

CLIMMAR Branch Report

presented by Workshop 2: Data and Surveys



Chairman: Ulf Kopplin, Vicepresident CLIMMAR

CLIMMAR Congress, 20-22 October 2016,
Venice, Italy



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:

01-2015: Würzburg (D):

Meeting of the working group during the LTU conference

Creation of 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:

04-2015: Utrechts (NL):

survey proposals discussed and decided to act like suggested

10-2015: Stockholm (S):

evaluation survey of 2015 -results:

- **12** (of 15) members answered, **51%** of answers reached
- some grew better, some didn't change anything noticeable

04-2016: Bruxelles (B):

some small changes in the surveys for 2016

10-2016: Venice (I):

evaluation surveys of 2016 – result:

- **14** (of 16) members answered, **64%** of answers reached
- some are growing better, some didn't change anything noticeable
- Survey was adjusted a bit –
more explanations and examples added, not relevant aspects deleted

Workgroup 2 (Services - Data & Surveys)



Participation of CLIMMAR Branch Report 2016 per Country

survey-part	country:	A	B	CH	CZ	D	DK	F	GB	H	I	L	LV	NL	PL	S	SK	CLIM-MAR
market & structures	basics	80	90	0	100	100	100	0	0	100	80	90	90	80	40	60	85	68
	segments	0	100	0	50	50	40	0	0	20	0	20	0	0	0	60	0	21
markets trends	comparison	100	100	100	100	100	100	0	0	100	100	100	100	100	100	100	100	88
	espectations	100	100	100	100	100	100	0	0	100	100	0	0	0	100	0	100	63
companies' structures	turnover	20	15	0	100	100	0	0	0	100	100	0	0	80	100	100	100	51
	costs	0	90	0	100	100	0	0	0	0	15	0	0	0	0	0	0	19
	wages	100	60	0	100	100	0	0	0	100	100	100	0	0	0	100	40	50
summary: participation	oblig. questions	75	66	25	100	100	50	0	0	100	95	73	48	65	60	90	81	64
	free questions	33	97	33	83	83	47	0	0	40	38	7	0	0	33	20	33	34
tendency:		⇒	↗	↘	↗	↘	↘	?	?	↘	↗	↘	↘	↘	↗	↘	↗	↗
Warranty - development vs. 2015		=	+1	+1	=	-6	-3	-8	=	=	+7	-1	=	=	=	=	+1	

obligatorily survey part
 free to fulfill survey part

green more than 60% is answered
red less than 40% is answered



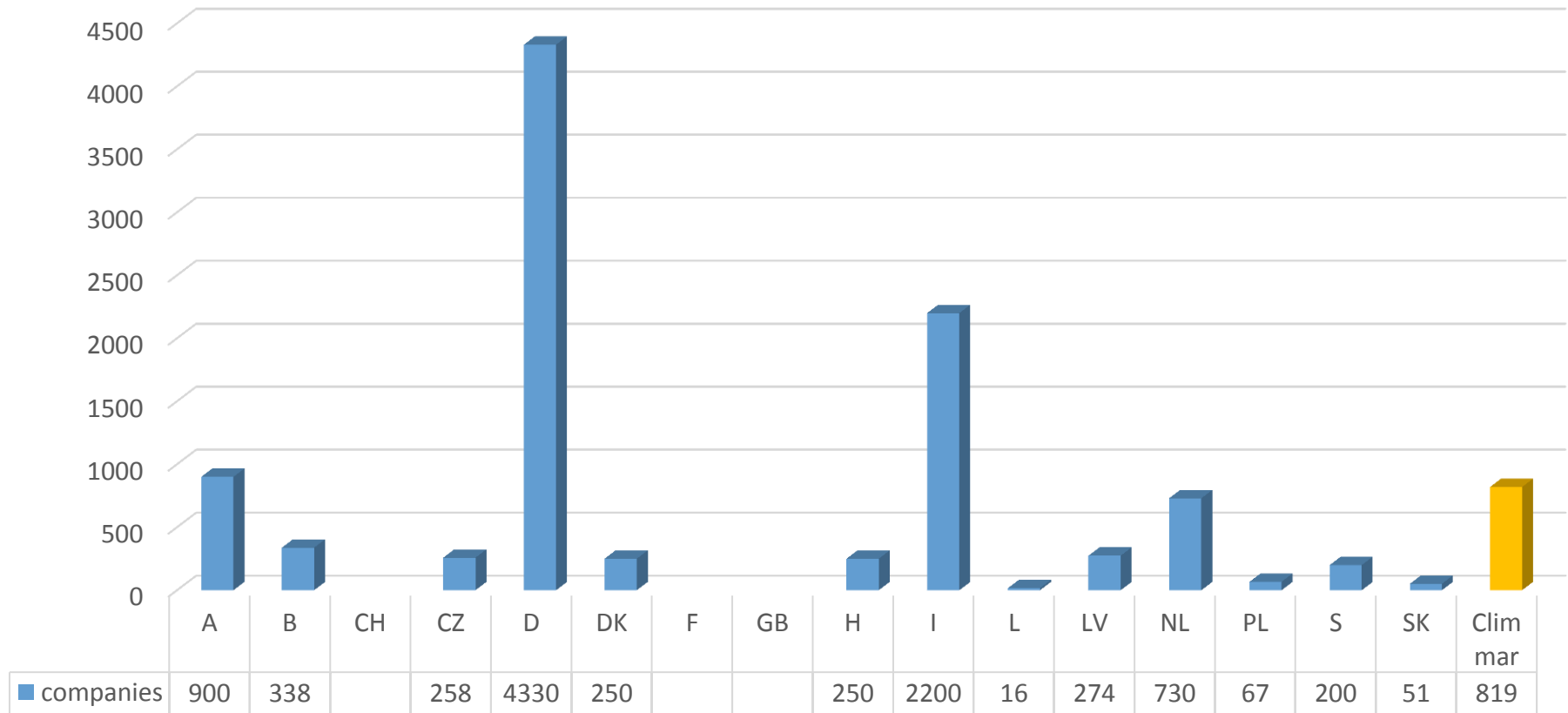
Results 2016:

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**

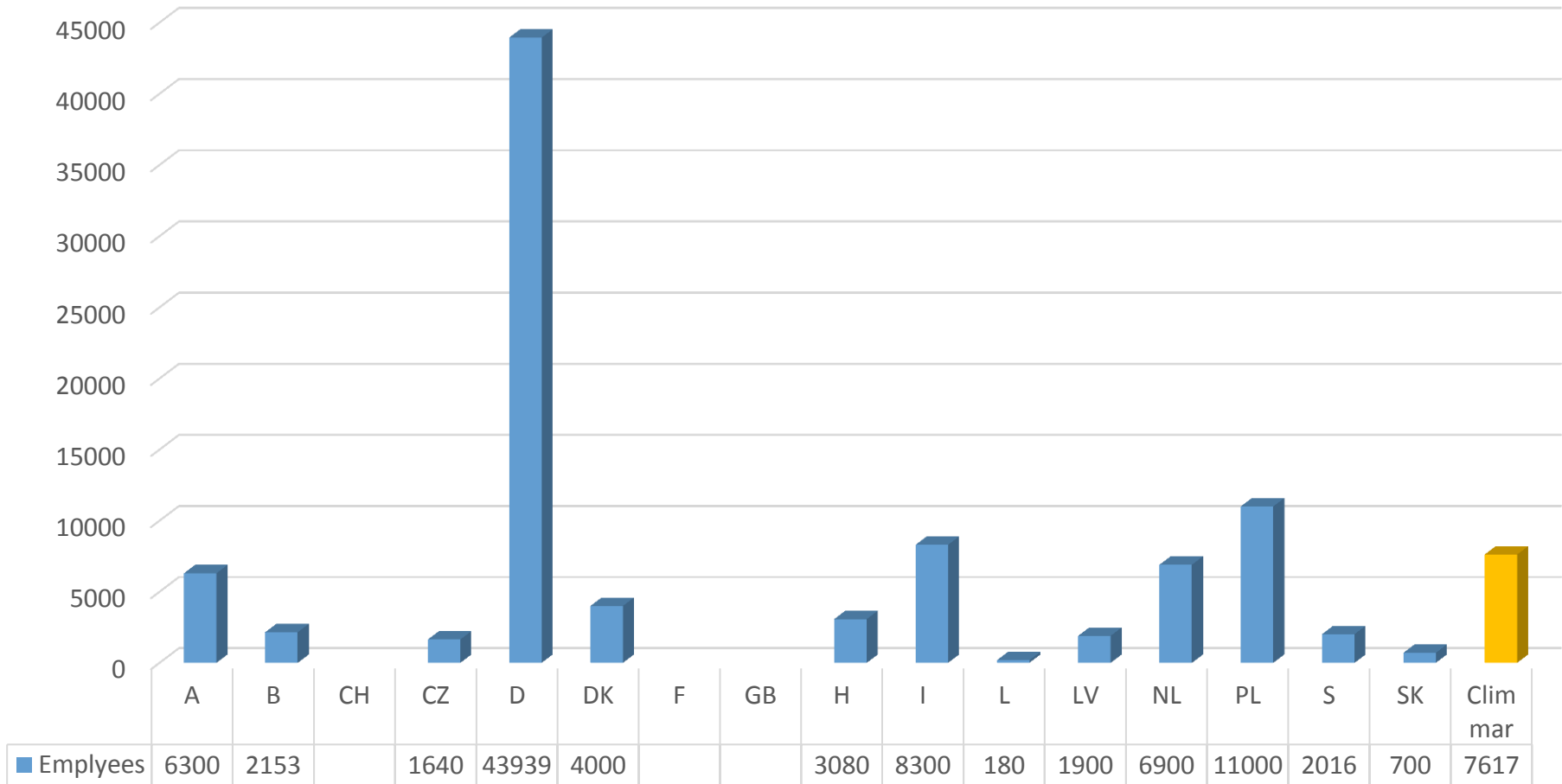


National Markets and Structures: Number of Companies: Dealers (incl. satellites) & Servicemen





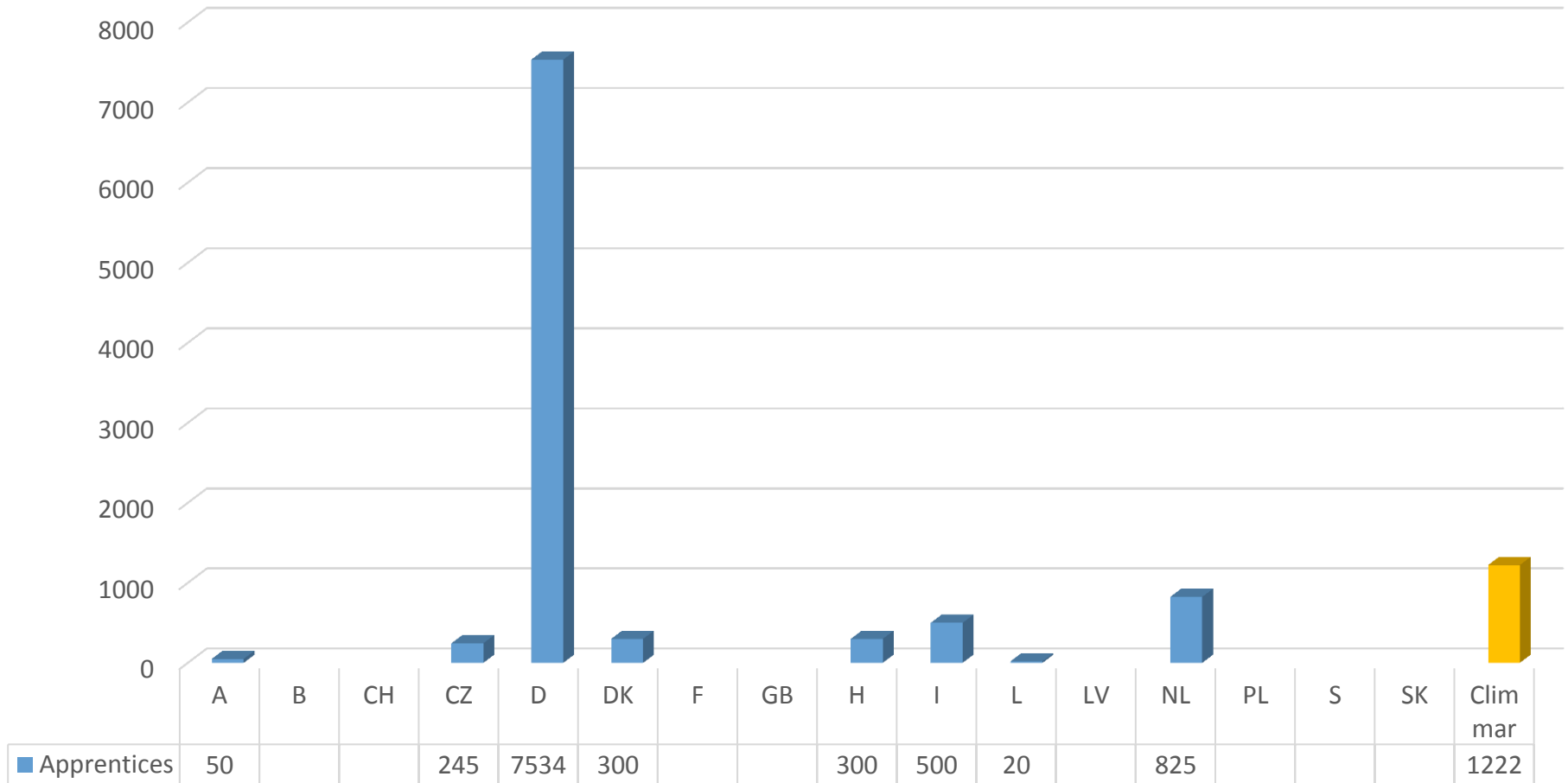
National Markets and Structures: Employees





National Markets and Structures:

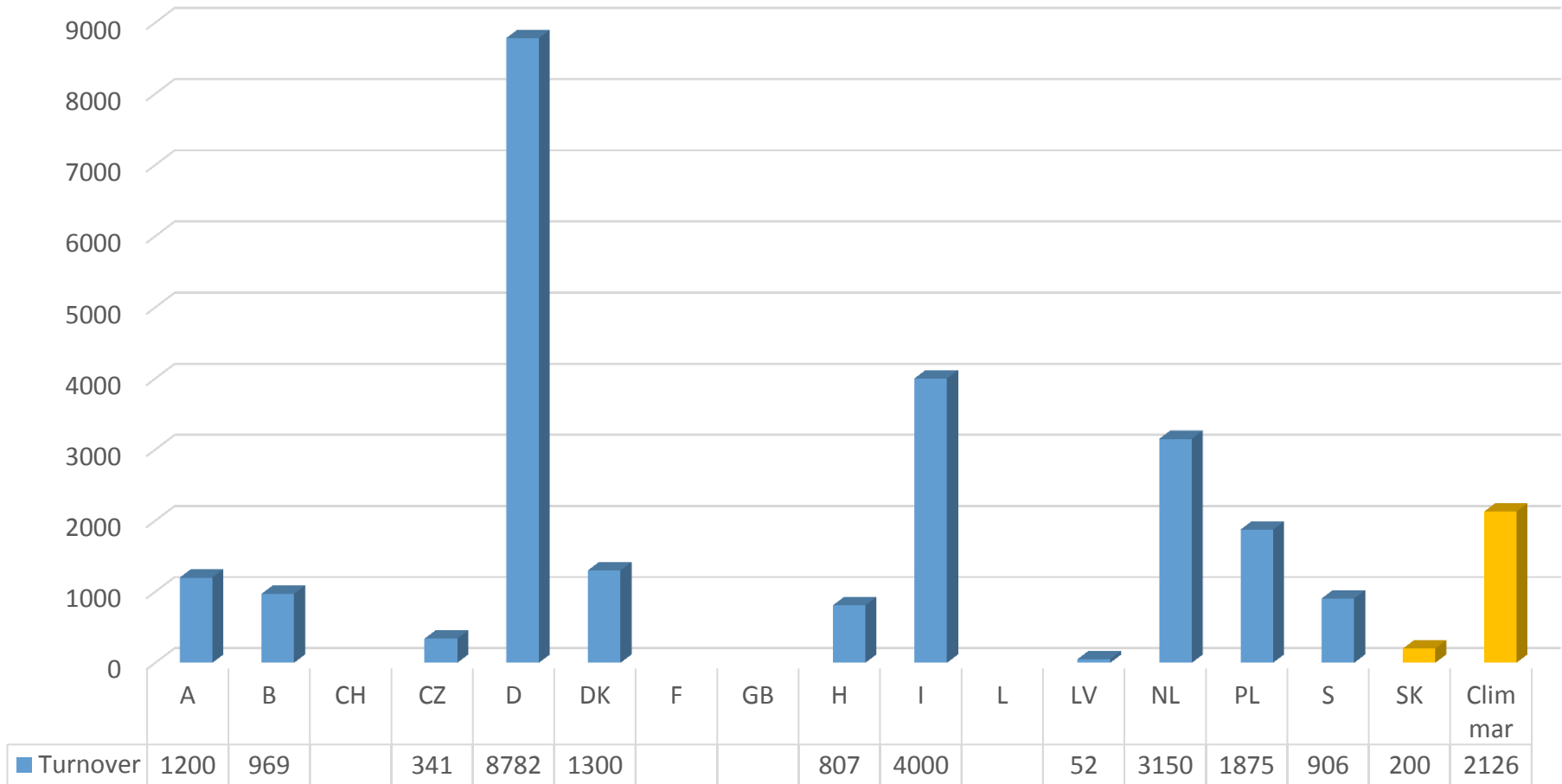
Apprentices





National Markets and Structures:

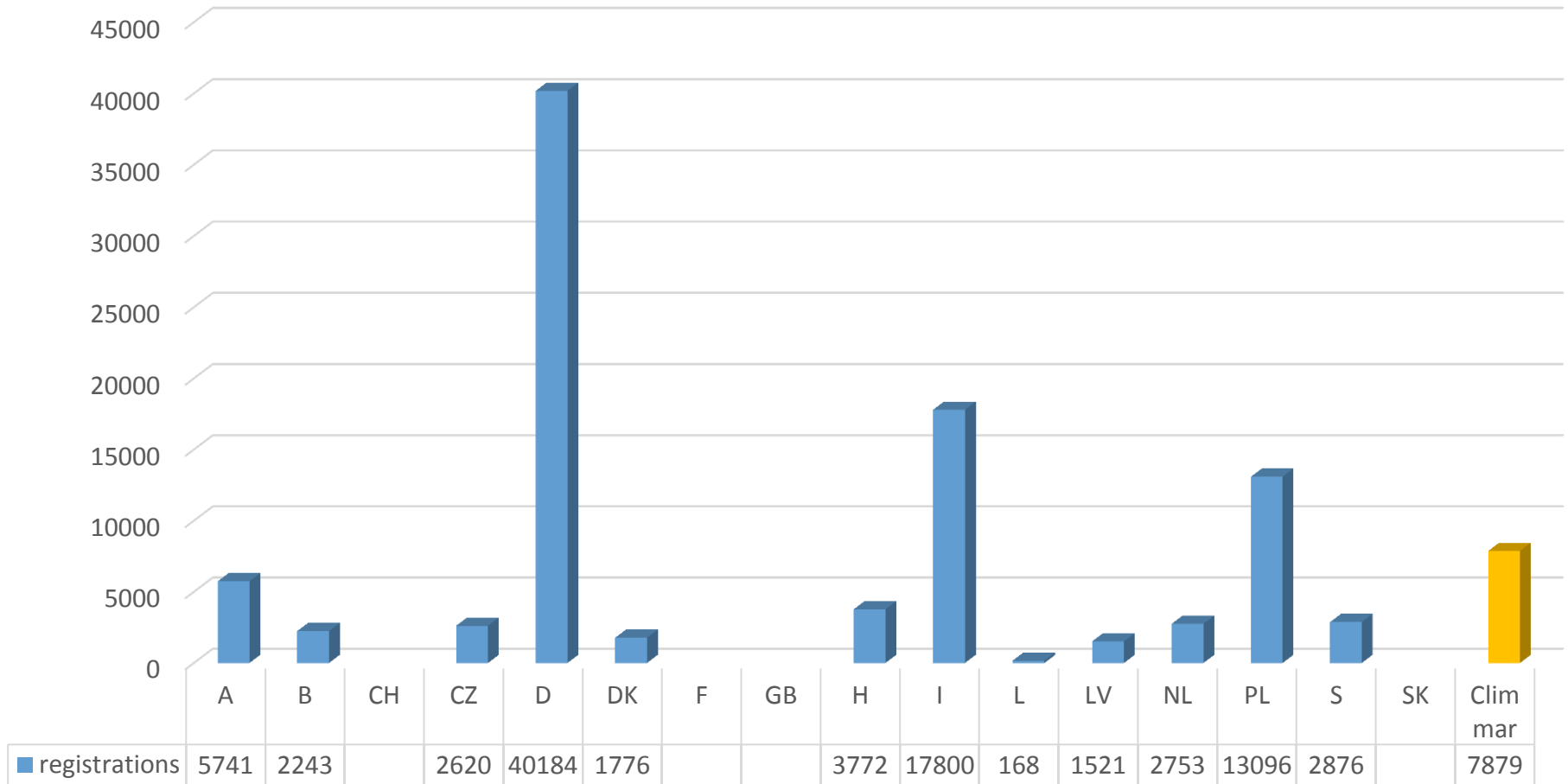
Turnover (in 1000 €)





National Markets and Structures:

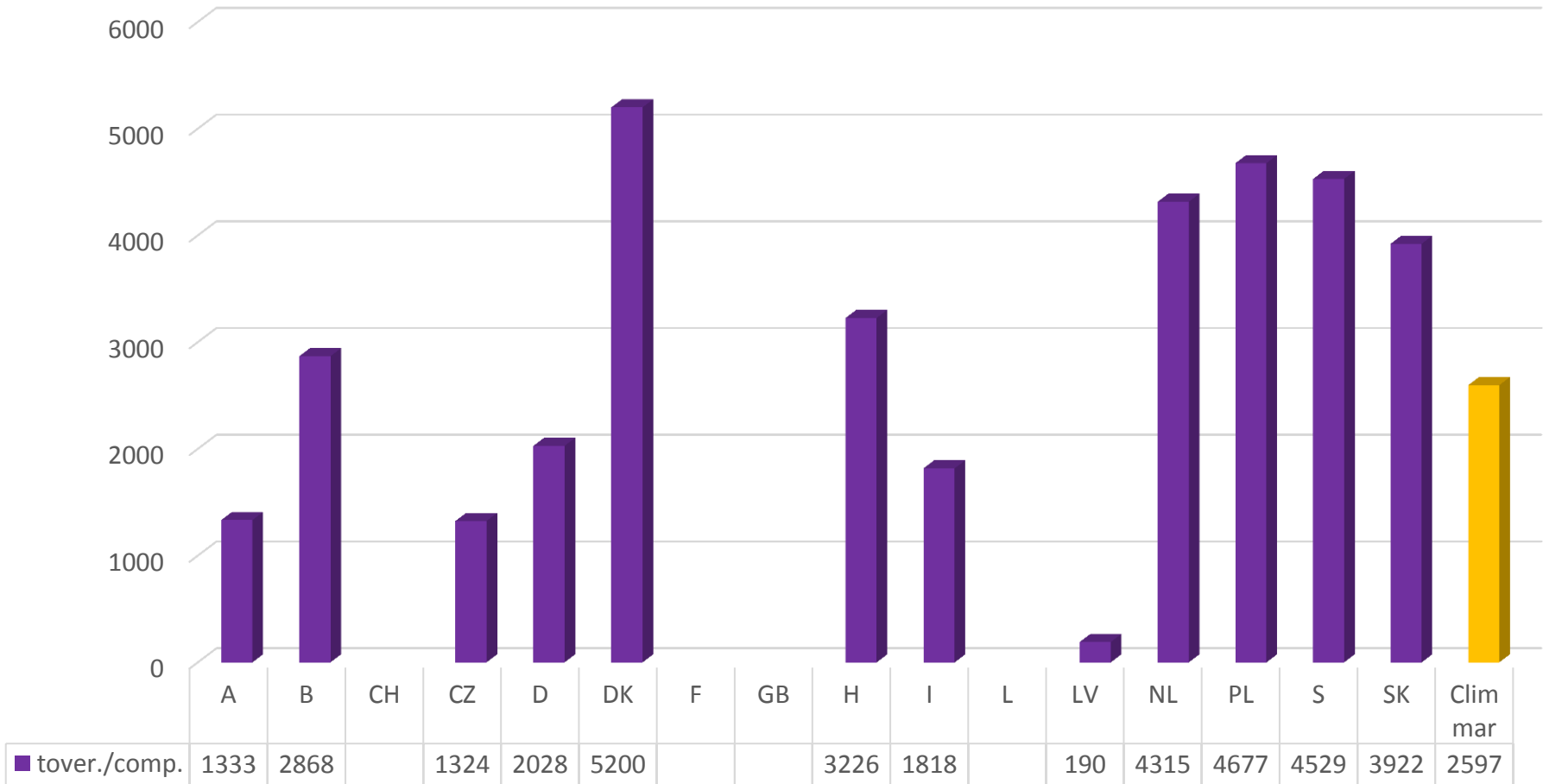
Tractor Sales





National Markets and Structures:

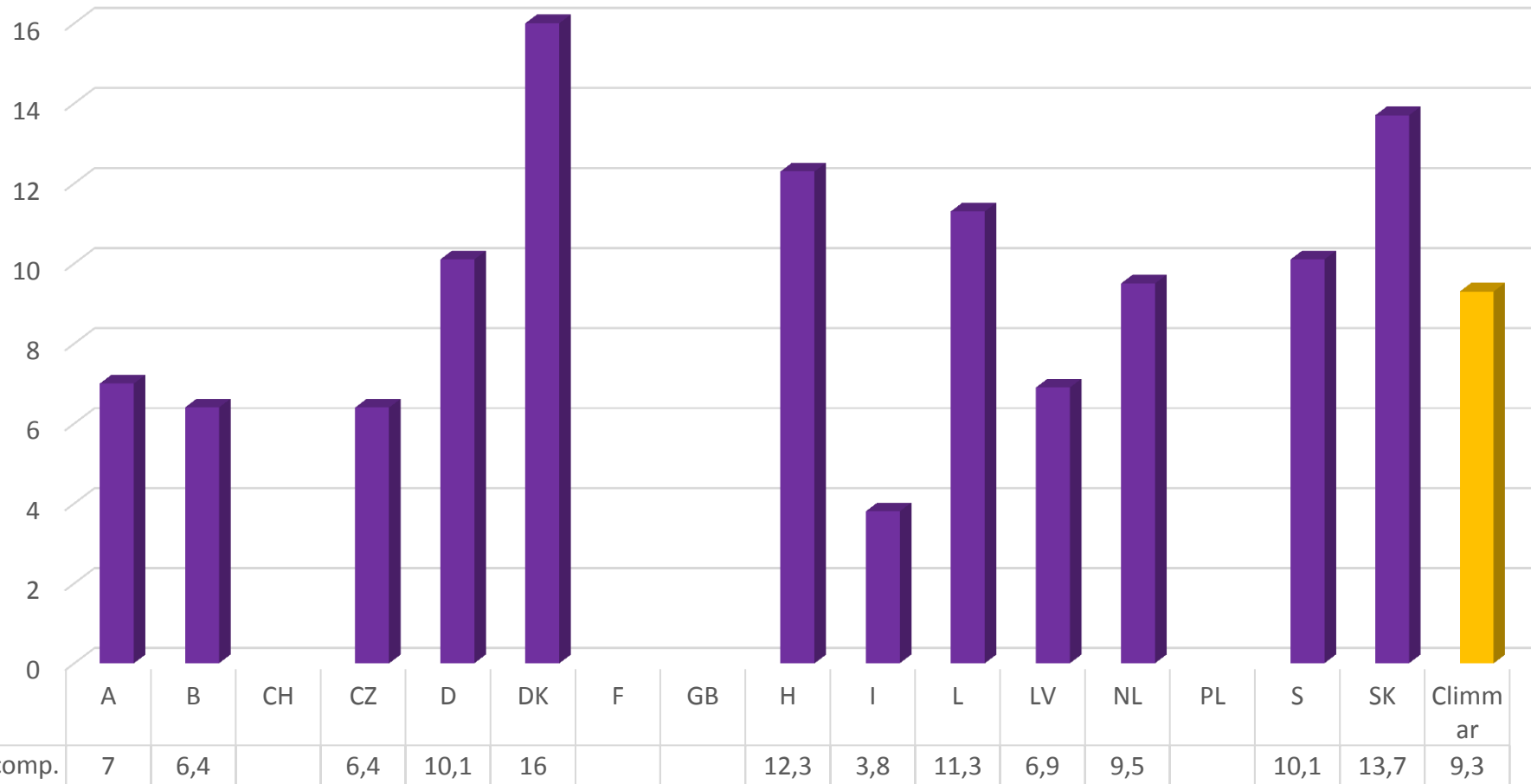
relations: Turnover per Company





National Markets and Structures:

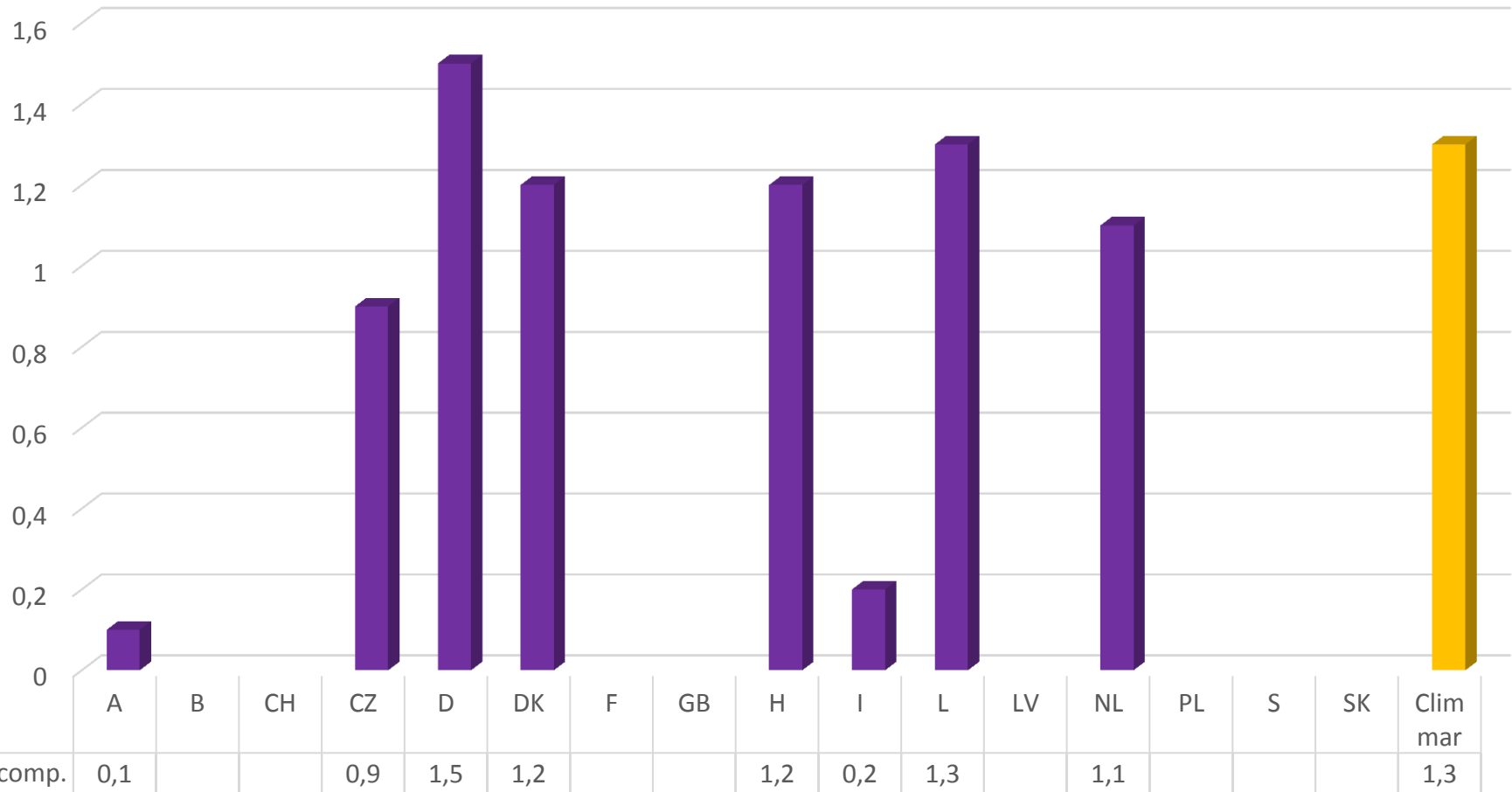
relations: Employees per Company





National Markets and Structures:

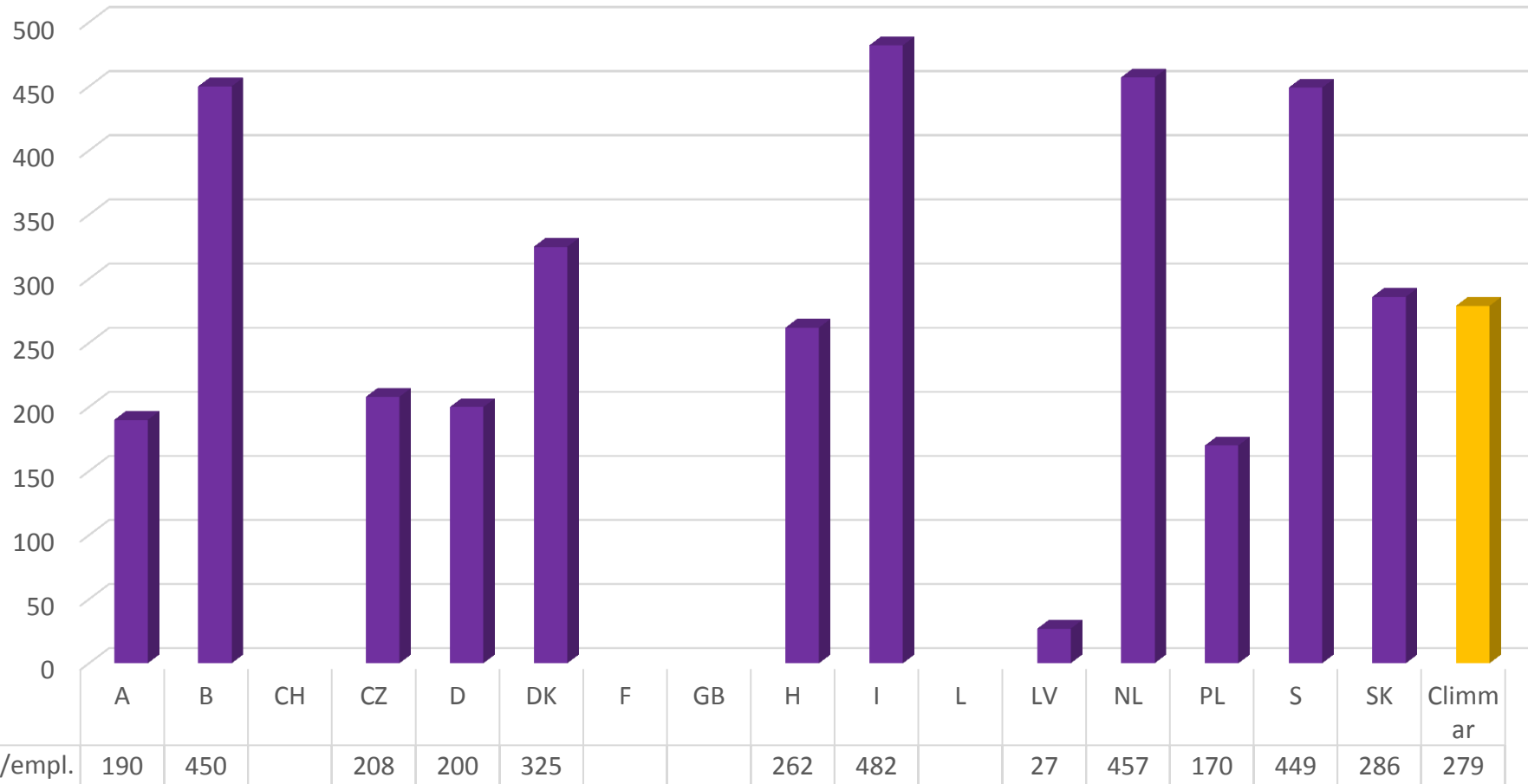
relations: Apprentices per Company





National Markets and Structures:

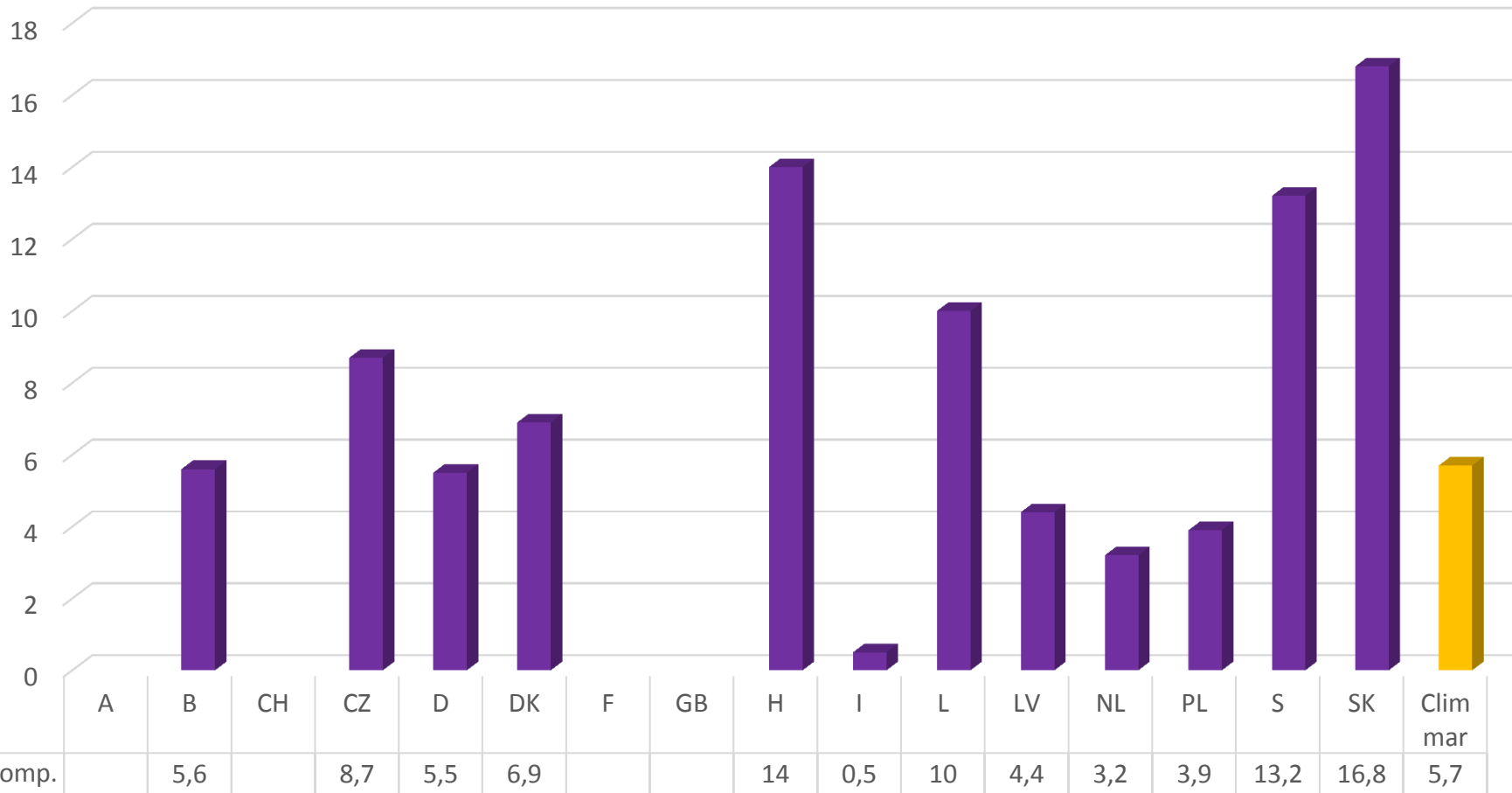
relations: Turnover per Employee





National Markets and Structures:

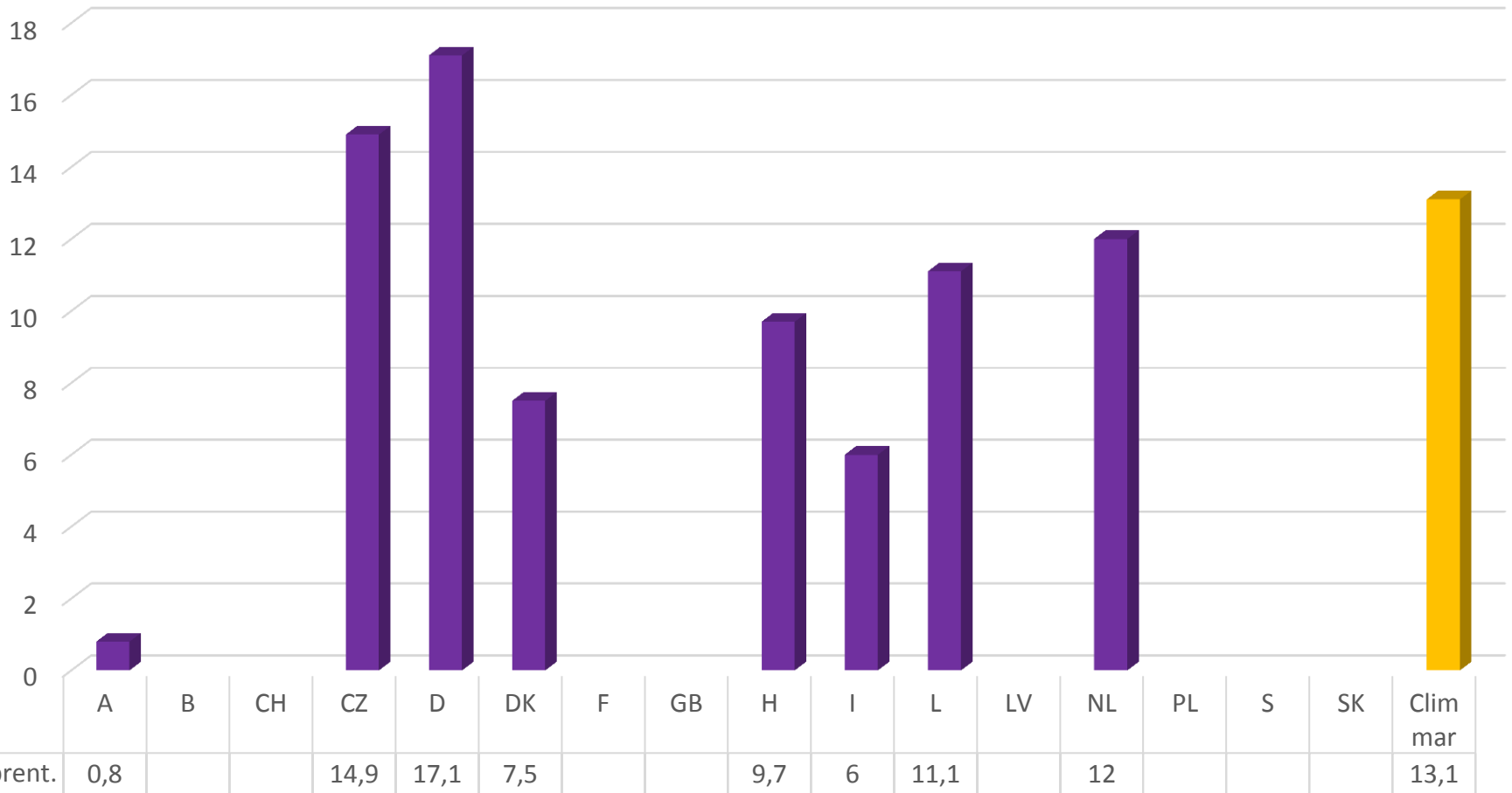
relations: Tractors` sales (>50 hp) per company





National Markets and Structures:

relations: % Apprentices (of Employees)





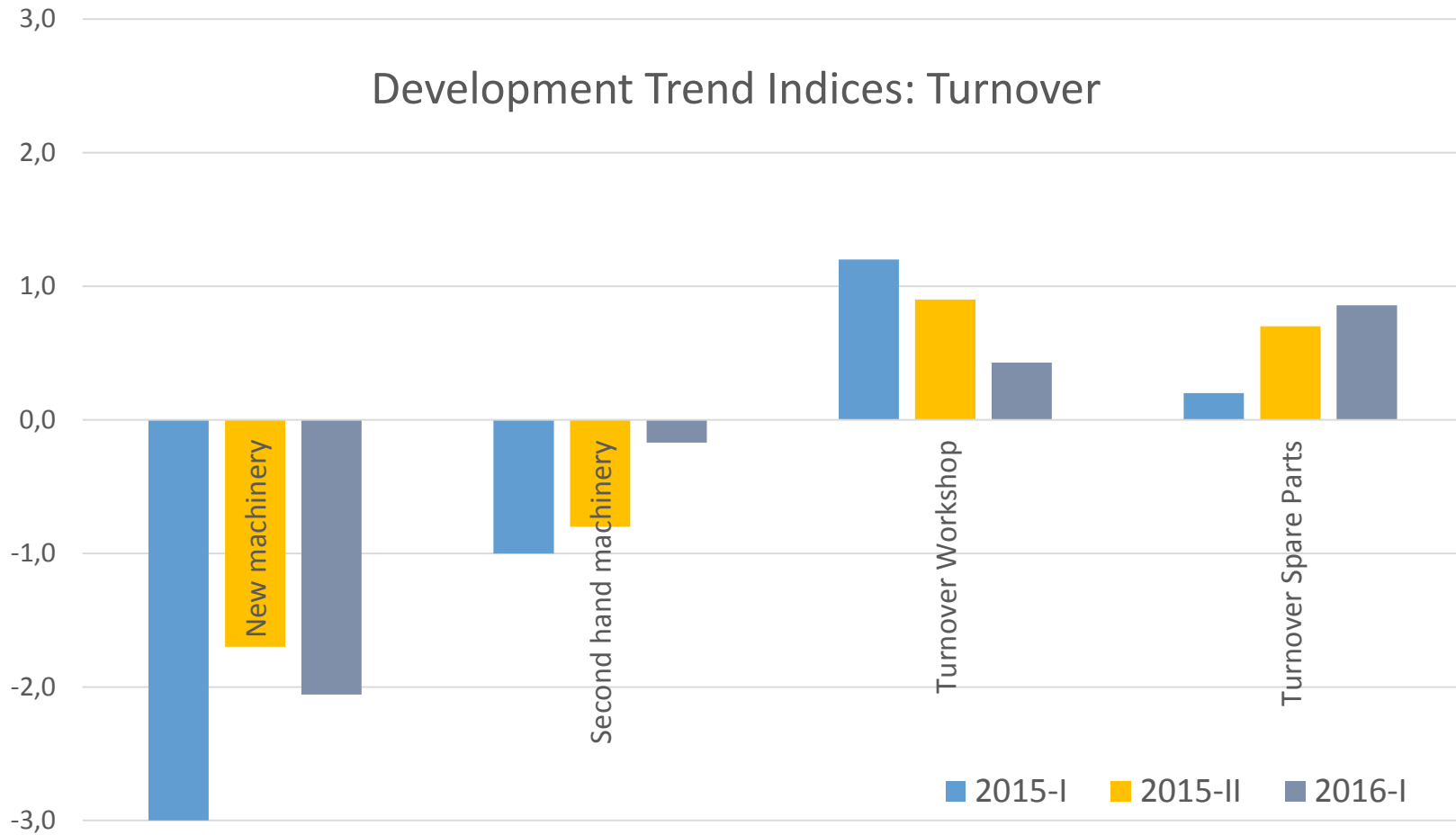
Part II - Trends:

I. Comparison to same period last year: January - June 2016

		- (minus / worse)	= (equal)	+ (plus / better)
A.	Turnover total	A B CH CZ D H I PL	DK	SK
A.I	Turnover Machinery	A B CH CZ D H I PL	DK	SK
A.I.1	New machinery	A B CH CZ D H I PL	DK	SK
A.I.2	Second hand machinery	A PL	B CH CZ D DK I SK	H
A.II	Turnover Workshop	A	CH CZ D PL SK	B DK H I
A.III	Turnover Spare Parts	A	B CH CZ D PL	DK H I SK
B.	Costs	H PL	A B CH CZ D DK I SK	
C.	Employees	A	B CH CZ D DK I PL SK	H
E.	Stock	H PL	A B CH CZ D DK I SK	
F.	Investments	A B CZ D DK I PL SK	CH H	



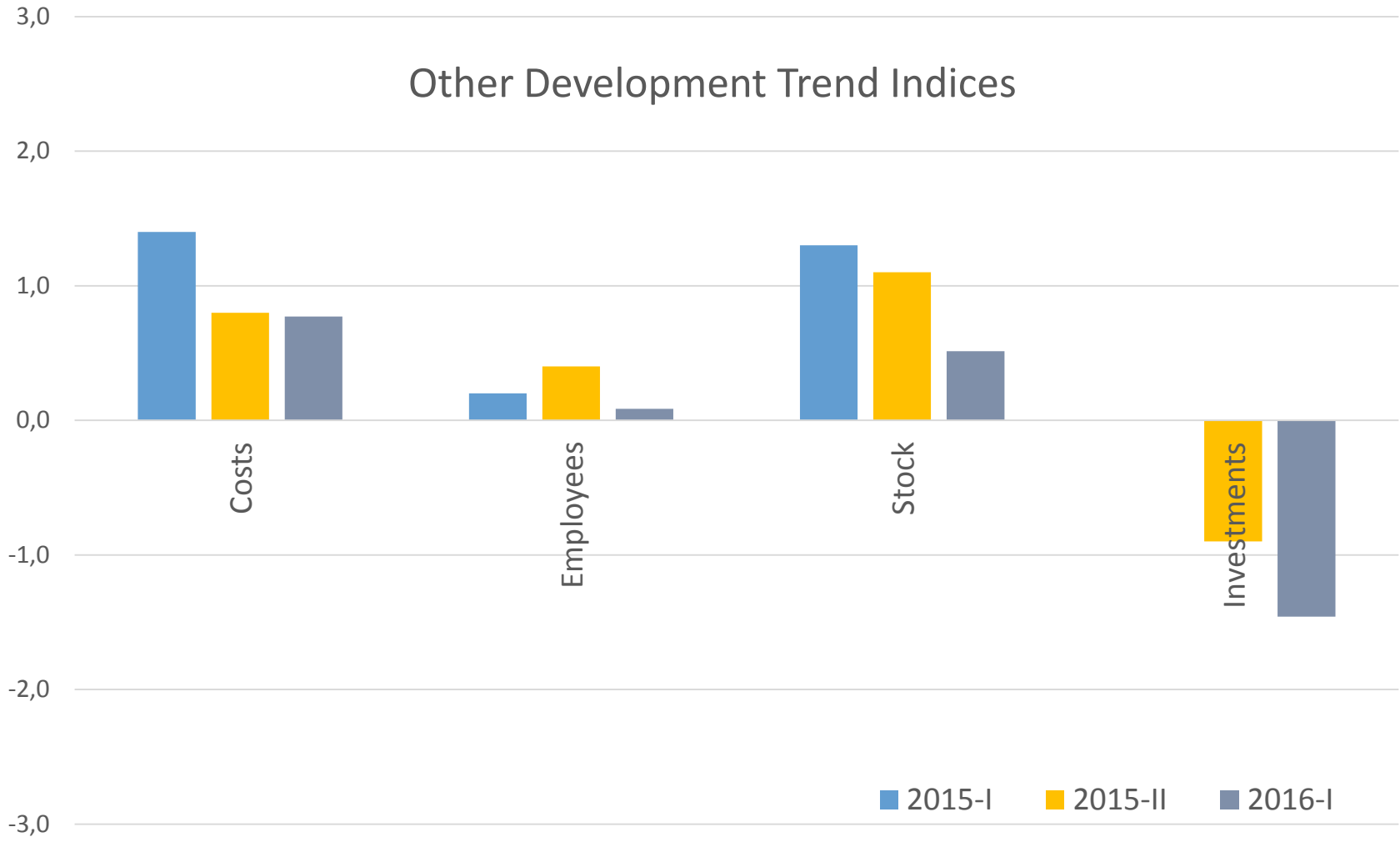
Part II - Trends:





Part II - Trends:

Other Development Trend Indices





Part II - Trends:

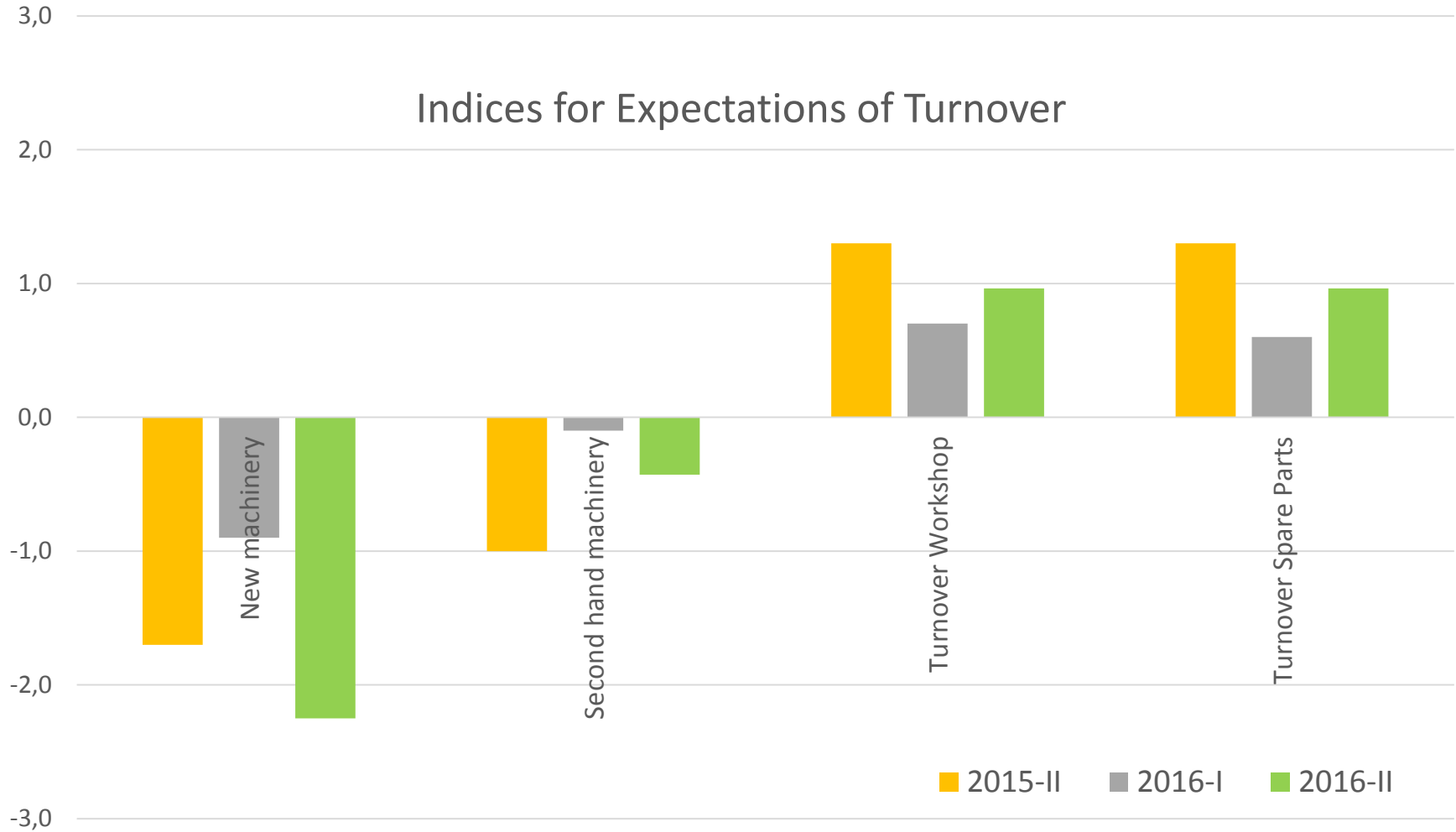
II. Expectation for the following quarter: July - December 2016

		- (minus / worse)	= (equal)	+ (plus / better)
A.	Turnover total	A B CH CZ D H I PL	DK	SK
A.I	Turnover Machinery	A B CH CZ D H I PL	DK	SK
A.I.1	New machinery	A B CH CZ D H I PL	DK	SK
A.I.2	Second hand machinery	A PL	B CH CZ D DK I SK	H
A.II	Turnover Workshop	A	CH CZ D PL SK	B DK H I
A.III	Turnover Spare parts	A	B CH CZ D PL	DK H I SK
B.	Costs	H PL	A B CH CZ D DK I SK	
C.	Employees	A	B CH CZ D DK I PL SK	H
E.	Stock	H PL	A B CH CZ D DK I SK	
F.	Investments	A B CZ D DK I PL SK	CH H	



Part II - Trends:

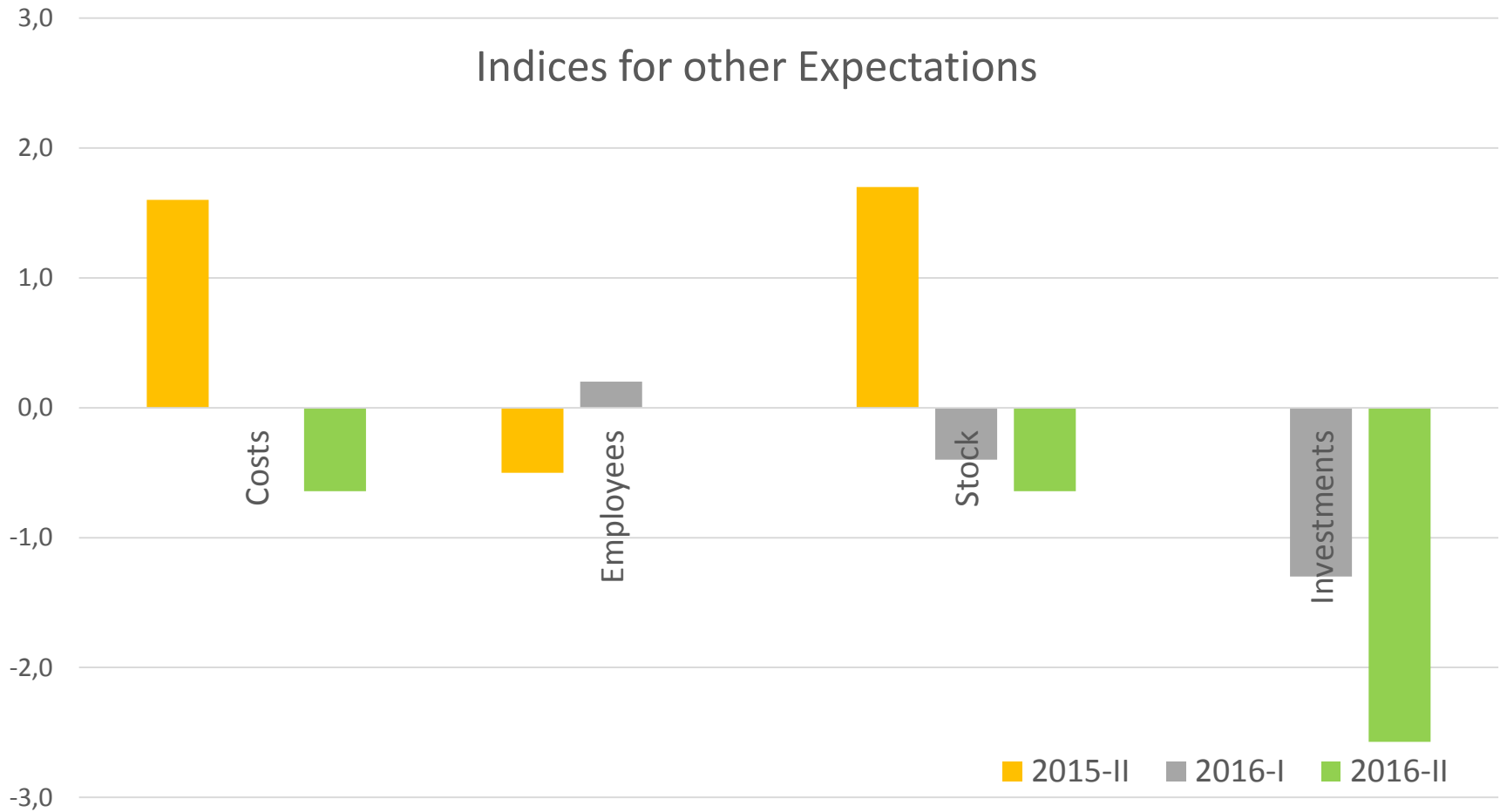
Indices for Expectations of Turnover





Part II - Trends:

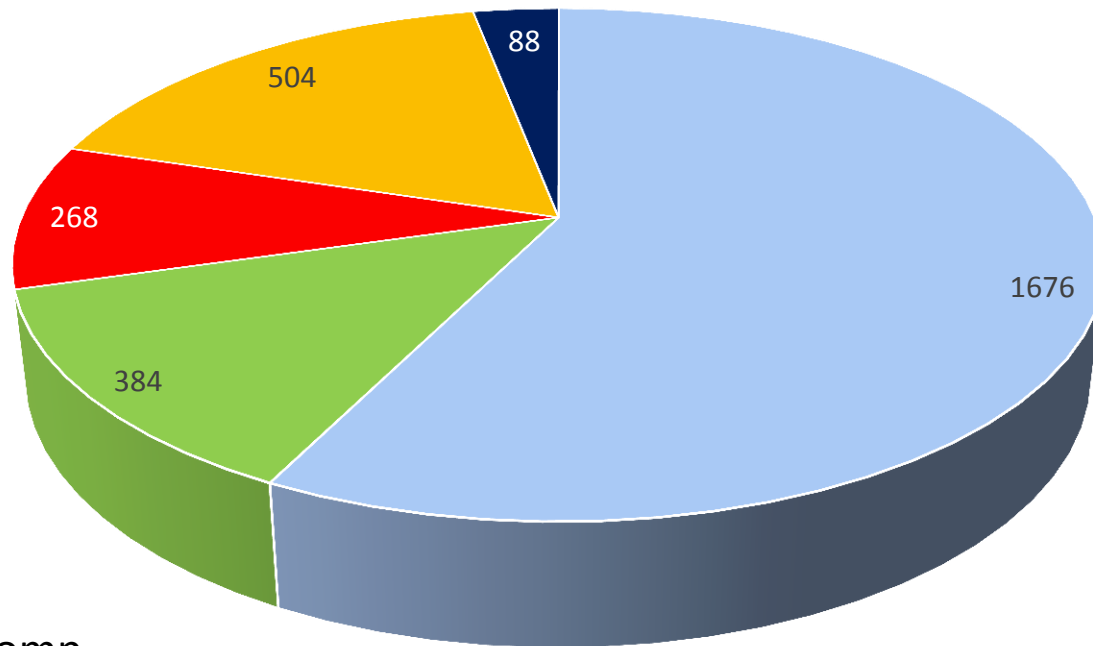
Indices for other Expectations





Part III - Companies:

turnover-structure of the average CLIMMAR-dealer



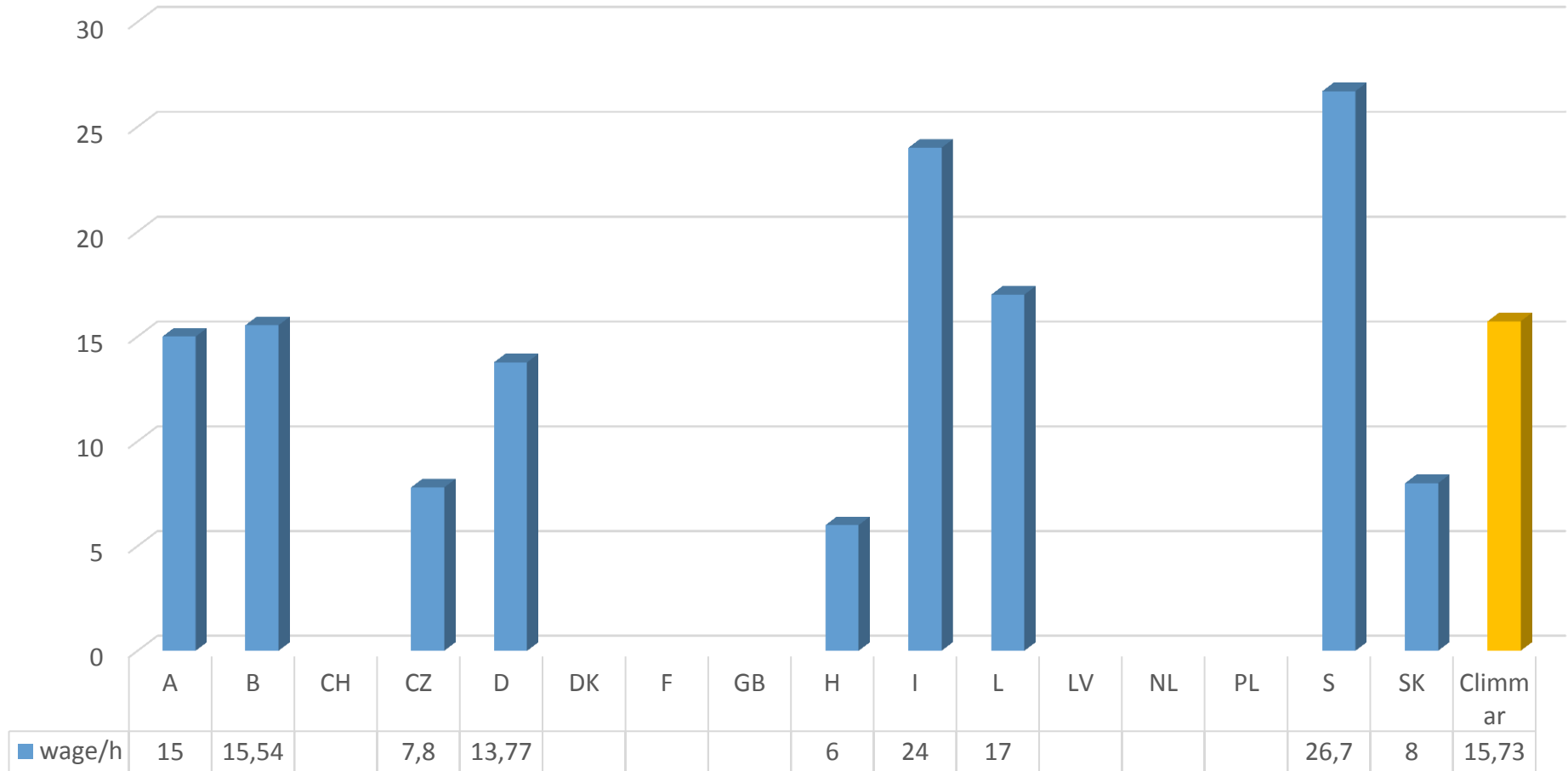
total:
2.919.000 €/comp.

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



Part III – Companies:

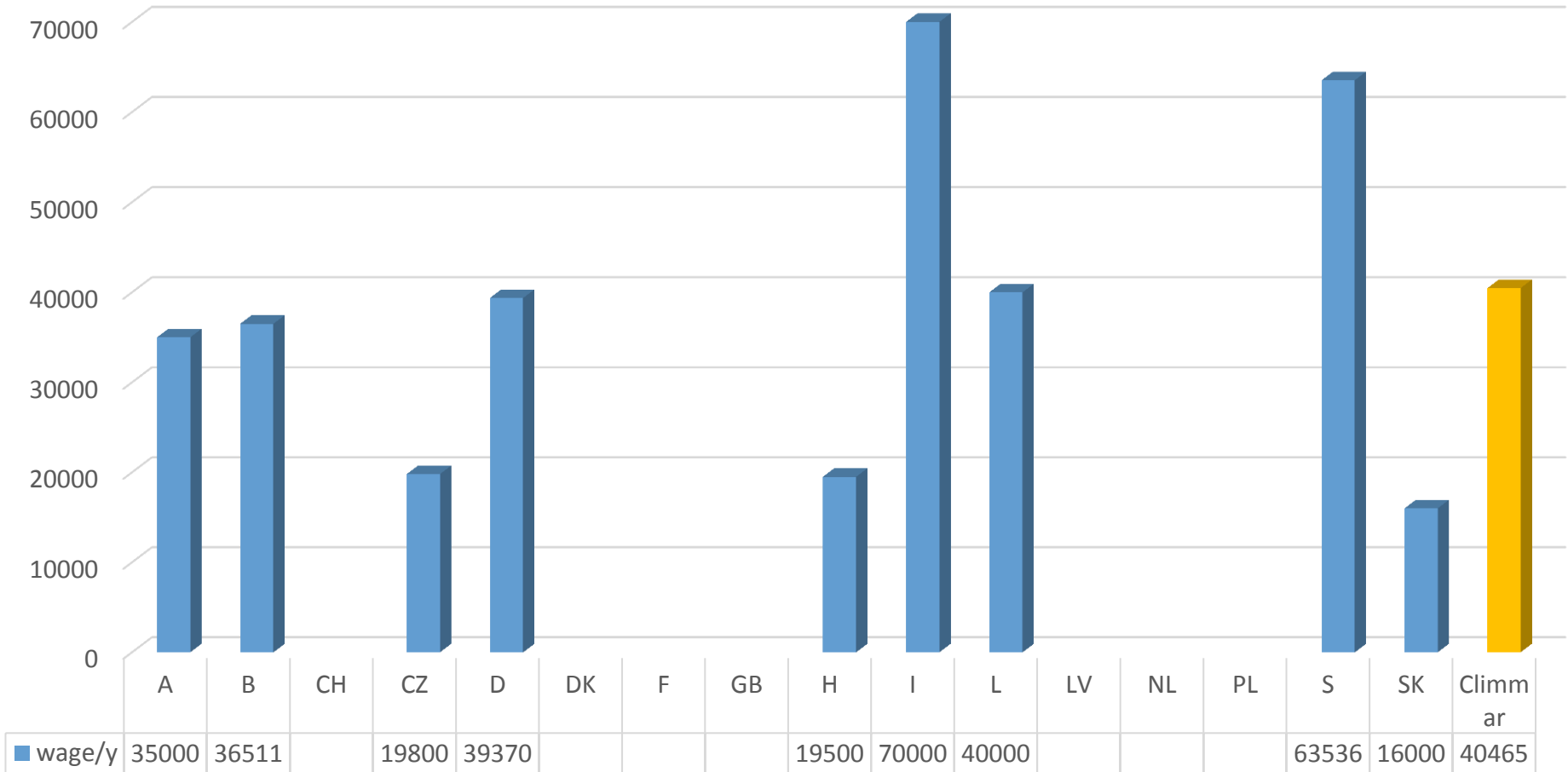
Wage per hour (average mechanic)





Part III – Companies:

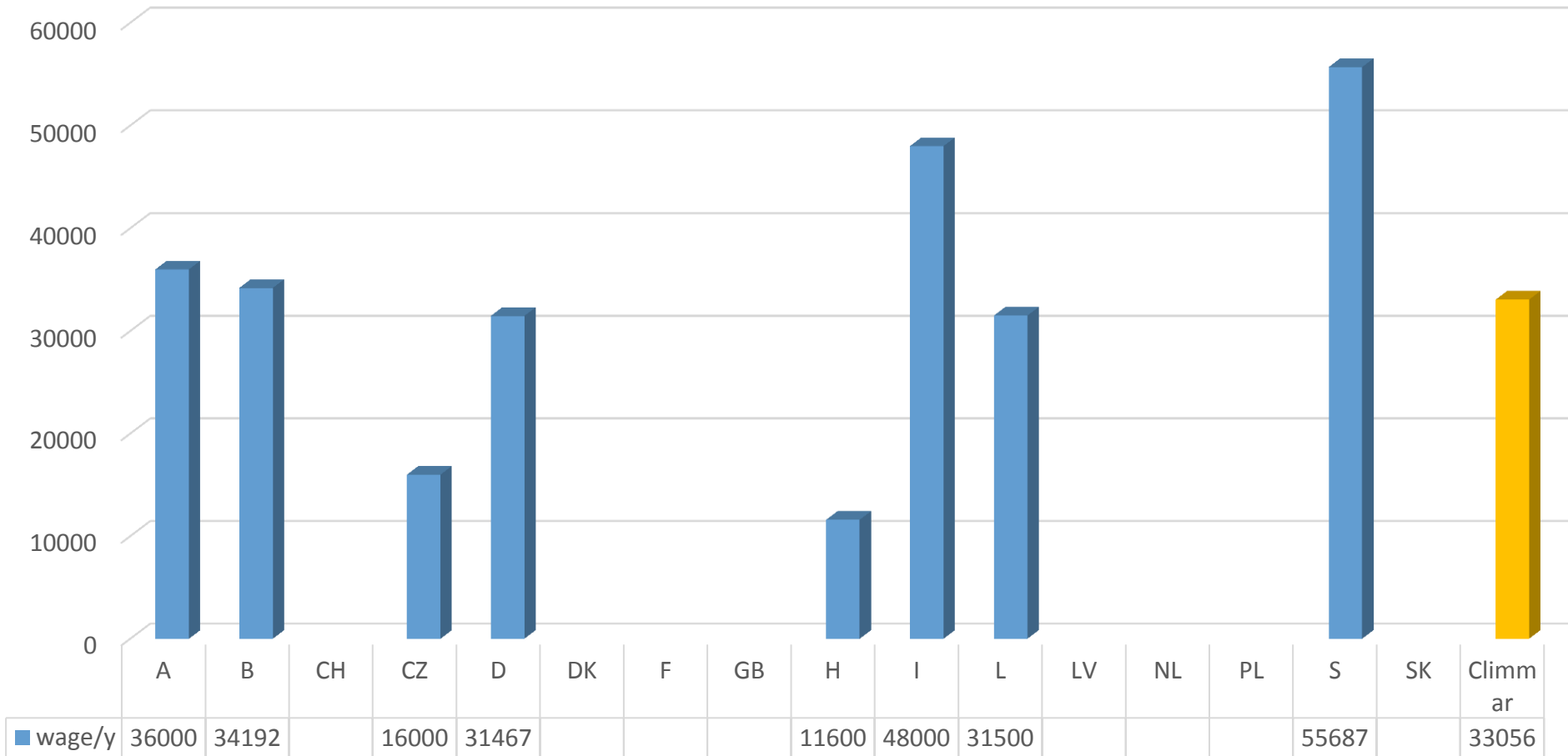
Wage per year (master)





Part III – Companies:

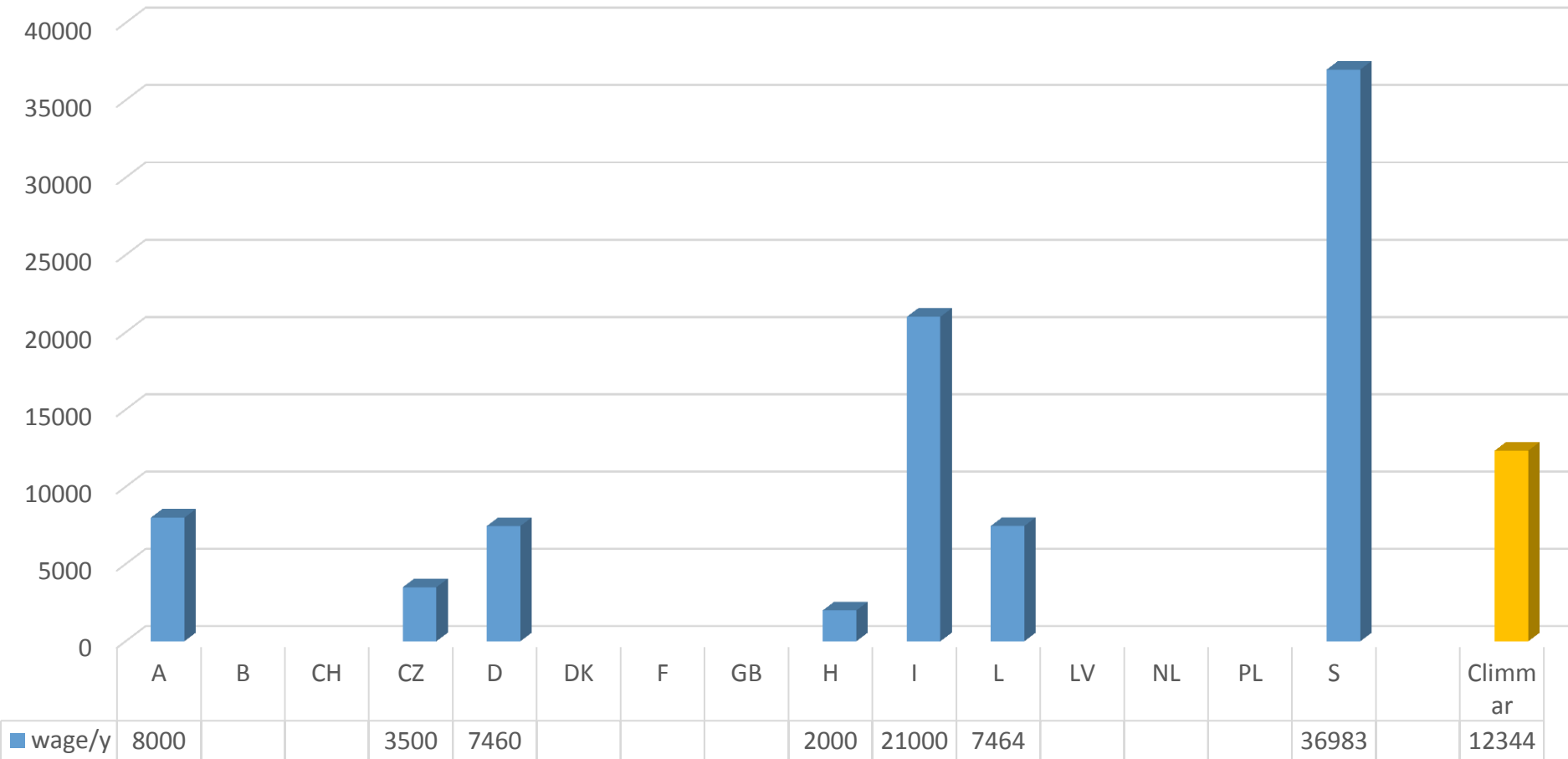
Wage per year (partsman)





Part III – Companies:

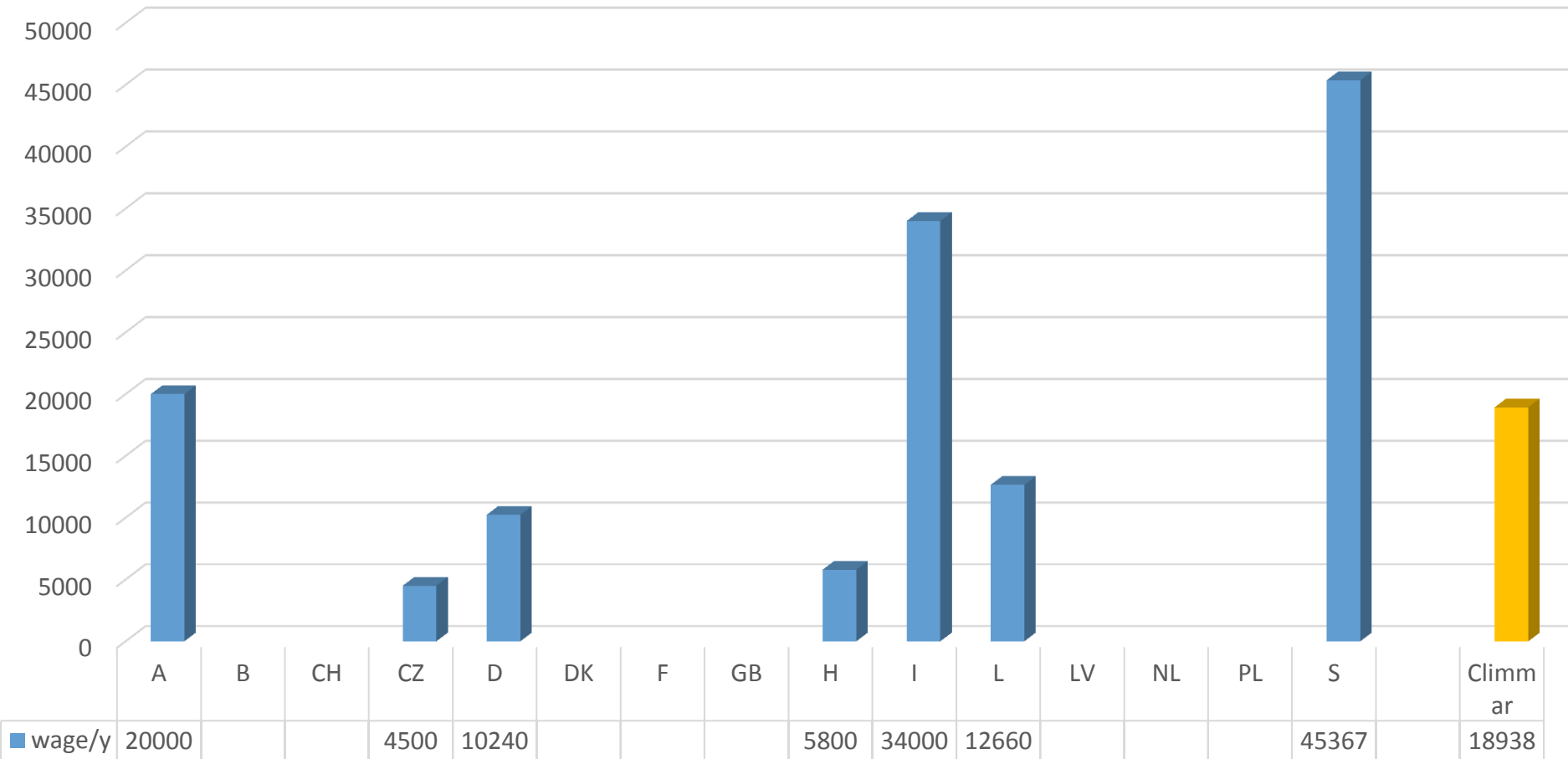
Wage per year (apprentice, 1st year)





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 –

available from which countries for which brands, 1st of Juli 2016

	A	B	CH	CZ	D	DK	F	GB	H	I	L	LV	NL	PL	S	SK
JD	x	x	x		x	x				x	x					
NH	x	x	x		x	x				x	x					
Claas	x	x	x		x	x				x						
MF	x	x	x		x	x				x	x					
SDF	x	x	x		x	x				x	x					x
Case	x	x	x		x	x					x					
Valtra	x		x		x	x					x					
Fendt	x	x	x		x	x					x					
Landini	x					x				x						
Kubota		x	x							x						
JCB					x						x					
Kuhn	x															
Pöttinger	x															
Krone	x															
Merlo																

Same / Deutz-Fahr								Amounts in CHF	
		A	B	D	DK	I	L	CH	SK
Working period calculation	Reference periods / actual periods	teils teils	Table of reference periods	Richtzeit	R=60%	the last 12 months	Richtzeit	Richtzeiten	table of reference period
Compensation	Wages / hour	31,-	€ 42,- Depending service level	33,5 bis 52,3 68 bis 100%	34% less than ext.	from 22€ until 38€ (depending on the evaluation center assistance)	65%	65.-	€ 25
	Inclusive diagnostic / setup period	ja	No	ja	yes	no	ja	Nein	no
	Components	nur vergütet	Price list less dealer discount (at express shipment)	Preisliste abz. Händlerrabatt	brt. minus 20%	5% of the price list	Preisliste - Händlerrabatt	Preisliste - Rabatt +10%	purchase price
	Outside services	100%	100%	100%	100%	100% (only documented)	100%(selten)	100%	max 50%
	Transport		No	frachtfrei	no	zero	0%	eingerechnet	no
Submission	Communications channel	Papier	EDP	online	own on line	online	Online	Online	online
	Closing date	14 Tage	30 days	30d	14 days after repair	max. 30 days after the reparation	30 Tage	30 Tage	30 days
	Credit time	1 MO	30 days	2 Wo bis 5 Mon.	no - special	each 15days	3-6 Monate	10 Tage	30 days
Arrangements for replacement machine	x	None (depends on situation)	keine	no	none	keine	keine	keine	none
Obligation to store old components	retour schicken	6 months after approval warranty	ja, bis Abnahme	6 months	yes (6 months after the reparation)	Ja, bis Abnahme durch technischen Dienst	bis Gutschrift	yes	
Standard goodwill arrangements		No	ja / nein	no - exeption	no	teilweise	Nein	up to 2 years or 2000 motor hours	
Changes to remuneration model within last 2 years		No	ja	12 months Italy built model, 24 months German built model	no	nein	Nein	no	
Extension of warranty for new machine	possible:		Yes, in option oil company a 2 to 5 years maintenance contract	über Versicherung	no	yes	Ja	Ja	no
	yes / no								
	conditions		Experts' check according conditions oil contract and maintenance contract	noch unbekannt	it depends on the specific warranty's conditions	Gratis	no		
Cost per year for the datasystem that is needed for technical		800€/year	750 bis 1500 /a	€ 1.597,86 /a + equipment	950,00 € /each year	950,- Eur	1'500.-	500€/ year	



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!