

CLIMMAR Branch Report

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



Chairman: Ludger Gude, Vicepresident CLIMMAR



**CLIMMAR
Congress
2019**



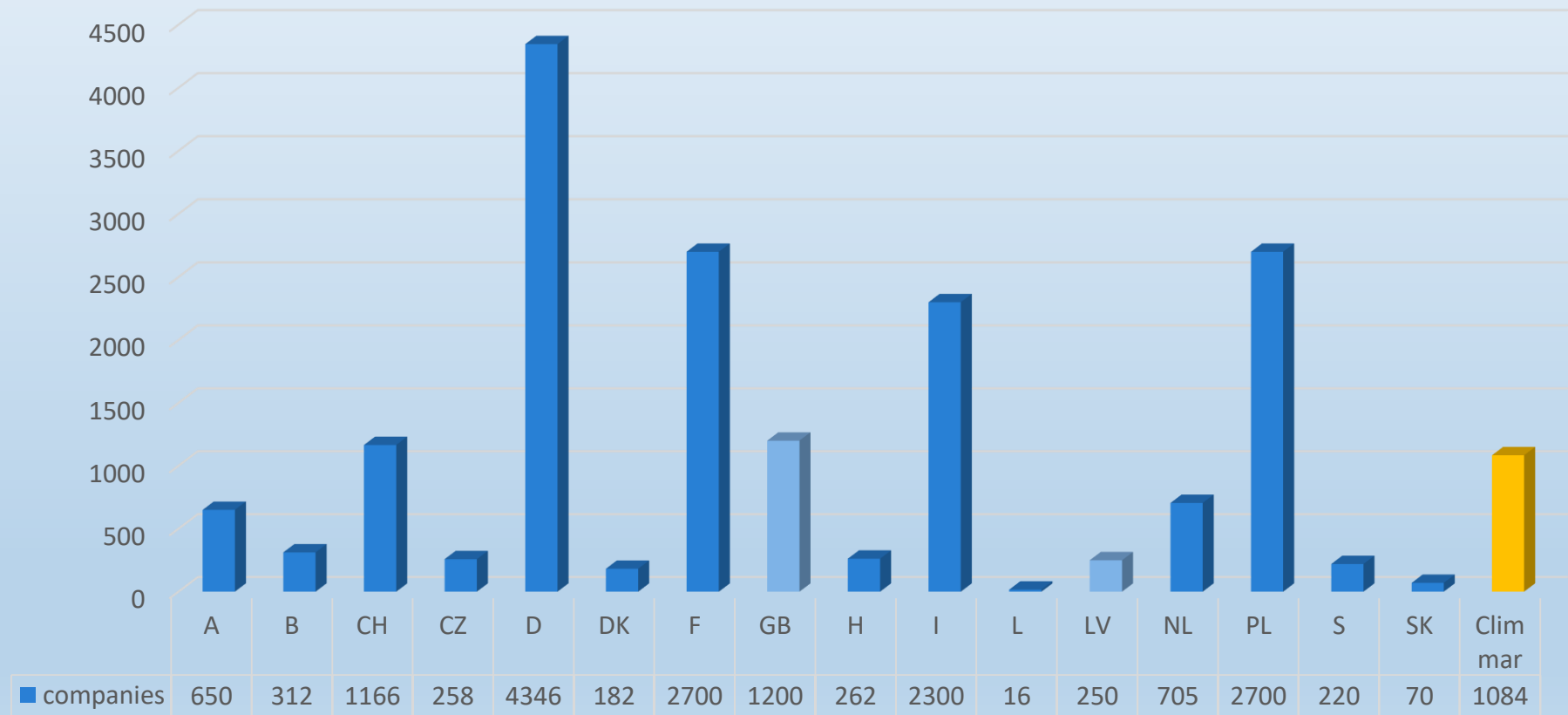
Thun 
Switzerland
24th–27th October

Survey 2019 aks for:

- national branch view - **markets & structures** (yearly)
- dealers view - **companies averages** (yearly)
- dealers view - **warranty conditions** (yearly)
- national Branch view - current situation: **trends** (halfyear)

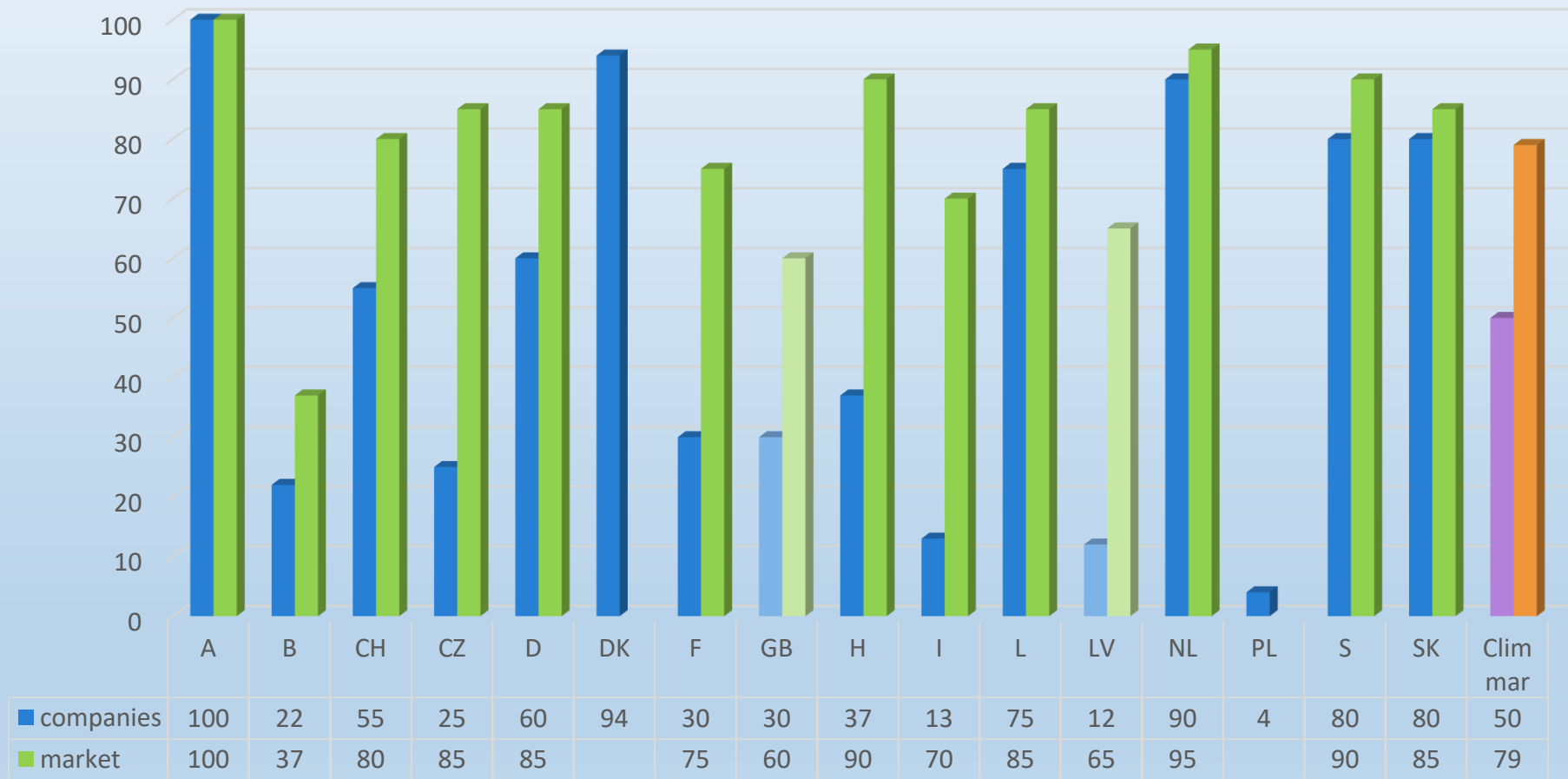
Presentation gives just a small view on similar items,
all CLIMMAR-member ass. get a complete version (of all details in
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number of Companies: 17,300 Dealers (incl. satellites) & Servicefirms



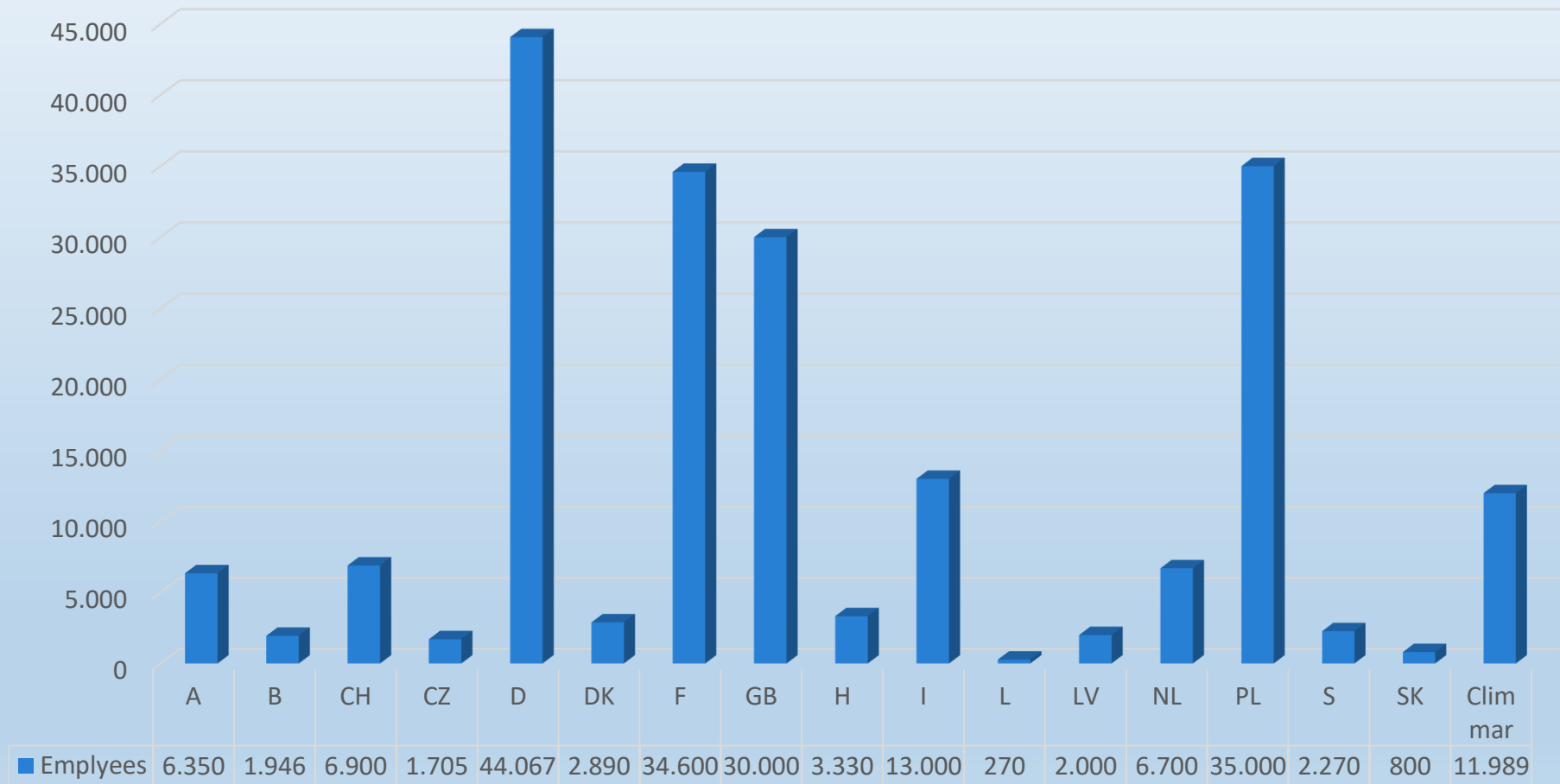
Source: CLIMMAR

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



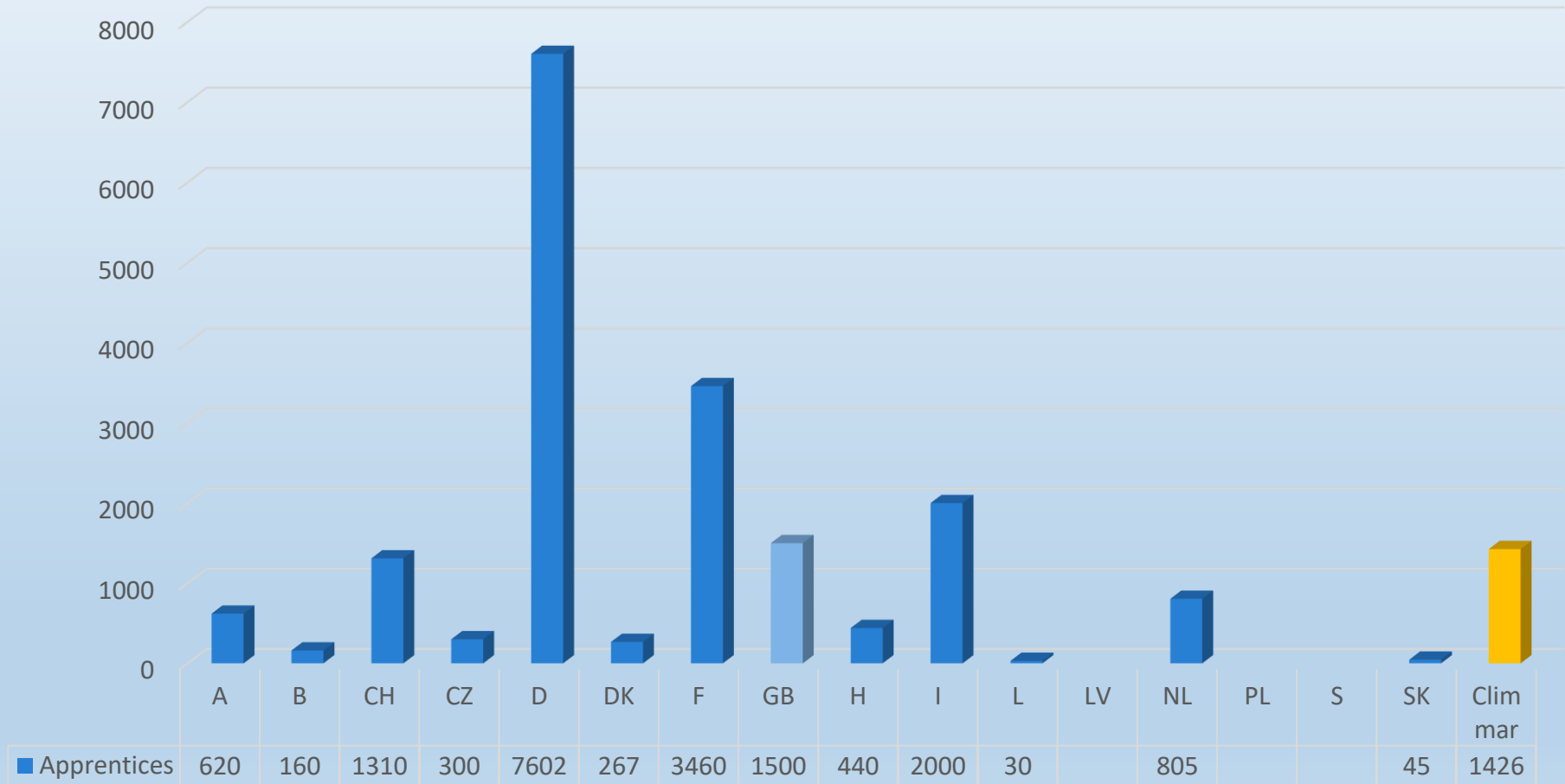
Source: CLIMMAR

close to 192,000 Employees



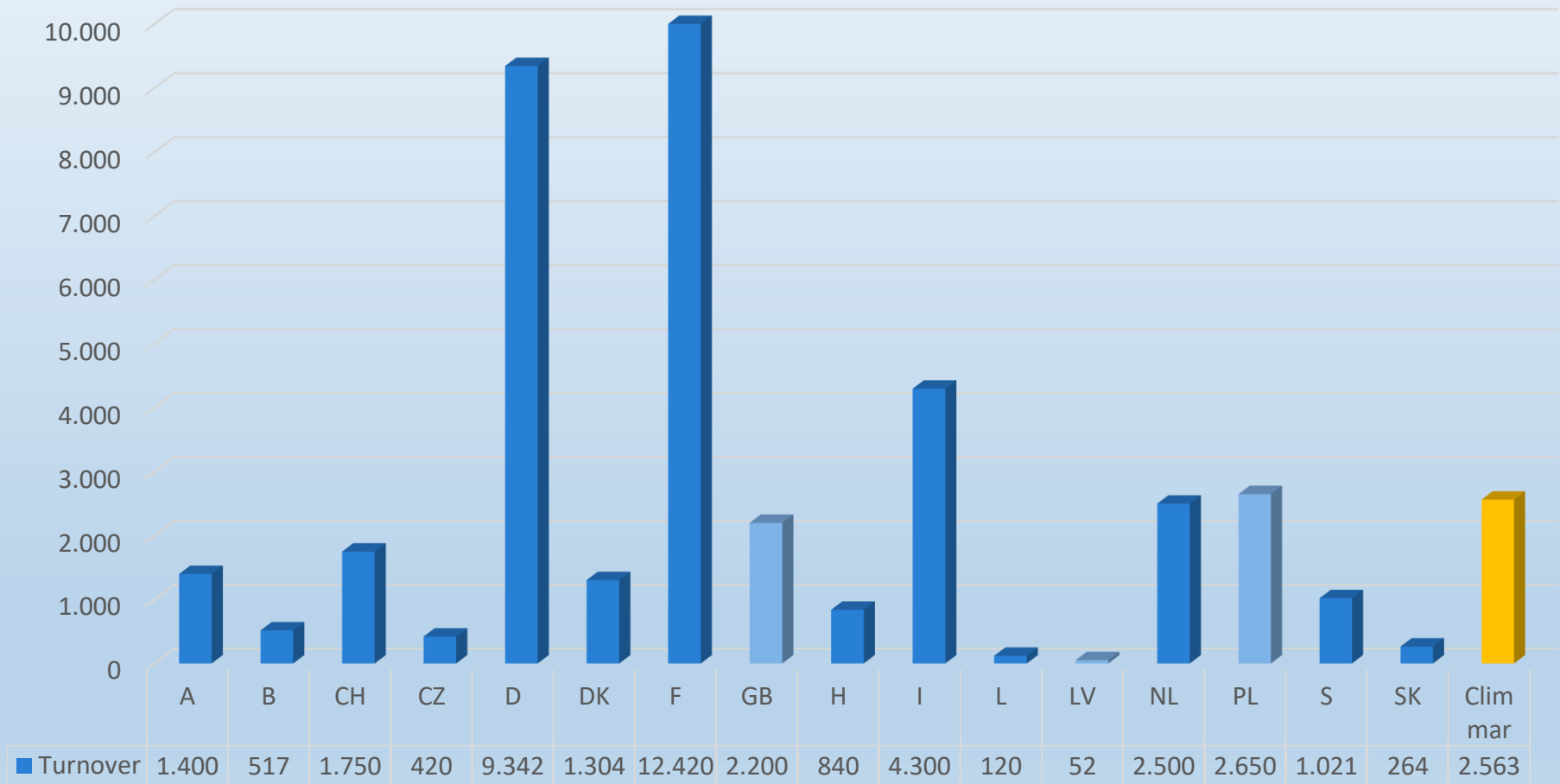
Source: CLIMMAR

about 18,500 Apprentices



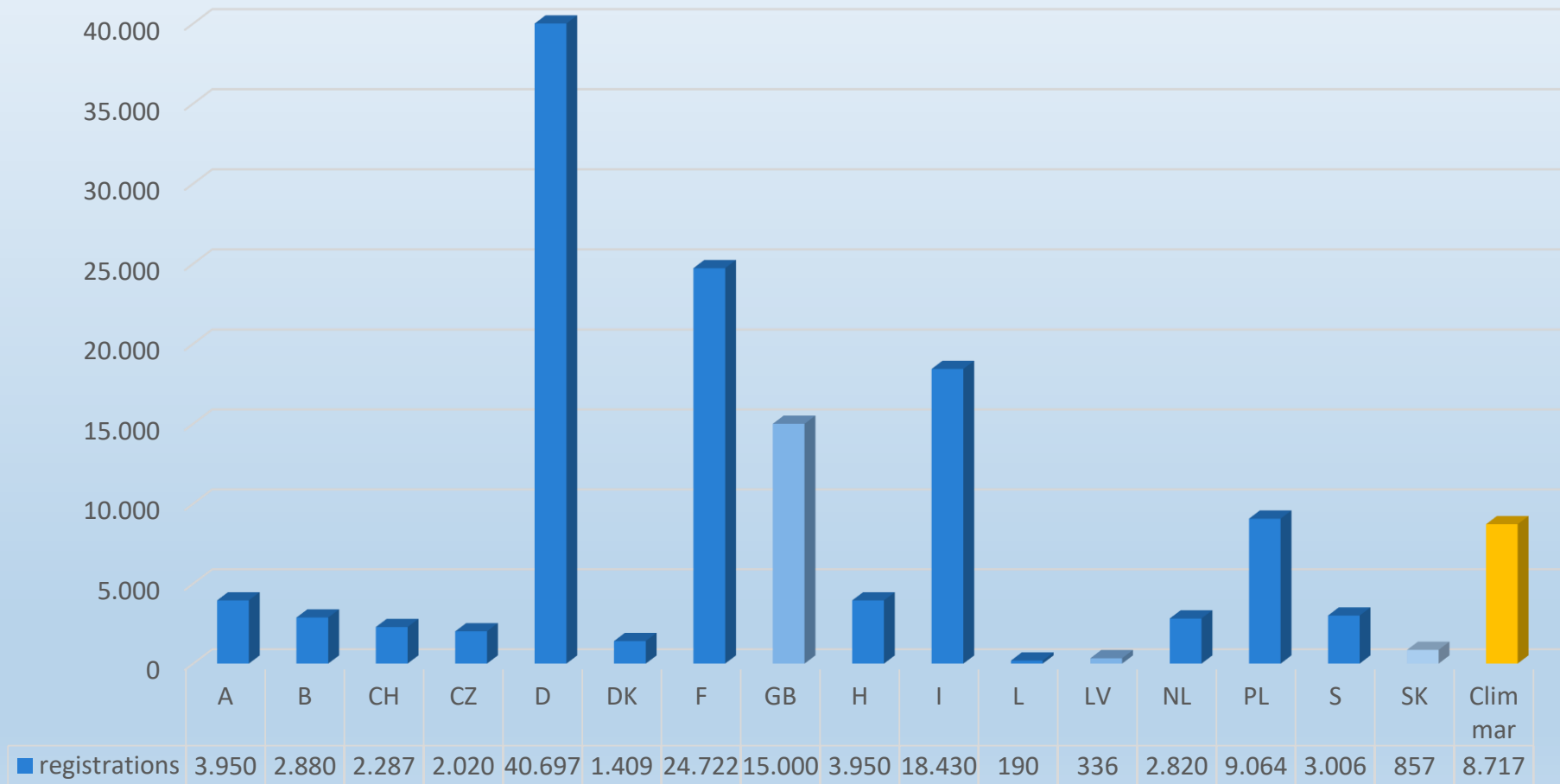
Source: CLIMMAR

Turnover (in 1.000 €): **38,500**



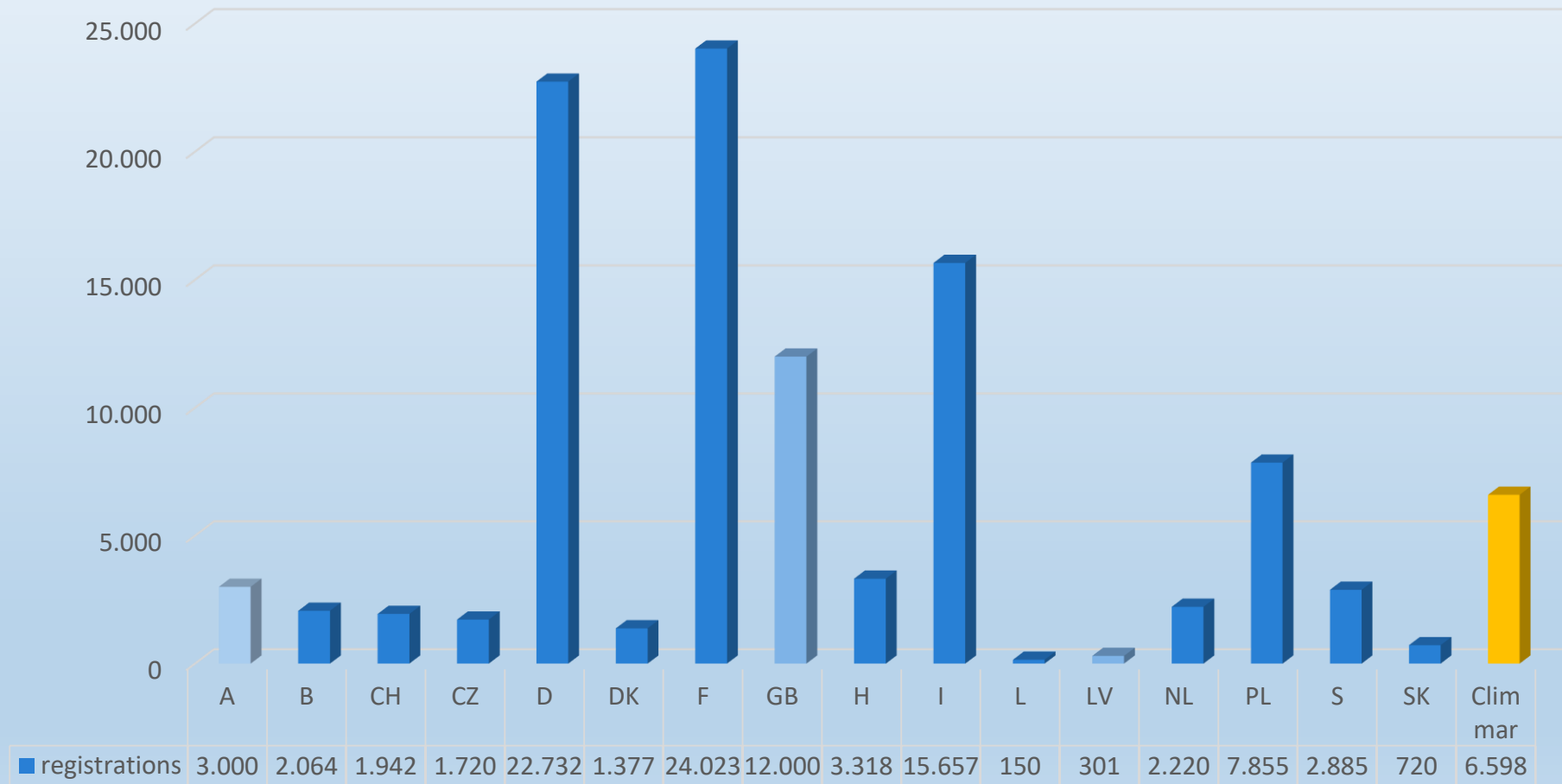
Source: CLIMMAR

Tractor Sales: **130,000** units



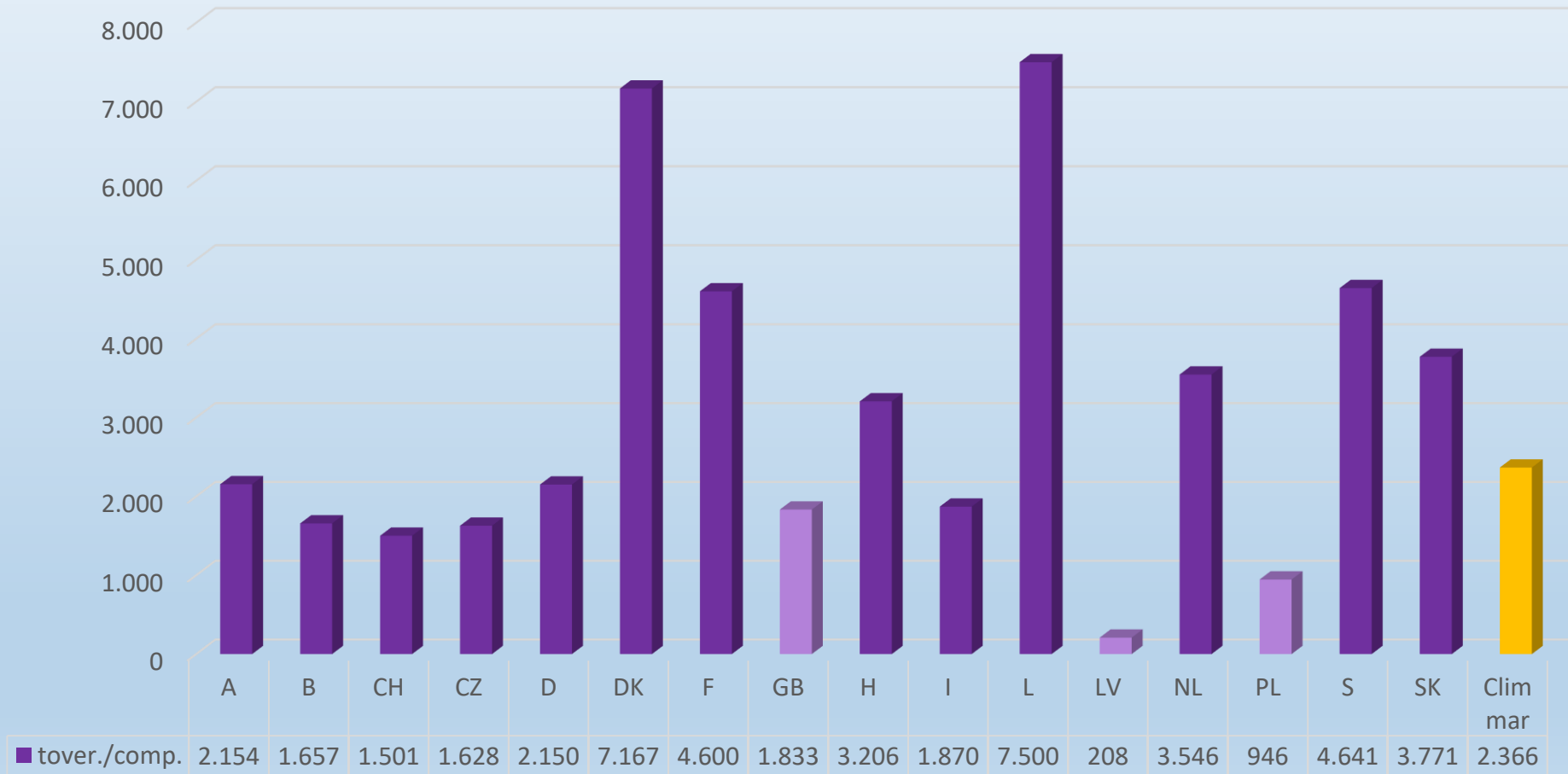
Source: CLIMMAR

Tractor Sales (50 hp or more): **99,000** units



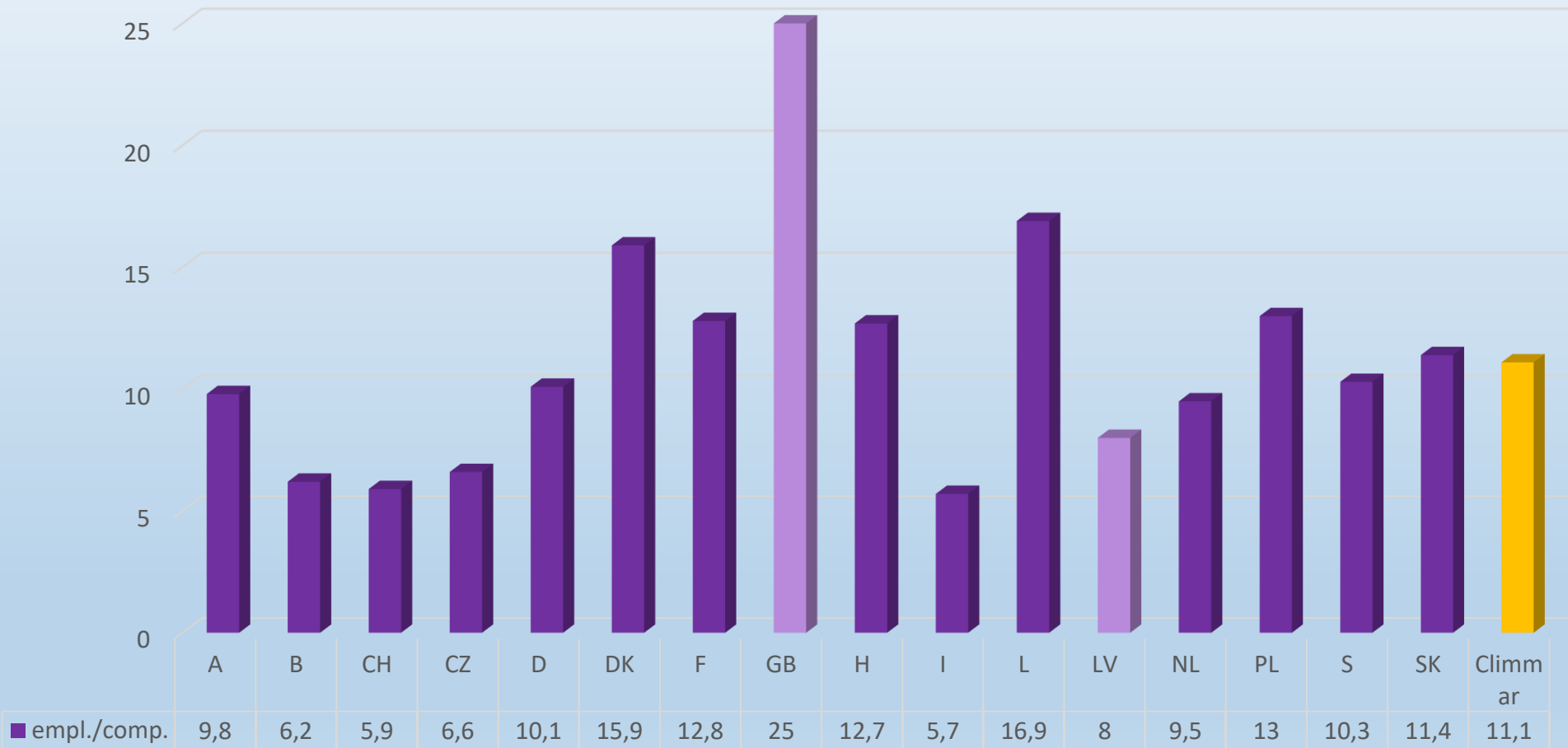
Source: CLIMMAR

Relations - Turnover per Company: **2,366** €/comp.



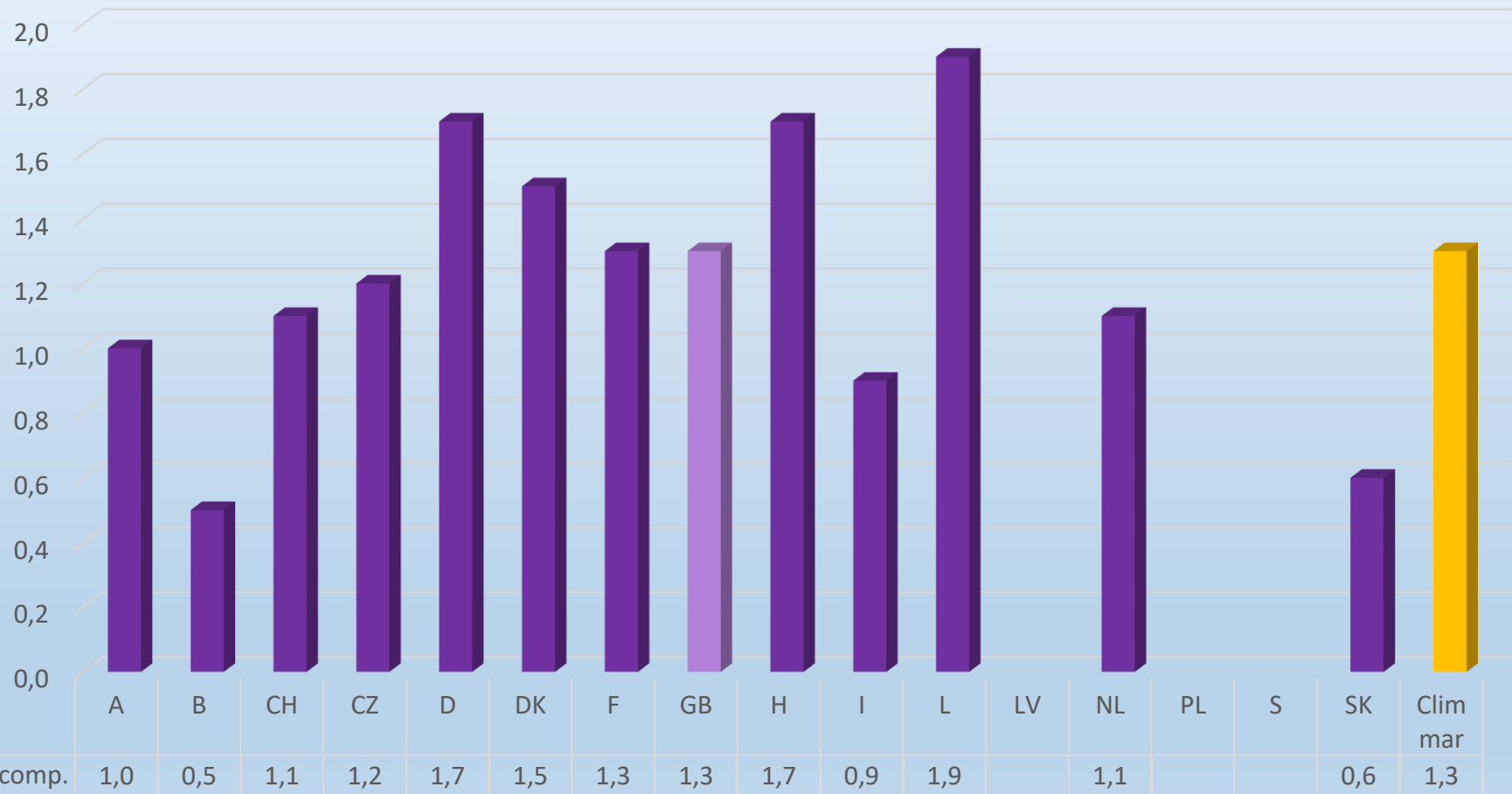
Source: CLIMMAR

Relations - Employees per Company: 11.1



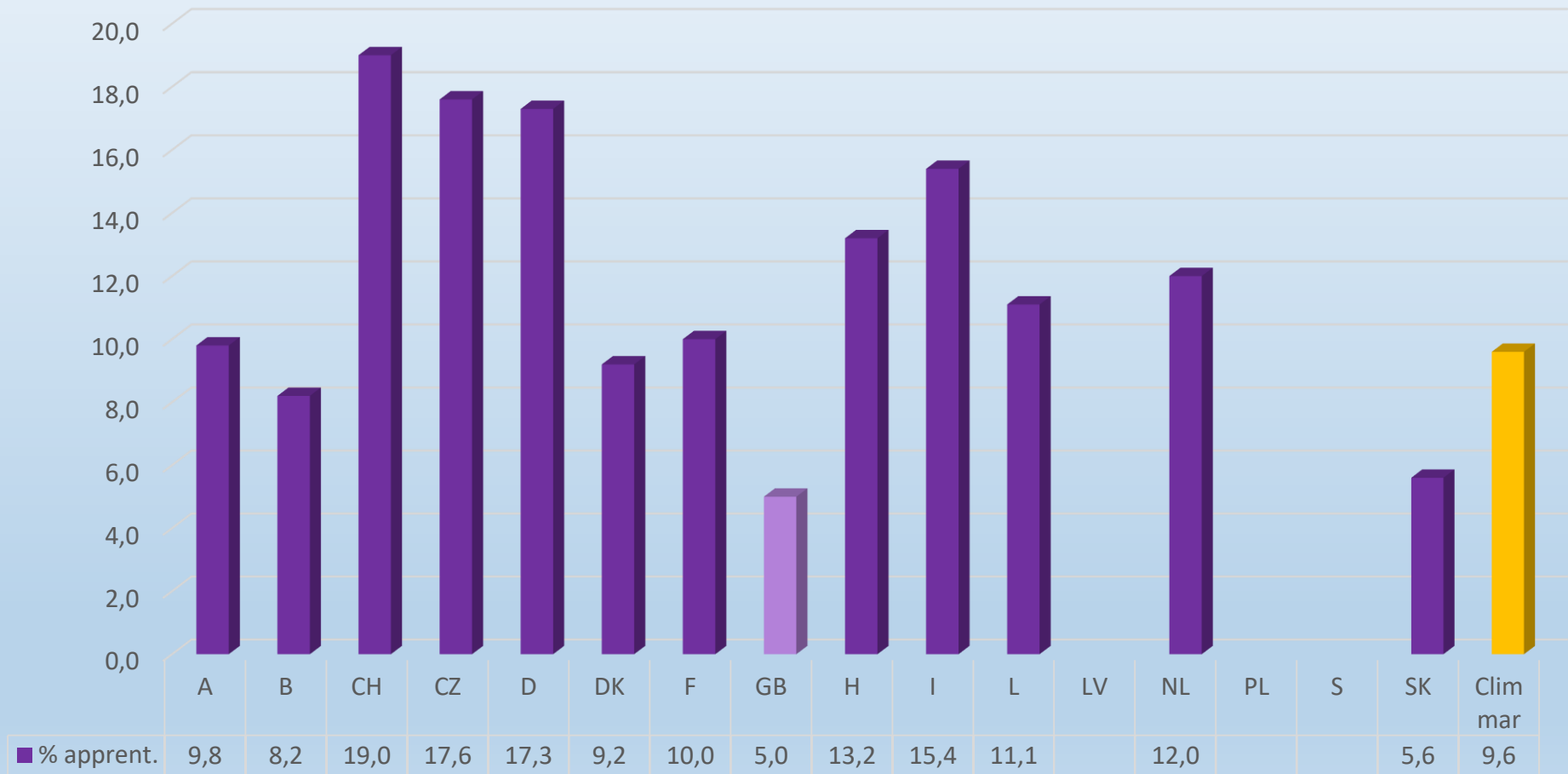
Source: CLIMMAR

Relations - Apprentices per Company: 1.3



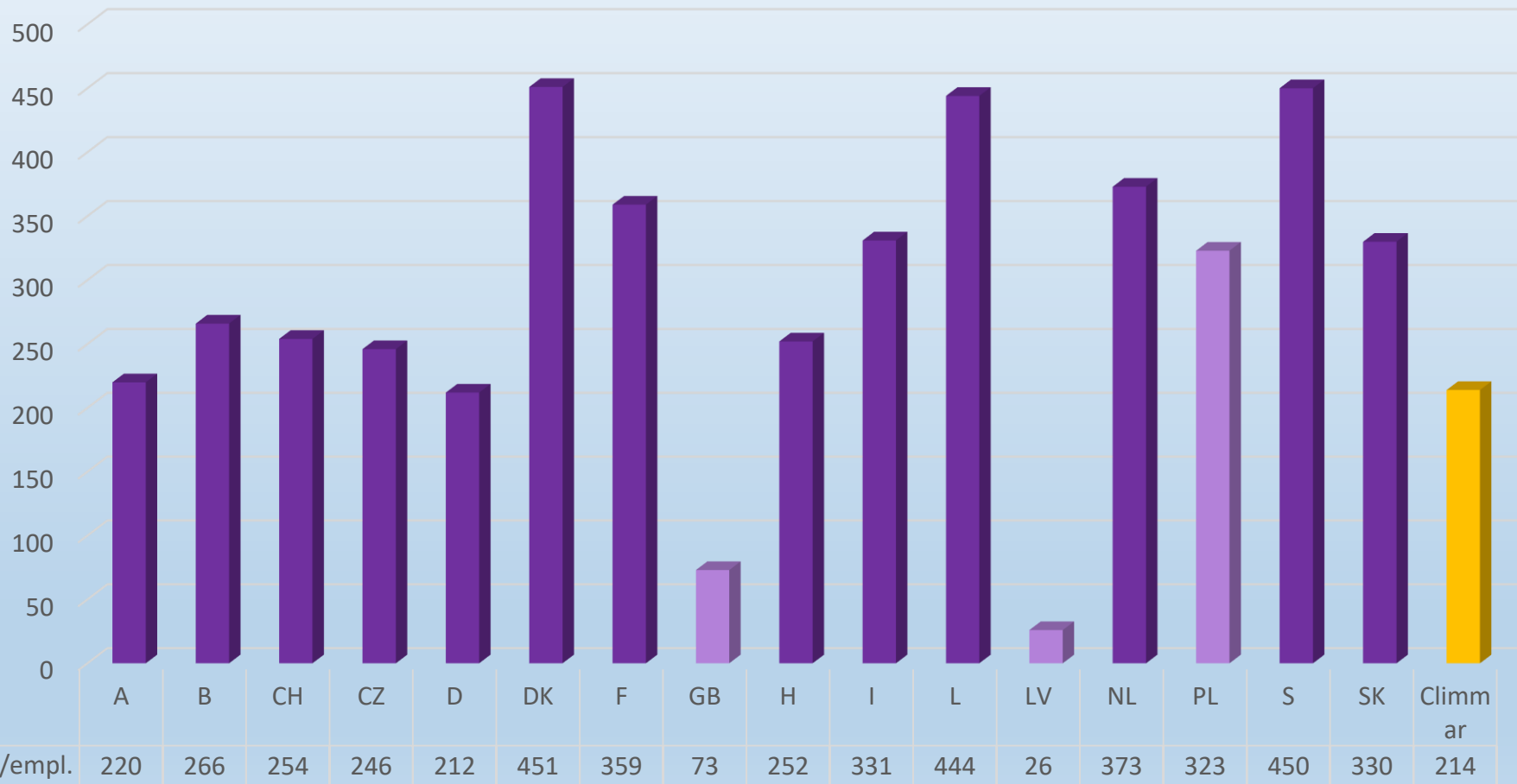
Source: CLIMMAR

Relations - % Apprentices (of Employees): 9.6



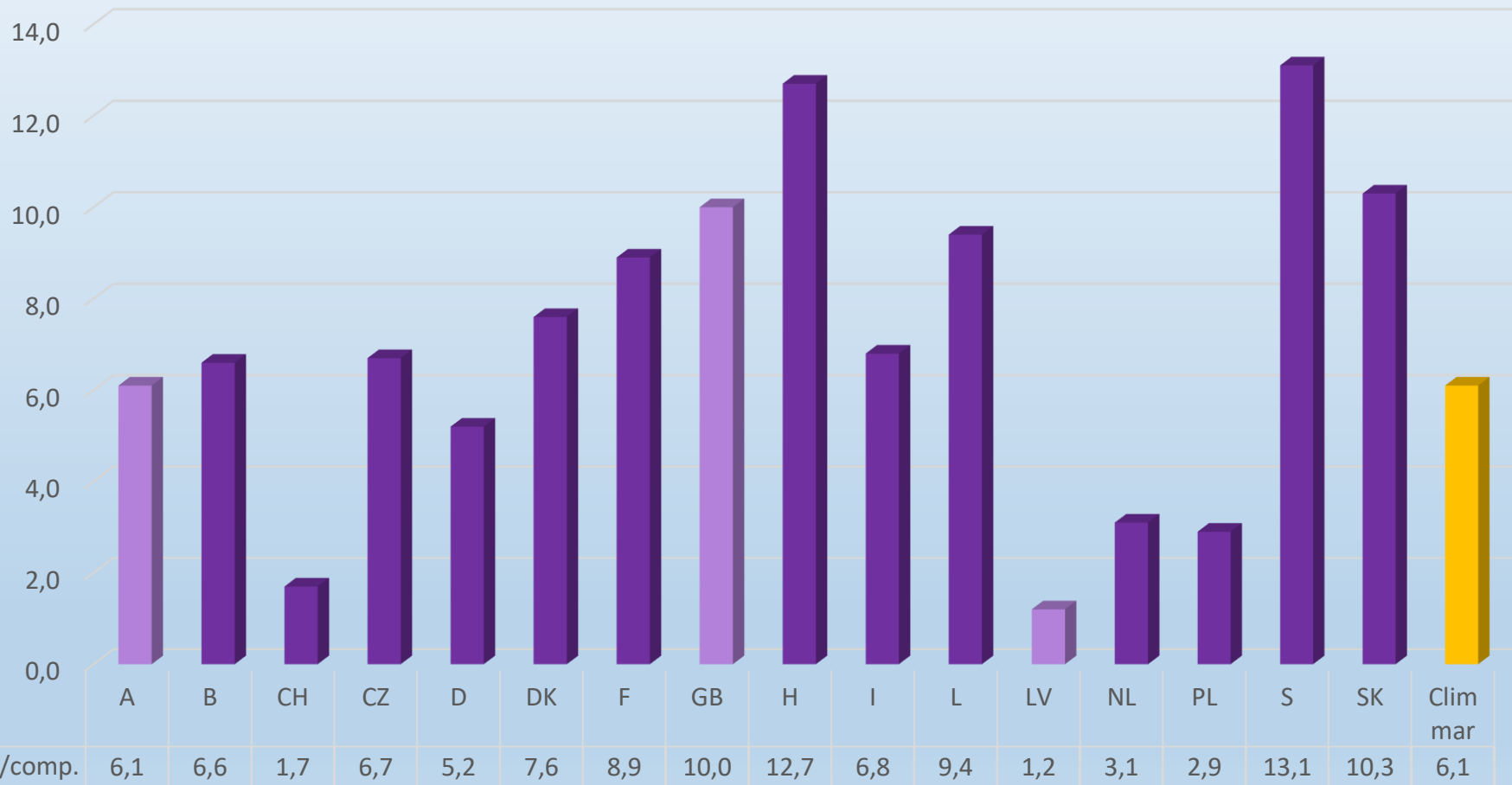
Source: CLIMMAR

Relations - Turnover per Employee: **214.000** €/pers.



Source: CLIMMAR

Relations - Tractor sales (>50 hp) per dealercompany: 6.1



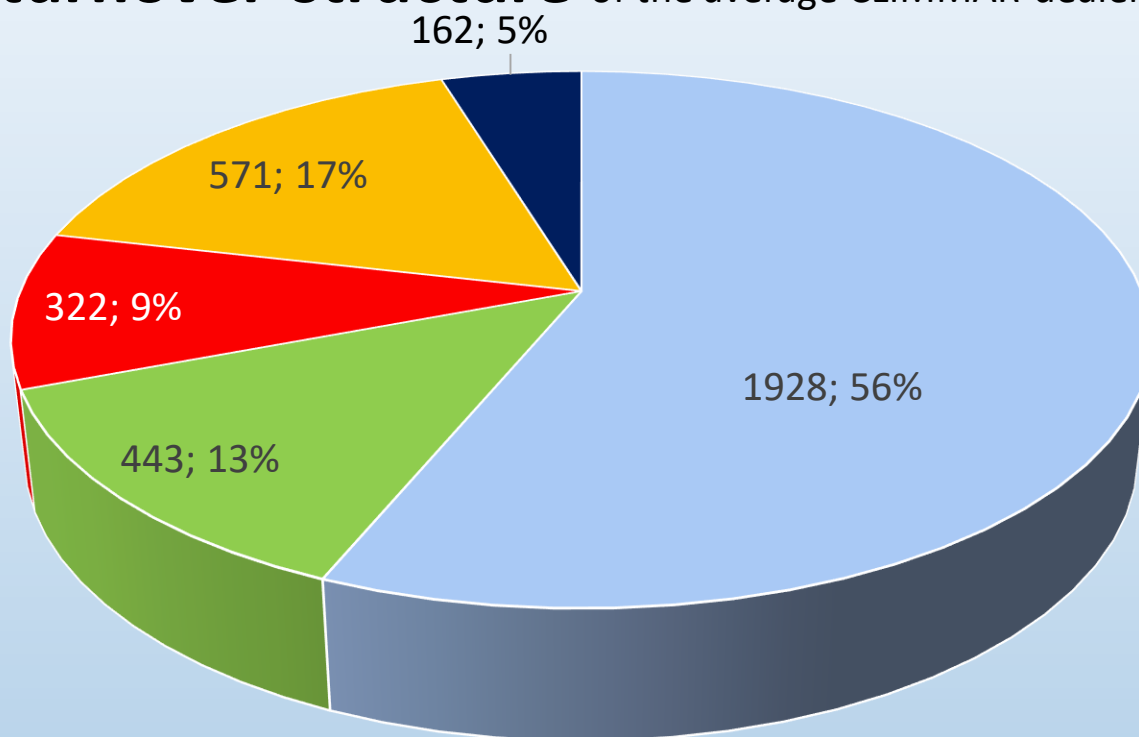
Source: CLIMMAR

Survey 2019 asks for:

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- dealers view - **warranty conditions** (yearly)
- national Branch view - current situation: **trends** (halfyear)

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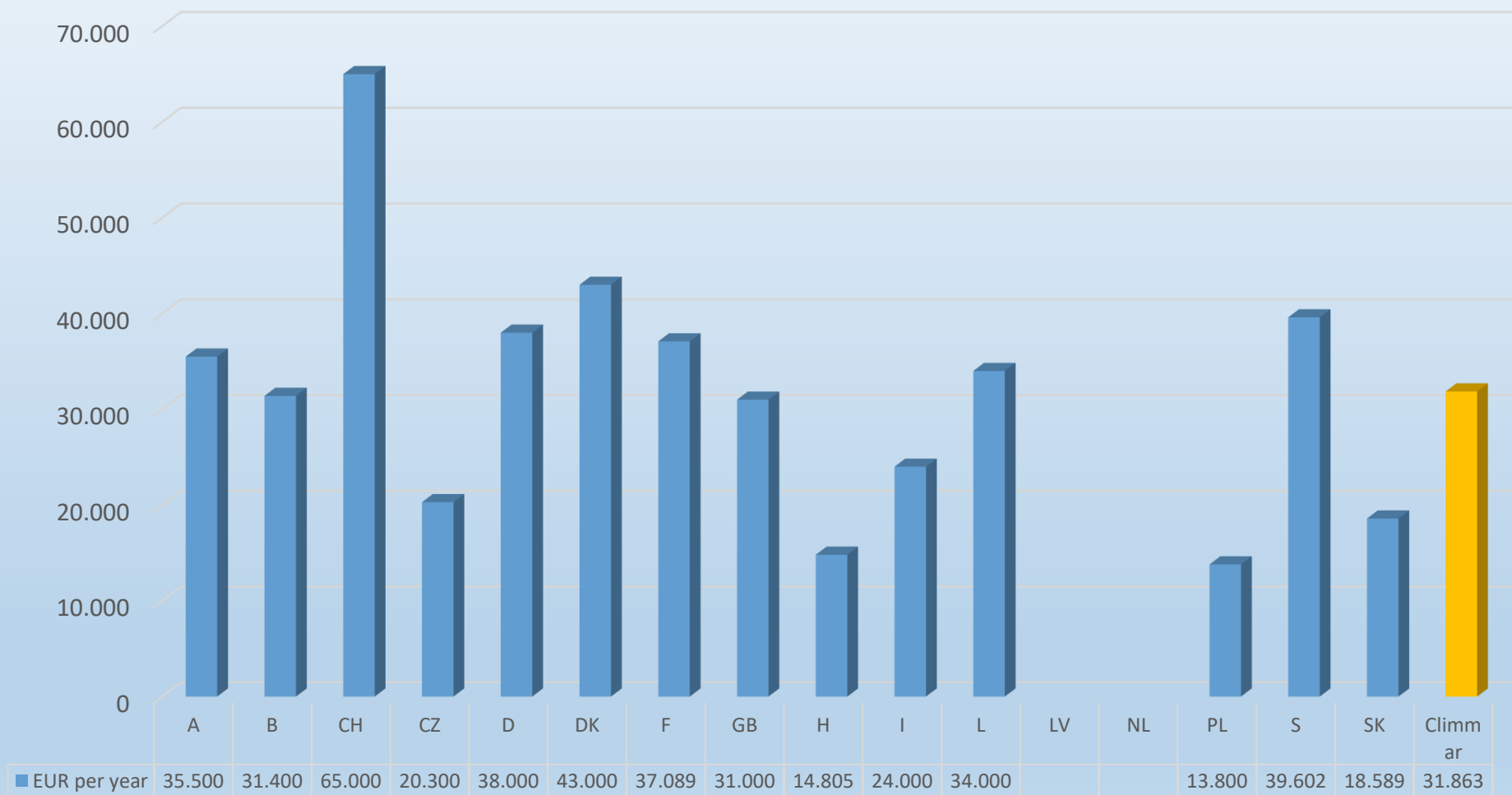
turnover-structure of the average CLIMMAR-dealer



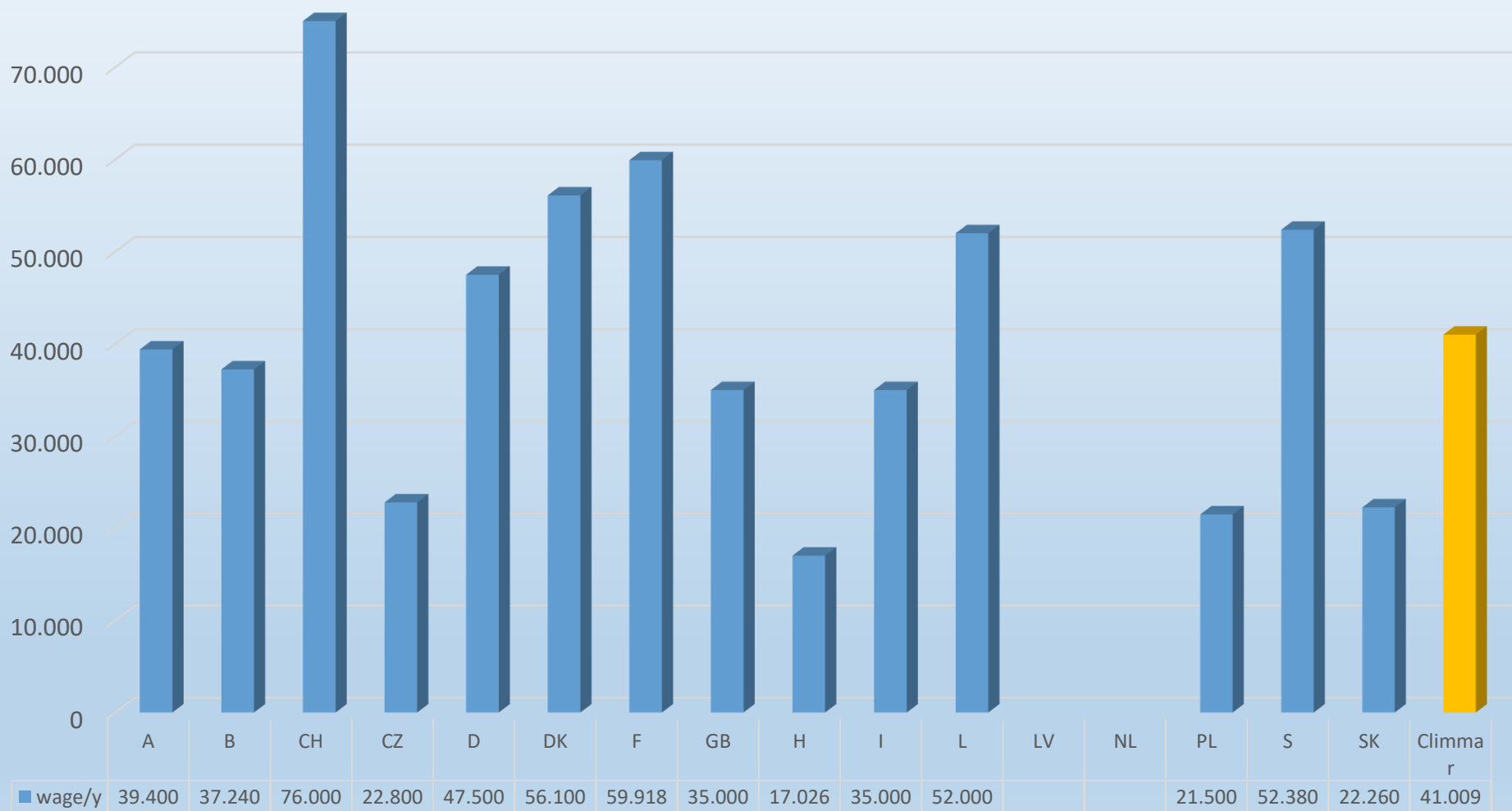
total:
3,400,000 €/comp.

 new equipm.  second hand  workshop  parts  externals

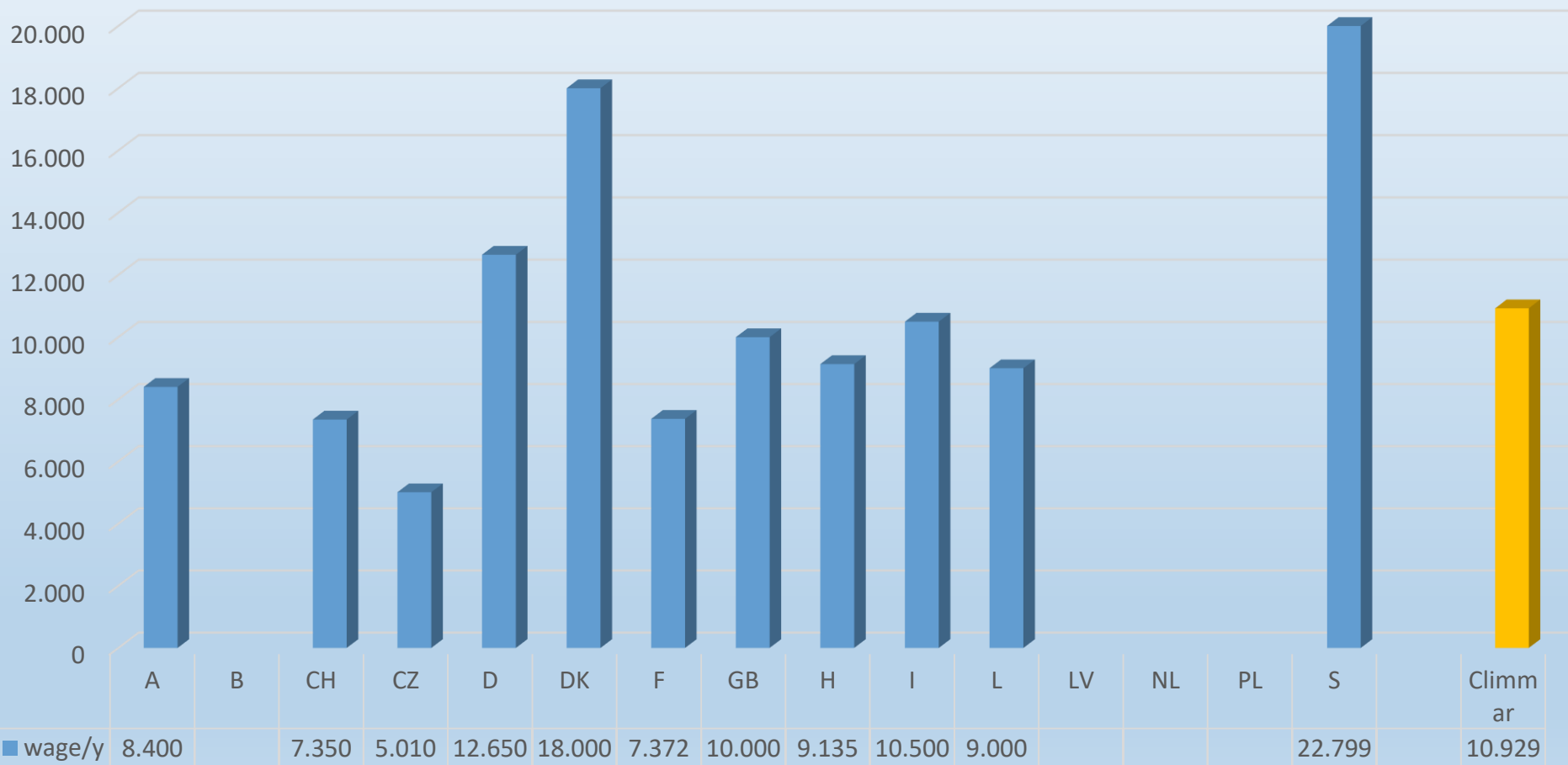
wage per year (average mechanic): **32,000 €**



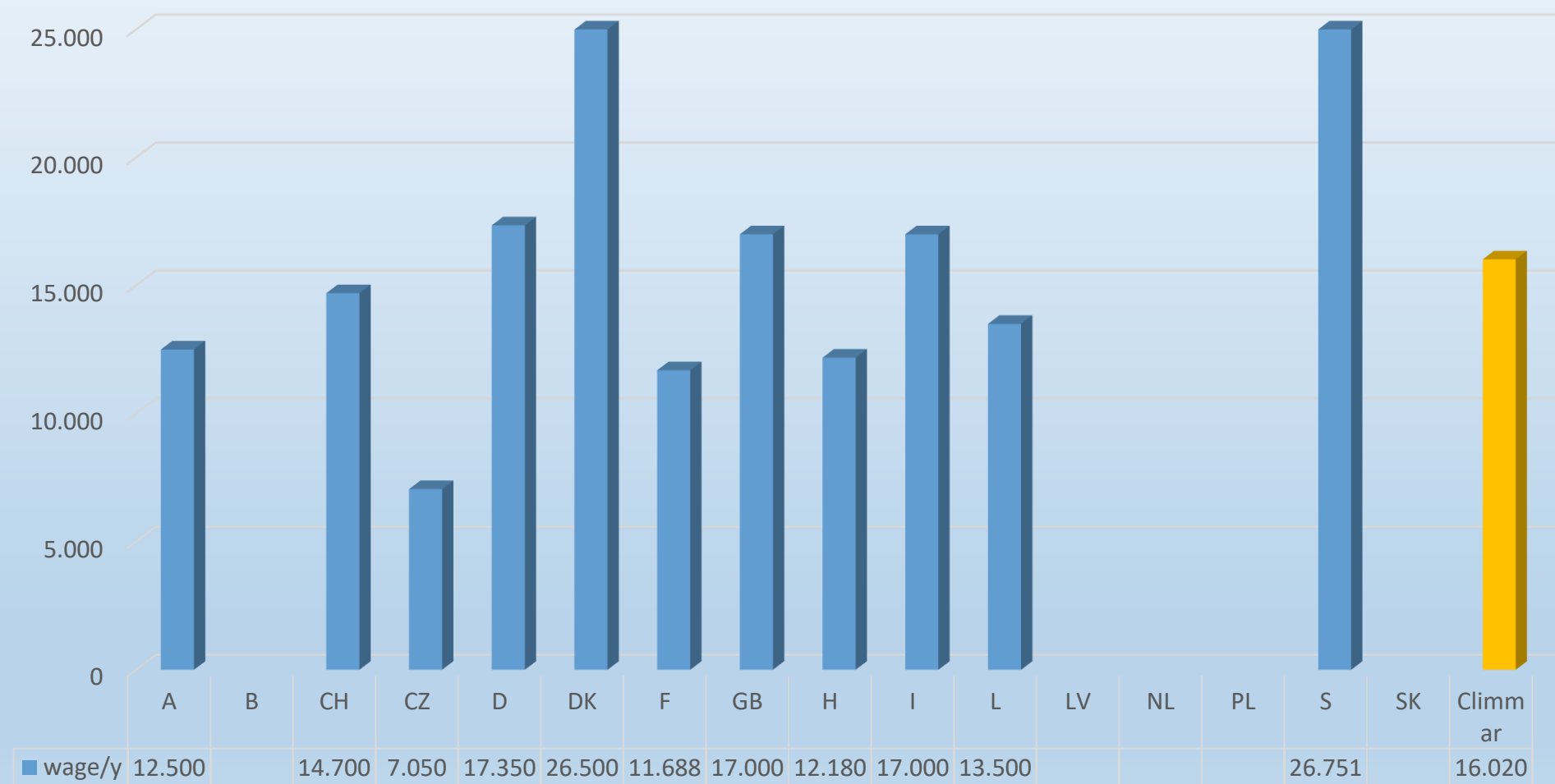
wage per year (workshop-master): **41,000 €**



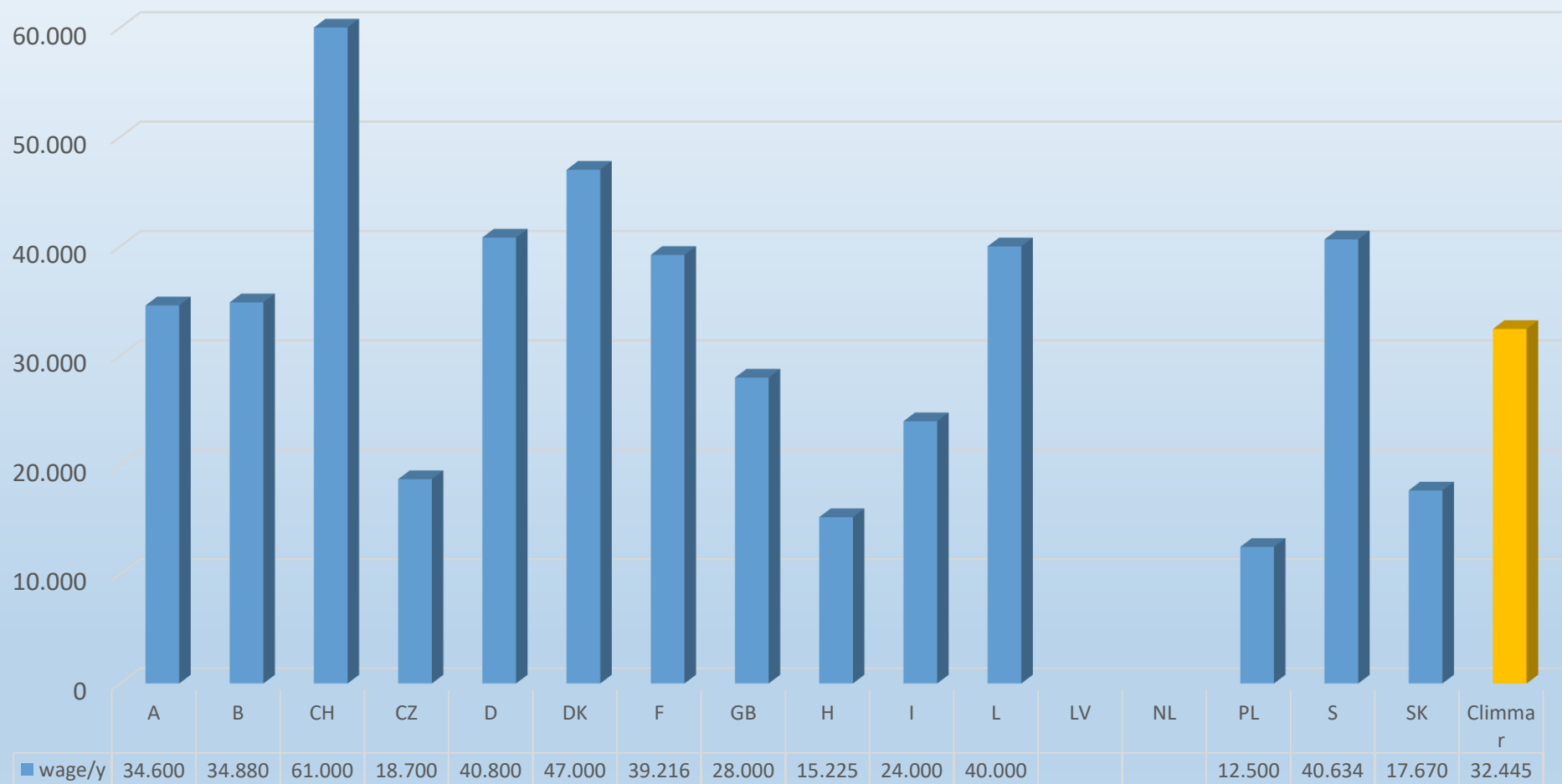
wage per year (apprentice, 1st year): **11,000 €**



wage per year (apprentice, 4th year): **16,000 €**



wage per year (partsman): **32,500 €**



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CLIMMAR Branch Report: **Warranty & Manufacturer conditions** (1st of July 2019)

<i>fictional example</i>		
Working period calculation	<i>reference periods / actual periods</i>	Table of reference periods
Compensation	<i>wages / hour</i>	€ 69,- / (100% external rate)
	<i>Inclusive diagnostic / setup period</i>	Yes
	<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:</i>	Yes
	<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



Example: **John Deere**

		A	B	CH	CZ	F			L	PL	UK
Compensation	Wages / hour	71,50 (exkl. VAT)	€47,-	79,60	€ 30,-	61,37 to 74,48	75,23 €	amount €/h charged by dealer to customer during previous year (calculation updated every year)	60,-	Different for dealers	80
	% of own tariff	ja	-	100%	75 to 105	100% normal hours tarif	100%	100%	95%	100% external tariff	100%
	Inclusive diagnostic / setup period	5 % nur Teile	Yes, partly	Table of reference periods	yes	yes	yes	YES, unless the time asked for diagnostic is conform to average time asked of all network or what factory determines as « normal » amount	yes	yes	Yes
	Components	100%	Price list less dealer discount (stock order conditions) + 10% for dealer benefit	Price list less dealer discount	purchase price + on-shelf cost	dealer net price + 2% list price at "PowrGard" alt.: dealerprice + 20%	net. + 2%	Buying price for parts + 20% margin (those 20% margin are supposed to cover cost of ordering parts in urgent delivery if you don't have it in inventory in your store. This urgent delivery cost from 19% to 24% of parts price. If you have the parts in store then it's 20% margin)	price list less dealer discount	Net price x shelf cost	Retail less dealer discount
	Outside services		100%	Partly	100%	100%	100%	100%	100%	100%	100%
	Transport	eigenes EDI	no	No	no	is with 2% implemented	no	NO	no	No	none

Warranty Conditions available – from which countries for which brands, 1st of Juli 2019

		A	B	CH	CZ	D	DK	F	GB	H	I	L	LV	NL	PL	S	SK	sum
warranty-conditions in details are available (in English) for these brands	JD	X	X	X	X	X	X	X	X			X			X			10
	NH	X	X	X		X	X	X	X			X			X		X	10
	Claas	X	X	X	X	X	X	X				X						8
	MF	X	X	X		X	X	X	X			X						8
	SDF	X	X	X		X	X	X				X					X	8
	Case	X	X	X		X	X	X				X						7
	Valtra	X		X		X	X		X			X						6
	Fendt	X	X	X			X	X	X			X					X	8
	Kubota	X	X	X		X		X	X								X	7

red – from 2018

Source: CLIMMAR

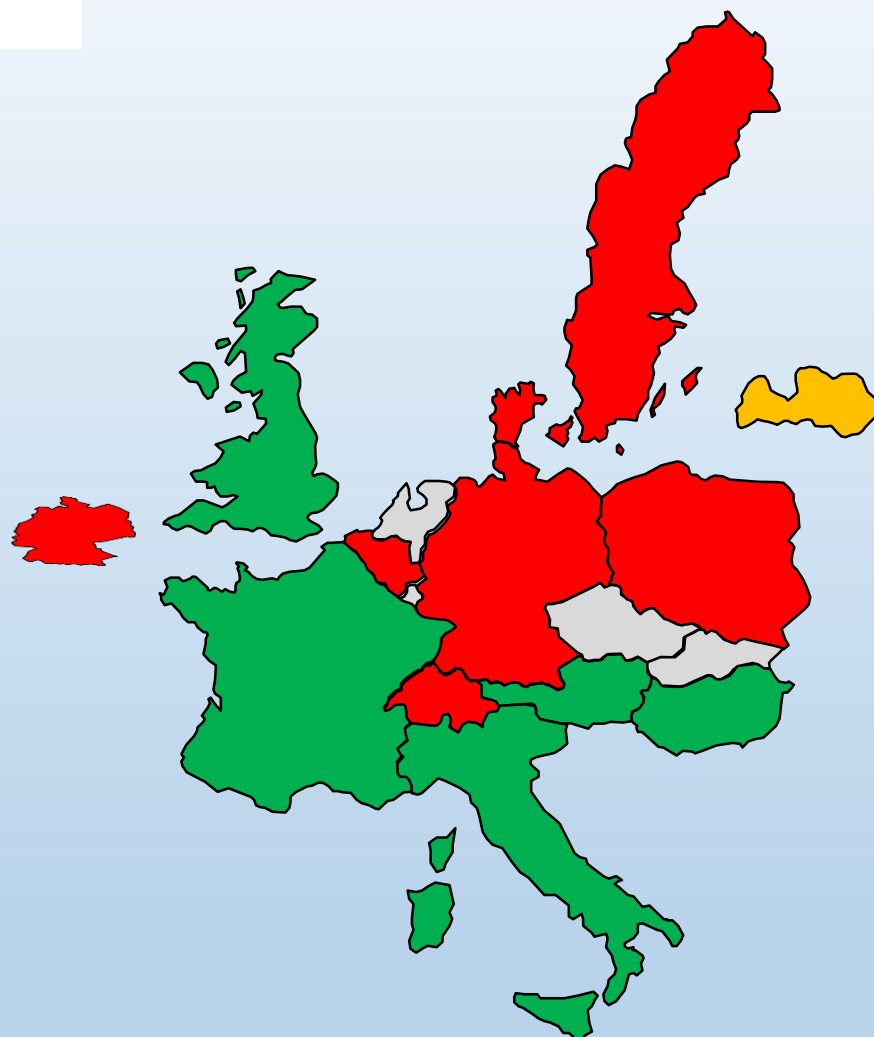
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I. Comparison to same period last year: January - June 2019

		- (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 2019
compared with the same
period 2018:

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



Turnover new equipment

development of turnover in the first half of 2019 compared with the same period 2018:

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



Turnover workshop

development of turnover in
the first half of 2019
compared with the same
period 2018:

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

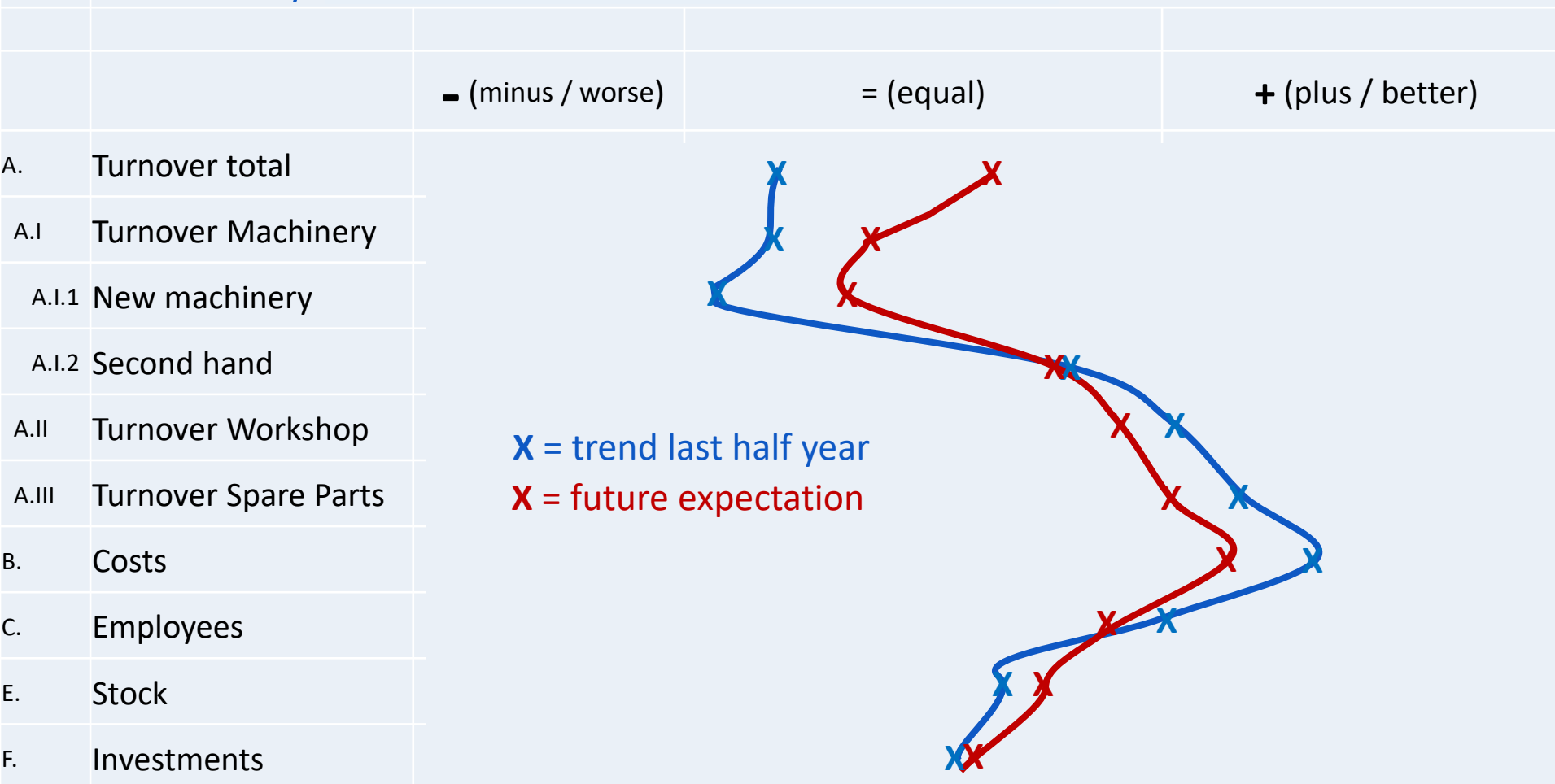


Turnover spareparts

development of turnover in
the first half of 2019
compared with the same
period 2018:

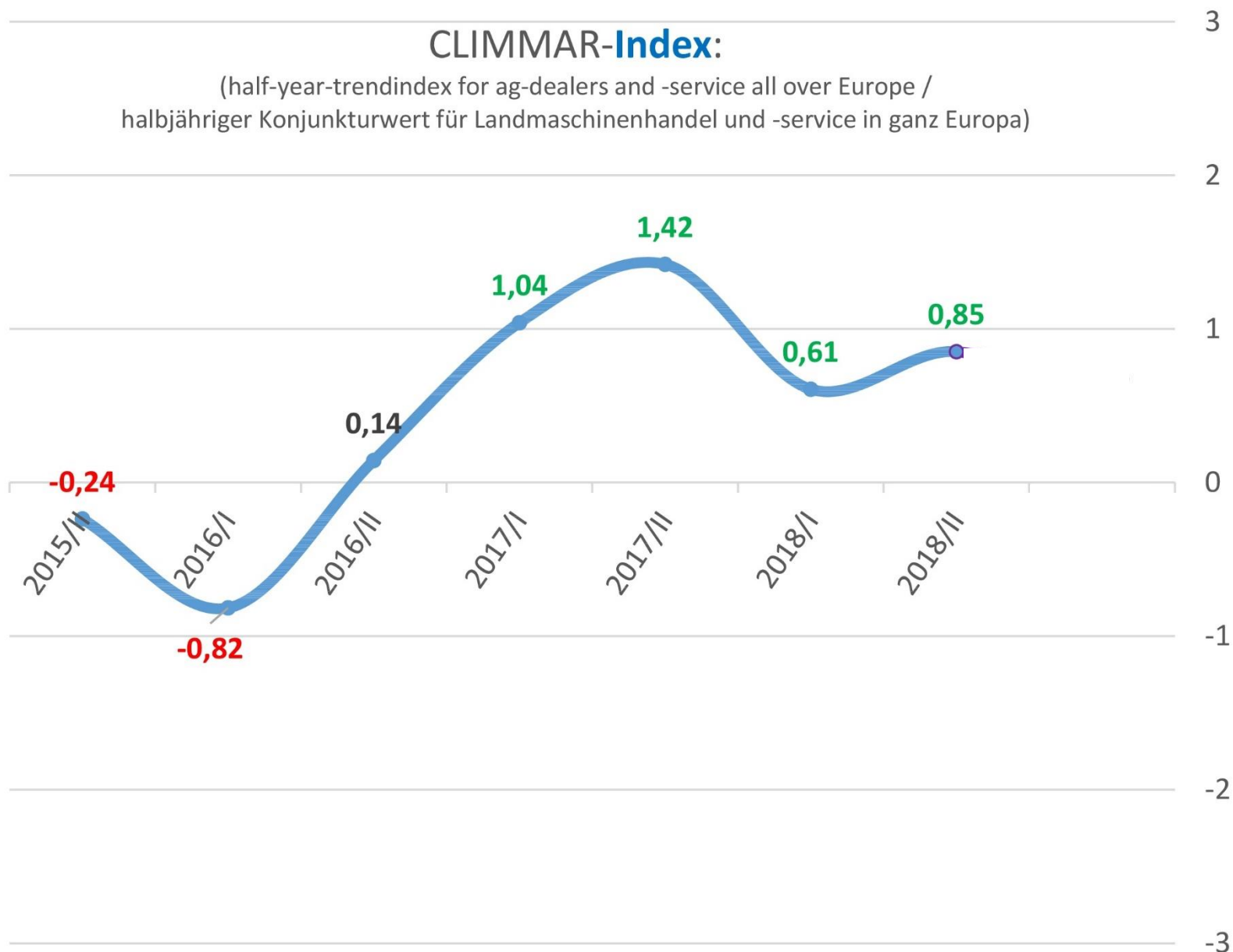
-  less / worse / decrease
-  equal
-  more / growing / increase
-  no answer

I. Trend 2019/I



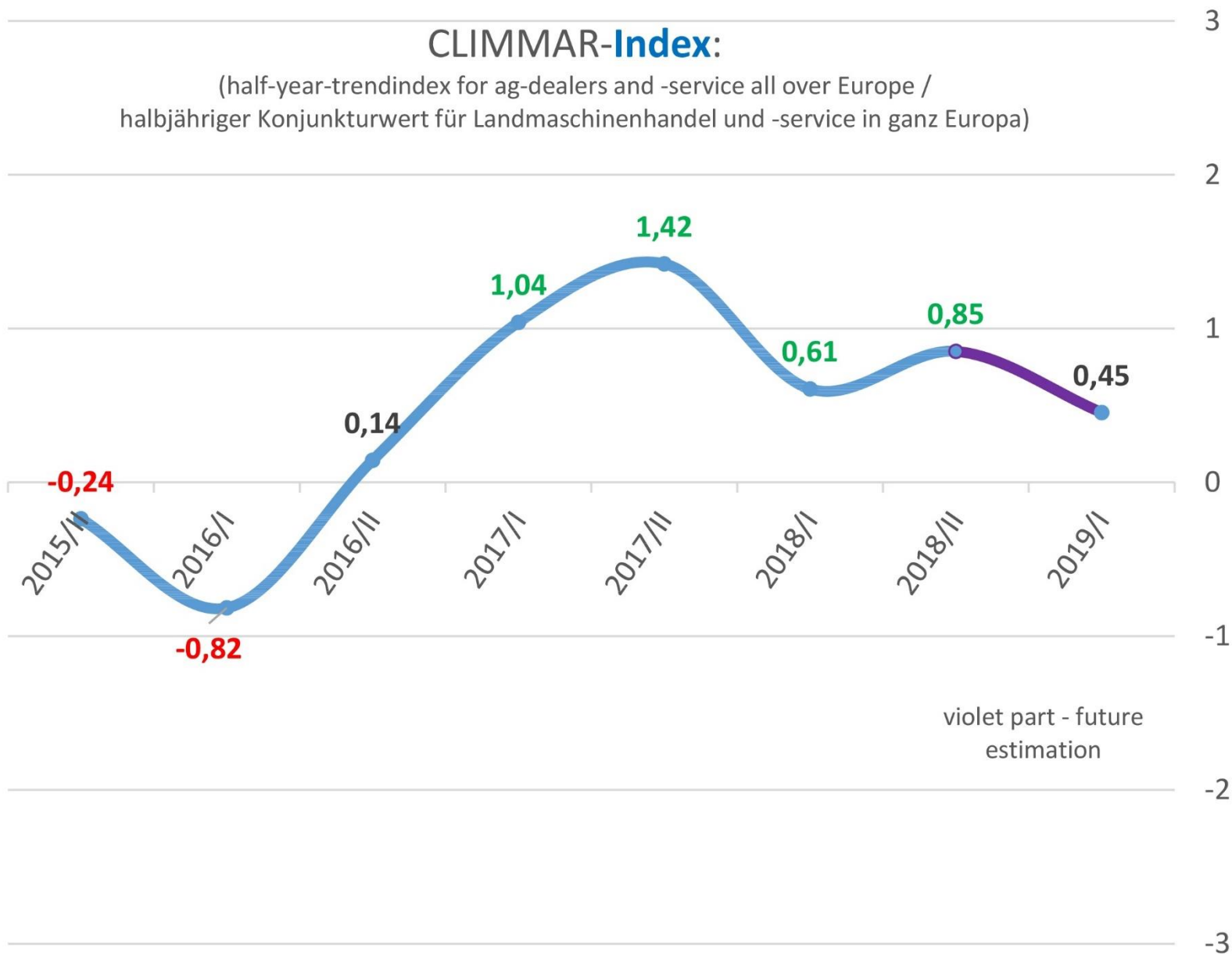
CLIMMAR-Index:

(half-year-trendindex for ag-dealers and -service all over Europe /
halbjähriger Konjunkturwert für Landmaschinenhandel und -service in ganz Europa)



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Surveys 2020: Wishing us a tremendous participation

The collage features several documents from the agricultural machinery sector:

- CLIMMAR Branch Report: Companies average data**: A form for reporting company statistics, including turnover, equipment, and personnel.
- CLIMMAR Branch Report: Markets and Structures**: A form detailing market segments, company units, and employee statistics.
- CLIMMAR Branch Report: Trends**: A form for reporting trends in turnover, machinery, and costs.
- CLIMMAR Branch Report: Manufacturers' current warranty conditions**: A form detailing warranty terms and conditions for various machinery types.
- CLIMMAR Branch Report: Company Statistics**: A form for reporting company-specific data, including average mechanic, workshop-master, parts-man, trainee, and weekly working hours.

The documents are presented in a tilted, overlapping manner, suggesting a collection of forms used in the industry survey.

in May/June 2020



New ideas for projectteam 2:

- Tractor-statstics in details:
brands, power-classes, regions
- Analysis of A-/B-dealers per brand:
turnover, staff, sales
- Comparison of driving-license systems in
Europe
- Warranty-conditions more intensive:
other brands, other branch-groups



Thank you for your audience

Projectteam 2: Data and Surveys

