

Report Austria

Mag. Hansjörg Stöckl President ARGE Landtechnik









- National initiative by WKO Federal Trade Division ongoing since 2018, continued for the 7th time in 2025
 - Goal: Strengthen image of apprenticeships and counteract skilled labour shortage
 - Channels: Snapchat, TikTok new in 2025: YouTube → reaching 13-17-year-olds directly
 - Strong results: Engagement rates well above benchmarks authentic visuals, relatable messaging









 National initiative by WKO Federal Trade Division - ongoing since 2018, continued for the 7th time in 2025











- EuroSkills: Showcasing Europe's best young professionals. Austria consistently among top performers.
 - ➤ Total: 12 medals → 6 Gold, 3 Silver, 3 Bronze
 - ➤ Highlight: 1 Gold Medal in Automotive Technology strong signal for vehicle engineering









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Collective agreements

- Many Austrian sectors are currently negotiating their collective agreements.
 - In September 2025, Austria's metal industry reached a new wage agreement: 2% increase in collective wages and 1.41% in actual incomes plus two bonuses
 - For the trade sector, the union is demanding a 4.8% pay increase for over 430,000 employees and 15,000 apprentices, while employers are offering 2.8%; negotiations will continue in November









Trade/supply chain disruptions

Contract Conditions & Price Risks

- > Growing market pressure on dealers: Supplier agreements include clauses allowing one-sided changes in prices or terms.
- > Results:
 - Dealers bear the entire price risk
 - Loss of calculation security and competitiveness.
- Need for action: Strengthening the dealer position within supply chains legally and politically.







Presidents Report

New CEO:

Isabelle Huyghe

→ Michel is retiring in december

Niche-event about nitrogin emmission reduction for farmers:

- 250 farmers
- 14 companies
- An interem target for a reduction of 5% for the end of 2025













Education









Welkom in de sector

Beste afgestudeerde,

Fedagrim, Federatie voor landbouw- en tuinmechanisatie heet je welkom in de sector. We willen je bij deze **feliciteren met het halen van je diploma**. Voor gemotiveerde jongeren, die graag sleutelen aan landbouw- en tuinmachines, zoals jij werd er een platform gelanceerd, namelijk www.agrojobs-gardenjobs.be Op dit platform vind je de recentste vacatures uit de sector.

Agrojobs — Gardenjobs is dé ontmoetingsplaats voor technici die gepassioneerd zijn door land— en tuinbouwmechanisatie. Ben jij een technicus die klaar is om jouw expertise in te zetten in deze boeiende sector? Zoek jij een technische functie die je in contact brengt met State of the Art technologie zonder je voeling met de bodem te verliezen? Dan ben je hier aan het juiste adres!

Stap binnen in onze wereld van mogelijkheden, waar werkgevers op zoek zijn naar technisch talent dat klaarstaat om hun vaardigheden toe te passen in de mechanisatie van land- en tuinbouw. Van geavanceerde landbouwmachines tot innovatieve tuinbouwtechnologieën, wij bieden een breed scala aan kansen voor technici die willen gedijen in deze bloeiende sector.

Of je nu nog verder studeert of aan de slag wil op de arbeidsmarkt, een job in onze sector is de kans om jouw expertise verder te ontwikkelen, of gewoon een stimulerende werkomgeving waar je jouw passie voor techniek kunt delen, Agrojobs – Gardenjobs heeft voor elk wat wils. Gebruik onze geavanceerde zoekfilters om snel en efficiënt de perfecte match te vinden voor jouw vaardigheden en ambities.

Wacht niet langer! Volg onze community van technische experts in de land- en tuinbouwmechanisatie op https://www.facebook.com/agrojobsbelgium en zet jouw carrière in de hoogste versnelling!

Naar de website

Volg ons op facebook







- New Tractor at Vives Kortrijk (autotechnology school)

- 383 measuring tapes and a welcoming letter to graduation pupils/students







Subsidies

Example of an issue

- Avg. Cost for Disk harrow is 20.000 Euros
- Subsidies are 40% (for agro-ecological use)





- Farmers get 8.000 euro of subsidies for a Disk Harrow (they get 8k, if they buy cheap or expensive
- Suddenly a new player arrives on the Belgian market with Disk Harrows with prices around 8.000 euros, quality is not verified → Farmers talking about 'I bought one of those free machines...'
- At the end Governement should adapts avg. cost estimate to 8.000 Euros...
 - Subsidies going down because farmers buy rubbish
- FYI: Governement changed in this case to 3 quotations for a machine (for now, next CAP, it would become impossible to work with quotations.)













Tomáš Kvapil president



Martin Jurkovič secretary general

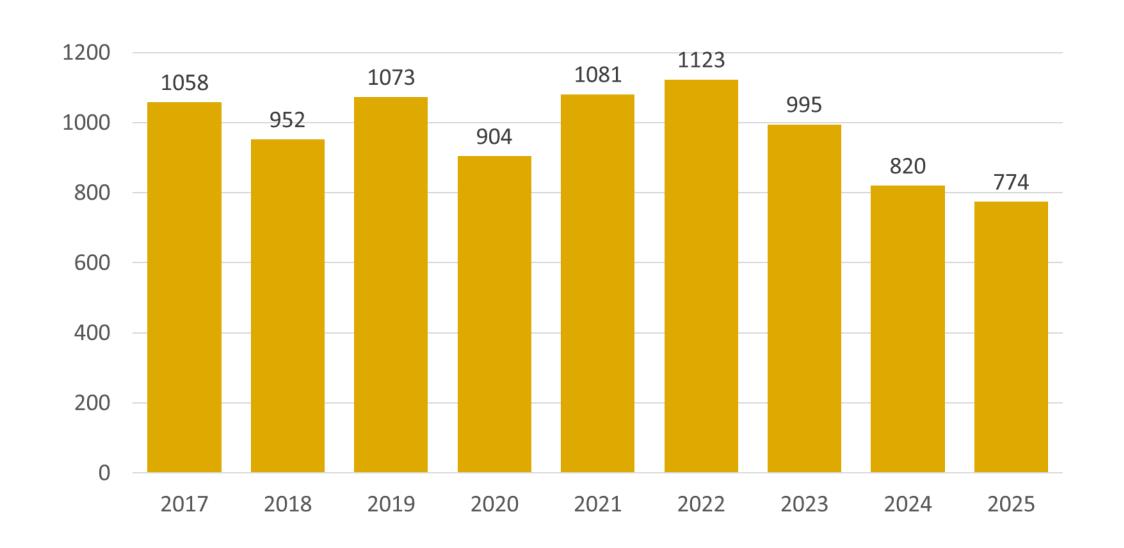






TRACTOR SALES DEVELOPMENT IN THE 1ST HALF OF THE YEAR



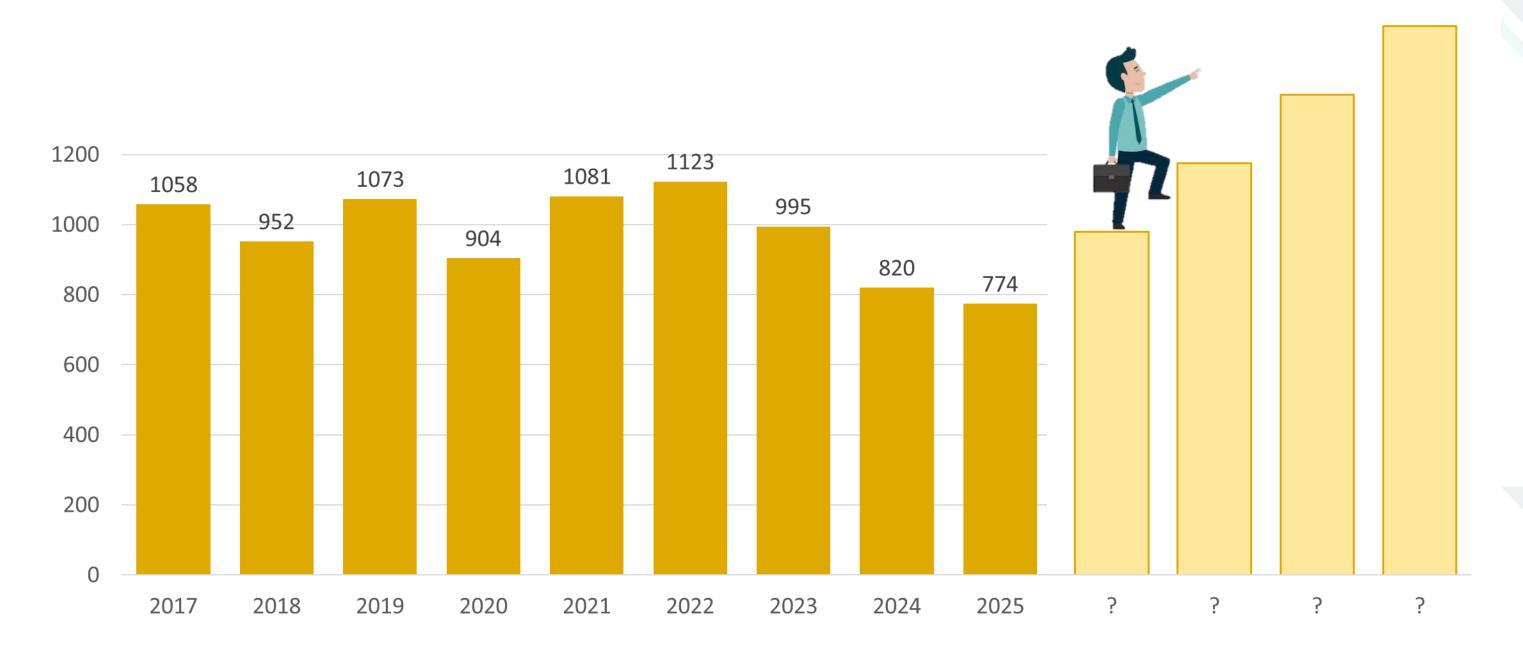






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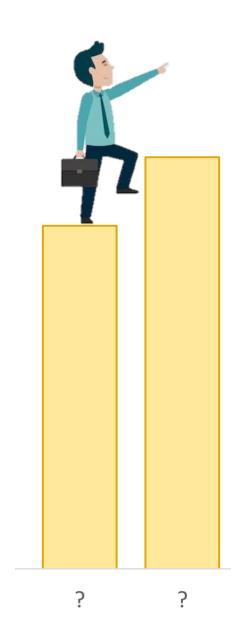


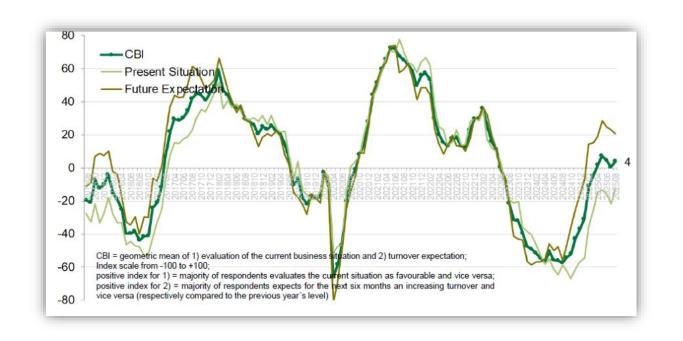


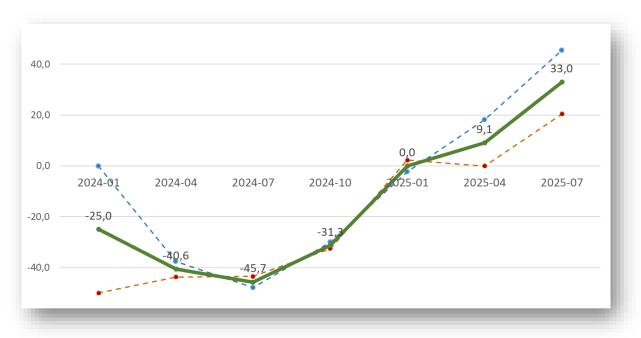


DEVELOPMENT OF THE AG TECH MARKET SHORT TERM VS. LONG TERM















DEVELOPMENT OF THE AG TECH MARKET
SHORT TERM VS LONG TO





LONG TERM

MANY

UNCERTAINTIES





CAP REFORM



- reduction in the budget for the common agricultural policy
- maximum direct payment of €100,000 per farm
- payments will be gradually reduced by 25–75% up to this amount
- the second pillar of the CAP will be canceled and merged with the Cohesion Funds







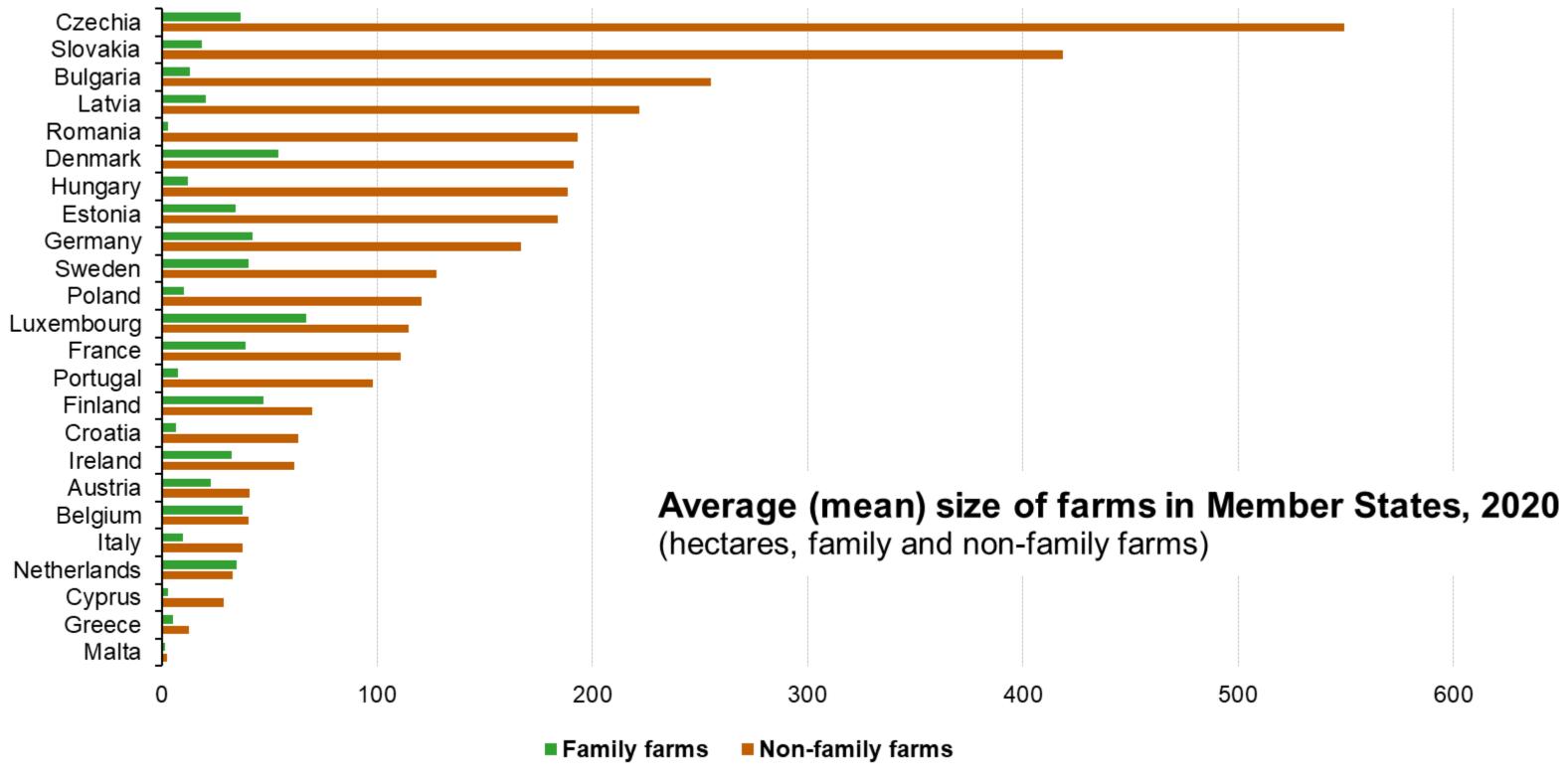
IMPACT OF THE PAYMENT CAPPING (100 000 EUR)





STRUCTURE OF CZ AGRICULTURE





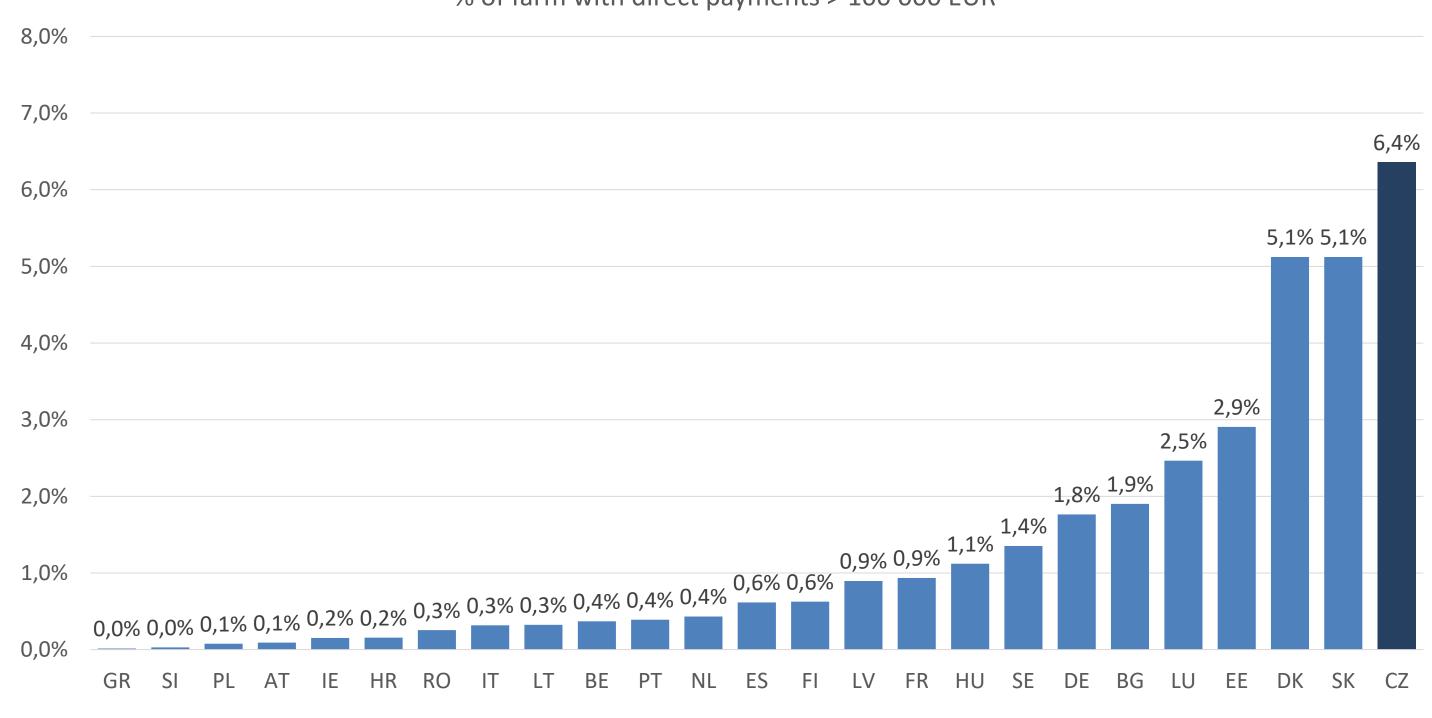




% OF FARMS AFFECTED BY PAYMENT CAPPING



% of farm with direct payments > 100 000 EUR



6,4 % biggest farmscultivate 45% ofthe arable land



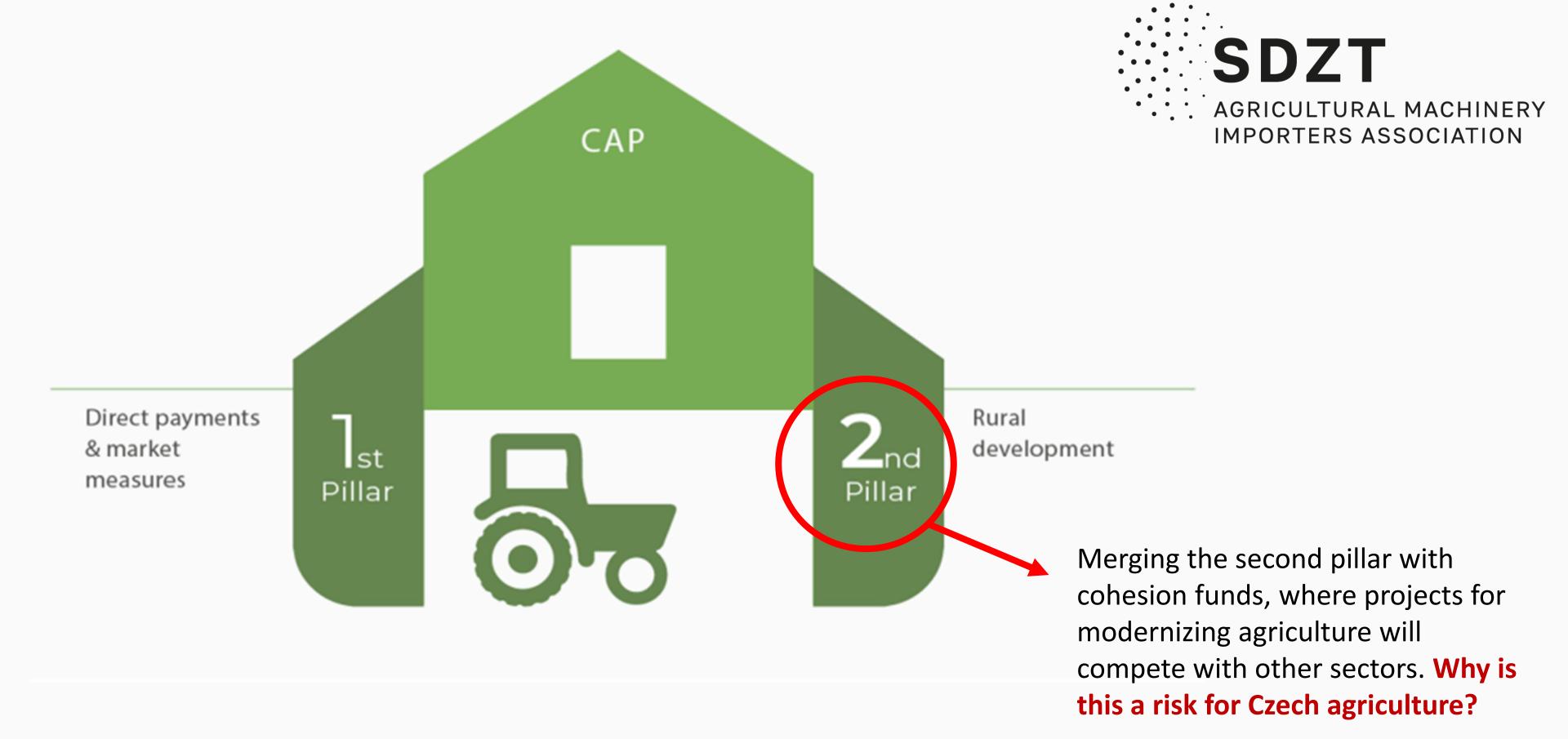




IMPACT OF THE CANCELLATION OF THE SECOND PILLAR











Share of industry in total gross value added (%)







IMPACT OF THE PRICE LEVEL OF AG MACHINERY

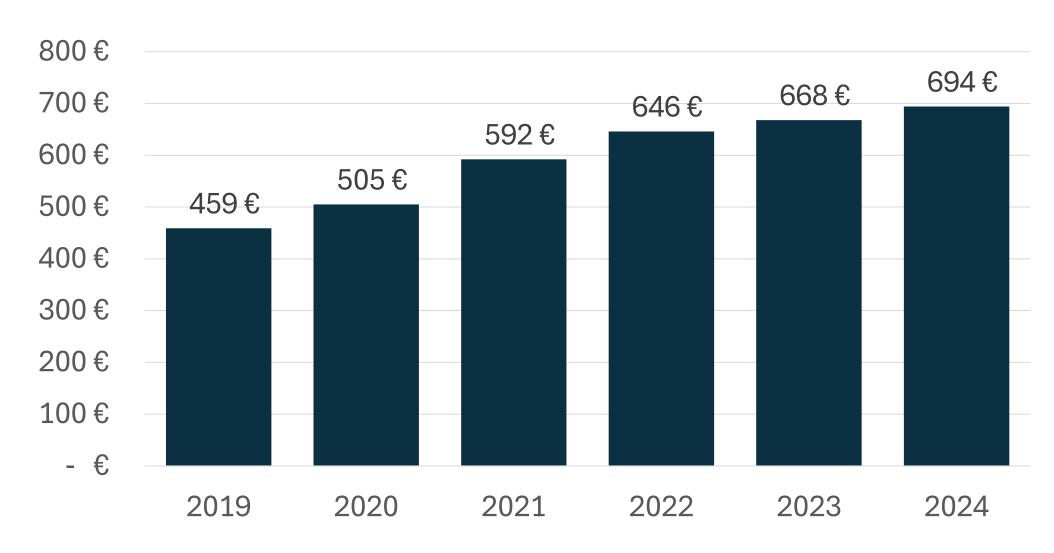




Average price per HP (new tractors)



+ 51 % over 5 years



Source: ANSEMAT





CONCLUSION



- The new rules of the EU's common agricultural policy will have a negative impact on the Czech Republic. Czech agriculture will be among the most affected in the EU, as large farms predominate.
- There is a risk that the government will redirect the money intended for the modernization of agricultural enterprises (second pillar) to other sectors. Agriculture does not have a strong position in the Czech Republic
- All this in a situation where we are already facing the reluctance of farmers to invest in new machinery, as their prices have risen dramatically in recent years





DENMARK









Denmark is now officially the first country in the world to implement a co2 tax on farming. From 2030 and fully implemented in 2035 the tax will be 100 EUR per ton with a 60% basic reduction.

15% of the arable area will be taken out of operation and converted into forest and wetlands. When the Danish state restrains the area mentioned there will be no compensation for the farmers besides a basic amount for planting trees. Fully implemented this will evidently push consolidation and structural development.

Taking 15% of the best arable land in the world out of operation seems crazy at a time where I don't know how many people die everyday from hunger and starvation. It doesn't make sense. Surely there must be a smarter way to move forward. This way we just make ourself poorer and India, China, Russia etc richer.









The farmers are under pressure due to the political situation and uncertainty. Therefore, most larger investments are on hold. And will be until we have the full overview in regards to the implementation and consequences of the CO2 tax.

The dealers are under considerable pressure – and we are in a perfect storm right now. They have way too much on stock after the covid-19 and are under pressure from the bank and seriously challenged on their cashflow.

The manufacturers are also under tremendous pressure and have way too much on stock and are pushing the dealers

So this of course also pushes the consolidation – but only on ownership level. The number of outlets remains stable.









But besides from that things are going well. Farmers have experienced political changes and regulations and structural changes through generations and when we get out on the other side it'll be the survival of the fittest.

The Danish organization is growing. Number of apprentices is growing, and we just won a silver medal at EuroSkills in Denmark.







The Association of Finnish Technical Traders

CLIMMAR – President's Report from Finland Learning from the Best Ideas





Training Campaigns, Vocational Education and Training

The challenges faced by all types of machinery are similar: new power systems, advanced combustion engines, hybrids, and new fuels. The underlying technologies are also the same: mechanics, hydraulics, pneumatics, electricity, positioning systems, and software.

We have been offering training for work machine fitters as a single program, no longer separating agricultural, forestry, earthmoving, or construction machinery. This also includes forklifts and telehandlers.

In spring, we will launch a pilot program focused on agricultural machinery maintenance. While it emphasizes agricultural machines, the training will provide a strong foundation for servicing all types of machinery. This reflects the reality on modern farms, where a growing variety of machines are in daily use.

Green Machines and Decarbonization

A new five-year initiative has begun in Finland: the Green Deal for Working Machinery. The aim is to reduce emissions from construction machinery, which currently accounts for 9% of emissions in the burden-sharing sector. Co-Operation with The Ministery of Environment Finland.

Collective Agreements

A new apprenticeship model has been launched to train future construction equipment mechanics. Ramirent Finland Oy, a construction equipment rental company, is participating in this pilot project, initiated by the Finnish Trade Union Confederation and the Service Sector Union PAM. The program offers students a pathway to complete a basic qualification in the automotive sector during 2025–2027. This pilot is now part of the national Collective Agreement. Its goals are to increase the sector's visibility and attractiveness to vocational students and to respond to the growing demand for technical expertise.



CLIMMAR CONGRESS 2025
Turin 16th-18th October

















Loi Duplomb

Agricultural regulation voted July 18th, 2025

- authorising « acetamipride » for special productions
- authorising larger use of water for irrigation

Censored by the Constitutional council August 7th







New President and board election

2025-2029



















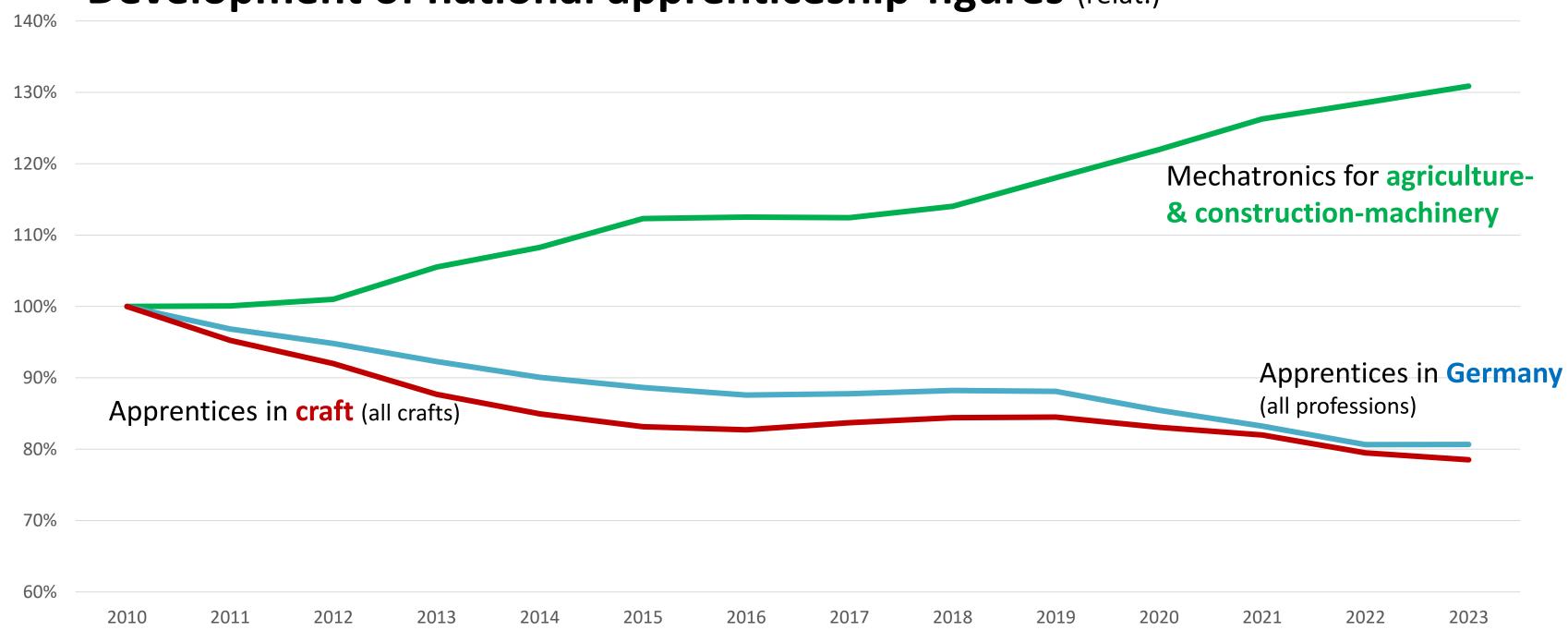


Greetings from Germany!

Karl Josef Duffner

President LandBauTechnik-Bundesverband

Development of national apprenticeship-figures (relat.)



Why is our profession that successful?

- broad-based training: lots of and modern technologies / future-branch / Pioneering industry in digitalization and remote diagnostics, AI applications and robotics
- lots of branches to serve: agriculture, construction, gardening, municipal, indoor, forklifts, etc.
- image & recruitment-campaign "starke Typen"
 - active since 2007
 - new and revised edition starts 2026



Retaining of our experienced employees – two aspects:

- 1. pension fund (for employees and their families)
- 2. development of a new career-path concept with
 - introduction of new continuing education qualifications
 - establishment of career monitoring and an integrated joint qualification network focus on:



Qualified Person for high-voltage in ag- & construction machinery: qualification for electrifying



Systemtechnician:

System experts for diagnosis and service



Servicemanager:

Professionals for service and management of several workshops

Qualified Person for high-voltage in ag- & construction machinery

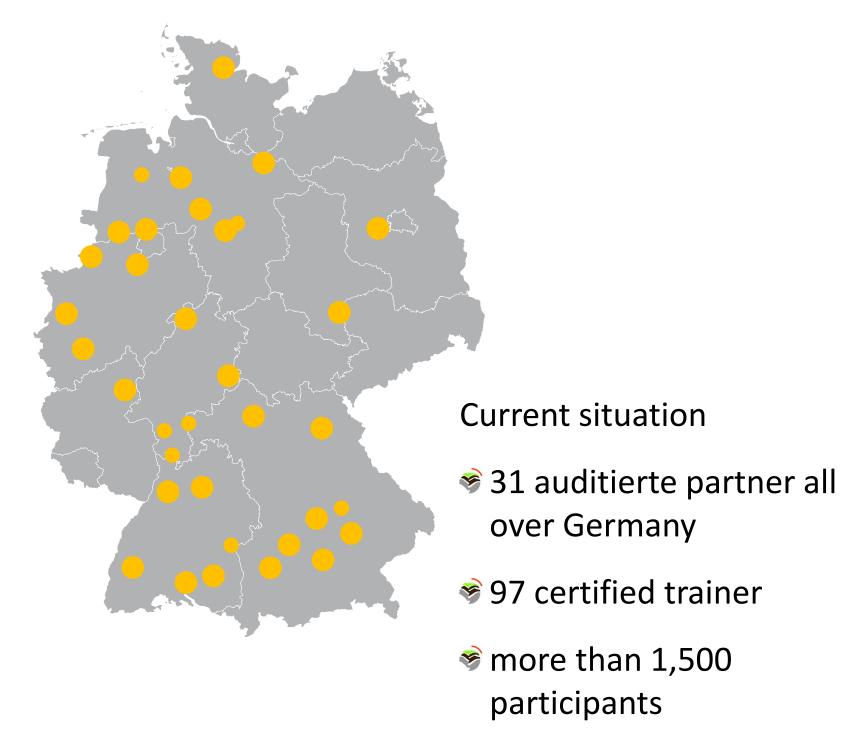
More high-voltage machines available – safety requirements and hazards differ from those in automotive technology

Workshop personnel must be qualified for this

A dedicated training concept has been developed with leading brands/manufacturers of our industry

A well-developed, practical, and legally compliant concept





Systemtechnician – spezialist for diagnosis (EQR 5)

- some kind of "link between journeyman and master"
- profile:
 - technical problem solvers on-site at customer's location
 - focus on diagnostics, modern technology, and digitalization
 - product specialist with in-depth technical expertise
 - high-level of personal responsibility and independence in the field
 - confident conflict management
- professional appearance brand ambassador in service
- we create experts with basic knowledgement, brand can expand on top (f.e. "Systemtechnician JD-tractors")



Service-Manager (EQR 6)

- interface between technology, customers, and management
- responsibility for processes, quality, and profitability of multiple workshops
- focus:
 - human resources management: leadership, motivation, communication
 - business administration and quality assurance: key performance indicators, organization, efficiency, quality
 - after-sales management: service, complaints, brand presence
 - occupational safety and health management: occupational health and safety
- first course just started



Current focus: basic training

- Agricultural and Construction Machinery Mechatronics Technician Training: Reorganization Process
- key points:

 - development of a key points paper
 - * intensive consultation and coordination within the social partnership
 - * aim: start of the official process in 2027













Many thanks for your audition

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President report of HUNGARY



October 16-18, 2025 Turin/Italy







Subjects

- Educational campaigns (vocational and adult training)
- >Government support programmes (financing/subsidies)
- >Commercial / supply chain disruptions
- **➢**Organizational news

October 16-18, 2025 Turin/Italy







Be an Agricultural Machinery Technician! – Career Promotion Programme and National Championship 2025



- > A highly successful nationwide programme running for 10 years to promote the profession of agricultural machinery technician
- Engaging secondary school students through school-based and online campaigns
- > Close cooperation with vocational training institutions and industry partners
- ➤ LETIA National Championship finals in spring, featuring professional and creative challenges









MEGFOSZ Academy – Talent Program in Vocational Education

MEGFOSZ

MEZŐGAZDASÁGI
ESZKÖZ- ÉS GÉPFORGALMAZÓK
ORSZÁGOS SZÖVETSÉGE

- ➤ Pilot programme launched in the 2024/2025 school year for 11th–12th grade agricultural machinery students
- ➤ Implemented in two vocational training institutions with a total of 32 selected participants
- > Written, oral, and practical assessments to measure progress
- > Supplementary learning materials on modern technologies provided by the MEGFOSZ Vocational Training Committee









MEGFOSZ – Accredited Vocational Instructor Training Programmes



- > This year's two main topics:
 - "Presentation of new technologies introduced in the development of tractors and agricultural machinery"
 - "Presentation and practical application of machines, equipment, and tools used in precision farming"
- > Strong professional interest, combining theoretical and practical training
- > Providing teachers with up-to-date professional information









Results, Challenges, and Next Steps in Vocational Education



- ➤ Main result: Growing interest in technical and mechanical professions
- > Challenge: Expanding the programme to include more schools
- ➤ Need: Further strengthening the cooperation between industry and education
- Future goal: Introducing digital and AR/VR-based practical training elements
- Following the success of the previous AR Learning Book, a new edition has been commissioned









Government Agricultural Support and Development Programmes 2023–2027 – Part 1



- ➤ Hungary is entitled to €13,571 million in agricultural support.*
- > 54% of the resources are allocated to rural development, and 46% to direct agricultural support
- ➤ Main objective: modernisation of agriculture and support for young farmers
- ➤ In 2024, more than €3,197 million* will be disbursed within the agricultural sector



(2025.10.10 € /Ft exchange rate 1€=391 Ft)







Government Agricultural Support and Development Programmes 2023–2027 – Part 2



- > Tenders relevant to members:
- ➤ Support for the renovation and development of livestock farms 2 calls for proposals
- > Development of biosecurity systems for various types of livestock facilities Irrigation development tenders
- Support for the development of grain cleaning, storage, drying, and seed processing facilities
- > Support payment processes have accelerated due to the upcoming elections





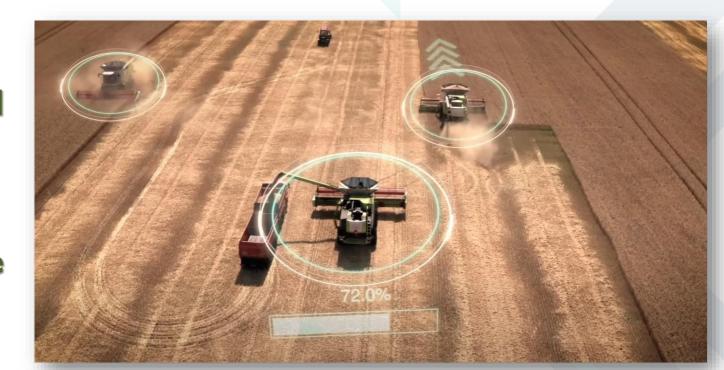




Impact of the Lack of Precision Farming Support on the Sector



- ➤ The precision farming tender planned for 2025 was cancelled due to the reallocation of funds.
- > This has adversely affected agricultural machinery dealers and technological developments.
- > The market for new machinery and digital systems has become subdued.
- As a result, the pace of innovation has slowed down, and the sector is now waiting for the next support opportunity.









Challenges in Supply Chains



These issues may negatively affect agricultural machinery distributors in Hungary:

- > Longer delivery times caused by temporary shortages of raw materials or spare parts
- > Reduced financing opportunities and declining crop prices
- > Rising prices and increasing supplier uncertainties
- > Lower-than-usual investment willingness among Hungarian farmers









Organization



Unfortunately, our two major national trade exhibitions did not take place this year.

- **Reasons:**
 - Negative market trends
 - The Mezőfalva exhibition was cancelled due to animal health restrictions.
- **MÉK**



- In September, we organized a smaller-scale yet successful exhibition.
- ➤ The merger preparation between MEGOSZ and MEGFOSZ is now in its final phase the unification of the two associations will result in a stronger, more efficient professional organization.









Thank you for your attention











President Report The Netherlands









Situation in the country and Industry



- Our governement has fallen on the 3th of June this year.
 It was only in function for one year. New elections are on the 29th of October.
- Big stand still in decision making on all kind of national policies like: climate change, energy transition, housing shortage, influx of Asylum seekers, healthcare, etc.
- This all has also its effect on the Industry. Still lots of uncertainty about filles like Nitrogen reduction, Manure plans, etc.
- On the other hand, developments are still going on, like:
 - growing interest into autonomous machinery/ robotization > smart farming.
 - Electrification of (big/bigger) machinery
- Overall problem: finding the right technical qualified personel.



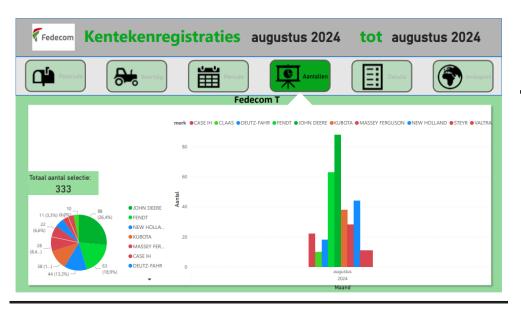
















Situation in the Association



In general the focus of Fedecom is on

- Creating higher memberparticipation by bringing added value activities and tools. Some of these activities, members have to pay extra
- Creating more visibility as relevant stakeholder towards government

Several activities and initiatives are taken:

- Special training courses on:
 - Electrification of machines
 - Cost calculation
 - How to keep your personel
- Development of several digital tools, such as:
 - Fedecom Barometer (every half year)
 - Registration of machinery tool
 - Al tool for students and other employees
- Particiation in economic trade missions based on innovations with several countries (Poland and France)
- Distributor of a government subsidy of 77 mil. for autonomous / zero emission machinery







Education activities and initiatives













In the field of Education, Fedecom is very active with its TIM initiative. Everything is focused on promoting the influx of new technical talent into the sector. Various activities are being implemented to this end:

- Training focused on staff recruitment and retention
- Promotion at trade fairs
- Participation in Skills competitions









Education campaigns (Vocational Education & Training)

In Poland in 2025, there are 64 Agricultural Education Centers (ZSCKR), which form the Network of Agricultural Schools supervised by the Minister of Agriculture and Rural Development. The total number of schools is approximately 250. This includes institutions offering programs such as agricultural technician, agricultural mechanization technician, and agribusiness technician.

PIGMiUR actively participates in promoting and developing education in the field of agricultural mechanization by organizing training sessions for teachers, national competitions for school and university students aimed at promoting the profession, which will contribute to a highly qualified workforce in the future. PIGMiUR is also a partner of the WorldSkills program (Erasmus+) in the "agricultural and construction machinery mechanic" category, with representatives under PIGMiUR's patronage representing Poland on the international stage.

PIGMiUR is preparing to distribute educational materials and exercise books in cooperation with the Polish Ministry of Education and the Ministry of Agriculture and Rural Development. These resources have the potential to enhance the competencies of both future professionals and teaching Staff.











Government support programs (finance/subsidies)

Agriculture Budget and Subsidies in Poland (2025)

- €18.5 billion allocated to agriculture in the 2025 national budget (including KRUS "Agricultural Social Insurance Fund", agricultural markets, and rural development)
- €4.2 billion in direct payments for 2024
- €435 million for grain surplus buyouts and export subsidies
- €361,000 in fuel subsidies for farmers

KPO and Investments "National Recovery Plan"

- €6.3 billion from the National Recovery Plan (KPO) for agriculture, including:
- €1.4 billion for modernization, Agriculture 4.0, and climate protection
- Support for shortening supply chains and agritech innovation

Farmer Support Programs

- Young Farmer Bonus (2025) for machinery purchases and farm development
- Investment grants (CAP "Common Agricultural Policy" 2023–2027) focused on soil, water, biodiversity, and living conditions
- WFOŚiGW "Voivodeship Fund for Environmental Protection and Water Management" subsidies for liming acidic soils

Planned Changes

- From 2026, subsidies will be granted only to active agricultural producers
- Farms will undergo verification of actual agricultural activity











Trade/supply chain disruptions.

Border Blockades with Ukraine (2024)

Period: Since November 2024. Locations: Medyka, Dorohusk, Hrebenne, Korczowa, Zosin

Reason for Protests: Influx of cheap agricultural products from Ukraine. Lack of enforcement of government agreements on embargo and trade regulations. **Consequences:** Disruptions in the export of Polish grain. Delays in deliveries of components and machinery. Up to 70% reduction in goods flow in some region.

Border Closure with Belarus (September 2025)

Reason: Decision by the Polish government in response to the "Zapad-2025" military exercises. Preventive measure against potential geopolitical threats. **Impact on Transport and Trade:** Suspension of transit from China to Europe via the "Silk Road". 250,000–300,000 shipments rerouted. Estimated transport losses: €100–200 milion. Truck downtime cost: €500–700 per day.

Key Issues for Agriculture and Trade Sectors.

Dealers:

- delays in parts deliveries,
- rising operational costs,
- currency exchange rate volatility affecting import prices.

Farmers:

- limited access to fertilizers and production inputs,
- difficulty selling domestic agricultural products.









Slovakia – President's Report



AGRION - Slovak Association of Agricultural Technology Suppliers

Peter Matejovič The President







Education (VET)

field Agromechatronik.

- AGRION published a new textbook Agromechatronics, created together with Prof. Findura and Polish partners.
 It is primarily intended for vocational school students in the study
- The Slovak University of Agriculture (SPU) in Nitra is preparing an Innovative
 Center of Agricultural Machinery in its campus.
 AGRION is expected to have dedicated office space there and will use the
 center for technology demonstrations and training activities.
- The center will provide opportunities for students and teachers from SPU, as well as for teachers and students of vocational schools.
- Planned opening: Q1 2026.











AgroSkills Competition



ZDRUŽENIE DODÁVATEĽOV PÔDOHOSPODÁRSKEJ TECHNIKY V SR

AGRION organized the AgroSkills competition during the Agrokomplex exhibition.

The contest is dedicated to vocational school students in agromechatronics.

 The goal is to promote vocational education, showcase schools and students,

and use the country's largest exhibition as a platform to connect schools with employers.









Exhibitions Strategy

- AGRION is working on optimizing the exhibition calendar to avoid too many small events.
- Concept: one major exhibition per year.
- Year 1: Agrokomplex merged with Agrosalón.
- Year 2: strong national presence at the National Field Days.
- This strategy helps concentrate exhibitors and visitors, making each exhibition more attractive and impactful.











Field Days

- AGRION continues to organize its own field days.
- In 2025, the Spring Forage Field Day was cancelled due to the outbreak of foot-and-mouth disease.
- In September, the Maize and Autumn Works Field Day took place in Eastern Slovakia.
- Attendance was lower, mainly due to weather, harvest timing, and changing locations.
- AGRION is working on stabilizing locations and making the events more attractive for visitors.















Market Situation



- At the beginning of 2025, a planned subsidy call was cancelled, which created uncertainty in the sector.
- Fortunately, two older measures were reopened with increased funding.
- This resulted in record machinery sales in the first half of 2025, as all deliveries had to be completed by June.
- For the second half of the year, a slowdown is expected, so the overall year will likely end with average results.





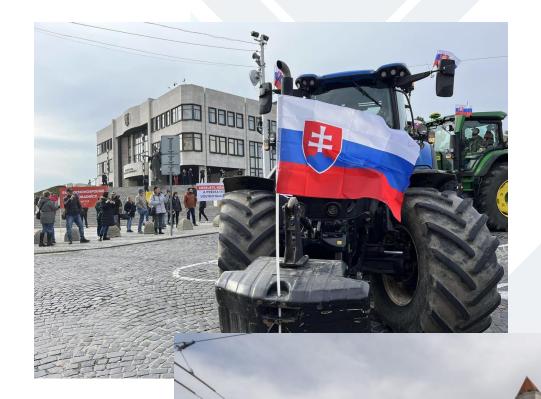




Farmers' protests / supply chain

- Farmers in Slovakia, like in many EU countries, protested against bureaucracy and administrative burdens.
- In reality, many difficulties stem from national over-implementation of EU rules, which makes procedures more complex than required.
- Unfortunately, this is not always communicated clearly, so public debate often blames Brussels only.
- Despite these challenges, the supply chain for agricultural machinery has remained stable.













Thank you for your attention.



























Secure your future – become a service technician!

There is a shortage of service technicians in Sweden. Choose an education that guarantees employment, freedom, and personal growth. Take the opportunity – the machinery industry needs you!















President's Report from Switzerland

Werner Berger – Agrotec Suisse 17th October 2025









Education campaigns: SwissSkills













Education campaigns: SwissSkills





More than **150** professions

120'000 visitors from all linguistic regions of Switzerland

1'100 competitors

110'000 m² area (16 football-fields)







Vocational and Professional Education and Training fund



Definition:

- A **Vocational and Professional Education and Training (VET) Fund** (in German: *Berufsbildungsfonds, BBF*) is a **solidarity-based financing mechanism** for vocational training in Switzerland.
- It ensures that all companies in an economic sector contribute fairly to the costs of vocational training, including those that do not directly train apprentices and are not members of the branch association.

How It Works:

- 1. Branch association create and manage a VET Fund. The ministry declares the fund to be binding for all businesses (like a law).
- 2. All companies in the sector contribute to the fund (legally binding).
- 3. The money is used to promote and support VET activities, such as the development of learning materials, the promotion of vocational training like SwissSkills etc.
- 4. The system guarantees shared responsibility and equal opportunities in vocational training.







