



Work in Progress

Presidents Report 2014

Pride

Ventourus

Ambition

Expertise



Market Developments 2014

- Slight national economic recovery after period of crisis 2008-2012; growth 2014 ~ 1%
- In Agro&Food:
 - Increase of volumes (almost all sectors, especially dairy sector)
 - Decrease prices of commodities (all products)
 - Russian-Ukrain contraction: sharpens EU price-erosion agroproducts, especially vegetables, fruit, dairy
 - Farmers face fall back of incomes: decrease investments machinery in almost any sector



Market Developments 2014

- In machinery services:
 - Pressure on sales of tractors, machinery in agro
 - Slight growth in machinery for industry, green and parks
 - Export machinery still going on successfully (growth)
 - Market used machinery: strong pressure



Country report from The Netherlands

Sales agricultural tractors

<i>2011</i>	<i>2012</i>	<i>2013</i>		<i>2013 jan.-aug.</i>	<i>2014 jan.-aug.</i>
3397	3294	3124		2036	1973



Country report from The Netherlands

Sales compact tractors (0 – 45 kW)

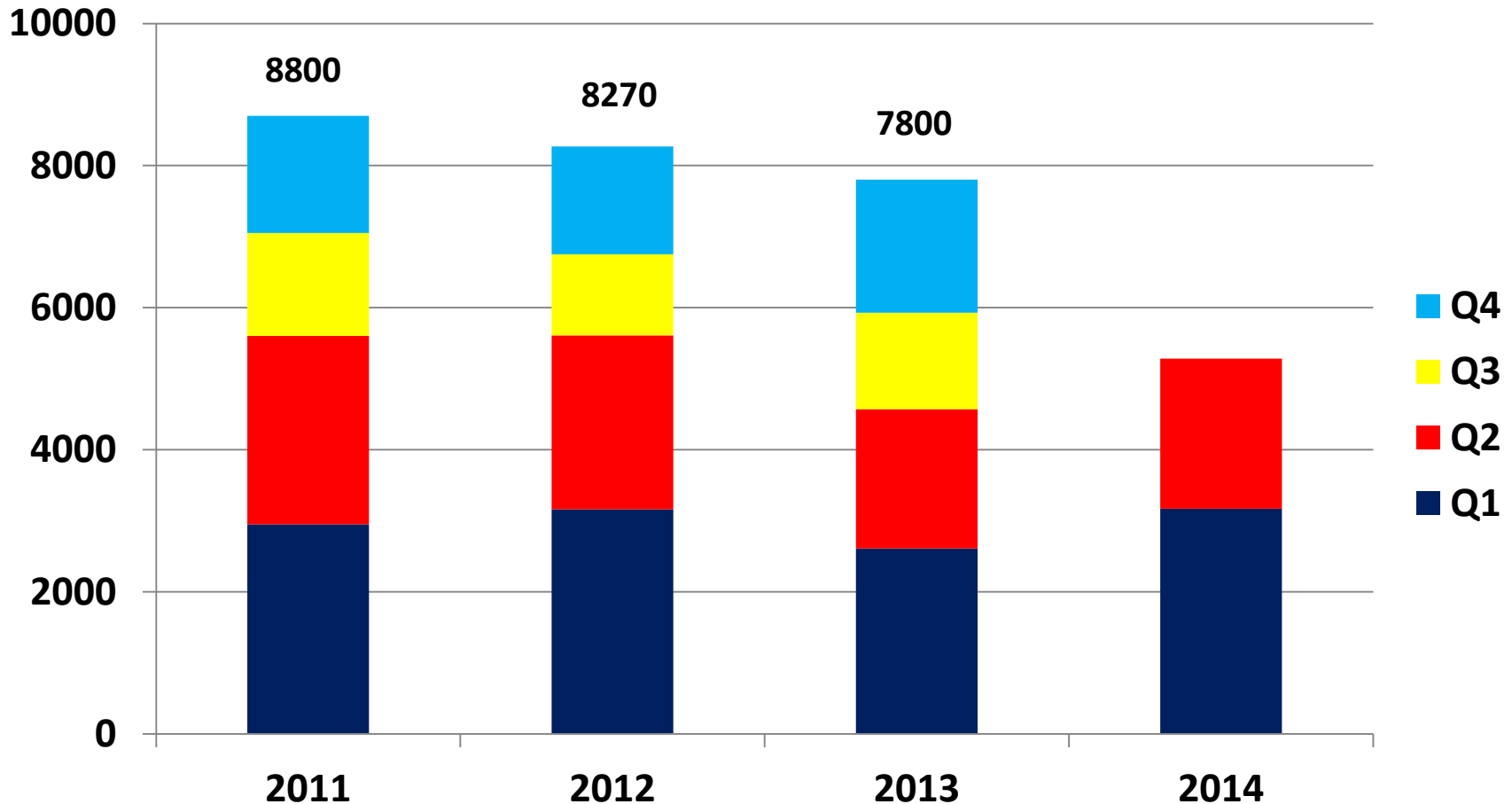
<i>2011</i>	<i>2012</i>	<i>2013</i>		<i>2013 jan.-aug.</i>	<i>2014 jan.-aug.</i>
672	475	604		431	376



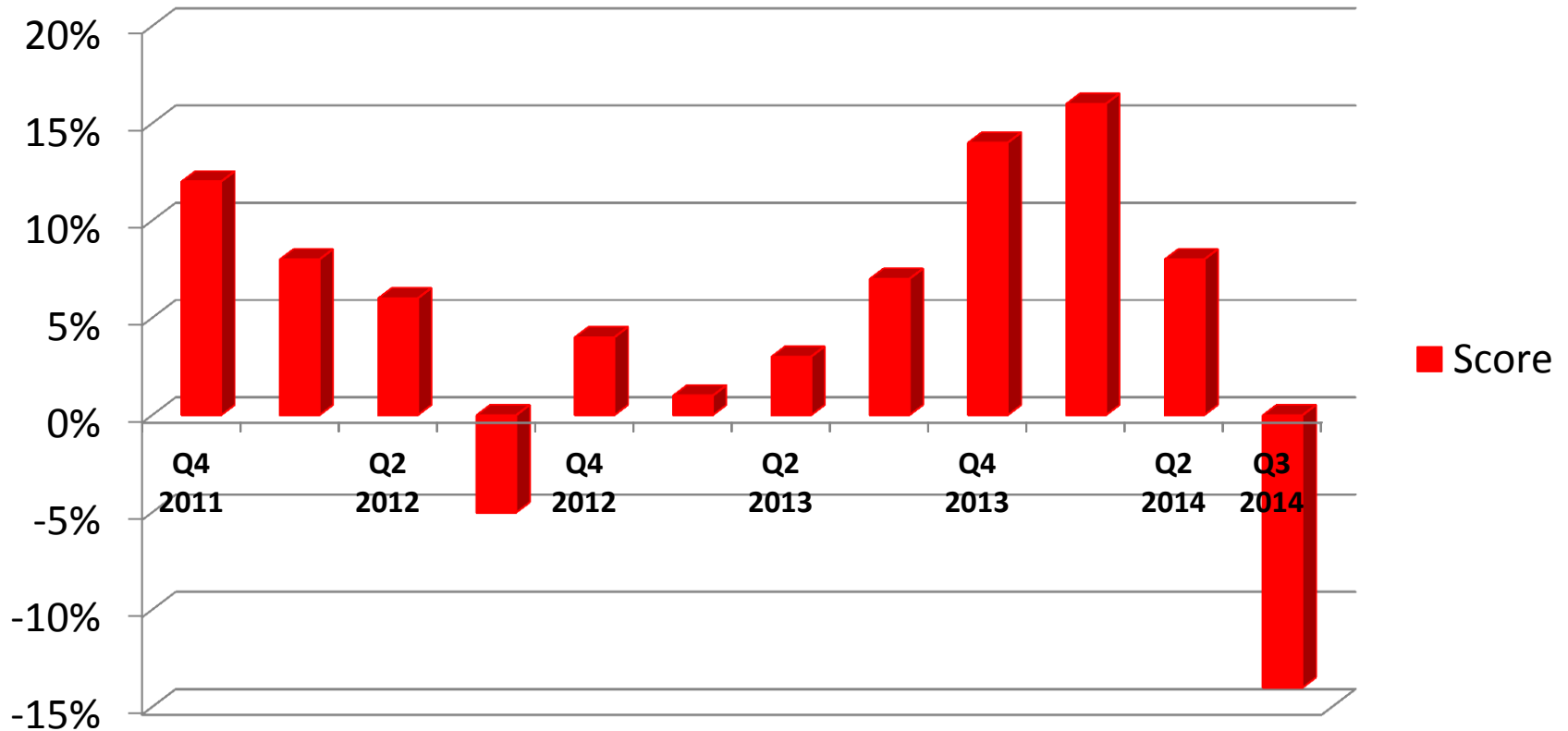


Fedecom Country report from the Netherlands

Trendanalysis of Sales Implements/Machinery



Economic barometer machinery dealers



Economic barometer machinery dealers

Negative trend latest quarter(s) based on

- development product prices
- dairy farmers anticipate on a liberal milk market, and invest(ed) in housing, milking equipment and manure processing
- Negative investment climate





Fedecom Evolution Branch Structure

- Return on Investment dealers: average 0-1%
- Number of Dealers relatively stable: 750
- A tendency towards upscaling of official dealers of the big producers/brands
 - Concentration towards 6-12 national dealers
 - Subdealership (temporarily?) possible
- A tendency towards specialisation on specific brands or products
- Separation agro-, green- and industry- dealers
- The role of importers is redefined
- Growing open vacancies of technical jobs





Fedecom

Program Fedecom 2014

- Focus on 5 spear points:
 - Education,
 - Multi-annual Policy,
 - Certification (COM Inspection),
 - Market Information,
 - Internationalisation
- And maintenance of 2 important themes:
 - Registration of agro-machinery/safety in traffic
 - Trade fair ATH / GTH



Progress spearpoints

(Standing as of October 2014)

Speerpunten	Actueel	Plan
1. Education	● ● ● ●	Pilot PTC+ class and plan Fedecom Academy
2. Certification and inspection	●	Definition new goals
3. Market Information	● ●	<i>Start up projectteam</i>
4. Internationalisation	● ●	<i>CEMA working group livestock starting, exchange Fedagrim, CLIMMAR and CEMA</i>
5. Multi-annual Policy Plan	● ● ●	Starting document available, round table groups with members



Progress themes

(Standing as of October 2014)

Actual themes	Actual	Result
1. Traffic Security and Registration	● ● ●	Joint viewpoint LTO, Cumela
2. Trade Fair ATH 2014	● ● ● ●	Succesful 55.000 visitors
4. Service contracts Milking Machinery	● ● ●	Checklist available, implementation started
5. Ambitious Entrepreneurship	● ● ●	13 Entrepreneurs made and discuss Business Plan
6. Annual Meeting 20 november	● ●	Discuss MPP
7. Membership and membership fee scheme	● ●	Decision on Members Council November 6th



Points of attention

- Members involvement
- Capacity of working force and volunteers
- Communication officers function
- Development Fedecom Academy asks a lot of clever management and directors thinking and acting
- Number of members quite stable and for short term sound P/L and balance sheet





Thank you for your attention

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