has decreased to +0.45 for the first half of 2019.

Climmar-Index

(half-year-trendindex for ag-dealers and -service all over Europe)



Source: Climmar



Activity: CLIMMAR Branch reports and CLIMMAR Index

CLIMMAR representative: Ulrich Beckschulte (DE)

Main Target: To provide data and statistics from the European dealers sector

Climmar DSI

Since 2011, CLIMMAR annually investigates how its members, European dealers and distributors that officially represent tractor brands, evaluate their relationships with tractor manufacturers. This Dealer Satisfaction Index (DSI) is gaining more and more significance and leads to comprehensive discussions with tractor manufacturers.

The aim of the DSI survey and its publication is the improvement of relationships between tractor dealers and manufacturers and for the benefit of the concerned distribution networks, brands and end users. All participating countries, 11 in total, use the exact same questionnaire. In 2018 the countries participating were Austria, Belgium, Czech Republic, Denmark, France, Germany, Hungary, Italy, Netherlands, Poland and the United Kingdom. The overall European results were presented exclusively to the CLIMMAR members at the annual CLIMMAR Congress in October. After the Congress a press release was sent out to the media which was well pick-up and which led to some meetings with several tractor manufacturers on their specific results.

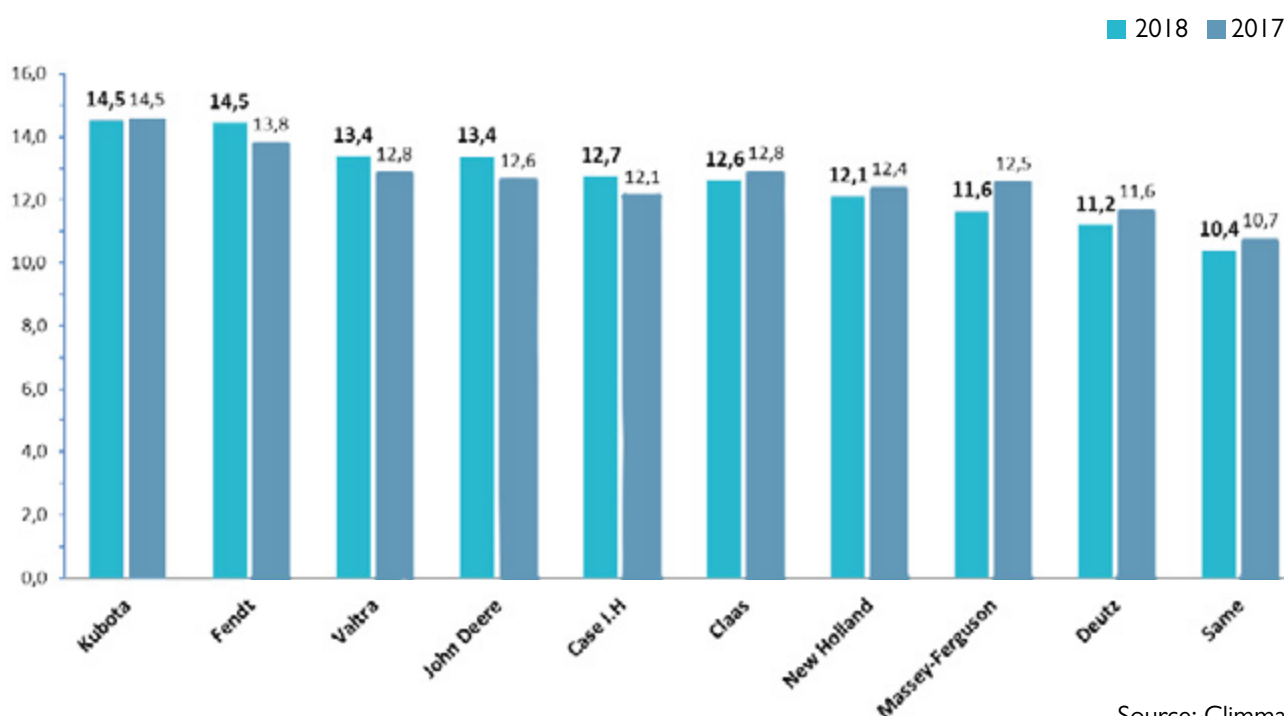
2018 results

Only those tractor suppliers/brands that are evaluated in at least four countries are listed. The overall brand average, the average of all factors combined, increased by 0.1 points to 12.7 points. (2017: 12.6 points, 2016: 12.6 points, 2015: 12.4 points). This means that dealers are slightly more satisfied with the performance of their suppliers. Only those tractor suppliers/brands that are evaluated in at least four countries are listed.

Compared to the 2017 averages, we can conclude that there's a positive development on:

- Financing offers: from 11.1 points in 2017 to 11.5 points in 2018
- Theft protection: from 8.3 points in 2017 to 8.9 points in 2018
- Profitability contribution: from 11.9 points in 2017 to 12.1 points in 2018

Brand average - all countries 2018



Source: Climmar

CLIMMAR is happy about this progress, but will also encourage tractor suppliers to improve their performance further as the average scores are still far from the maximum of 18 points.

All other performance indicators scored similar in 2018 and 2017, except for the appreciation of the willingness of tractor suppliers to improve their weak points. This indicator scored on average 11.6 points in 2018. A decrease of 0.2 points compared to 2017 (11.8 points). For CLIMMAR this is an important alert to stay in an active dialogue with tractor suppliers to strive for better dealer satisfaction in 2019.



Activity: Dealer Satisfaction Index

CLIMMAR representative: Anne Fradier (F)

Main targets: To improve the relationship between tractor dealers and tractor manufacturers for the benefit of the concerned distribution networks, brands and end users

Recruitment, Retention, Development and Promotion of the Job is Top of Mind!

Every member nation of CLIMMAR is focused on recruitment, education & training and retention of personnel for their member companies. The commitment of CLIMMAR on these subjects is strong and top of mind. They are of crucial importance for the future existence of our dealers and that is why CLIMMAR is involved in several activities and initiatives addressing these topics.

For many years now, CLIMMAR is involved in the area of skills competitions, particularly in the EuroSkills competition, organised by the WorldSkills Europe (WSE) organisation. EuroSkills competitions are held every two years. The most recent one was held in Budapest, Hungary, from 26-28 September 2018. In the competition of the trade “Heavy Vehicle Technology”, candidates from twelve countries competed for the title “Best Mechanic”. The whole event is a big promotion of the profession and the exposure to youngsters is massive. In Budapest, more than 70.000 youngsters visited the EuroSkills Competition. The next EuroSkills Competition will be held in 2020 in the city of Graz in Austria. CLIMMAR will continue to support these kinds of promotional initiatives.

Strengthening through partnerships

CLIMMAR is in close contact with the WSE to discuss further strengthening of the competition itself, but also to discuss a closer bonding on organisational levels between CLIMMAR and WSE, which could be formalised into a so-called Associated Partnership. This Associated Partnership should work beneficial for both organisations in the realisation of the main target: better promotion of the job.

Activity: Addressing the challenges of recruitment, retention, development and promotion of the job

CLIMMAR representative: Keith Christian (UK)

Main targets: to bring together a European perspective for the recruitment, retention and development of technicians in the land-based engineering sector as well as to highlight the many opportunities that exist within this industry and its many career paths both in dealerships and with manufacturers

CLIMMAR however, is doing much more than promoting the job. With a (draft) position paper we aim to identify and address the challenges for our sector concerning Recruitment, Retention and Development of mechanics and technicians. In this draft, we state that:

1. The industry needs to step up its general recruitment campaigns and provide a European wide template for the recruitment of new people to the industry.
2. The retention of qualified people needs to be addressed in terms of career development, salaries and opportunities. The land-based engineering sector is quite poor at promoting itself and the opportunities that are present.
3. Each country needs to be responsible for the development of individuals through structured training programmes such as apprenticeships, further education, higher education and manufacturer's training programmes. This is individual to each country within existing schemes mostly.
4. The dealer networks and trade associations need to engage more in what is being offered by manufacturers and encourage manufacturers to be involved in a more generic industry programme for the recruitment and retention of people.

Working on these challenges for the sector is a challenge in itself, but a crucial one for the future of our sector. Within CLIMMAR, working on these challenges is top of mind. Based on the internal discussions and the statements made in the draft position paper, a working group is established to work out an action plan and to formulate concrete goals.



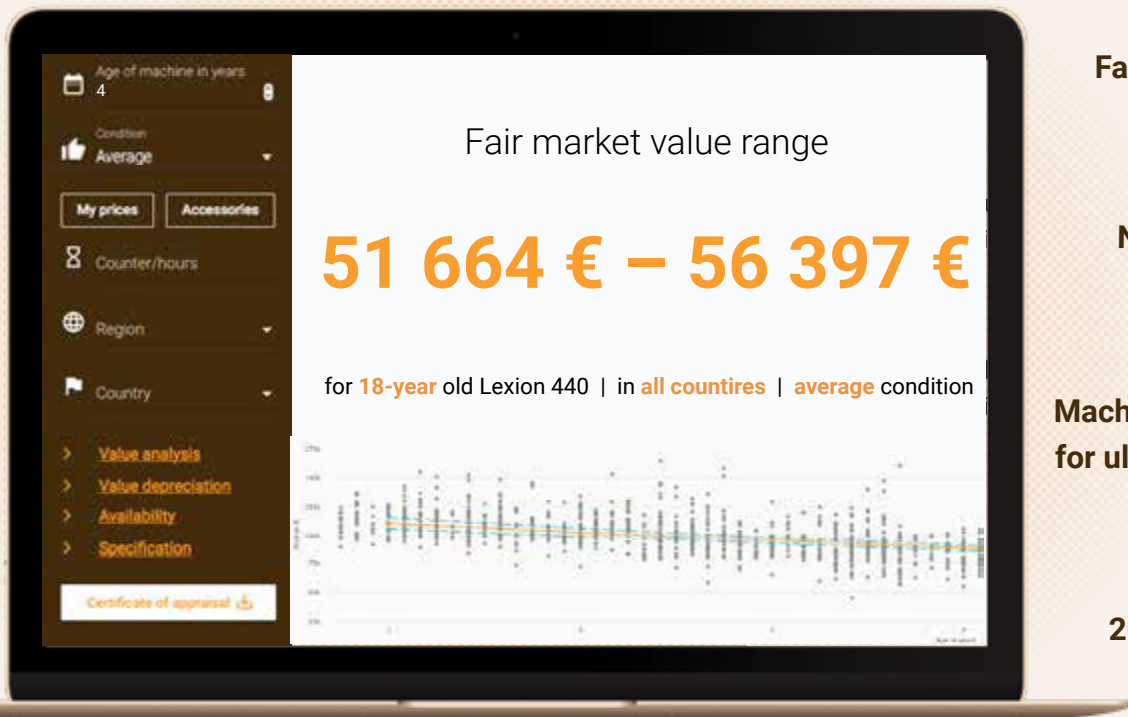
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Climmar Congresses: 66 Years of Exchanging and Strategy Planning

Since 1953, CLIMMAR Congresses have been the key to the association's successes and strategic milestones. The 66th edition is scheduled for 24 to 26 October 2019 in Thun, Switzerland.

At last year's congress:

- Position papers on smart farming and on collaboration were agreed upon
- The position paper on education and training was presented
- The CLIMMAR Index was launched
- A new project group dedicated to the garden machinery branch premiered

In chronological order the CLIMMAR congresses took place in:

1953

Paris, France



- 1954 The Hague, The Netherlands
- 1955 Vienna, Austria
- 1956 Zurich, Switzerland
- 1957 London, Great Britain
- 1958 Verona, Italy
- 1959 Bad Godesberg, Germany



1960

Copenhagen, Denmark

- 1961 Luxembourg, Grand Duchy
- 1962 Paris, France
- 1963 The Hague, The Netherlands
- 1964 Vienna, Austria
- 1965 London, Great Britain
- 1966 Berlin, Germany
- 1967 Rome, Italy
- 1968 Paris, France
- 1969 Amsterdam, The Netherlands



1970

no congress

- 1971 The Hague, The Netherlands
- 1972 Hertenstein-Weggis, Switzerland
- 1973 Rottach-Egern, Germany
- 1974 Vienna, Austria
- 1975 Edinburgh, Great Britain
- 1976 Brussels, Belgium
- 1977 Palermo, Italy
- 1978 Obernai, France
- 1979 Amsterdam, The Netherlands



1980

Dublin, Ireland

- 1981 Lisbon, Portugal
- 1982 Munich, Germany
- 1983 Appenzell, Switzerland
- 1984 Salzburg, Austria
- 1985 Dijon, France
- 1986 Maastricht, The Netherlands
- 1987 Porto, Portugal
- 1988 Athens, Greece
- 1989 Luxembourg, Grand Duchy

1990

Locarno, Switzerland

- 1991 Ostend, Belgium
- 1992 Cologne, Germany
- 1993 Vienna, Austria
- 1994 Troyes, France
- 1995 Copenhagen, Denmark
- 1996 Amsterdam, The Netherlands
- 1997 Swindon, Great Britain
- 1998 Stockholm, Sweden
- 1999 Luxembourg, Grand Duchy

2000

Venice, Italy

- 2001 Brno, Czech Republic
- 2002 Budapest, Hungary
- 2003 Lisbon, Portugal
- 2004 Dublin, Ireland
- 2005 Morat/Murten, Switzerland
- 2006 Berlin, Germany
- 2007 Brussels, Belgium
- 2008 Neudsiedl/See, Austria
- 2009 Avignon, France



2010

Krakow, Poland

- 2011 Edinburgh, Great Britain
- 2012 Kolding, Denmark
- 2013 Rotterdam, The Netherlands
- 2014 Riga, Latvia
- 2015 Stockholm, Sweden
- 2016 Venice, Italy
- 2017 Luxembourg city, Luxembourg
- 2018 Prague, Czech Republic



2019

Thun, Switzerland



Climmar reaches major milestones at its 65th Congress in Prague

4-6 October 2018

During the 65th CLIMMAR congress, its members reached important milestones including the agreement on several position papers and the launch of the CLIMMAR branch index.

From 4 to 6 October 2018, the 65th CLIMMAR Congress took place in Prague (Czech Republic). At the congress, organised by Czech member SDZT, several important decisions were taken unanimously. These decisions will help pave the path for the branch organisation in its mission to become a respected European lobby partner and an active contributor to the interest of European agriculture and garden machinery dealers and distributors.

New board member

The CLIMMAR Board was extended by a third Vice-President. Pierre Prim, from French member SEDIMA was elected to extend the CLIMMAR Board. The Board now consists of President Erik Hogervorst (NL), Joost Merckx (B), Ludger Gude (D) and Pierre Prim (F).

New projects

At the congress a new project group dedicated to the garden machinery branch premiered. This new working group will focus on creating branch reports that reflect the economic situation and trends for garden machinery dealer's business and market.

Another premiere, a world premiere even, was the launch of the CLIMMAR branch index. The index is derived from the half year branch reports surveys and shows the business cycle for European ag machinery dealers. The index might be new, but because CLIMMAR has a vast database with historical branch reports data, business cycle dates years back and trends can be determined.

Position papers

After a presentation by Pavel Milata, CEO of Leading Farmers CZ on 'Trends and developments in Precision Farming', unanimous conclusions were drawn on the final



position paper on smart farming. This includes amongst others that CLIMMAR aims to participate in the round table of the Code of Conduct on Agricultural Data Sharing and aims to become a signatory party to this Code of Conduct. Gerard Heerink (NL) was voted as the CLIMMAR representative.

The final position paper on collaboration with suppliers will be finalised later this year when all CLIMMAR members and their respective boards have given their agreement on the text of the paper. This position paper focusses on better conditions for dealers and distributors in distribution and service agreements.

A third position paper on education and training is in preparation and will be finalised at the next congress in October. The presentation of the proposal of the position paper was followed by group discussions on the most important issues to include in the paper.

The second day was closed by a presentation of Jérôme Bandry, Secretary General of the CEMA on 'Challenges of the industry within the Common Agricultural Policy' and a

presentation of Csaba Lejko, General Manager John Deere International on 'The future of Dealer Staff Qualifications, Training and Education'.

Farmers versus bureaucracy

The final day of the congress was opened by Mr. Jiří Šír, Deputy Minister, Ministry of Agriculture of the Czech Republic. He presented the structure and economic importance of agriculture in the Czech Republic and he also stressed the importance of maintaining the existing budget for the CAP-reform (Common Agricultural Policy). According to Šír, the CAP should also include smart farming as a tool to help make farming more sustainable. But he also said that 'Farmers are tired of bureaucracy and that it is time for action.'

The Deputy Minister was followed by presentations of Lina Tuvešson-Hallman (Maskin Leverantörerna, S) and Gerard Heerink (Fedecom, NL) on best practices in educational developments. Anton Verlaan, vocational education and learning consultant at Dutch OOM, 'If employees are our greatest asset, then why do we treat them as cattle'.

Climmar Spring Forum in Innsbruck (Austria)

6 & 7 March 2018

On an annual base CLIMMAR organises in the spring time a Forum for its member countries. These Spring Forums are meant for update and preparation of the ongoing work and activities. During the annual CLIMMAR Spring Forum in Innsbruck (Austria) on 6 and 7 March 2018, 10 out of 16 members were present. Topics on the agenda included the progress on RMI, the branch reports and DSI investigation, the 65th congress in Prague, and, most important, the future agenda, position papers and strategy of CLIMMAR. The spring forum was organised by Austrian member association ARGE.



Climmar Spring Forum in Naples (Italy)

21 & 22 March 2019



12 member countries were present in Naples, Italy, for the annual CLIMMAR Spring Forum. They discussed the ongoing work of CLIMMAR on the several activities like the progress on the Lobby files (RMI), the Branch Reports and the DSI. Another main topic on the agenda was the internal discussion on the organisational future of CLIMMAR. In the last couple of years CLIMMAR's involvement and visibility into several activities such as lobby and public relations has expanded. This sets new requirements to the organisational level of CLIMMAR. A special working group is busy with the preparation of an internal paper on the Future of CLIMMAR which will be discussed and de-

termined during the 2019 Congress in Thun, Switzerland.

Last but not least, several presentations on Best Practices were presented by the different members countries. These best practices include A Pact for a Fair and Sustainable Agriculture, the creation of Satisfaction Awards for manufactures, and several Best Practises were on the item of Education and Training. Main goal of the Best Practises is to learn from and inspire each other. The presentations were highly appreciated.

The Spring Forum in Naples was organised by the Italian member association UNACMA

Climmar President Key Note at EIMA 'Data & Agriculture' Conference



EIMA 2018 featured a conference organised by Image Line focussing on big data and the benefits of new digital solutions. CLIMMAR President Erik Hogervorst closed the conference with his presentation on 'Mechanics and digital agriculture: why they have to be connected?'

100 years of Dansk Maskinhandlerforening

In November 1918, the Association of Danish Agricultural Machinery Dealers was founded, and this 100-year anniversary has of course been celebrated this year. Yding Smedie og Maskiner was named the best apprenticeship place in 2018 for their efforts to take in apprentices.



Secretary-General Jelle Bartlema represents Climmar at LTU-Tage

Secretary-General Jelle Bartlema, gave two presentations about CLIMMAR activities at the Landtechnische Unternehmertage (LTU) in Würzburg, Germany on the 10 and 11 of January 2019. One presentation was specially dedicated to the Cooperation Partners from CLIMMAR member Land-BauTechnik. They wanted to know more about the CLIMMAR and her activities. The second one was during the plenary meeting of the LTU Tage in front of a big audience of dealers, manufacturers and suppliers, Jelle Bartlema gave an update on the current activities of CLIMMAR.



100 years of SEDIMA

CLIMMAR President Erik Hogervorst gave a presentation on the occasion of the centennial anniversary conference of French CLIMMAR member SEDIMA, on 1 February 2019 in Avignon, France. Showing the SEDIMA members that CLIMMAR is very much active and alive in defending the dealer interests on a European level.



Climmar Communications: Connecting, Informing and Sharing

Communication is a crucial part of **CLIMMAR's** activities over the past 66 years of existence of the organisation. We communicate with member nations and their dealer members, with partners and stakeholders, to bring them up to date on topics and challenges related to our sector.

CLIMMAR's and its members' communication portfolio has grown rapidly and nowadays comprises:



Annual magazine

Annual congress

Bimonthly newsletters



Press releases

Position papers

Press conferences



Members' communication

Members' shows, events and exhibitions

www.climmar.com





Exchanging and Sharing is the Secret of Climmar since 1953





**Climmar and its 16 Members
Welcome You to Our Activities!**

