

***EUROPEAN DEALERS
APPRECIATE
THEIR TRACTOR OPERATORS***

enquiry 2011

THE SAME INQUIRY IN CLIMMAR

2010 = 5 countries

2011 = 7 countries

SAME INQUIRY FORM

53 questions

SYNDICAT NATIONAL DES ENTREPRISES DE SERVICE
ET DISTRIBUTION DU MACHINISME AGRICOLE

ENQUETE 2011

COMMENT JUGEZ-VOUS
VOTRE CONSTRUCTEUR-TRACTORISTE ?

Retournez l'original par courrier : les photocopies et fax ne seront pas traités.

*Si vous êtes concessionnaire de 2 tracteuristes ou plus,
ou si vous souhaitez que vos filiales répondent également,
demandez-nous des questionnaires supplémentaires.*

- | | | |
|--|-------------------------------------|--------------------------------------|
| <input type="checkbox"/> Case I.H | <input type="checkbox"/> Claas | <input type="checkbox"/> Deutz |
| <input type="checkbox"/> Fendt | <input type="checkbox"/> John Deere | <input type="checkbox"/> Kubota |
| <input type="checkbox"/> Massey-Ferguson | <input type="checkbox"/> Mc Cormick | <input type="checkbox"/> New Holland |
| <input type="checkbox"/> Same | <input type="checkbox"/> Valtra | |

> **PRODUCTION DOMINANTE SUR VOTRE SECTEUR :**

- | | |
|--|--|
| <input type="checkbox"/> Céréales — Grandes cultures | <input type="checkbox"/> Polyculture — Élevage |
| <input type="checkbox"/> Viticulture — Arboriculture | <input type="checkbox"/> Autre |

*Pour chaque question, cochez la case (une seule) correspondant à
votre degré personnel de satisfaction.*



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7

~~8~~ COUNTRIES



DENMARK



GERMANY



FRANCE



ITALY



NEDERLAND



POLAND



~~UNITED KINGDOM~~



SWITZERLAND

1087 ANSWERS



DENMARK



GERMANY



FRANCE



ITALY



NEDERLAND



POLAND



UNITED KINGDOM



SWITZERLAND

1087 ANSWERS

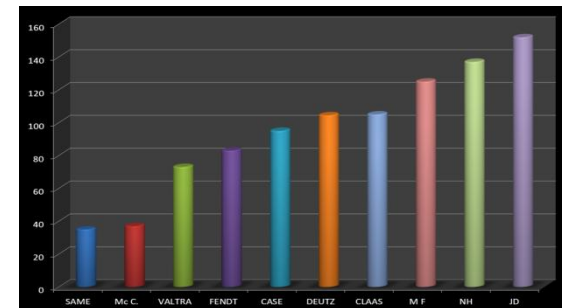
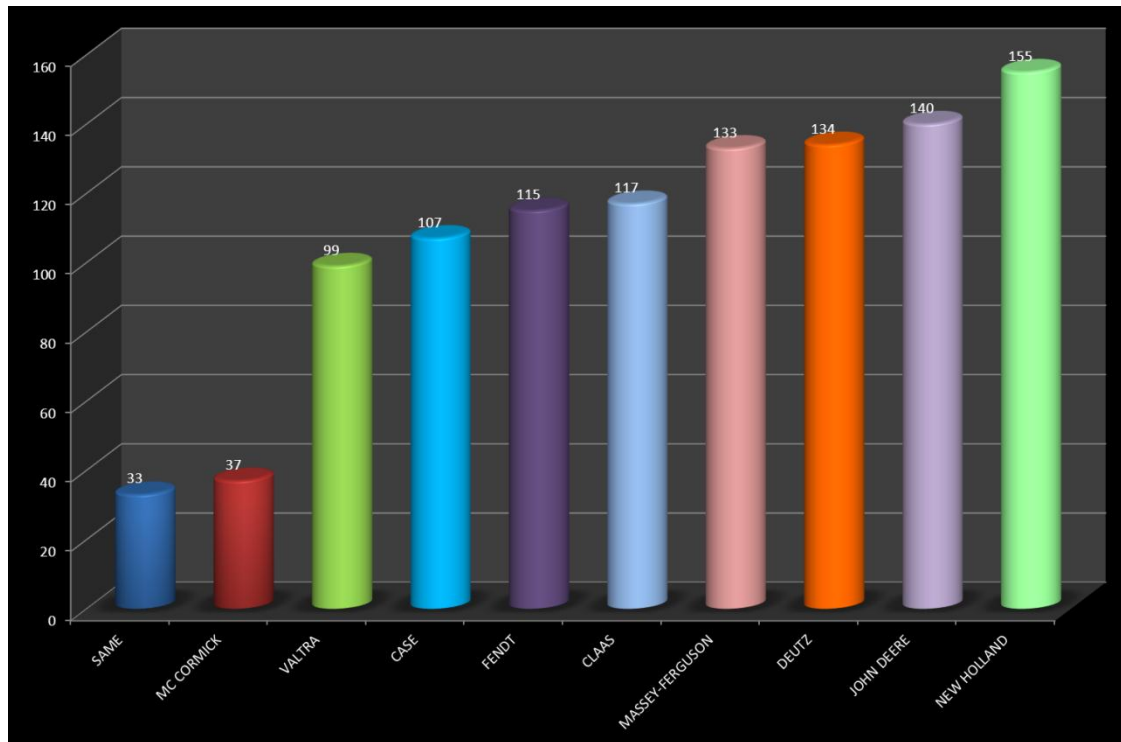
	DENMARK	● 96
	GERMANY	● 313
	FRANCE	● 288
	ITALY	● 58
	NEDERLAND	● 163
	POLAND	● 38
	UNITED KINGDOM	● 0
	SWITZERLAND	● 131

1087 ANSWERS

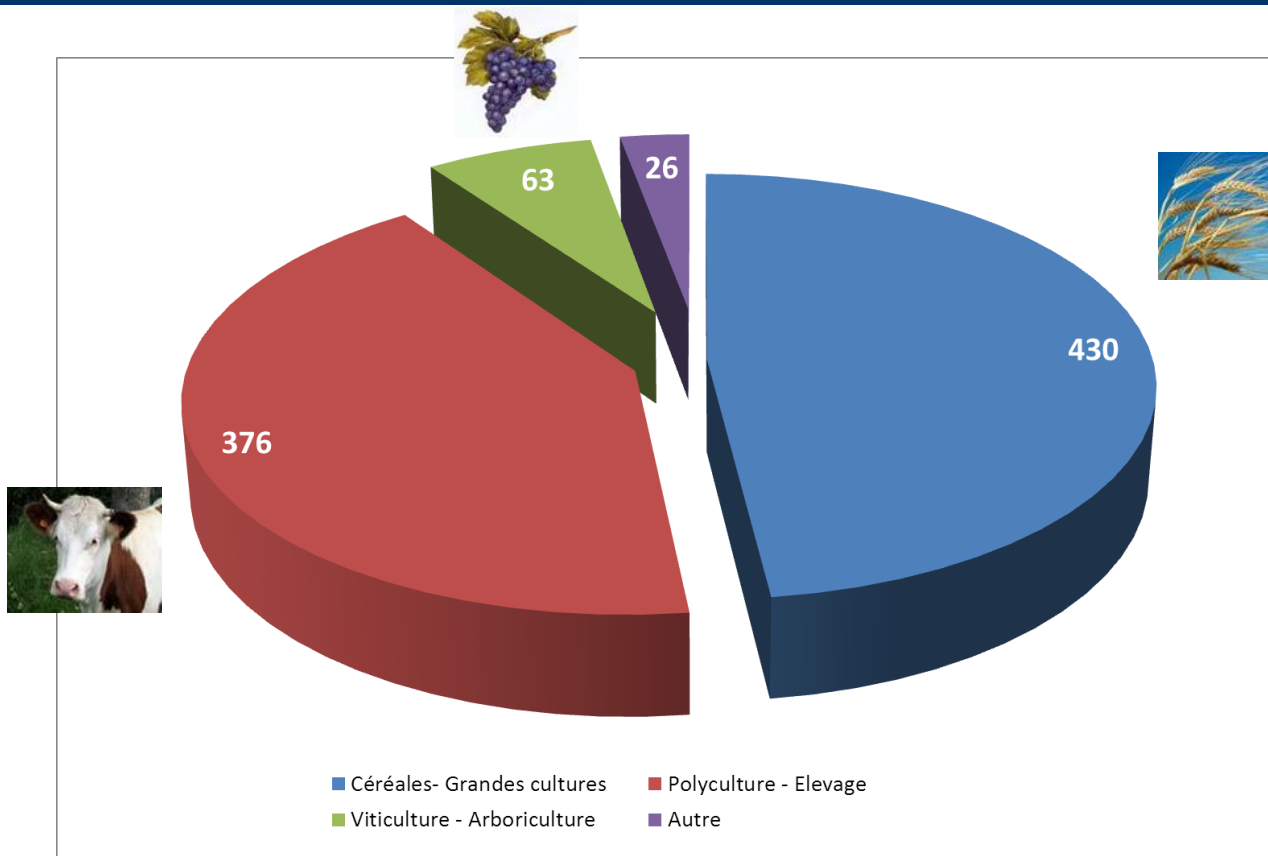


• CASE	• 11	• 26	• 31	• 7	• 19	• 6	• 13	• 113
• CLAAS	• 12	• 26	• 39	• 6	• 25	• 6	• 9	• 123
• DEUTZ	• 6	• 56	• 24	• 4	• 17	• 3	• 24	• 134
• FENDT	• 9	• 31	• 24	• 6	• 31	• 1	• 13	• 115
• JOHN DEERE	• 10	• 38	• 37	• 9	• 13	• 6	• 27	• 140
• MASSEY FER.	• 13	• 36	• 41	• 5	• 23	• 1	• 14	• 133
• MC CORMICK	• 1	• 12	• 13	• 8	• 0	• 3	• 0	• 37
• NEW HOLLAND	• 17	• 35	• 40	• 8	• 25	• 7	• 23	• 155
• SAME	• 4	• 17	• 8	• 4	• 0	• 2	• 0	• 35
• VALTRA	• 13	• 36	• 31	• 1	• 10	• 3	• 8	• 102
• TOTAL	• 96	• 313	• 288	• 58	• 163	• 38	• 131	• 1087

ANSWERS BY BRANCH



ANSWERS BY PRODUCTIONS

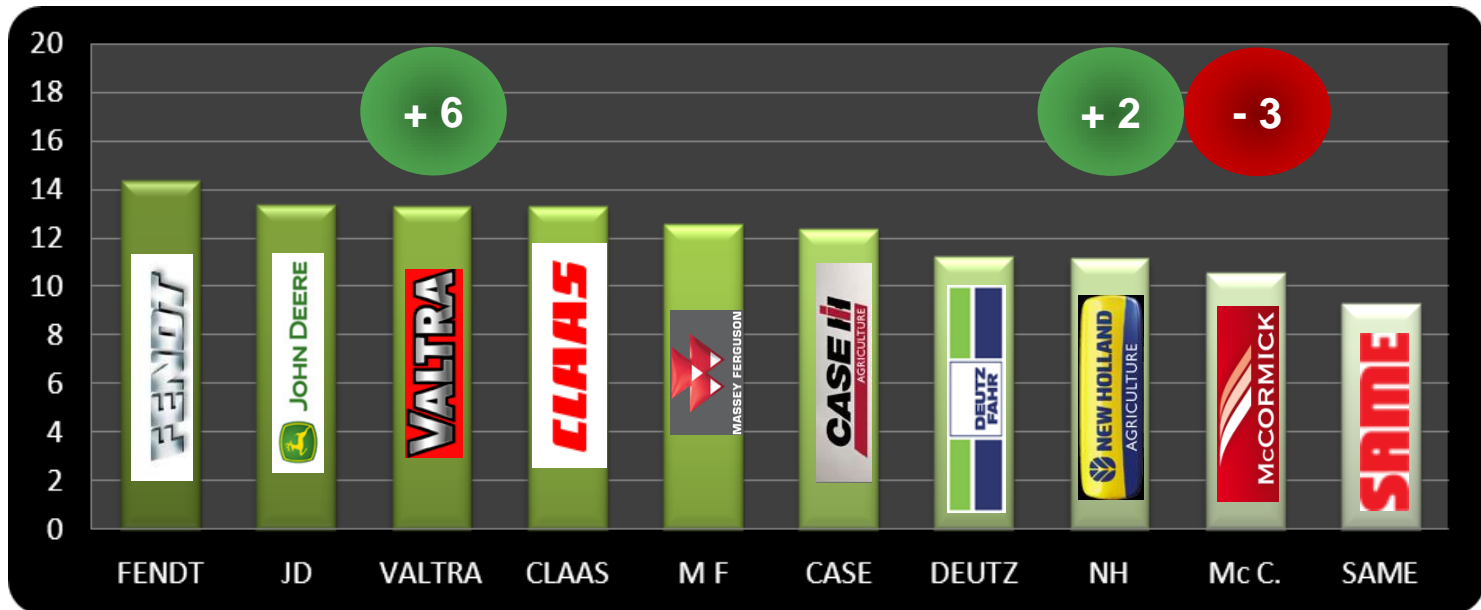
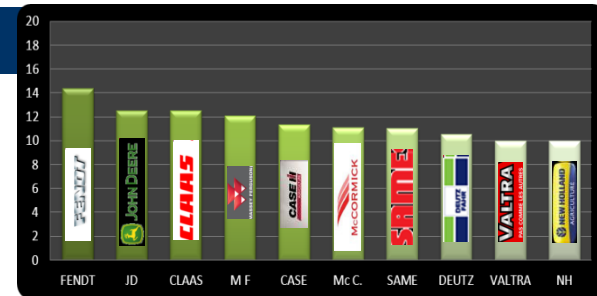


BIG SUCCESS AGAIN

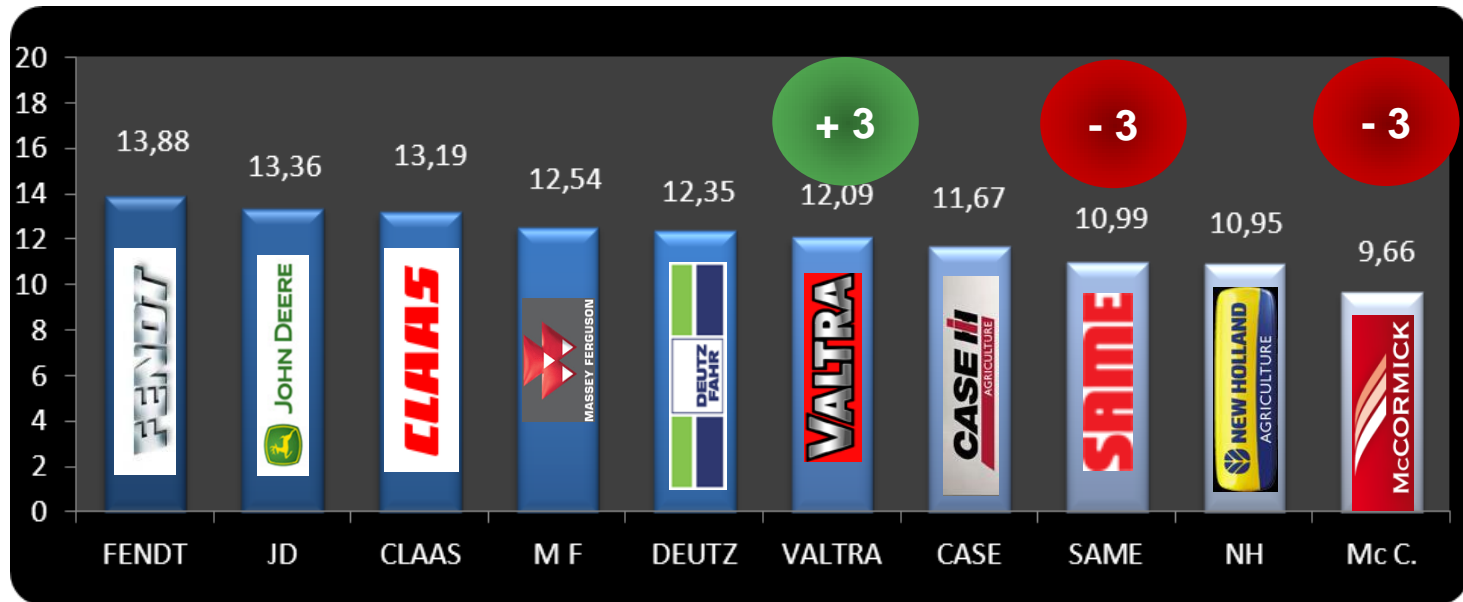
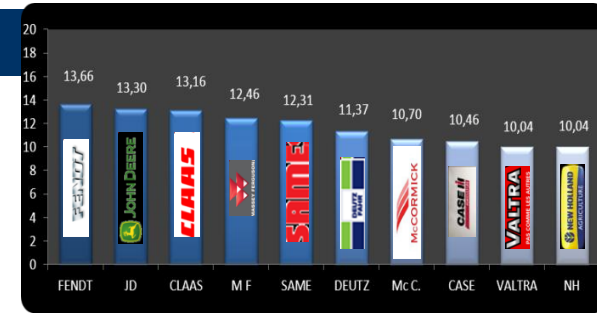
RESULTS*

**Only for congress members*

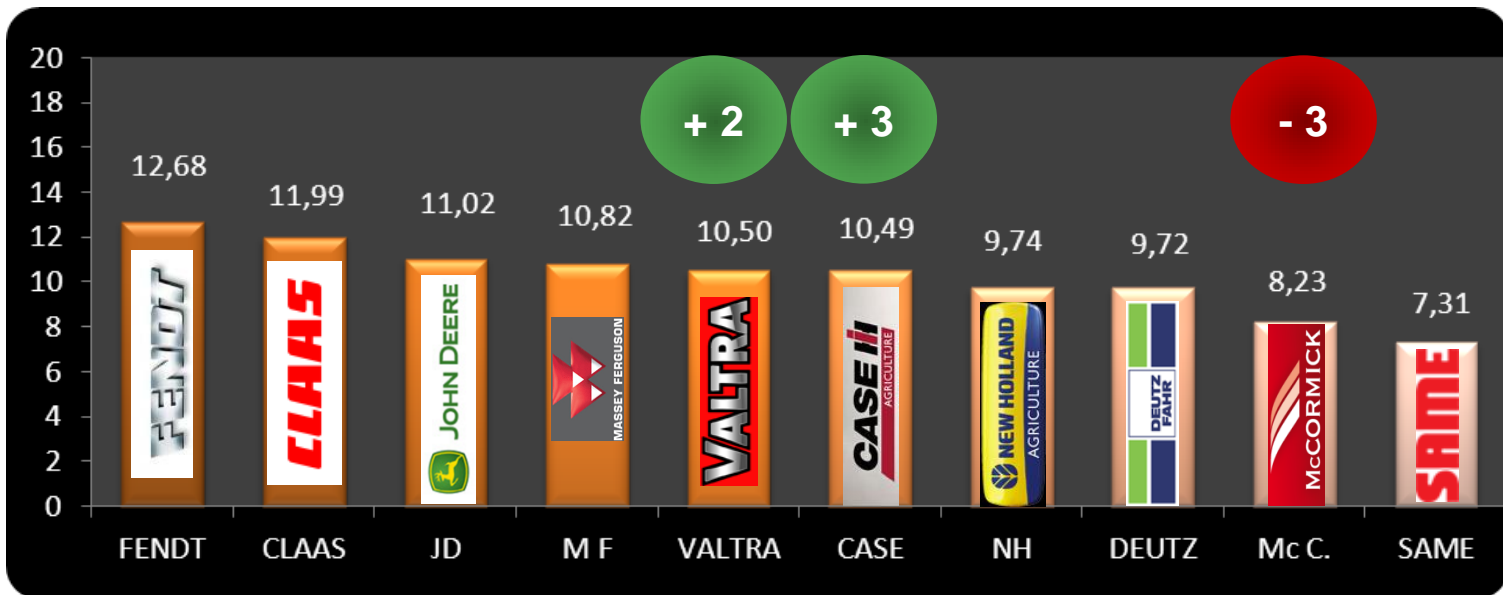
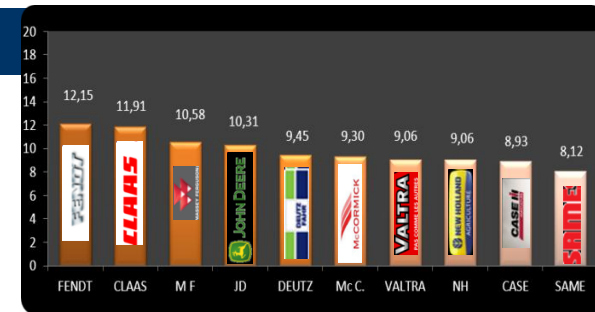
AFTER SALES / GUARANTEES



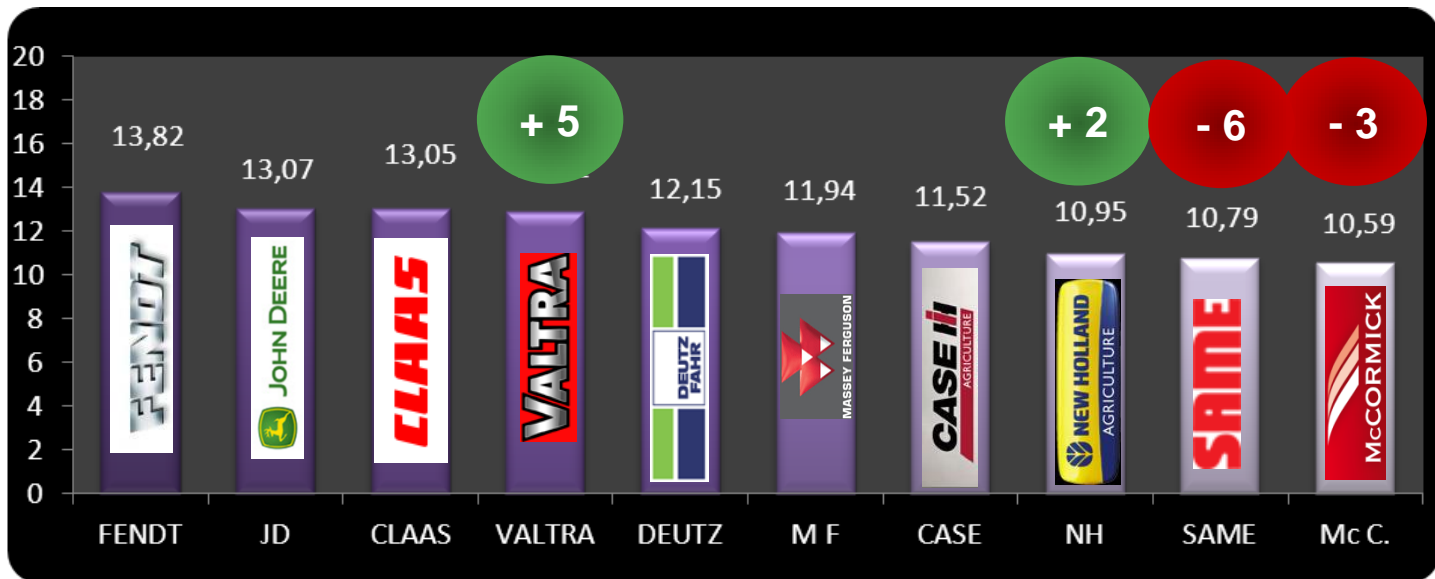
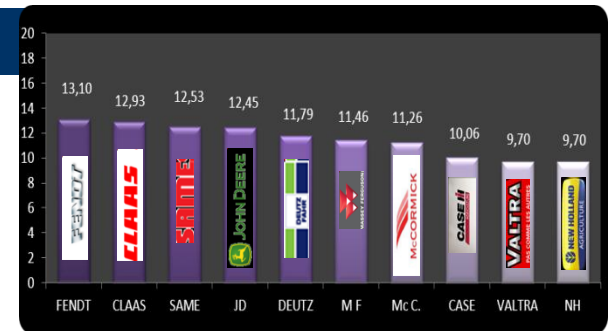
COMPUTER SERVICES



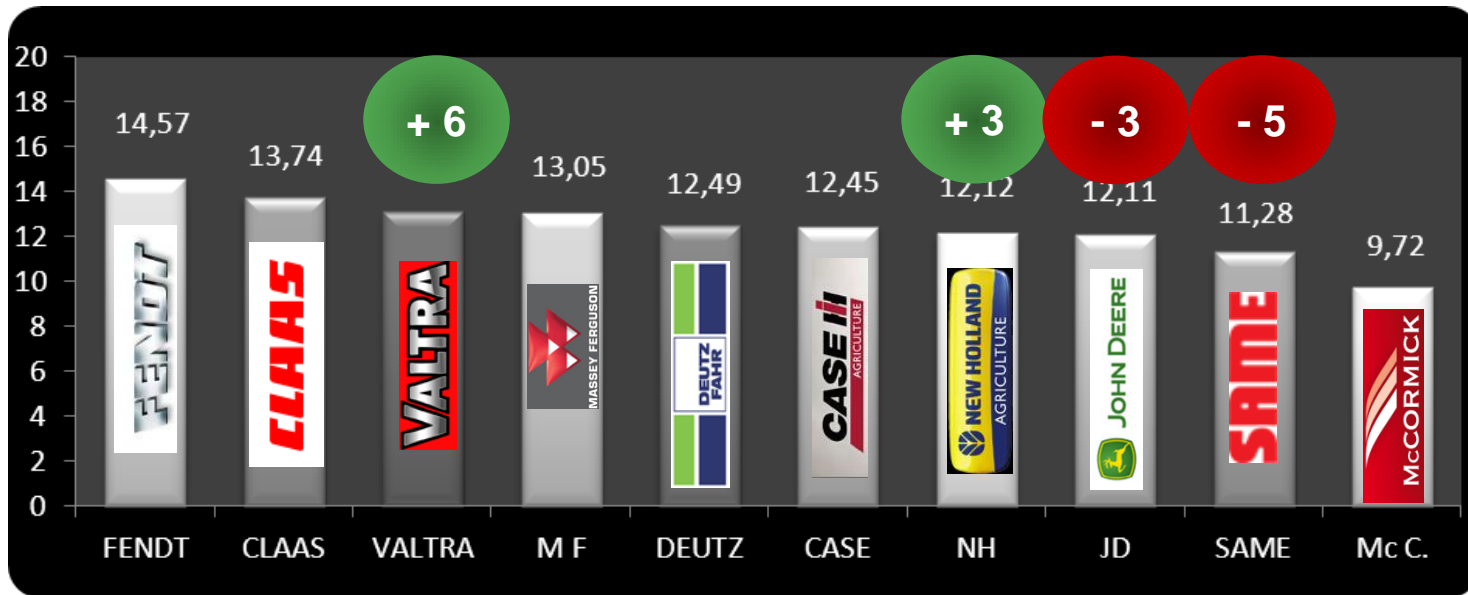
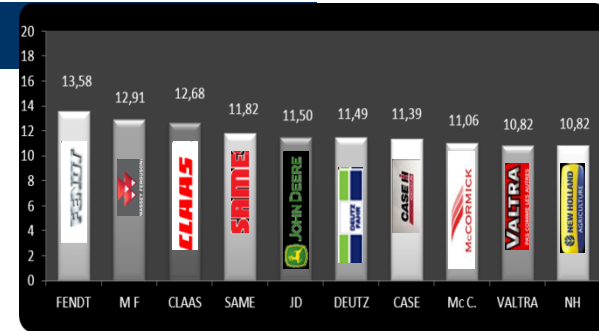
ADVERTISING AND PRODUCT SUPPORT



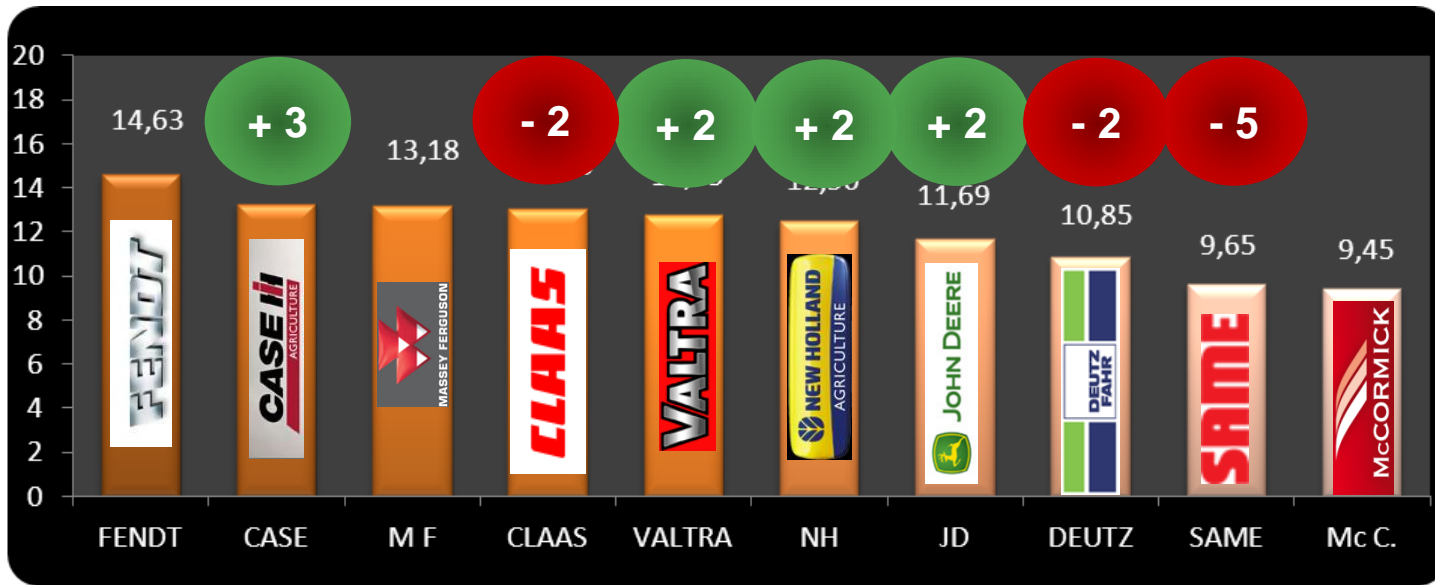
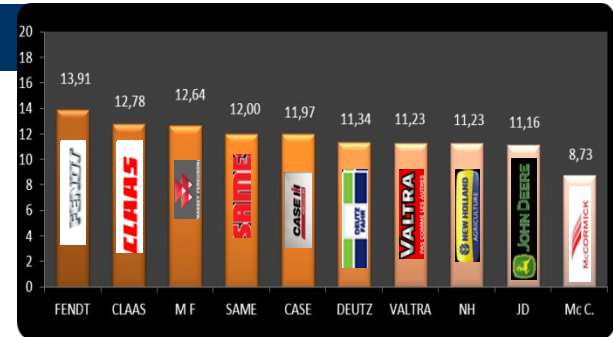
PROCEDURES AND TERMS OF PAYMENT



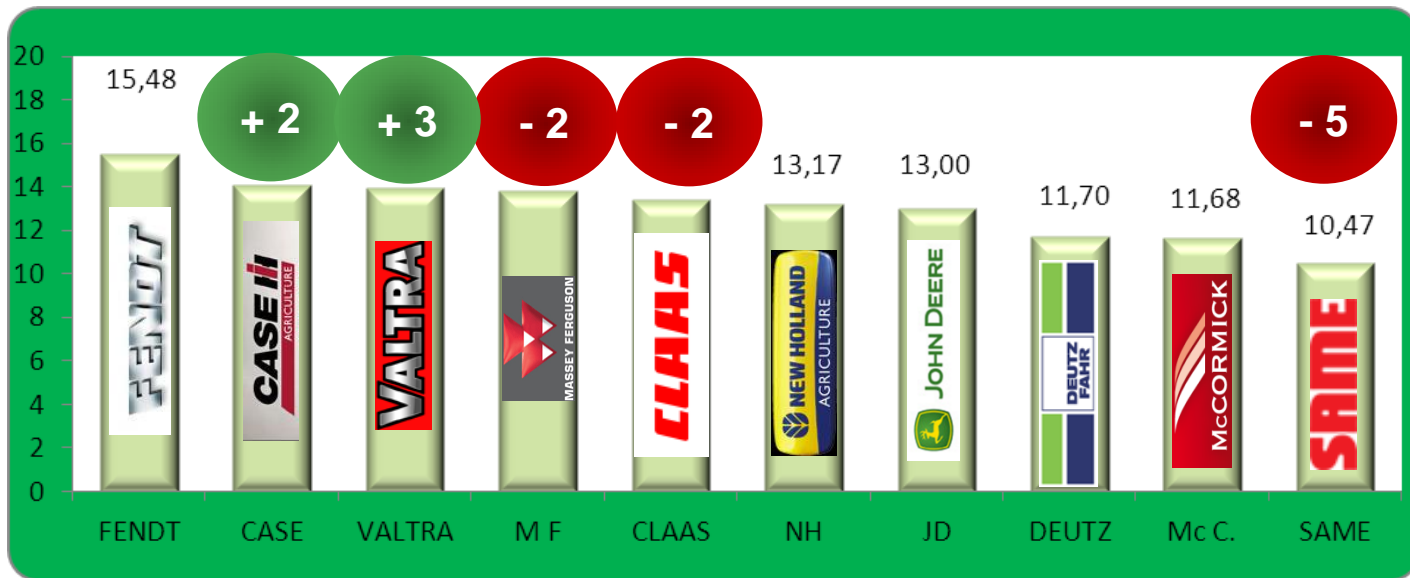
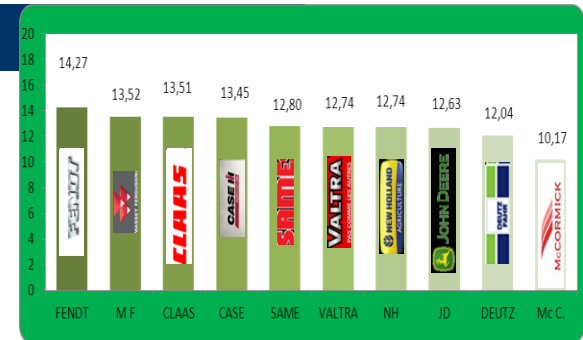
TRAINING



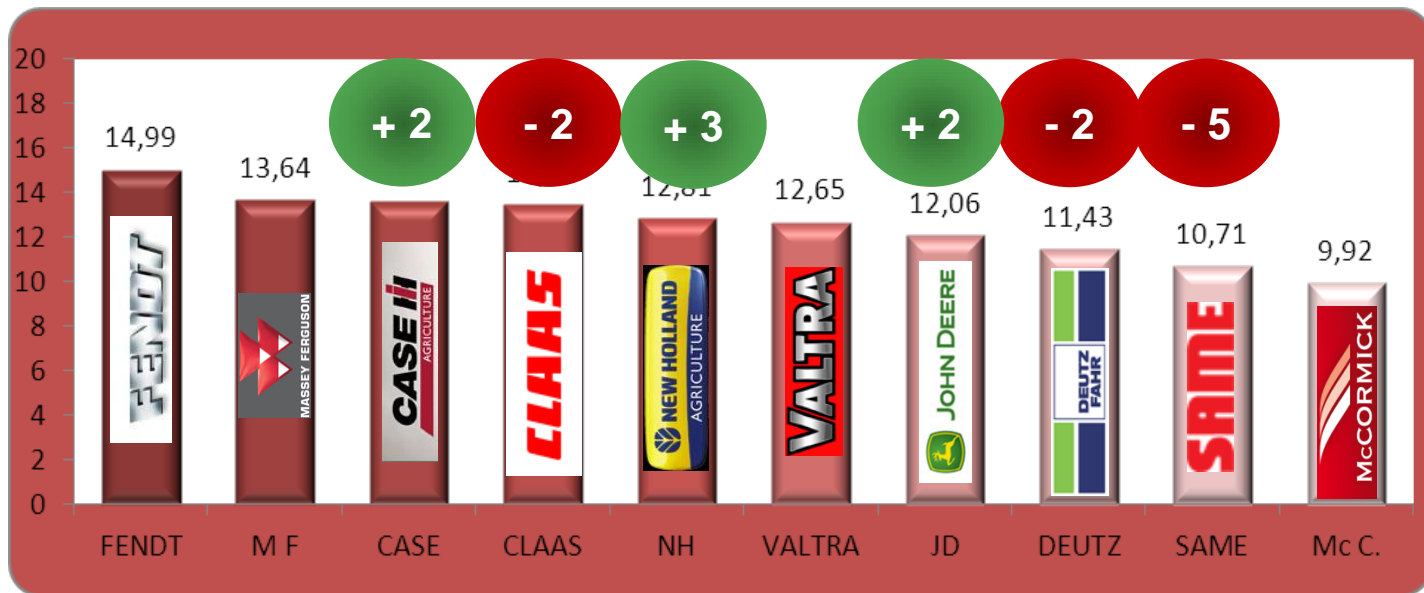
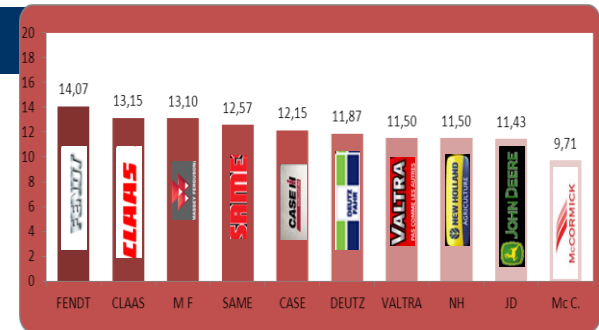
THE MEN



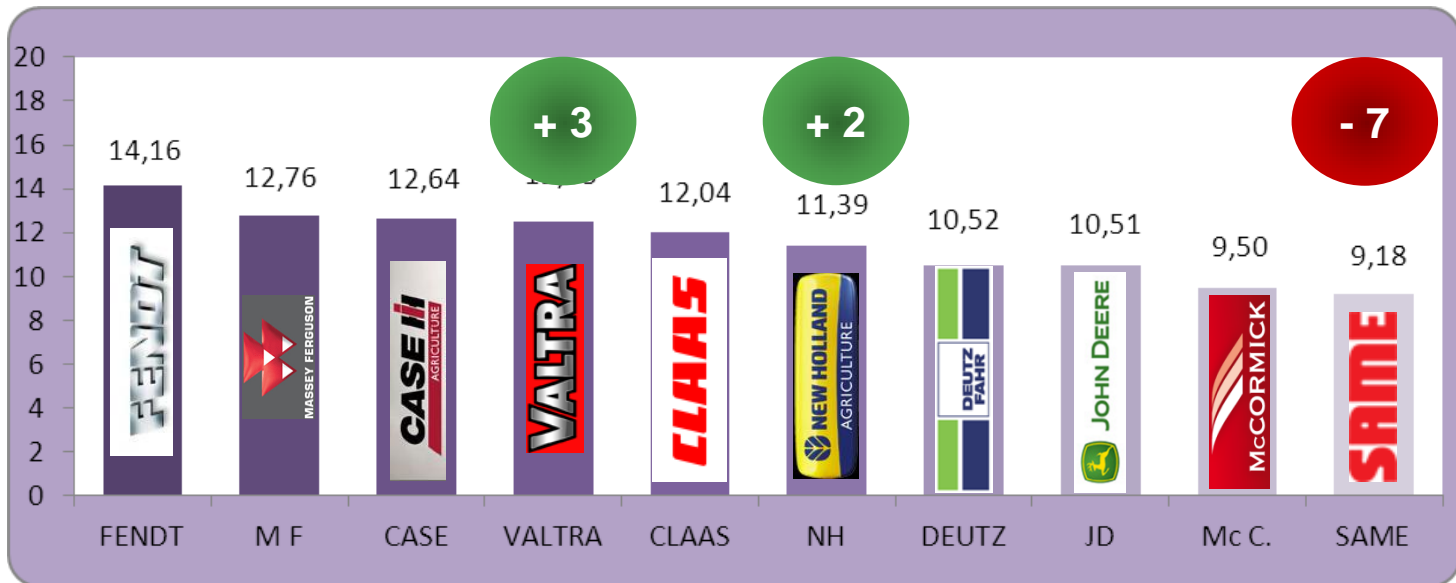
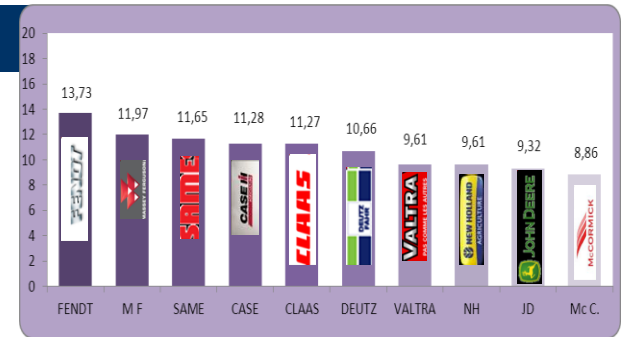
RESPECT OF UNDERTAKEN COMMITMENTS



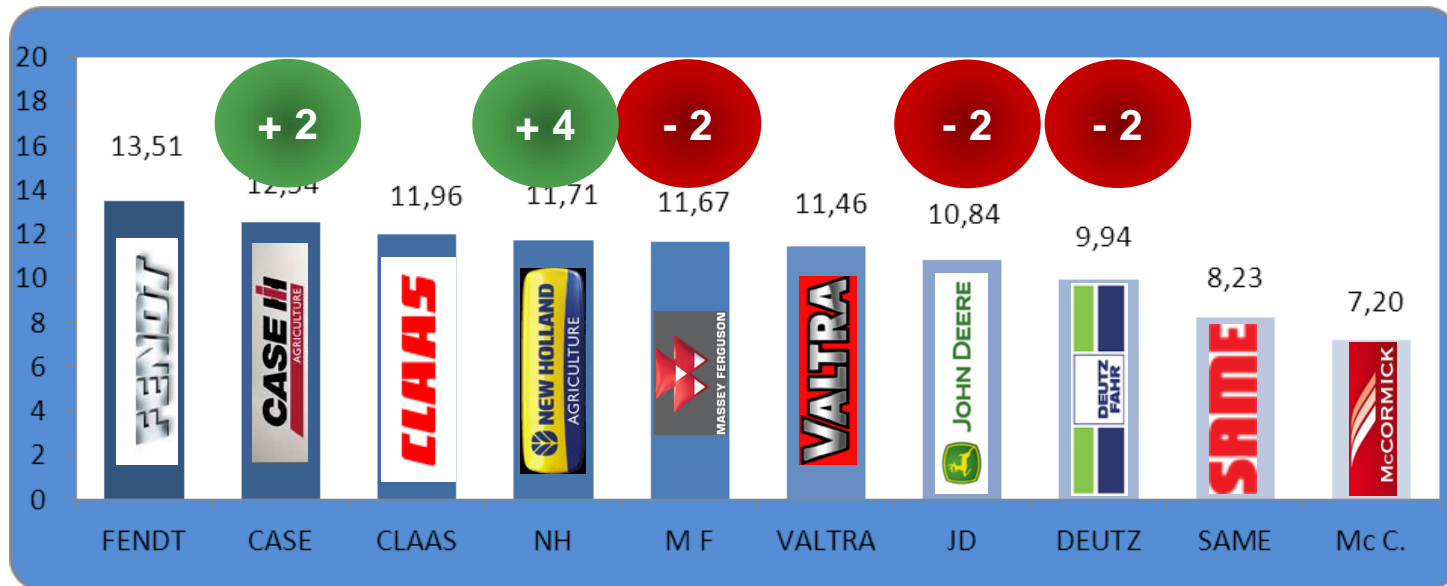
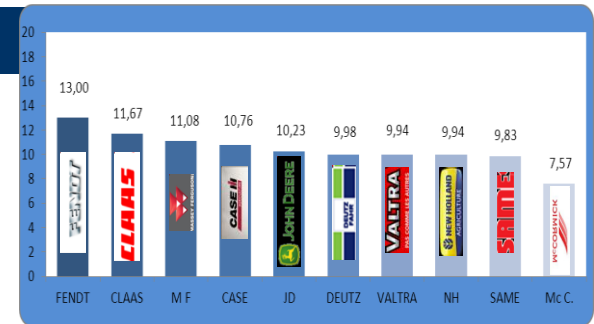
AVAILABILITY OF MANAGERS AND DIRECTORS



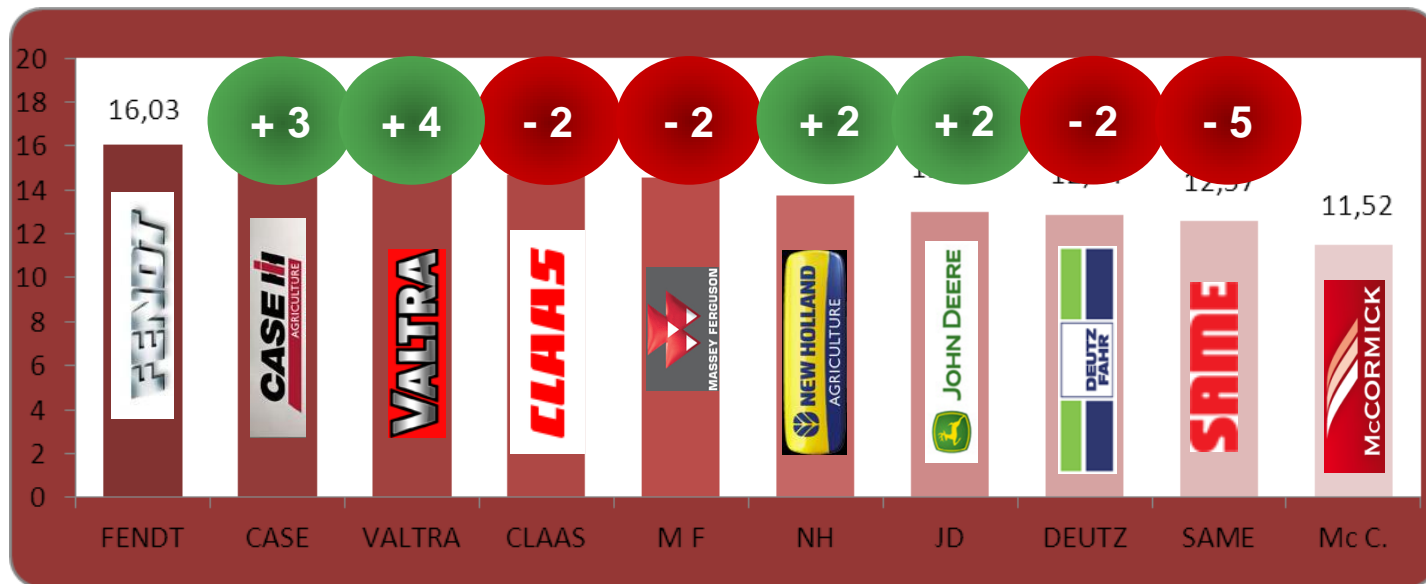
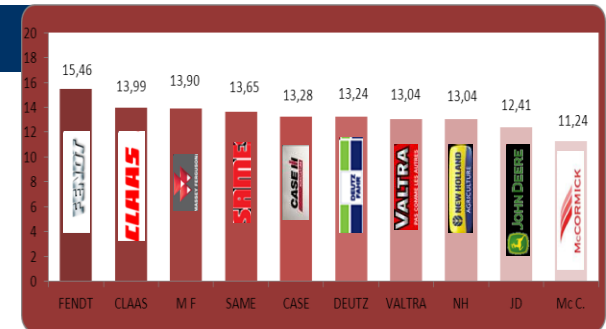
REPRESENTATIVE'S POWER OF LITIGATION SETTLEMENTS



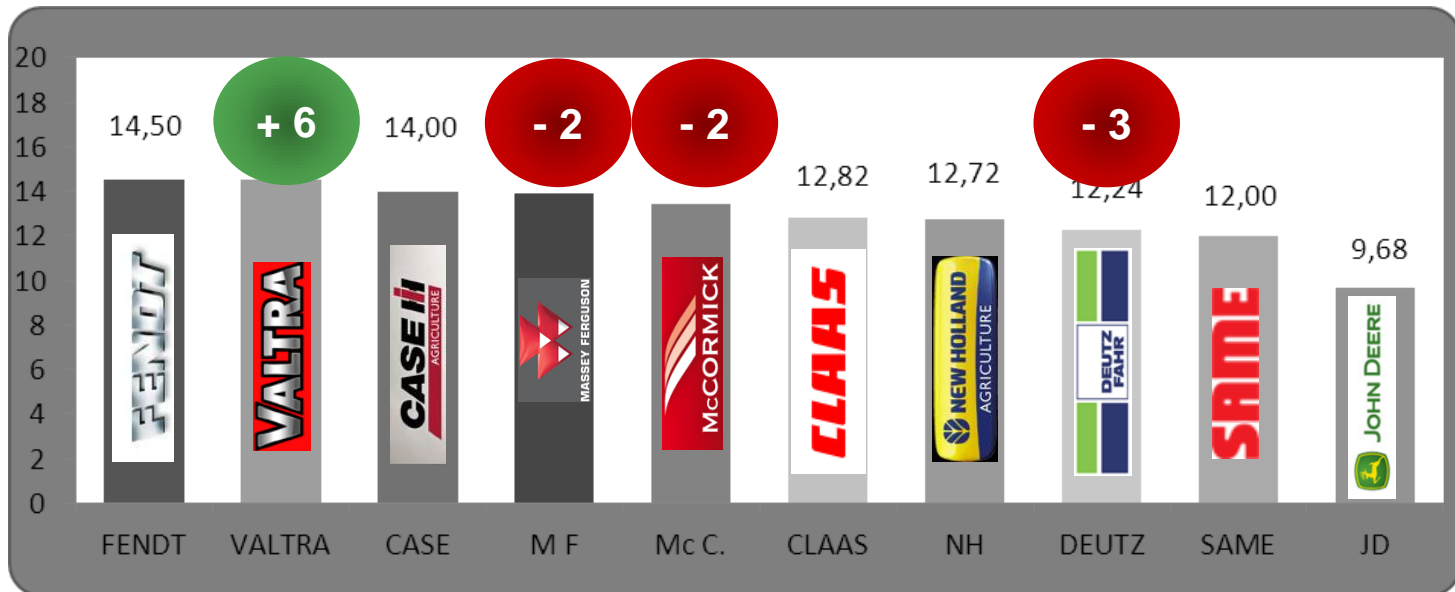
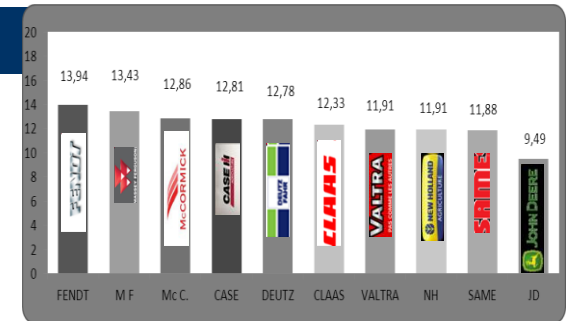
READABILITY AND REALISM OF STRATEGIE



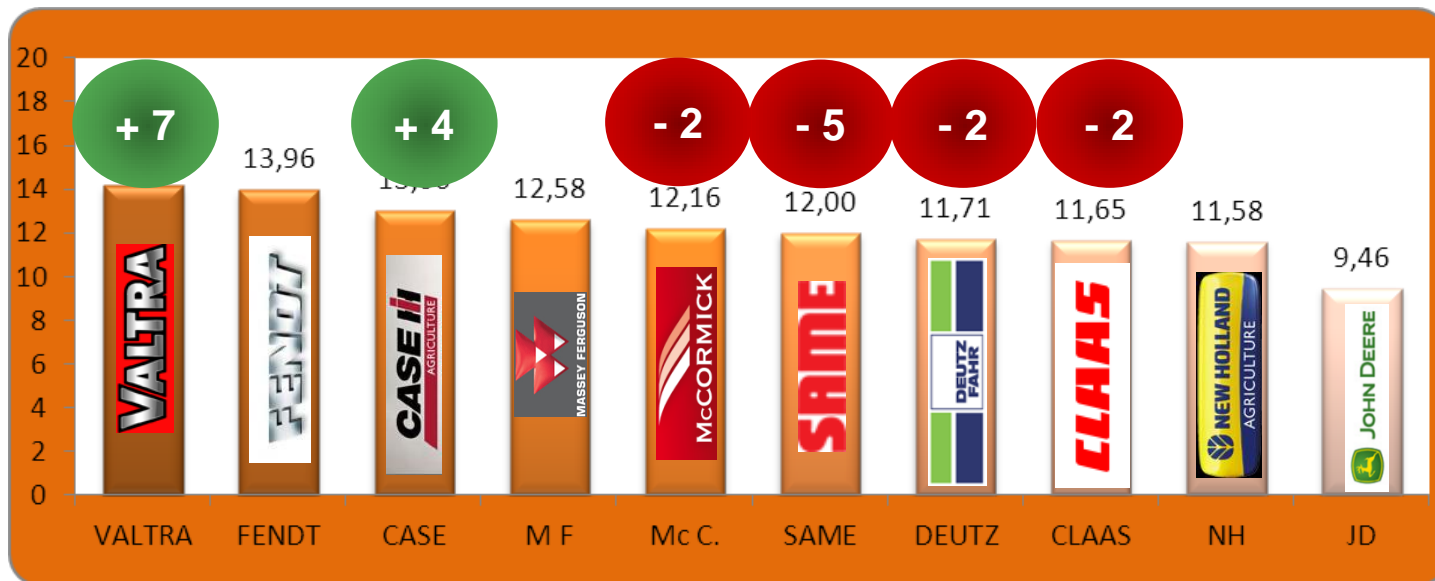
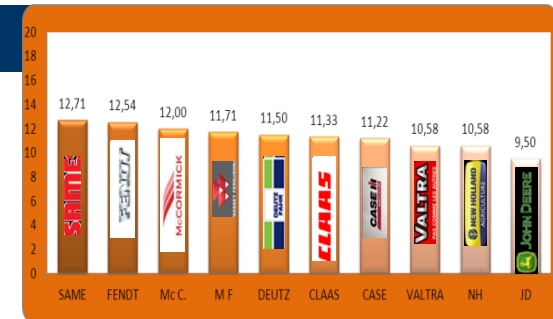
MANUFACTURER-DEALER RELATIONS



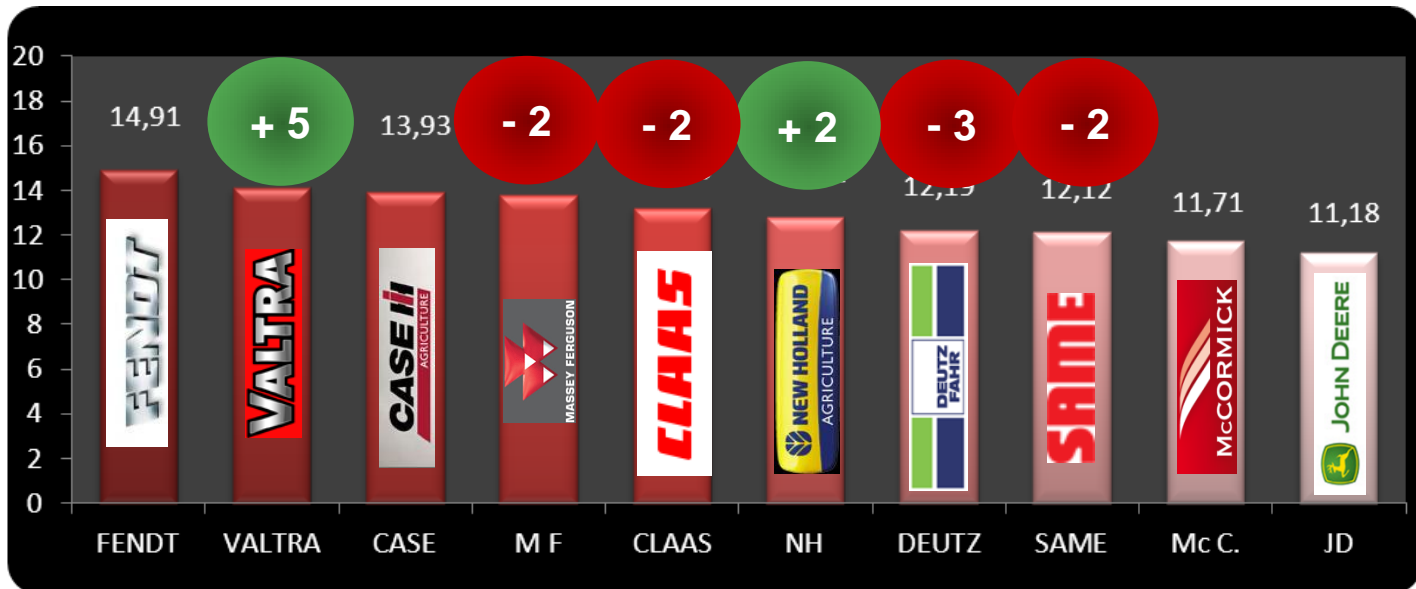
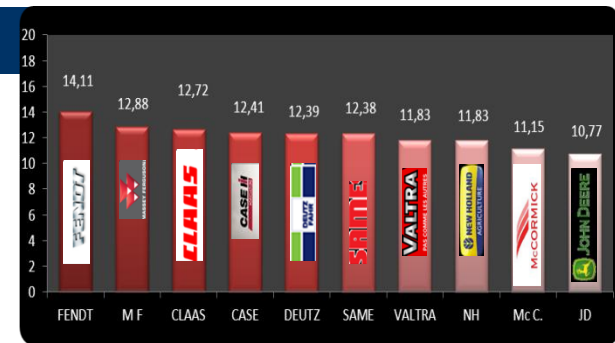
RESPECT OF AUTONOMY



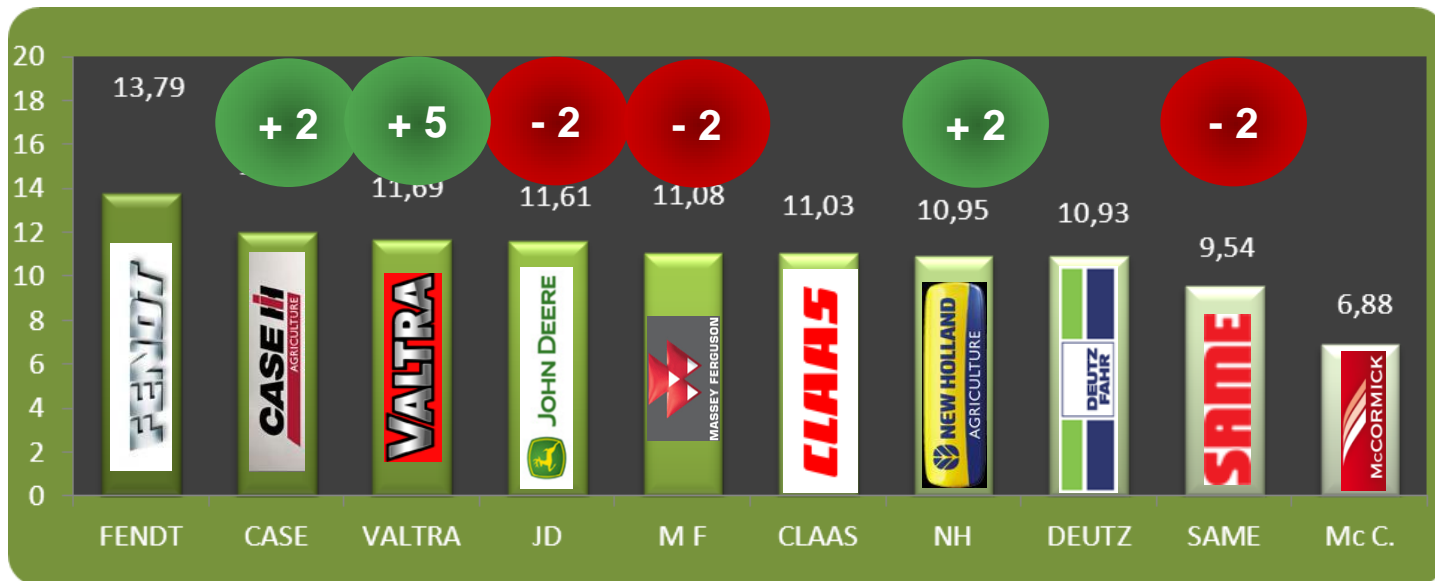
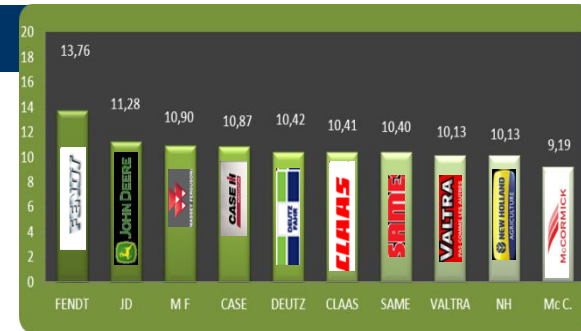
POSSIBILITY OF NEGOCIATING SALES OBJECTIVES



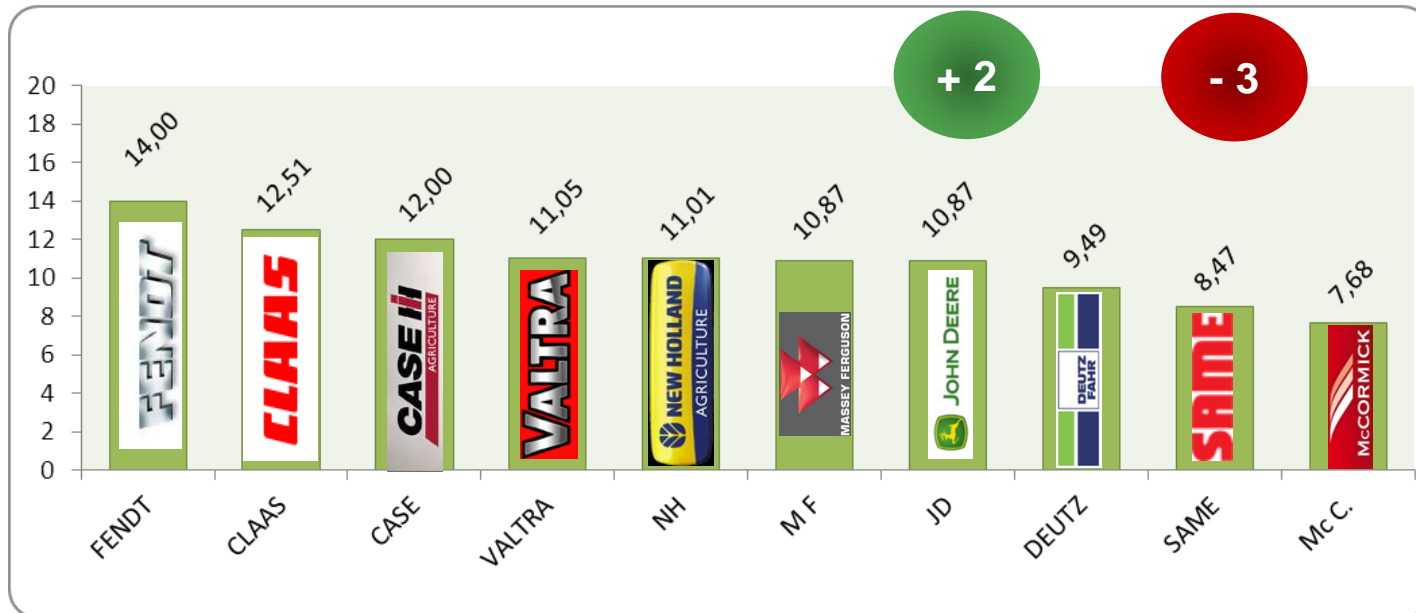
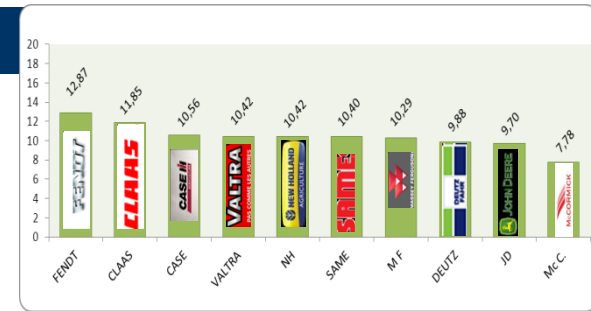
TOTAL RELATION



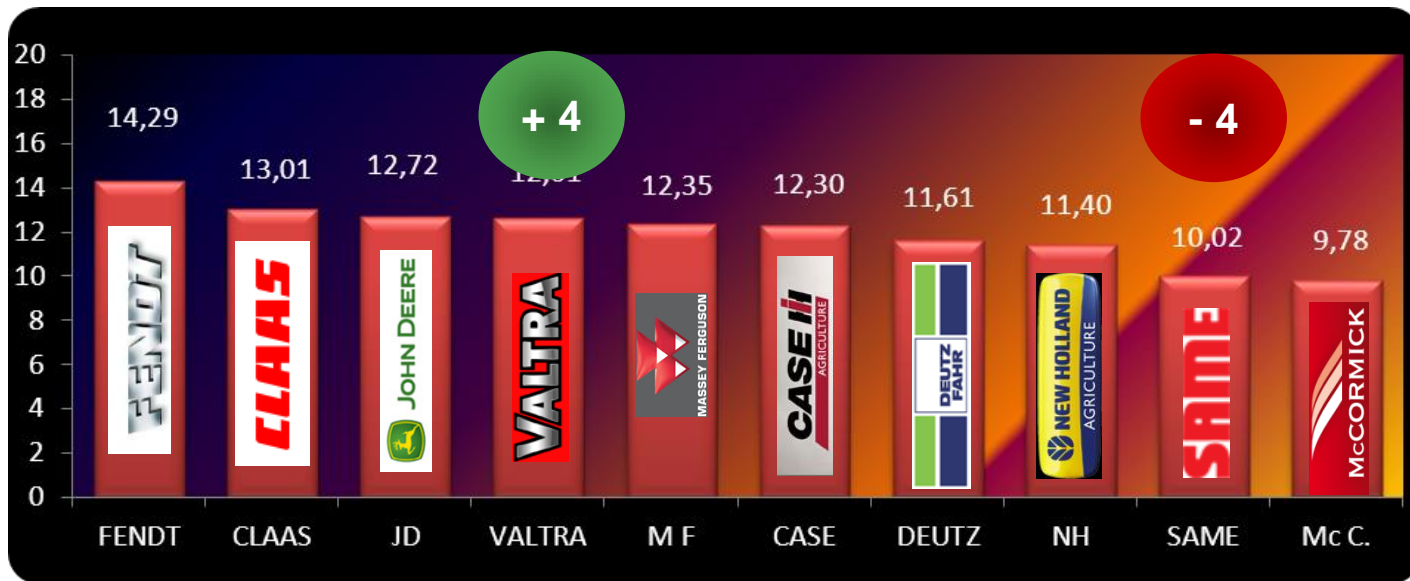
PROFITABILITY HELP



WILLINGNESS TO IMPROVE WEAK POINTS



OVERALL RANCKING



COMPARED RANCKING



• CASE	• 7	• 9	• 2	• 6	• 3	• 6	• 6	• 6
• CLAAS	• 5	• 1	• 6	• 5	• 4	• 5	• 3	• 2
• DEUTZ	• 10	• 8	• 8	• 9	• 8	• 3	• 8	• 7
• FENDT	• 1	• 2	• 1	• 1	• 2	• 1	• 7	• 1
• JOHN DEERE	• 6	• 3	• 5	• 7	• 1	• 7	• 11	• 3
• MASSEY FER.	• 3	• 5	• 4	• 4	• 9	• 4	• 4	• 5
• MC CORMICK	• 11	• -	• 10	• 8	• 10	• 10	• -	• 10
• NEW HOLLAND	• 8	• 10	• 7	• 3	• 6	• 8	• 9	• 8
• SAME	• 12	• 7	• 9	• 10	• -	• 9	• -	• 9
• VALTRA	• 2	• 4	• 3	• 2	• 7	• 2	• 5	• 4

COMPARED RANCKING



1	FENDOT	CLAAS	FENDOT	FENDOT	JOHN DEERE	FENDOT	REFORM	FENDOT
2	VALTRA	FENDOT	CASE II AGRICULTURE	VALTRA	FENDOT	VALTRA	HURLIMANN	CLAAS
3	MASSEY FERGUSON	JOHN DEERE	VALTRA	NEW HOLLAND AGRICULTURE	CASE II AGRICULTURE	DEUTZ FAHR	CLAAS	JOHN DEERE
4	ZETOR	VALTRA	MASSEY FERGUSON	MASSEY FERGUSON	CLAAS	MASSEY FERGUSON	MASSEY FERGUSON	VALTRA
5	CLAAS	MASSEY FERGUSON	JOHN DEERE	CLAAS	STEYER	CLAAS	VALTRA	MASSEY FERGUSON
6	JOHN DEERE	JCB	CLAAS	CASE II AGRICULTURE	NEW HOLLAND AGRICULTURE	CASE II AGRICULTURE	CASE II AGRICULTURE	CASE II AGRICULTURE
7	CASE II AGRICULTURE	SAME	NEW HOLLAND AGRICULTURE	JOHN DEERE	VALTRA	JOHN DEERE	FENDOT	DEUTZ FAHR
8	NEW HOLLAND AGRICULTURE	DEUTZ FAHR	DEUTZ FAHR	McCORMICK	DEUTZ FAHR	NEW HOLLAND AGRICULTURE	DEUTZ FAHR	NEW HOLLAND AGRICULTURE
9	LANDINI	CASE II AGRICULTURE	SAME	DEUTZ FAHR	MASSEY FERGUSON	SAME	NEW HOLLAND AGRICULTURE	SAME
10	DEUTZ FAHR	NEW HOLLAND AGRICULTURE	McCORMICK	SAME	McCORMICK	McCORMICK	AEBI	McCORMICK

WHAT CLIMMAR DECIDED IN 2010

- Each country decides what it publishes for its own results
- CLIMMAR does not publish countries results
- CLIMMAR publishes only overall results

BRAND RESULTS SEND TO MANUFACTURERS

VIRTUAL BRAND

	BRAND RESULTS			OVERALL RESULTS		
	TOTAL RESPONSES	GRADE OUT OF 20	RANKING OUT OF 10	OVERALL AVERAGE	THE LOWEST	THE HIGHEST
I. BRAND IMPACT						
Positive features of your manufacturer's image in the agricultural world	30	13,1	6	13,5	8,2	16,7
Reliability of tractors	30	13,7	5	13,5	10,6	16,9
Adaptation of tractors to your market	30	14,7	1	13,2	10,2	14,7
Lasting quality of your brand	30	13,3	8	14,0	6,9	18,0
Level of innovation and development	30	12,9	7	13,3	9,3	16,4
		13,5	7	13,5	10,1	16,9
II. MARKETING OF TRACTORS						
Effectiveness of sales assistance	30	11,7	4	10,9	7,6	14,2
Availability of tractors (waiting times, order modifications)	30	10,8	4	9,8	2,9	14,1
Respect of delivery deadlines	30	12,1	5	11,5	2,9	17,0
Quality-price relation	30	12,1	2	10,9	9,3	12,4
Contribution of your supplier to the sale of second-hand equipment	30	3,7	7	5,2	1,6	10,2
		10,1	5	9,7	5,2	12,8
III. MARKETING OF SPARE PARTS						
Effectiveness of sales assistance	30	9,5	8	10,6	8,8	13,0
Availability of parts	30	13,7	6	13,0	9,6	15,9
Respect of delivery deadlines	30	13,7	6	13,0	9,2	15,4
Quality-price relation	30	11,5	5	11,6	10,3	13,9
Protection level of your brand against a similar market	30	9,1	8	10,2	3,8	15,3
		11,5	6	11,7	9,2	14,4
IV. AFTER-SALES SERVICE GUARANTEES						
Effectiveness of manufacturer's technical assistance	30	12,7	5	12,3	9,0	15,3
Quality and quantity of documentation	30	13,5	6	13,3	10,8	15,7
Updating of documentation	30	13,3	5	13,5	11,1	15,9
Reimbursement of guaranteed work	30	10,9	5	10,9	6,8	13,8
Possibility of free reconditioning	30	9,6	5	9,1	6,0	12,7
		12,0	4	11,8	8,8	14,7
V. COMPUTER SERVICES						
Willingness of the manufacturer to facilitate computer communications with your system	30	10,1	5	10,8	8,7	13,2
Cost of establishment and utilisation of computer communications	30	9,2	6	9,5	7,7	13,3
Reliability and readability of tractor price lists and spare parts on the Internet	30	10,3	9	12,7	10,0	16,0
Your employee's ease of access to information provided by your manufacturer	30	12,0	8	12,8	9,6	14,9
Competence of your manufacturer's computer representative	30	10,4	6	10,9	6,9	14,1
		10,4	8	11,4	9,4	13,7
VI. ADVERTISING AND PRODUCT SUPPORT MATERIAL						
Advertising budget of your manufacturer	30	10,1	6	10,6	7,7	13,8
Effectiveness of your manufacturer's advertising	30	11,9	5	11,8	9,6	14,1
Your manufacturer's level of participation in your advertising	30	8,3	5	9,3	4,9	13,9
Your manufacturer's adaptation to your Internet/second-hand trade needs	30	3,7	9	7,1	3,1	11,6
Quality of CDs and other support that help sales	30	11,7	6	11,4	7,2	14,3
		9,1	7	10,1	7,5	12,7

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BRAND RESULTS SEND TO MANUFACTURERS

VIRTUAL BRAND

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I. BRAND IMPACT						
Positive features of your manufacturer's image in the agricultural world	30	13,1	6	13,5	8,2	18,7
Reliability of tractors	30	13,7	5	13,5	10,8	16,9
Adaptation of tractors to your market	30	14,7	1	13,2	10,2	14,7
Lasting quality of your brand	30	13,3	8	14,0	6,9	18,0
Level of innovation and development	30	12,9	7	13,3	9,3	18,4
		13,5	7	13,5	10,1	16,9
II. MARKETING OF TRACTORS						
Effectiveness of sales assistance	30	11,7	4	10,9	7,8	14,2
Availability of tractors (waiting times, order modifications)	30	10,8	4	9,8	2,9	14,1
Respect of delivery deadlines	30	12,1	5	11,5	2,9	17,0
Quality-price relation	30	12,1	2	10,9	9,3	12,4
Contribution of your supplier to the sale of second-hand equipment	30	3,7	7	5,2	1,6	10,2
		10,1	5	9,7	5,2	12,8
III. MARKETING OF SPARE PARTS						
Effectiveness of sales assistance	30	9,5	8	10,6	8,8	13,0
Availability of parts	30	13,7	6	13,0	9,6	15,9
Respect of delivery deadlines	30	13,7	6	13,0	9,2	15,4
Quality-price relation	30	11,5	5	11,6	10,3	13,9
Protection level of your brand against a similar market	30	9,1	8	10,2	3,8	15,3
		11,5	6	11,7	9,2	14,4
IV. AFTER-SALES SERVICE GUARANTEES						
Effectiveness of manufacturer's technical assistance	30	12,7	5	12,3	9,0	15,3
Quality and quantity of documentation	30	13,5	6	13,3	10,8	15,7
Updating of documentation	30	13,3	5	13,5	11,1	15,9
Reimbursement of guaranteed work	30	10,9	5	10,9	6,8	13,8
Possibility of free reconditioning	30	9,6	5	9,1	6,0	12,7
		12,0	4	11,8	8,8	14,7
V. COMPUTER SERVICES						
Willingness of the manufacturer to facilitate computer communications with your system	30	10,1	5	10,8	8,7	13,2
Cost of establishment and utilisation of computer communications	30	9,2	6	9,5	7,7	13,3
Reliability and readability of tractor price lists and spare parts on the Internet	30	10,3	9	12,7	10,0	16,0
Your employee's ease of access to information provided by your manufacturer	30	12,0	8	12,8	9,6	14,9
Competence of your manufacturer's computer representative	30	10,4	6	10,9	6,9	14,1
		10,4	8	11,4	9,4	13,7
VI. ADVERTISING AND PRODUCT SUPPORT MATERIAL						
Advertising budget of your manufacturer	30	10,1	6	10,6	7,7	13,8
Effectiveness of your manufacturer's advertising	30	11,9	5	11,8	9,6	14,1
Your manufacturer's level of participation in your advertising	30	8,3	5	9,3	4,9	13,9
Your manufacturer's adaptation to your Internet/second-hand trade needs	30	3,7	9	7,1	3,1	11,6
Quality of CDs and other support that help sales	30	11,7	6	11,4	7,2	14,3
		9,1	7	10,1	7,5	12,7

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RESULTS GIVEN TO THE PRESS

BRAND XX

	BRAND RESULTS					
	GRADE			RANKING		
	2005	2006	2007	2005	2006	2007
V. COMPUTER SERVICES						
Willingness of the manufacturer to facilitate computer communications with your system	9,0	8,8	9,2	7	10	8
Cost of establishment and utilisation of computer communications	7,9	7,5	7,2	9	10	10
Reliability and readability of tractor price lists and spare parts on the Internet	9,3	8,5	9,8	9	10	10
Your employer's ease of access to information provided by your manufacturer	11,4	10,9	10,8	5	9	10
Competence of your manufacturer's computer representative	8,2	7,5	9,1	9	10	8
	9,2	8,7	9,2	9	10	10
VI. ADVERTISING AND PRODUCT SUPPORT MATERIAL						
Advertising budget of your manufacturer	7,2	7,5	10,9	9	9	6
Effectiveness of your manufacturer's advertising	8,4	8,6	10,9	9	9	8
Your manufacturer's level of participation in your advertising	4,1	4,5	6,2	9	9	8
Your manufacturer's adaptation to your Internet/second-hand trade needs	4,8	3,8	3,7	9	9	9
Quality of CDs and other support that help sales	8,8	8,5	9,5	7	9	9
	6,6	6,6	8,2	10	9	8
VII. PROCEDURES AND TERMS OF PAYMENT						
Follow-up reliability	10,0	10,7	11,7	10	10	9
Simplicity of guarantee claims procedures	8,8	8,0	9,2	8	9	9
Reimbursement speed by your manufacturer of the sums he owes you	6,8	8,1	10,9	10	10	7
Terms of payment for tractors	9,8	10,1	9,4	7	7	9
Terms of payment for spare parts	11,8	12,0	12,1	4	3	4
	9,4	9,8	10,7	9	9	9
VIII. TRAINING						
Quality/price relation of training programmes organised by your manufacturer	7,4	7,8	8,1	8	9	8
	10,1	9,4	10,5	9	10	8
IX. MANUFACTURER-DEALER RELATIONS						
Quality of relations with your manufacturer	11,0	11,4	13,1	6	6	6
Your manufacturer's respect of your autonomy as head of your enterprise	11,6	12,5	13,9	7	6	5
Possibility of negotiating sales objectives	8,4	9,4	10,9	7	7	5
Your degree of confidence in the managers of your manufacturer	8,0	9,3	11,6	9	9	6
	10,0	10,8	12,6	7	7	6
XI. PROFITABILITY HELP						
Your manufacturer's contribution to the profitability of your enterprise	6,7	6,9	8,1	10	10	9
IMPROVEMENT?						
How do you judge the willingness of your tractor operator to improve his weak points?			11,2			5
Which appreciation do you give to the concrete actions realized by your tractor operator ?			11,2			4
OVERALL TOTAL	8,2	8,2	10,6	9	10	8

no results about men

Only 24 items

2011 : WHAT WILL CLIMMAR DECIDE ?

- CLIMMAR publishes overall European results, but only for 24 items

Do you agree that :

- CLIMMAR publishes all the 52 items ?
 - in each country for its own members ?
 - in each country for local directions of manufacturers ?
 - to the European directions of manufacturers ?

NEXT YEAR



WHO WILL JOIN US ?



**FOR MORE
SUCCESS !**