



CLIMMAR REPORT OF ACTIVITIES 2020



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de Machines Agricoles et Réparateurs

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Looking Forward Together

The year 2020 was a year we will never forget! The impact on the business was not so big overall, but the impact on our lives has been immense. If somebody had predicted the world would be in lockdown for more than one year, we would not have believed him or her! Today, most of our lives are affected by the pandemic in one way or another. There is a huge number of stories to tell, but for this occasion I want to focus on the business side of the situation.

We have seen our way of life and work change overnight and while we first thought it would be for a short period of time, we now realise it will be there for the long run. However, the restrictions also made changes possible that otherwise would have taken years. In the 90's, our way of working changed in a decade because of the mobile telephone and the Internet. And now, teleconferencing has managed to change our way of working in less than a year!

We now realise more than ever, why it is important to meet people face to face. For years, we have been looking at the number of exhibitions and wondered 'why so many...' Today we see that our customers have no problem in keeping up with new developments in the market. Sales continue and all information can be found online. But we found that the most important part of exhibitions is communication. Knowing what is going on in the business and what the ideas of customers, dealers, advisors and manufacturers are.

What does this mean for the future? We have seen new initiatives like online exhibitions where we have to evaluate what the potential is. We recently saw one major exhibition being postponed for almost four months while another is still scheduled for the third quarter of this year in the expectation that this will be possible. And even if customers will want to come. Big manufacturers hesitate on what to do. Some cancel participation here in Europe but join exhibitions in other parts of the world.

We have to learn to live with the consequences of viruses being spread around the globe very easily. My expectation is that we will not get back to the situation of pre-COVID-19. We have to develop platforms where the industry can communicate, learn and work. Where in an increasing individualistic world, we can fill the need to come together, digital and/or physical.

We have been talking about telematics on machines for many years, we deliver machines that take over decisions in the field, the next big thing is autonomous machines. These are the developments we project to our customers now. We have to start looking in the mirror and project what this means for our organisations and our members. Not by looking back and trying to hold on, but by looking forward and by creating new opportunities.

And that is exactly what CLIMMAR has been and always will be about! We will continue to develop strategies, position papers, surveys and lobby activities as a professional (lobby) organisation to represent European agricultural and garden machinery dealers. Because it is not the strongest, nor the most intelligent of the species who survive, it is those who are most adaptable to change (by Charles Darwin).

Please have a look on what CLIMMAR is doing and maybe what we can cooperate and work on it together... Let's look forward together!

Yours sincerely,

Erik Hogervorst
President of CLIMMAR



Climmar Presidency



PRESIDENT
Erik Hogervorst (NL)



SECRETARY-GENERAL
Jelle Bartlema (NL)



VICE-PRESIDENT
Roberto Rinaldin (I)



VICE-PRESIDENT
Ludger Gude (D)



VICE-PRESIDENT
Pierre Prim (F)

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.



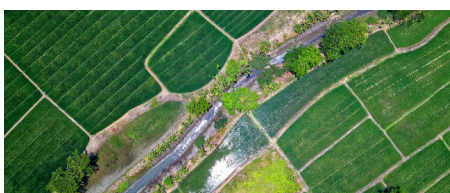
19,191 Dealers

16 CLIMMAR members represent a total of 19,191 dealers and distributors across Europe.



158,799 Dealer Employees

19,191 dealers and distributors represent a total of 158,799 dealer employees.



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

19,191 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

m.christiaens@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 (FEDERACMA)



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

+39 068 74 20 010

E-MAIL

segreteriaassociati@federacma.it

WEBSITE

www.federacma.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

g.muller@fda.lu

WEBSITE

www.femal.lu



Netherlands (Fedecom)



Total number of dealers	706
Total number of dealer employees	5,789
Number of farmers	67,000
Average farm surface area (ha)	27

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@pigmiur.pl

WEBSITE

www.pigmiur.pl



Slovakia (AGRION)



Total number of dealers	55
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@maskinleverantorema.se

WEBSITE

www.maskinleverantorema.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, UK

PHONE

+44 1295 713344

E-MAIL

info@bagma.com

WEBSITE

www.bagma.com



Covid Survey

COVID-19 Impact on Dealers

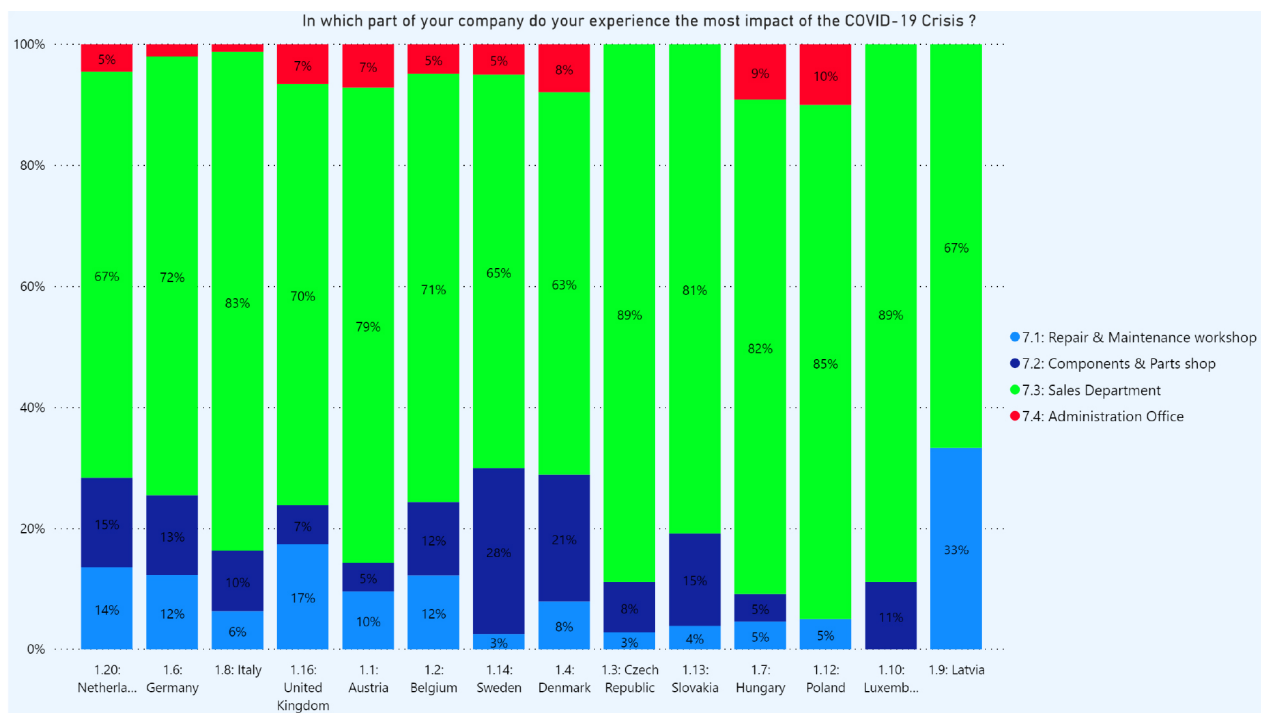
Early 2020, the COVID-19 crisis broke out which first had a huge impact on the way day-to-day business was done. Physical contact changed almost overnight into digital contact. For CLIMMAR, this was a reason to survey the real impact of the COVID-19 situation on European dealers among its members. The results of this survey showed that 80% of the participants was affected in the first half year of 2020. Especially sales of new machinery were affected.

In total, not less than 660 dealerships from 14 different countries responded to the survey. This gives a good indication of the effects and impact of the COVID-19 crisis on their businesses. The survey showed that the effects of the COVID-19 crisis were strongly felt by dealer companies and distributors in the European agricultural machinery and equipment sector.

Around 80% of the respondents experienced 'limited' to 'a lot' consequences. The main 'pain' was felt in the sales department of dealer companies with sales of new machines stagnating in particular. The sale of used machinery has also been affected significantly, but less than the sales of new machines.

Workshop activities up beat

The effects of the COVID-19 crisis on the turnover of repair and maintenance workshops were less significant. Dealer companies generally still had enough work to do there. This is partly due to the fact that customers, especially in the agricultural sector, had to do their spring activities like soil preparation, fertilising and seeding and that machines were fully used for this. Repair and service work on these machines has therefore been carried out consistently and ensured that work in the dealers' workshops generally remained at an acceptable level.

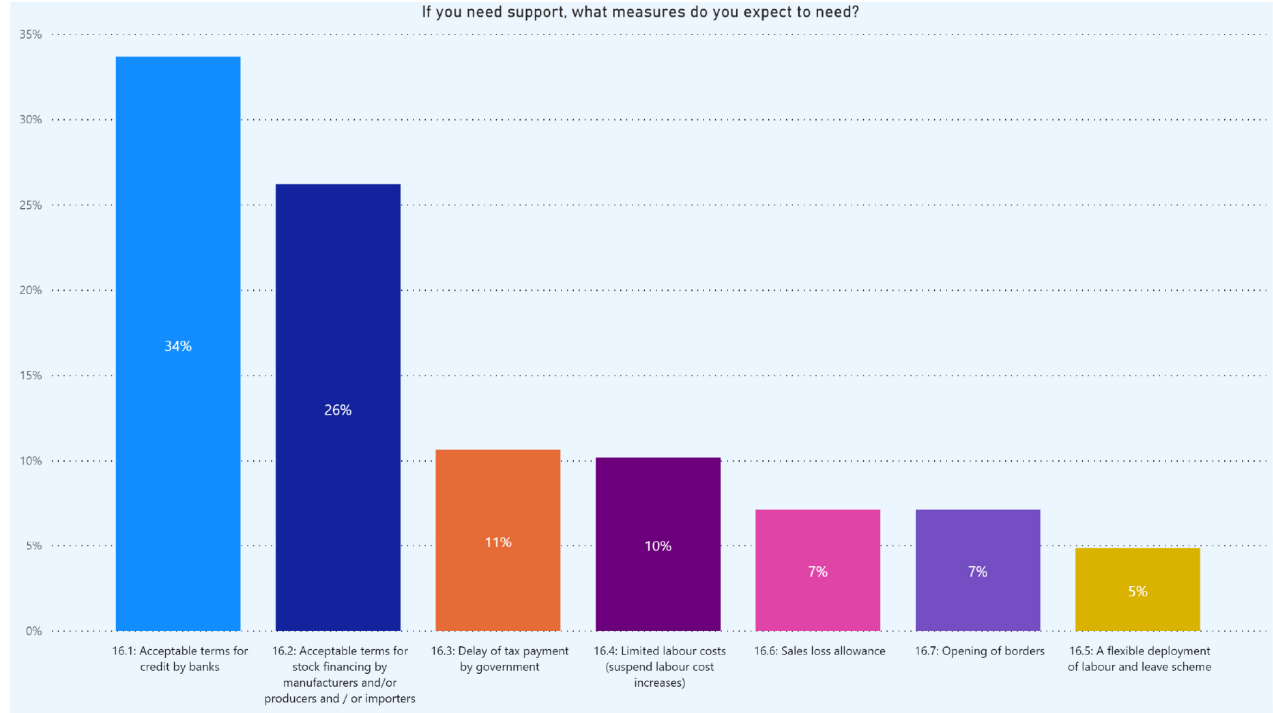
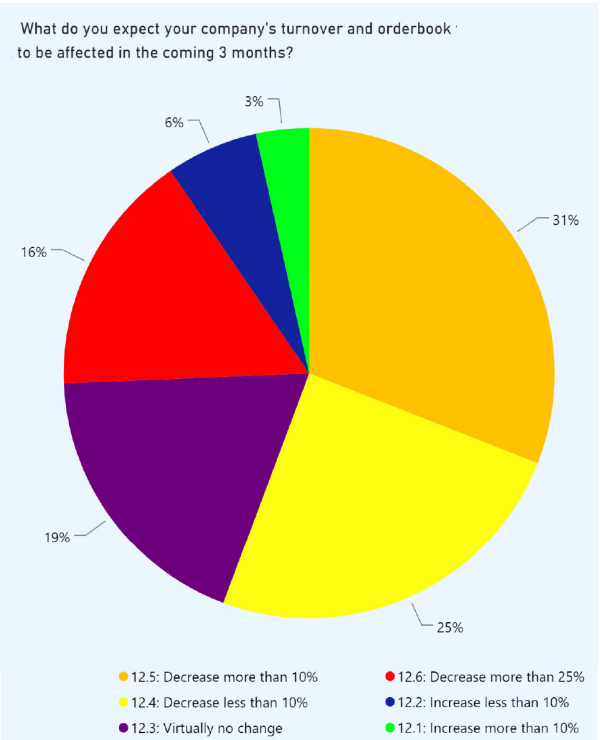


In general, about 45% of the dealerships taking part in the survey indicated that they needed (financial) support to survive the crisis. On the other hand, 13% of companies clearly indicated that they didn't need support measures and could do without it. The follow-up question of what kind of support measures are needed, clearly showed that companies mainly need acceptable credit conditions from banks, but also favourable conditions from manufacturers and machine suppliers for financing stocks.

70% expected decreased sales

At the time of the survey, the outlook for the next three months of 2020 was pessimistic with regard to order book development and turnover. More than 70% of the 660 dealerships taking part in the CLIMMAR survey indicated that they expected a significant decrease, of which 16% even expect a decrease of more than 25%.

A full copy of the survey can be downloaded [here](#).



Lobby Activities

Active Lobbying for Concrete Results

CLIMMAR is actively involved in European 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. 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.

RMI - vehicle on-board diagnostics

Two new ISO standards were finally adopted mid-December last year. Both now form the protocol for manufacturers to make their Repair and Maintenance Information (RMI) available. The RMI protocol is to ensure non-discriminatory access to the required information in order to guarantee fair competition between brand dealers and independent mechanics.

In fact, according to the European Tractor Mother Regulation 167/2013, machine manufacturers have been obliged to share information since 2016 if an unauthorised technician requests it. To this end, various RMI portals have already been put online but there was still no protocol for how a manufacturer can actually make that information available until now. ISO 22172-1 summarises the requirements for the operation and user-friendliness of an RMI web portal and ISO 22172-2 contains all the details about plug connections for on-board diagnostics.

Per 1 July 2021

At the last WGAT (Working Group on Agricultural Tractors) meeting, the document regarding the time line for vehicle manufacturers to provide the connection to the vehicle according to ISO 22172-2 was accepted as well as the due date of 1 July 2021. This date was found in an agreement between CEMA and CLIMMAR, and then later ratified by the Commission after the two organisations sent a joint position paper to the Commission/DG Grow, stating when this seemed possible to take into action for the producers. The members of ISO/TC23 "Tractors and machinery for agriculture and forestry" have had their voting and accepted the final draft.

New vehicle models (or facelift) introduced after 1 July 2021 must have at least one diagnostic plug that complies with SAE J1939-13 (type 1 or 2), an Isobus diagnostic plug or a correct OBD II power plug. For that vehicle model, the RMI portal must also work according to the ISO standard. CLIMMAR is very curious about the experiences with the standard once the vehicles first come to dealer's workshops for repair and/or maintenance later this year.

Working Group Agricultural Tractors

The Working Group Agricultural Tractors (WGAT) virtually gathered on 24 September 2020 for the first ever online meeting. It was the 113rd meeting of the WGAT. On the agenda was amongst others an update on amendments to emissions' legislation due to COVID-19 circumstances.

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



This specific topic has also become a joint agreement between CEMA, CETTAR and CLIMMAR who have asked the European Commission to postpone the deadlines of the Stage V transition for the production and placing on the market of NRMM and tractors fitted with transition engines of the power classification <56 kW and ≥ 130 kW by 12 months from 31 December 2020. The EU originally stated deadlines on the use of these engines for the production of machines till June 2021 and for entry into service of the machines with these engines till December 2021. Due to the COVID-19 pandemic, production lines and logistics are badly disrupted which makes the plea of CEMA, CLIMMAR and CEETTAR for an extension of the original deadlines by 12 months.

Data on vehicle type plates

Another subject where CLIMMAR has issued a position paper in agreement with CEETTAR and COPA-COGECA is regarding the data on vehicle type plates issued by manufacturers. These data are mainly given in regards to EU 167/2013 type approvals but most vehicles are intended and constructed to perform much more activities when working in the field. There is a risk for users that police and other authorities only can see these type approval data as the manufacturers data limitation. This could for instance mean that many trailers and slurry tankers will not be able to legally use their full capacity, both on the roads as in the fields because of the type approval data are smaller than what the vehicle must be constructed to perform with the load area/tank capacity.

Another issue concerns the need to have wider tyres and or double mounted tyres to achieve lower ground pressures in order to avoid soil compaction. This can also become a problem because the EU type approval only allows up to 3 m width in total. COPA-COGECA, CEETTAR and CLIMMAR made a position paper asking the commission to get permission to add a second set of data from the manufacturers. A data set to include for instance draw, pull and axle loads and a maximum tyre width when used in the field and/or if the member state allows this on their roads. The project was presented at the 24 September meeting by the COPA-COGECA representative explaining why it is absolutely essential for farmers to be able to use wider tyres. Also, to be able to do their field work at the correct time of year regardless of wet soil conditions.

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?

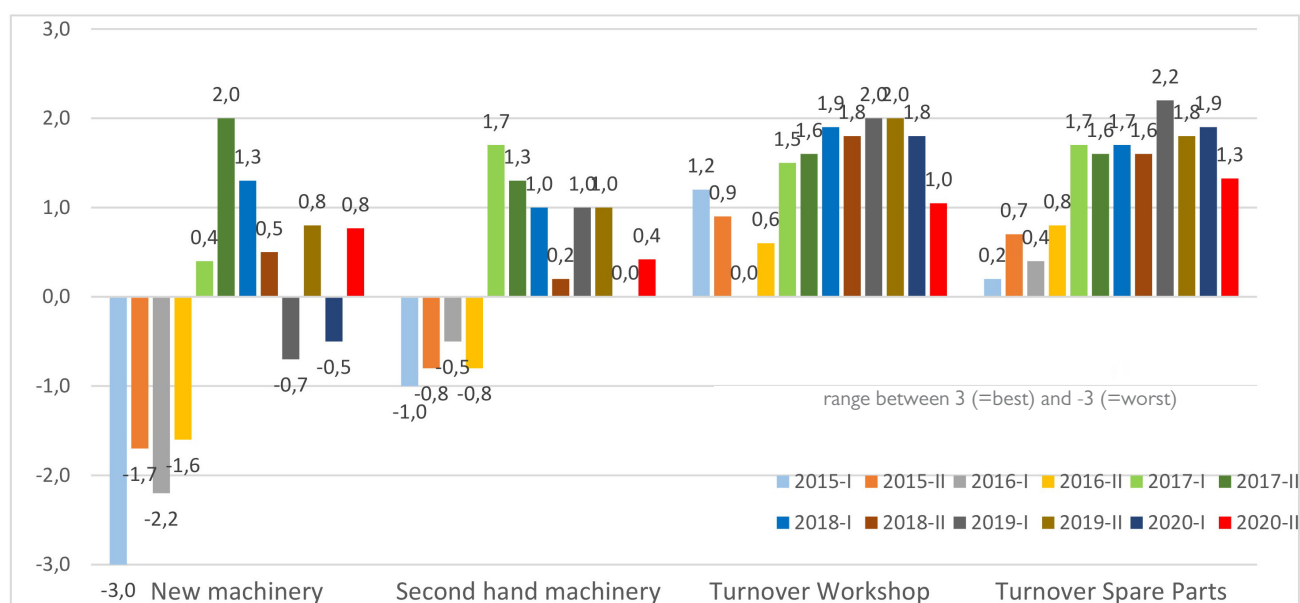
Business review

After a slight decrease of -0.5 for new machinery turnover and stable sales of second hand machinery in the first half year of 2020, European dealers and distributors saw an increase of 0.8 respectively 0.4 in the second half of 2021. Workshop and spare parts turnover went up with 1.0 and 1.3 respectively. All indices are numbers compared to the same period of the previous year. The review of turnover development is summarised on the map of Europe using different colours.

Business outlook

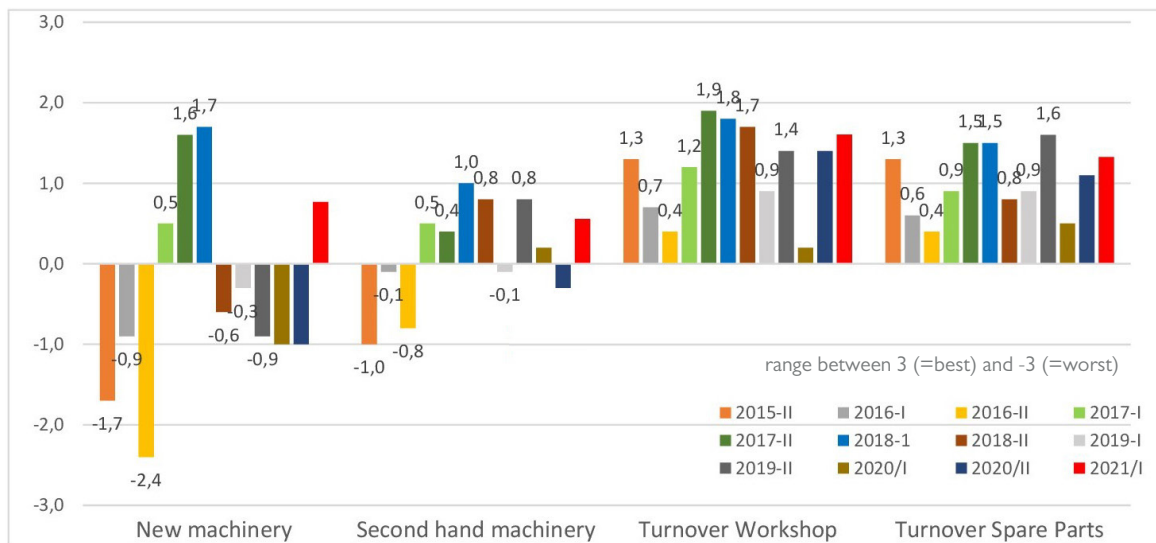
The business outlook - the expectation indices - describe the expectations European dealers and distributors had concerning their business for the first half year of 2021 compared to the second half year of 2020. For the first time since 2018, they were positive about the expected turnover development of new machinery (+0.8) and they were also positive about the outlook of second hand machinery (+0.5). The sentiment remains to be positive for expected workshop turnover (+1.6) and for expected spare parts sales (+1.3). The review of expected turnover development is summarised on the map of Europe using different colours.

Trend-Indices for: Turnover



Source: Climmar

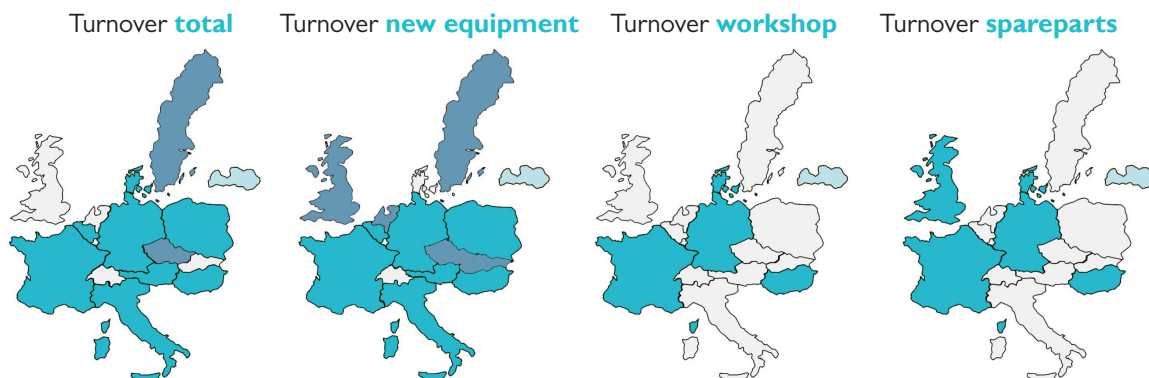
Expectation-Indices for: **Turnover**



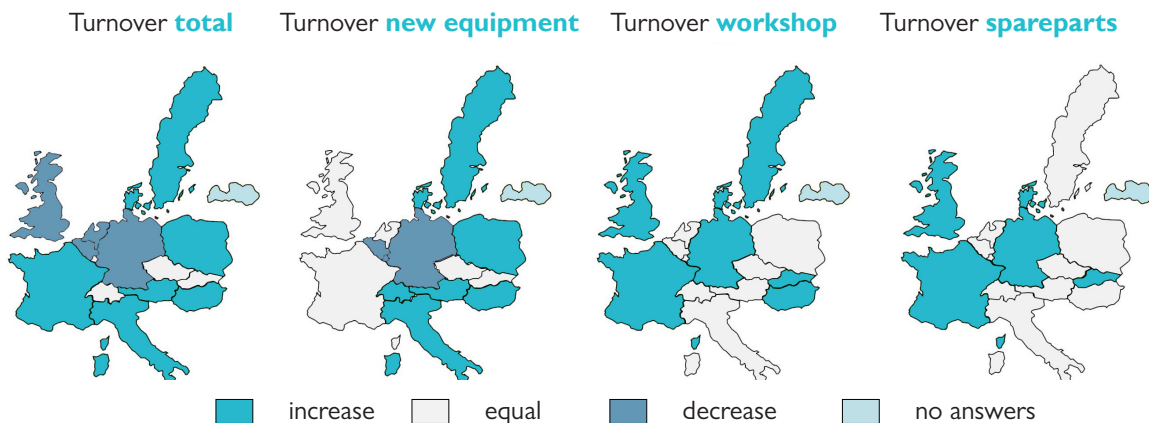
Source: Climmar

Turnover Trends and Expectations

I. **Development of turnover** in the second half of 2020, compared with the same period 2019

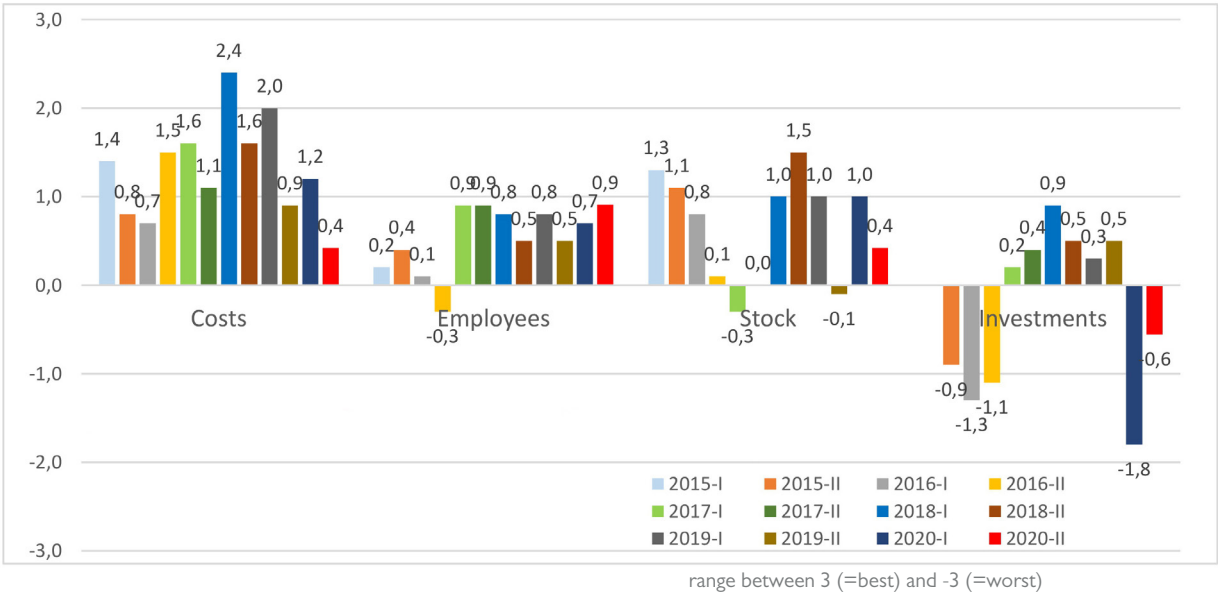


II. **Expectations of turnover** for the first half of 2021

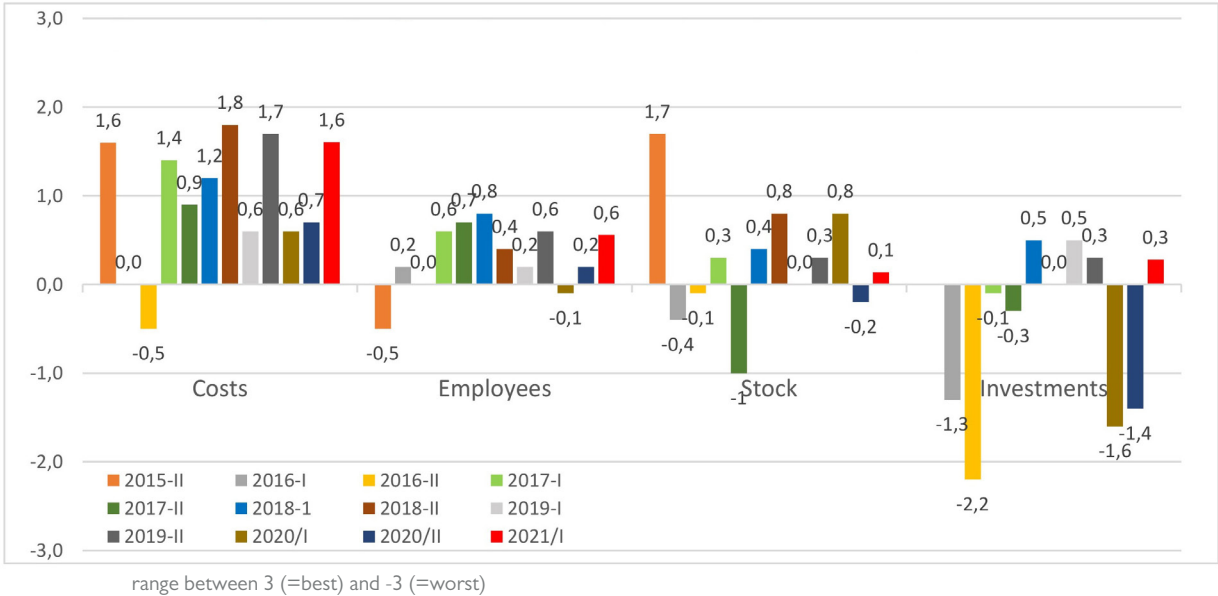


Source: Climmar

Trend-Indices for: **Other developments**



Expectations-Indices for: **Other developments**



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.

The CLIMMAR Index describes the situation of the industry throughout Europe with just one value. Published for the first time in 2018, the index uses a scale of -3 to +3 to describe branch trends every six months and to forecast the current situation in the (only theoretically existing) average European dealer company. The indices for previous years were derived from the Branch reports.

It is fed from values of current and expected sales, costs and investment development, weighted per country, the half yearly CLIMMAR branch reports surveys. The CLIMMAR Index is the first and only parameter that describes the situation in the agricultural equipment dealers' sector in relation to trade and service, exclusively for Europe.

Increasing optimism

In the first half year of 2020, the CLIMMAR Index stood unexpectedly positive at +0.26 as expectations in view of the COVID-19 pandemic looked significantly worse. At the time, the estimation for the second half year of 2020 was +0.21, but in retrospect the index ended up significantly higher at +0.73. Currently, the estimated index for the first half year of 2021 even is at +1.02 (violet line) which is the highest since 2017.

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. The DSI survey has no commercial purposes and the questions and answers only reflect the relationships between manufacturers and distributors, not with end users. The United Kingdom and Austria were not able to participate this year due to their COVID-19 situation and restrictions.

In 2020, the 10th (!) edition of the DSI survey took place. The survey usually is done in April, but due to COVID-19 and the related lockdown, the calendar changed and CLIMMAR decided to carry out the survey in June.

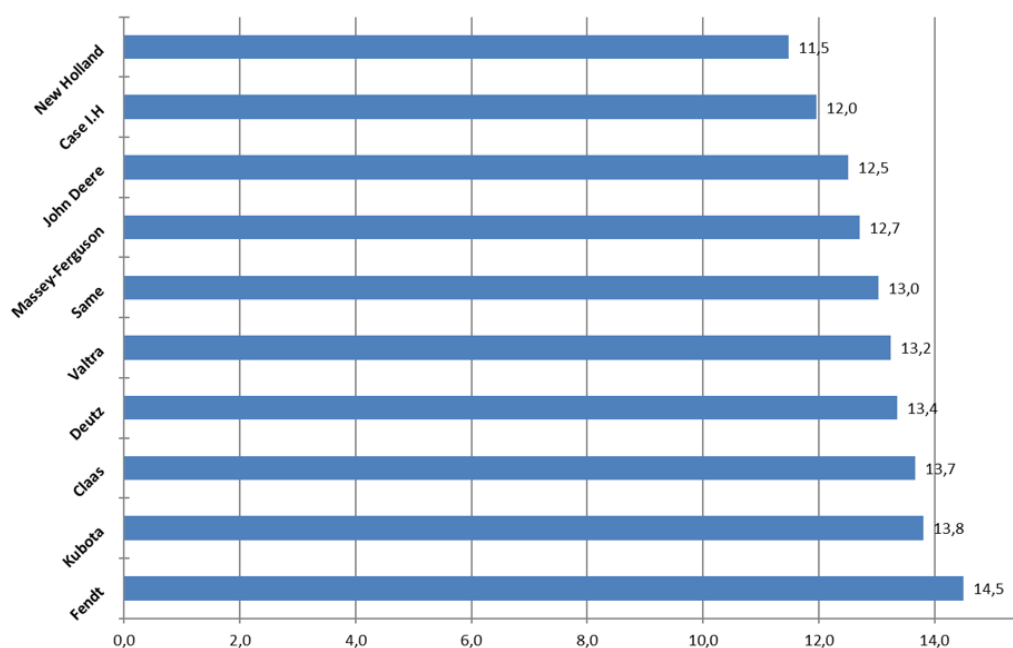
The following eight countries took part: Belgium, Denmark, France, Germany, Hungary, Italy, Netherlands and Poland.

They all use the same questionnaire for their participating dealers. The overall European results were presented exclusively to the CLIMMAR members at the annual - yet on this occasion digital - CLIMMAR Congress in October and to the public during a press conference that took place at the EIMA digital preview in November 2020.

2020 results

The overall brand average, the average of all factors combined, decreased by 0.1 points to 13.0 points (2019: 13.1 points, 2018: 12.7, 2017: 12.6). This means that European dealers - on average - are slightly less satisfied with the performance of their tractor suppliers. Only those tractor suppliers/brands that are valued in at least four countries are listed.

Overall average for each brand



Global
average
13

Source: Climmar

Most significant changes

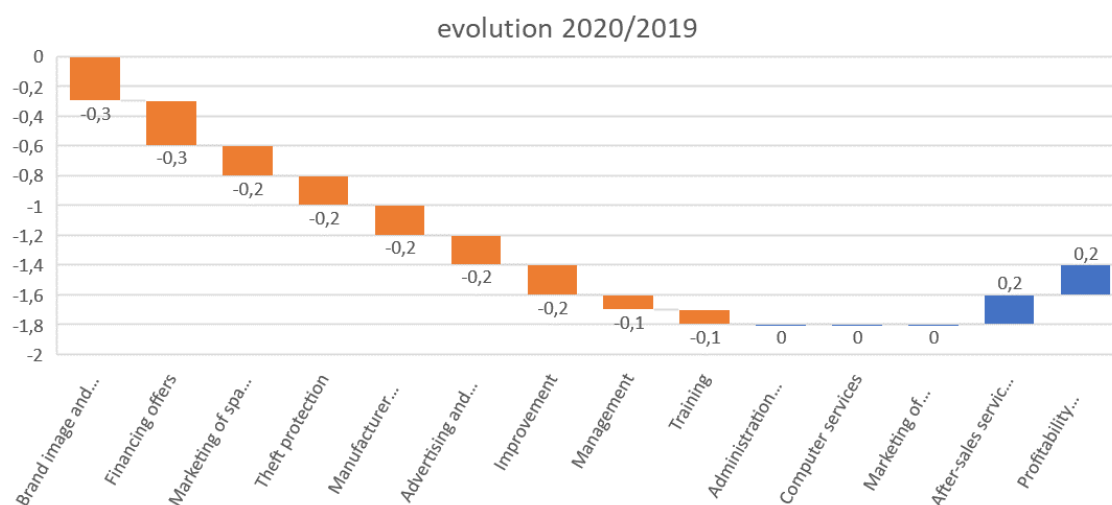
Compared to last year's averages, 9 out of 14 aspects show a downward and negative development. 3 aspects are equal and only 2 out of 14 aspects show a positive development. As much as CLIMMAR appreciates the reasonable satisfaction level of the overall brand average with 13,0 points, the many aspects in last year's DSI going downwards clearly shows that dealers are dissatisfied with their brand and that urgent attention from manufacturers to improve is required.

We might expect that the drop in 2020 on most of the aspects of the DSI could be explained by the reorganisations of dealer networks by several brands. If manufacturers listen better to their dealers, they might improve their rating by those same dealers. CLIMMAR calls upon the manufacturers to improve their performances on this.

Theft protection needs urgent attention

A particular aspect worth mentioning is theft protection. This aspect dropped with -0.2 points to an average satisfaction level of only 9,7! This level is the lowest of all investigated aspects and needs urgent attention from the manufacturers.

With tractors becoming more high-tech with all kinds of expensive (computer) equipment on board, it is essential to take effective and better protection measures on the machines. In many European countries, theft rates in agriculture are raising significantly, mostly due to the 'easy way' of theft caused by the low level of protection measures on the machines. CLIMMAR urges manufacturers to take this aspect more serious and to improve their performances on it.



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

Climmar Events

Climmar Vice President Ludger Gude Addresses LTU Audience

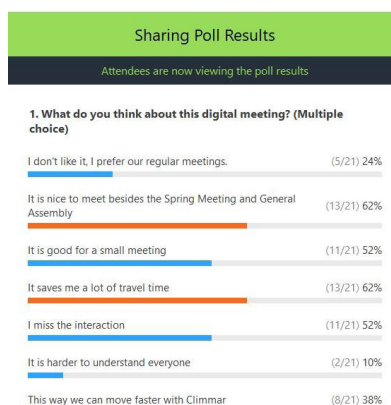
9 & 10 January 2020



On 9 and 10 January 2020, the 9th edition of the 'LTU Tage' (Agricultural Entrepreneur Congress) took place in Würzburg, Germany. The annual event is organised by AGRARTECHNIK Magazine and is supported by our German member association LandBauTechnik Bundesverband.

CLIMMAR Vice President Ludger Gude explained the added value of CLIMMAR as a European branch organisation to represent the interests of dealers and independent repairers and service operators to the audience.

Climmar Spring Forum and Congress by Video

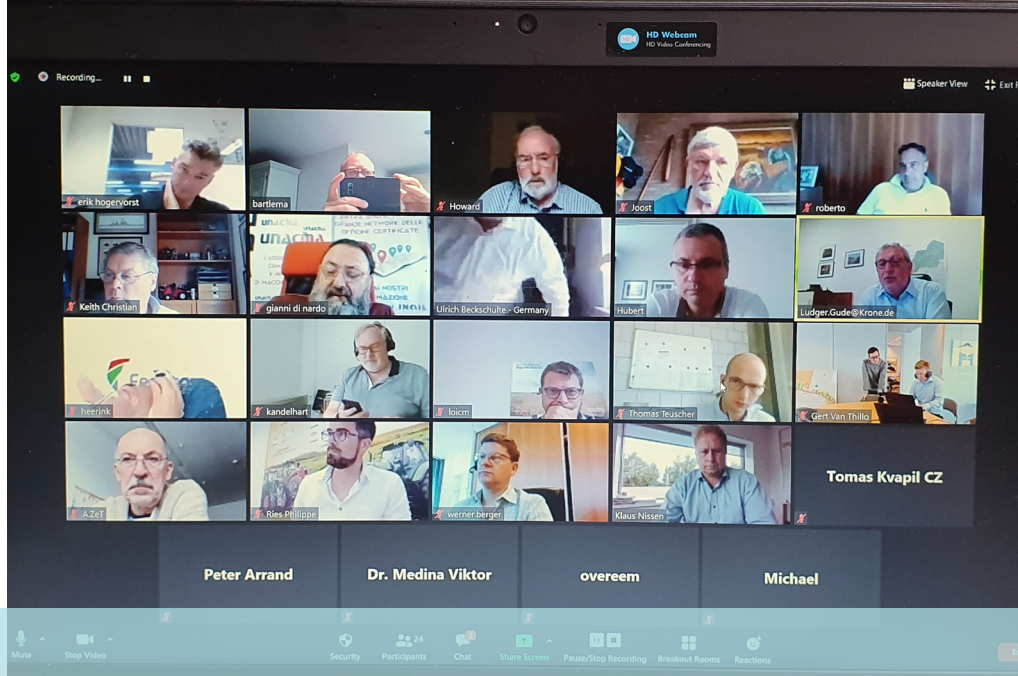


On an annual basis, CLIMMAR organises a Forum for its member countries in the spring time and an annual Congress in October. The Spring Fora are meant for updating each other and for the preparation of the ongoing work and activities. The Congresses are also acting as the General Assembly of the CLIMMAR members and official decision making on activities and policies of CLIMMAR is done during the Congress.

The Spring Forum 2020 was originally planned to take place in Gdansk, Poland at the end of April.

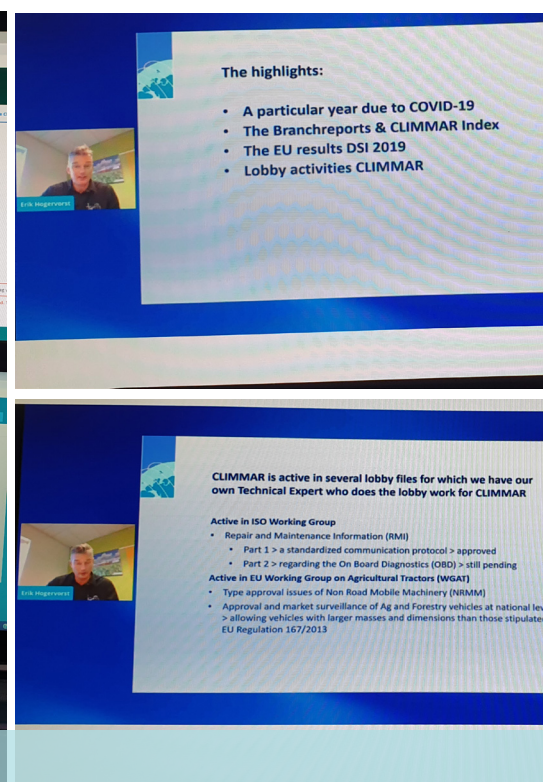
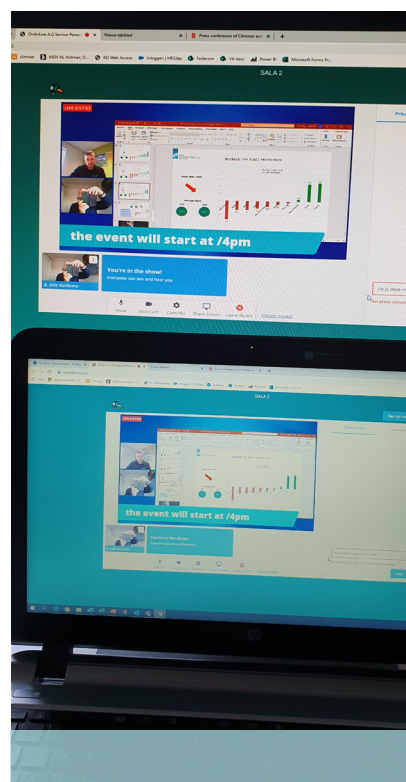
Due to the COVID-19 situation, it had to be cancelled and instead, the Spring Forum took place online on 9 July. Also the annual Congress, which was planned at the beginning of October in Budapest, Hungary, had to be cancelled and now took place as an online General Assembly on 9 October 2020.

The fact that both the Spring Forum and the Congress had to be organised by video, put everything in a different but also interesting perspective. So much can be concluded from the results of the poll that was held at the end of the meeting.



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

CLIMMAR President Erik Hogervorst presented the highlights of the CLIMMAR 2020 activities at the EIMA digital preview in November 2020. In this online press conference, attended by a good number of international journalists, Hogervorst stipulated the COVID-19 situation all the countries are facing and the results of the COVID-19 impact survey CLIMMAR ran in the springtime of 2020. Furthermore, the European results of the DSI 2020, the statistics of the Branch reports and the CLIMMAR index were mentioned as well as the achievements of CLIMMAR in lobby activities.



Climmar Communications: Connecting, Informing and Sharing

Communication is a crucial part of **CLIMMAR's** activities over the past 68 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 report of activities

Annual congress

Bimonthly newsletters



Press releases

Position papers

Press conferences



Members' communication

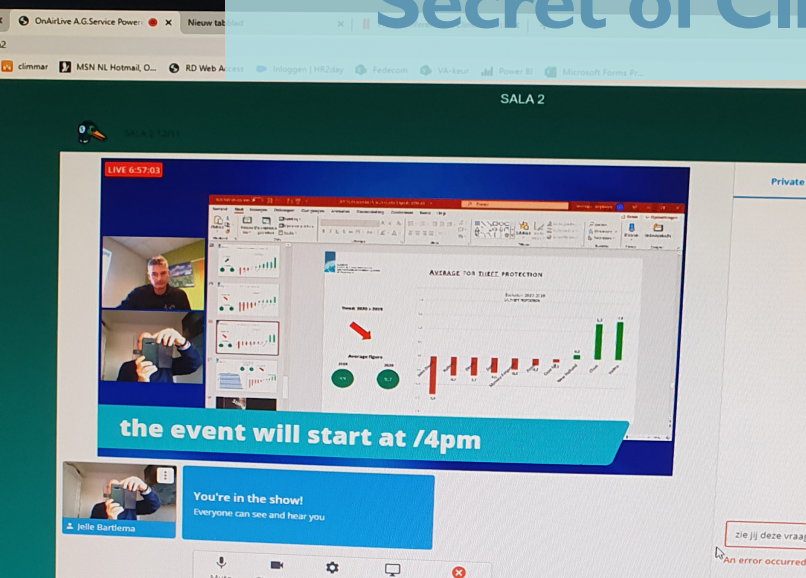
Members' shows, events and exhibitions

www.climmar.com





Exchanging and Sharing is the Secret of Climmar since 1953



Climmar and its 16 Members Welcome You to Our Activities!

