

# CLIMMAR Branch Report

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



Chairman: Ludger Gude, Vicepresident CLIMMAR

CLIMMAR Congress, 4-6 October 2018,  
Prague

## Participants

“founder”:    

meanwhile: all other are invited, too

under supervision of Vice-President Ludger Gude

## Goal:

There are market statistics for all members, with 75% of the members actively participating (in 2016)

## 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.

## Conditions:

Start slowly to make all members able to join all surveys and to grow year by year.

Projectteam 2 expects the CLIMMAR-members some kind of “change in daily work” to participate: participation is no longer a will, its a need, a duty; even working with the results



## Status Activities:

07-2017: **Paris**-Meeting (F):

- **16** (of 16) members answered trend-survey II/2016 !  
(aim reached)
- small changes in existing surveys  
(more explanations and examples added, not relevant parts deleted)

10-2017: **Luxembourg**-Congress (L):

- **16** (of 16) members answered the survey,  
**88%** of answers were given  
(aim reached)
- Counting ideas for a new CLIMMAR-Branch-Indicator



## Status Activities:

03-2018: **Innsbruck-Meeting (A):**

- **16** (of 17) members answered trend-survey II/2017 !  
(aim reached, but **decreasing**)
- Discussion with different examples for a new CLIMMAR-Branch-Indicator
- Presidentsreports shall be given in a pre-congress and defined structure
- Survey for national gardenmachinery-market basics created

08-2018: **Paris-Meeting (F) / 10-2018 Prague-Congress:**

- **16** (of 17) members answered the survey, **80%** of answers were given  
(aim reached, but **decreasing**)
- definition of a new CLIMMAR-Branch-Indicator: “CLIMMAR-index”
- founding a new CLIMMAR-Projectgroup “Gardenmachinery-Business”,  
1st meeting in Prague (only for active participants)



## Projectteam results:

- 9 reports / meetings since founding
- within 5 meetings exclusive for projectteam
- What happened?

## Survey 2018 – results for:

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

just a view on similar items,

all CLIMMAR-member ass. get a complete version (Excel) to work with



## **Survey 2018 – results for:**

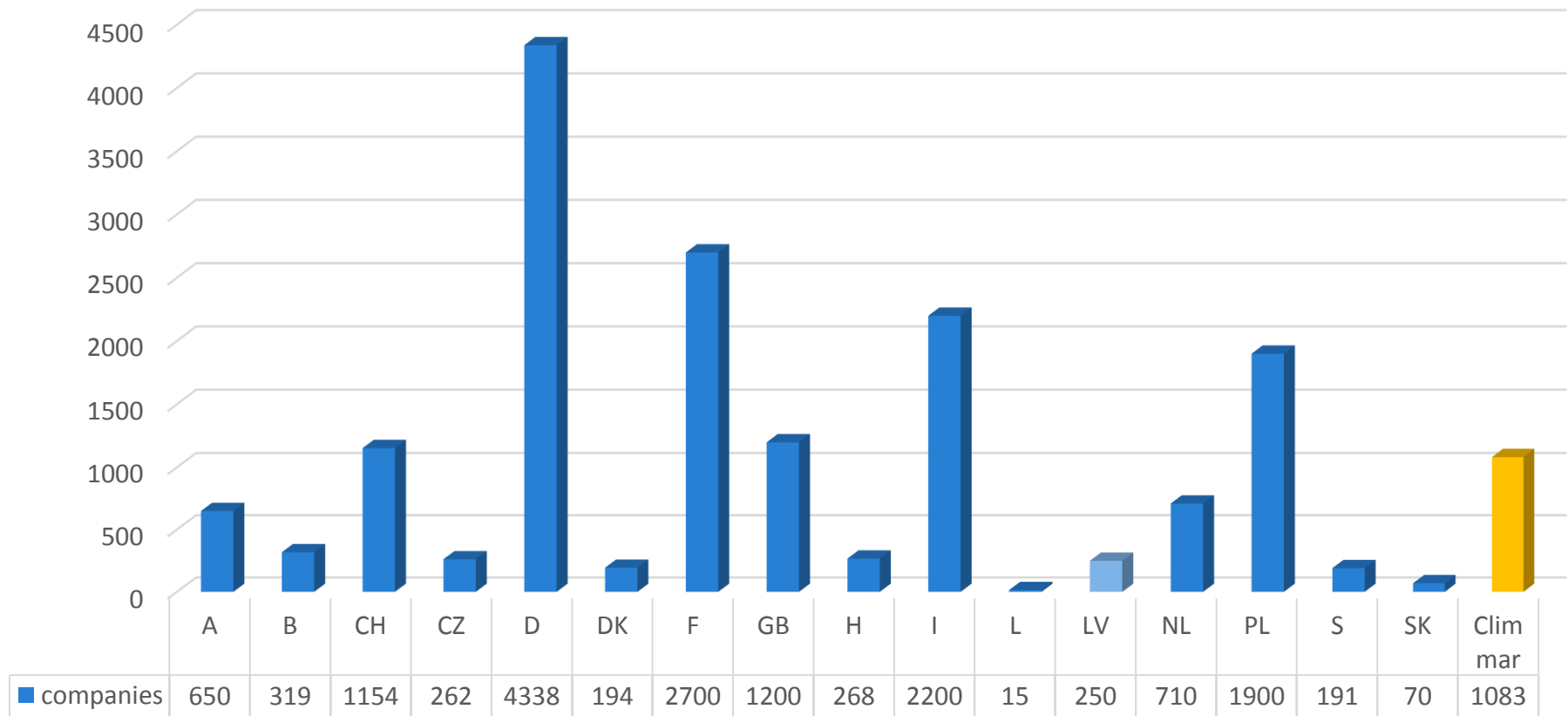
 Part 1:

# **National branch view – markets & structures**

National Markets and Structures:

Number of Companies:

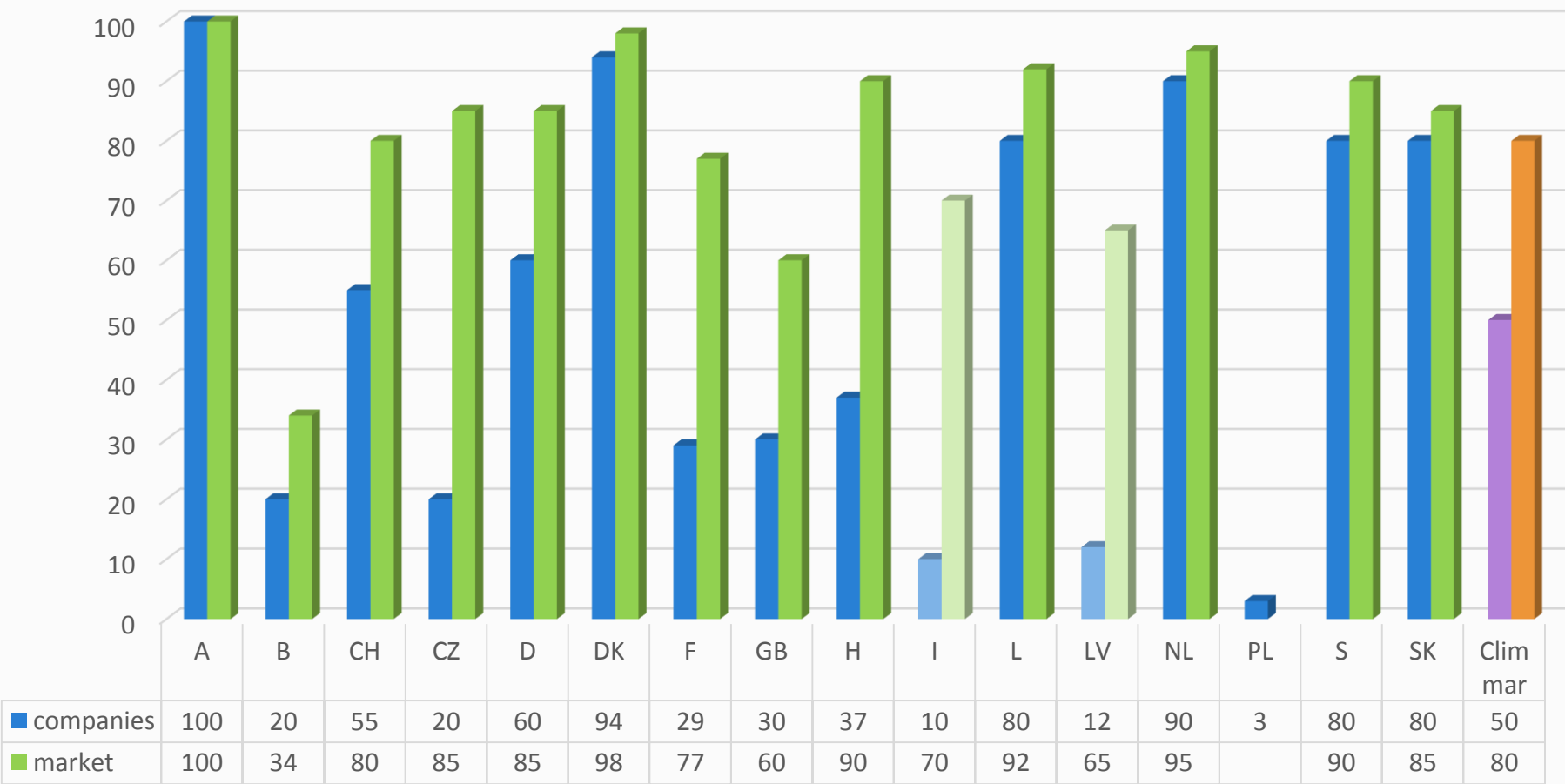
16.300 Dealers (incl. satellites) & Servicefirms



Source: CLIMMAR

# National Markets and Structures:

organisation level: 50% membership are responsible for 80% market



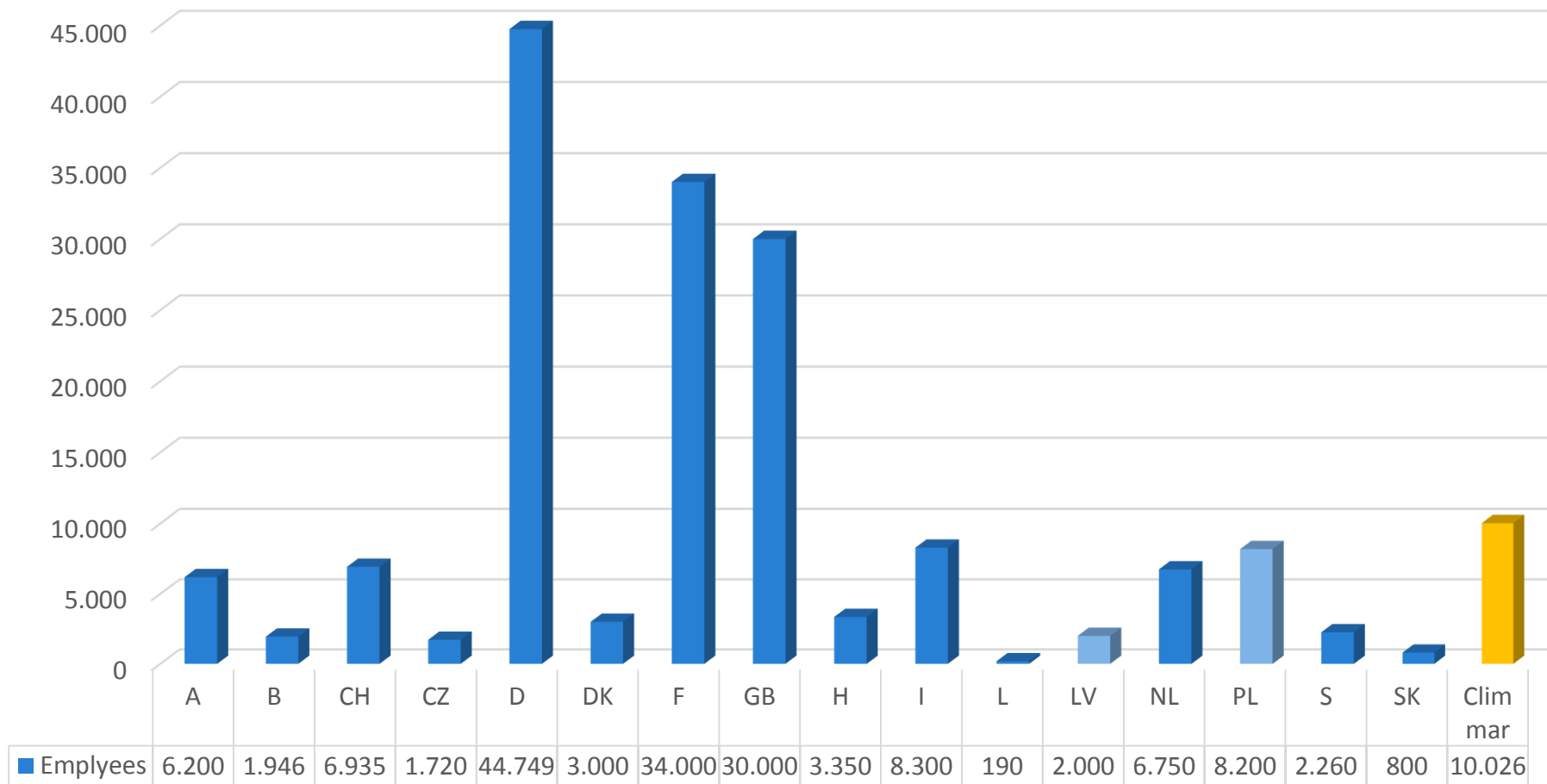
Source: CLIMMAR





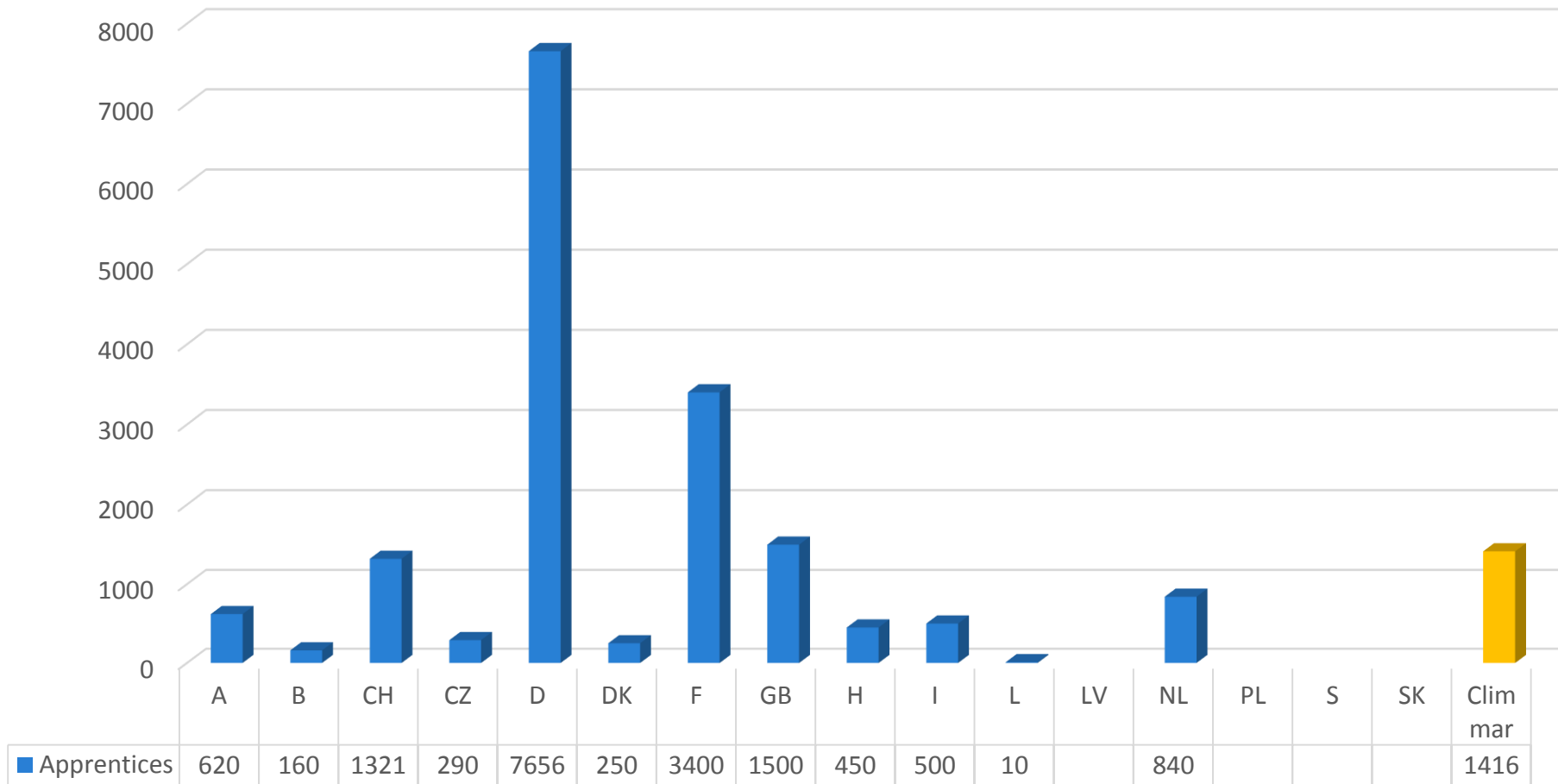
## National Markets and Structures:

close to 160.000 Employees



Source: CLIMMAR

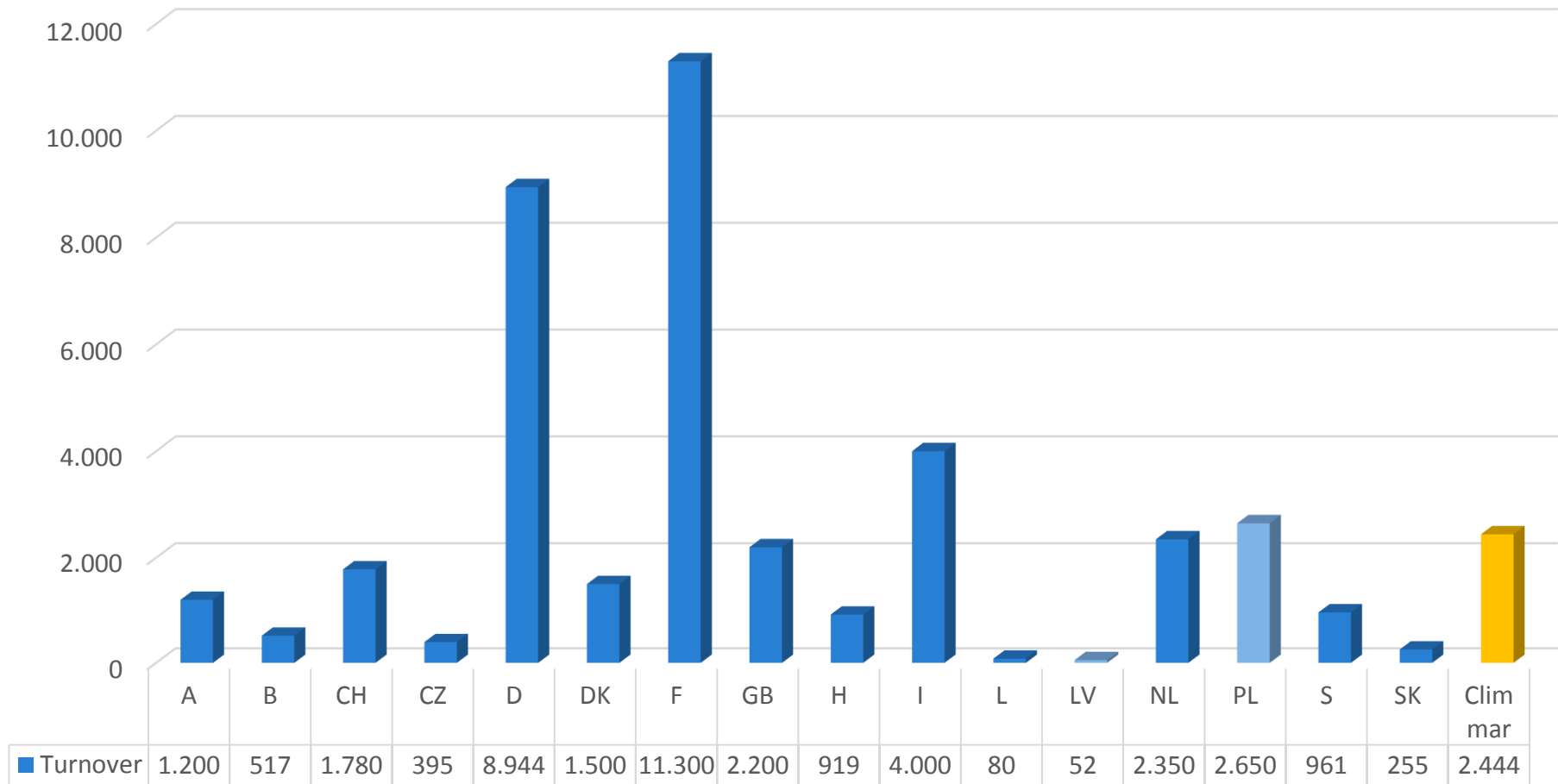
## National Markets and Structures: near to 17.000 Apprentices



Source: CLIMMAR

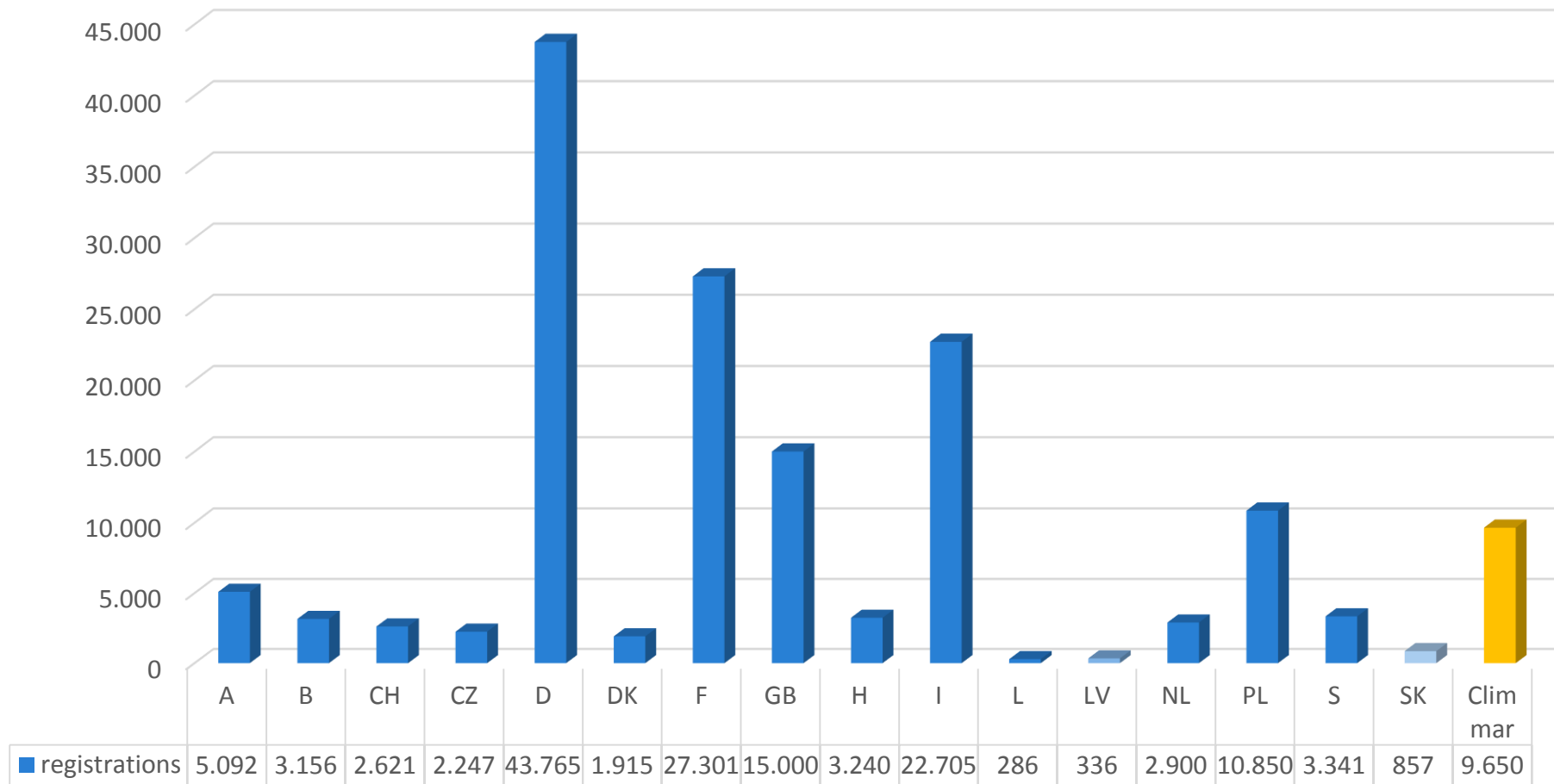
## National Markets and Structures:

Turnover (in 1.000 €): **38.800**



Source: CLIMMAR

## National Markets and Structures: Tractor Sales

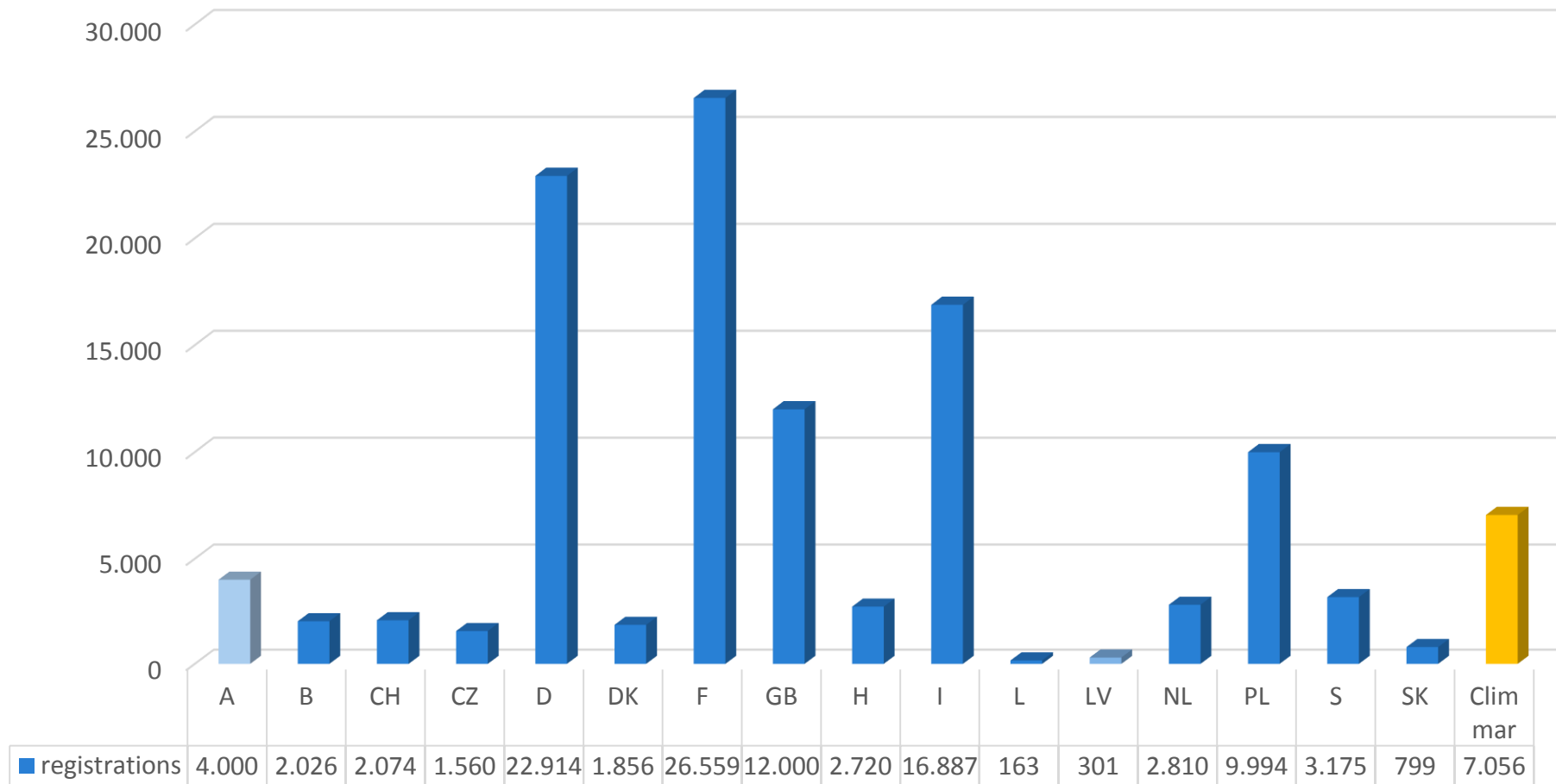


Source: CLIMMAR

SK from 2015

CLIMMAR Congress, 4-6 October 2018,  
Prague

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



Source: CLIMMAR

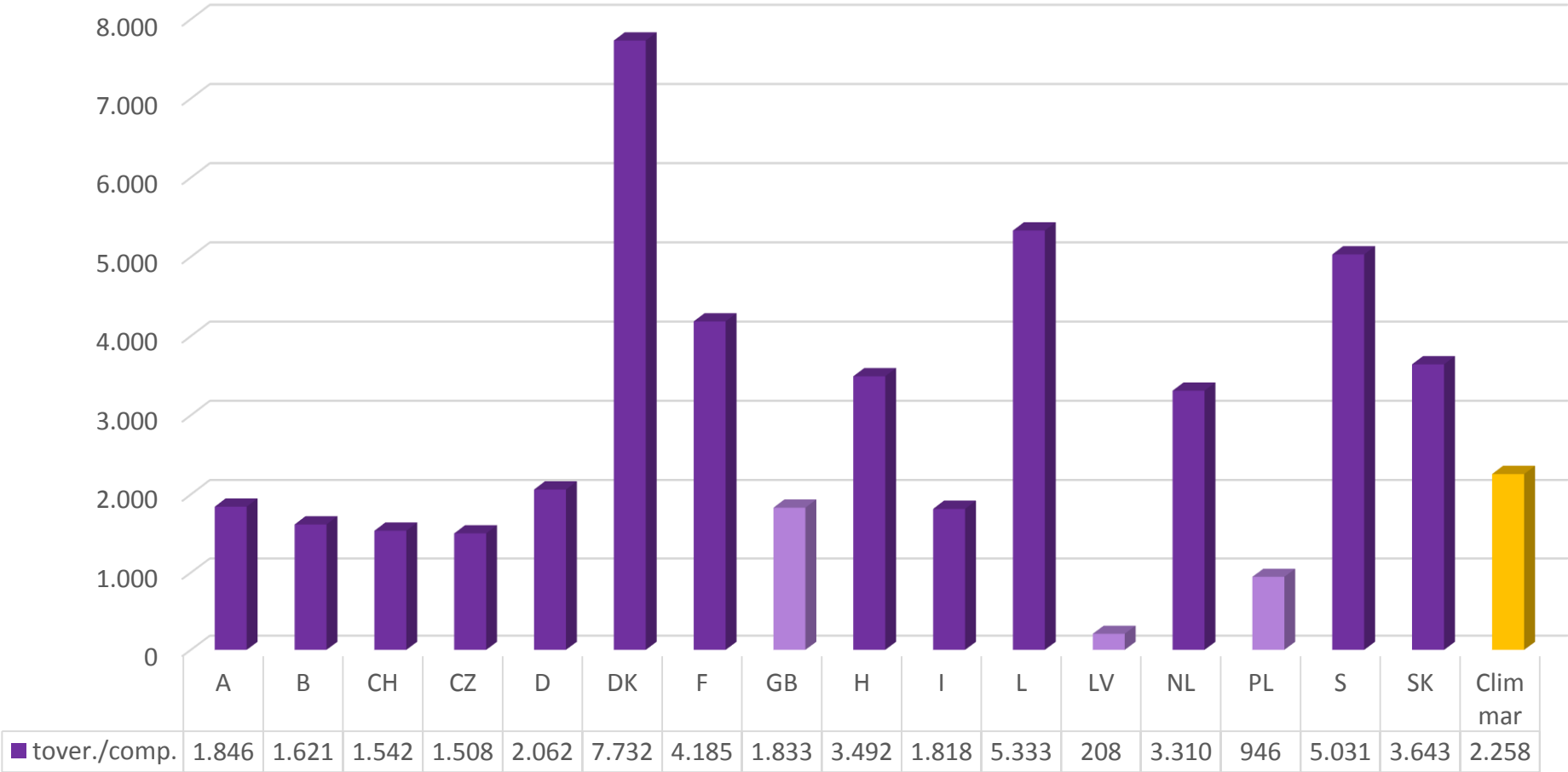
A from 2015

CLIMMAR Congress, 4-6 October 2018,  
Prague



# National Markets and Structures:

relations: Turnover per Company

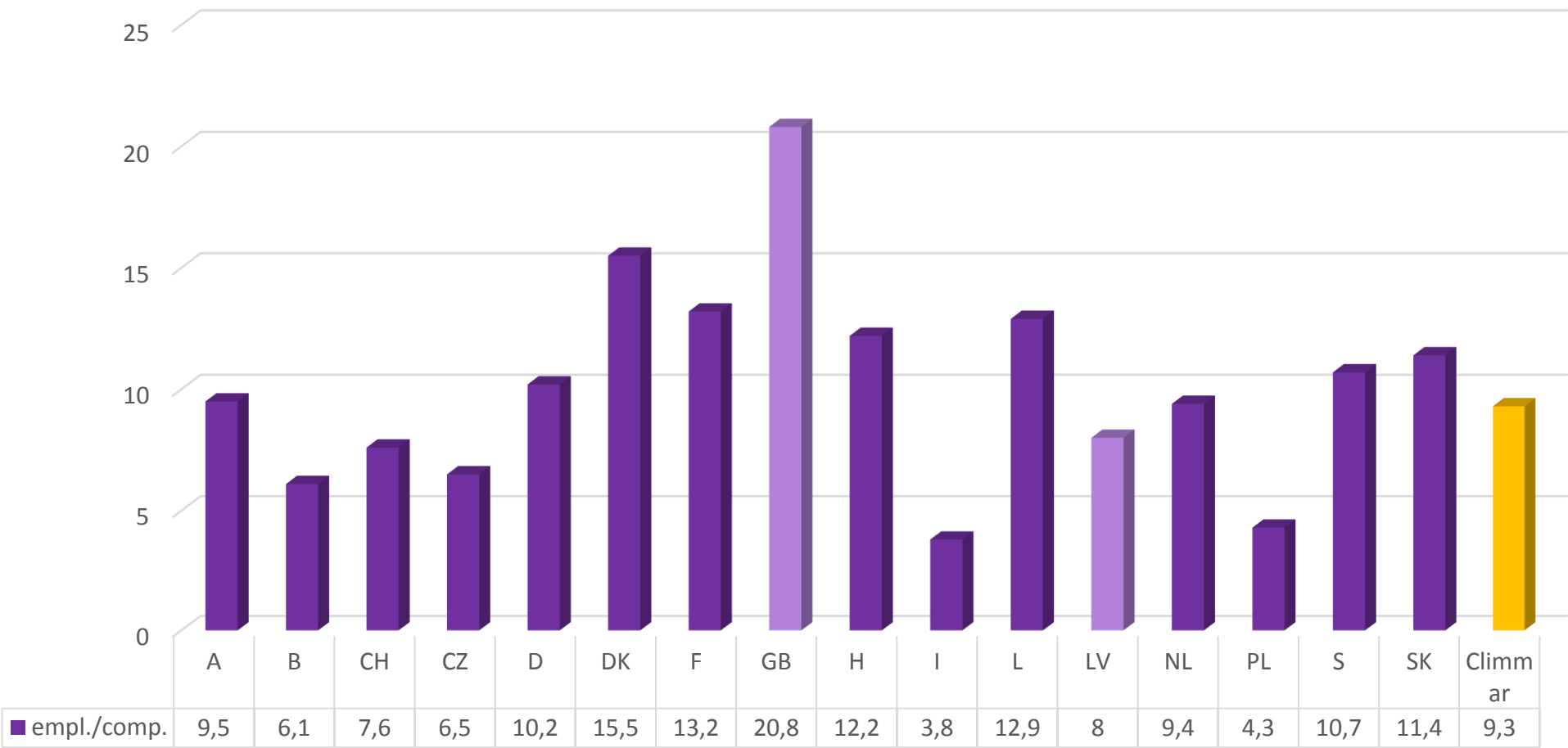


Source: CLIMMAR



# National Markets and Structures:

relations: Employees per Company

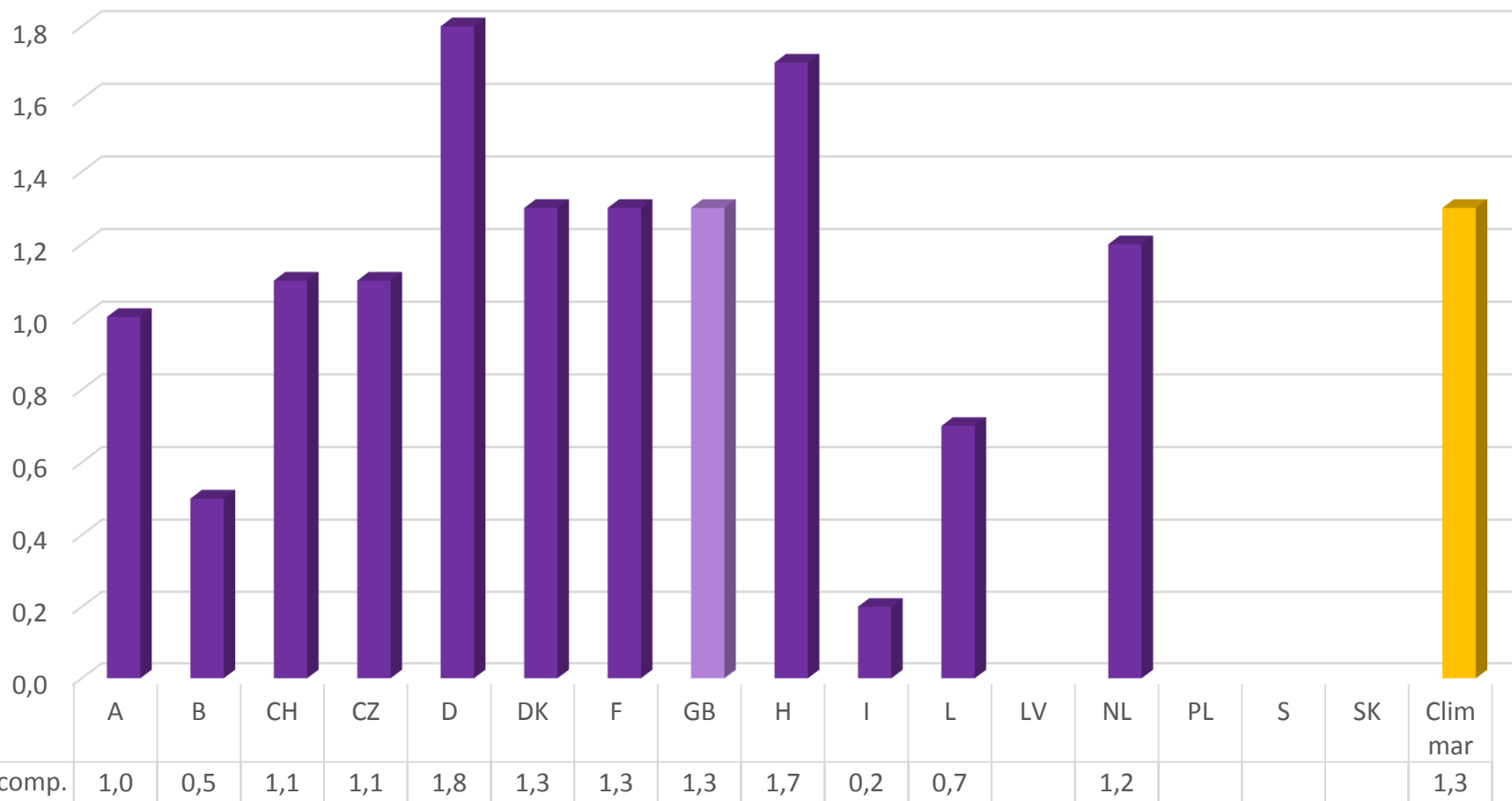


Source: CLIMMAR



## National Markets and Structures:

relations: Apprentices per Company

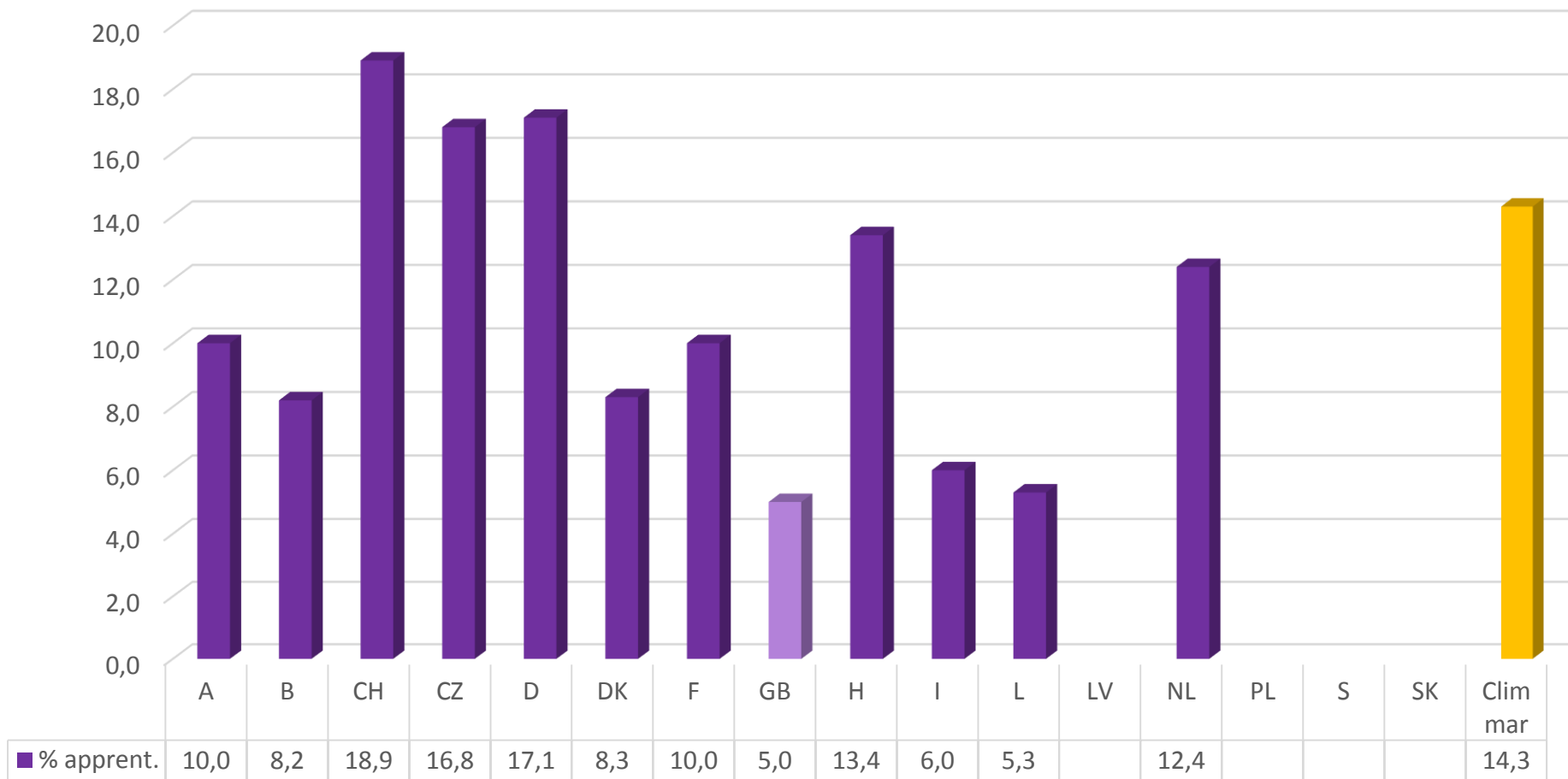


Source: CLIMMAR



## National Markets and Structures:

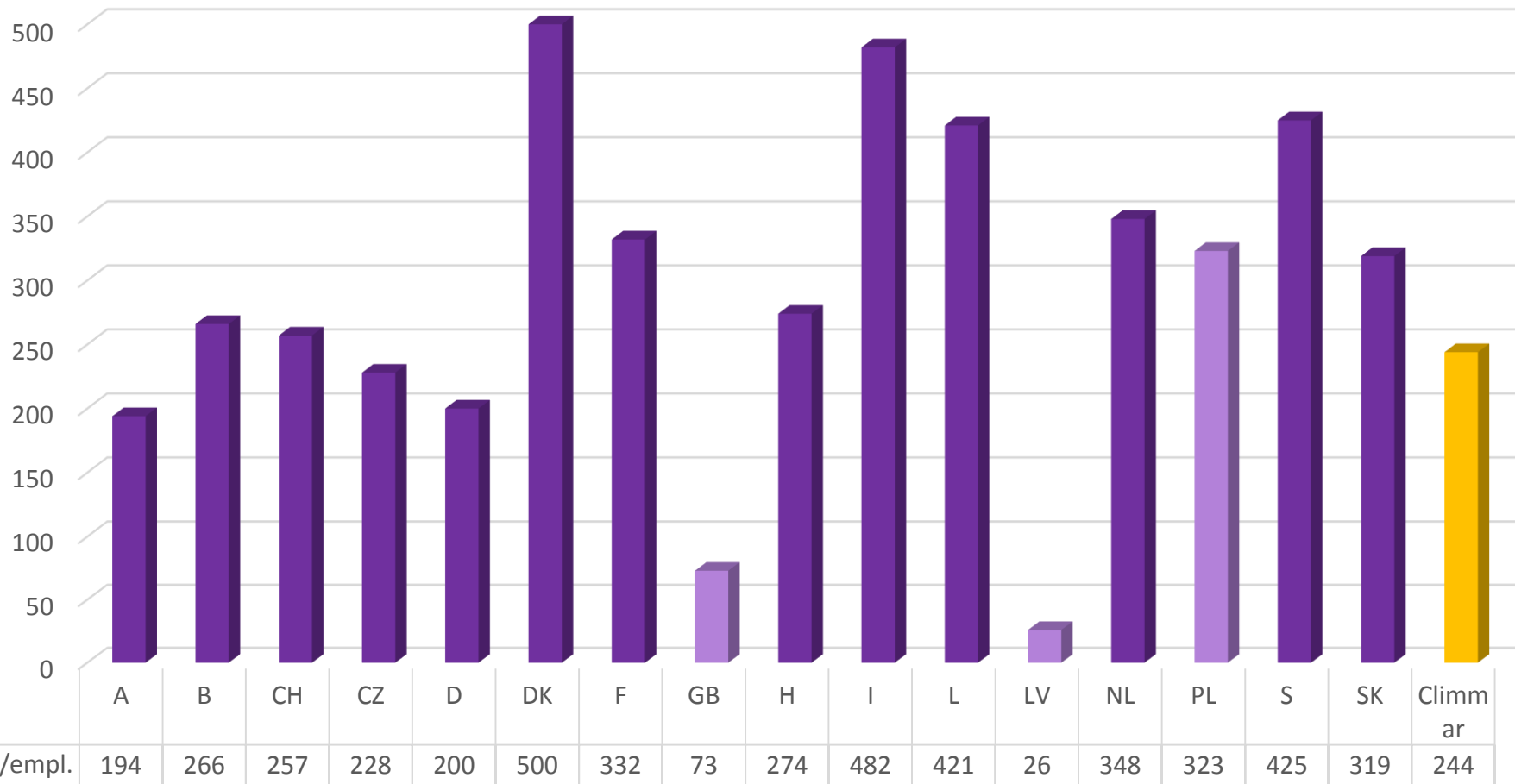
relations: % Apprentices (of Employees)



Source: CLIMMAR

## National Markets and Structures:

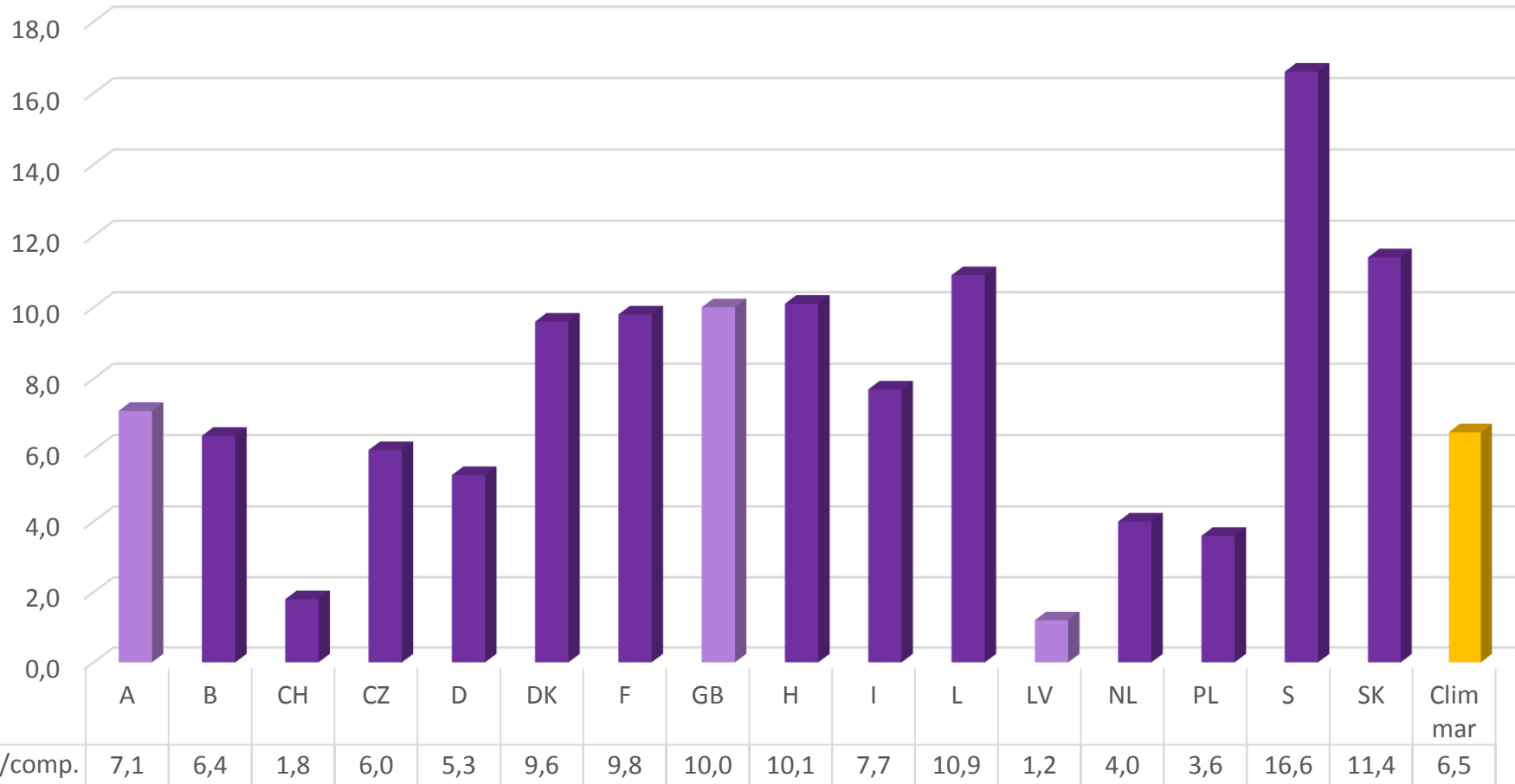
relations: Turnover per Employee



Source: CLIMMAR

## National Markets and Structures:

relations: Tractor sales (>50 hp) per dealercompany



Source: CLIMMAR



**Survey 2018 – results for:**

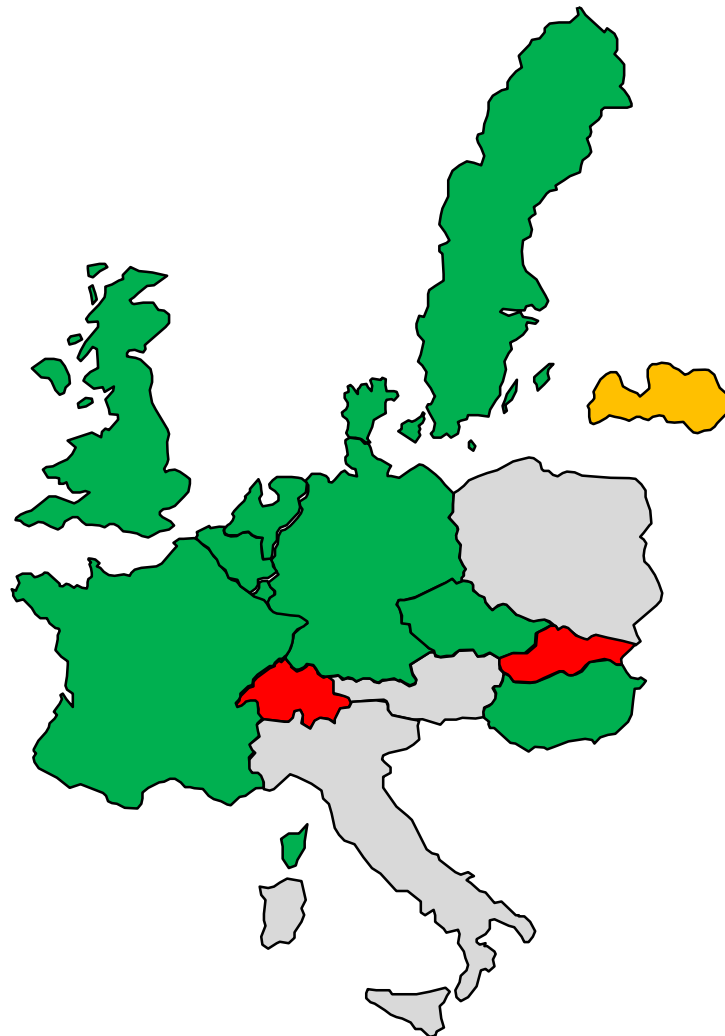
 **National Branch view –  
current situation: the Trends**



## Part II - Trends:

### I. Comparison to same period last year: **January - June 2018**

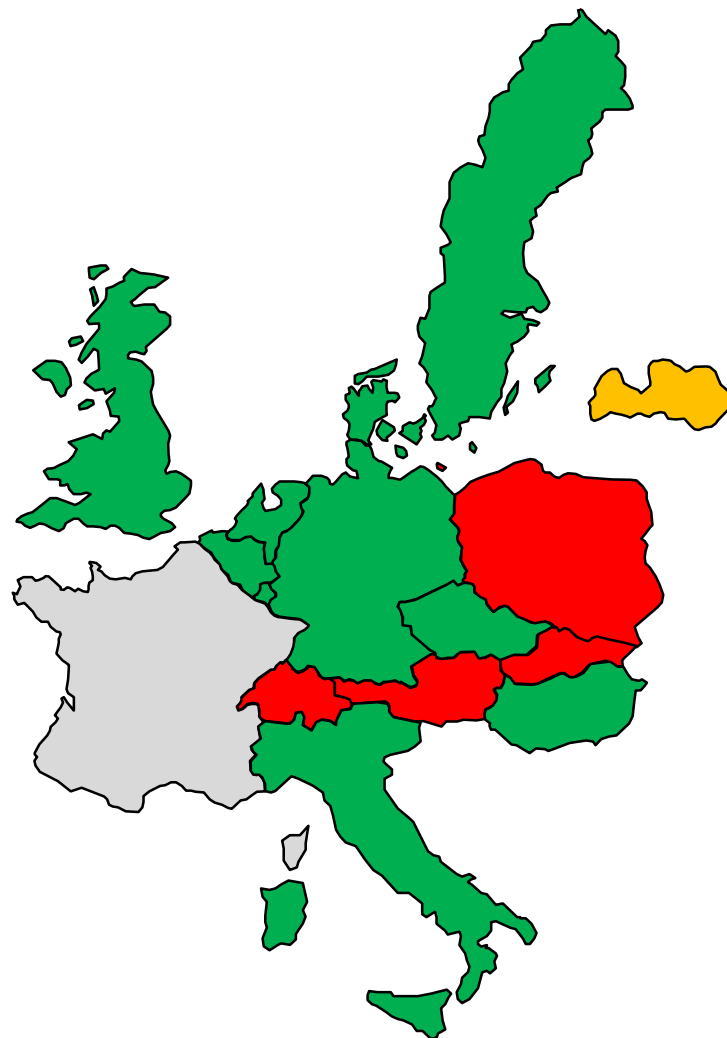
|       |                      | - (minus / worse) | = (equal) | + (plus / better) |
|-------|----------------------|-------------------|-----------|-------------------|
| A.    | Turnover total       |                   |           | X                 |
| A.I   | Turnover Machinery   |             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



## Turnover total

**development** of turnover in the first half of 2018 compared with the same period 2017:

- less / worse / decrease
- equal
- more / growing / increase
- no answer



## Turnover new equipment

development of turnover in the first half of 2018 compared with the same period 2017:

- less / worse / decrease
- equal
- more / growing / increase
- no answer



## Turnover workshop

development of turnover in the first half of 2018 compared with the same period 2017:

- less / worse / decrease
- equal
- more / growing / increase
- no answer





## Turnover spareparts

development of turnover in  
the first half of 2018  
compared with the same  
period 2017:

- less / worse / decrease
- equal
- more / growing / increase
- no answer

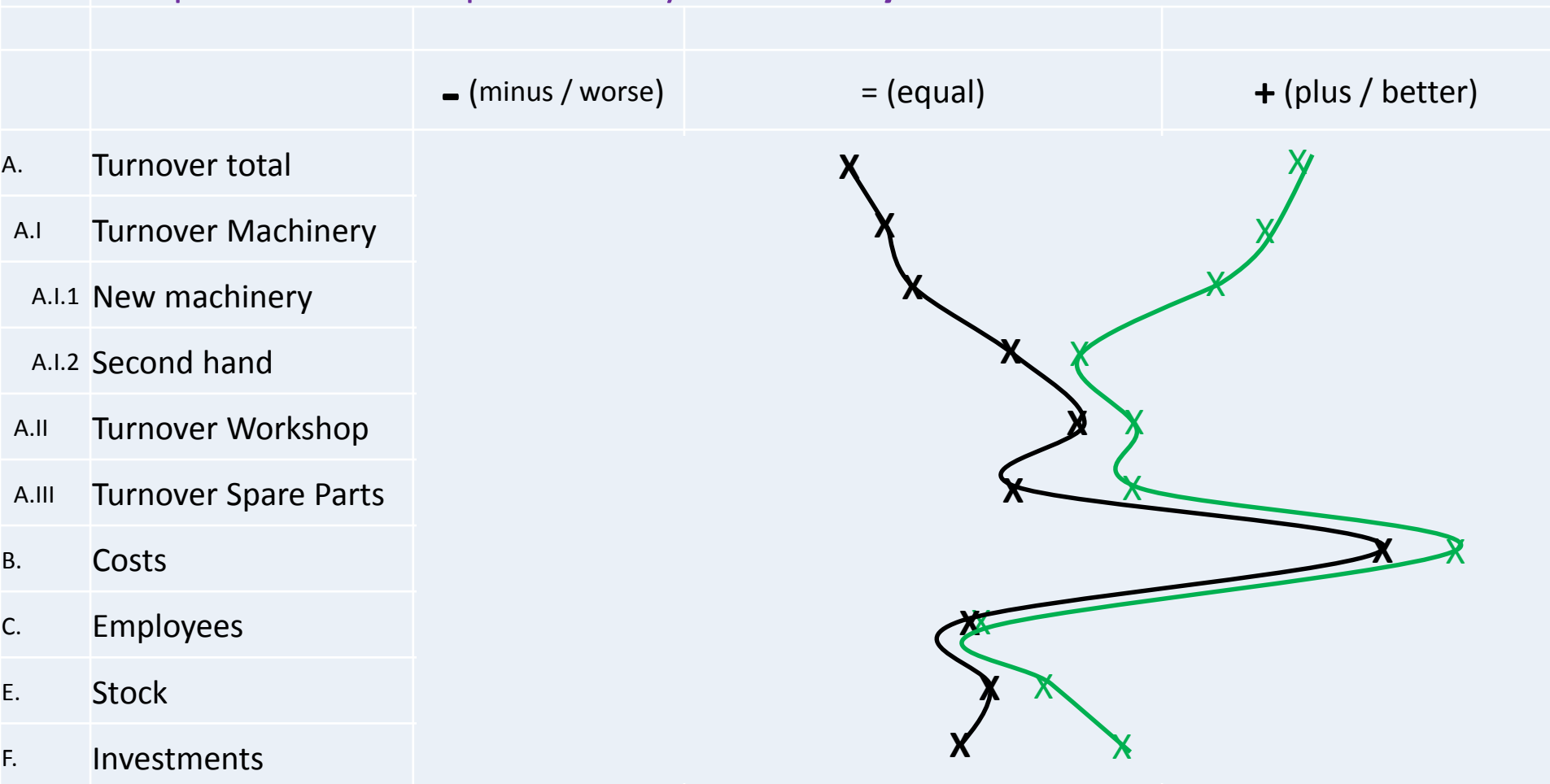


X = last half year

X = future expectation

## Part II - Trends:

### I. Comparison to same period last year: January - June 2018

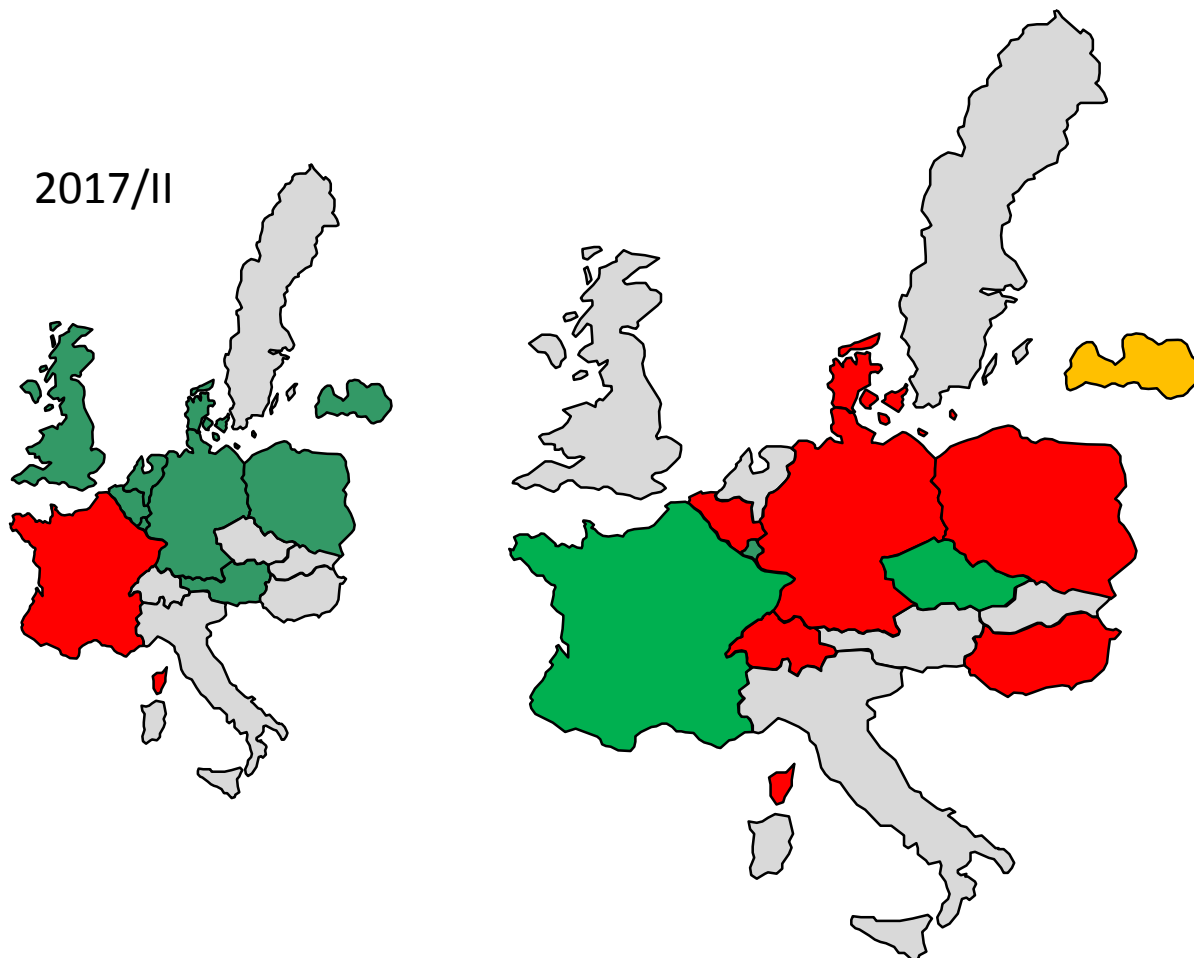


## Part II - Trends:

| II. Expectation for the following quarter: July - December 2018 |                       |                       |                              |                                 |
|-----------------------------------------------------------------|-----------------------|-----------------------|------------------------------|---------------------------------|
|                                                                 |                       | - (minus / worse)     | = (equal)                    | + (plus / better)               |
| A.                                                              | Turnover total        | <b>B CH D DK H PL</b> | A I NL S SK UK               | <b>CZ F L</b>                   |
| A.I                                                             | Turnover Machinery    | <b>B CH D DK H PL</b> | A I NL S UK                  | <b>CZ F L SK</b>                |
| A.I.1                                                           | New machinery         | <b>B CH D DK H PL</b> | A F I NL S                   | <b>CZ L SK UK</b>               |
| A.I.2                                                           | Second hand machinery | <b>B DK</b>           | A CH H I NL S SK UK          | <b>CZ D F L PL</b>              |
| A.II                                                            | Turnover Workshop     | <b>B</b>              | A CH DK PL S SK              | <b>CZ D F H I L NL UK</b>       |
| A.III                                                           | Turnover Spare parts  | <b>B DK S</b>         | A CH NL PL SK UK             | <b>CZ D F H I L</b>             |
| B.                                                              | Costs                 |                       | A DK I NL                    | <b>B CH CZ D H L PL S SK UK</b> |
| C.                                                              | Employees             | <b>DK</b>             | A B CH CZ D H I L NL PL S SK | <b>F UK</b>                     |
| E.                                                              | Stock                 | <b>S</b>              | A CH CZ D F H L NL SK UK     | <b>B DK I PL</b>                |
| F.                                                              | Investments           | <b>DK I NL</b>        | A CH CZ D H L S SK           | <b>B PL UK</b>                  |



2017/II



## Turnover total

**Expectations** for the current half of 2018

- less / worse / decrease
- equal
- more / growing / increase
- no answer

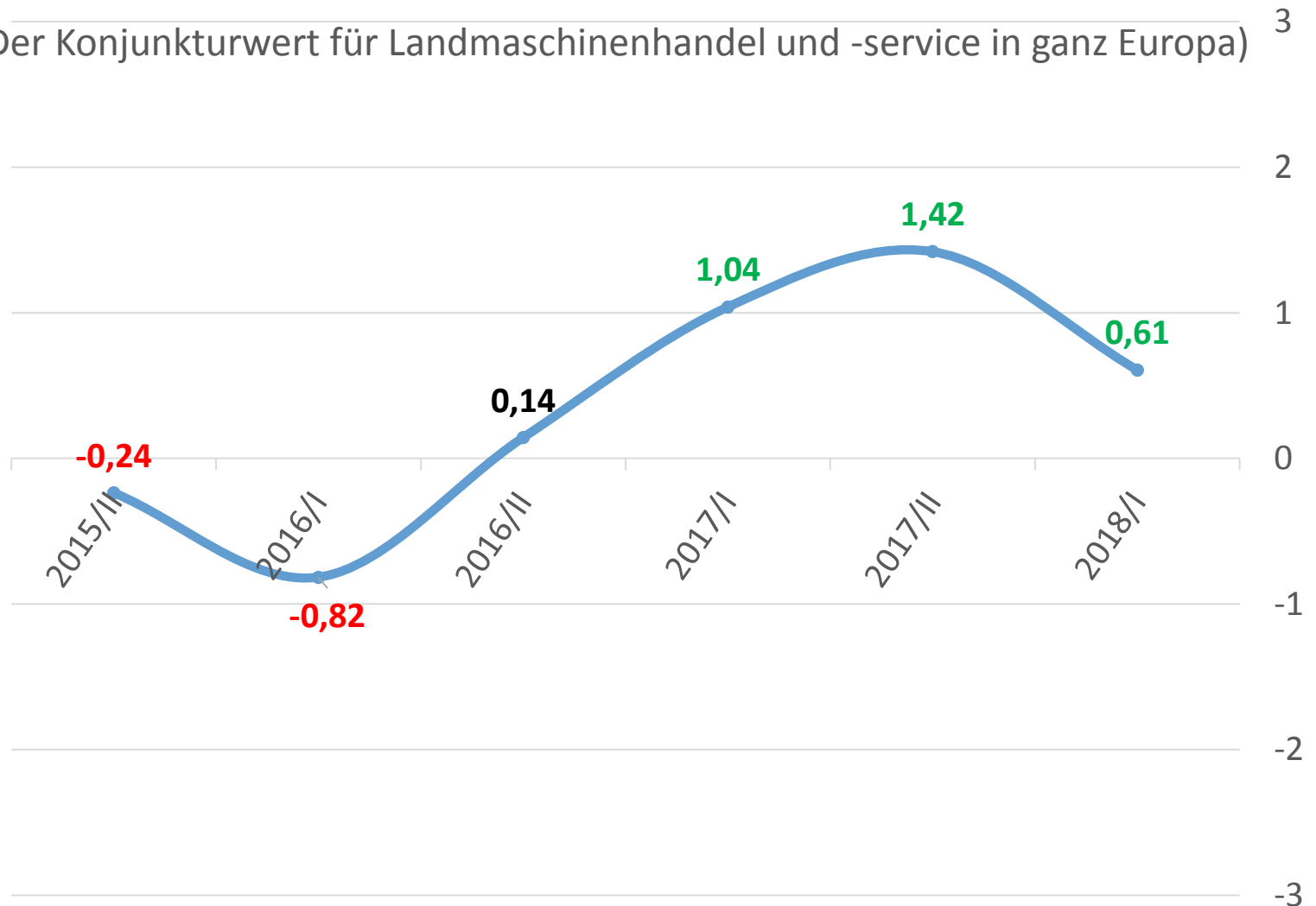
## New / world premiere: **CLIMMAR-Index**

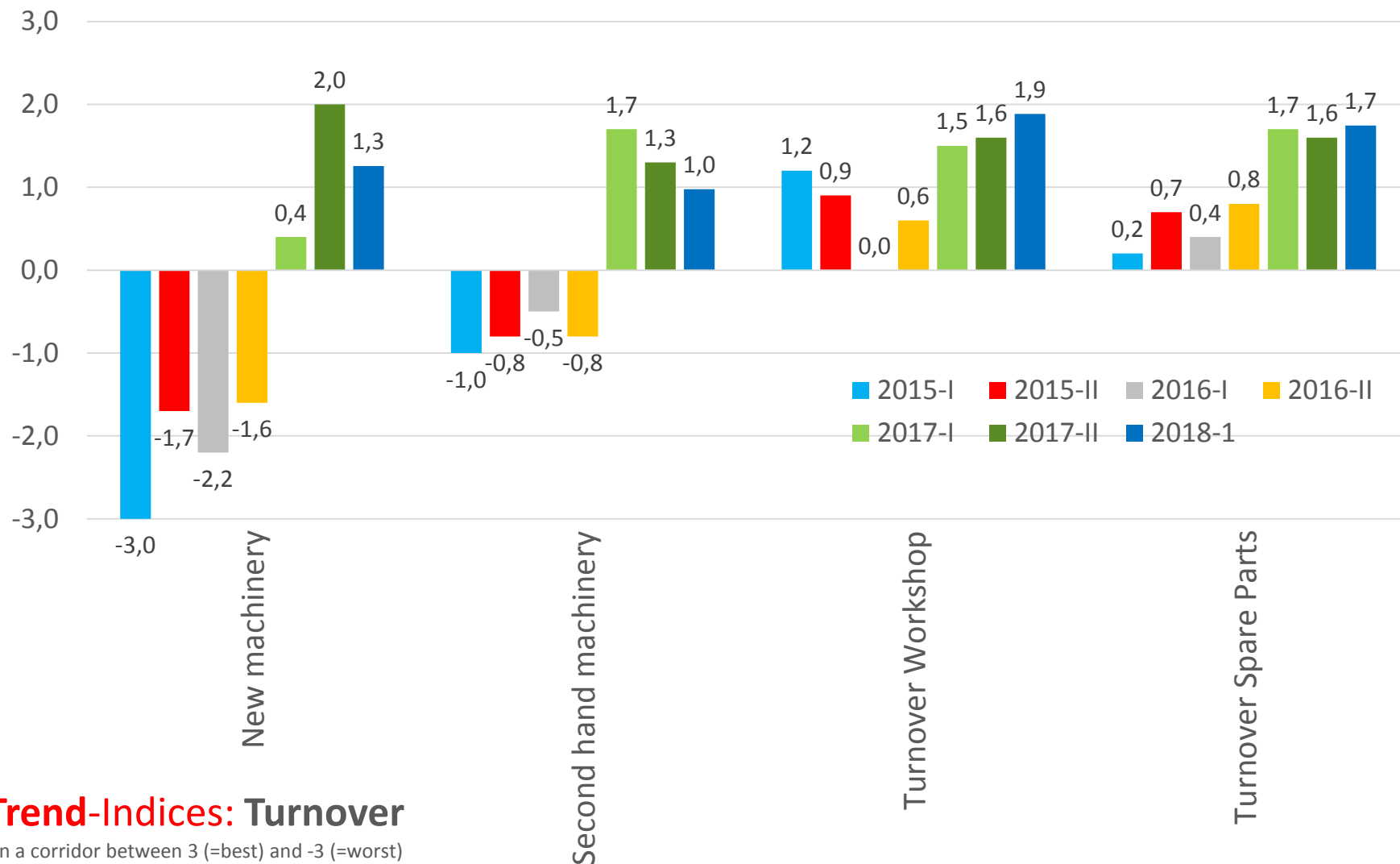
Based on our halfyear-survey we take 4 turnover-segments from the **current situation** and two from the **expectations** and middle it with different weights:

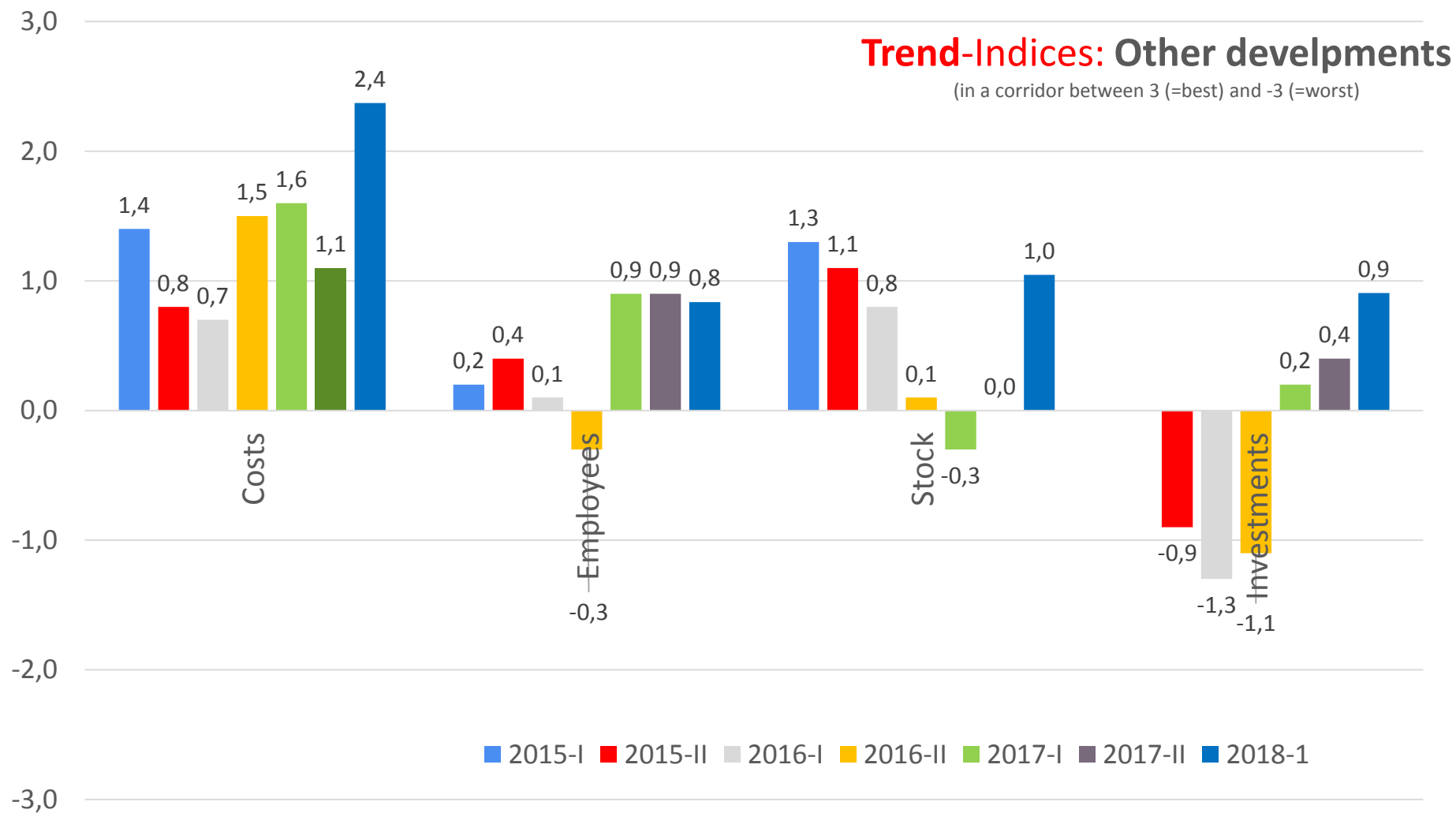
| source       |                                | weight |
|--------------|--------------------------------|--------|
| development  | Turnover new machinery         | 1      |
| development  | Turnover second hand machinery | 1      |
| development  | Turnover Workshop              | 2      |
| development  | Turnover Spare Parts           | 2      |
| expectations | Turnover total                 | 2      |
| expectations | Investments                    | 2      |

## New / world premiere: **CLIMMAR-Index**

(Der Konjunkturwert für Landmaschinenhandel und -service in ganz Europa)



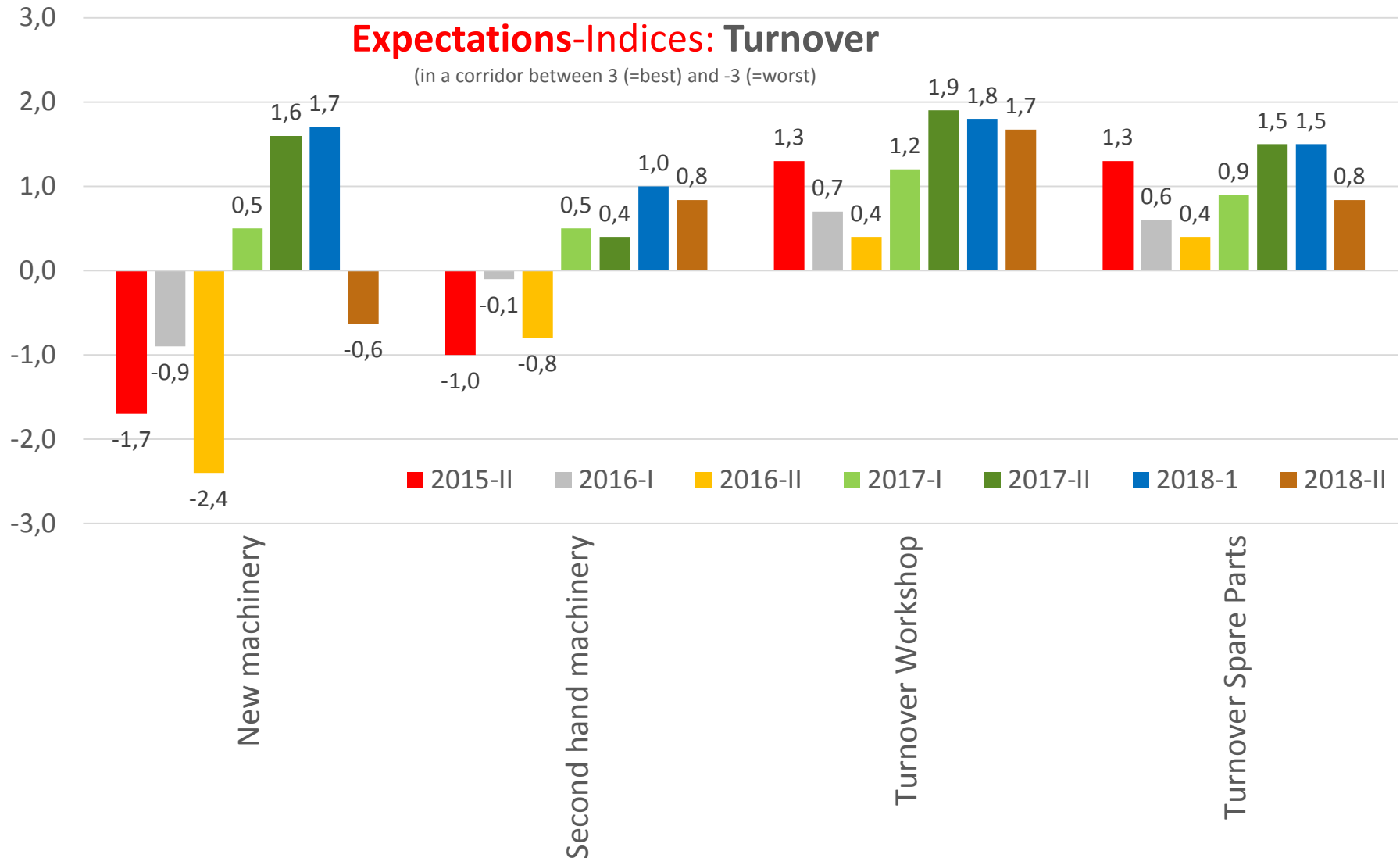


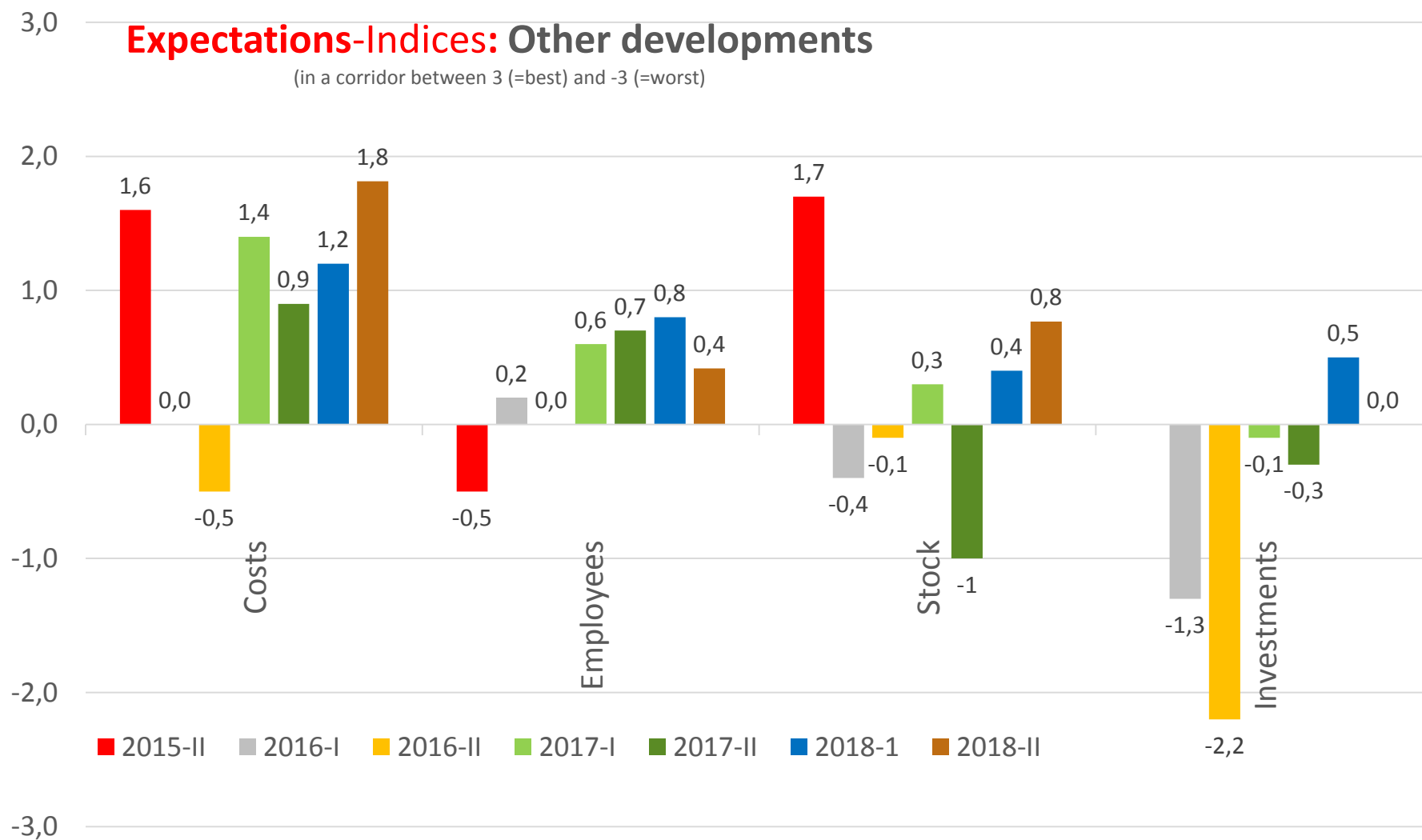




## Expectations-Indices: Turnover

(in a corridor between 3 (=best) and -3 (=worst))





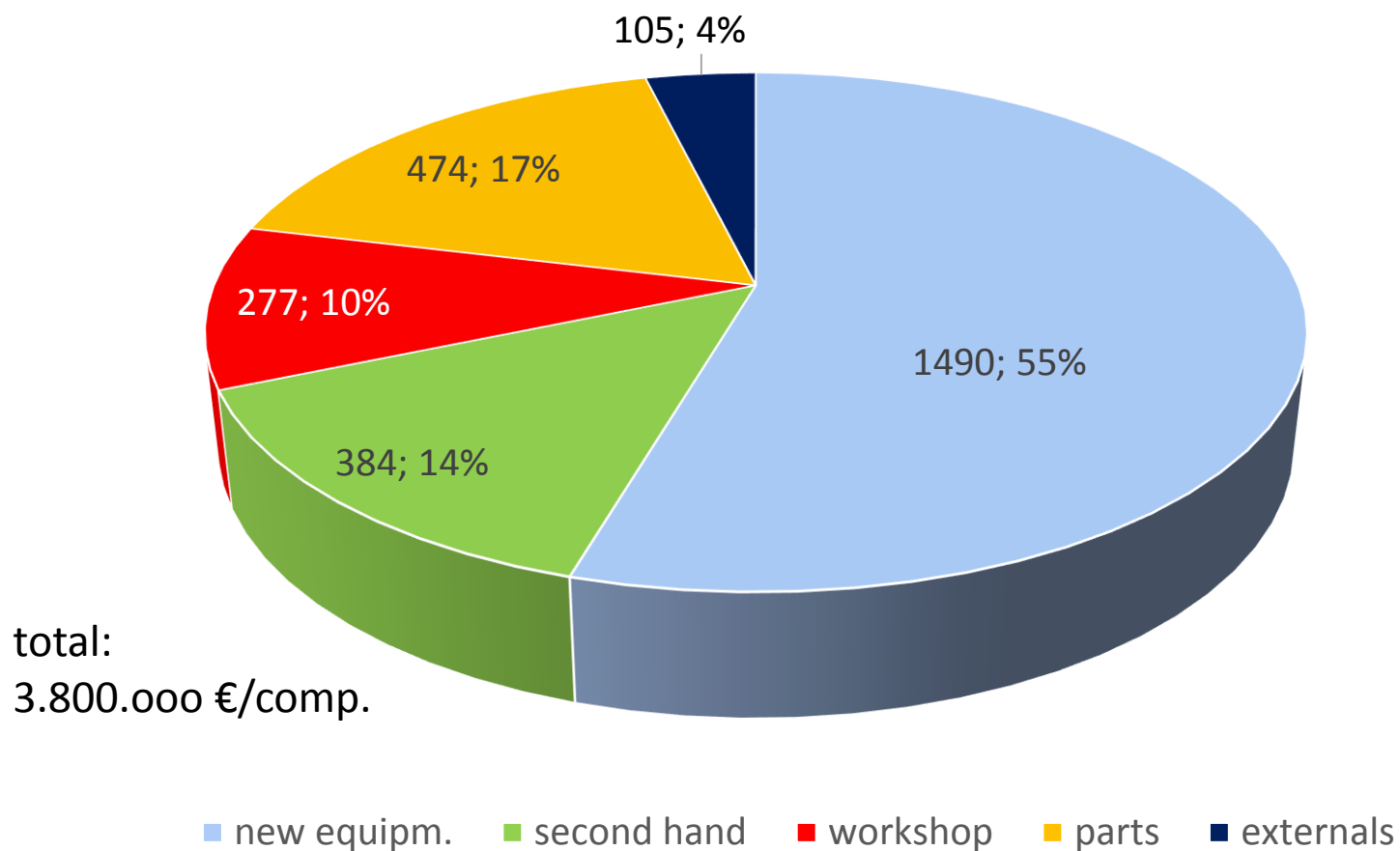
**Survey 2018 – results for:**

 **Dealers view –  
companies averages**



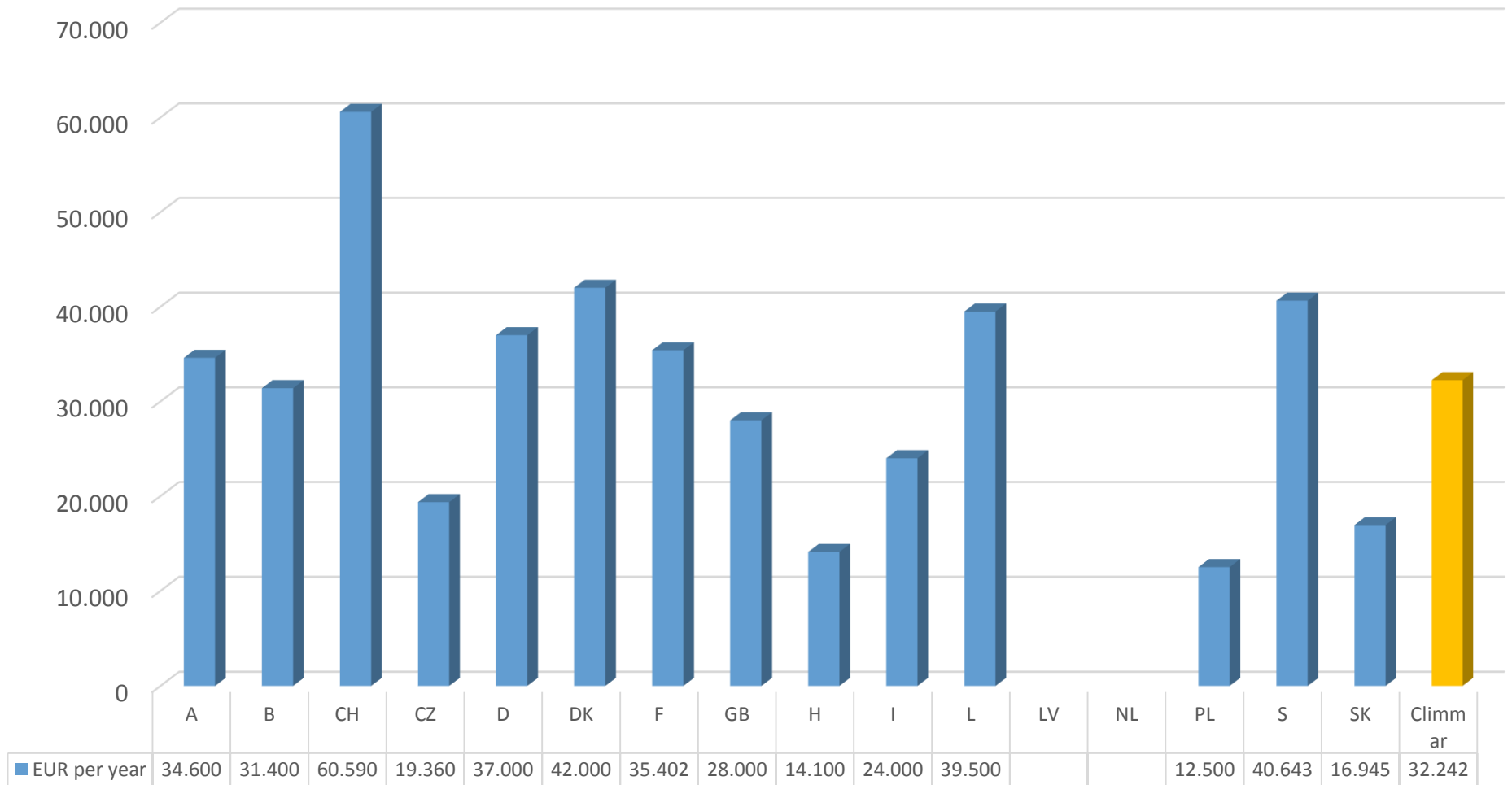
### Part III - Companies:

turnover-structure of the average CLIMMAR-dealer



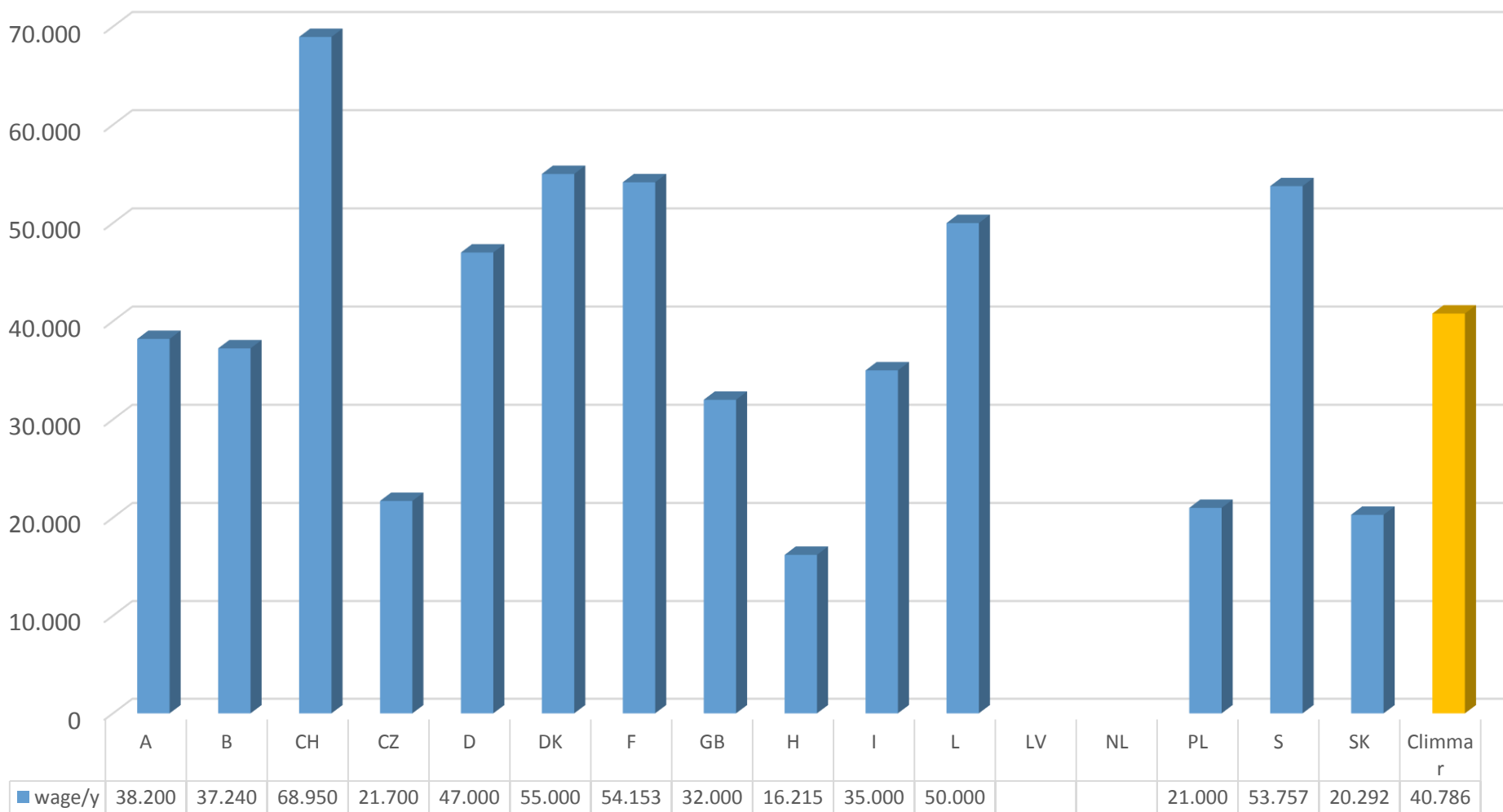
## Part III – Companies:

wage per year (average mechanic)



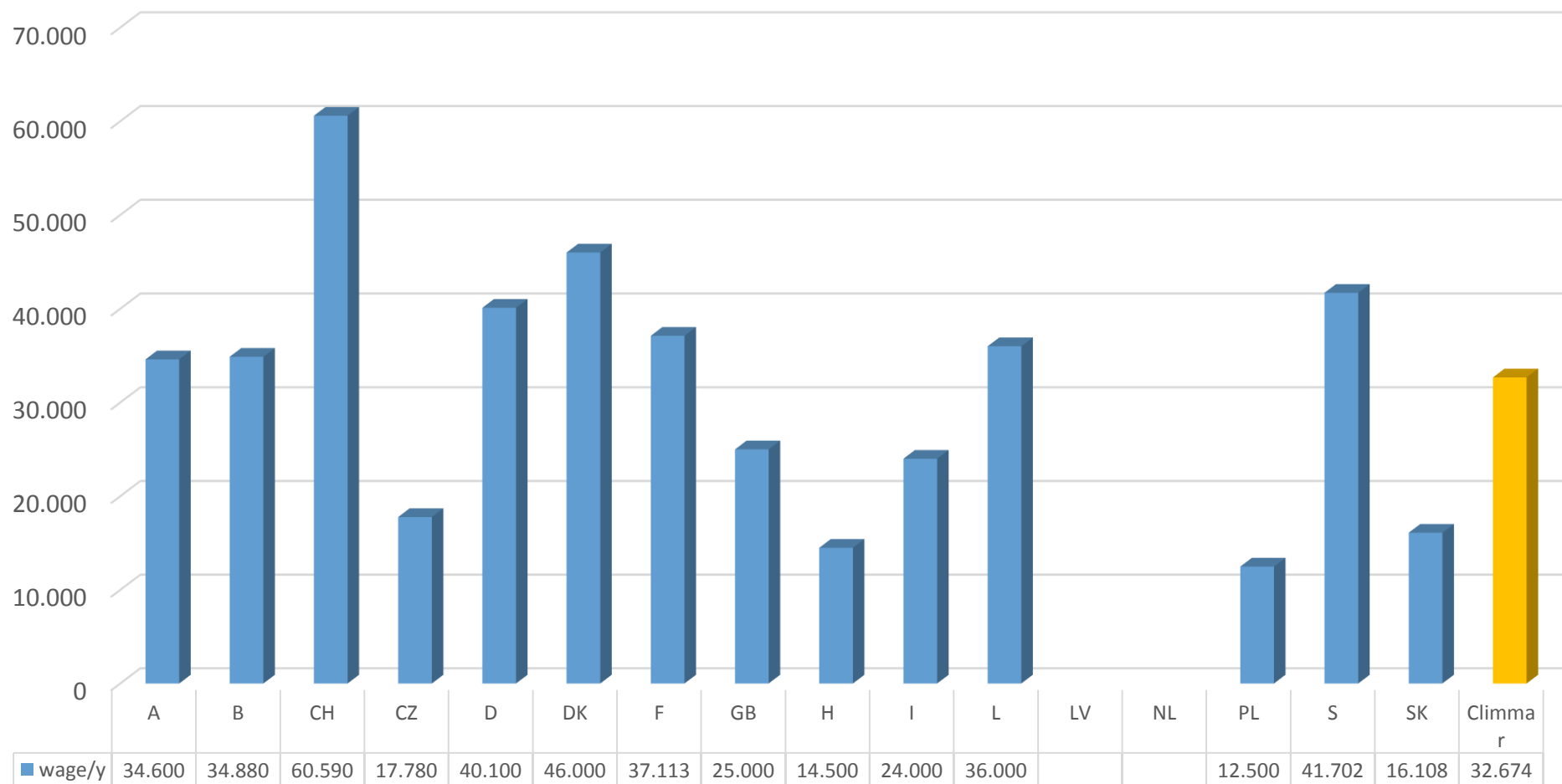
## Part III – Companies:

### wage per year (workshop-master)



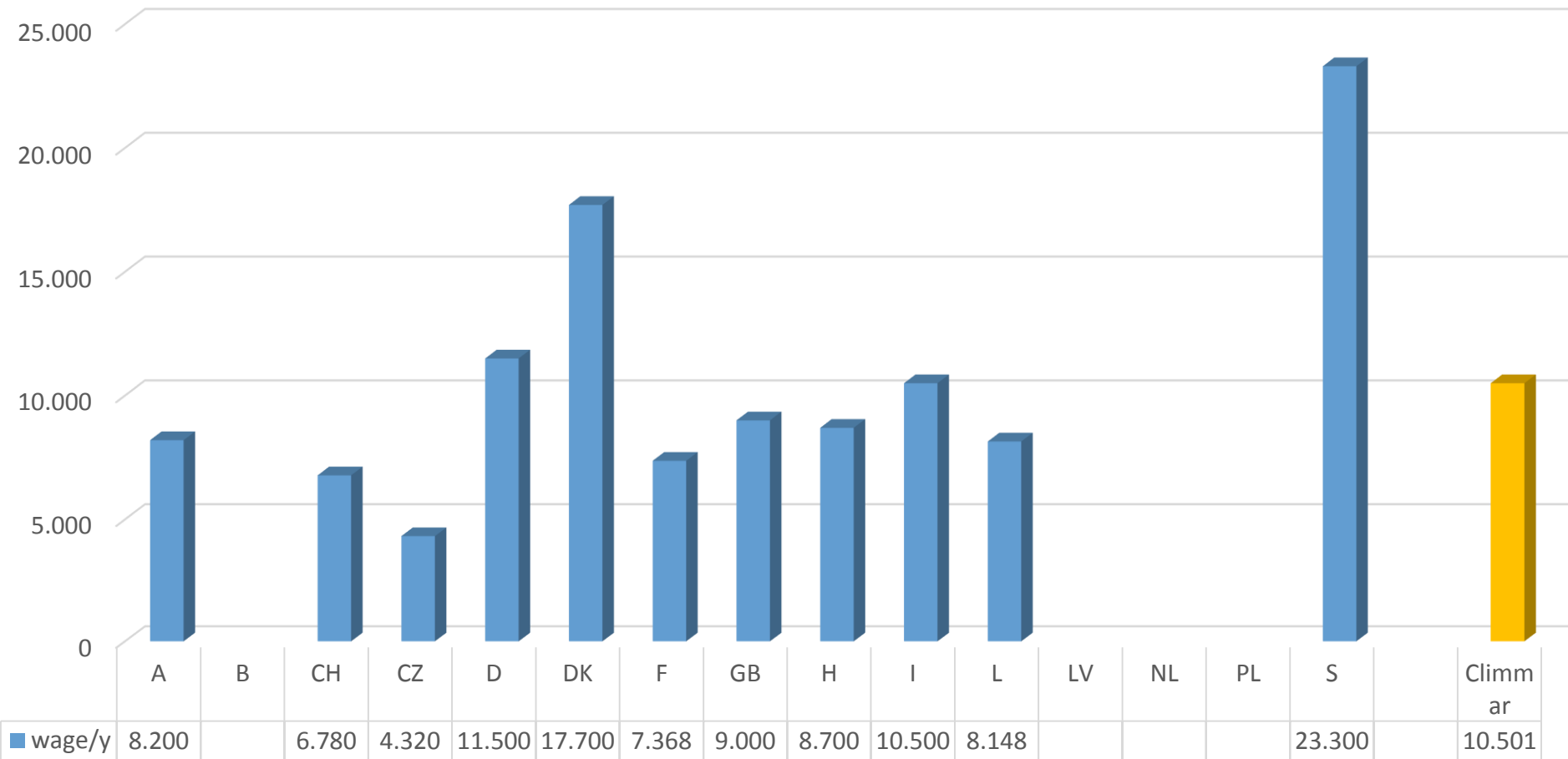
## Part III – Companies:

wage per year (partsman)



### Part III – Companies:

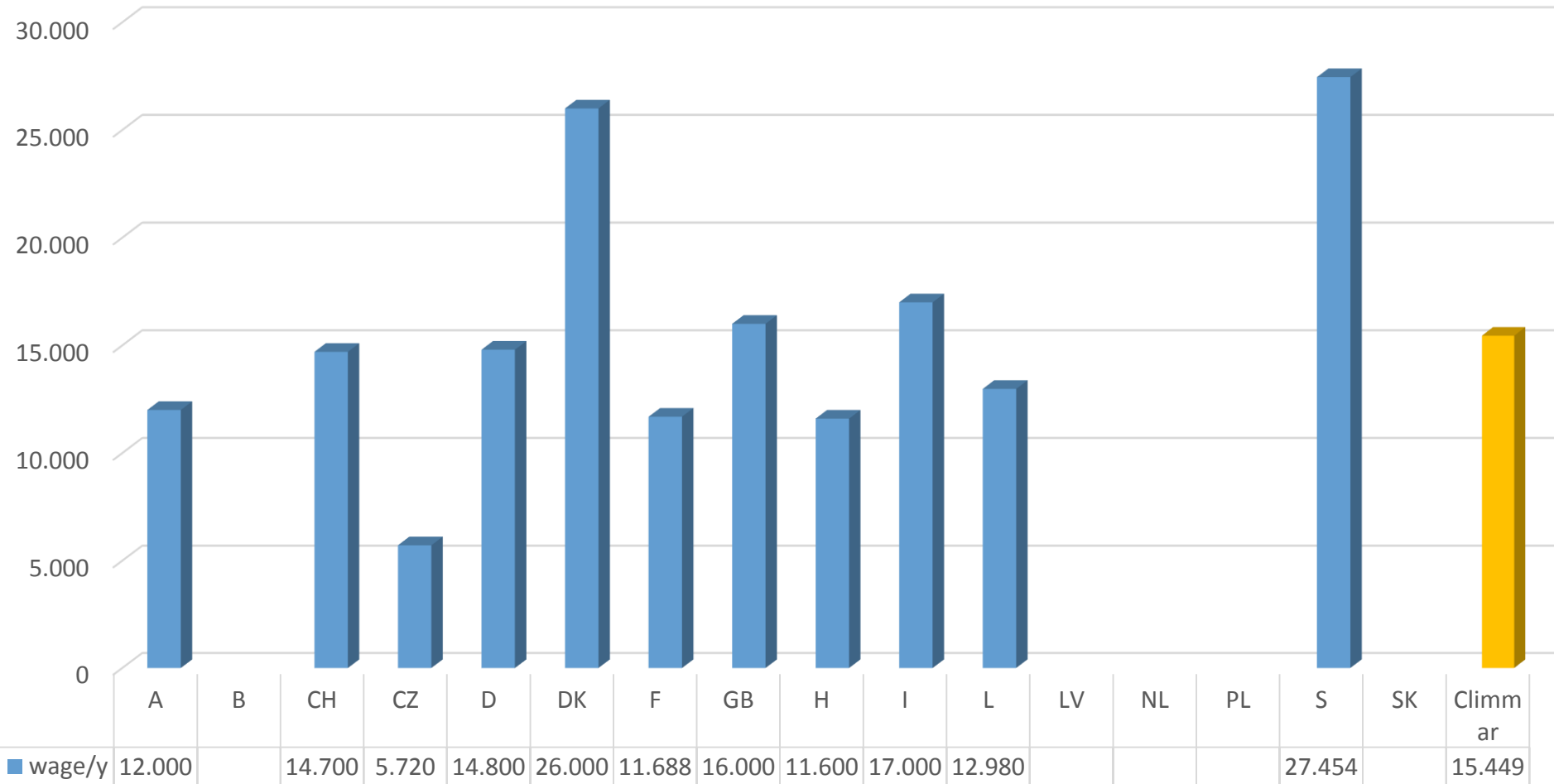
wage per year (apprentice, 1st year)





# Part III – Companies:

## wage per year (apprentice, 4th year)



**Survey 2018 – results for:**

 **Dealers view –  
warranty conditions**

## Part IV – Warranty Conditions:

CLIMMAR Branch Report: **Warranty & Manufacturer conditions** (1st of July 2018)

*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                                        |
|                                                                       | <i>Communications channel</i>              | Online, own EDP system                                          |
| Submission                                                            | <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                                                              |
|                                                                       | <i>possible:</i>                           | Yes                                                             |
| Extension of warranty for new machine                                 | <i>yes / no</i>                            | (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 2018

|                                                    |         | A        | B        | CH       | CZ       | D        | DK       | F        | GB       | H | I | L        | LV | NL | PL       | S | SK       | sum |
|----------------------------------------------------|---------|----------|----------|----------|----------|----------|----------|----------|----------|---|---|----------|----|----|----------|---|----------|-----|
| warranty-conditions in details available (English) | JD      | <b>x</b> | <b>x</b> | <b>x</b> | <b>x</b> | <b>x</b> | <b>x</b> | <b>x</b> | <b>x</b> | o | o | <b>x</b> | o  | o  | <b>x</b> | o | o        | 10  |
|                                                    | NH      | <b>x</b> | <b>x</b> | <b>x</b> | o        | <b>x</b> | <b>x</b> | <b>x</b> | <b>x</b> | o | o | <b>x</b> | o  | o  | <b>x</b> | o | <b>x</b> | 10  |
|                                                    | Claas   | <b>x</b> | <b>x</b> | <b>x</b> | <b>x</b> | <b>x</b> | <b>x</b> | <b>x</b> | o        | o | o | o        | o  | o  | o        | o | o        | 7   |
|                                                    | MF      | <b>x</b> | <b>x</b> | <b>x</b> | o        | <b>x</b> | <b>x</b> | <b>x</b> | <b>x</b> | o | o | <b>x</b> | o  | o  | o        | o | o        | 8   |
|                                                    | SDF     | <b>x</b> | <b>x</b> | <b>x</b> | o        | <b>x</b> | <b>x</b> | <b>x</b> | o        | o | o | <b>x</b> | o  | o  | o        | o | <b>x</b> | 7   |
|                                                    | Case    | <b>x</b> | <b>x</b> | <b>x</b> | o        | <b>x</b> | <b>x</b> | o        | o        | o | o | <b>x</b> | o  | o  | o        | o | o        | 6   |
|                                                    | Valtra  | <b>x</b> | o        | <b>x</b> | o        | <b>x</b> | <b>x</b> | <b>x</b> | <b>x</b> | o | o | <b>x</b> | o  | o  | o        | o | o        | 7   |
|                                                    | Fendt   | <b>x</b> | <b>x</b> | <b>x</b> | o        | o        | <b>x</b> | <b>x</b> | <b>x</b> | o | o | <b>x</b> | o  | o  | o        | o | <b>x</b> | 7   |
|                                                    | Kubota  | o        | <b>x</b> | <b>x</b> | o        | o        | o        | <b>x</b> | <b>x</b> | o | o | o        | o  | o  | o        | o | <b>x</b> | 5   |
|                                                    | Landini | o        | o        | o        | o        | o        | <b>x</b> | o        | o        | o | o | o        | o  | o  | o        | o | <b>x</b> | 2   |



# Projectteam 2 (Services - Data & Surveys)



| survey-part            | country:         | A   | B   | CH  | CZ  | D   | DK  | F   | GB  | H   | I   | L   | LV | NL  | PL  | S   | SK  | CLIMMAR |
|------------------------|------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|----|-----|-----|-----|-----|---------|
| market & structures    | basics           | 90  | 100 | 100 | 100 | 100 | 100 | 100 | 30  | 100 | 100 | 100 | 0  | 100 | 40  | 100 | 80  | 84      |
|                        | segments         | 0   | 100 | 100 | 100 | 75  | 75  | 75  | 0   | 0   | 50  | 100 | 0  | 100 | 0   | 100 | 25  | 56      |
| markets trends         | comparison       | 100 | 100 | 100 | 100 | 100 | 100 | 80  | 100 | 100 | 100 | 100 | 0  | 100 | 100 | 100 | 100 | 93      |
|                        | expectations     | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 0  | 100 | 100 | 100 | 100 | 94      |
| companies' structures  | turnover         | 100 | 15  | 100 | 100 | 100 | 100 | 100 | 0   | 100 | 100 | 0   | 0  | 100 | 0   | 100 | 100 | 70      |
|                        | costs            | 0   | 80  | 0   | 100 | 100 | 0   | 40  | 0   | 0   | 0   | 0   | 0  | 0   | 0   | 0   | 0   | 20      |
|                        | wages            | 100 | 70  | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 0   | 0  | 0   | 70  | 100 | 70  | 76      |
| summary: participation | oblig. questions | 98  | 71  | 100 | 100 | 100 | 100 | 95  | 58  | 100 | 100 | 50  | 0  | 75  | 53  | 100 | 88  | 80      |
|                        | free questions   | 33  | 93  | 67  | 100 | 92  | 58  | 72  | 33  | 33  | 50  | 67  | 0  | 67  | 33  | 67  | 42  | 57      |
| tendency:              |                  | →   | ↗   | →   | →   | →   | →   | →   | ↘   | ↘   | ↘   | →   | ↘  | ↗   | →   | ↗   | →   | ↘       |

|  |                             |
|--|-----------------------------|
|  | obligatorily survey part    |
|  | free to fulfill survey part |

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

I wish us a tremendous participation

The collage displays several forms from the CLIMMAR Branch Report, which is a survey for the European roof of the national branch associations, CLIMMAR.

- CLIMMAR Branch Report: Companies average data:** A form for reporting company average data for 2017. It includes sections for Turnover-structures (new equipment, second hand equipment, workshop, parts, externalists, total turnover) and Costs-structures (bought equipment, total gross margin, personal contributions, social contributions, accident insurances, depreciations, other real costs, result, calculative costs, real result). It also includes a section for The Employees (average mechanic, workshop-master, parts-man, trainee, trainee (4th year) or beginner) and Basics (weekly working hours, yearly holidays). A legend indicates that orange boxes are obligatory to fulfill and green boxes are free to fulfill.
- CLIMMAR Branch Report: Markets and structures:** A form for reporting market and structure data. It includes sections for number of companies in the branch, organisation level (company-units, marketshare), number of employees, number of apprentices, turnover (in 1.000 EUR), and segments (registrations or sales) for various types of vehicles (tractors, harvesters, balers, mowers, harrows, etc.).
- CLIMMAR Branch Report: Trends:** A form for reporting trends. It includes a section for Comparison to same periode last year (turnover total, turnover machinery, new machinery, second hand machinery, turnover workshop, turnover spare parts, costs, employees, stock, investment) and a section for Expectation for the following year (turnover total, turnover machinery, new machinery, second hand machinery, turnover workshop, turnover spare parts, costs, employees, stock, investment).
- CLIMMAR Branch Report: Manufacturers' current warranty-conditions:** A form for reporting manufacturers' current warranty-conditions. It includes a section for Warranty & Manufacturer conditions, with a table for reporting warranty conditions for various types of vehicles (tractors, harvesters, balers, mowers, harrows, etc.).

in May/June 2019



CLIMMAR Congress, 4-6 October 2018,  
Prague



# Hoping for a growing development

(hoping for a “change in daily work” in every members-association’s office)



## Thanks a lot for your patience!