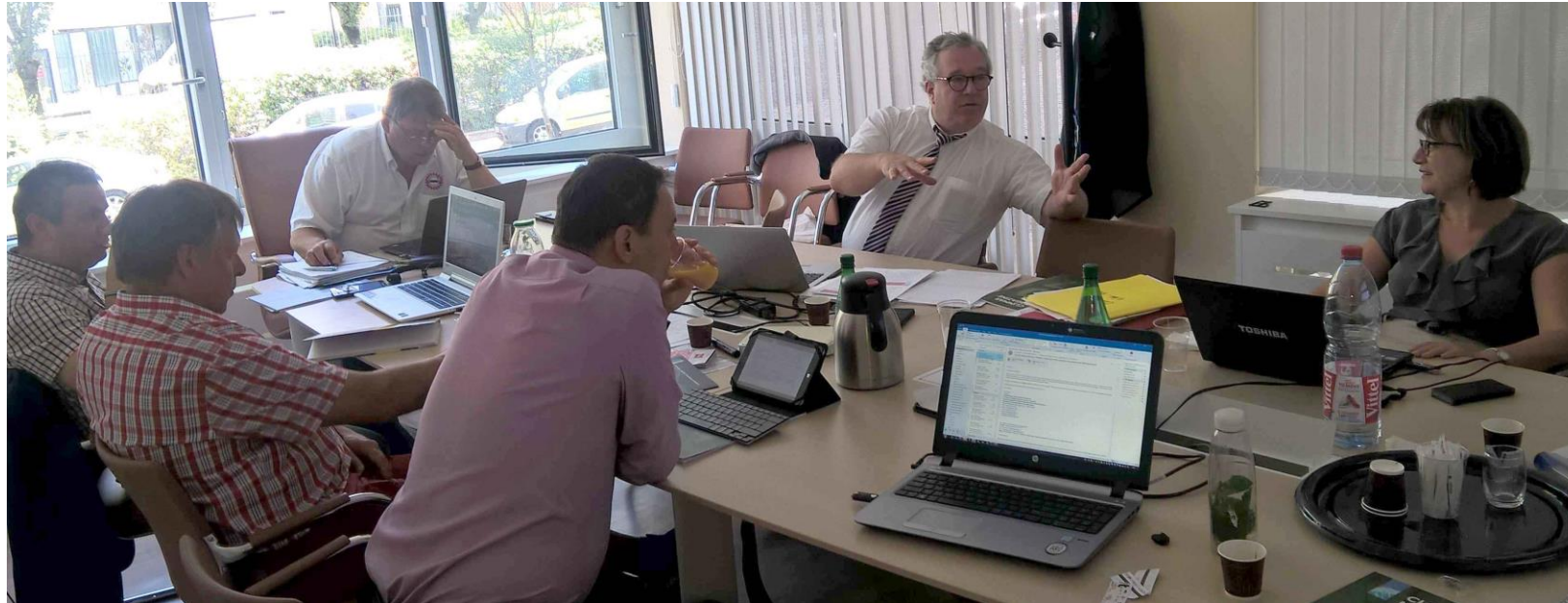




CLIMMAR Branch Report 2017

presented by **Projectteam 2: Data and Surveys**



Chairman: Ulf Kopplin, Vicepresident CLIMMAR



Survey 2017 results:

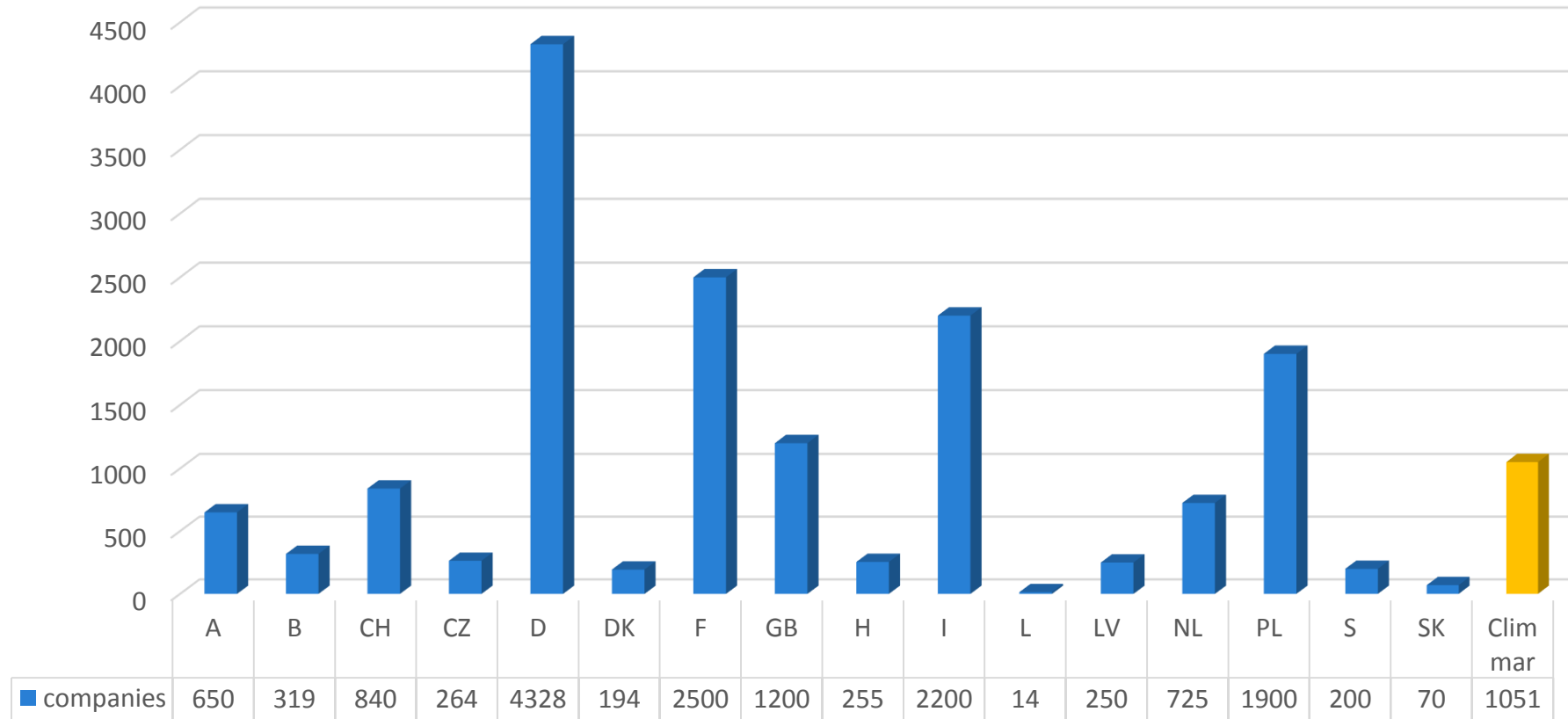
- National branch view - **markets & structures**
- National Branch view - current situation: **trends**
- Dealers view - **companies averages**
- Dealers view - **warranty conditions**



National Markets and Structures:

Number of Companies:

15.800 Dealers (incl. satellites) & Servicefirms

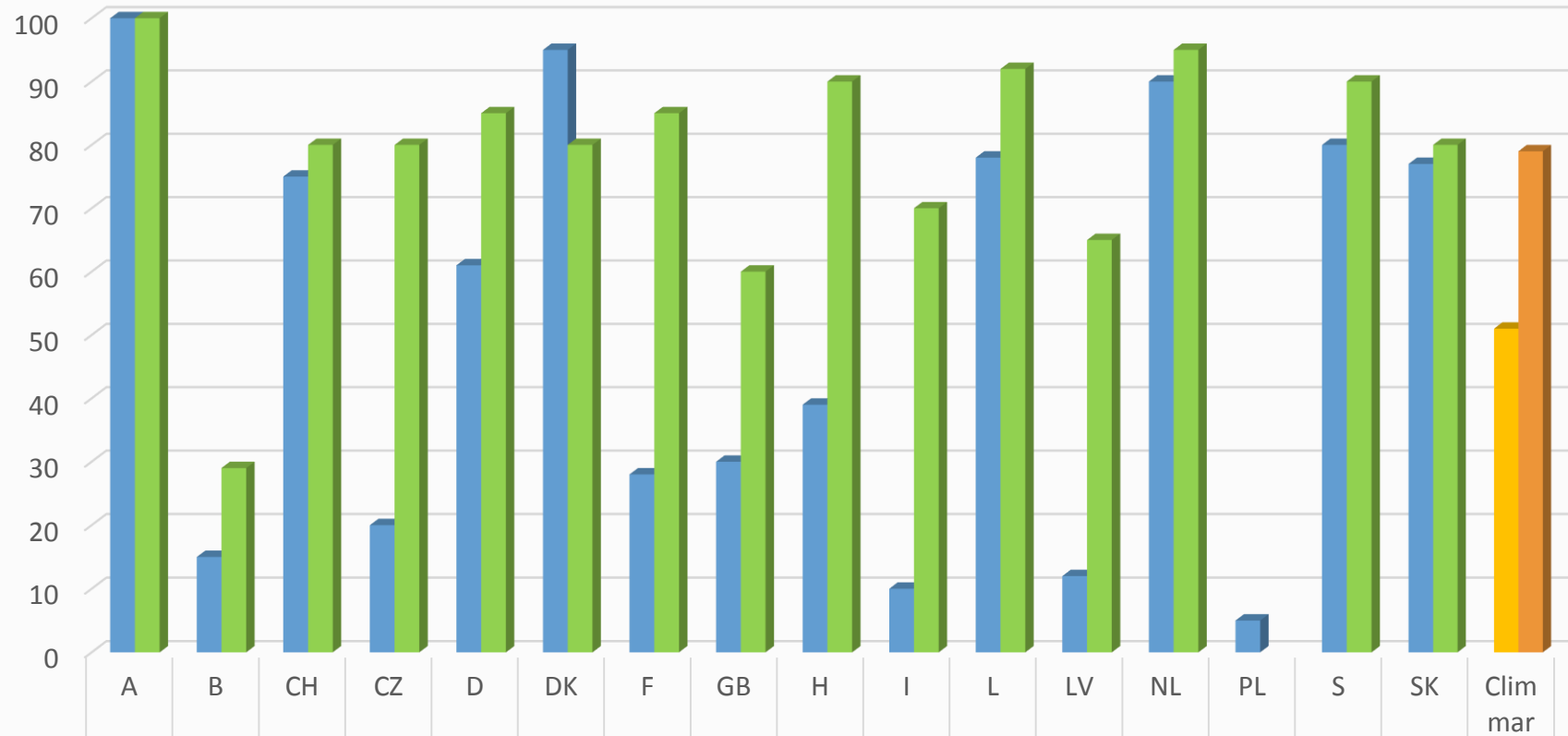


Source: CLIMMAR



National Markets and Structures:

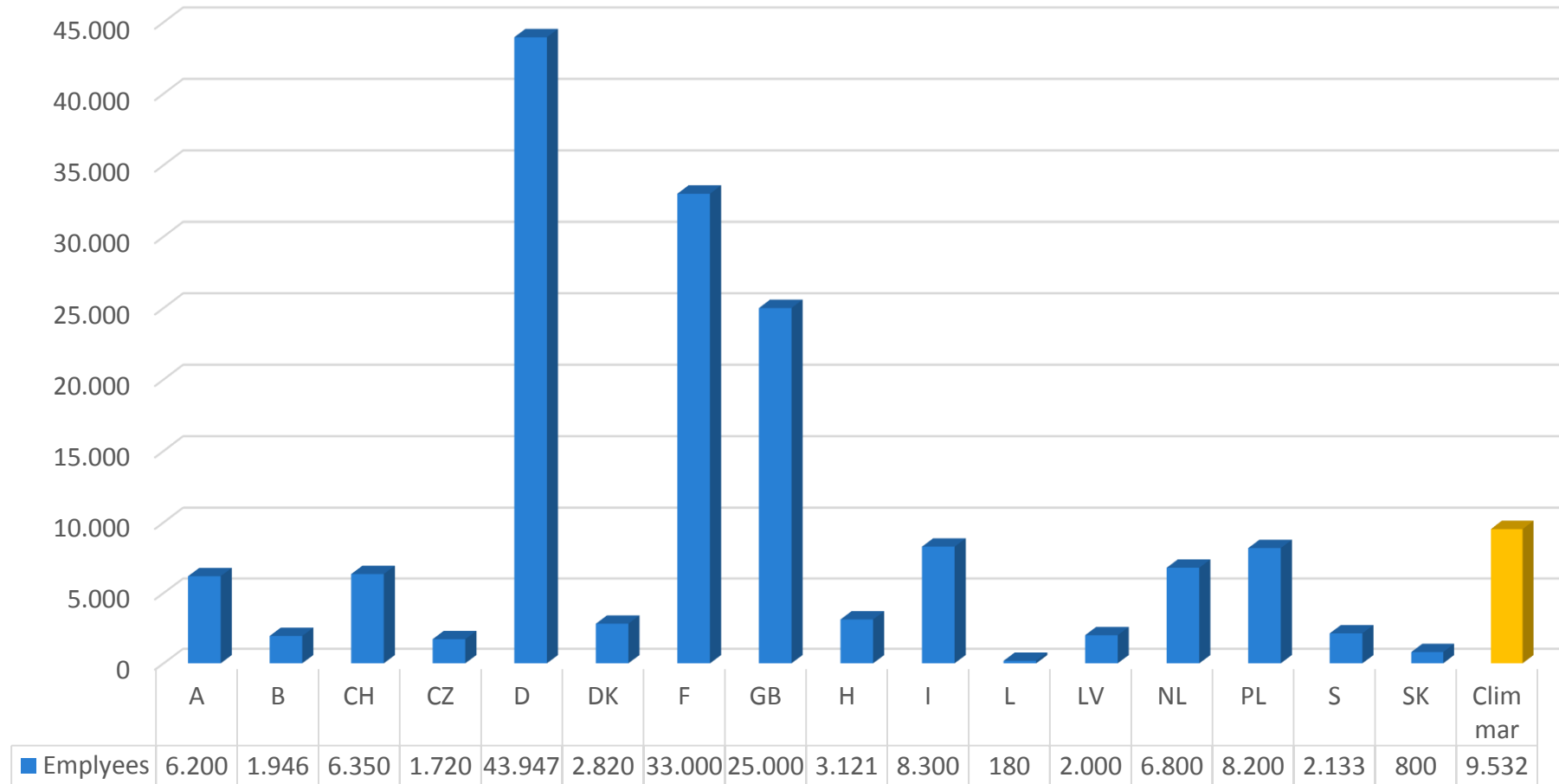
organisation level:



source: CLIMMAR



National Markets and Structures: more than 150.000 Employees

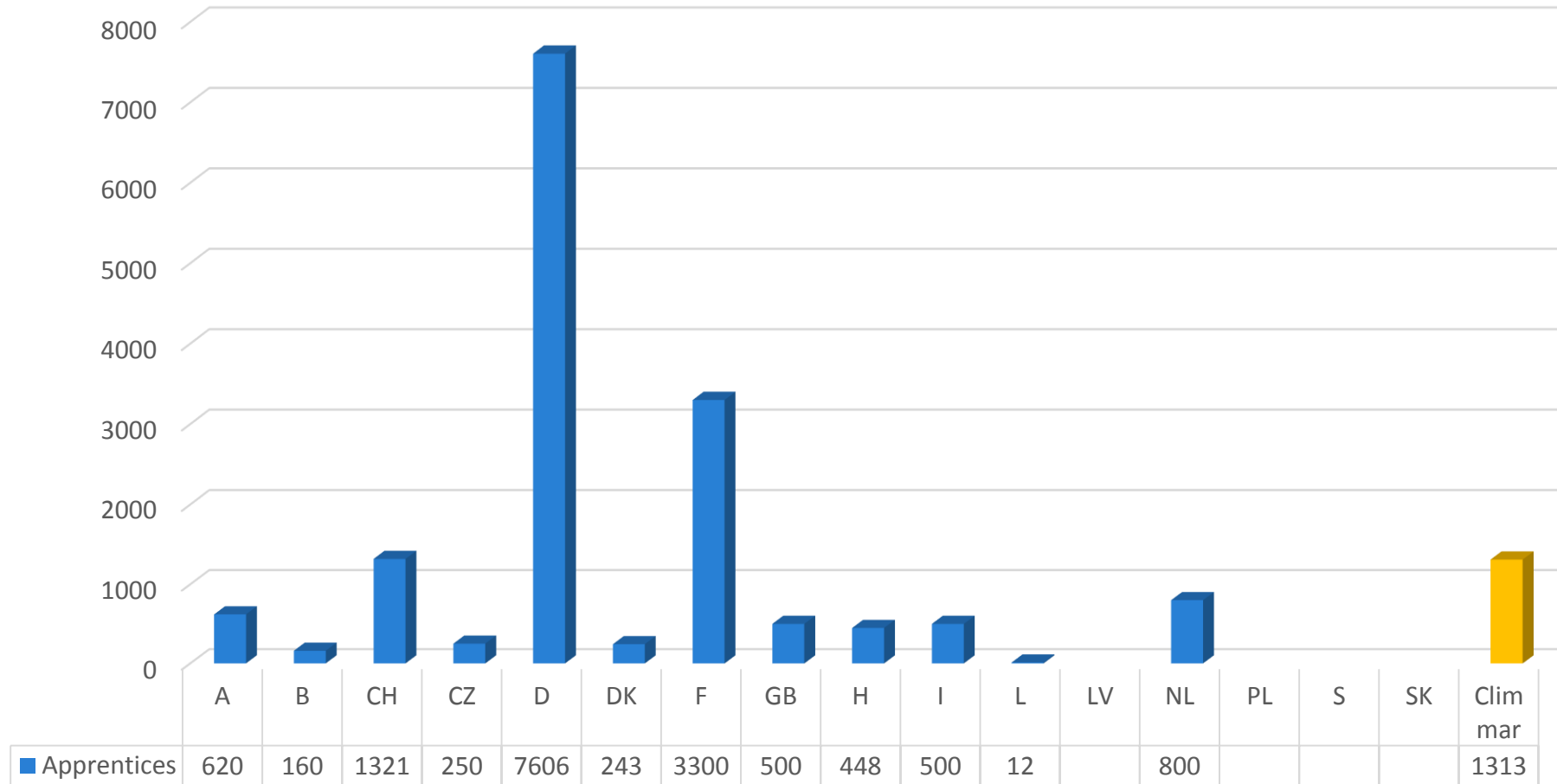


Source: CLIMMAR



National Markets and Structures:

near to **16.000 Apprentices**

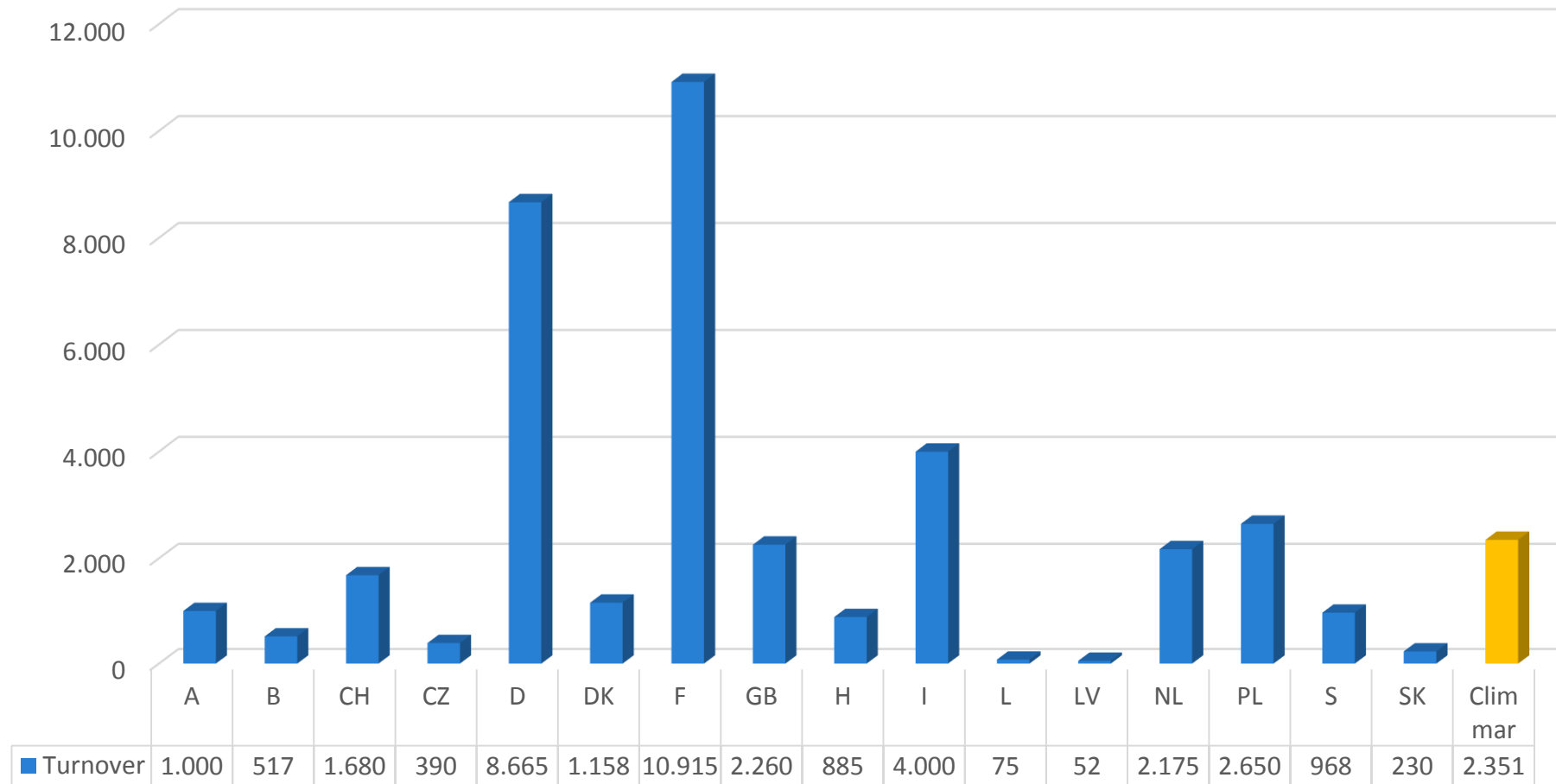


Source: CLIMMAR



National Markets and Structures:

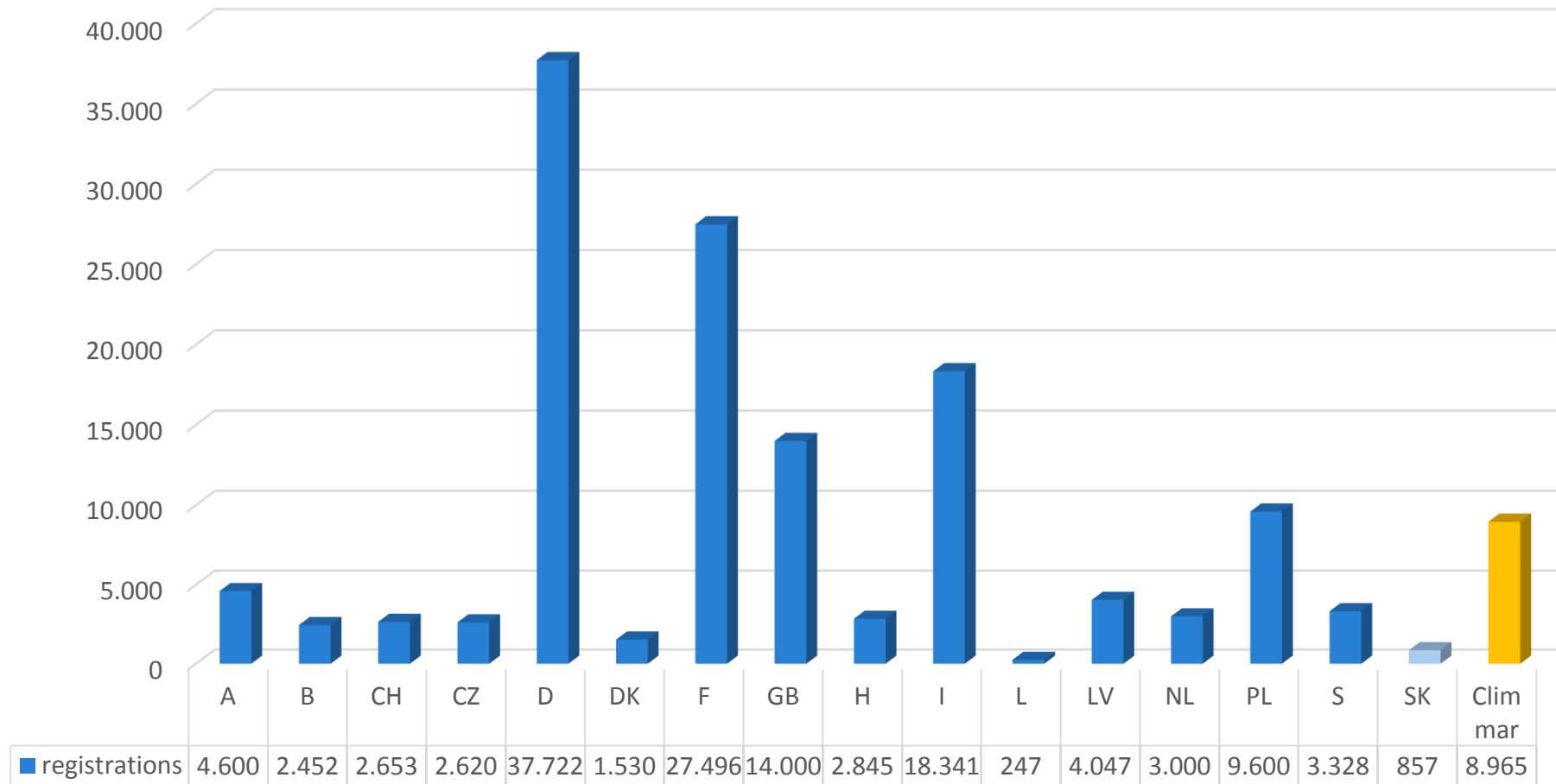
Turnover (in 1.000 €): **37.500**



Source: CLIMMAR



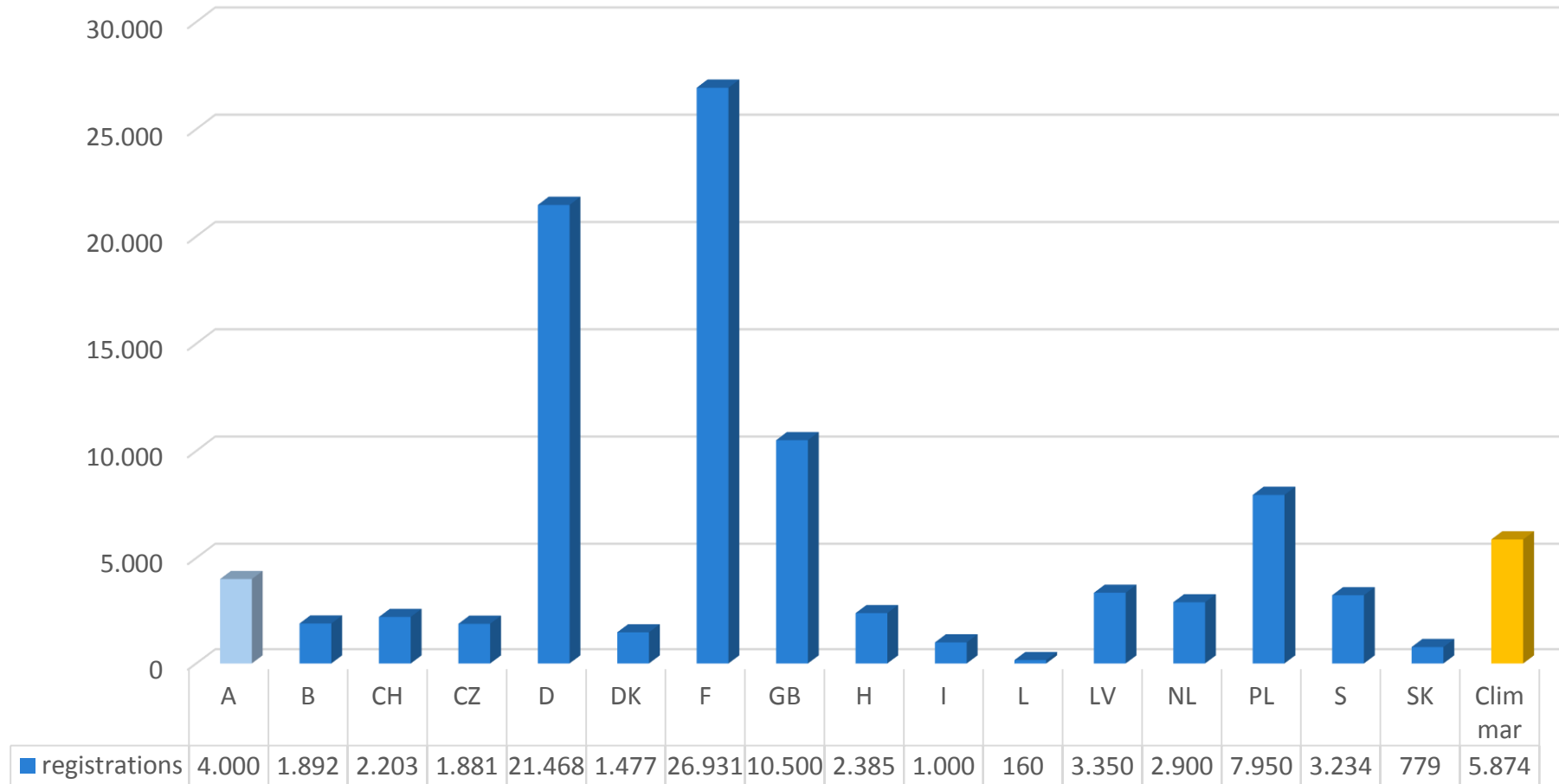
National Markets and Structures: Tractor Sales



Source: CLIMMAR



National Markets and Structures: Tractor Sales (50 hP or more)

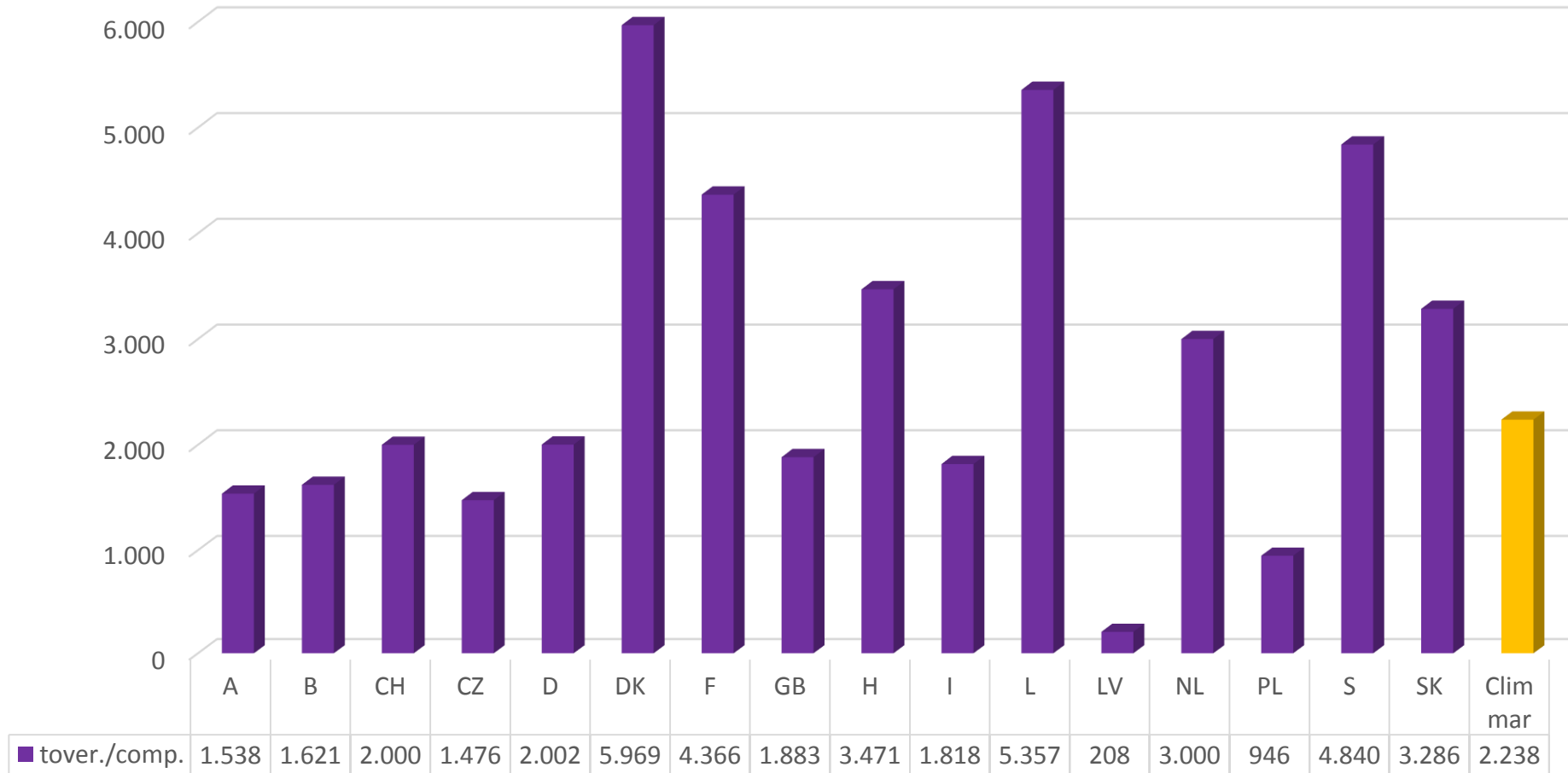


Source: CLIMMAR



National Markets and Structures:

relations: Turnover per Company

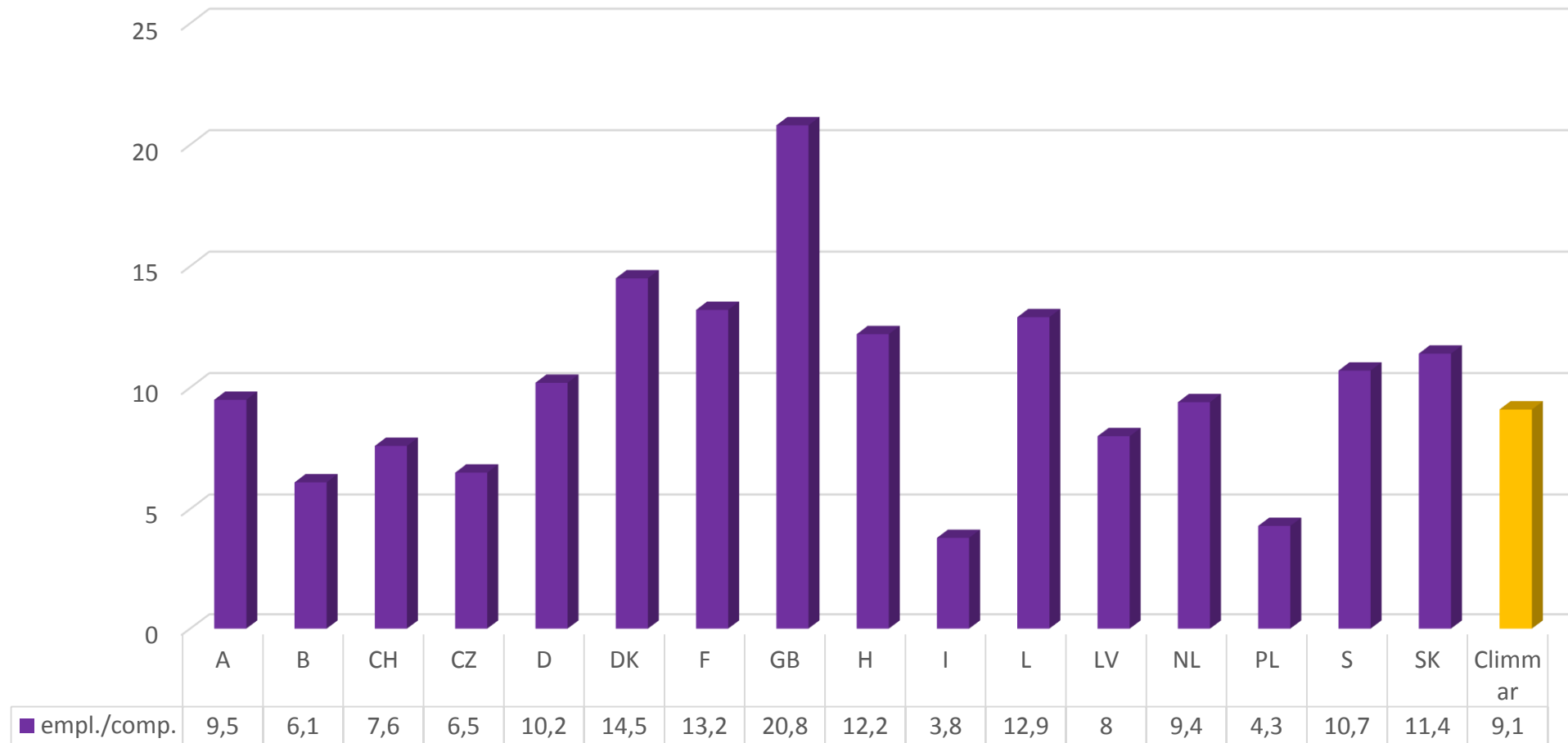


Source: CLIMMAR



National Markets and Structures:

relations: Employees per Company

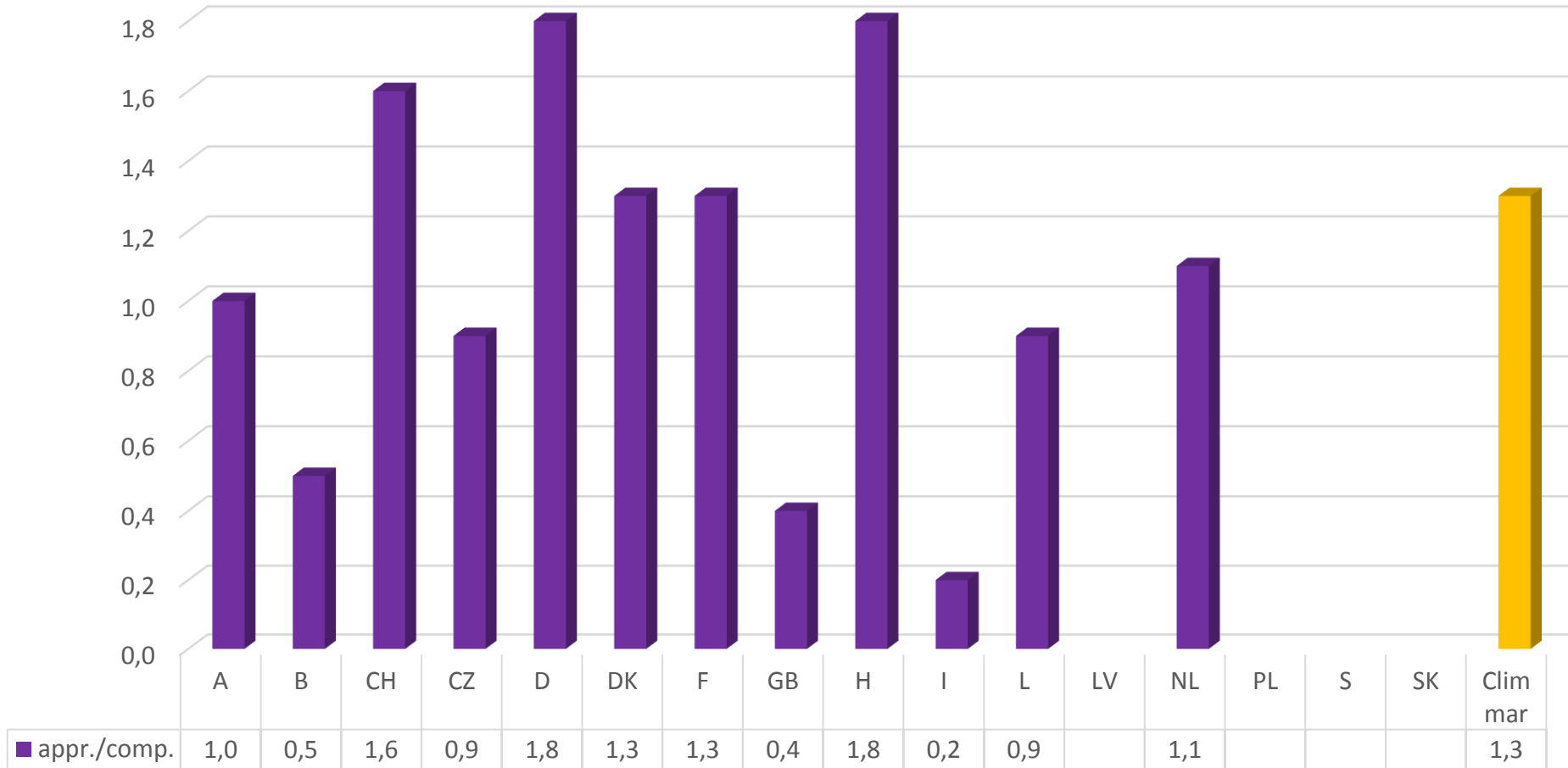


Source: CLIMMAR



National Markets and Structures:

relations: Apprentices per Company

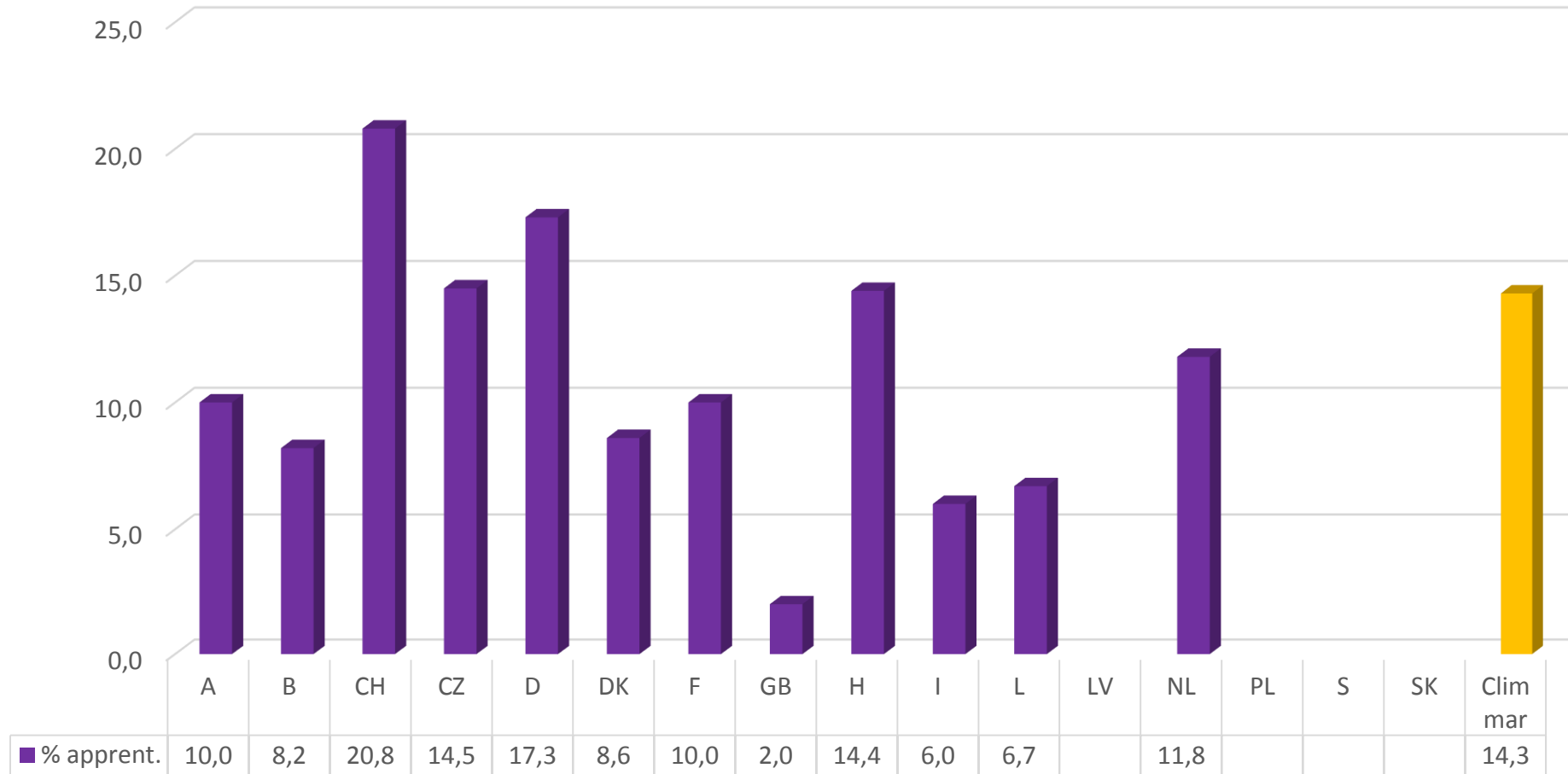


Source: CLIMMAR



National Markets and Structures:

relations: % Apprentices (of Employees)

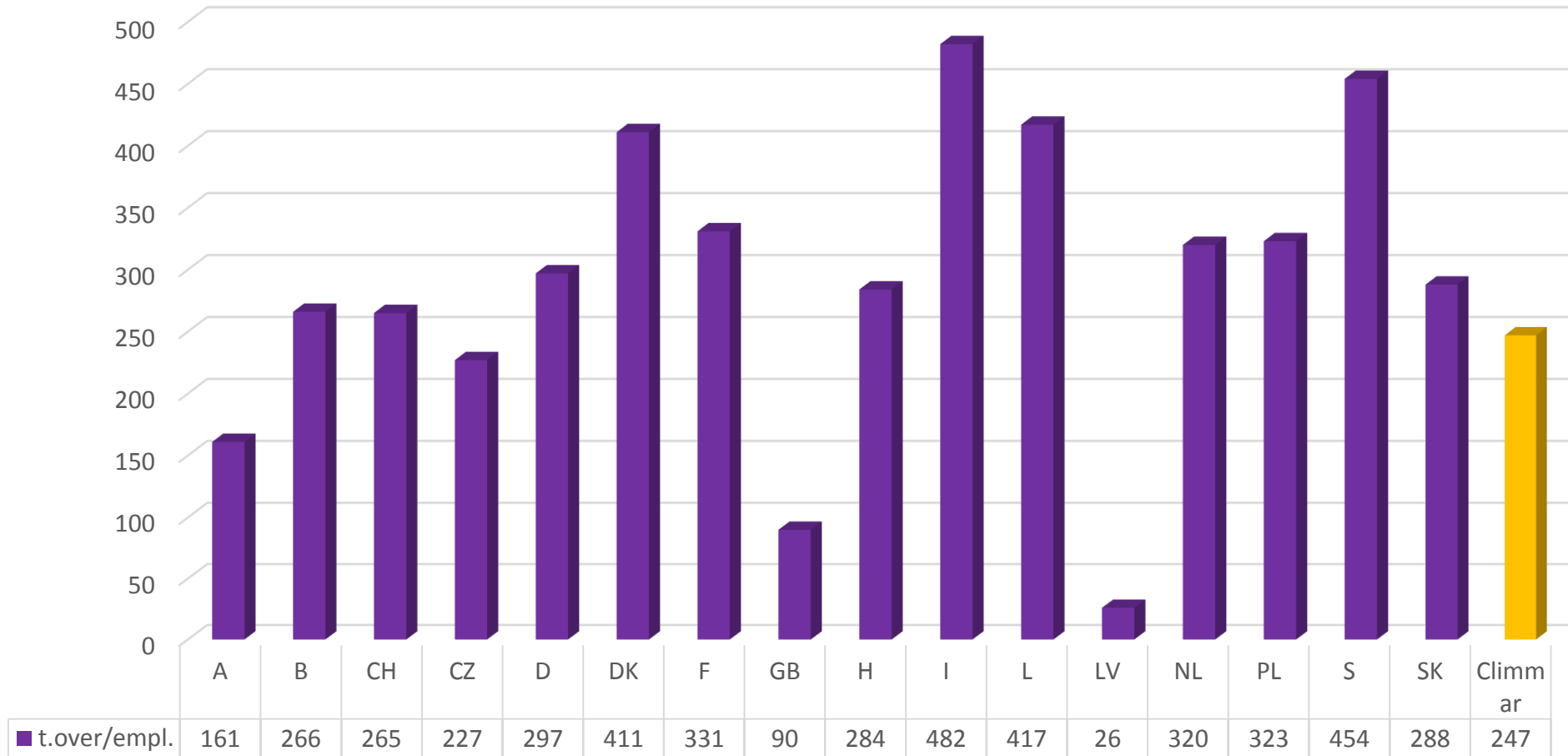


Source: CLIMMAR



National Markets and Structures:

relations: Turnover per Employee

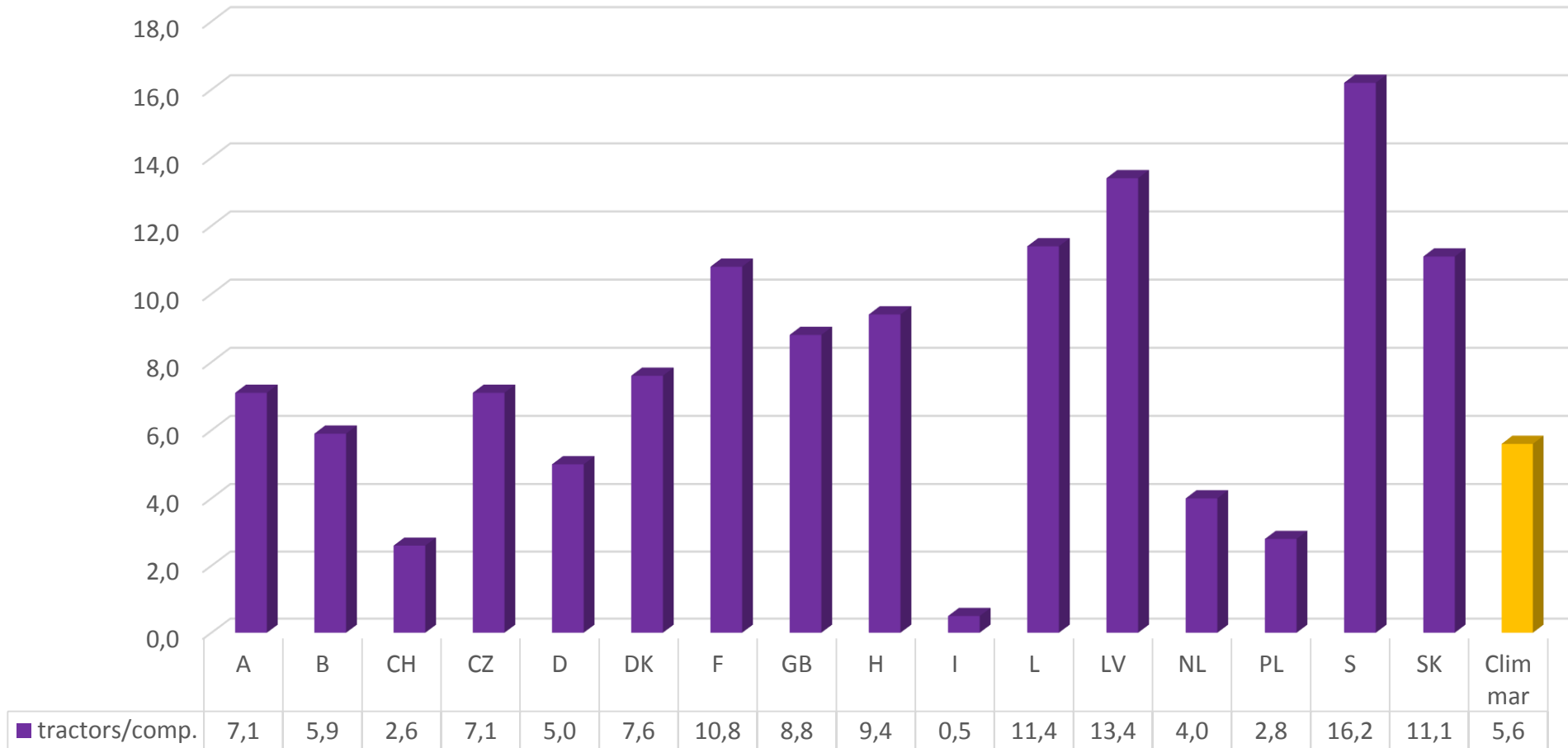


Source: CLIMMAR



National Markets and Structures:

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

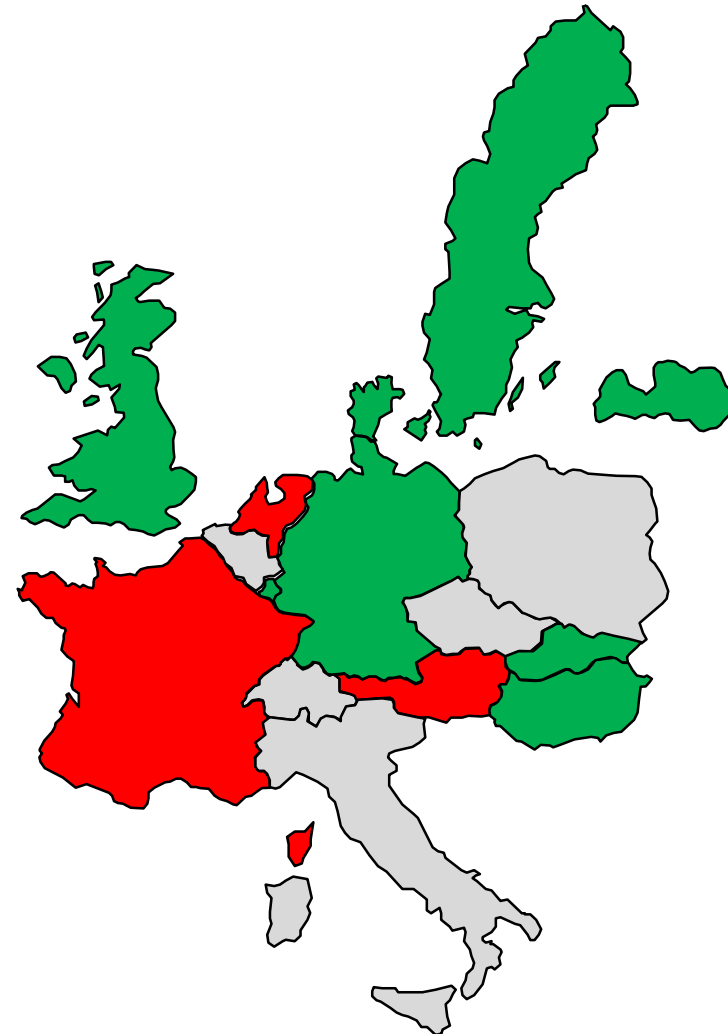


Source: CLIMMAR



Part II - Trends:

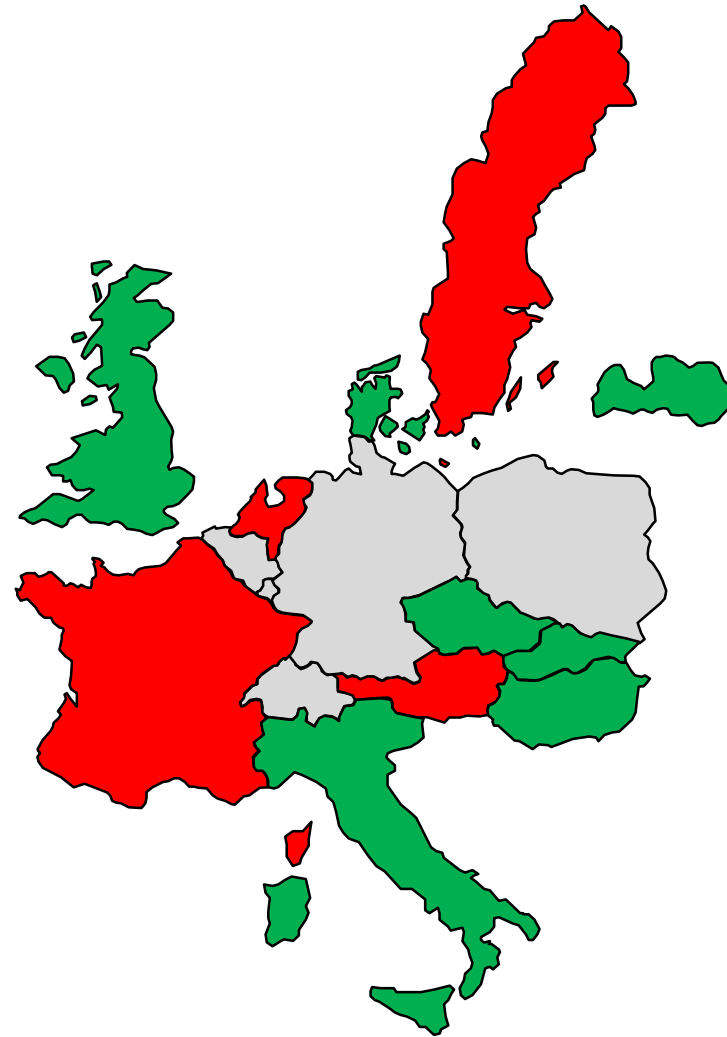
I. Comparison to same period last year: January - June 2017				
		- (minus / worse)	= (equal)	+ (plus / better)
A.	Turnover total	A, F, NL	B, CH, CZ, I, PL, S	D, DK, H, L, LV, SK, UK
A.I	Turnover Machinery	A, F, NL	B, CH, D, PL, S	CZ, DK, H, I, L, LV, SK, UK
A.I.1	New machinery	A, F, NL, S	B, CH, D, L, PL	CZ, D, DK, H, I, LV, SK, UK
A.I.2	Second hand	NL	A, B, CH, CZ, F, LV	D, DK, H, I, L, PL, S, SK, UK
A.II	Turnover Workshop	NL	A, B, CH, H, I, LV, UK	CZ, D, DK, F, L, PL, S, SK
A.III	Turnover Spare Parts	NL	CZ, CH, DK, I, LV, S	A, B, D, F, H, L, PL, SK, UK
B.	Costs		A, CZ, F, NL, PL, UK	B, CH, D, DK, H, I, L, LV, S, SK
C.	Employees		A, B, CH, CZ, D, I, LV, NL, PL, S, UK	DK, F, H, L, SK
E.	Stock	D, F, UK	A, B, CH, CZ, H, I, L, NL, S	DK, LV, PL, SK
F.	Investments	A, I	CH, CZ, D, DK, F, NL, PL, S, SK	B, H, L, UK



Turnover total




development of turnover in the first half of 2017 compared with the same period 2016:

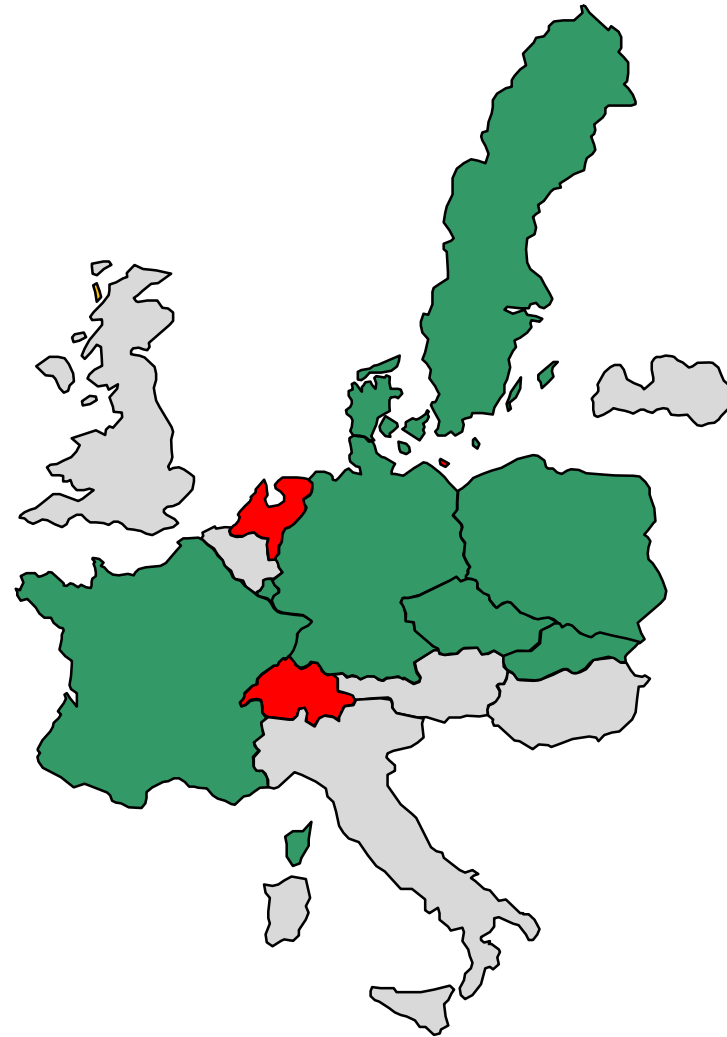
- less / worse / decrease
- equal
- more / growing / increase



Turnover new equipment

development of turnover in the first half of 2017 compared with the same period 2016:

-  less / worse / decrease
-  equal
-  more / growing / increase



Turnover workshop

development of turnover in the first half of 2017 compared with the same period 2016:

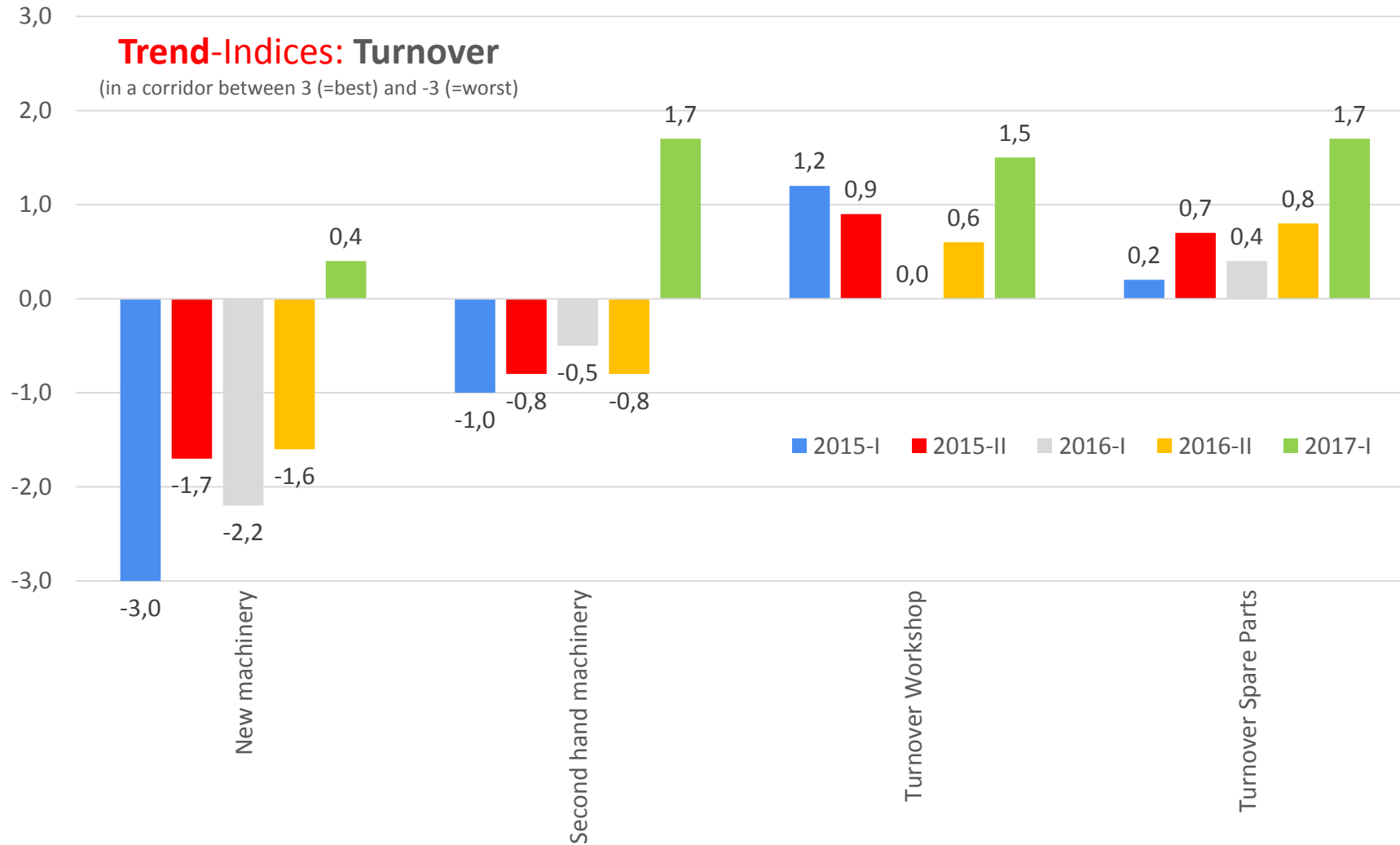
- less / worse / decrease
- equal
- more / growing / increase
- open

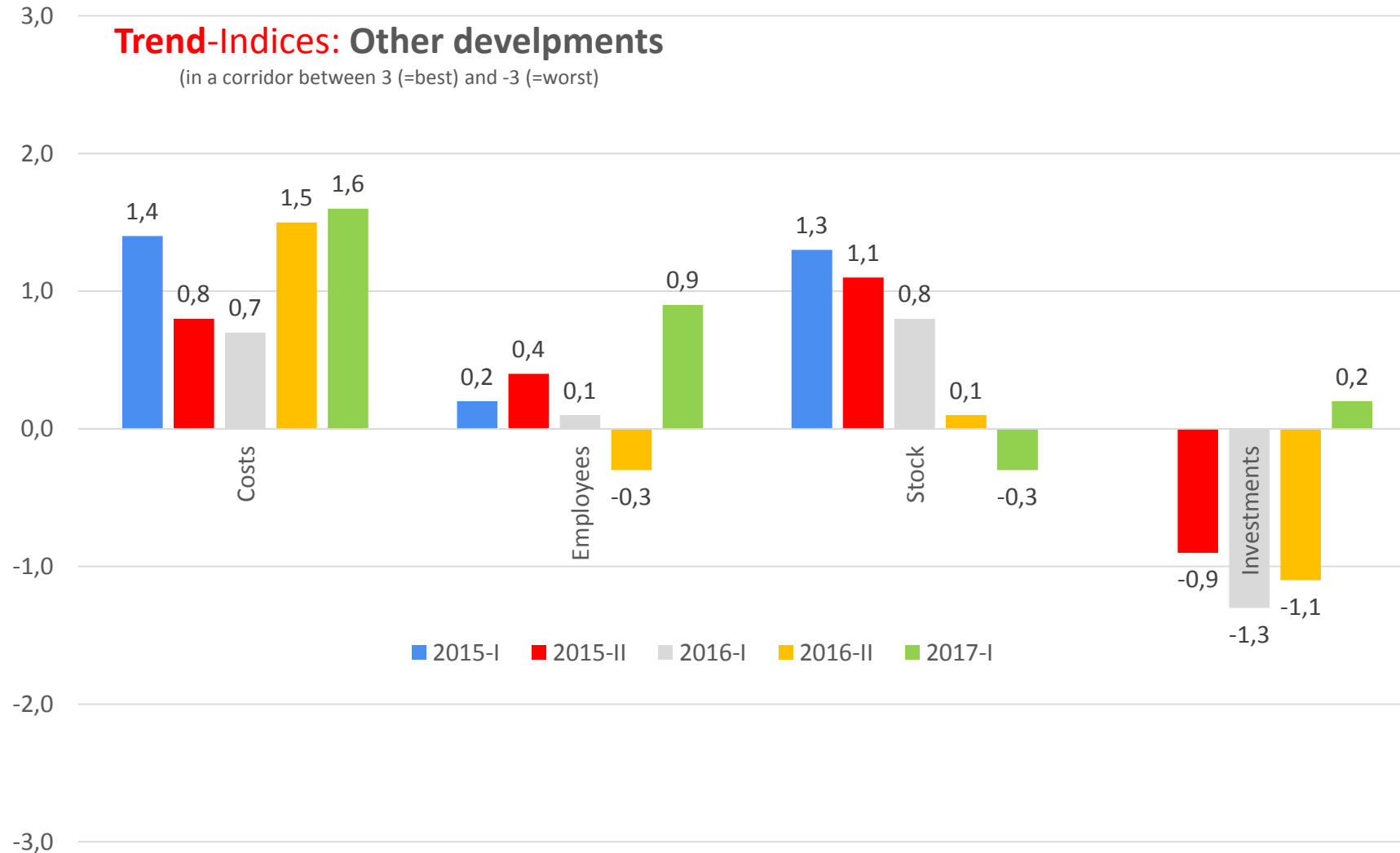


Turnover spareparts

development of turnover in
the first half of 2017
compared with the same
period 2016:

- less / worse / decrease
- equal
- more / growing / increase
- open

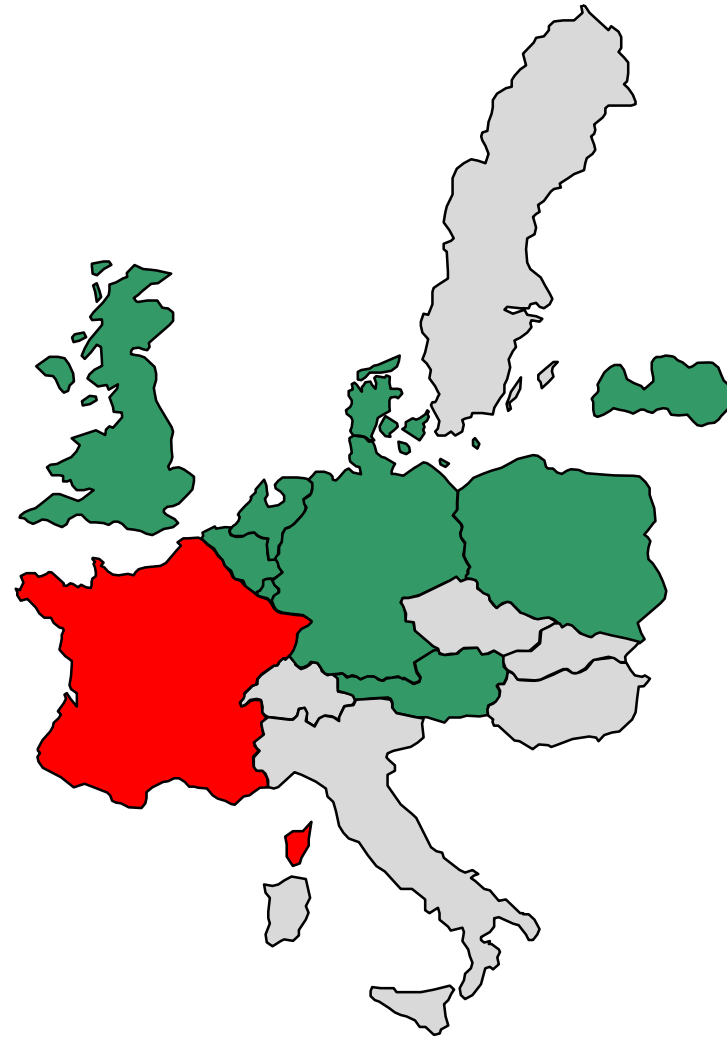









Part II - Trends:

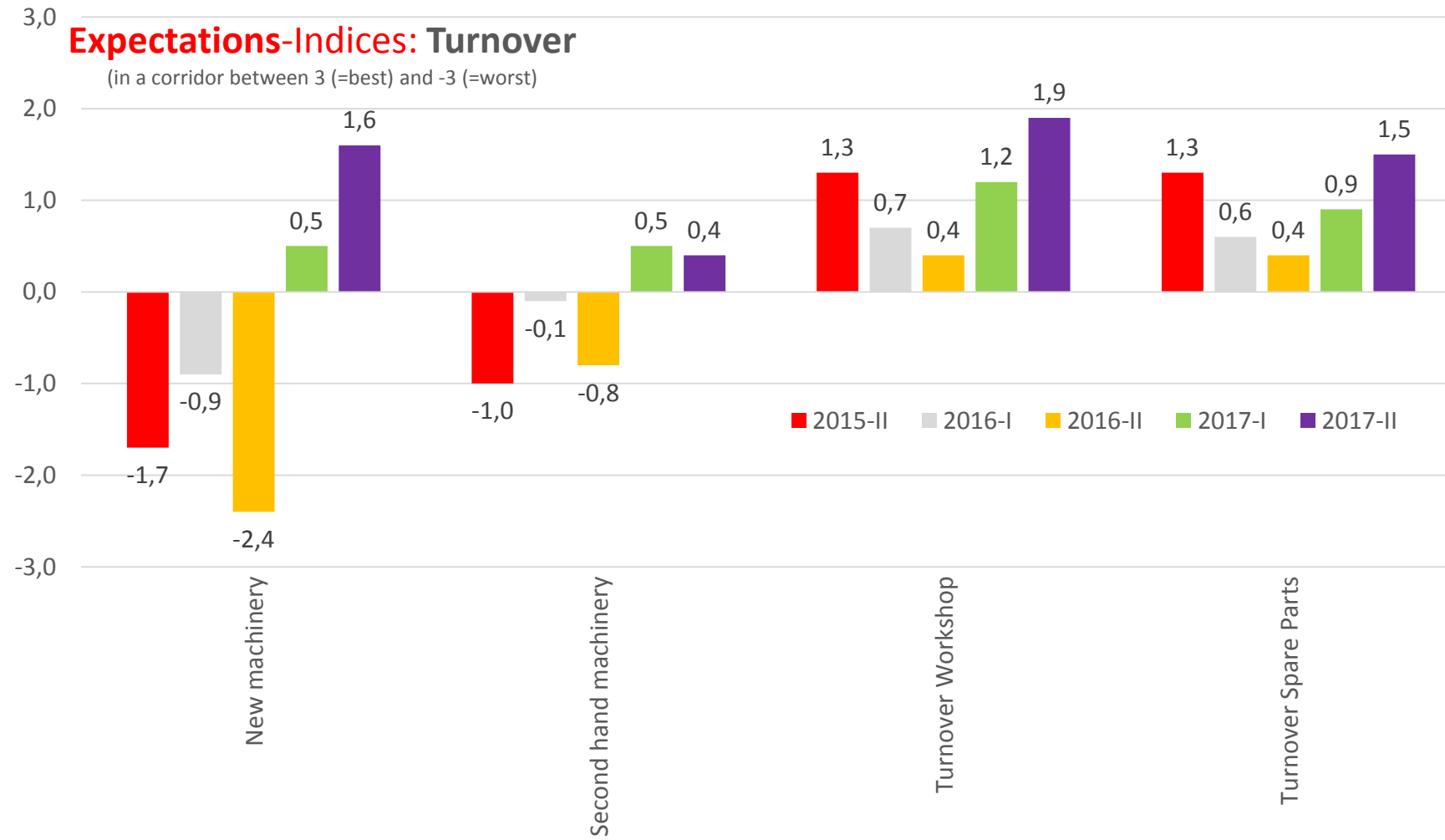
. Expectation for the following quarter: July - December 2017				
		- (minus / worse)	= (equal)	+ (plus / better)
A.	Turnover total	F	CH, CZ, H, I, S, SK	A, B, D, DK, L, LV, NL, PL, UK
A.I	Turnover Machinery	F, S	CH, H, SK	A, B, CZ, D, DK, I, L, LV, NL, PL, UK
A.I.1	New machinery	F, S	CH, H, L, SK	A, B, CZ, D, DK, I, LV, NL, PL, UK
A.I.2	Second hand machinery	A, H	CZ, D, F, I, LV, NL, S, SK, UK	B, CH, DK, L, PL
A.II	Turnover Workshop		A, CH, DK, H, S, SK, UK	B, CZ, D, F, I, L, LV, NL, PL
A.III	Turnover Spare parts		A, CH, CZ, DK, H, I, S, SK, UK	B, D, F, L, LV, NL, PL
B.	Costs	F	A, CZ, DK, I, PL, S, SK	B, CH, D, H, L, LV, NL, UK
C.	Employees		A, B, CH, CZ, D, H, I, L, LV, NL, PL, S, UK	DK, F, SK
E.	Stock	F, I, L, UK	A, B, CH, CZ, D, DK, H, LV, NL, PL, S, SK	
F.	Investments	A, I	CH, CZ, D, DK, F, H, S, SK, UK	B

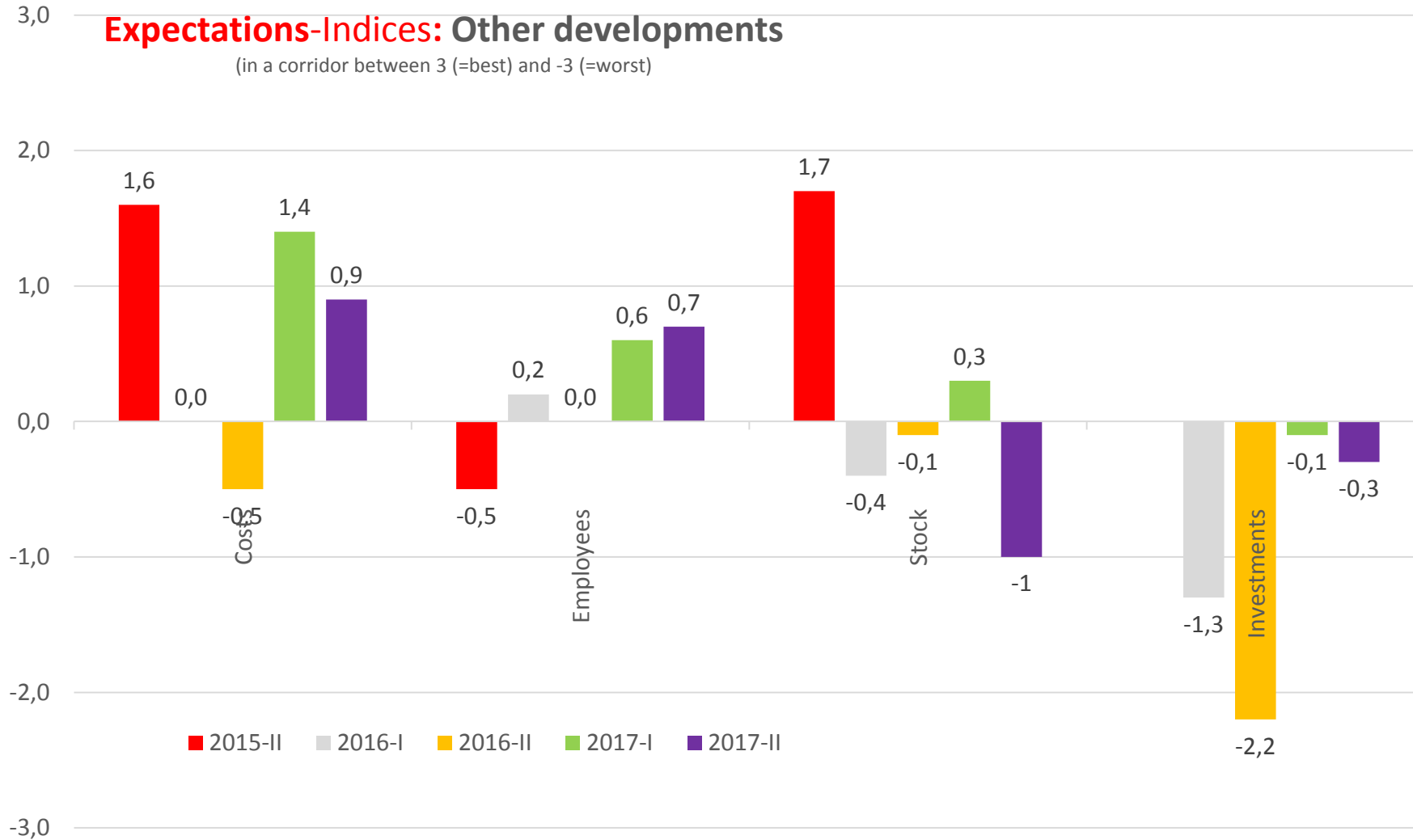


Turnover total

Expectations for the current half of 2017

-  less / worse / decrease
-  equal
-  more / growing / increase

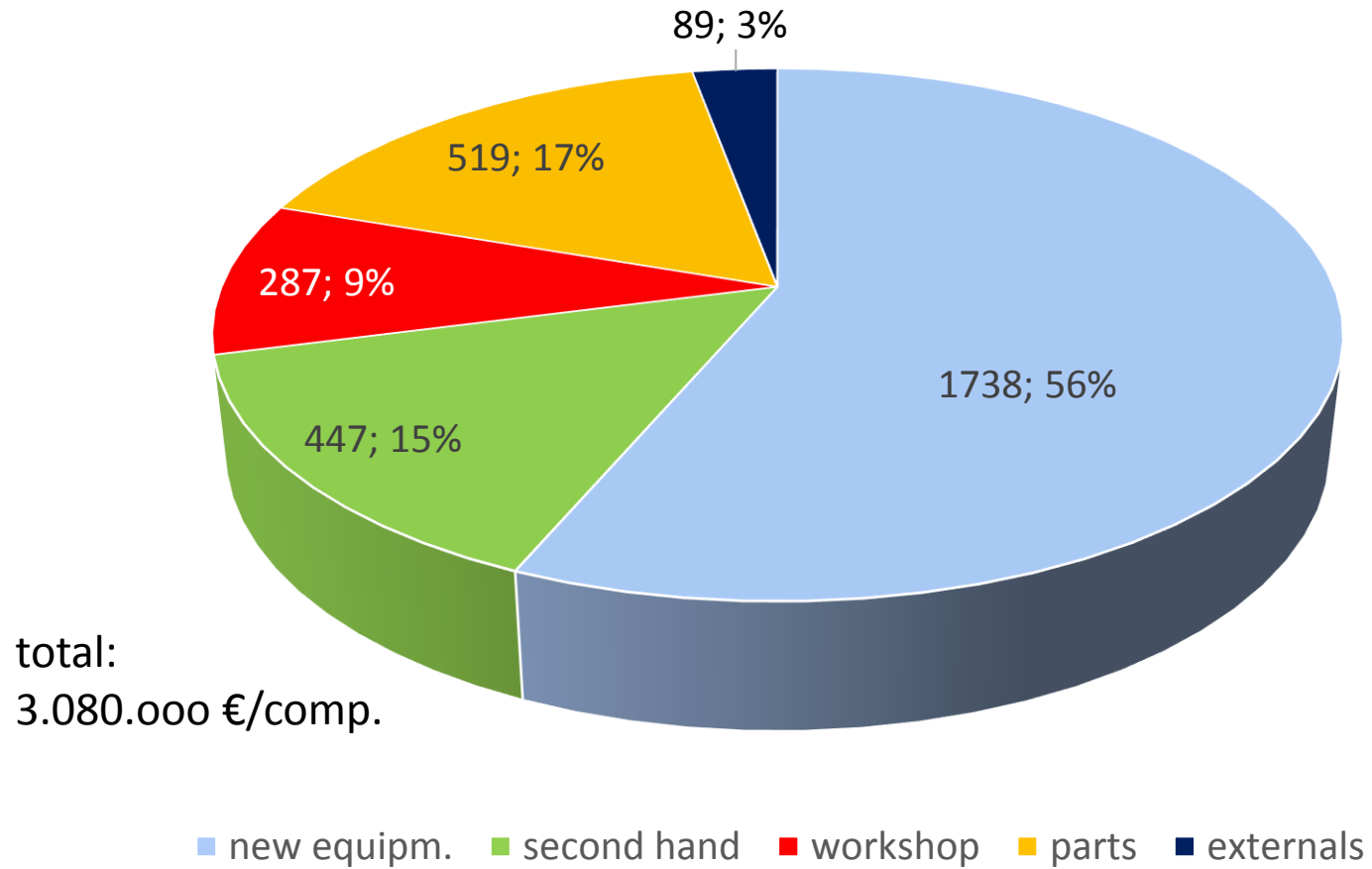






Part III - Companies:

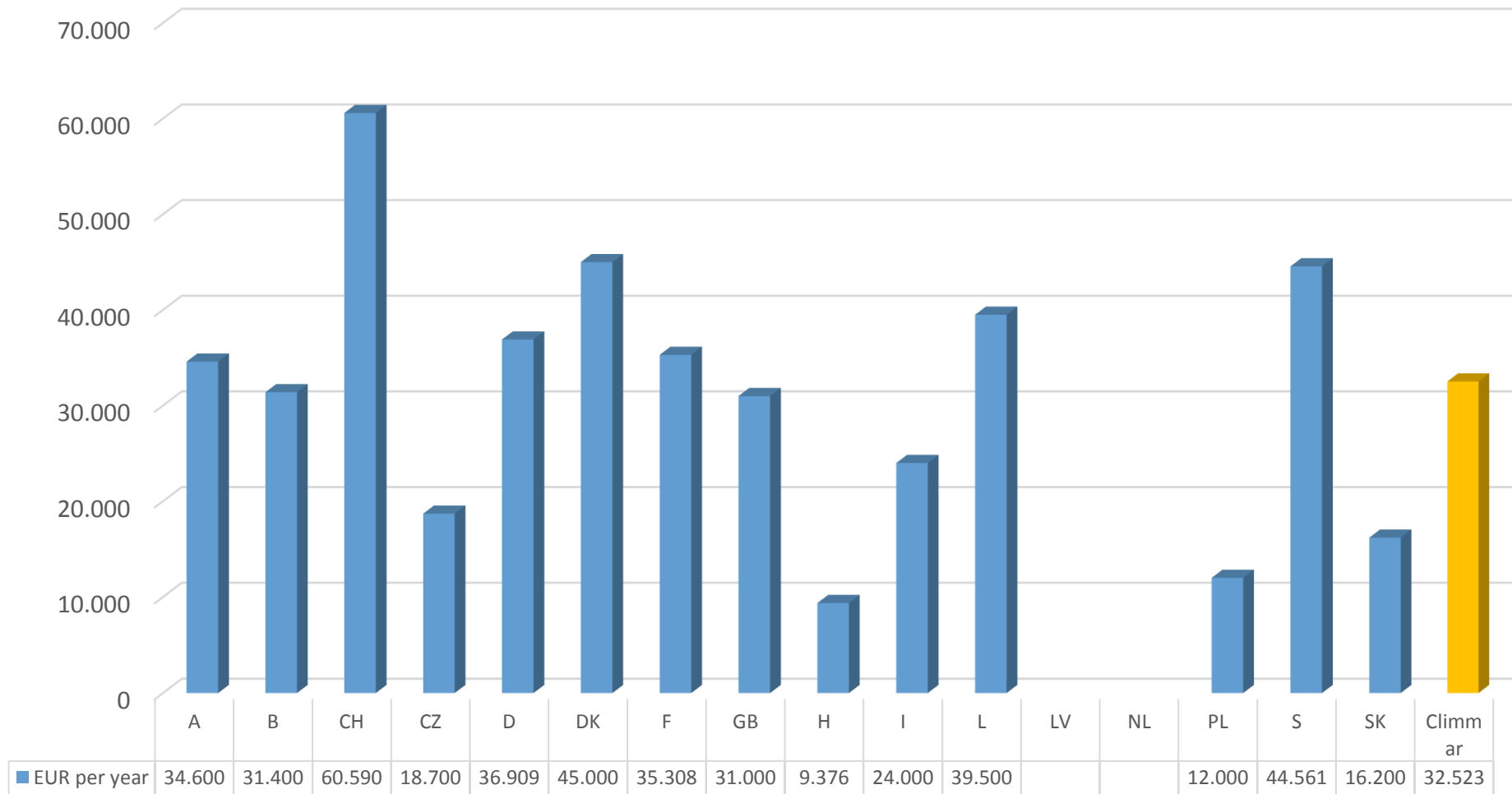
turnover-structure of the average CLIMMAR-dealer





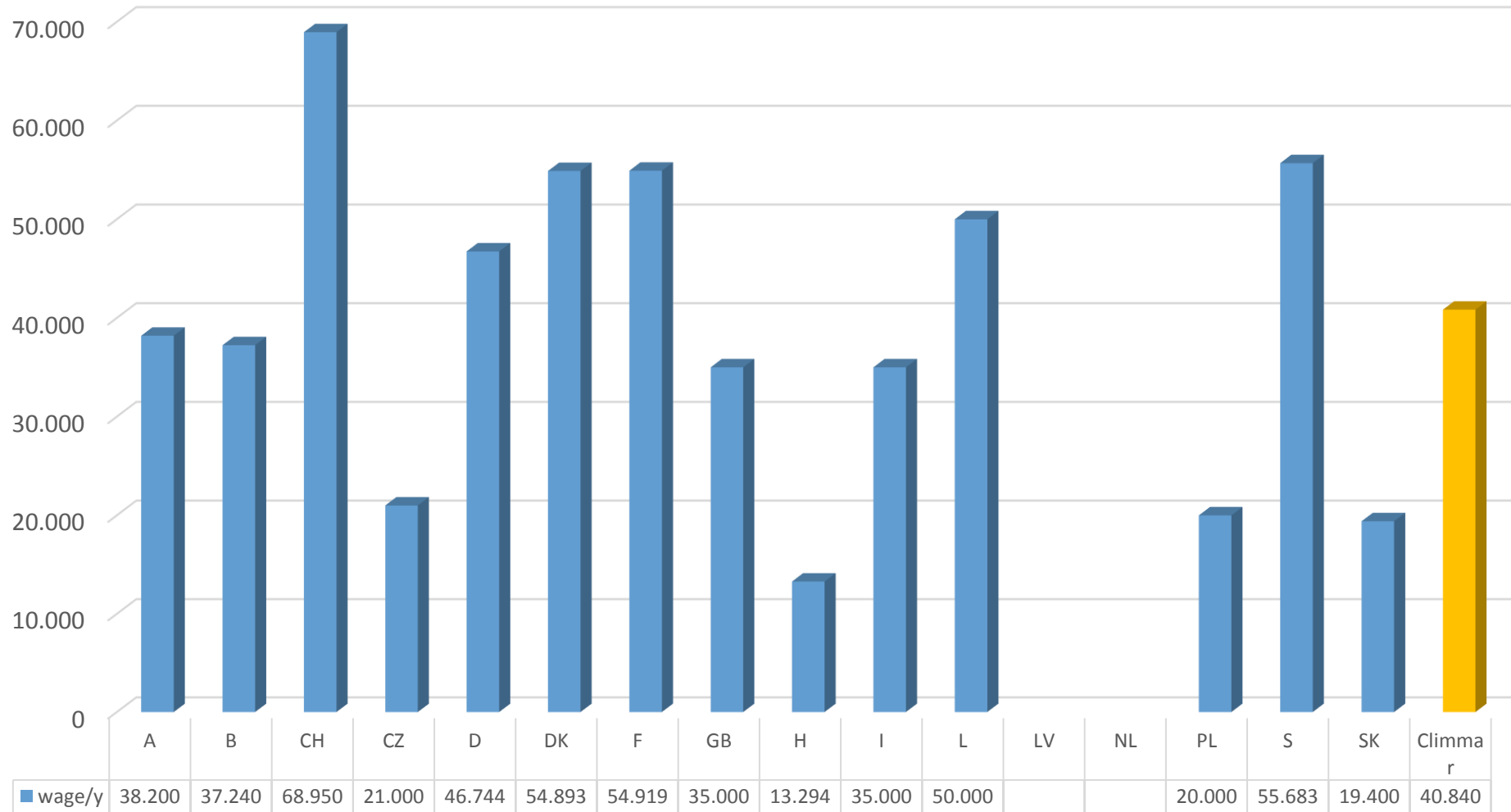
Part III – Companies:

wage per year (average mechanic)





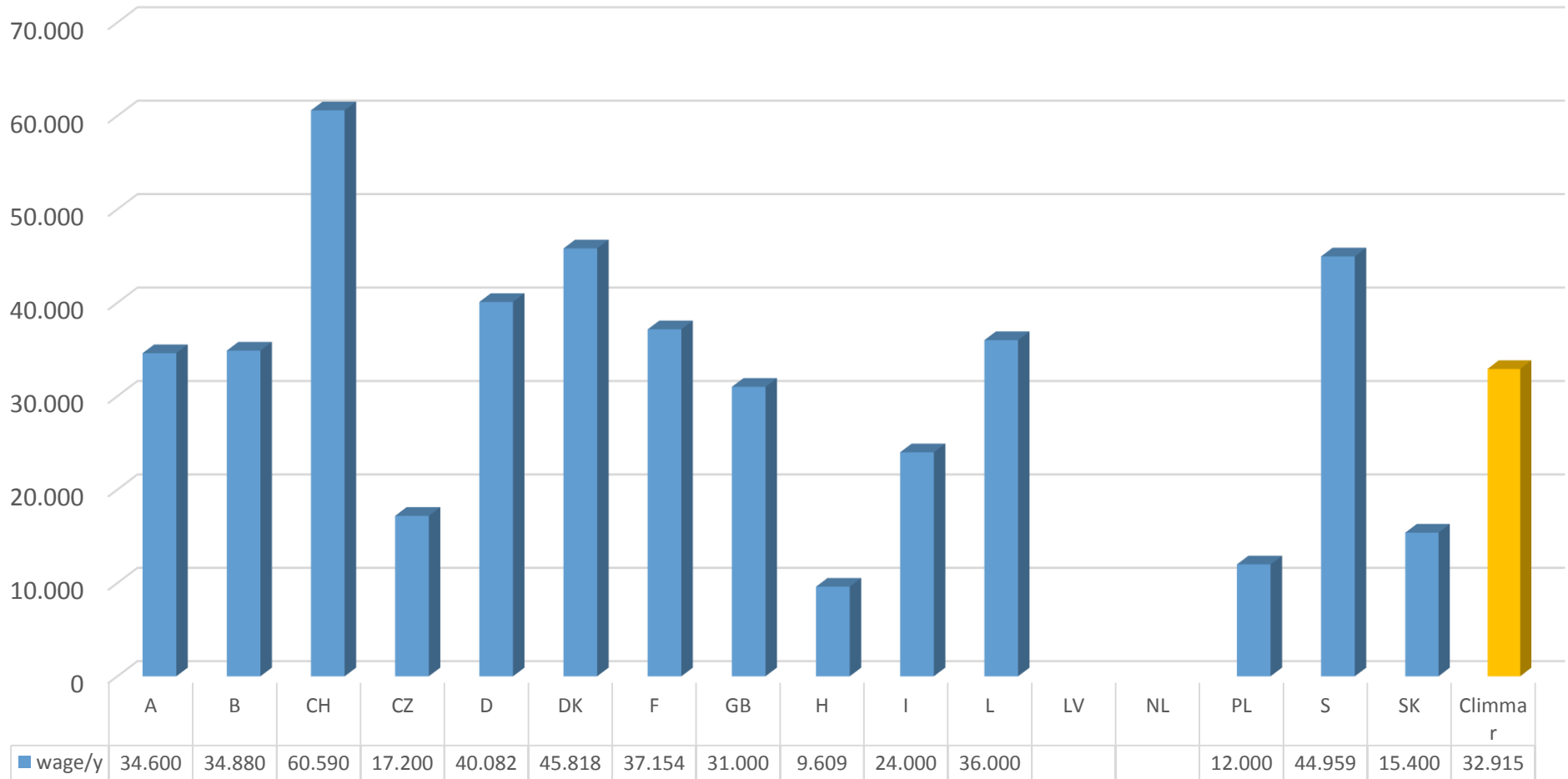
Part III – Companies:
wage per year (workshop-master)





Part III – Companies:

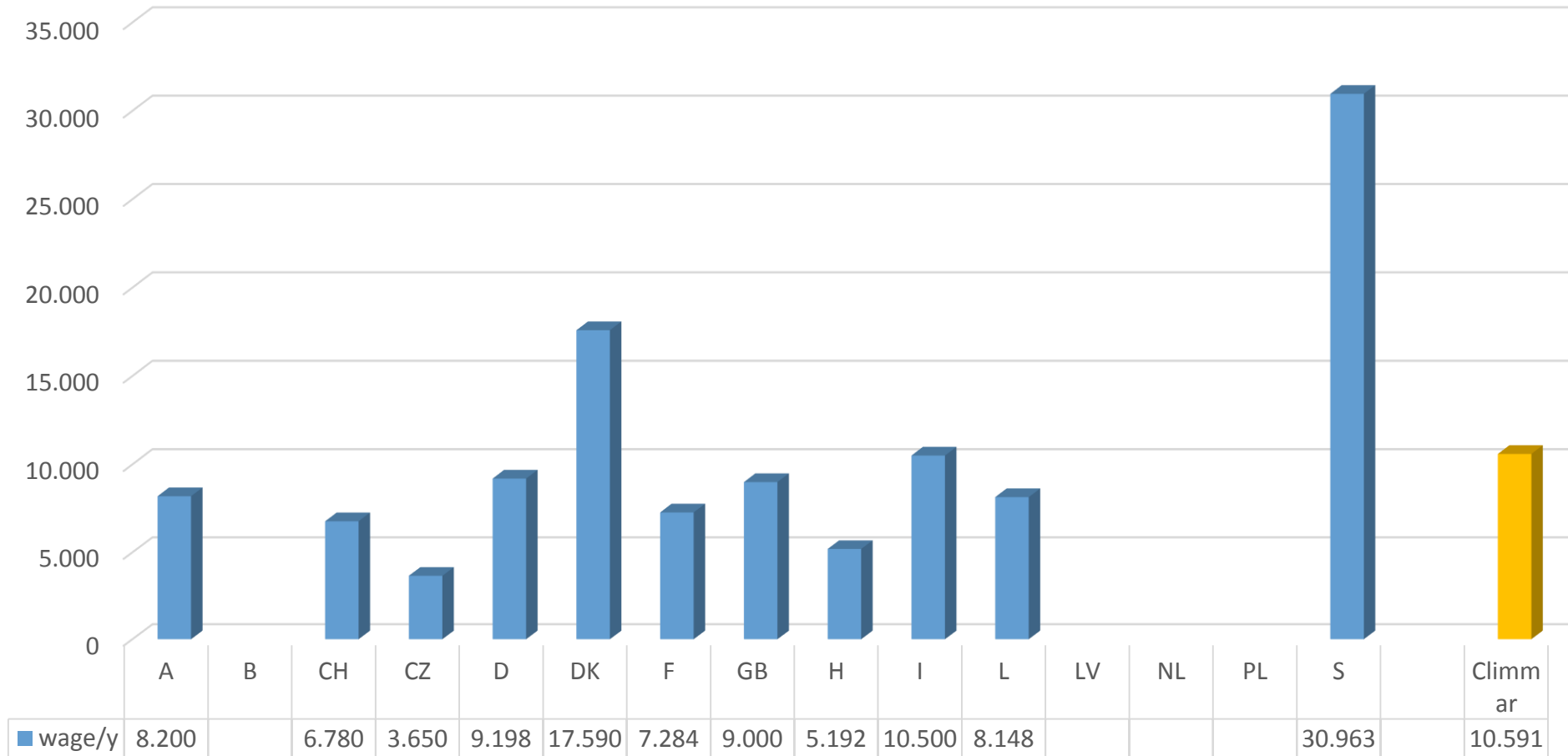
wage per year (partsman)





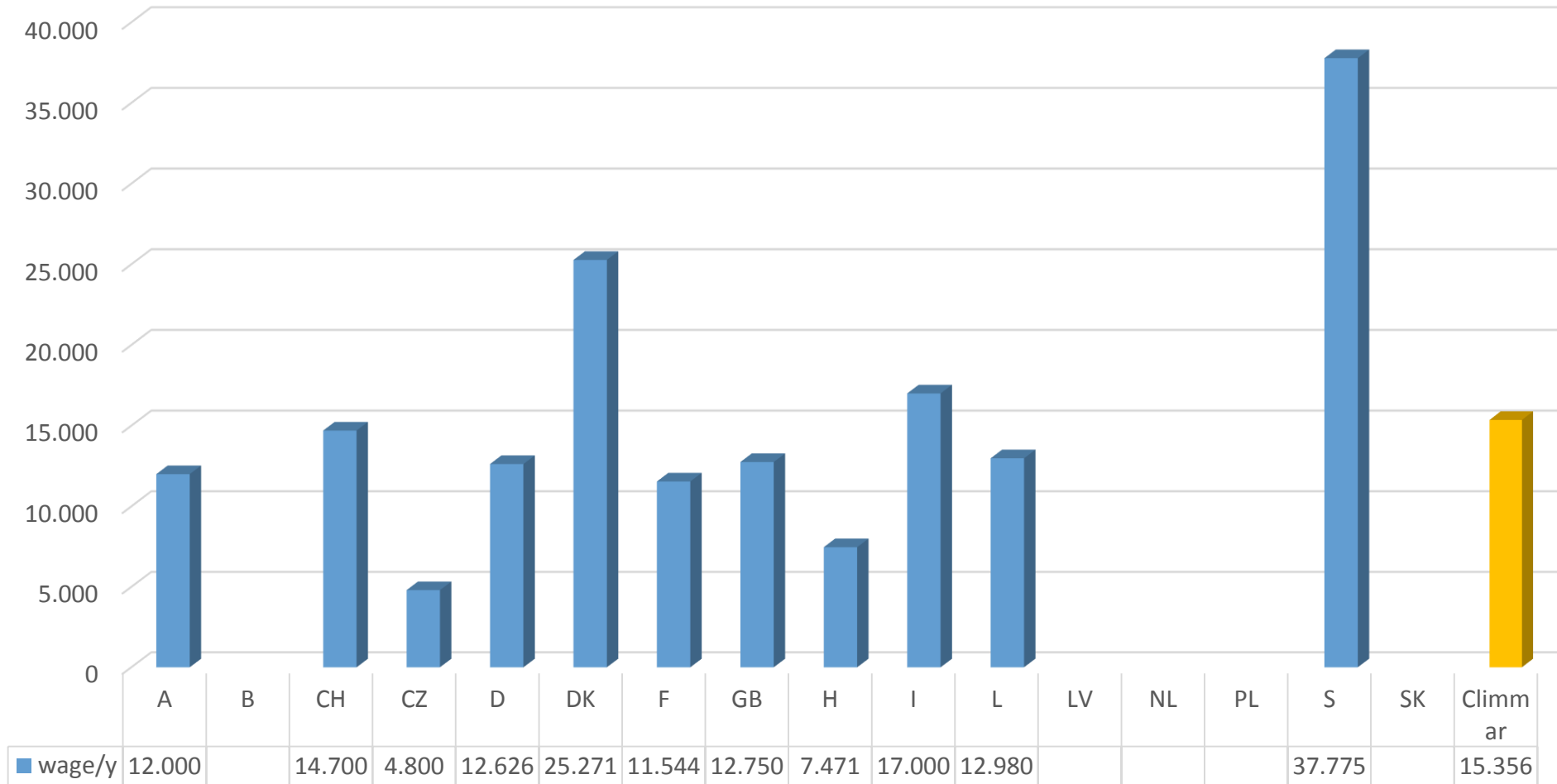
Part III – Companies:

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 2017)

fictional example

Working period calculation	<i>reference periods / actual periods</i>	Table of reference periods
	<i>wages / hour</i>	€ 66,- / (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 2017

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