



# WELCOME TO CLIMMAR!

## THE INTERNATIONAL DEALERSHIP NETWORK OF 15 NATIONAL ASSOCIATIONS AND THEIR MEMBER COMPANIES IN THE AGRICULTURAL MACHINERY AND EQUIPEMENT SECTOR



15 Members and counting!  
16.849 Dealers and counting!  
139.094 Dealers employees  
3.544.311 Farmers  
1.942.224.700,5 ha. in total



# CLIMMAR Press Conference 2015

**Introduction to the highlights of  
CLIMMAR-activities in 2015**



# Since 1 year a new CLIMMAR Board Team

President : Erik Hogervorst  
Vice President : Ulf Kopplin  
Vice President : Joost Mercx  
General Secretary : Jelle Bartlema



JOOST



ERIK



JELLE



ULF



# Provisional strategy of CLIMMAR:

Move into the direction of Dealer-interests!

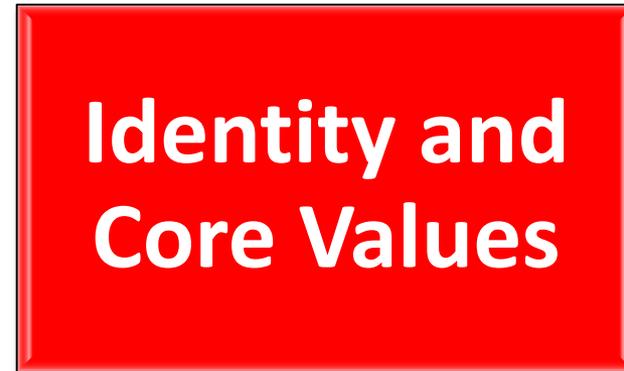
- Focus on topics, aligned to the work of national members
- Concentrate workforce, attention and money on few priority-activities/projects
- Choose topics that will effect all four quadrants
- Involve the member organisations in the work of CLIMMAR



# The four-stroke engine of CLIMMAR:

## The Topics

Creating conditions



Collective

Individual

Impact and influence



Association



Output oriented



# The priorities

**Lobby**

**Identity and  
core values**

**3a. Cooperation CEMA**

**3b. Cooperation SPICE**

**1a. Work on common CLIMMAR policy  
plan**

**1b. Grow the base of members and  
funding**

**4a. Education and Training**

**4b. Dealer Satisfaction Index**

**2. Exchange Marketdata and Company-  
benchmark at quarterly base**

**Development Branch**

CLIMMAR pressconference 9th of October

2015

**Services**



# How did we do in 2015?

- 4 Topics divided in 4 Workinggroups
- Each topic is directed by a team of 5:
  - 1 member of the CLIMMAR Board,
  - 1 secretary of national organization in the lead
  - 3 secretary's of different national organizations
- Every team formulated the goals and milestones
- The first results were presented on the last Congress in Stockholm, Sweden



# Result Workinggroup 1:

Mid-Term Strategy Document with 4 strategic goals

1. Respected lobby organisation: take action on the impact and image of CLIMMAR
2. Improve the image and awareness of mechanics in the European Branch
3. Strengthen the position and profitability of European agromachinery-dealers
  - Better tools to measure performance of dealers in member-countries
4. At least five new members of CLIMMAR



# Results Working Group 2: Services



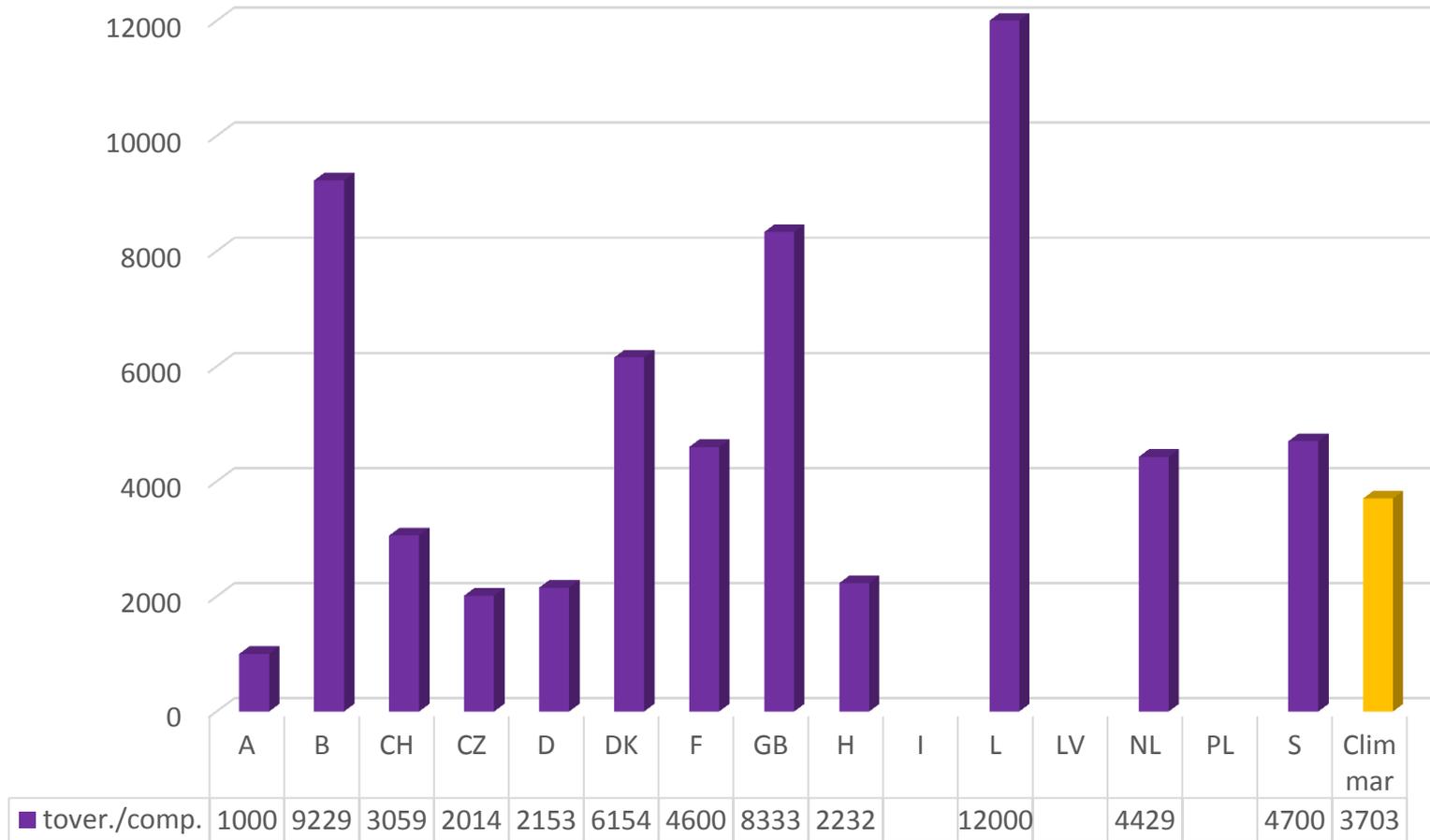
## Several Branche Reports:

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



# National Markets and Structures:

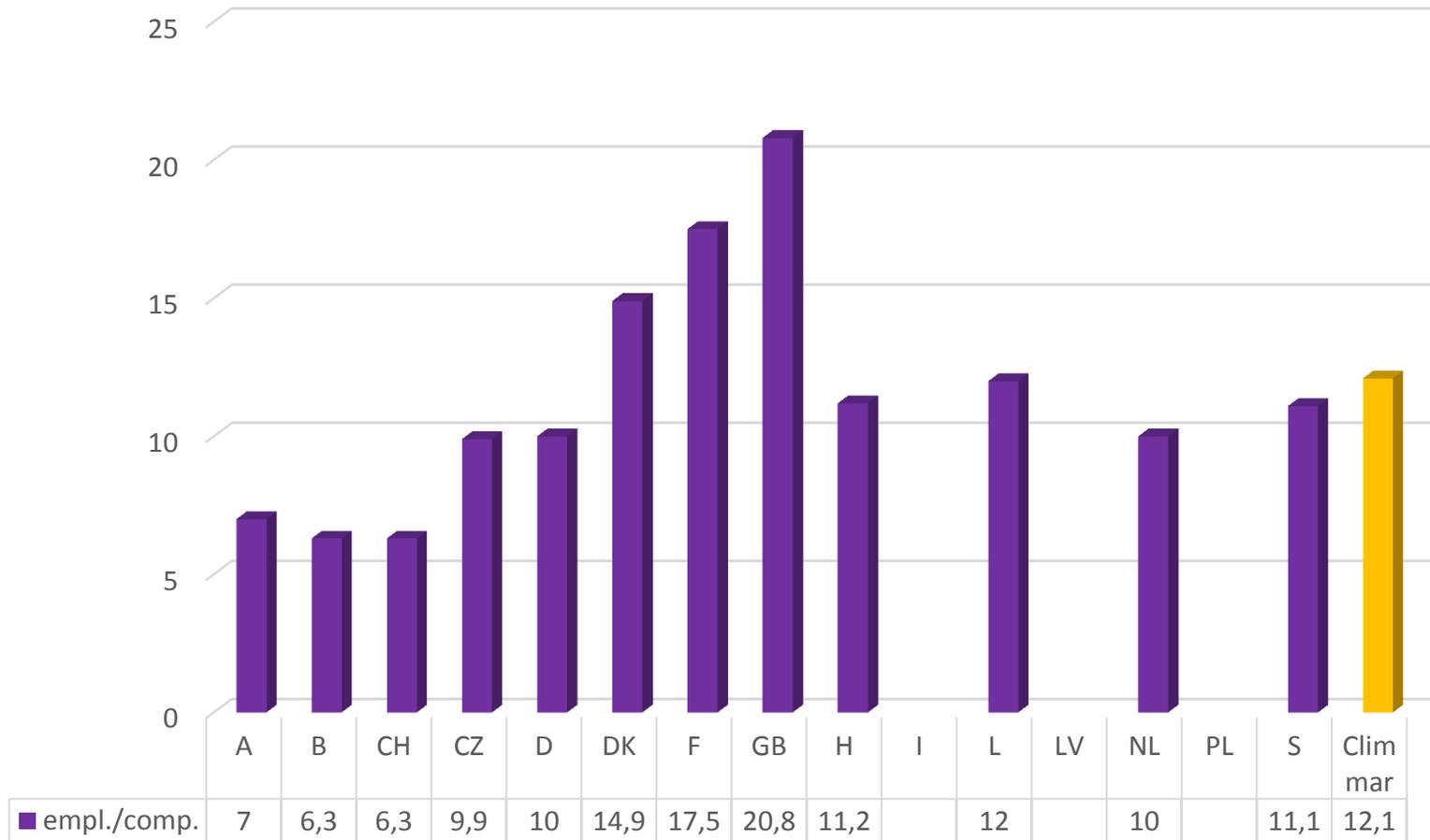
## relations: Turnover per Company





## National Markets and Structures:

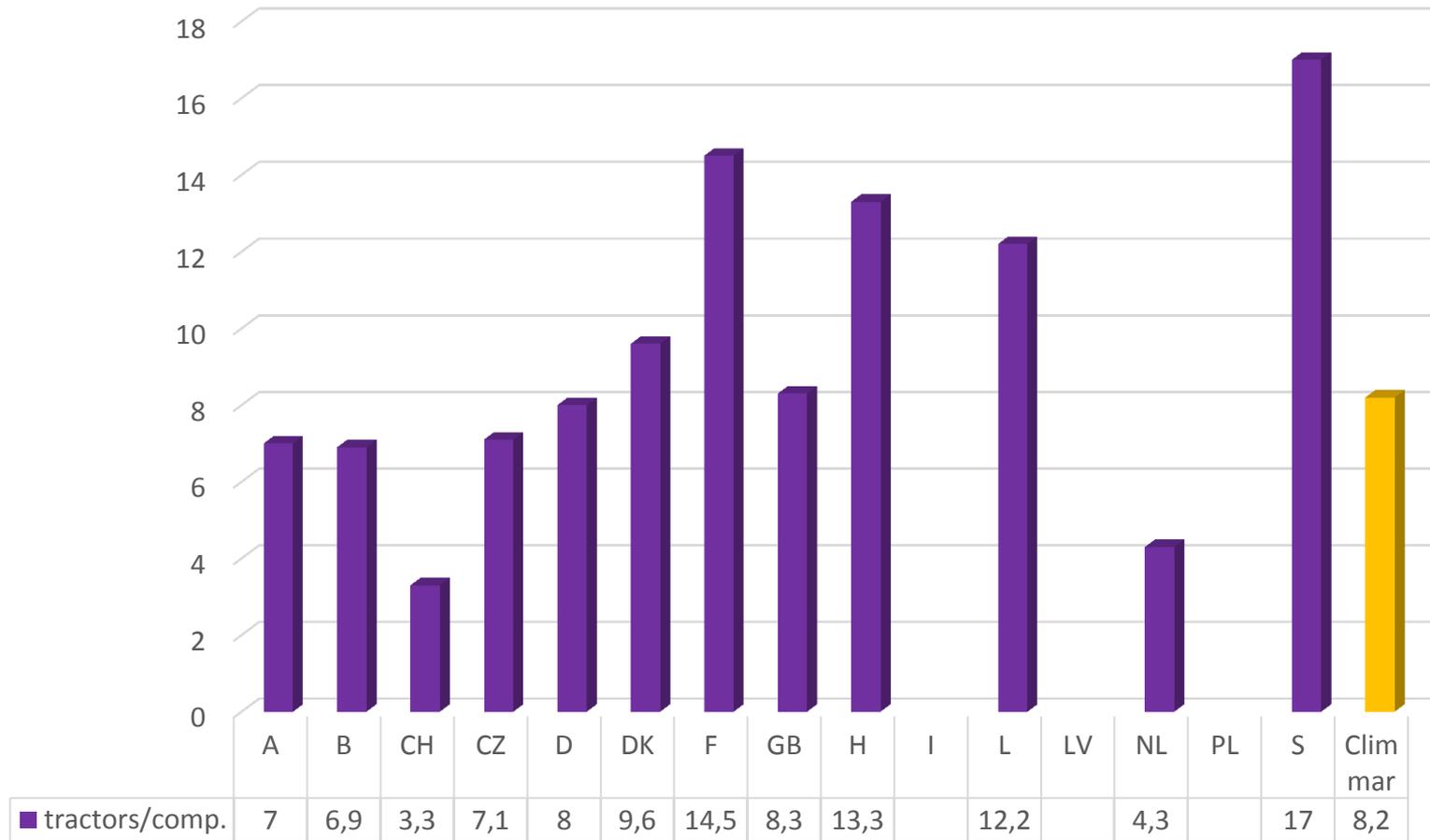
relations: Employees per Company





# National Markets and Structures:

## relations: Tractors per Company





## 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



## 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



## Results Working Group 3: Lobby



- Growing new contacts & members
- SPICE sprayer testing
- RMI (repair & maintenance information)



## Growing new contacts and members

- SLOVAKIA                      AGRION
- RUSSIA                         AXCOD
- NORWAY                        MGF
- IRELAND                       FTMTA
- PORTUGAL                      ACAP
- ICELAND                        VELFANG
- USA                              NAEDA
- CHINA                          CAMDA



## SPISE – CLIMMAR

- SPISE = S(tandardized)P(rocedures for the) I(nspections of) S(prayers in)E(urope)
- SPISE wants to cooperate with CLIMMAR in order to come to periodical inspections on sprayer machines at a qualitative and EU wide uniform level
- Dealers are important in inspection scheme:
  - In most EU countries the dealers can be the official inspection workshop
  - In all countries dealers must do the repairs/upgrading sprayers



## EU-directive on Repair and Maintenance Information (RMI)

### **Basics :**

EU-directive 167/2013 has under chapter XV (which was co-created based on the car-directive, by German Car-dealers Association ZDK) the necessity, that a manufacturer of machines of agricultural and forestry equipment (lof), has to give authorized dealers, repairers and independent service providers, via the internet ... without discriminating access to repairers and service-information, in an easily accessible way; probably online, but not for free.



## **CLIMMAR project - The idea**

Aim of the CLIMMAR feasibility analysis is to install several applications of the various manufacturers on one personal computer.

## **CLIMMAR project - The result**

Development of a diagnostic and programming structure using only one vehicle communication interface for all ECUs in the vehicle.





# CLIMMAR Decision on RMI

- CLIMMAR adopts an active role into the lobby by participating in the relevant (European) consultative bodies;
- For the purpose of this active role the activation of external expertise is necessary;
- Seeking cooperation with CEMA where possible;
- Setting a certain expertise level (defined by CLIMMAR) to freely make use of RMI;
- The appointment of a CLIMMAR project group consisting of a few people who can act as ordering party that also can control and check the mandate given by the general assembly of CLIMMAR



## Results of workinggroup 4: Branch Development



### **Education and Training > Promoting the job**

- CLIMMAR participates in the Euroskills assemblies and is also a partner member of Euroskills organisation
- A great way to promote our jobs

### **CLIMMAR Action > raising the participation of members in EuroSkills**

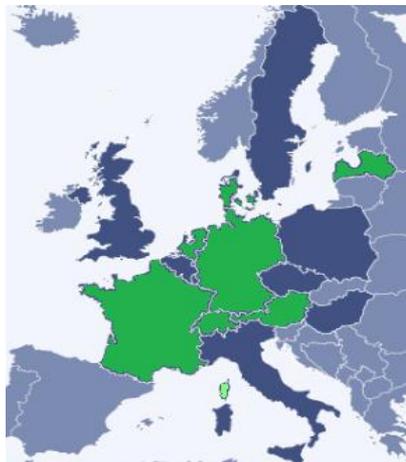
A survey has been sent out to Climmar members (on 21 August 2015) with the aim of:

- learning about the organisation of national contests in the countries participating, in order to help the other countries to organise this national contest;
- understanding what prevents certain countries from taking part in Euroskills

# Current situation:

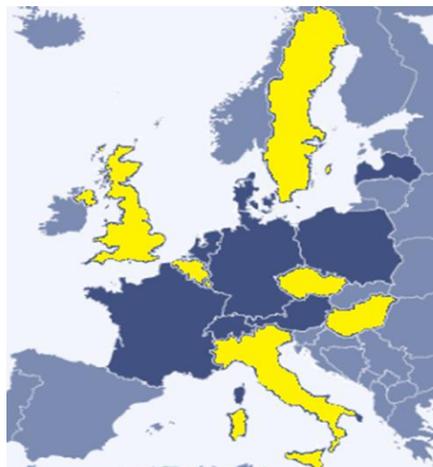
## Countries participating in Euroskills

- Austria (AUT)
- Denmark (DNK)
- France (FRA)
- Germany (DEU)
- Latvia (LVA)
- Switzerland (CHE)
- The Netherlands (NLD)



## Country not participating in the next edition(s) of Euroskills

- Belgium (BEL)
- Great Britain (GBR)
- Hungary (HUN)
- Italy (ITA)
- Luxembourg (LUX)
- Sweden (SWE)
- The Czech Republic (CZE)

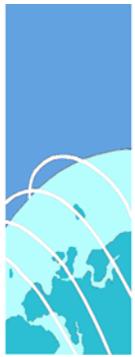


## Country intending to participate in Euroskills in the future:

- Poland (POL)



The next Euroskills competitions will be held in Sweden in Gothenburg from November 30<sup>th</sup> to December 3<sup>rd</sup>, 2016.



A Great way of Promoting our Jobs!



[www.euroskills2016.com](http://www.euroskills2016.com)



# European Dealers Satisfaction Index

Results 2015





# Number of answers by countries

	2011	2012	2013	2014	2015
 • BELGIUM	• -	• -	• -	• 36	• 40
 • DENMARK	• 96	• 76	• 108	• 84	• 92
 • FRANCE	• 288	• 269	• 303	• 332	• 308
 • GERMANY	• 313	• 305	• 244	• 301	• 274
 • ITALY	• 58	• -	• -	• -	• 168
 • POLAND	• 38	• 32	• 30	• 46	• 63
 • THE NETHERLANDS	• 163	• 168	• 174	• 199	• 176
 • SWITZERLAND	• 131	• 100	• 96	• 132	• -
 • UNITED KINGDOM	• -	• 145	• 180	• 122	• 133
	<b>1087</b>	<b>1095</b>	<b>1135</b>	<b>1252</b>	<b>1254</b>

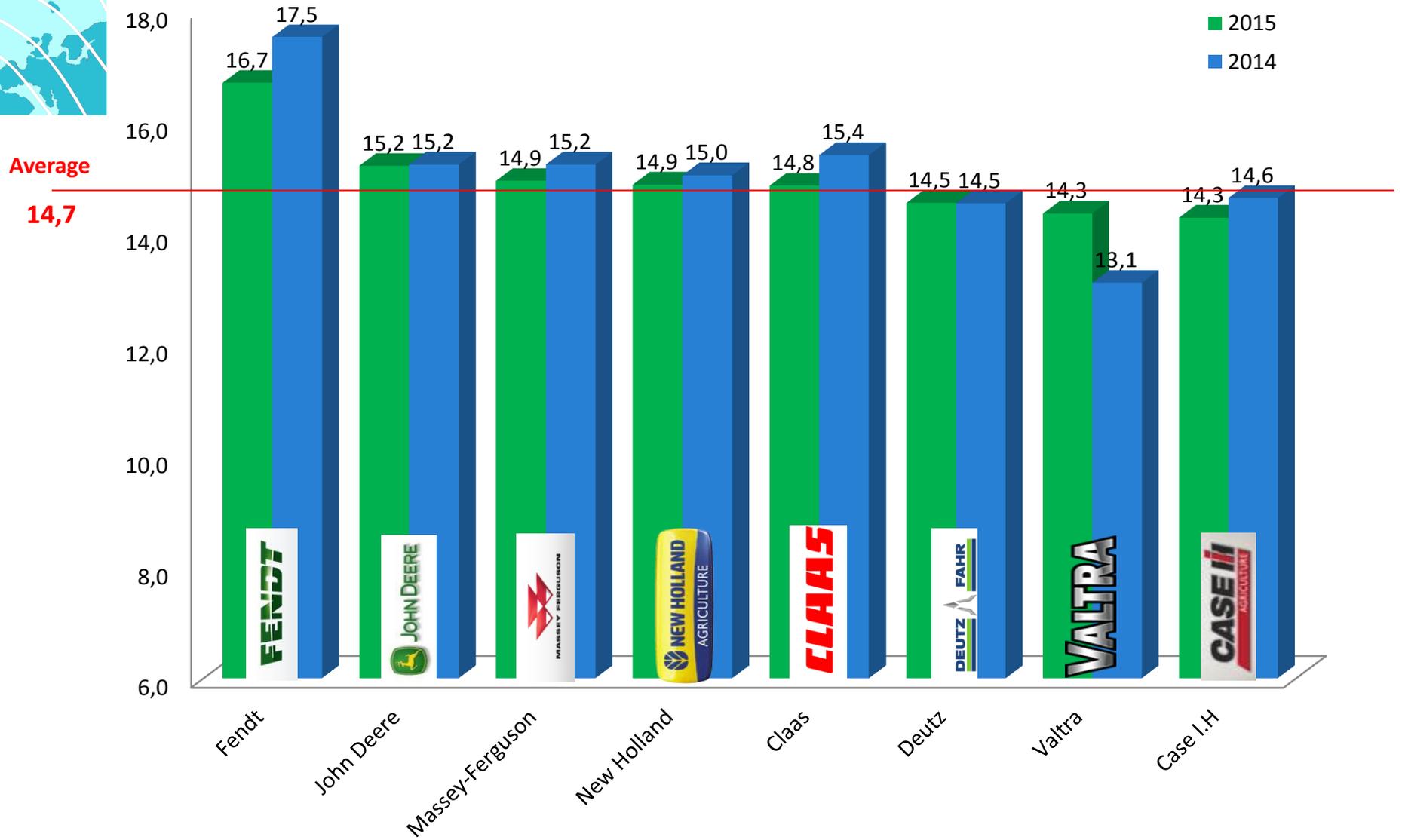


# RESULTS BY MAIN CATEGORY AND WITH EVOLUTION 2014 / 2015:

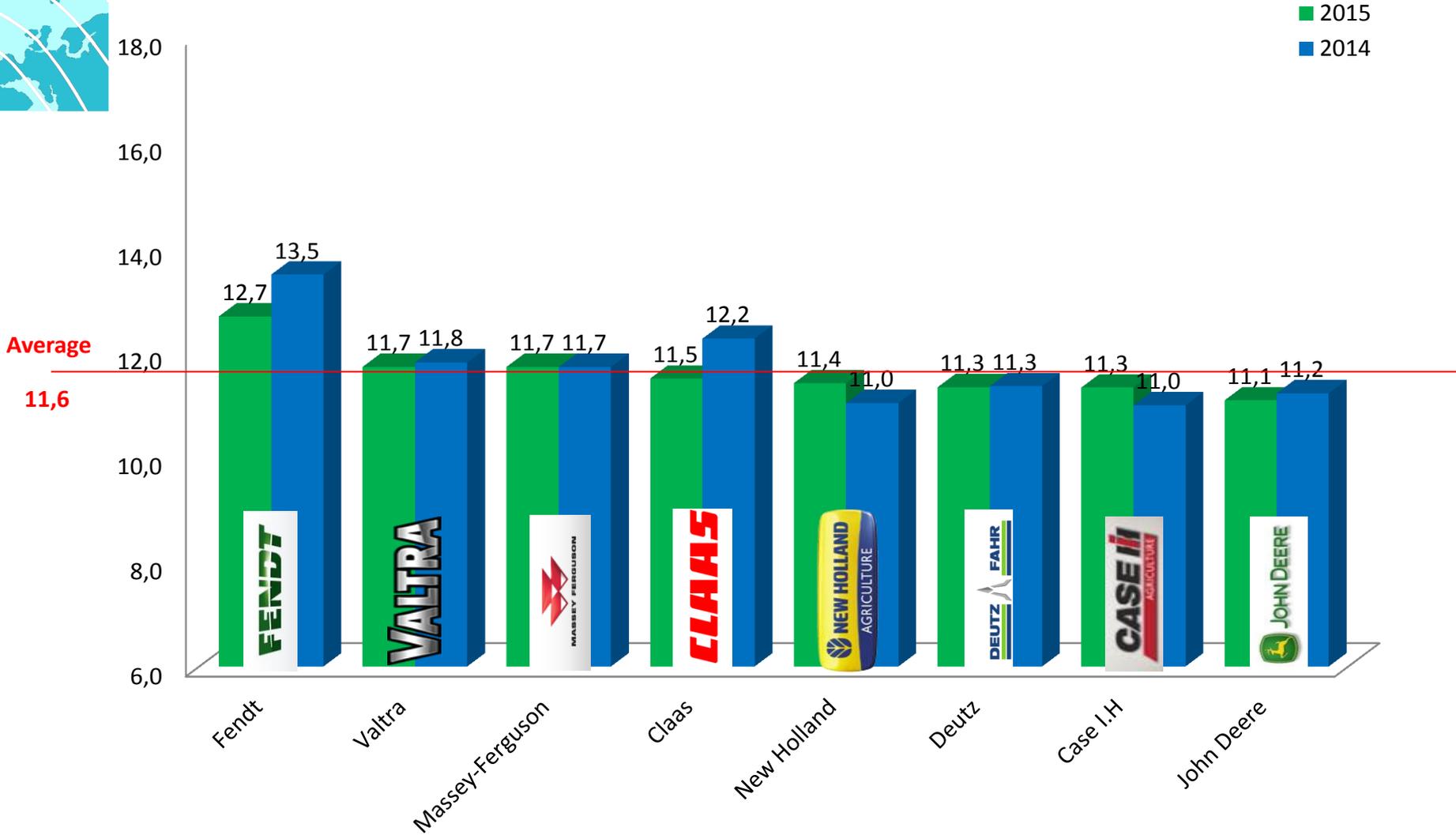
- 1: BRAND IMAGE AND IMPACT
- 2: SALESSUPPORT OF TRACTORS
- 3: SALESSUPPORT OF SPARE PARTS
- 4: AFTERSALES SERVICES AND WARRANTY
- 5: COMPUTER SERVICES
- 6: ADVERTISING AND PRODUCT SUPPORT MATERIAL
- 7: ADMINISTRATION AND TERMS OF PAYMENT
- 8: TRAINING
- 9: THE MANAGEMENT
- 10: MANUFACTURER – DEALER RELATIONS
- 11: PROFITABILITY CONTRIBUTION
- 12: IMPROVEMENTS
- 13: FINANCING
- 14: ANTI-THEFT



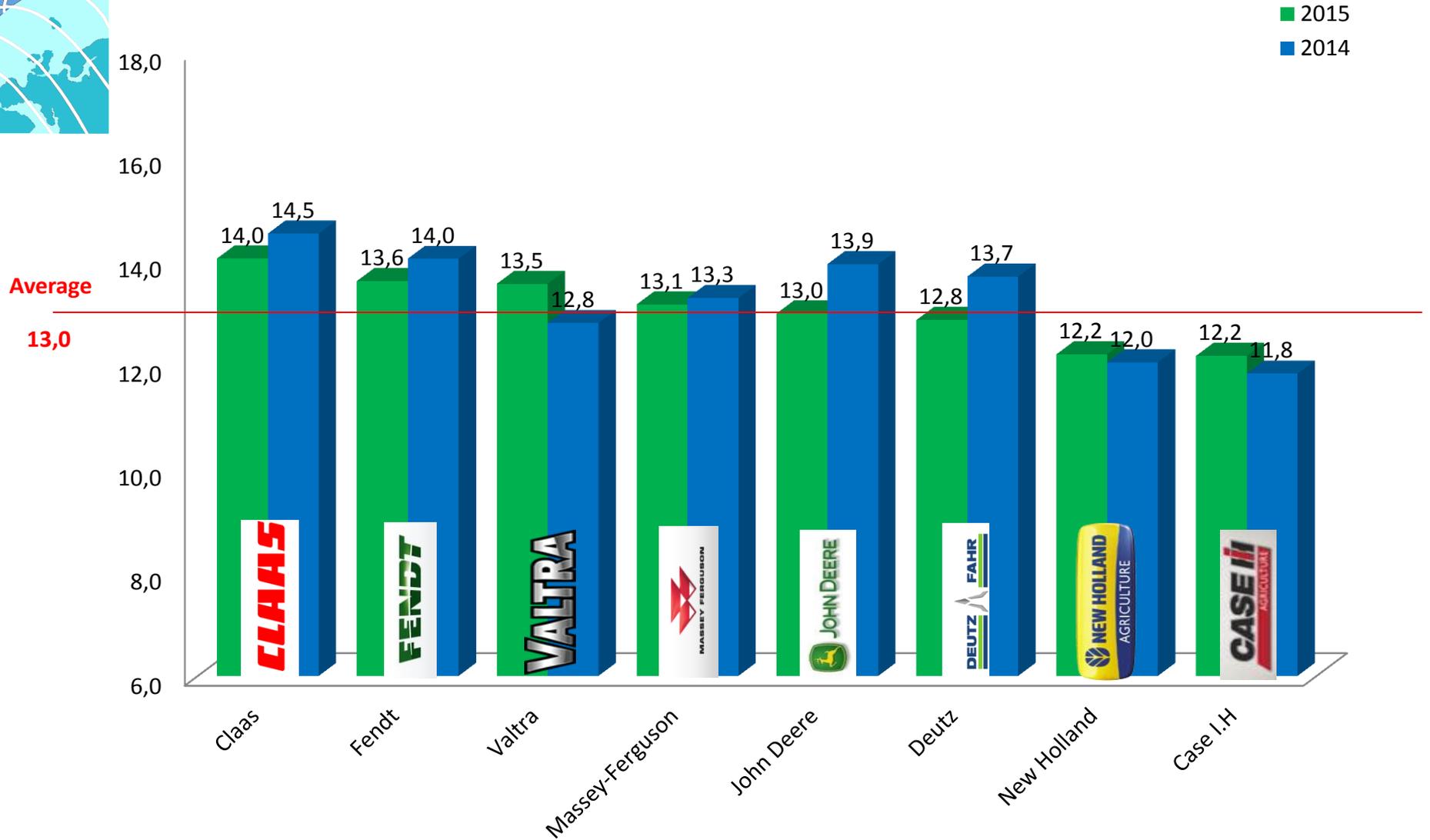
# 1. BRAND IMAGE AND IMPACT- Result 2015/ 2014



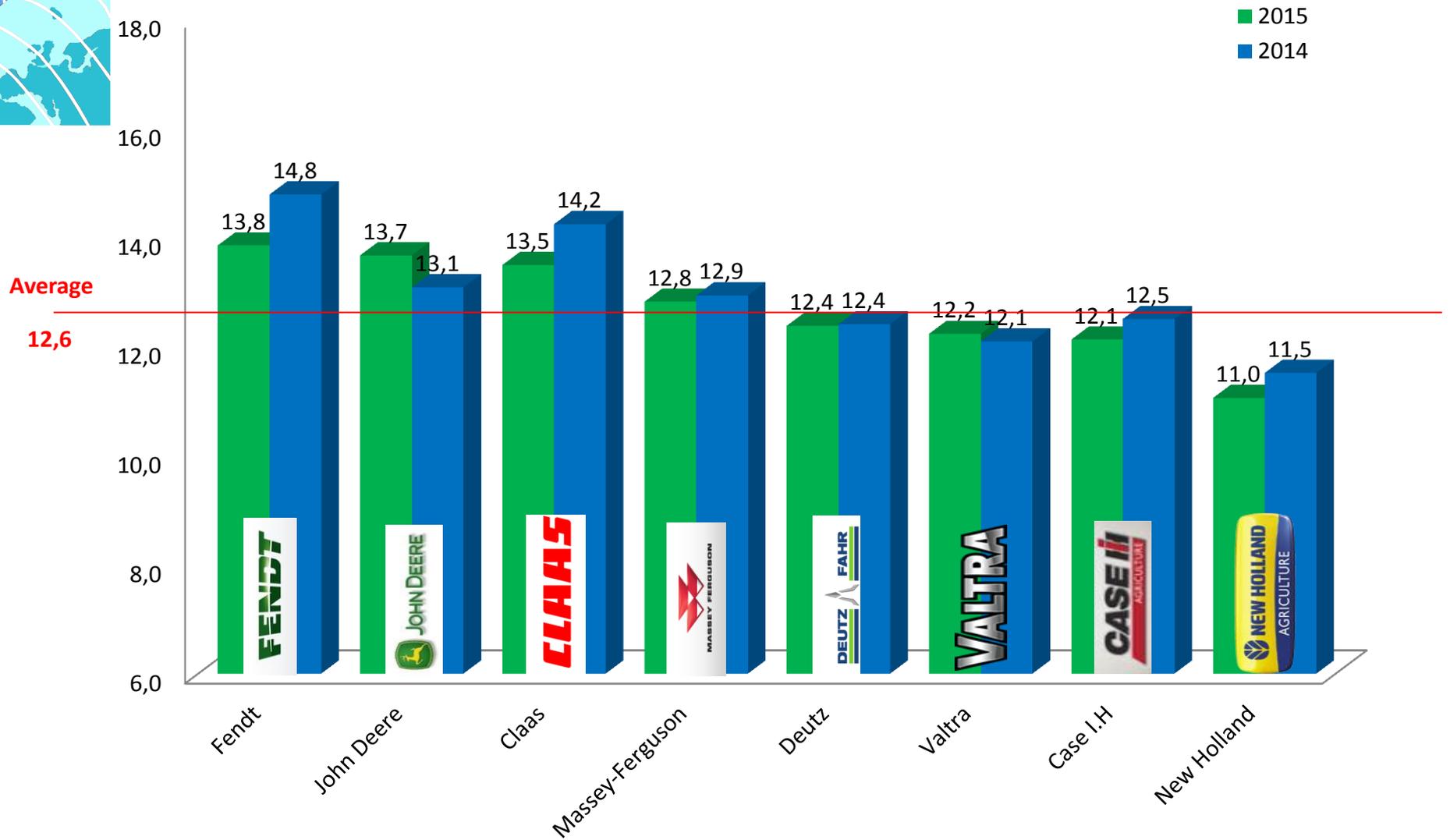
## 2. SALESSUPPORT OF TRACTORS- Result 2015/ 2014



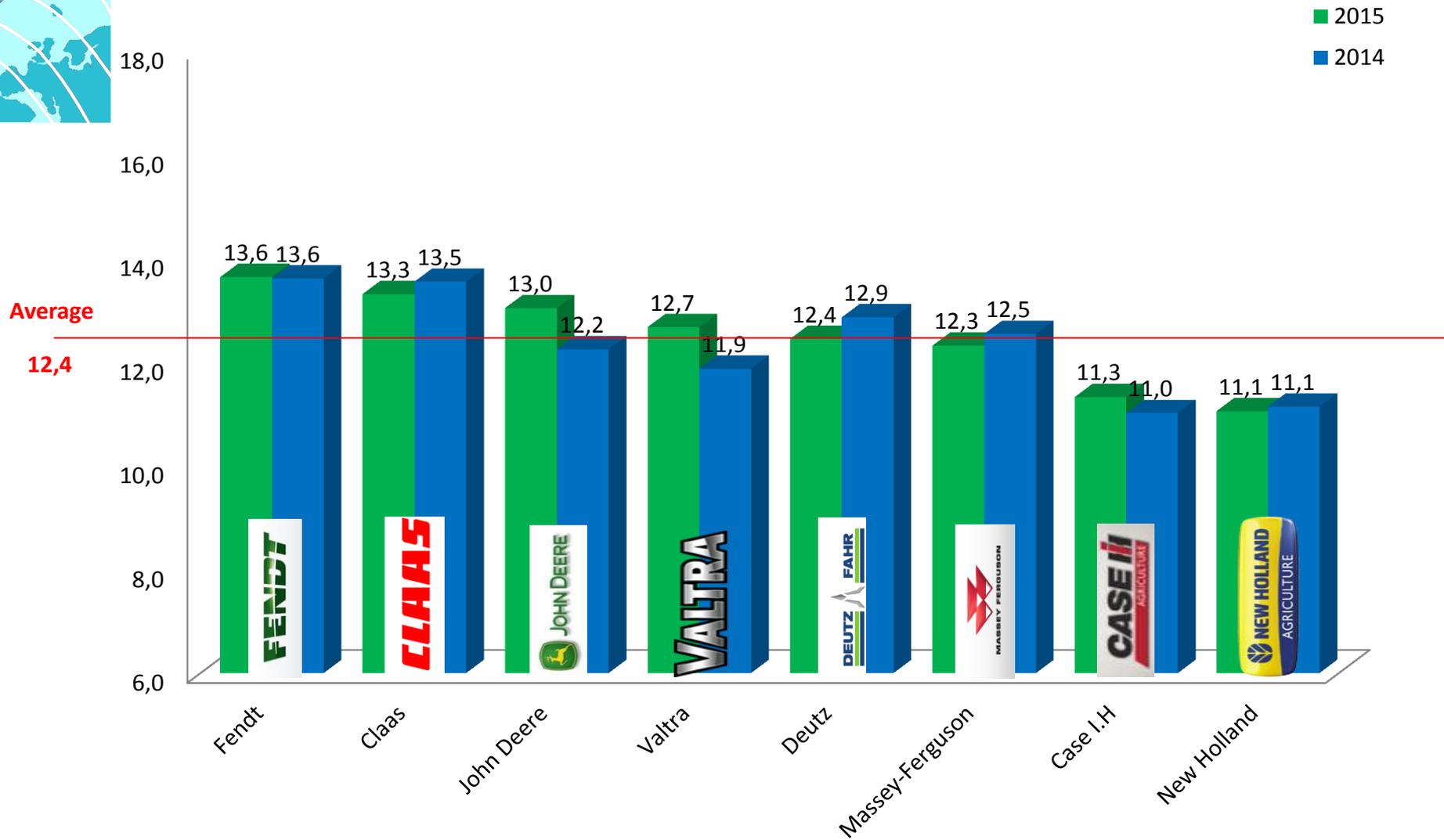
### 3. SALESSUPPORT OF SPARE-PARTS -Result 2015/ 2014



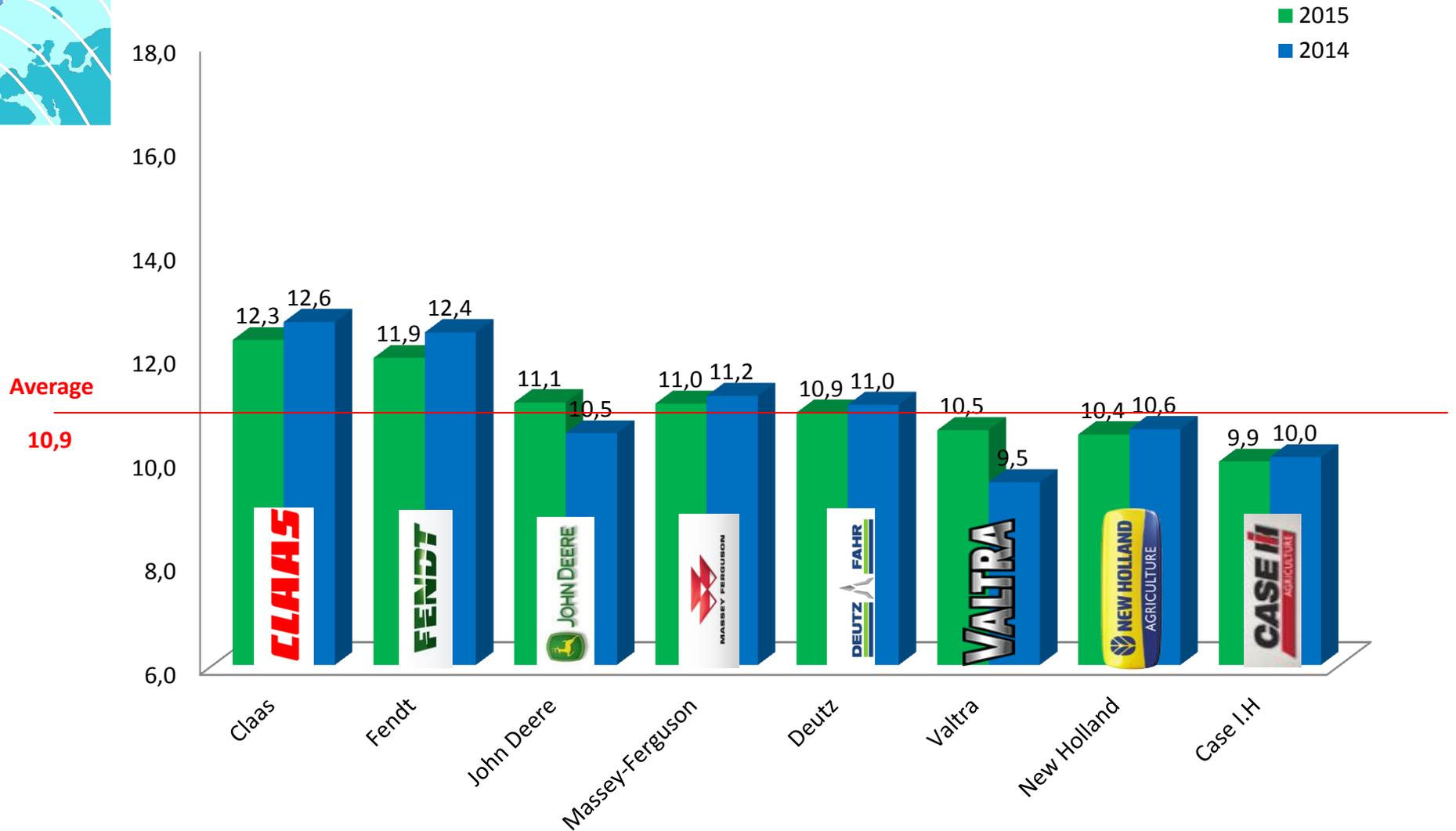
## 4. AFTER-SALES SERVICE AND WARRANTY - Result 2015/ 2014



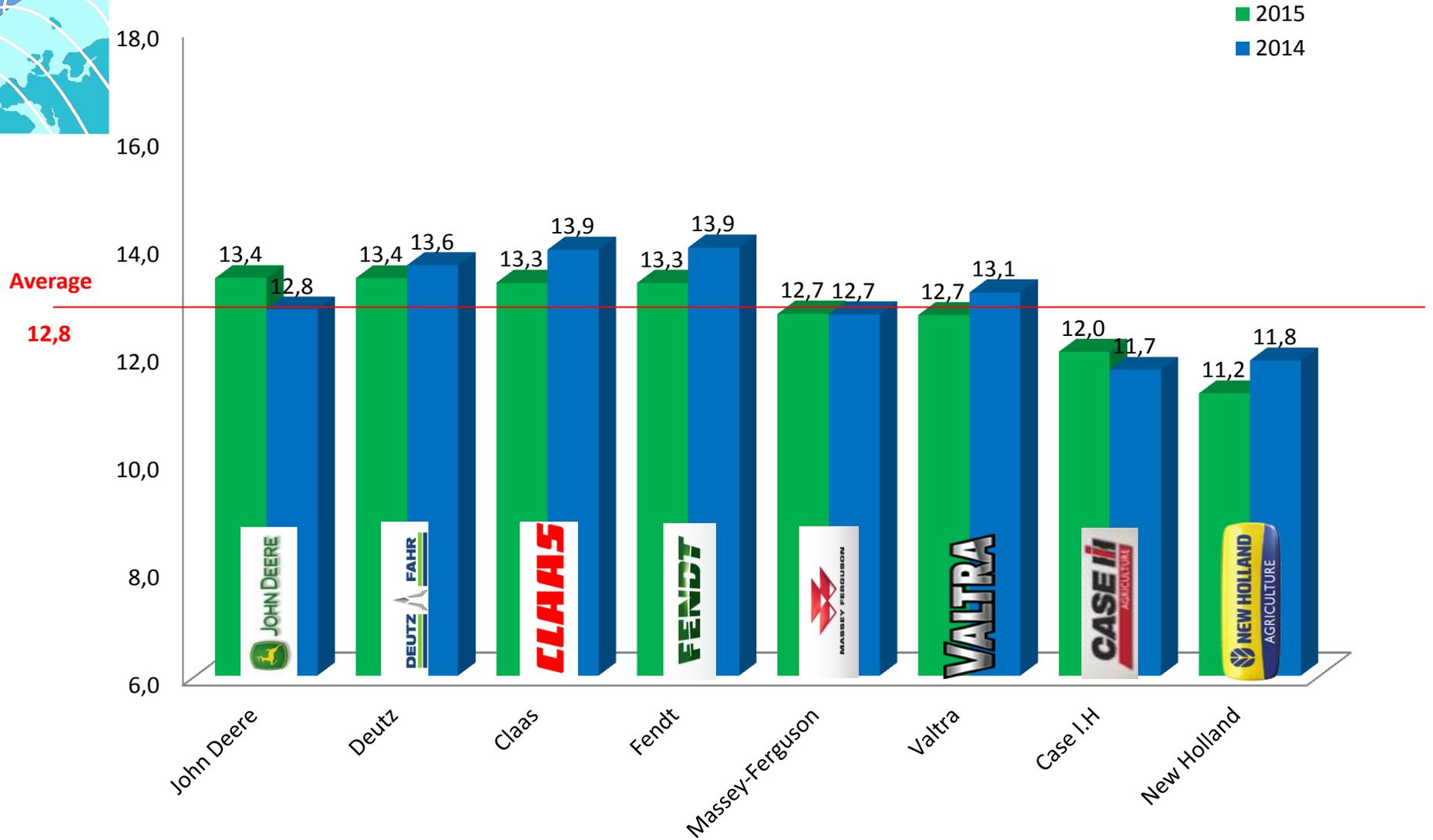
## 5. COMPUTER SERVICES Result 2015/ 2014



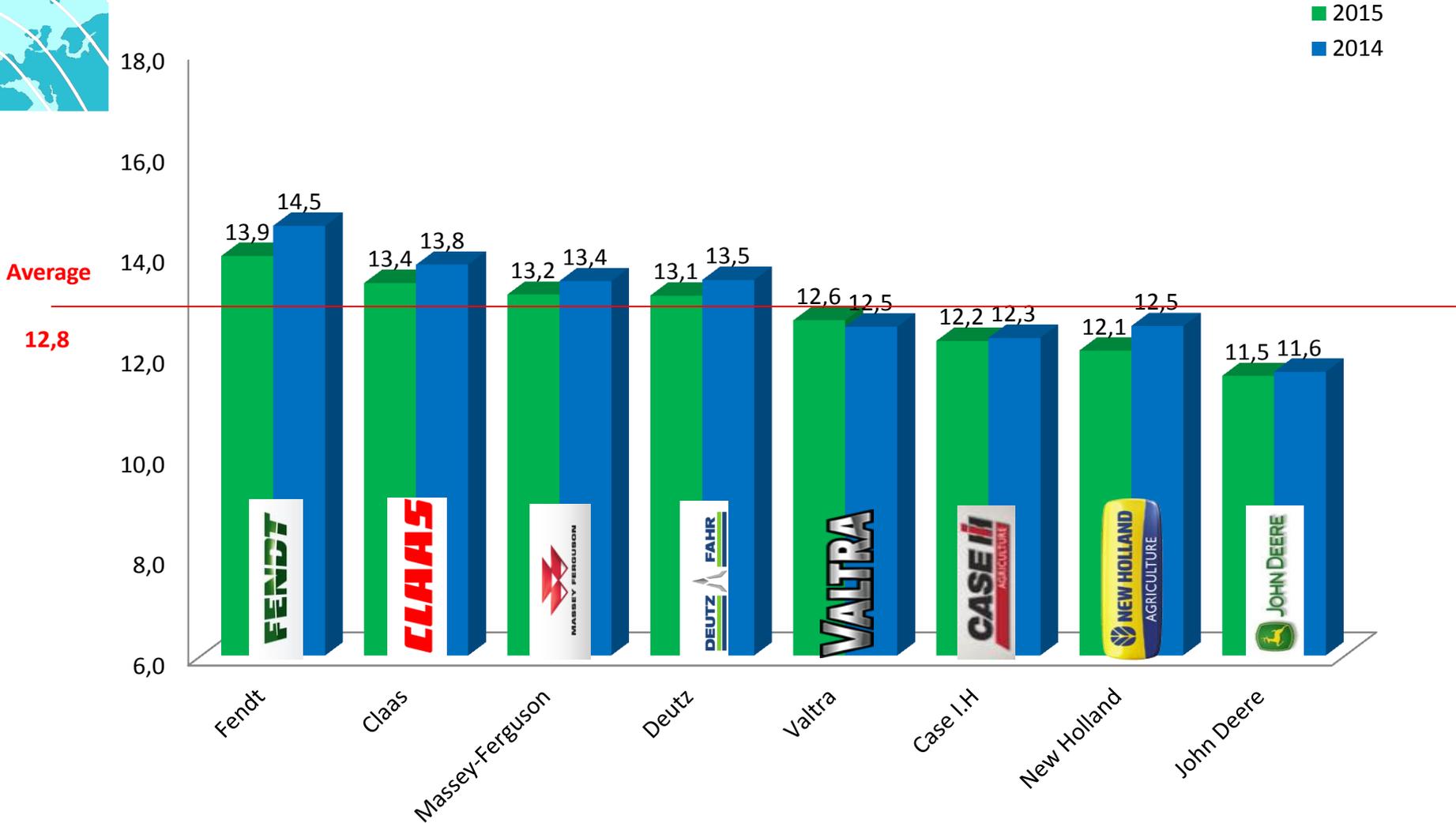
## 6. ADVERTISING AND PRODUCT SUPPORT MATERIAL- Result 2015/ 2014



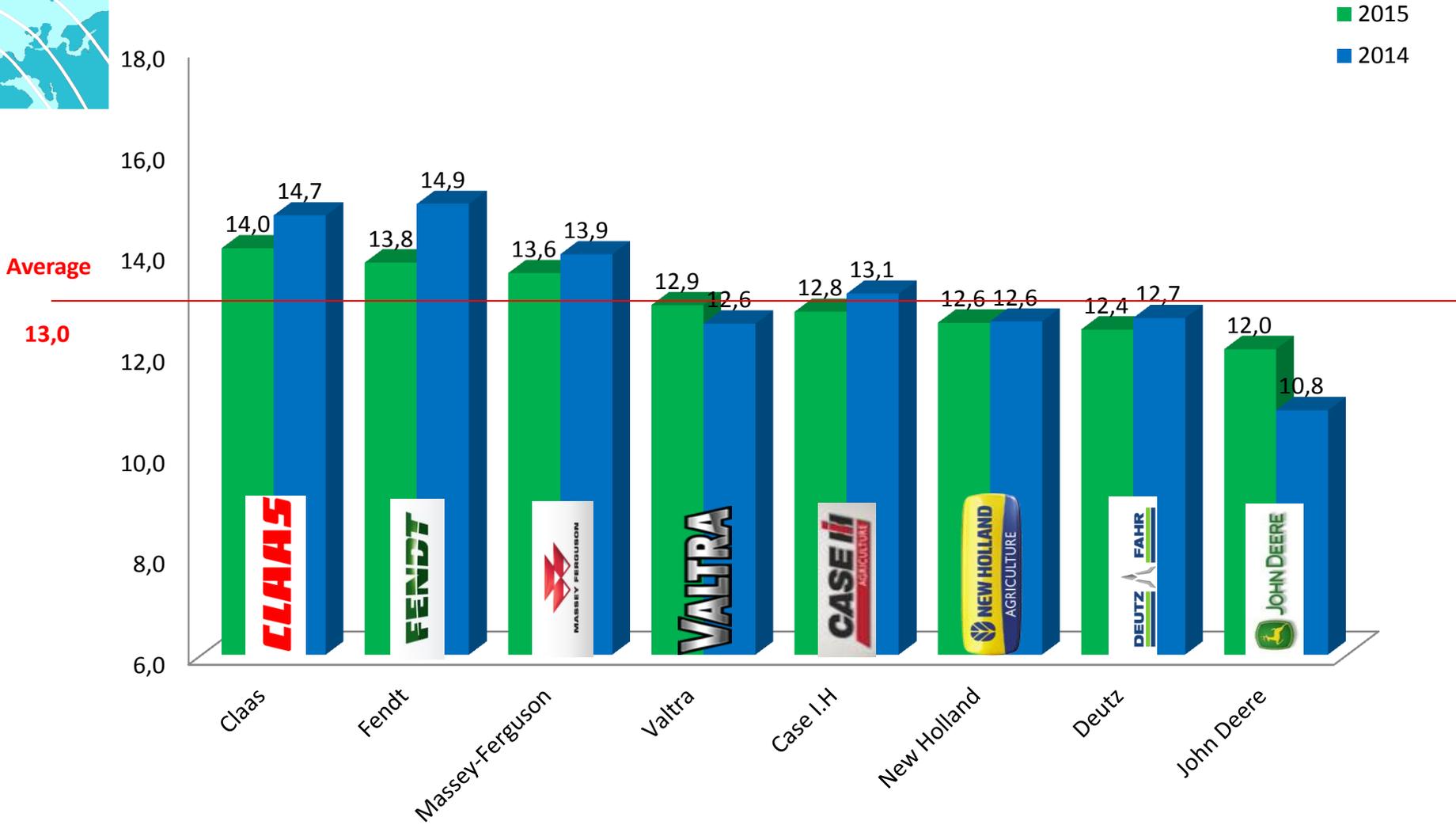
## 7. ADMINISTRATION AND TERMS OF PAYMENT- Result 2015/ 2014



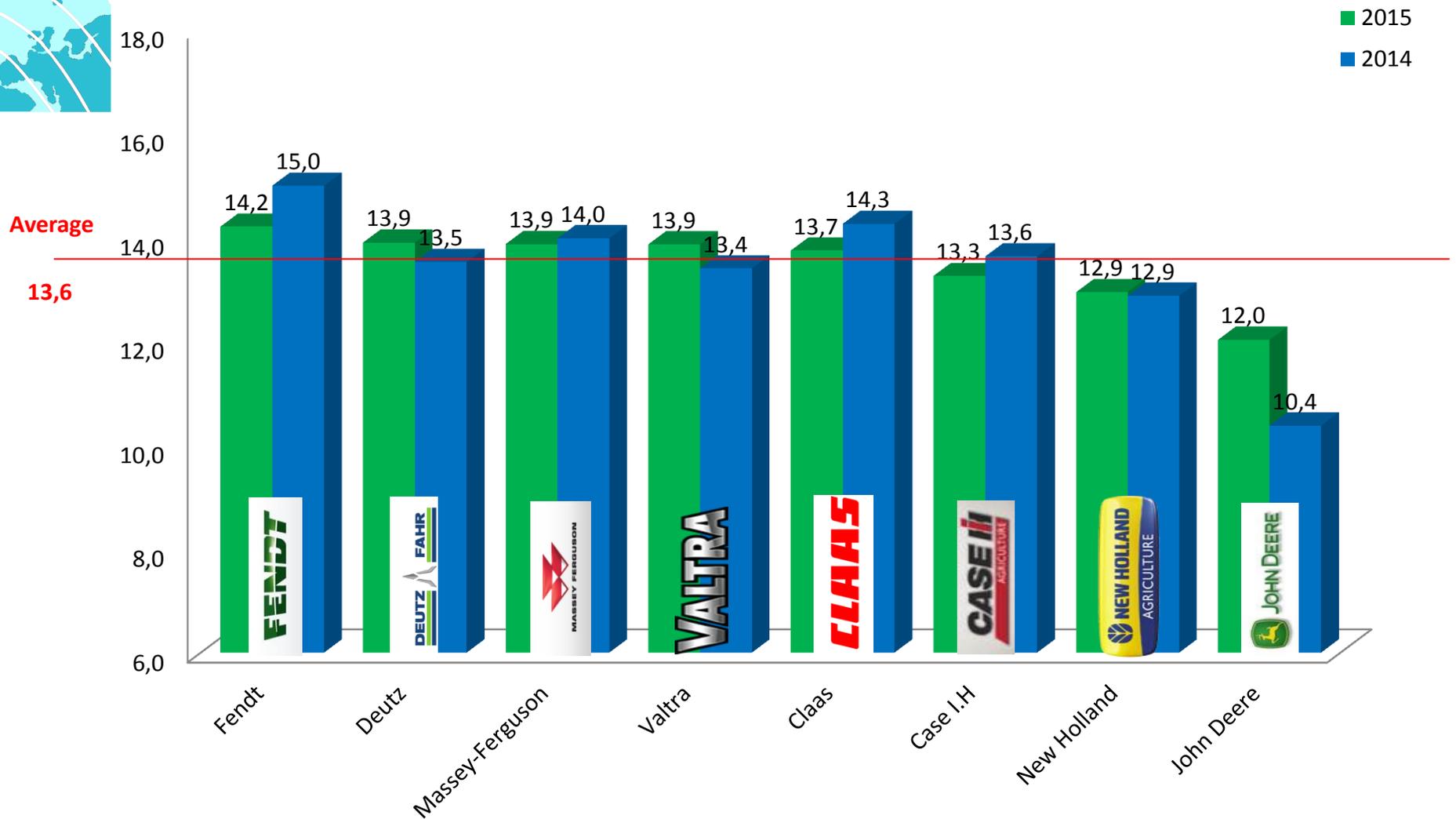
# 8. TRAINING - Result 2015/ 2014



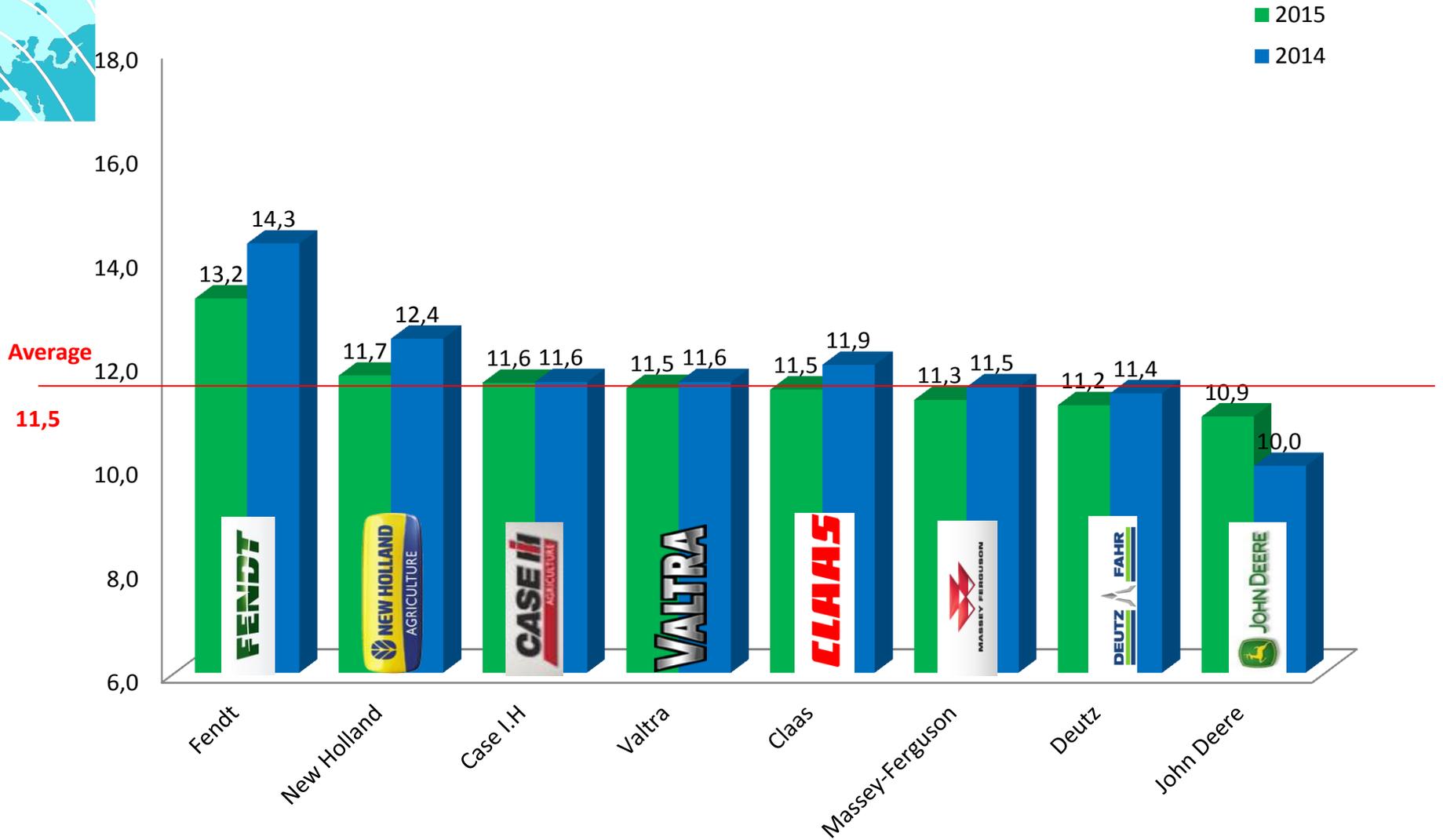
# 9. THE MANAGEMENT - Result 2015/ 2014



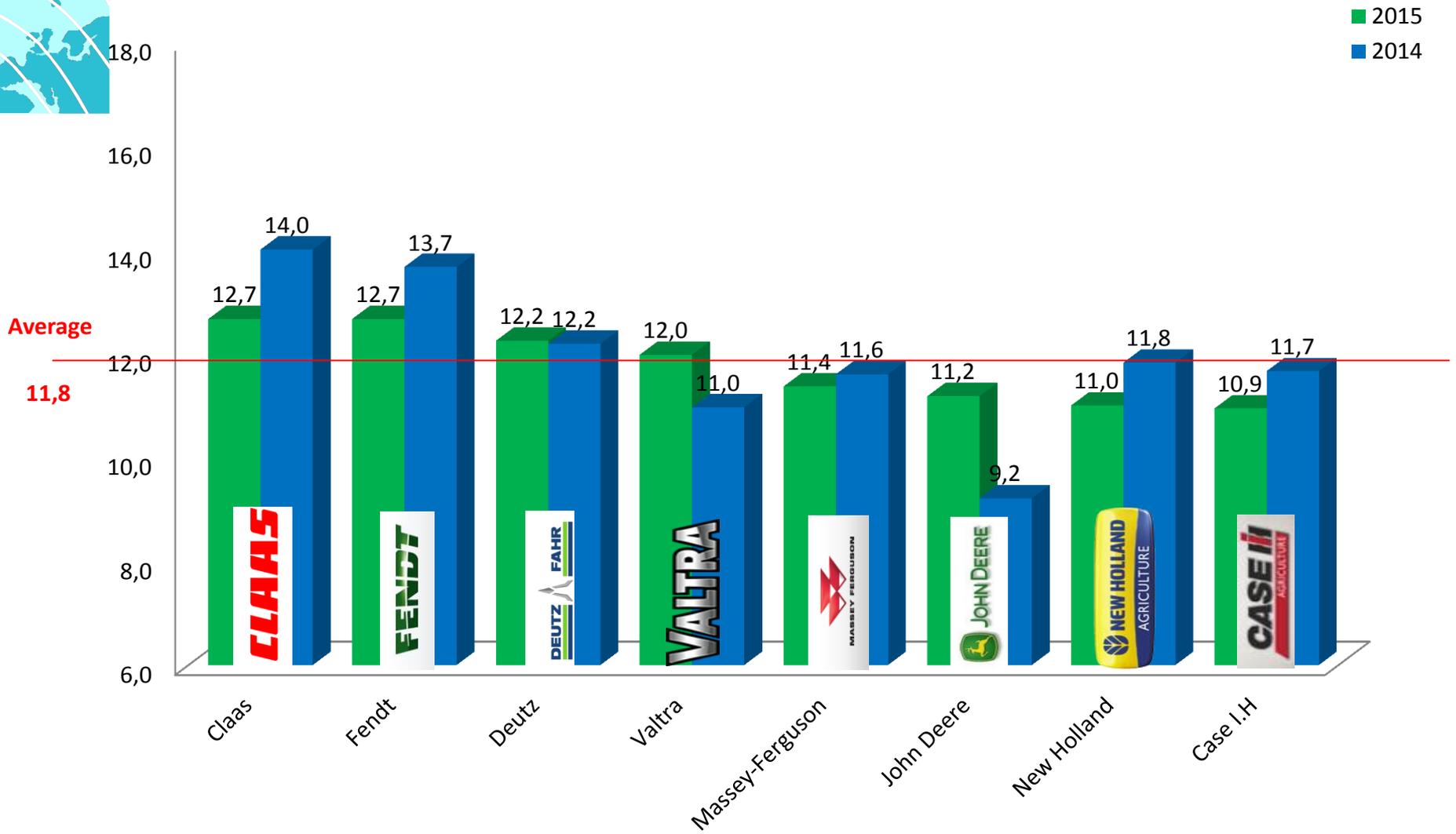
## 10. MANUFACTURER-DEALER RELATIONS- Result 2015/ 2014



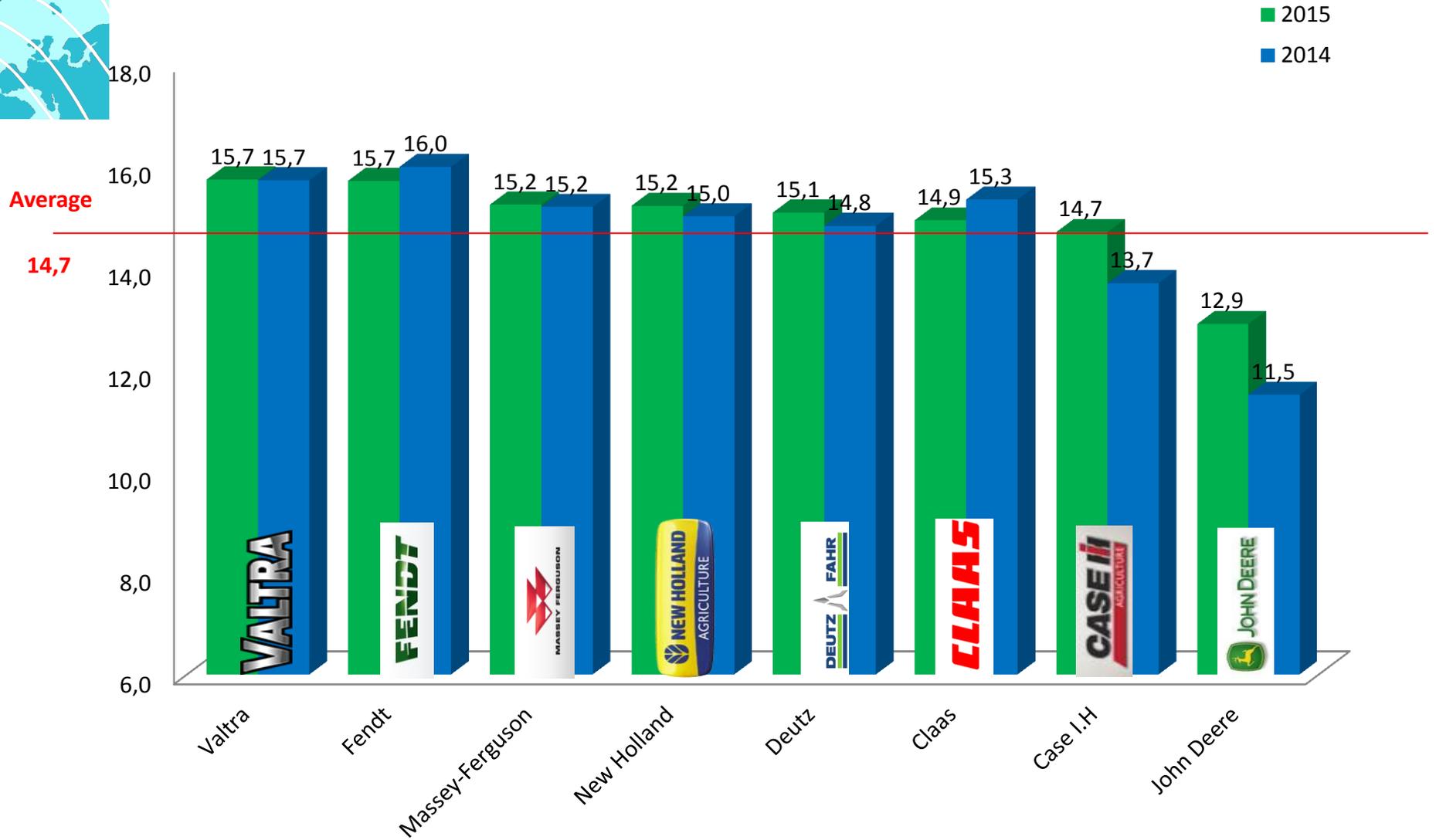
# 11. PROFITABILITY CONTRIBUTION- Result 2015/ 2014



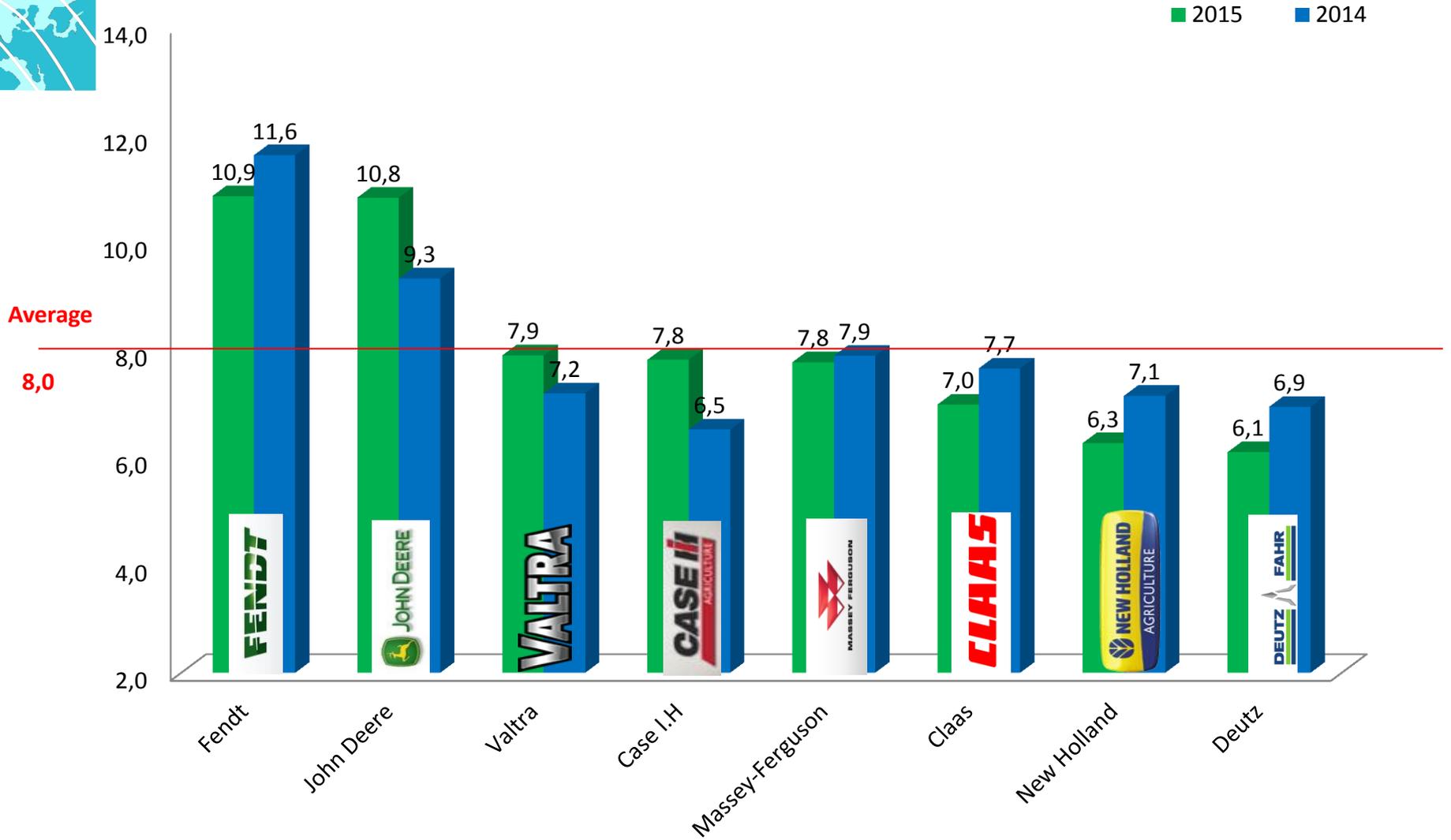
## 12. IMPROVEMENTS - Result 2015/ 2014



# 13. FINANCING - Result 2015/ 2014

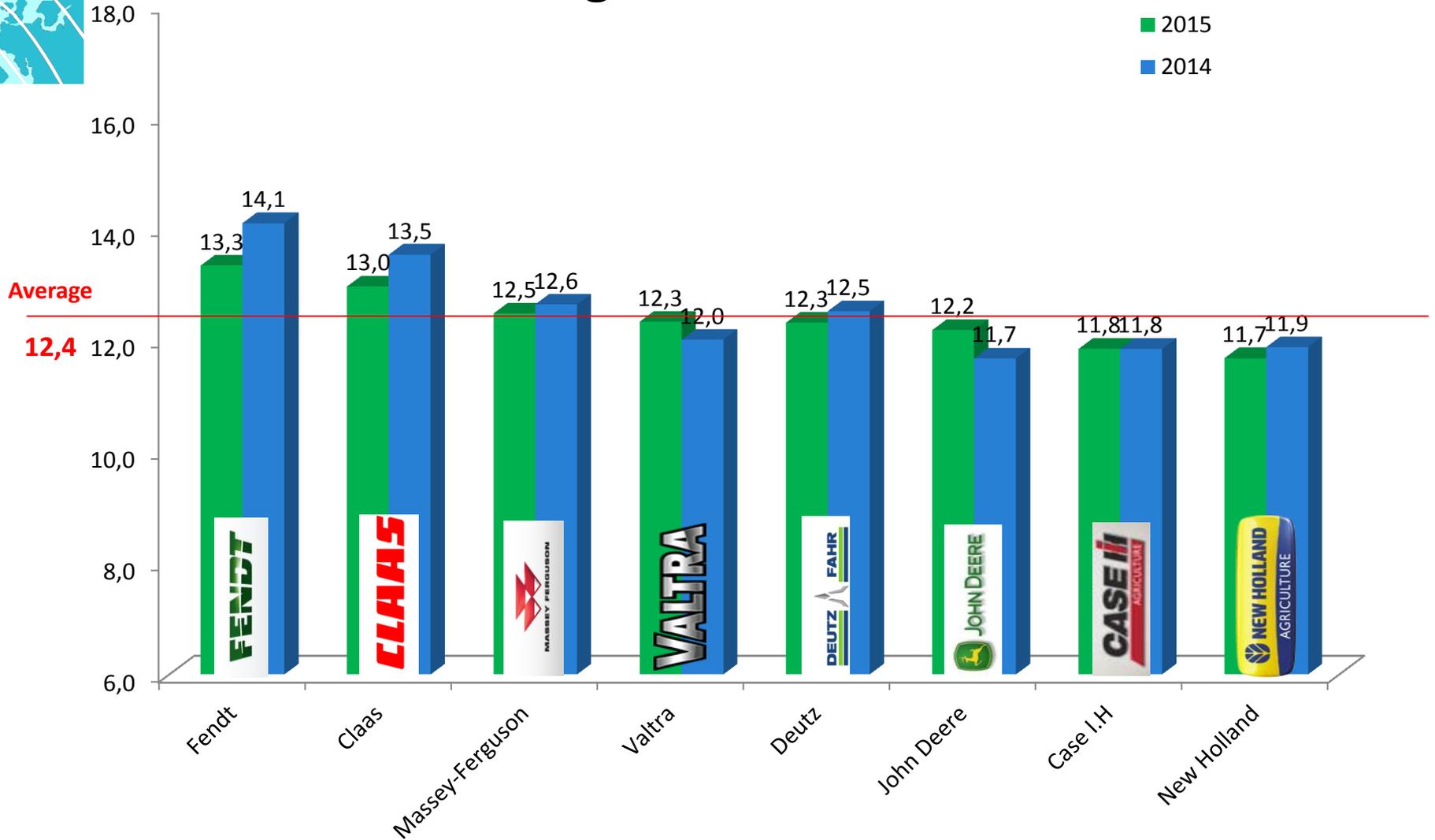


# 14. ANTI-THEFT - Result 2015/ 2014



# CONCLUSION

## Brand average – all countries 2015





Thank you for your  
attention!  
For more information  
and this presentation:  
[WWW.CLIMMAR.COM](http://WWW.CLIMMAR.COM)