

CLIMMAR Branch Report

presented by Workshop 2: Data and Surveys



Chairman: Ulf Kopplin, Vicepresident CLIMMAR

CLIMMAR Congress, 15-17 October 2015,
Stockholm, Sweden



Goal:

There are market statistics for all members, with 75% of the members actively participating in 2015

Result:

Increase of participants in existing market statistics up to 90% of the members.

Development and provision of information and monitor on new market statistics that meet requests and expectations.

Project team:

Germany, Sweden, Austria, Hungary
under supervision of Vice- President Ulf Kopplin



Status Activities:

7-1-2015, Würzburg (D):

Meeting of the working group during the LTU conference

evaluation: current Climmar models or new ones?

result: new 4 proposals named “CLIMMAR-Branch-Report” with subnames:

- markets & structures (branch view)
- trends (current branch situation whole countries)
- companies averages (similar dealers view)
- warranty conditions

Aim: make all members able to join all surveys and to grow year by year.

WG2 expects the CLIMMAR-members some kind of “change in daily work” to participate: participation is no longer a will, it's a need, a duty



Status Activities:

8-4-2015, Utrechts (NL):

proposals are discussed and decided to act like suggested

spring/summer 2015:

Members fulfilled and sent their answers (but fragmentarily, some didn't at all); WG2-members remembered monthly, later weekly

14-10-2015:

WG2 discusses the results due to their quality and completeness, points out the results for the congress and decides about further steps; it has also to decide about external input of branch-statistics-experts



Results:

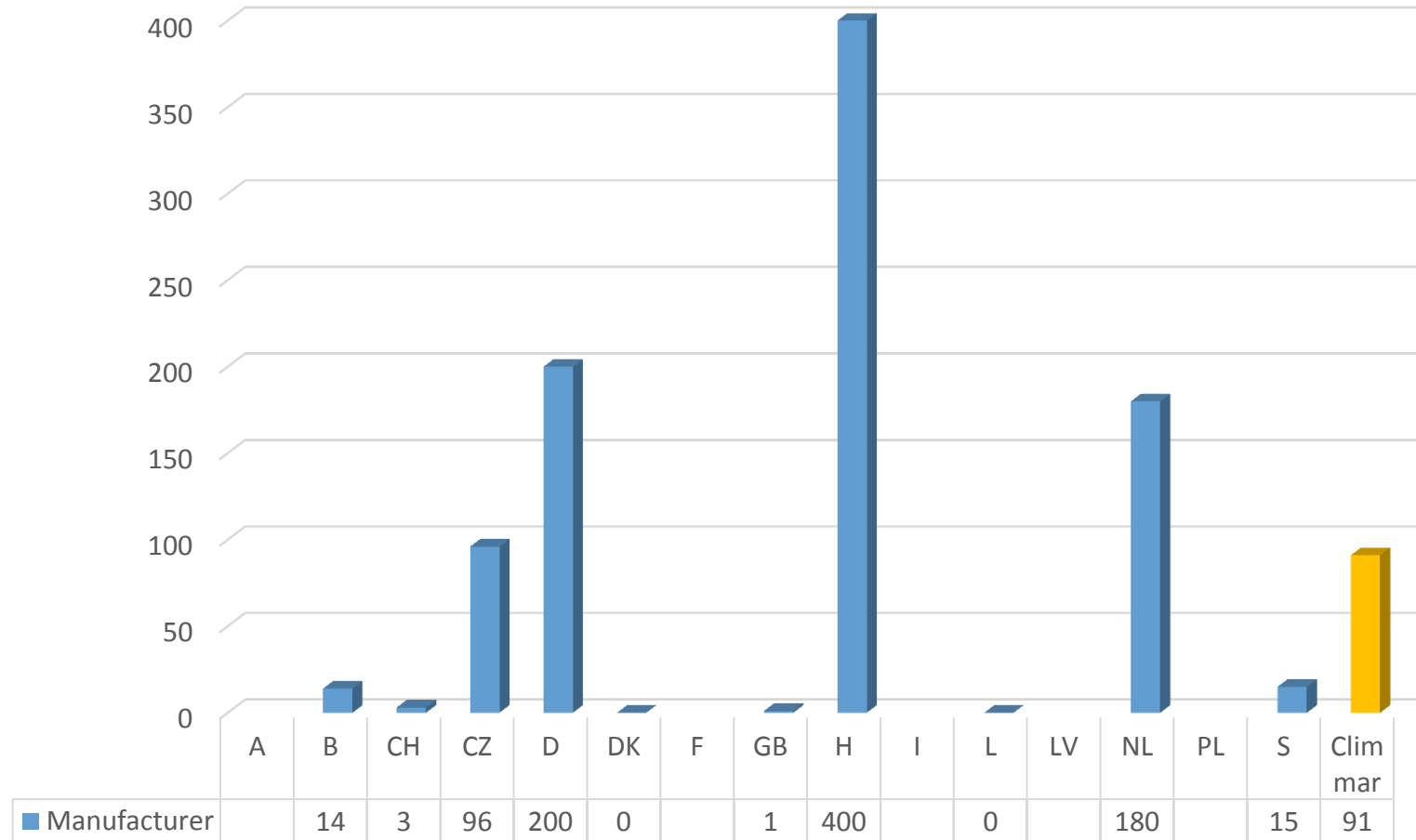
What are the “CLIMMAR-Branch-Report”-results:

- National branch view - **markets & structures**
- National Branch view - current situation: **trends**
- Dealers view - **companies averages**
- Dealers view - **warranty conditions**



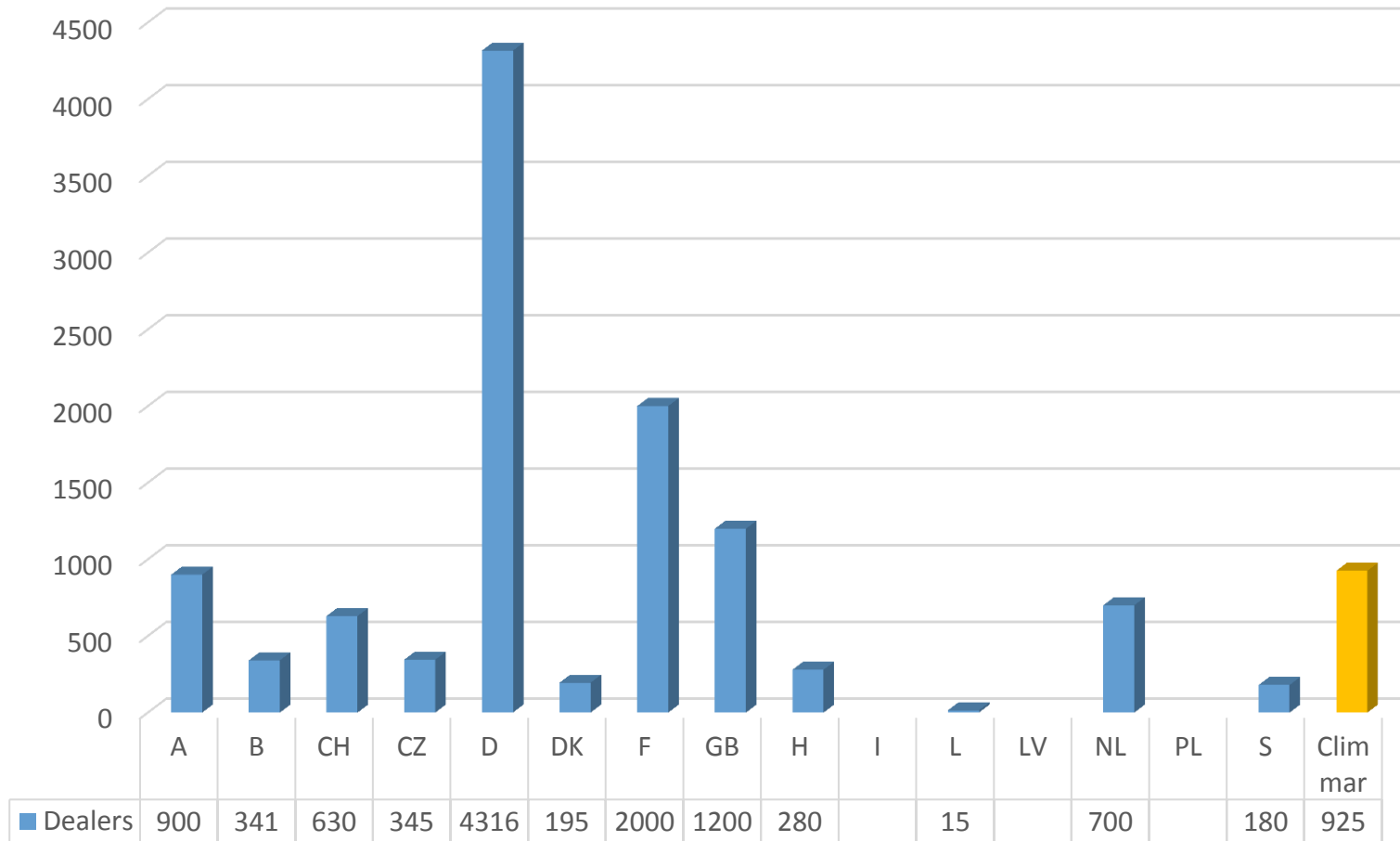
National Markets and Structures:

Manufacturers



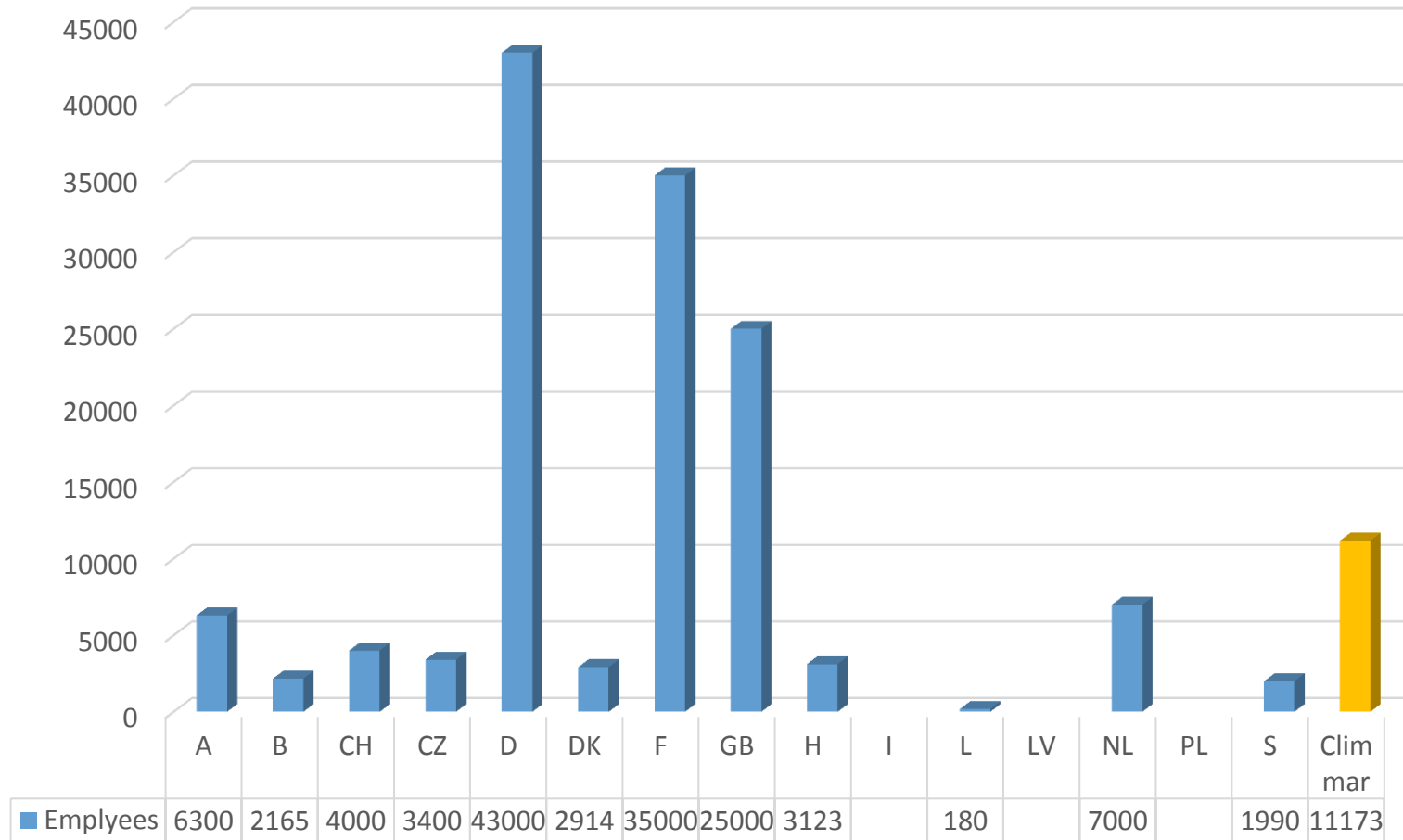


National Markets and Structures: Dealers (incl. satellites) & Servicemen





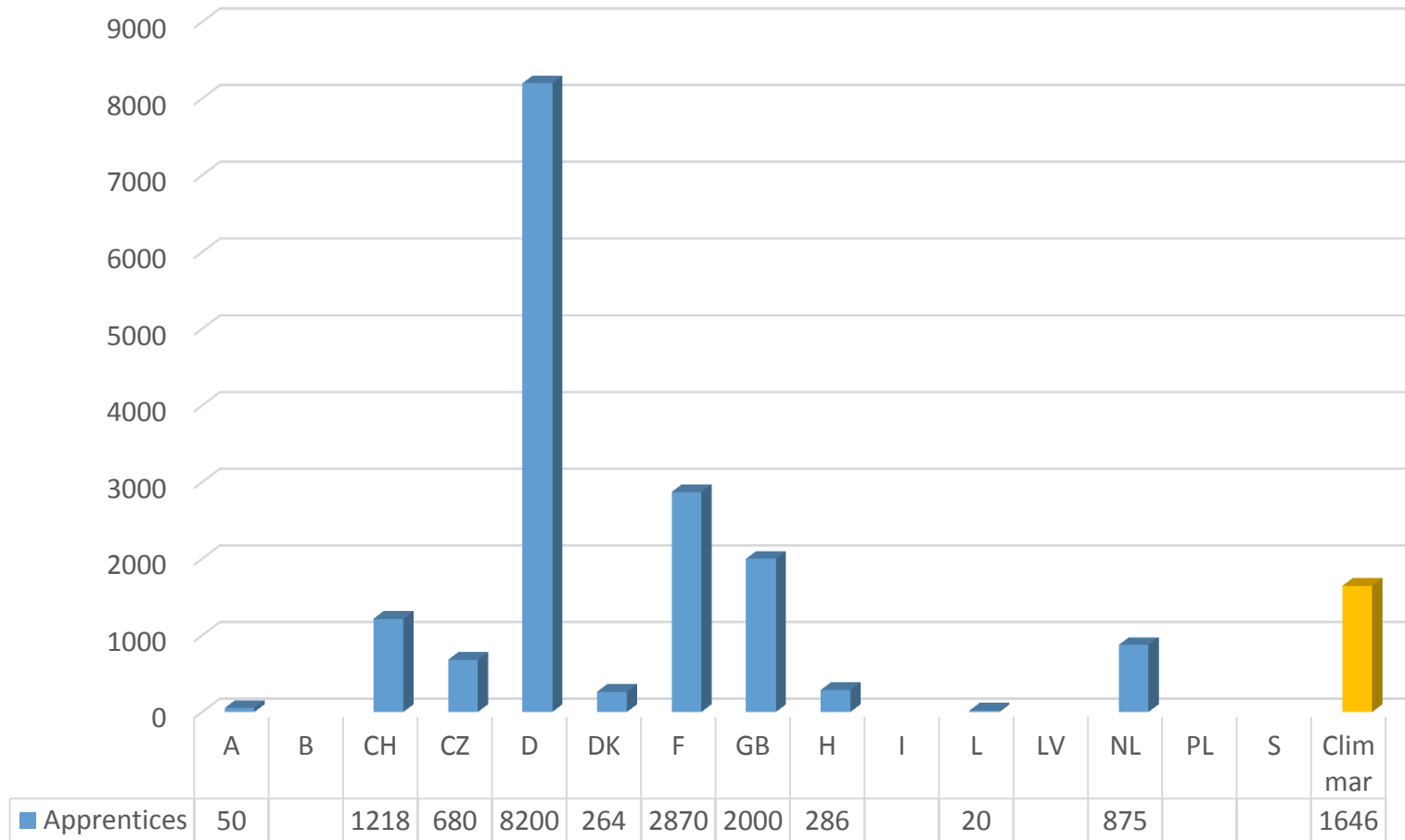
National Markets and Structures: Employees





National Markets and Structures:

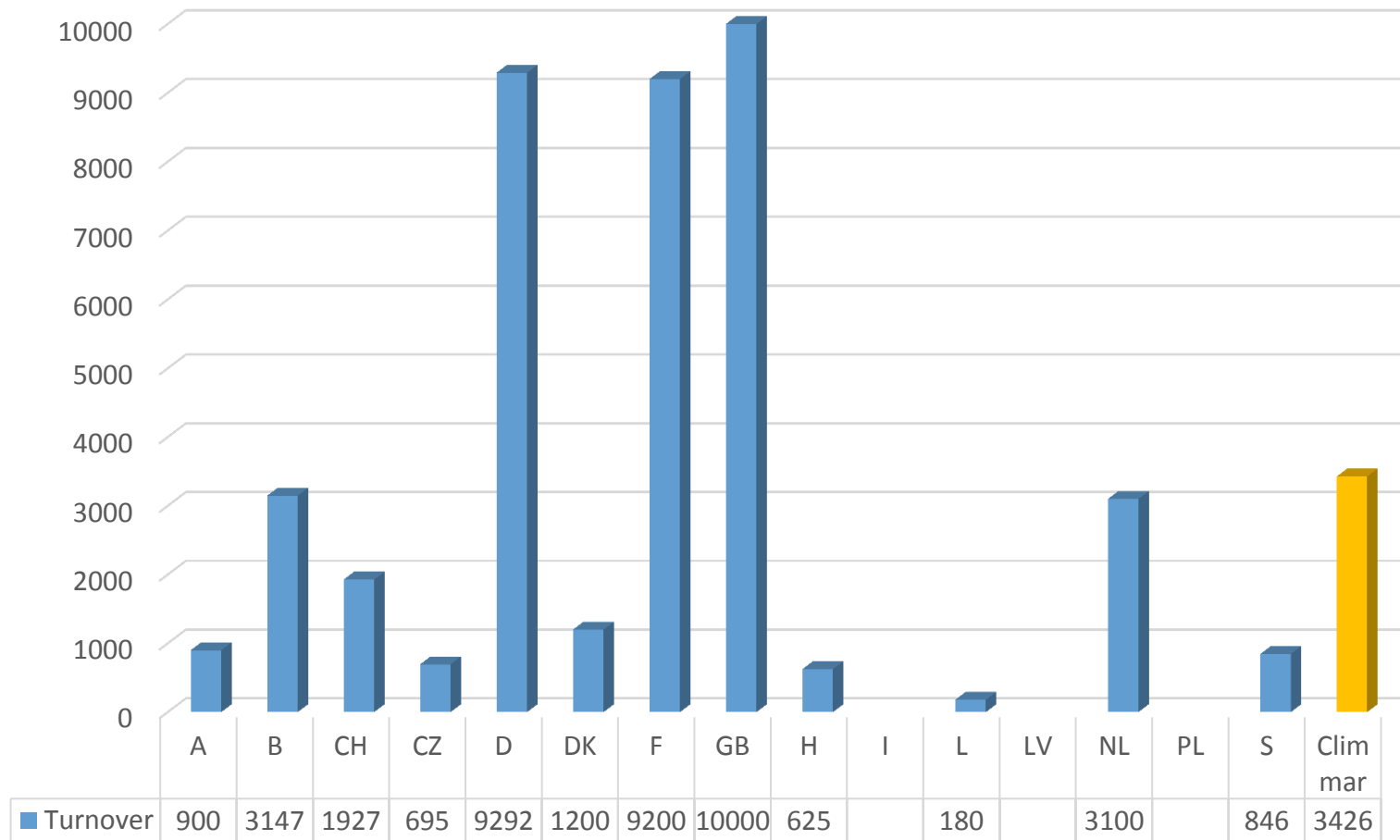
Apprentices





National Markets and Structures:

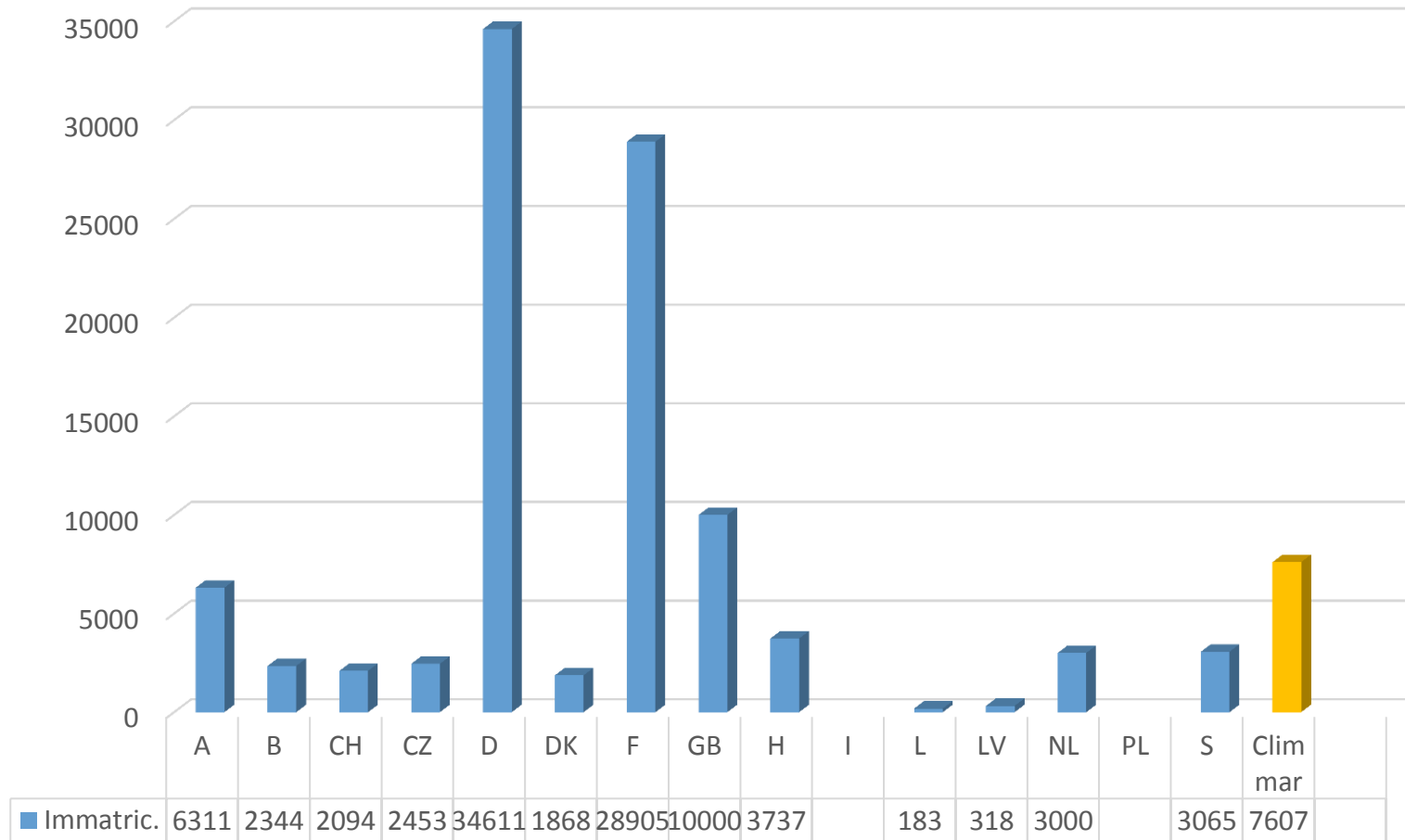
Turnover (in 1000 €)





National Markets and Structures:

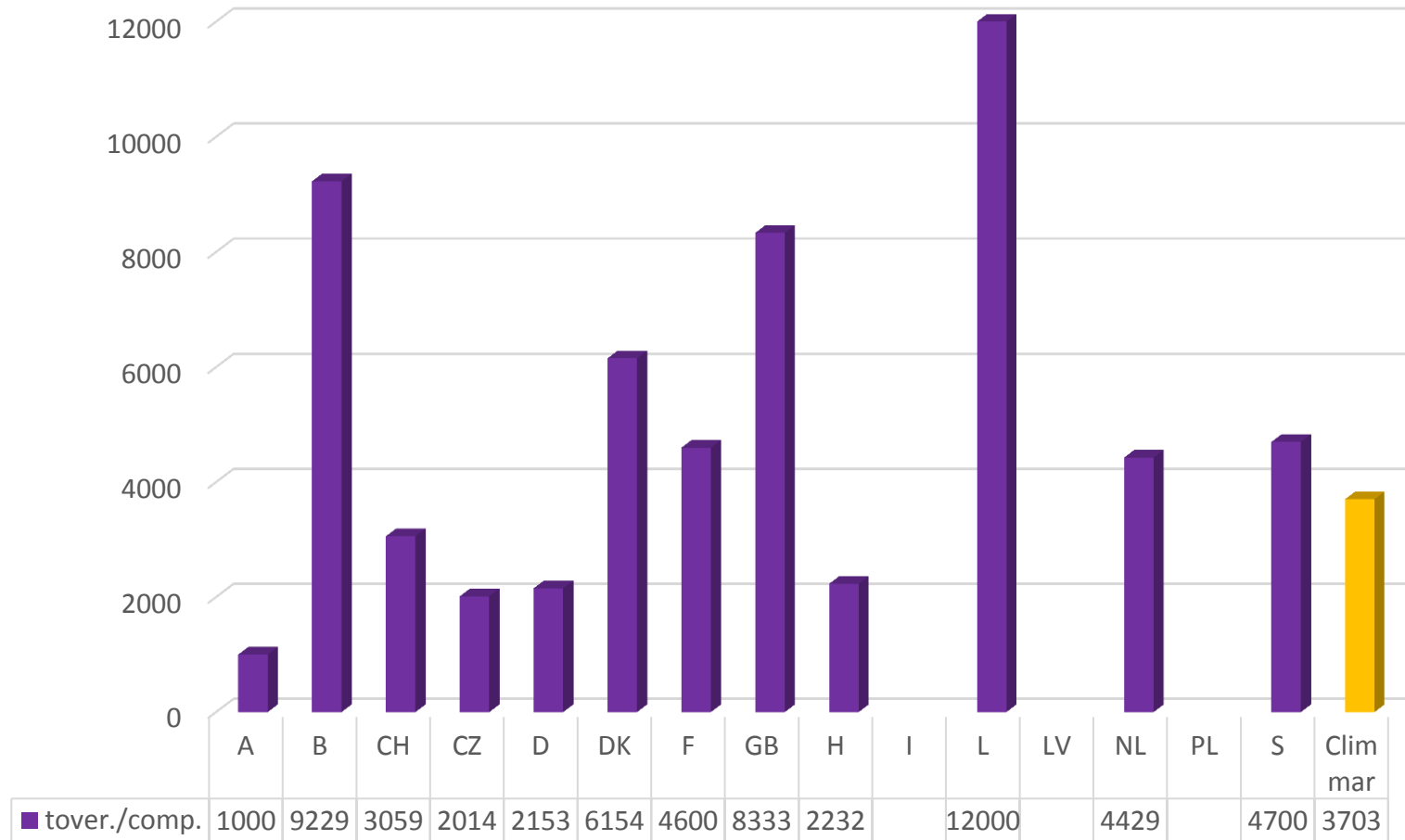
Tractor immatriculations





National Markets and Structures:

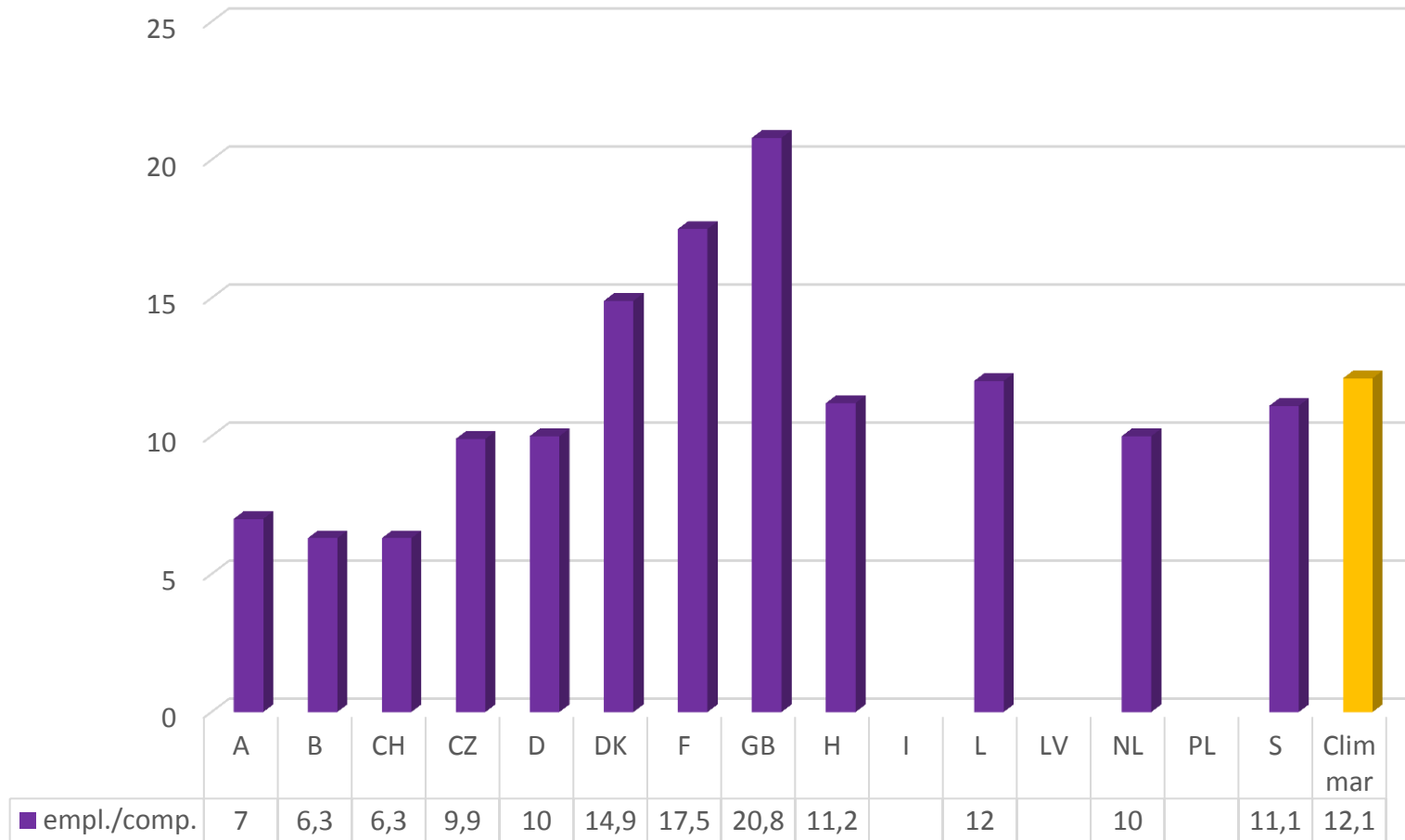
relations: Turnover per Company





National Markets and Structures:

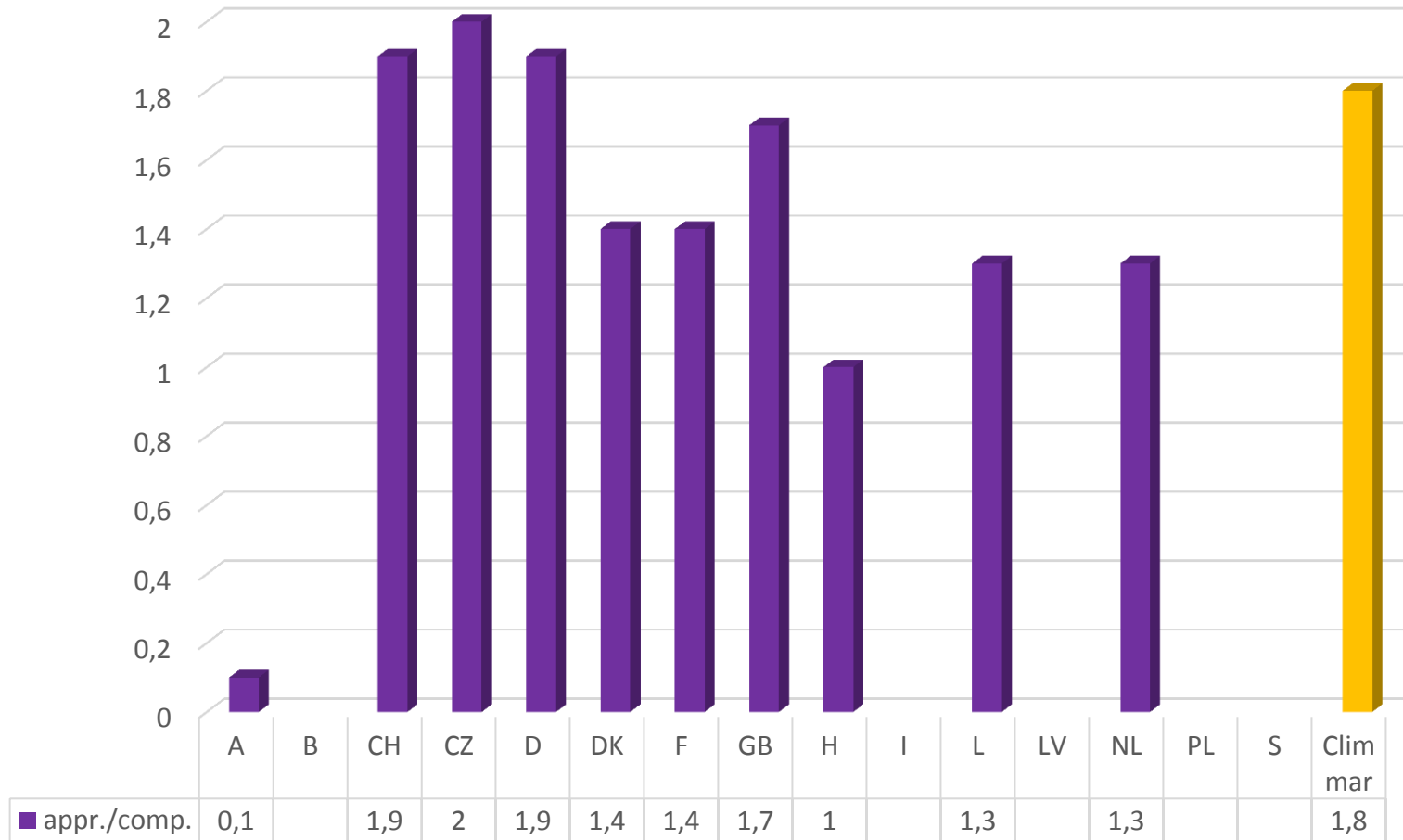
relations: Employees per Company





National Markets and Structures:

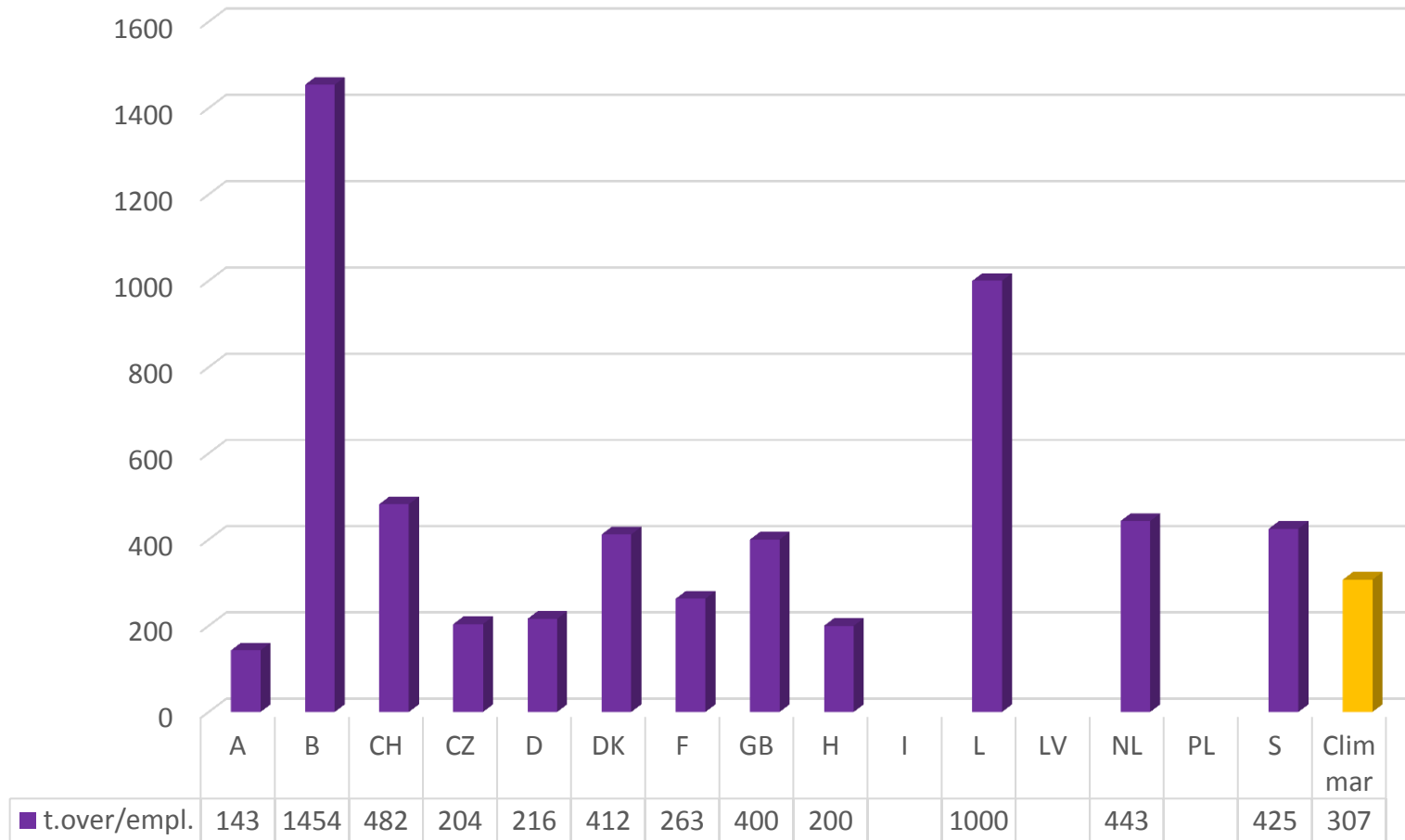
relations: Apprentices per Company





National Markets and Structures:

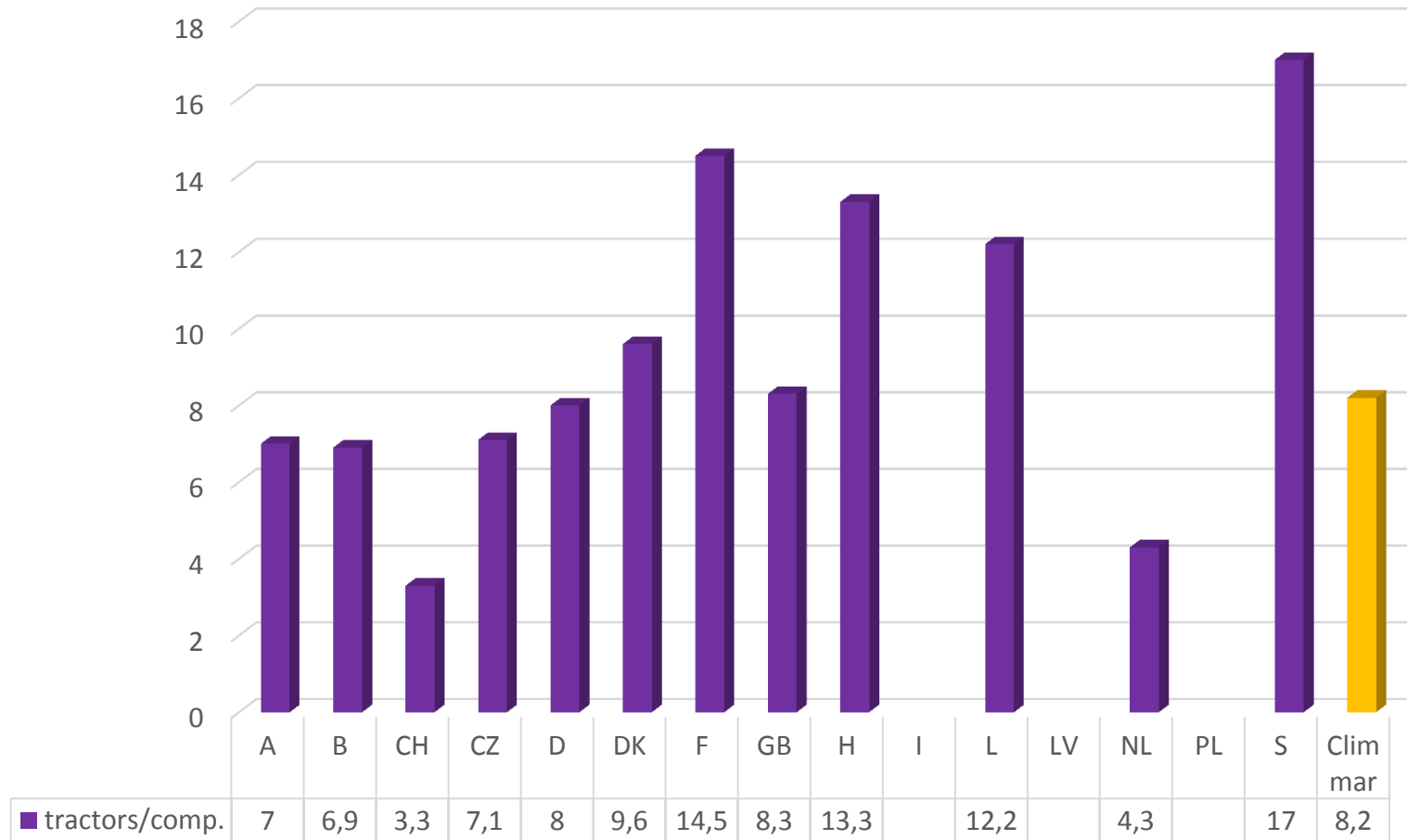
relations: Turnover per Employee





National Markets and Structures:

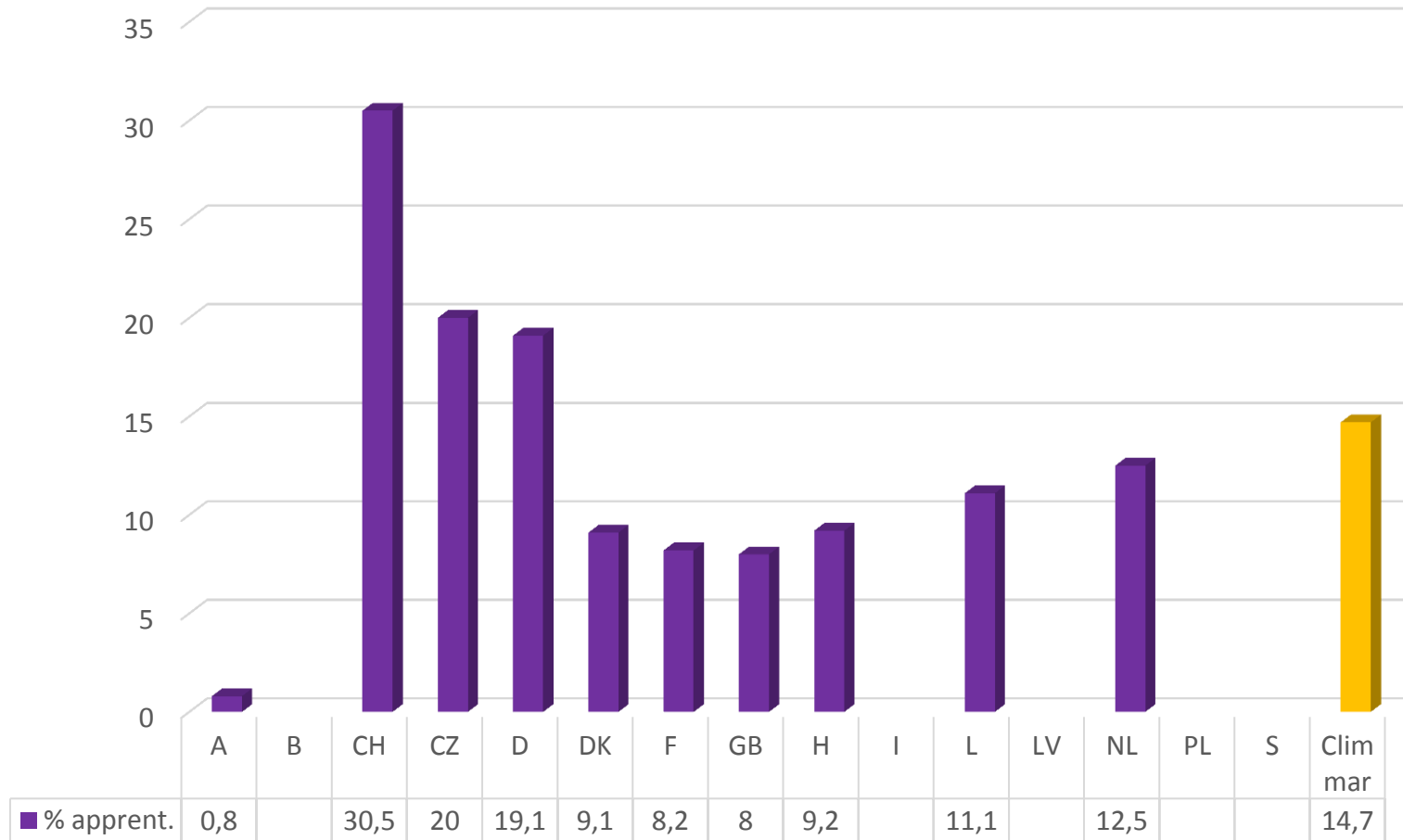
relations: Tractors per Company





National Markets and Structures:

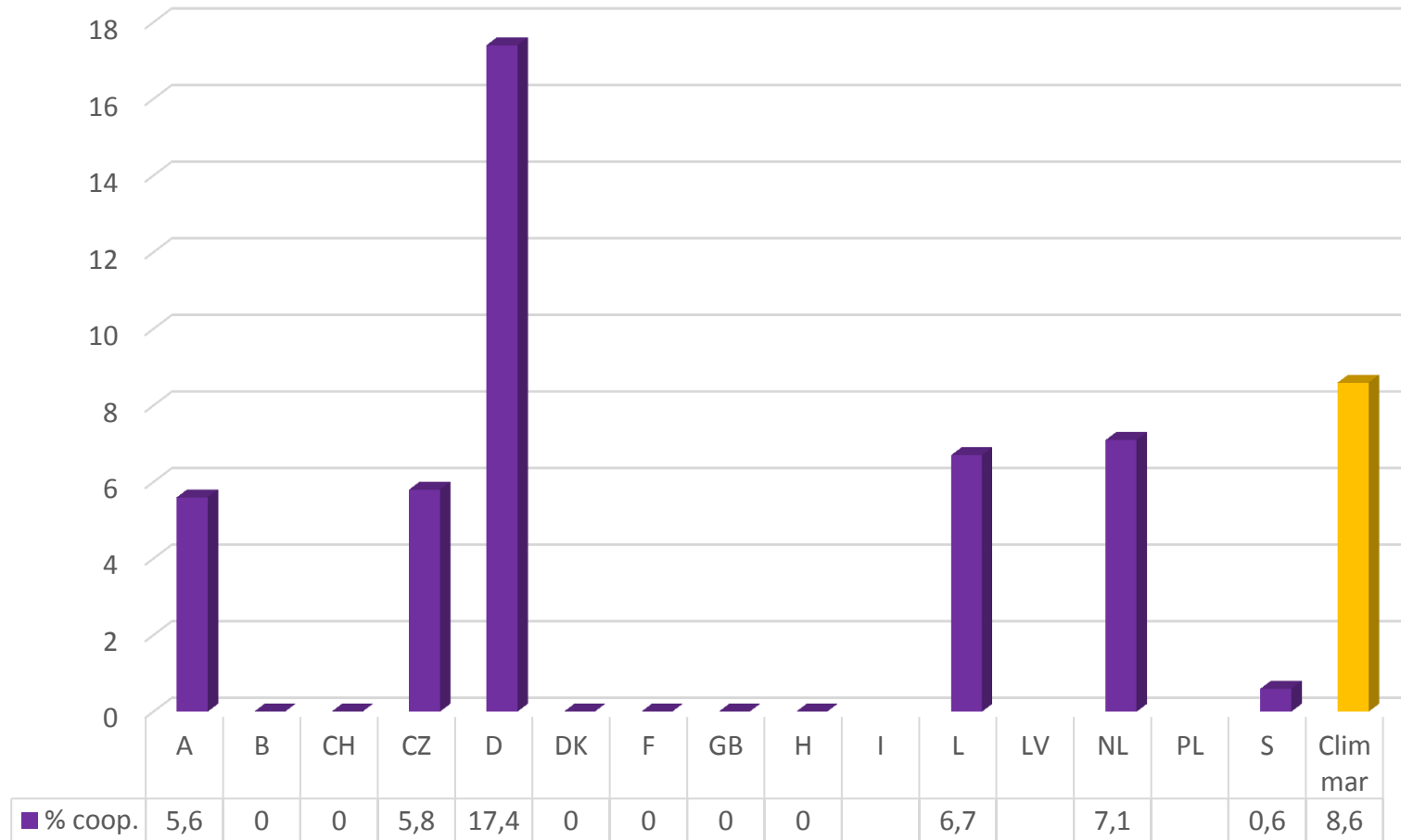
relations: % Apprentices (of Employees)





National Markets and Structures:

relations: % Cooperatives (of Dealers)





Part II - Trends:

I. Comparison to same period last year: January - June 2015				
		- (minus / worse)	= (equal)	+ (plus / better)
A.	Turnover total	A CZ D DK F GB H L NL S	B	
A.I	Turnover Machinery	A B CZ D DK F GB H L NL S		
A.I.1	New machinery	A B CZ D DK F GB H L NL S		
A.I.2	Second hand machinery	CZ DK F GB NL	A H L S	B D
A.II	Turnover Workshop	CZ	B DK GB H L NL S	A D F
A.III	Turnover Spare Parts	CZ	B D DK F GB H L NL S	A
B.	Costs		CZ DK NL	A B D GB H L S
C.	Employees	A NL	CZ DK F GB H L S	B D
E.	Stock	A	B D DK S	CZ F GB H L NL



Part II - Trends:

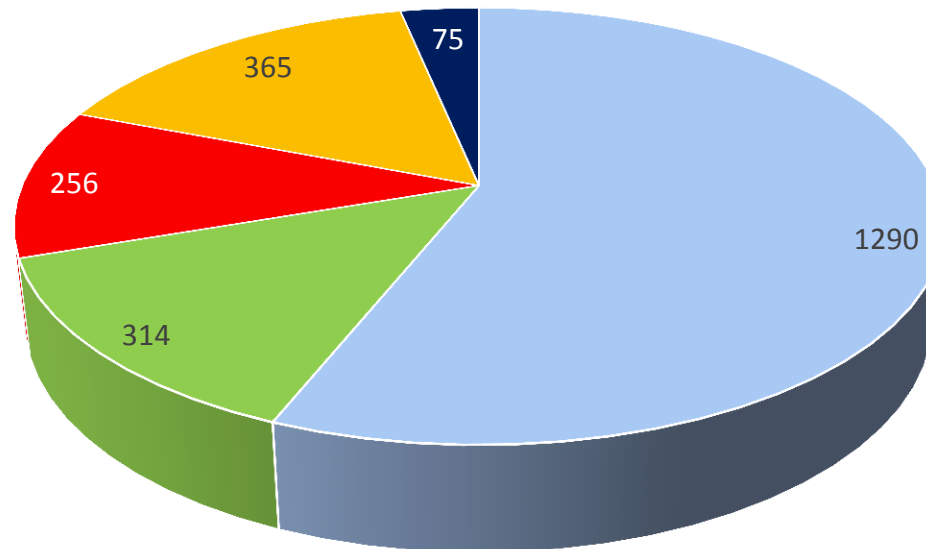
II. Expectation for the following quarter: July - December 2015

		- (minus / worse)	= (equal)	+ (plus / better)
A.	Turnover total	A CZ D GB L NL	B S	B H
A.I	Turnover Machinery	A B D GB L NL	B S	H
A.I.1	New machinery	A B D GB L NL	B S	H
A.I.2	Second hand machinery	GB H L NL	A B D H S	
A.II	Turnover Workshop	NL	B L S	A B D GB H
A.III	Turnover Spare parts	NL	B L S	A B D GB H
B.	Costs		B CZ H NL S	A D GB L
C.	Employees	A S	B CZ D GB H L NL	
E.	Stock	A	B H S	CZ D GB L NL



Part III - Companies:

turnover-structure of the average CLIMMAR-dealer



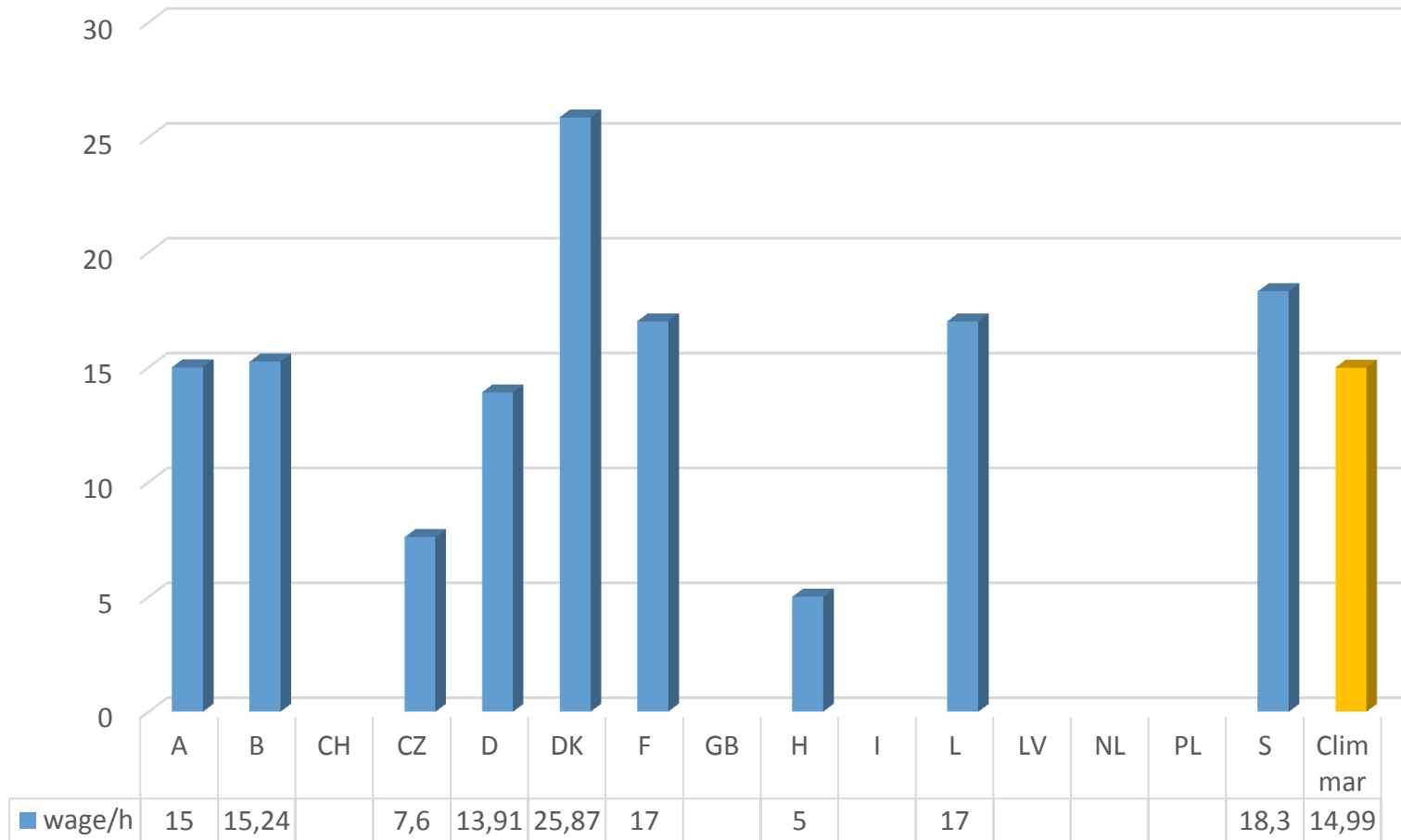
total:
3.093.000 €/comp.

■ new equipm. ■ second hand ■ parts ■ workshop ■ externals



Part III – Companies:

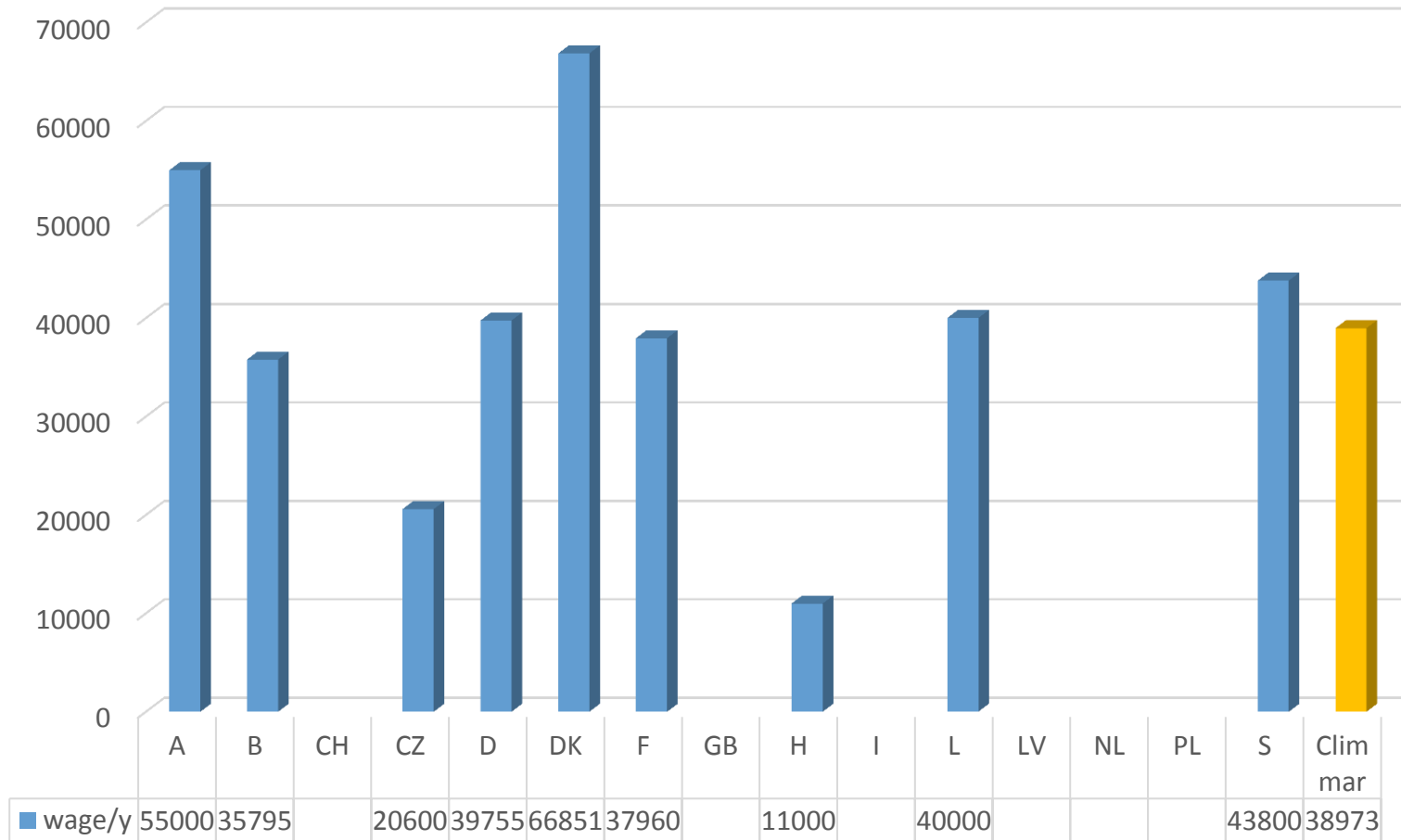
Wage per hour (average mechanic)





Part III – Companies:

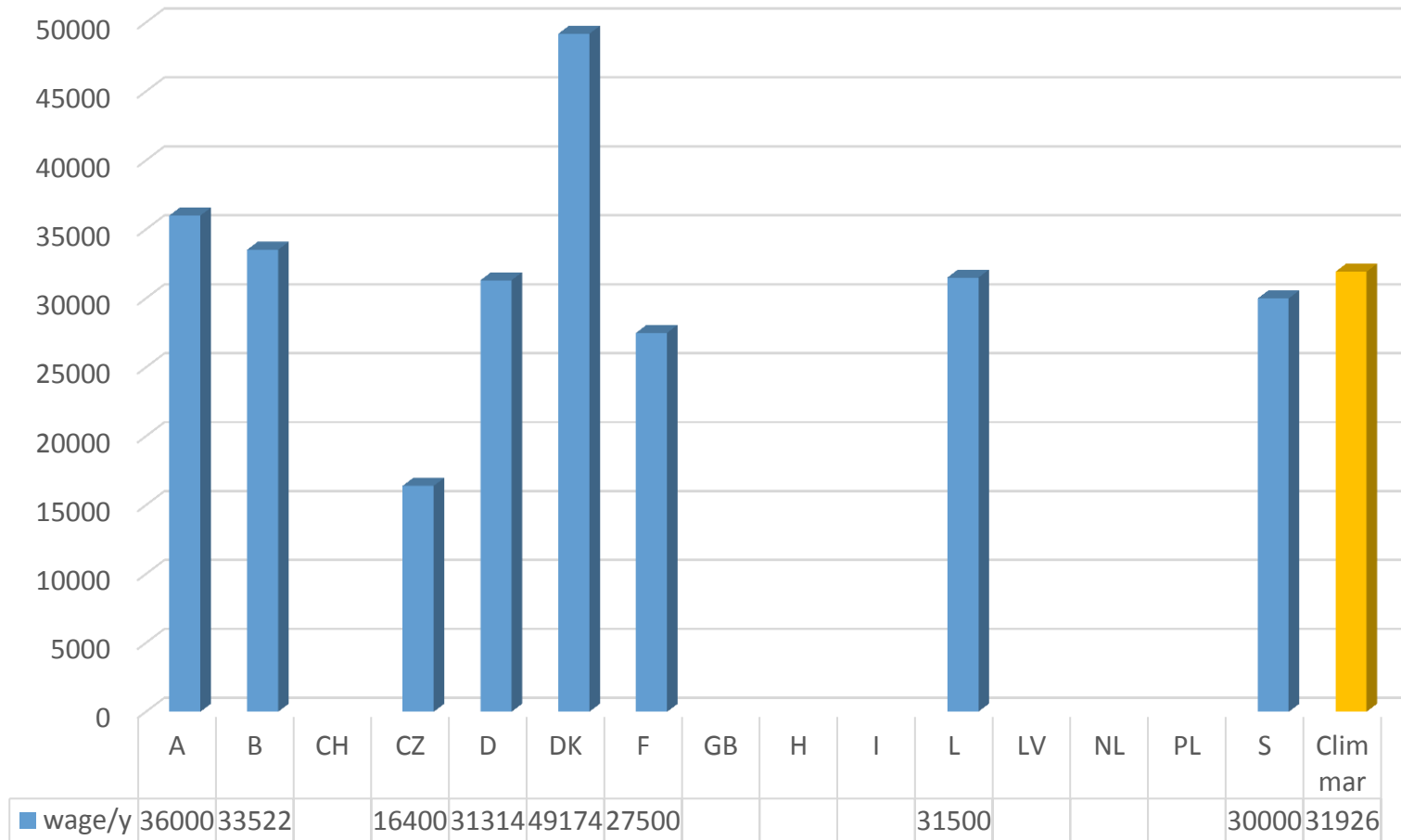
Wage per year (master)





Part III – Companies:

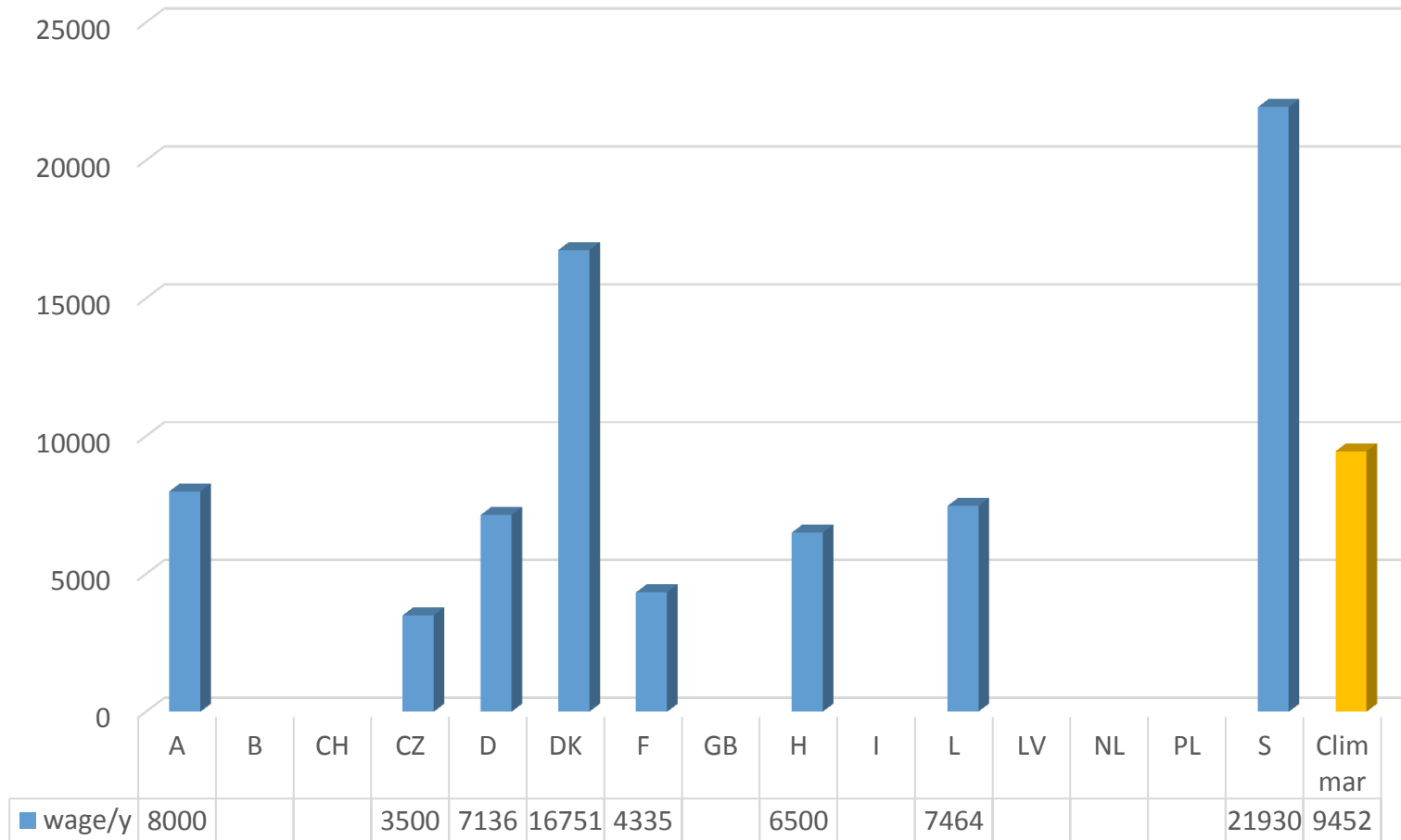
Wage per year (partsman)





Part III – Companies:

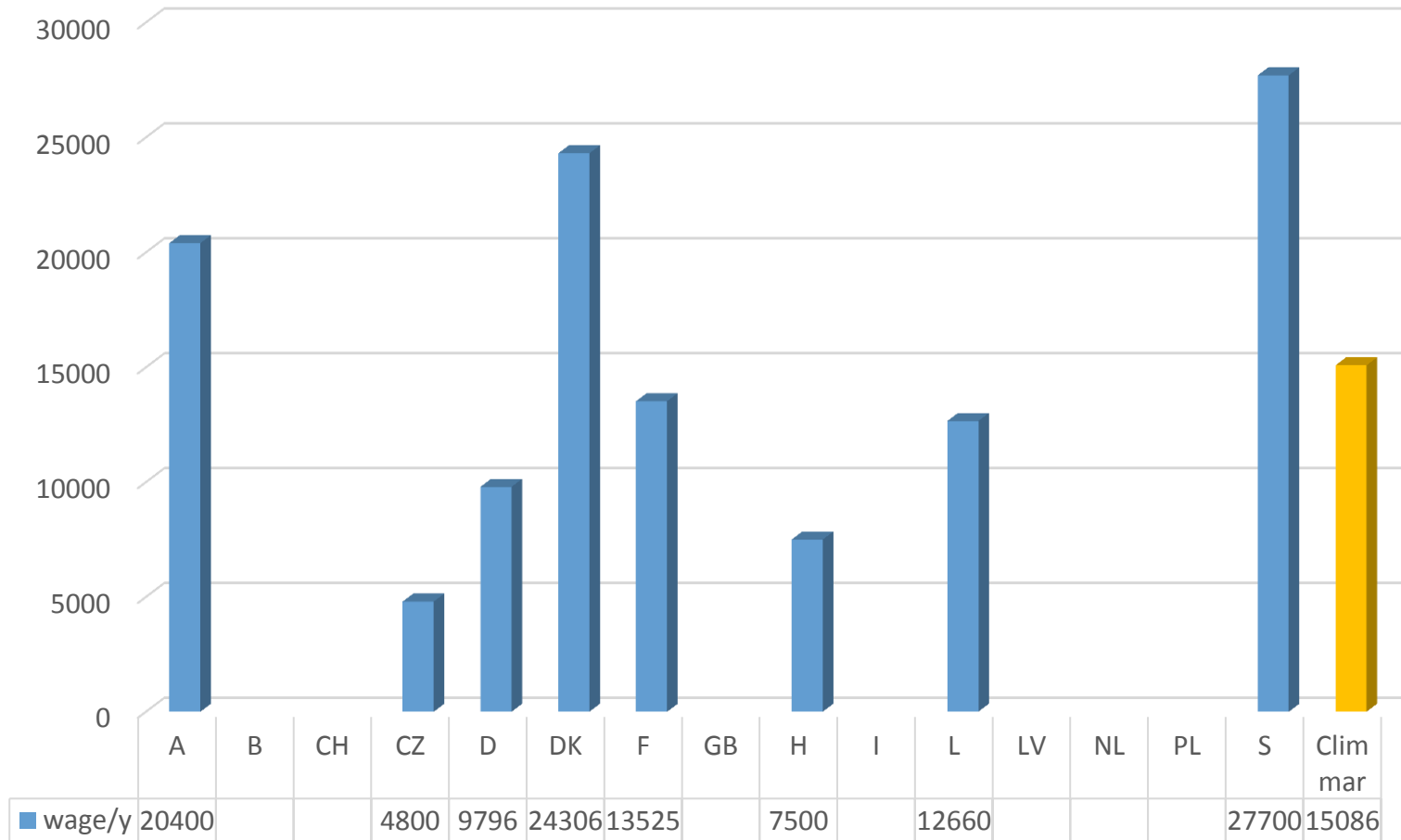
Wage per year (apprentice, 1st year)





Part III – Companies:

Wage per year (apprentice, 4th year)





Part IV – Warranty Conditions:

CLIMMAR Branch Report: **Warranty & Manufacturer conditions** (1st of July 2015)

fictional example

Working period calculation	<i>reference periods / actual periods</i>	Table of reference periods
	<i>wages / hour</i>	€ 65,- / (100% external rate)
	<i>Inclusive diagnostic / setup period</i>	Yes
Compensation	<i>Components</i>	Price list less dealer discount plus mark-up as per bonus table
	<i>outside services</i>	100%
	<i>transport</i>	Lump sum in annual bonus
Submission	<i>Communications channel</i>	Online, own EDP system
	<i>Closing date</i>	Max. 30 days after repairs completed
	<i>Credit time</i>	Currently 24 hours
Arrangements for replacement machine		None
Obligation to store old components		Yes, pending acceptance by Technical Field Support
Standard goodwill arrangements		No
Changes to remuneration model within last 2 years		No
Extension of warranty for new machine	<i>possible: yes / no</i>	Yes (manufacturer's option)
	<i>conditions</i>	Experts' check plus € 1500,-/a
Cost per year for the datasystem that is needed for technical support		€ 1.500,-/a
Cost per hour for a manufacturers' specialist		€ 120,-/h



Part IV – Warranty Conditions:

		A	B	CH	CZ	D	DK	F	GB	H	I	L	LV	NL	PL	S
warranty-conditions receivable for following brands:	JD	x	x	x		x	x	x				x				
	NH	x	x	x		x	x					x				
	Claas	x	x	x		x	x	x								
	MF	x	x	x		x	x					x				
	SDF	x	x	x		x	x									
	Case	x	x	x		x	x	x					x			
	Valtra	x	x			x	x	x					x			
	Fendt	x		x		x	x						x			
	Landini	x				x	x									
	Kubota			x		x										
	JCB					x										
	Kuhn	x				x	x	x					x			
	Pöttinger	x				x	x	x					x			
	Krone	x				x	x	x					x			
	Merlo					x		x								



Part IV – Warranty Conditions:

survey-part	country:	A	B	CH	CZ	D	DK	F	GB	H	I	L	LV	NL	PL	S
national structures	basics	100	100	90	100	100	100	80	100	100		100	0	100		100
	segments	0	80	0	60	50	80	10	15	80		80	80	0		100
markets & trends	comparaison	100	100	100	100	100	100	100	100	100		100	0	100		100
	expectations	100	100	0	33	100	0	100	100	100		100	0	100		100
companies' structures	turnover	20	15	0	100	100	20	100	0	100		0	0	80		100
	costs	0	80	0	100	100	20	20	0	0		0	0	0		0
	wages	100	60	0	100	100	100	100	0	100		100	0	0		100
	tariffs					100										
	% oblig.	80	69	48	100	100	80	95	50	100	0	75	0	70	0	100
	% free	33	87	0	64	83	33	43	38	60	0	60	27	33	0	67



Workgroup 2: Meeting 2015, 15th Oct.

Results:

- Analysis survey 2015:
We see development in some countries
but not in all
in some cases we see misunderstanding of questions
- We adjusted the survey for 2016:
some explanations are more concrete
surveys were developed just in a few aspects
- We discuss integrating external experts for similar
aspects





Hoping for a growing development

(hoping for a change in paradigma of daily work on every members-association's office)

Thanks a lot for your patience!

