



**International Confederation of National Associations of Dealers
and Repairers of Agricultural and Gardening Machinery**



01. Who we are

02. Who are our members

03. Branch Structure

04. Dealer Satisfaction Index

05. Current Trends

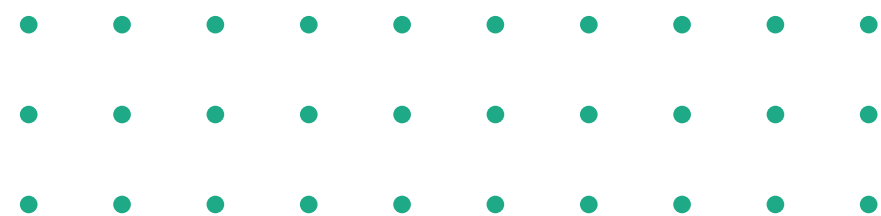


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01.

Who we are



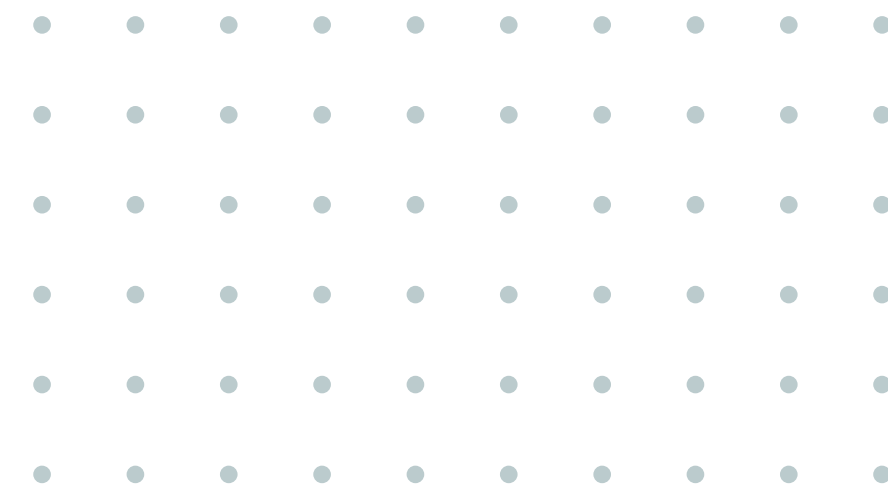


CLIMMAR

Founded in 1953, CLIMMAR is the international distributors network of national associations in the Agricultural Machinery and Equipment sector, based in Brussels.

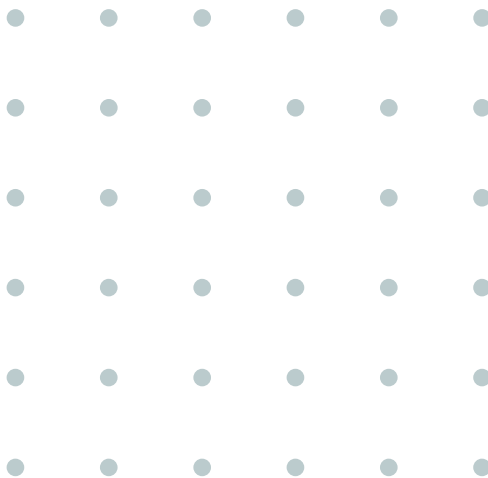
We are:

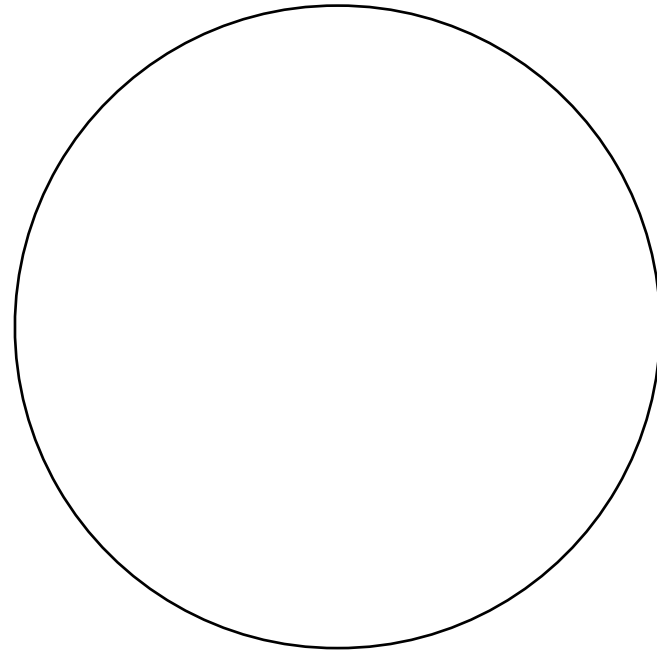
- Safeguarding the interests of equipment dealers,
- Establishing sustainable links between national professional organisations,
- Representing the sector at EU and international levels,
- Organising visits to trade fairs and exhibitions,
- Promoting relations between members for better business management,
- Encouraging exchanges between young students.





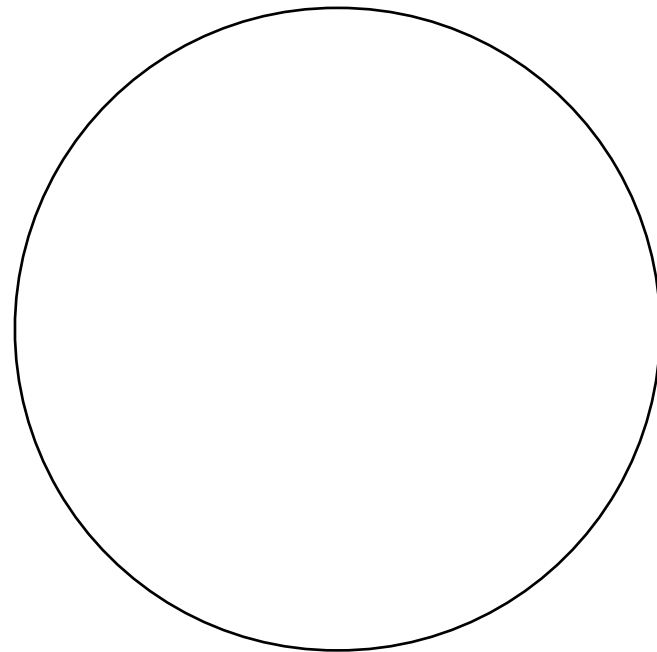
CLIMMAR Board





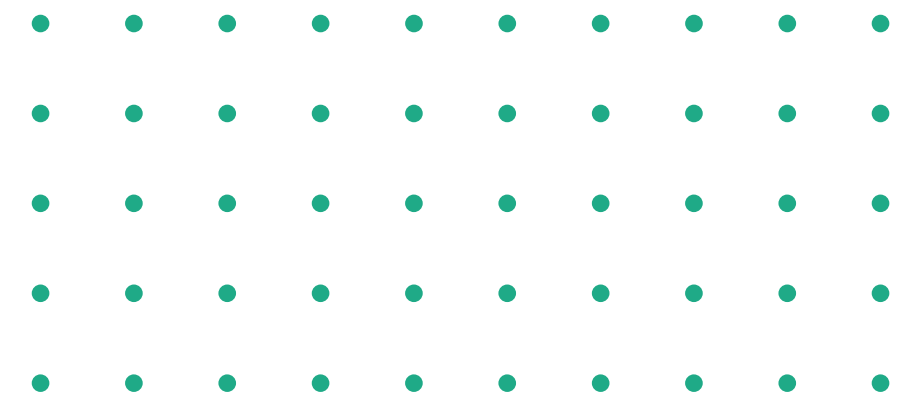
Dealer Satisfaction Index

Survey of members' satisfaction development with suppliers. The aim is to work with manufacturers on improvements.



Branch Report

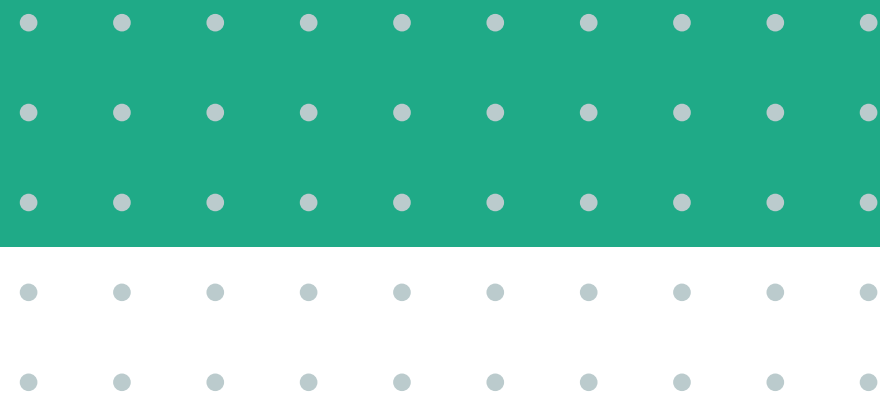
Provides data and statistics from CLIMMAR members on business performance and expectations.



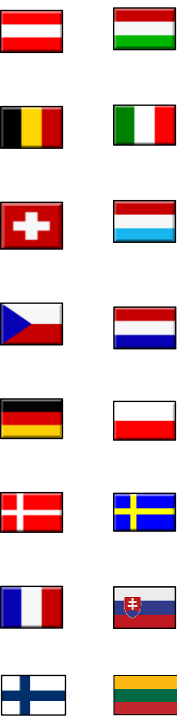
OUR
Reports

02.

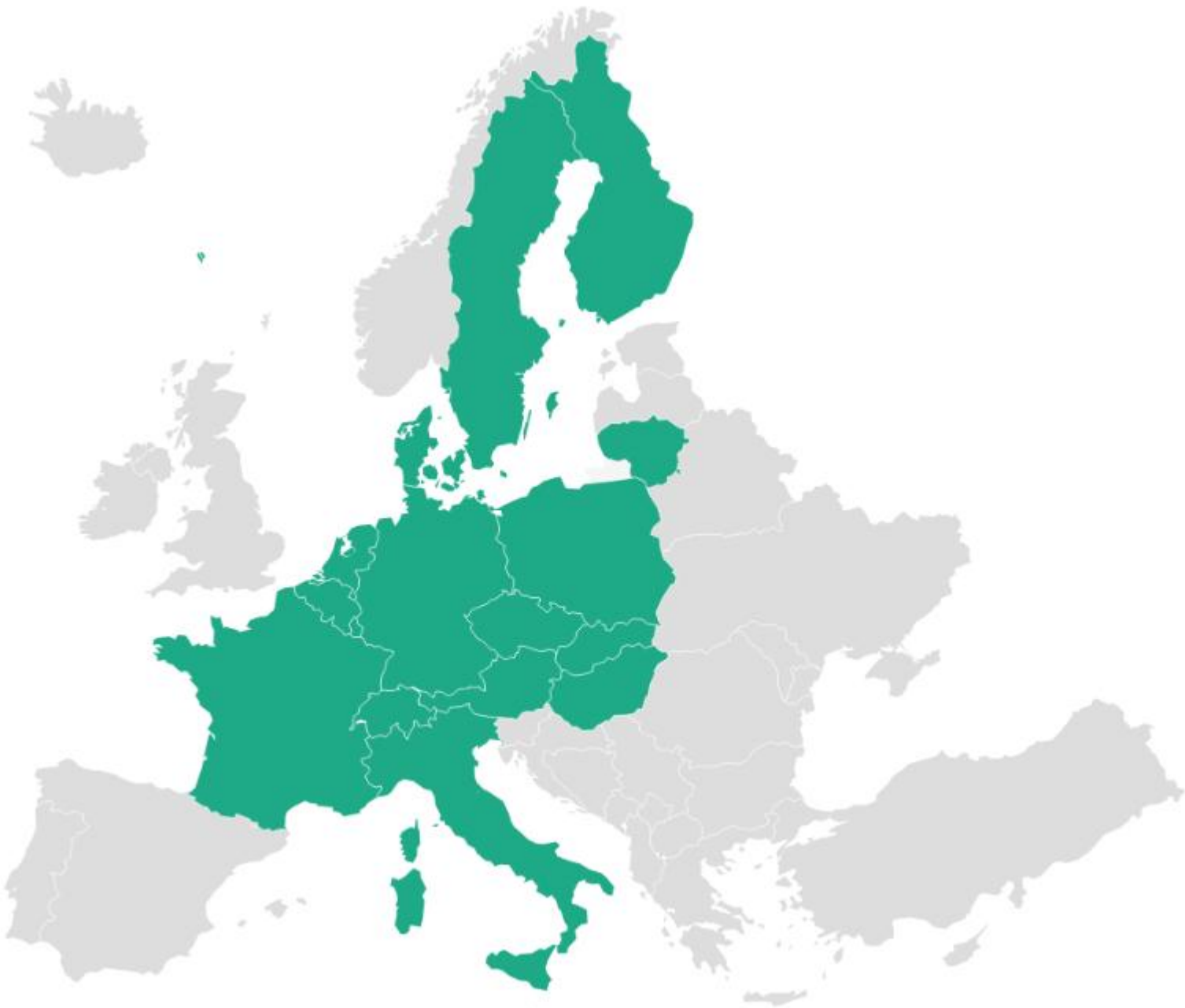
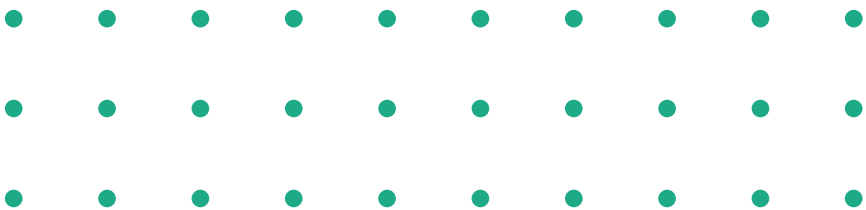
Who are our members



CLIMMAR Members



- CLIMMAR has member associations from 16 European countries.
- They represent dealers, importers and traders of agricultural and garden machinery.



03.

Branch Structure



Branch Structure



Dealers: 14.849*



Employees: 164.582



Apprentices: 18.566***



Turnover: 48.725 Mio. €

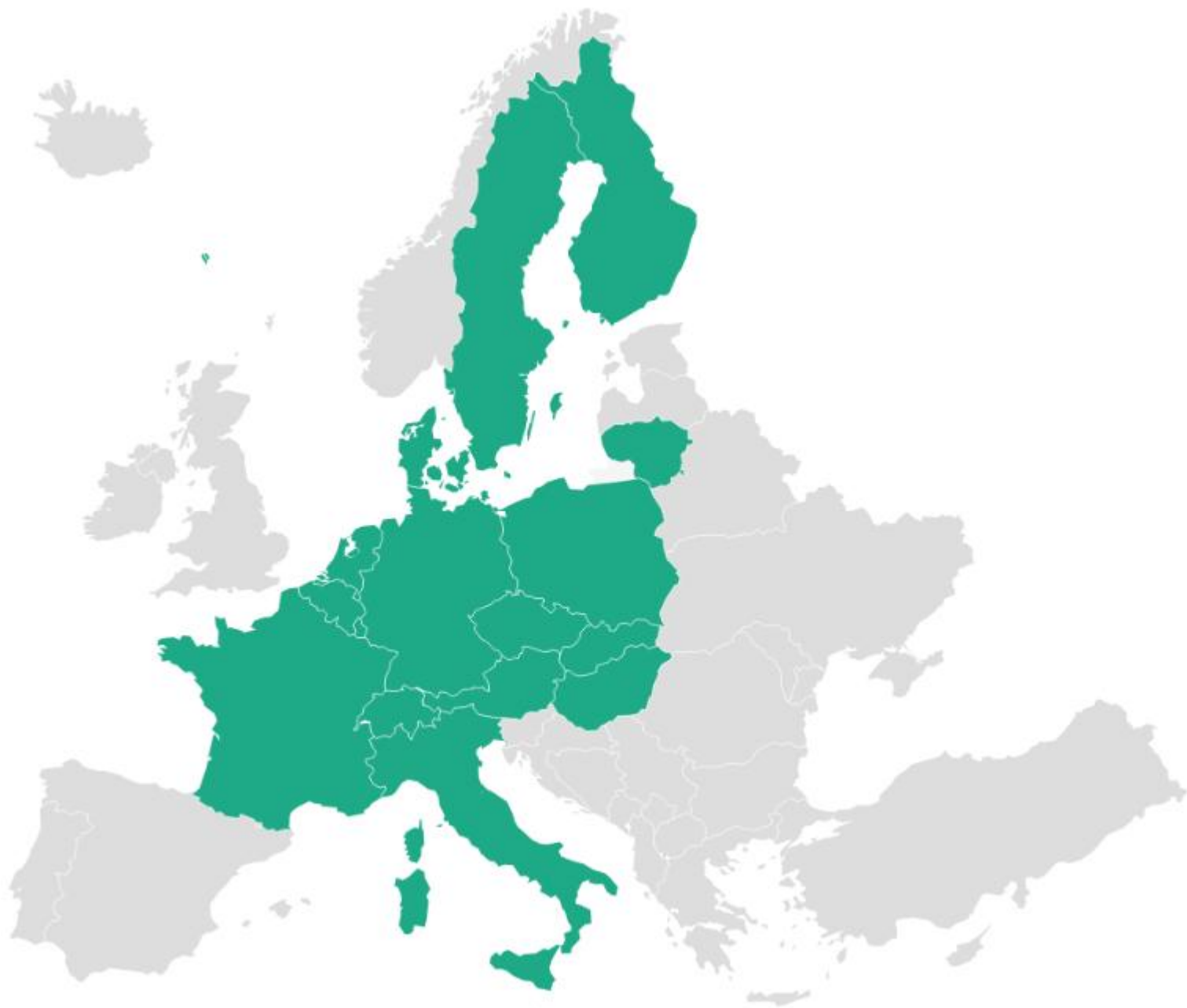
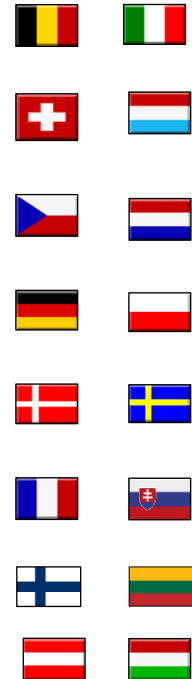
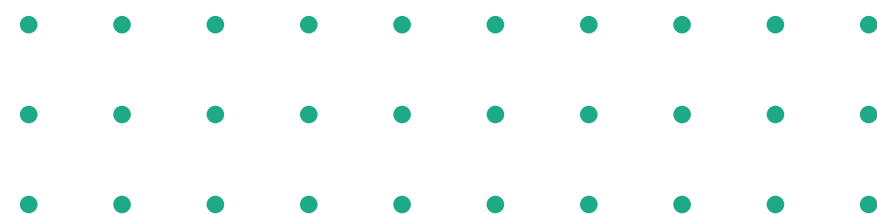


Tractor sales: 113.369



Combine sales: 5.192 **

* without Lithuania - ** without Poland - *** without Poland and Sweden



Branch Structure

 Turnover per company: 3.281.365 €

 Employees per company: 11,1*

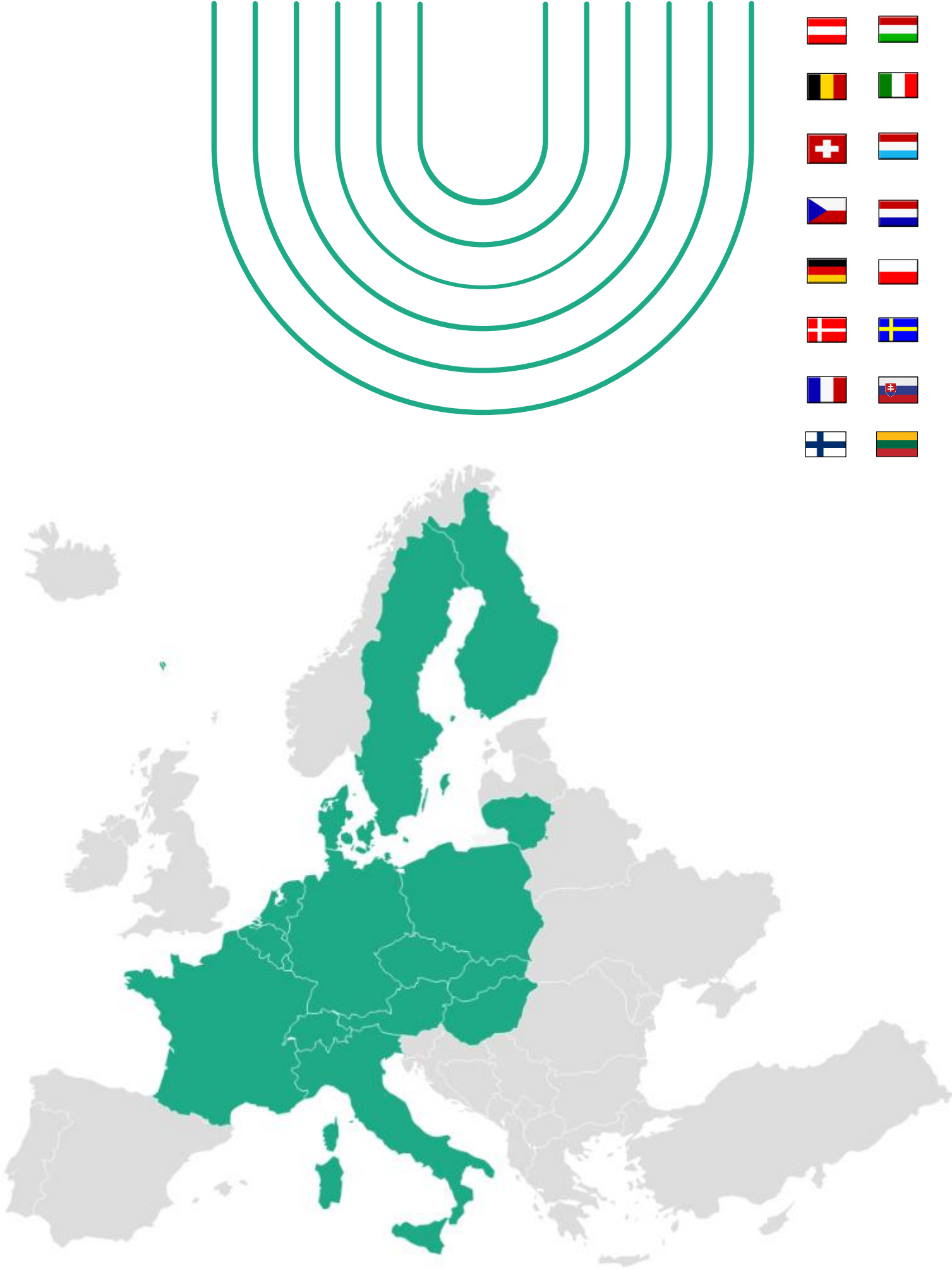
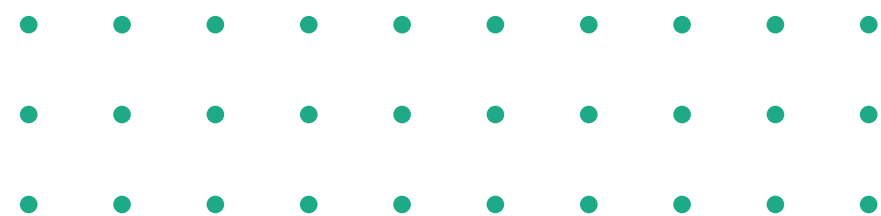
 Turnover per employee: 296.000 €

 Apprentices per company: 1,4***

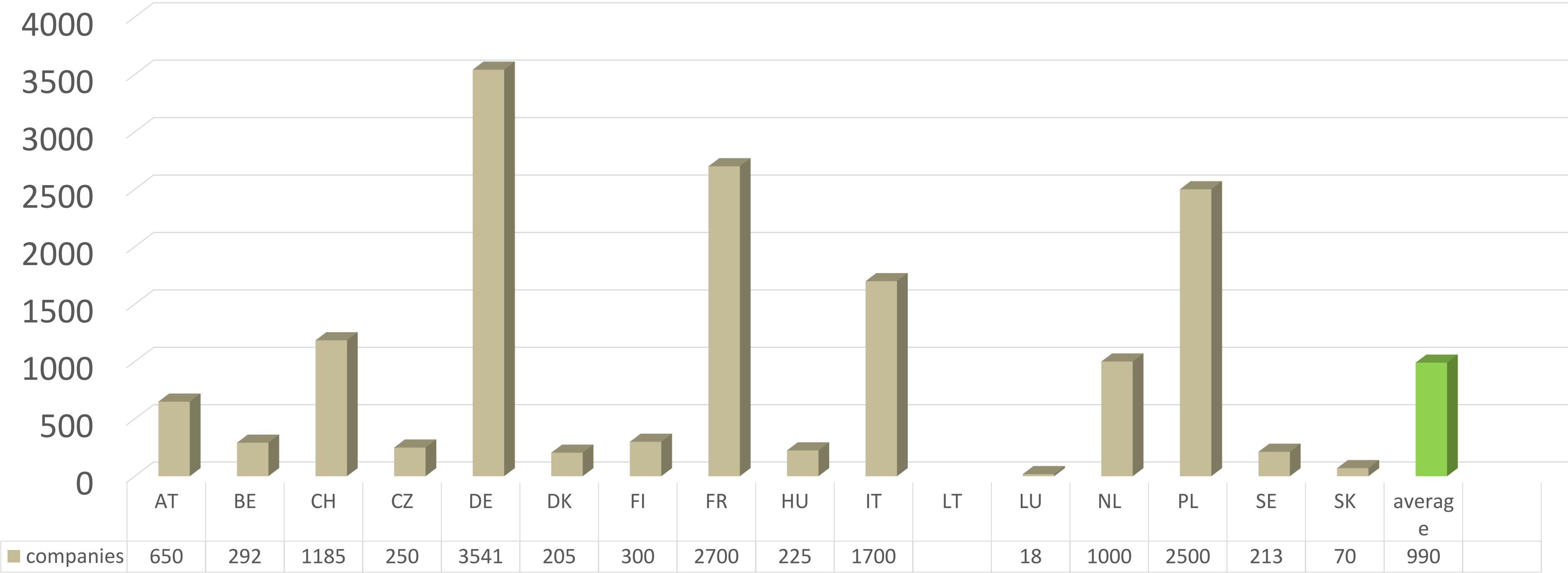
 Tractor sales per company: 7,6

 Tractor sales >50 hp per company: 5,7

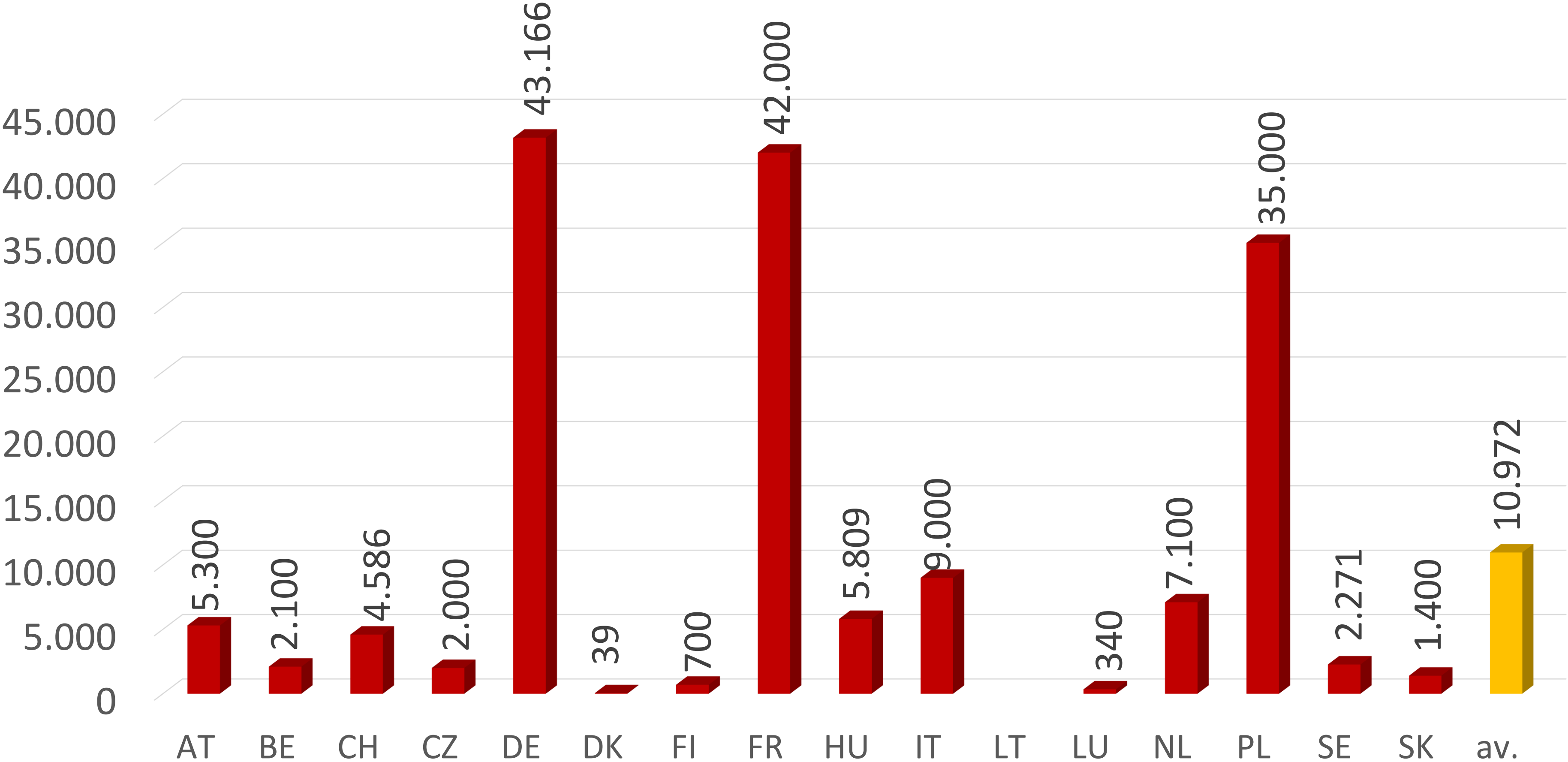
* without Lithuania - ** without Poland - *** without Poland and Sweden

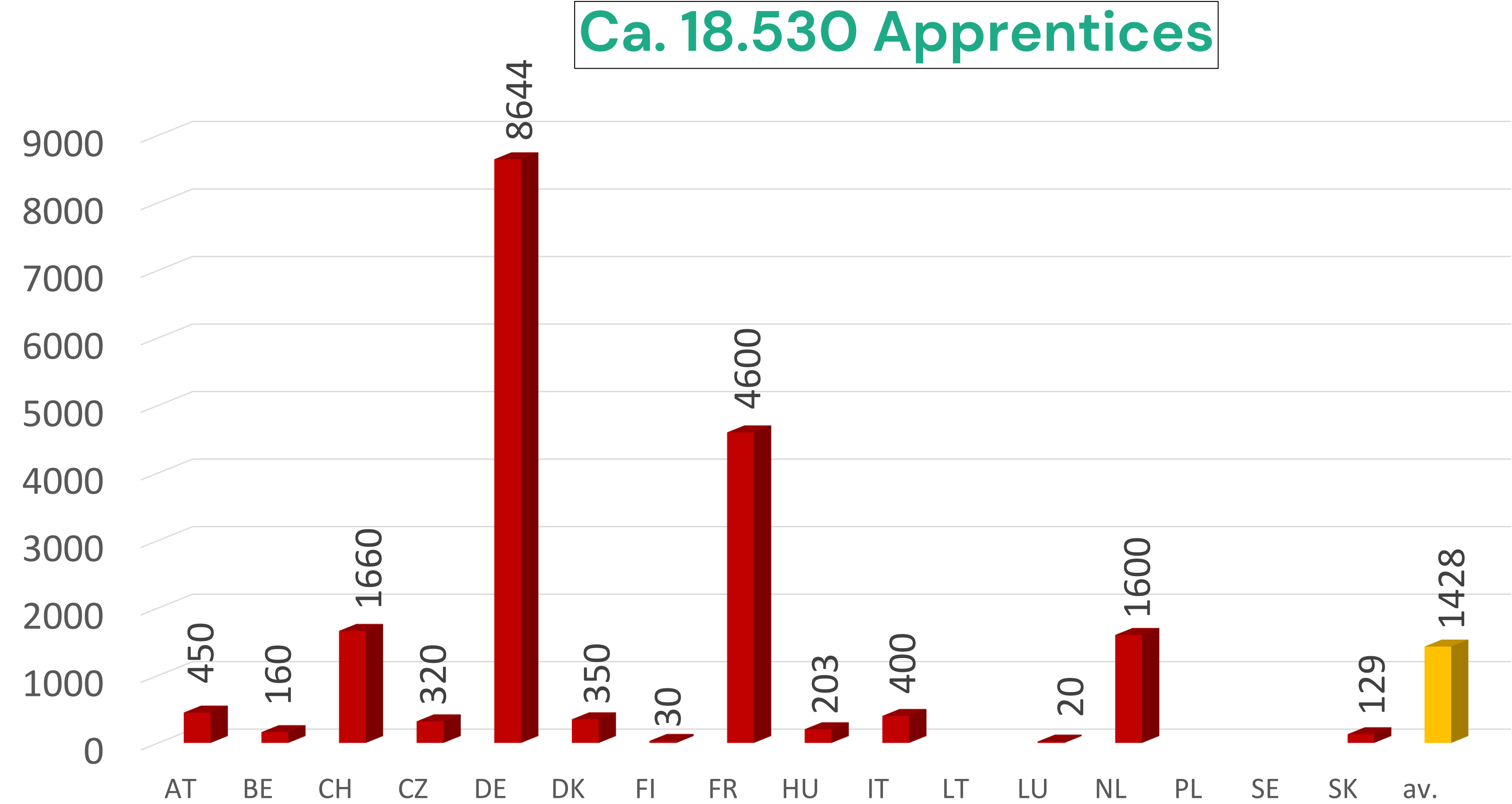


Number of Companies: 14,849 Dealers (incl. satellites) & Servicefirms

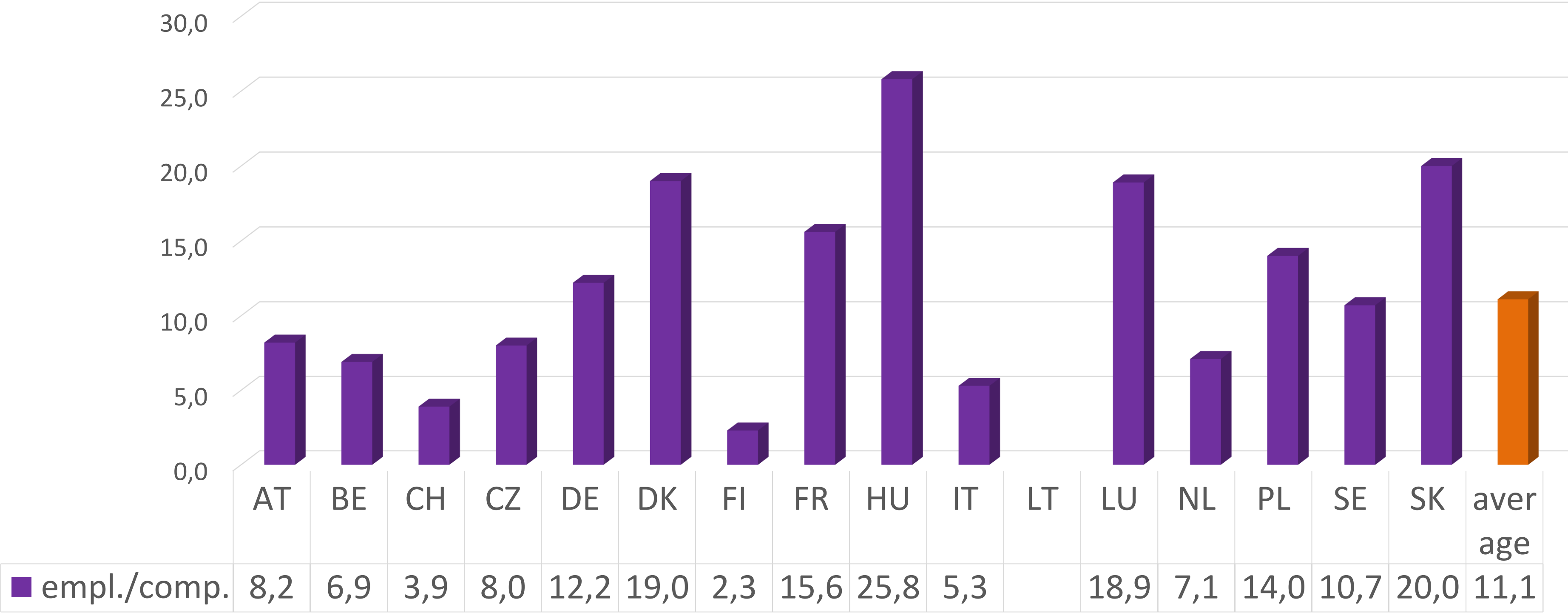


Ca. 164.600 Employees



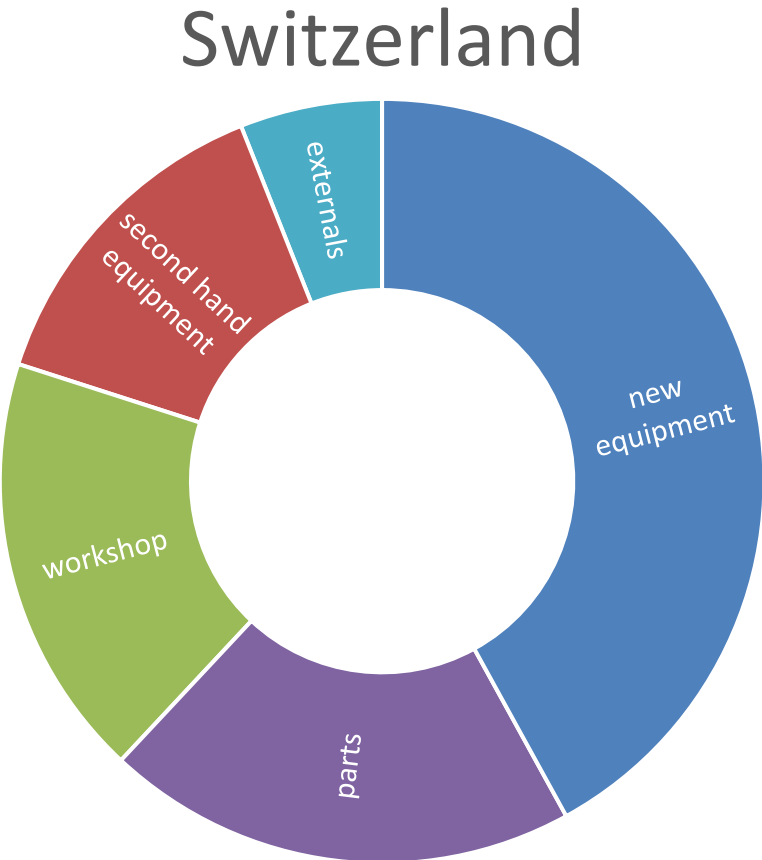
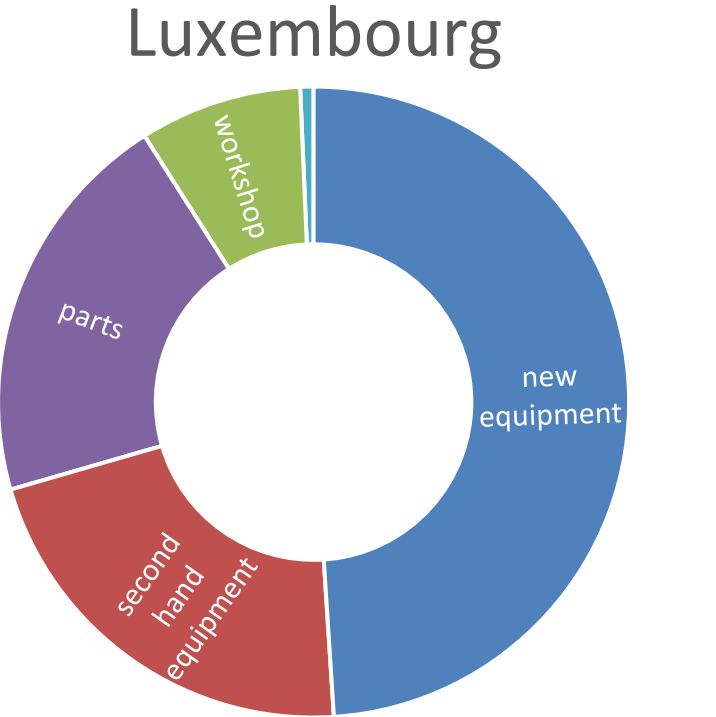
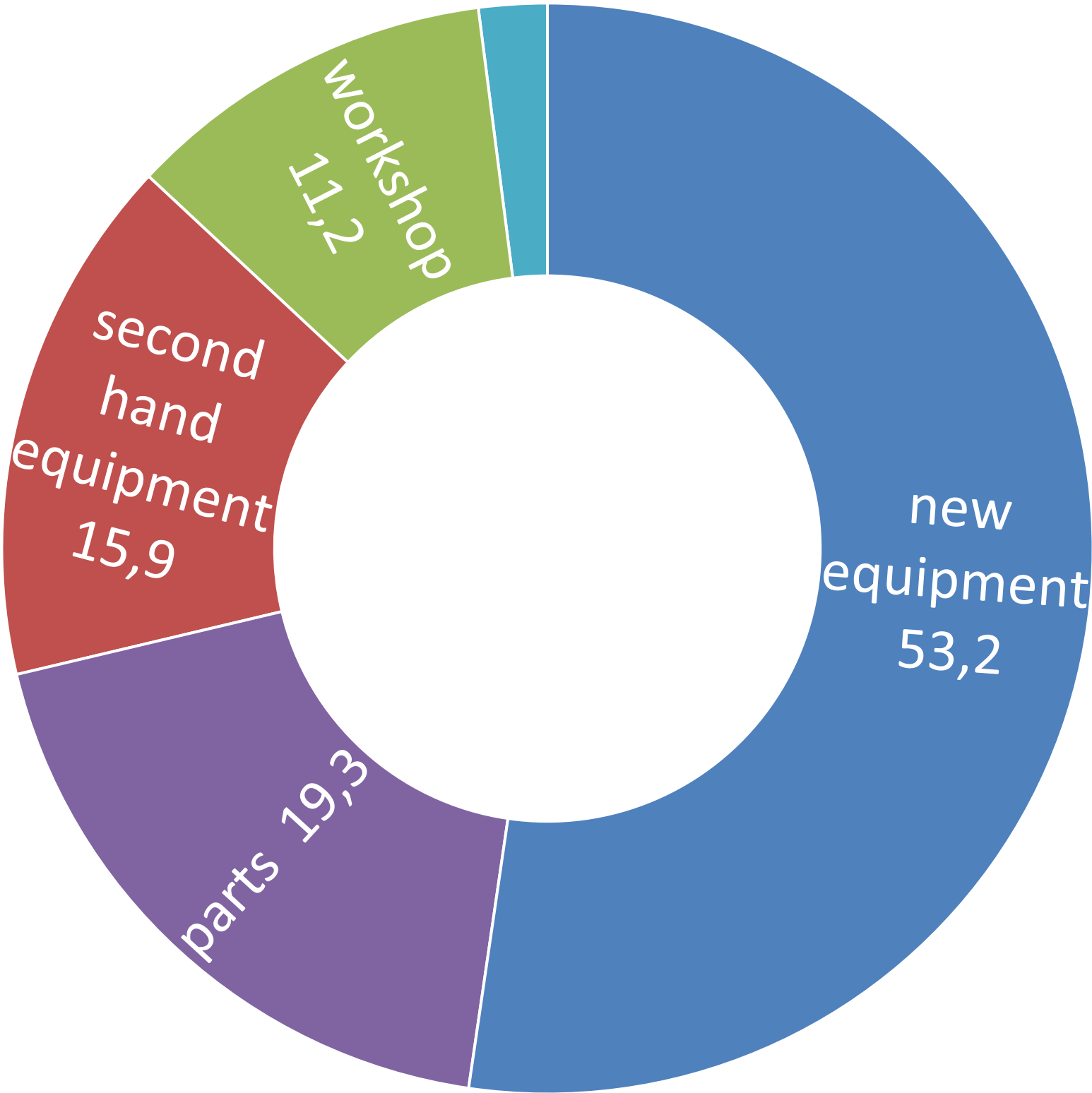
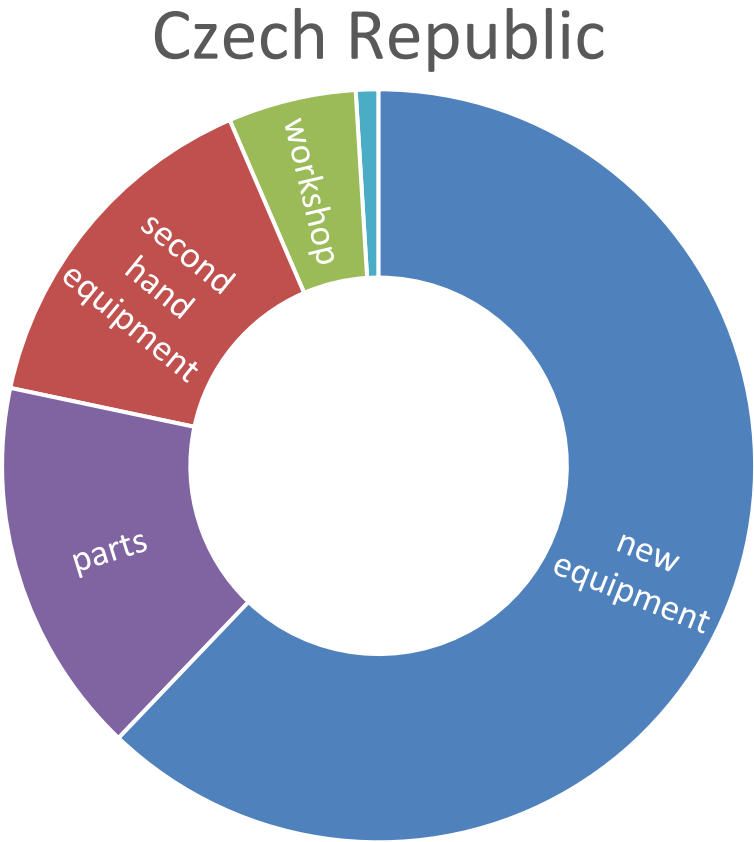
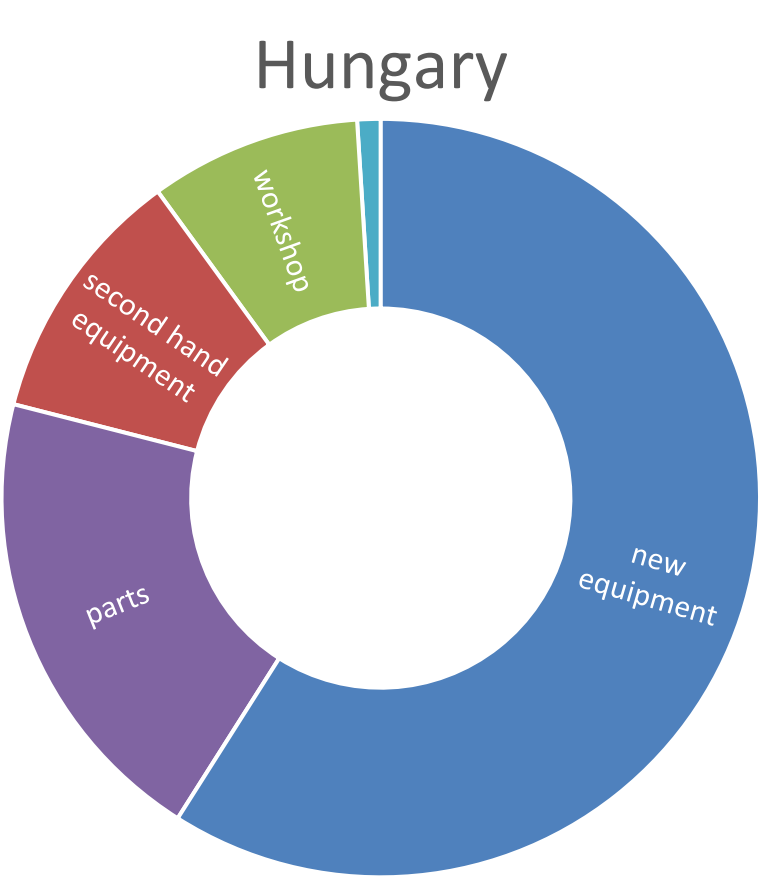


Relations – Employees per Company: 11.1



Turnover structure (%) in average European dealerships

part: **basic data**



04.

Dealer Satisfaction Index



Reminder about the process



Start : April 2d 2025
End : May 28th 2025



10
countries
included



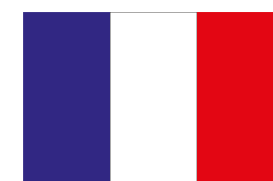
Germany



Belgium



Denmark



France



Luxembourg



Hungary



Italy



The
Netherlands



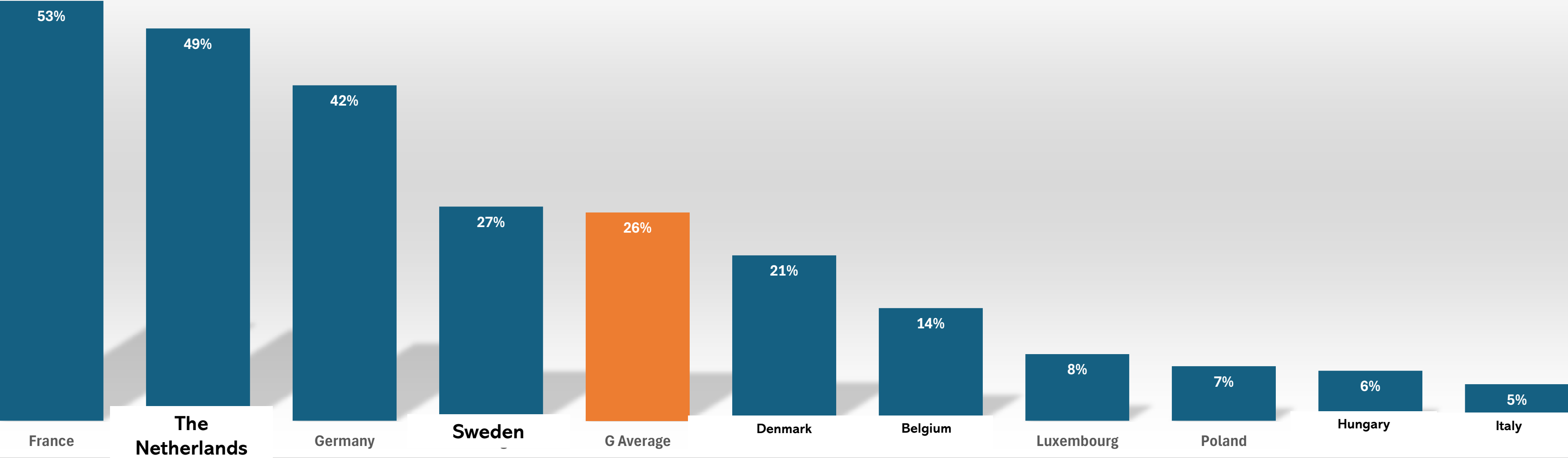
Poland



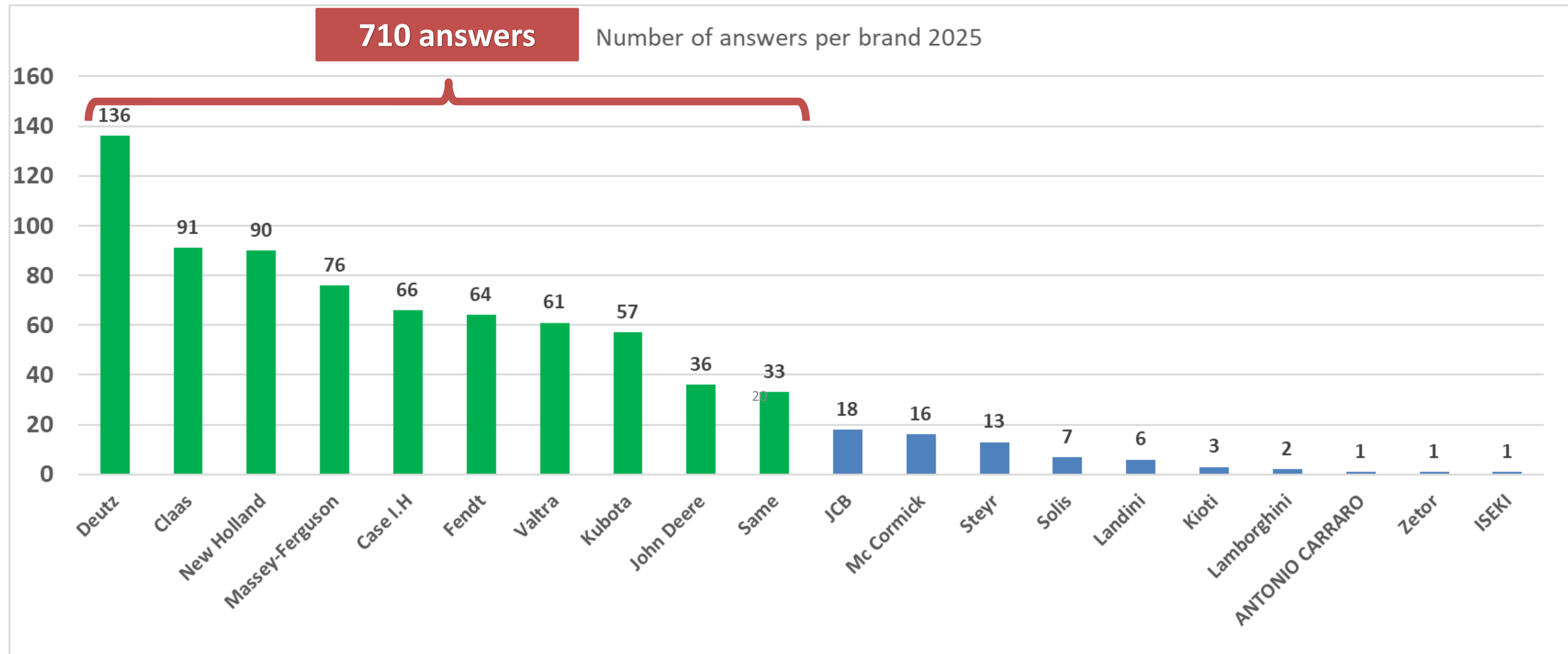
Sweden

Rate of answers per country

Rate of participation 2025 / country / All brands



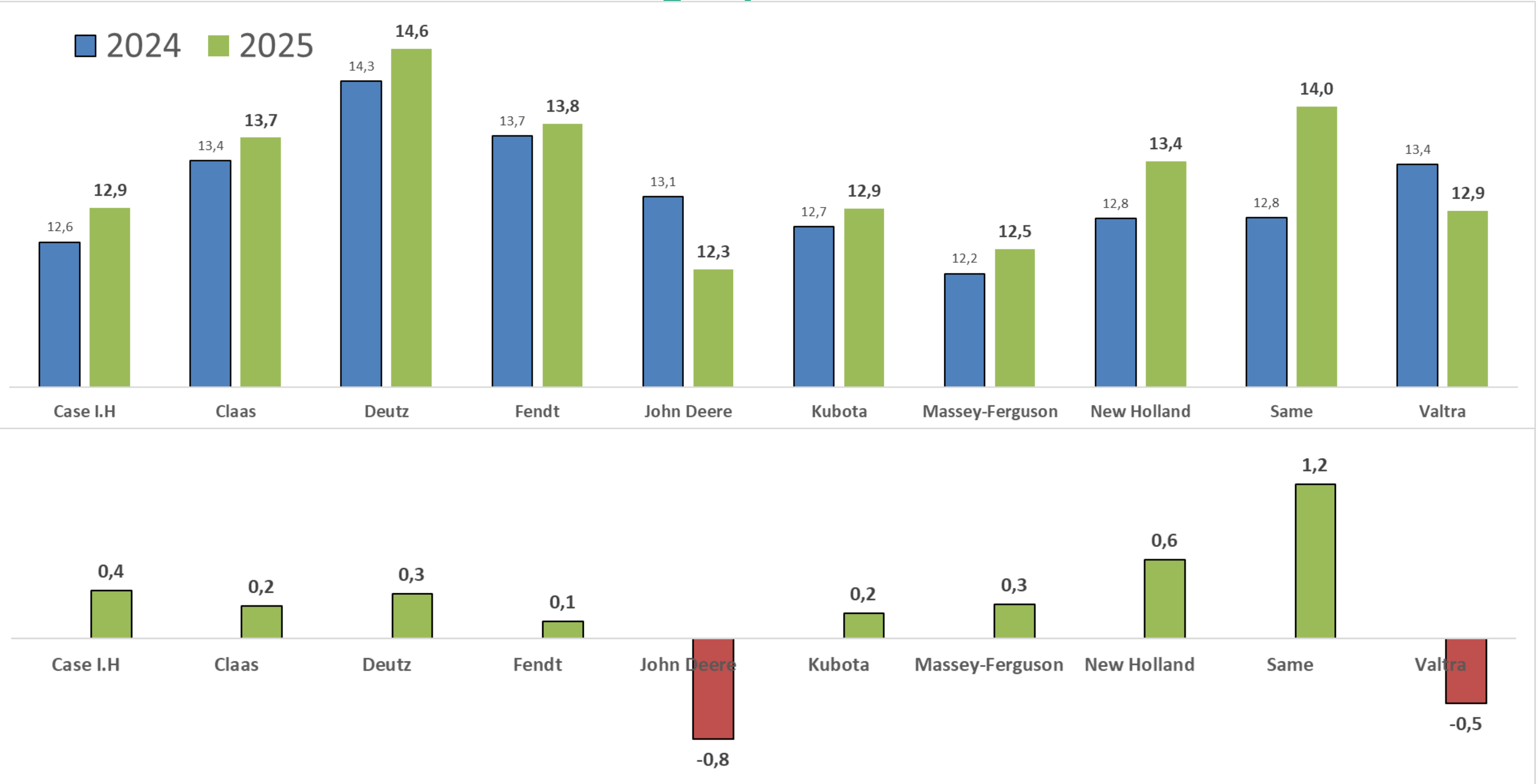
Number of answers per brand



III. RESULTS 2025 BY BRAND AND EVOLUTION/11 YEARS



General average by brand 2024 and 2025



BRAND ANALYSIS COMPARED 2025/2024 and 11-years evolution

CASE IH



FENDT

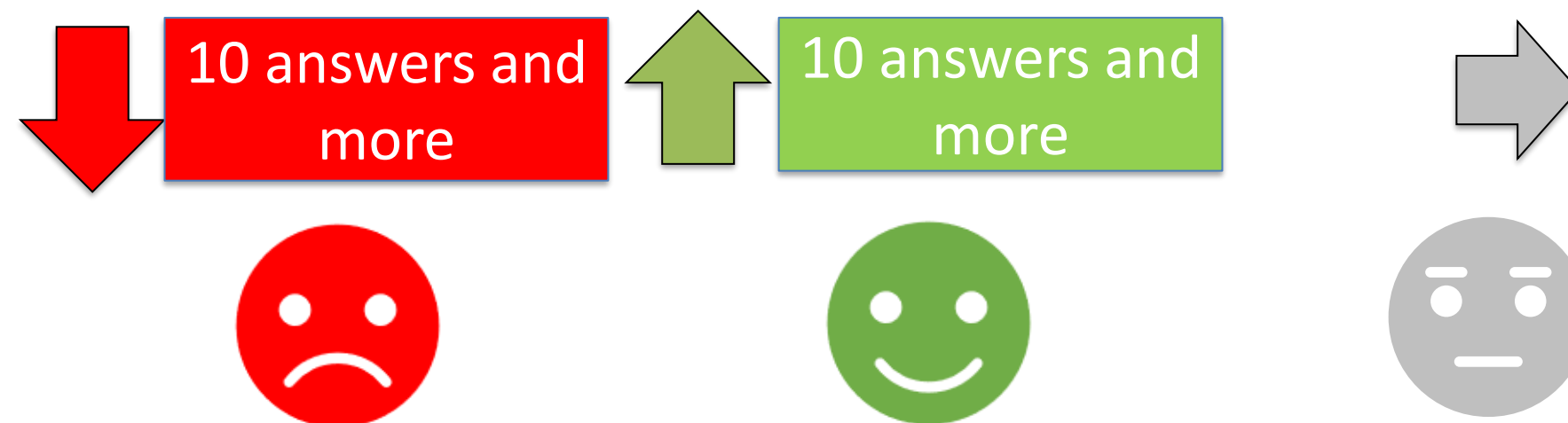
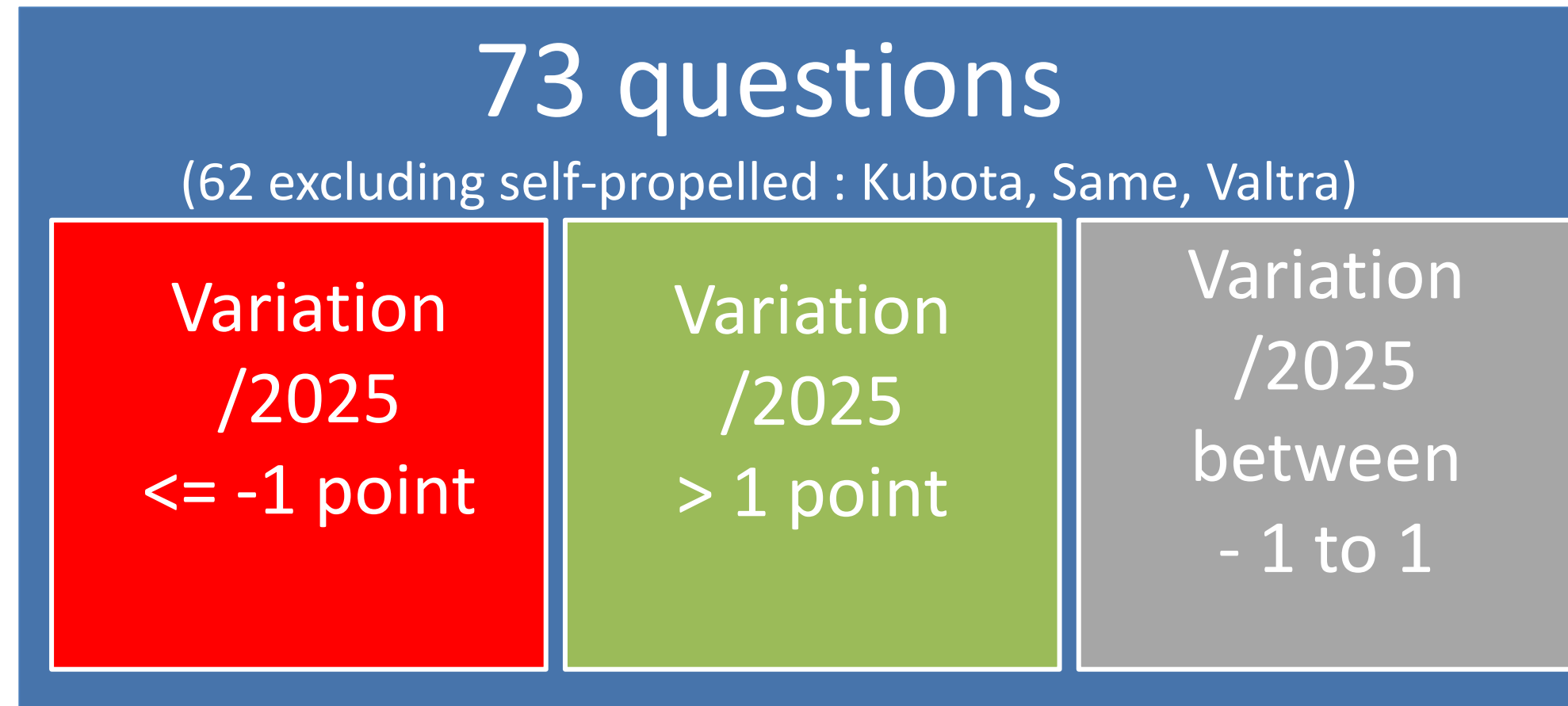


VALTRA



23

Legend : reading the diagram for each brand





Average 2025 : 12,9 (+0,4)

3 Q/73

9 Q/73

61 Q/73

25



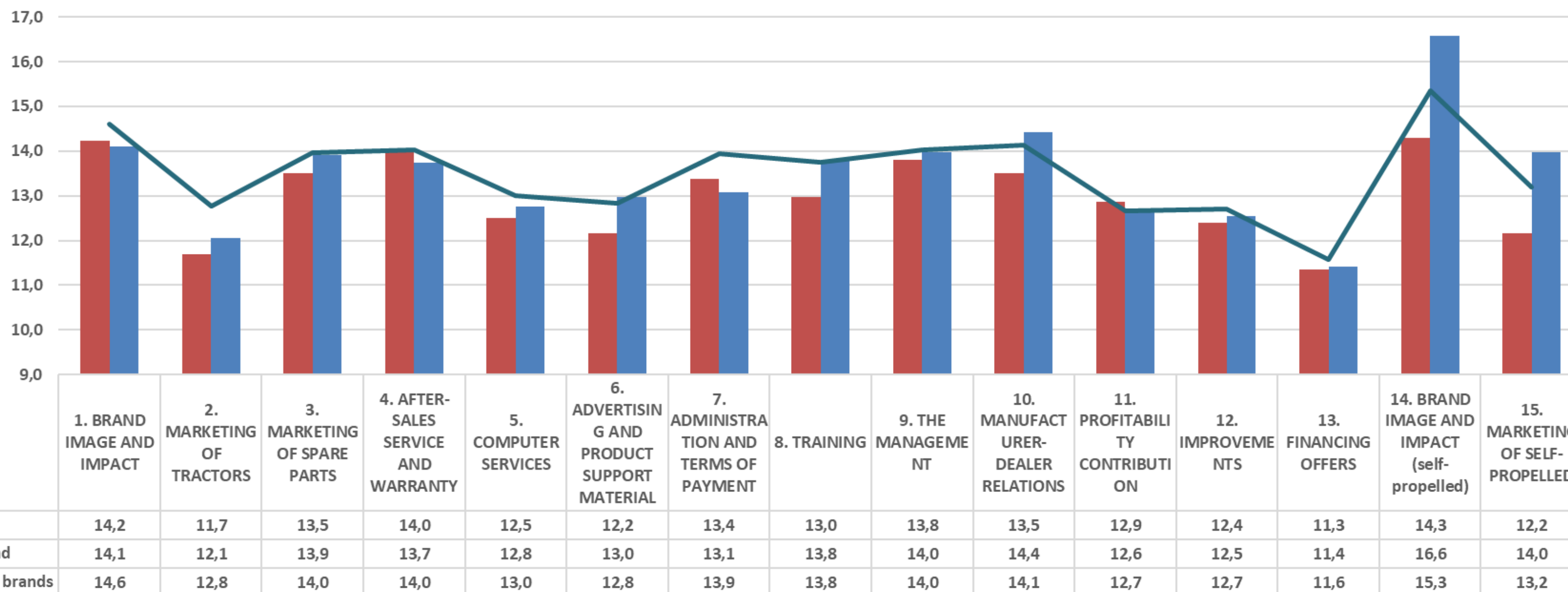
Average 2025 : 13,4 (+0,6)

1 Q/73

22 Q/73

50 Q/73

Score 2025 for each heading compared with the overall average for all brands





Average 2025: 13,8 (+0,1)

5/73

11/73

57/73

Average 2025 : 12,9 (-0,5)

13/62

2/62

47/62



MASSEY FERGUSON



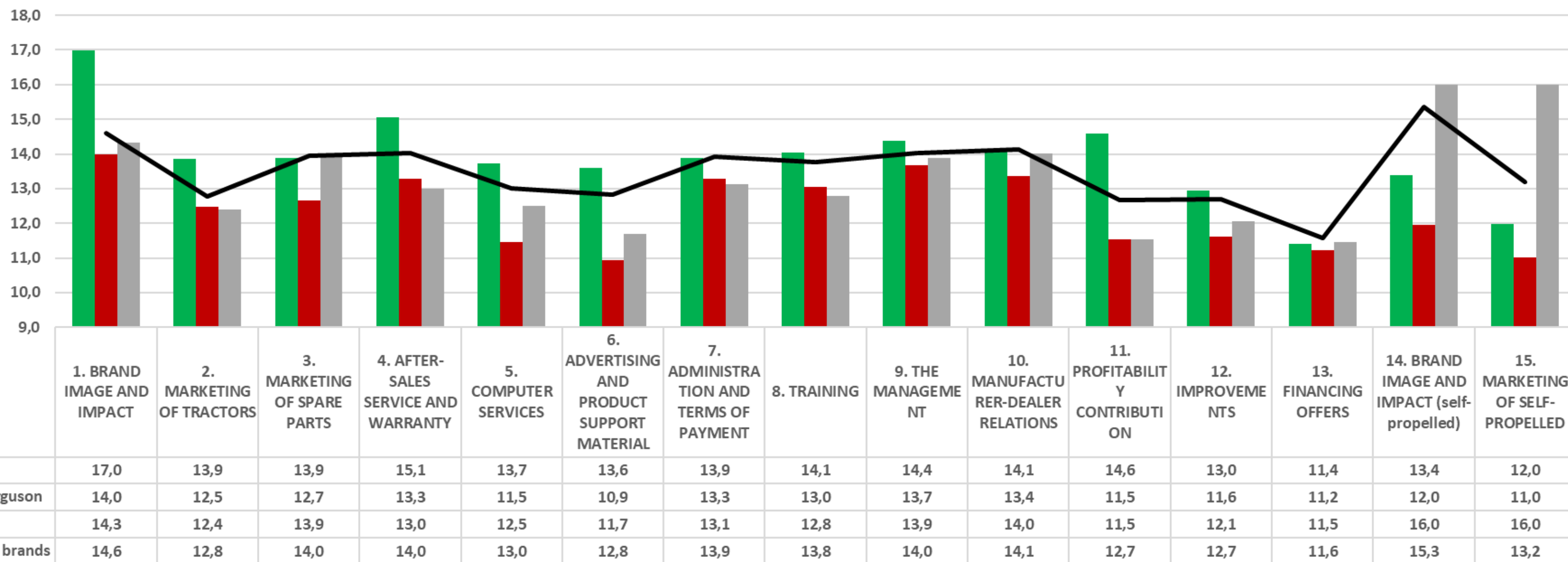
Average 2025: 12,5 (+0,3)

2/73

14/73

57/73

Score 2025 for each heading compared with the overall average for all brands





Average 2025 : 14,6 (+0,3)

0/73

8/73

65/73



SAME



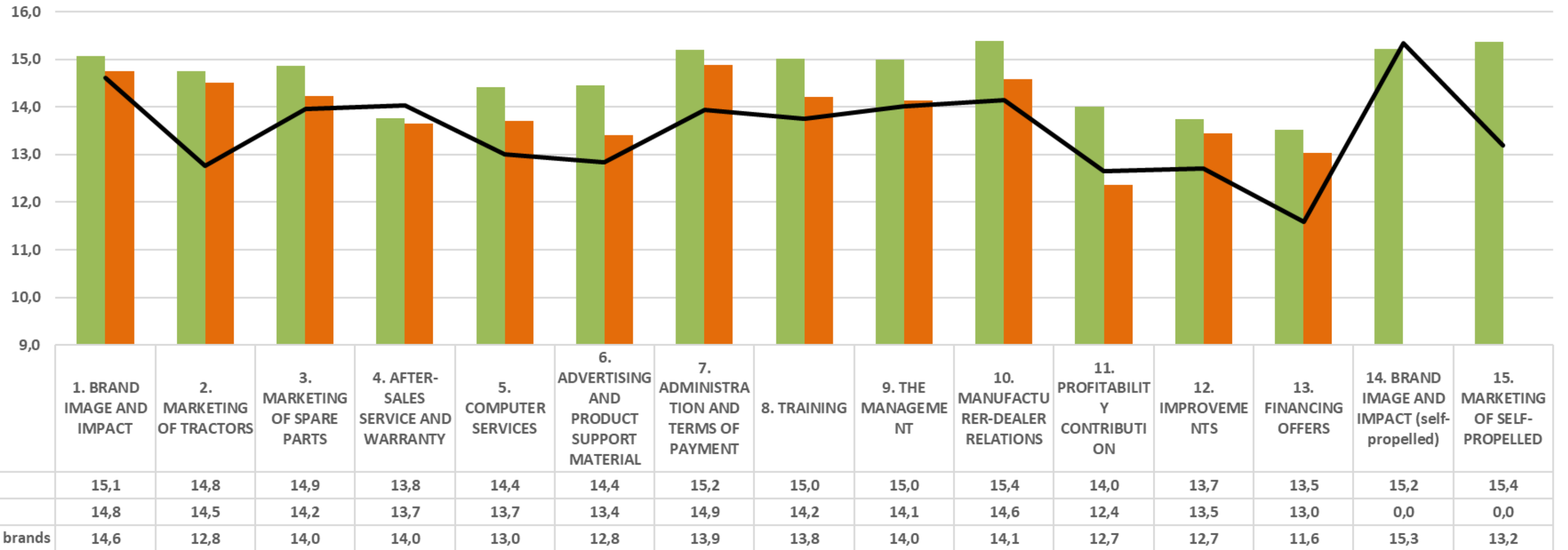
Average 2025 : 14 (+1,2)

0/62

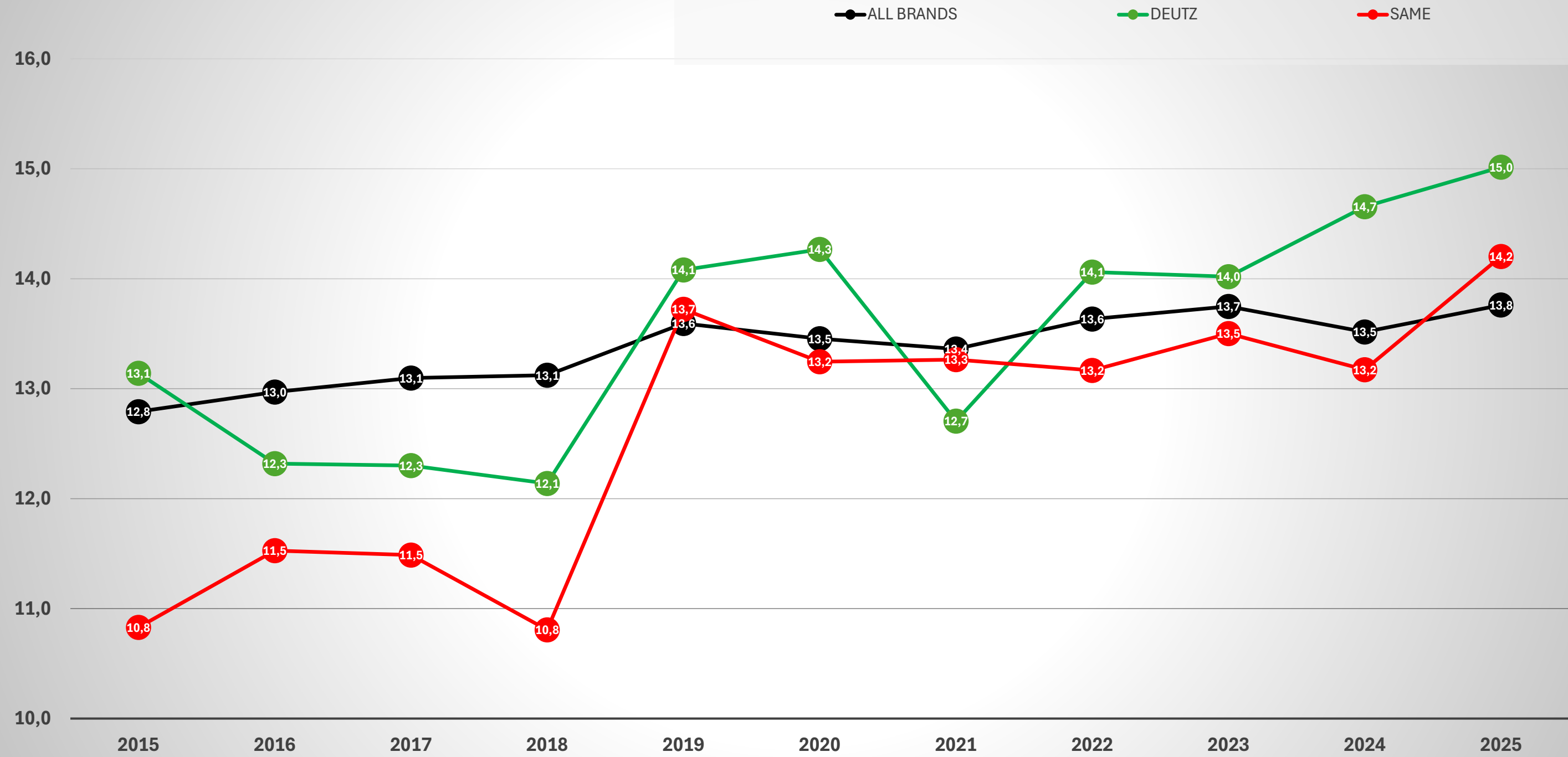
39/62

23/62

Score 2025 for each heading compared with the overall average for all brands



8. TRAINING





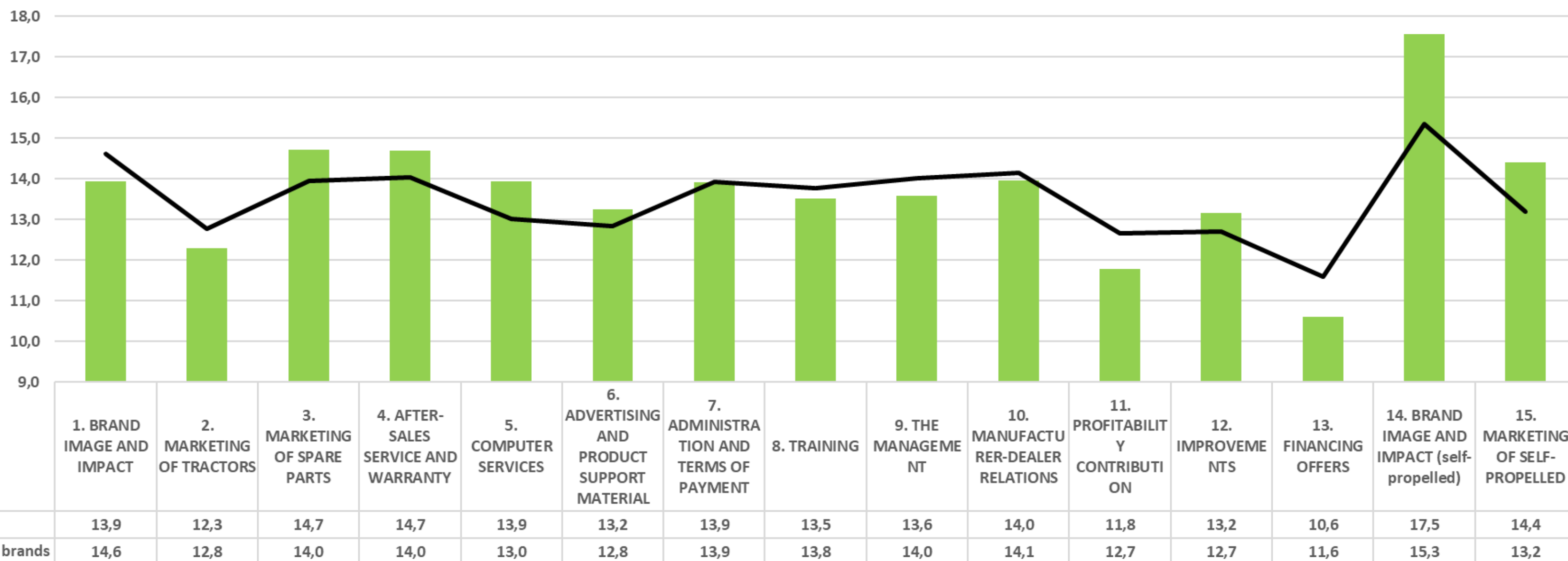
General average 2025: 13,7 (+0,2)

0/73

4/73

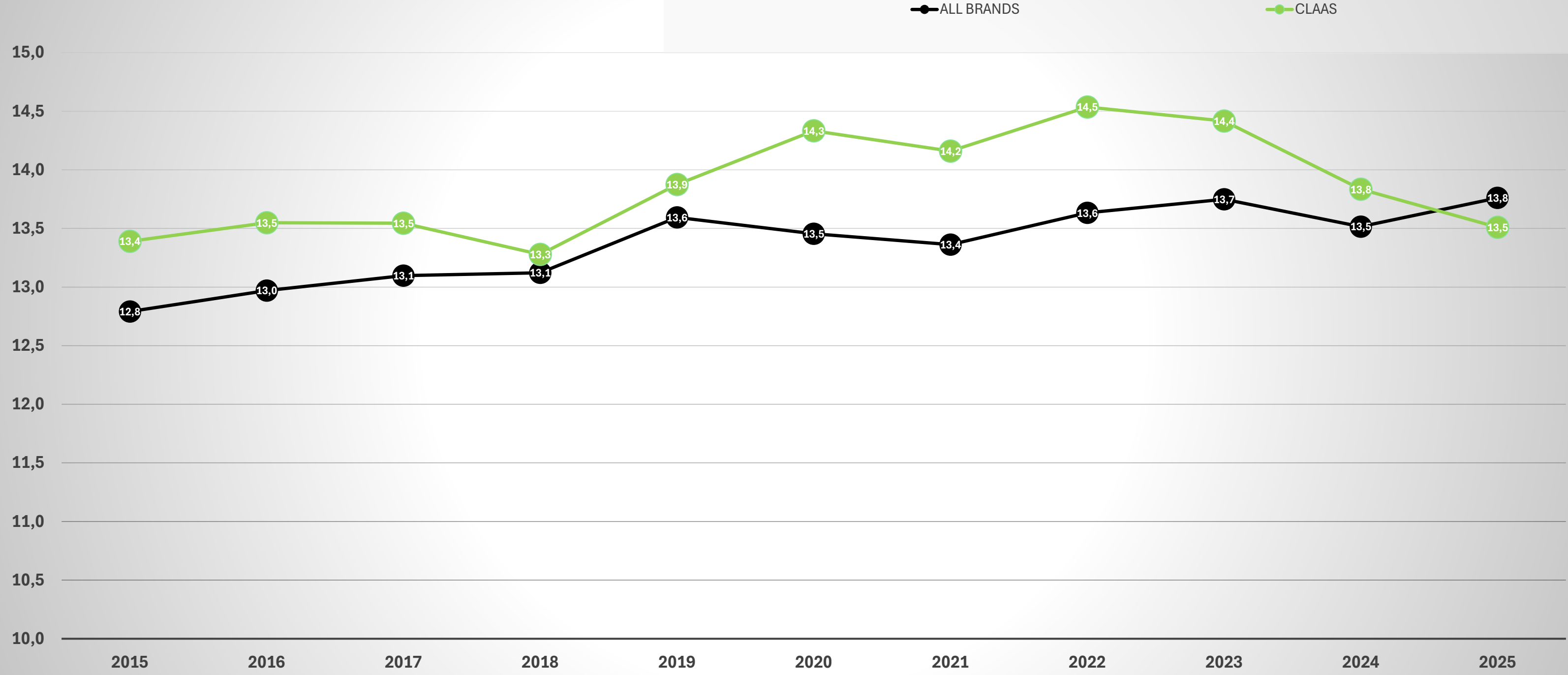
69/73

Score 2025 for each heading compared
with the overall average for all brands





8. TRAINING





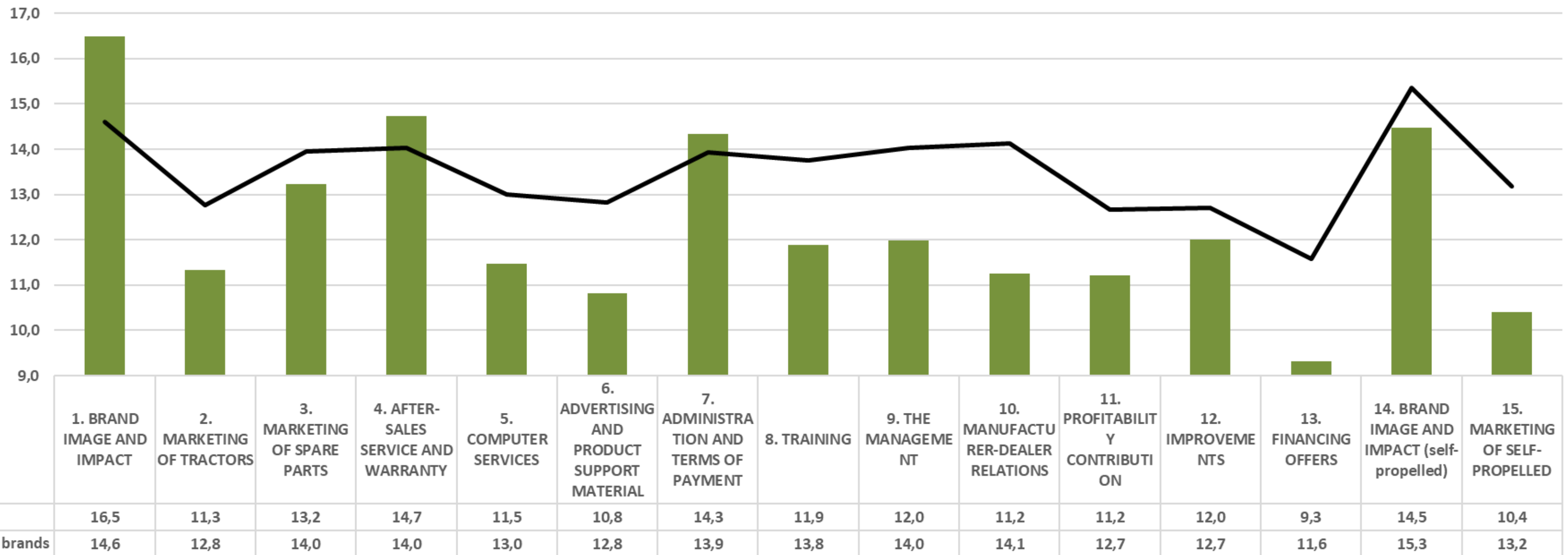
Average 2025: 12,3 (-0,8)

27/73

2/73

44/73

Score 2025 for each heading compared with the overall average for all brands



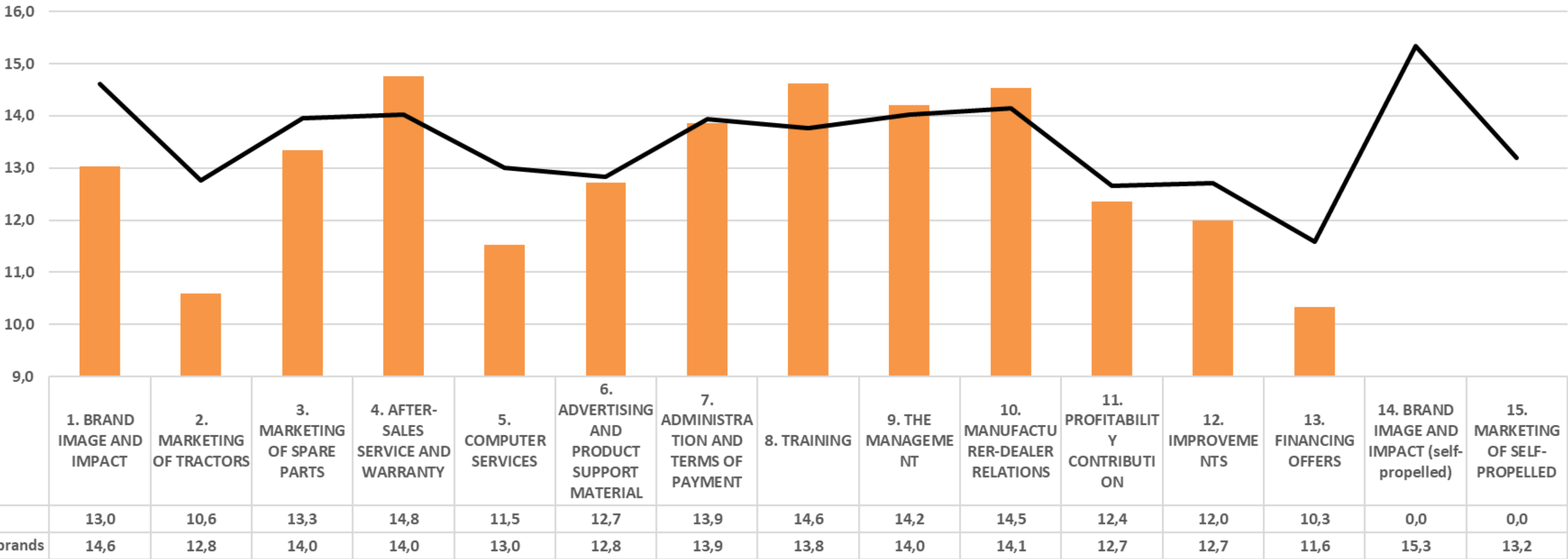


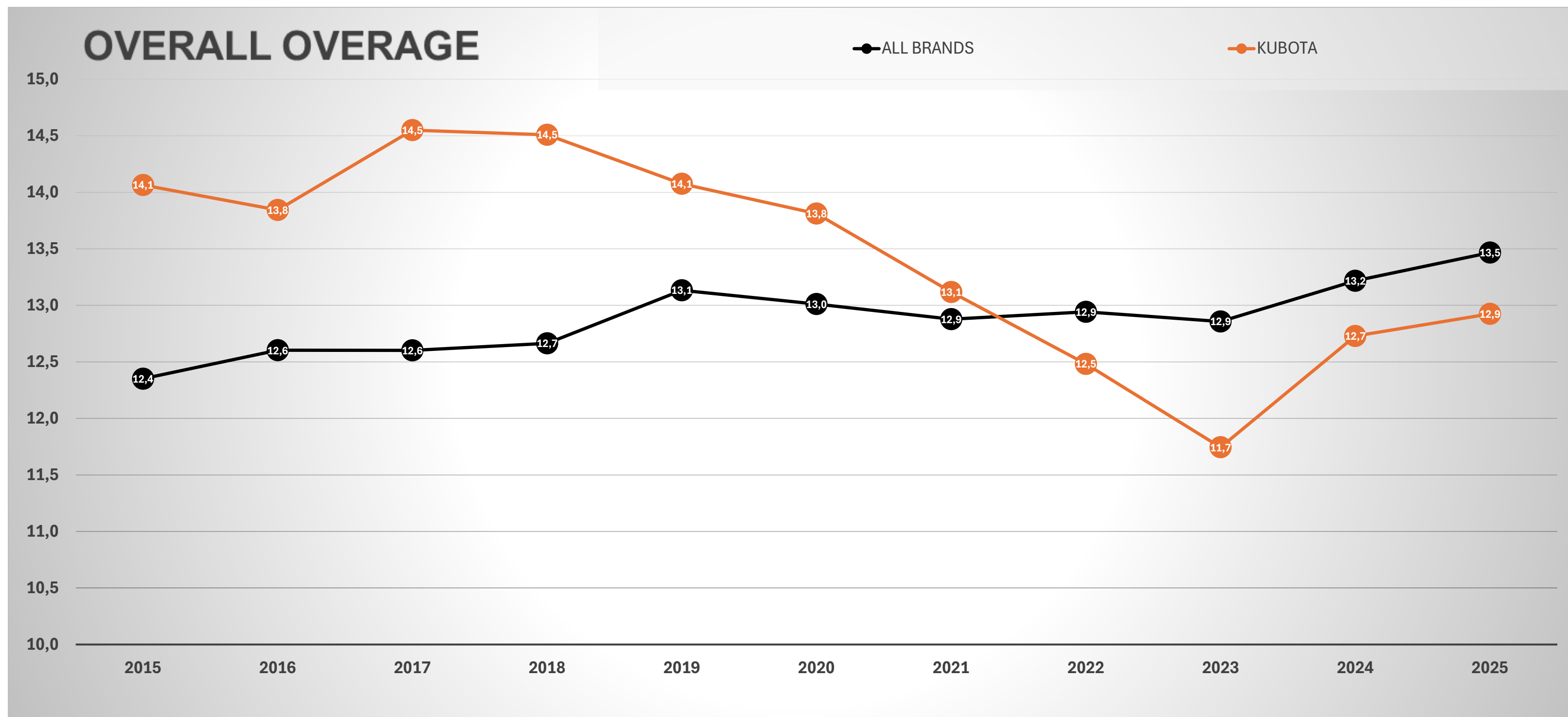
Average 2025: 12,9 (+0,2)



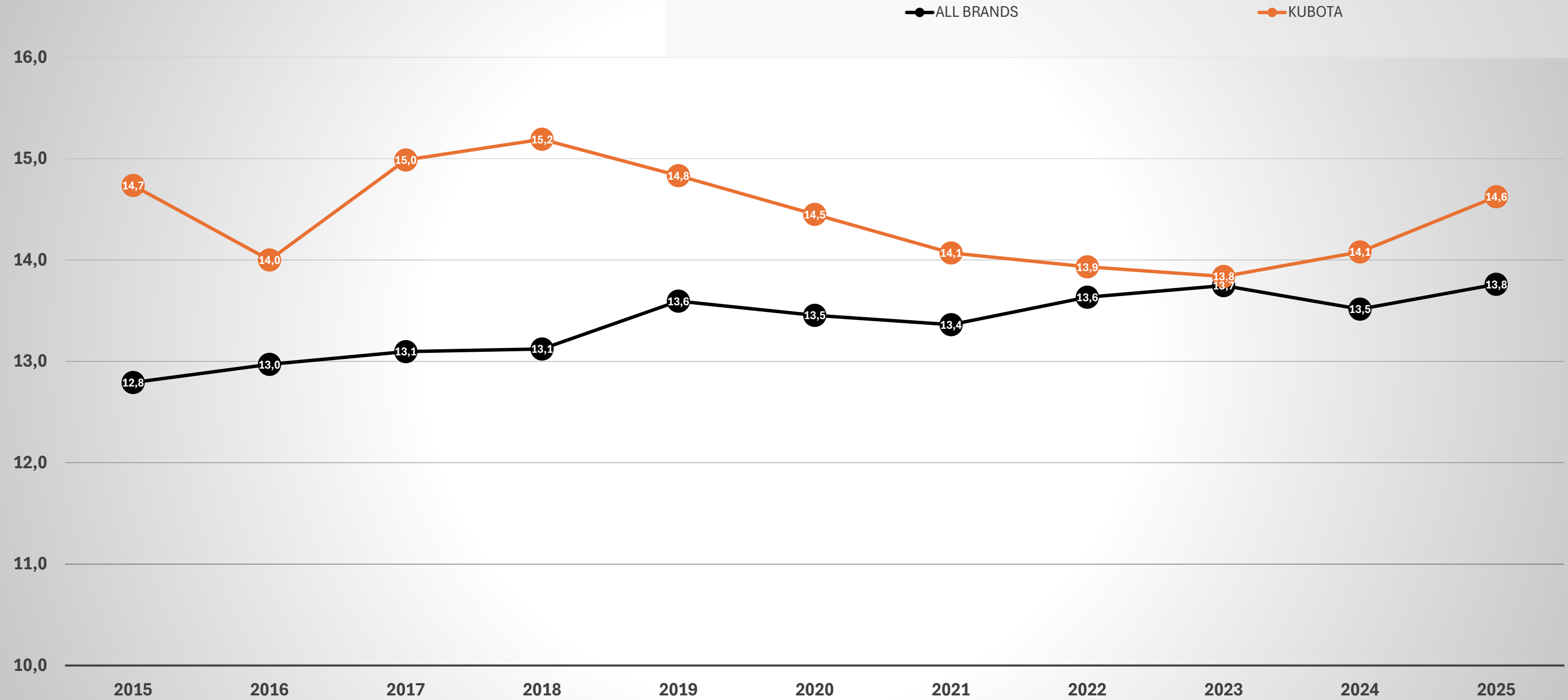


Score 2025 for each heading compared with the overall average for all brands





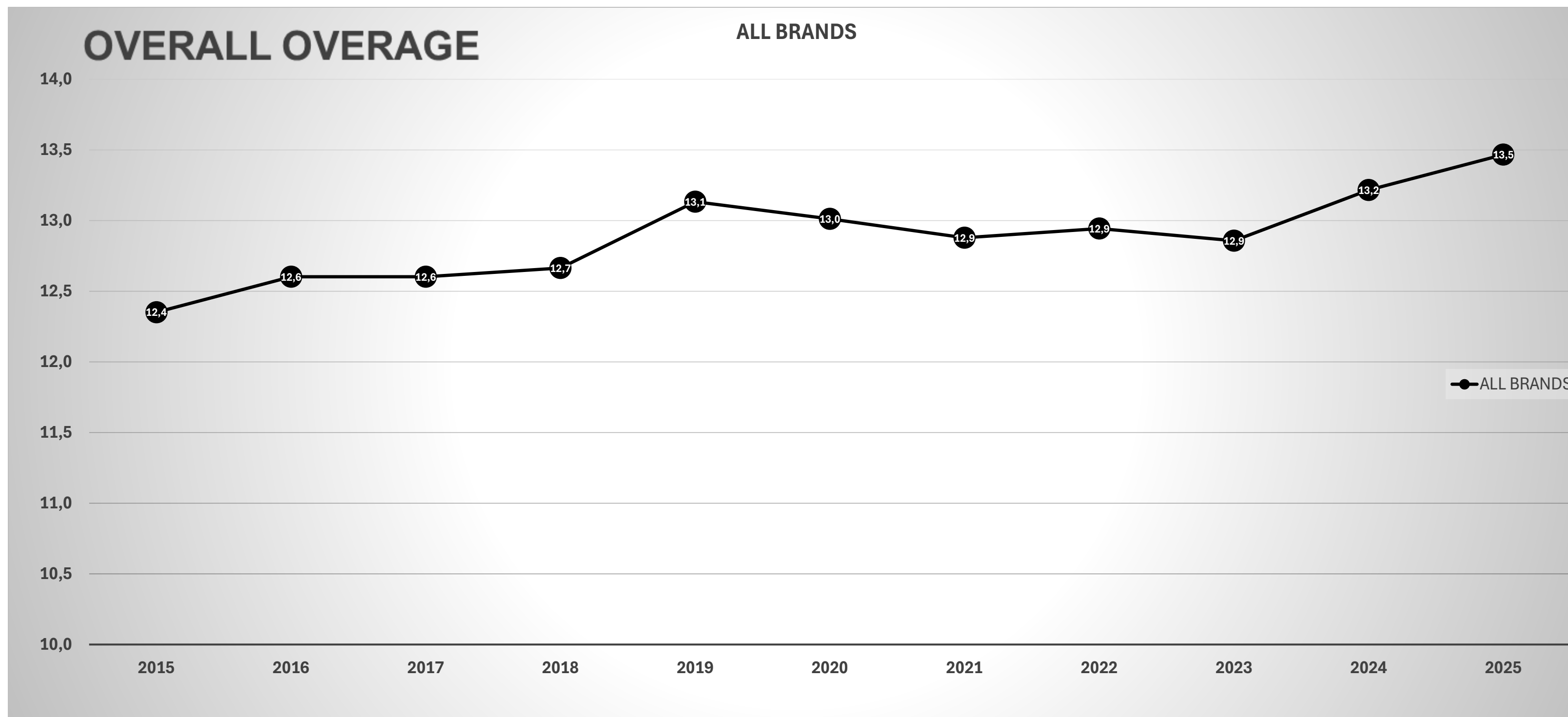
8. TRAINING



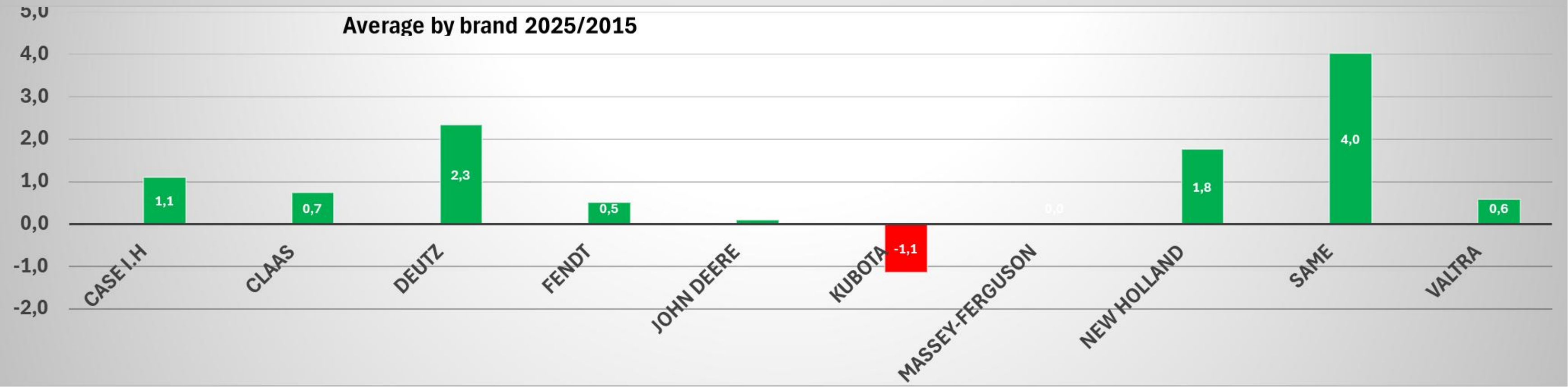
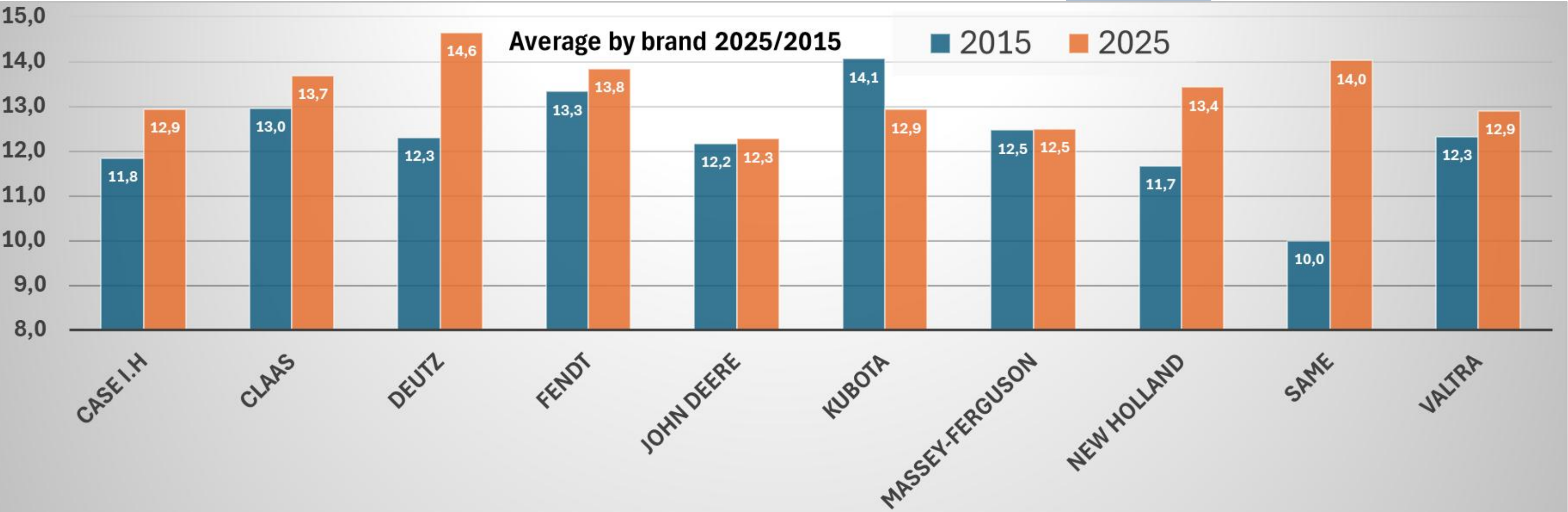
IV. Conclusion



Overview of the 11-years average across all brands



Overview of the 11-years average across all brands

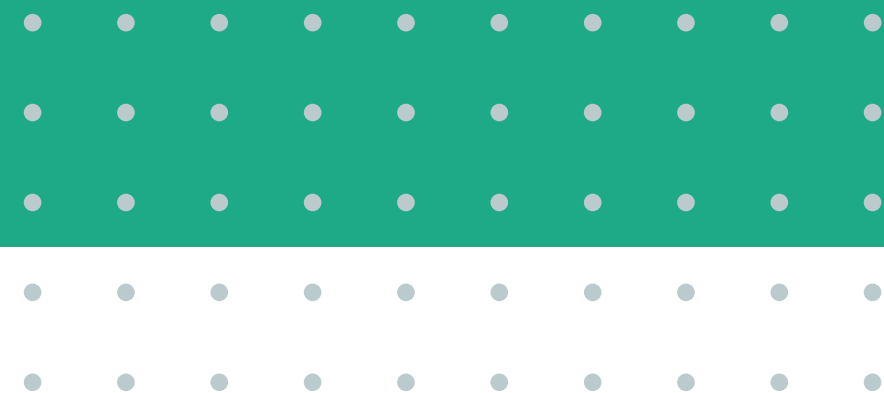


Evolution of the ranking 2025/2015



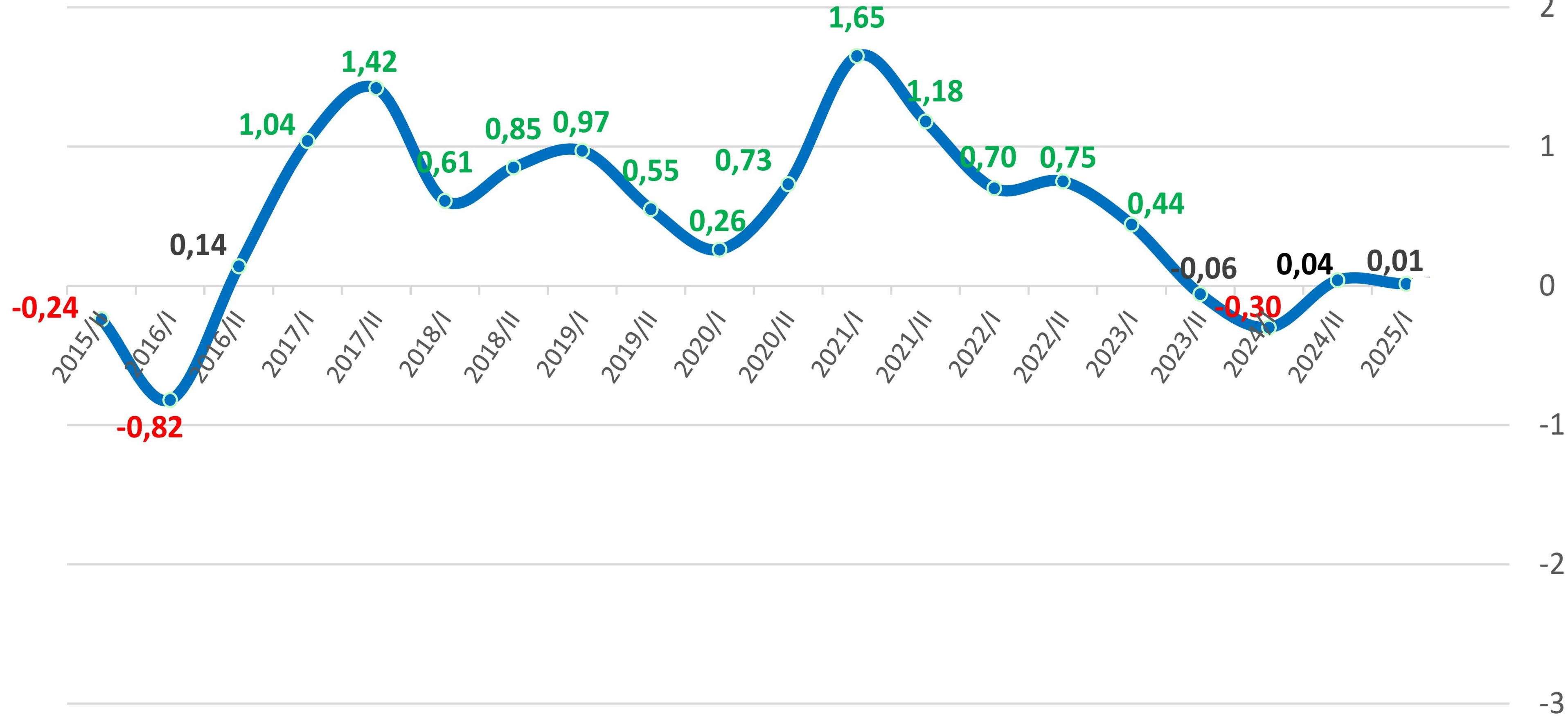
05.

Current Developments



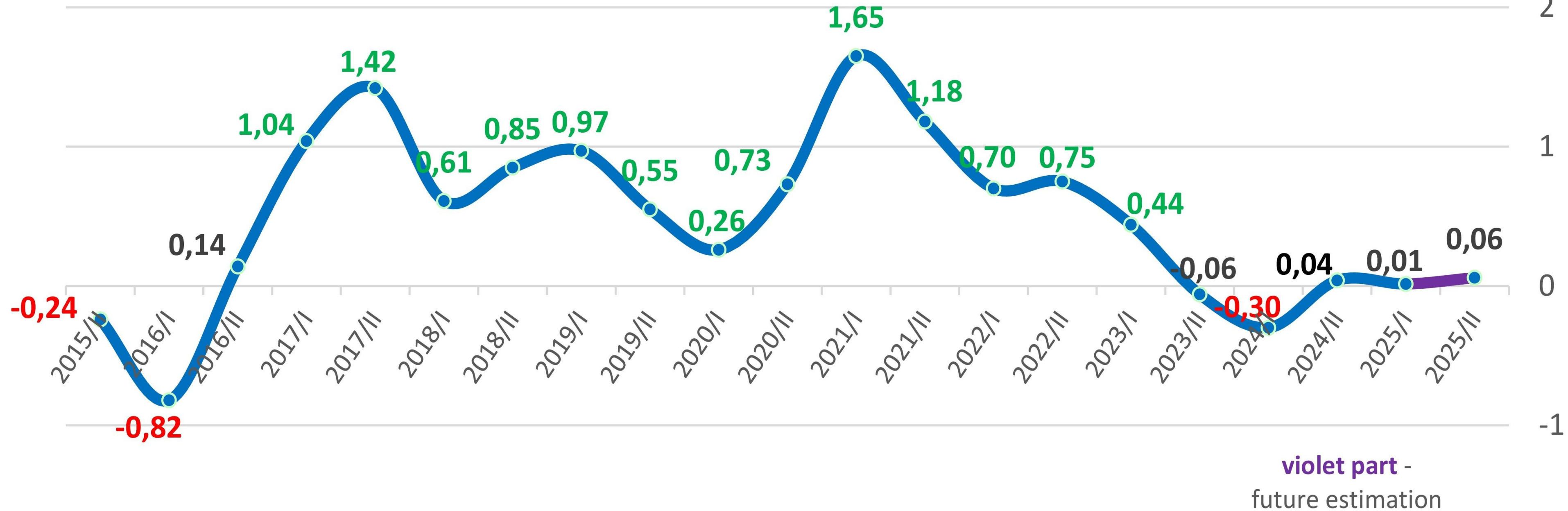
CLIMMAR-Index:

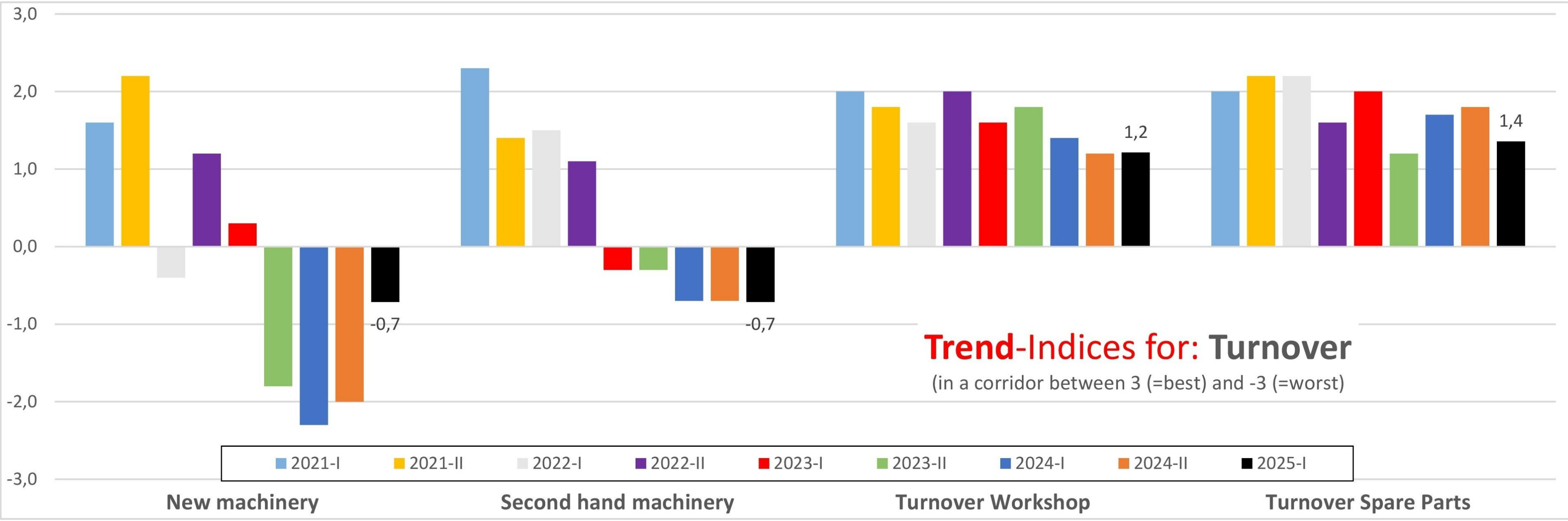
(half-year-trendindex for ag-dealers and -service all over Europe /
halbjähriger Konjunkturwert für Landmaschinenhandel und -service in ganz Europa)



CLIMMAR-Index:

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

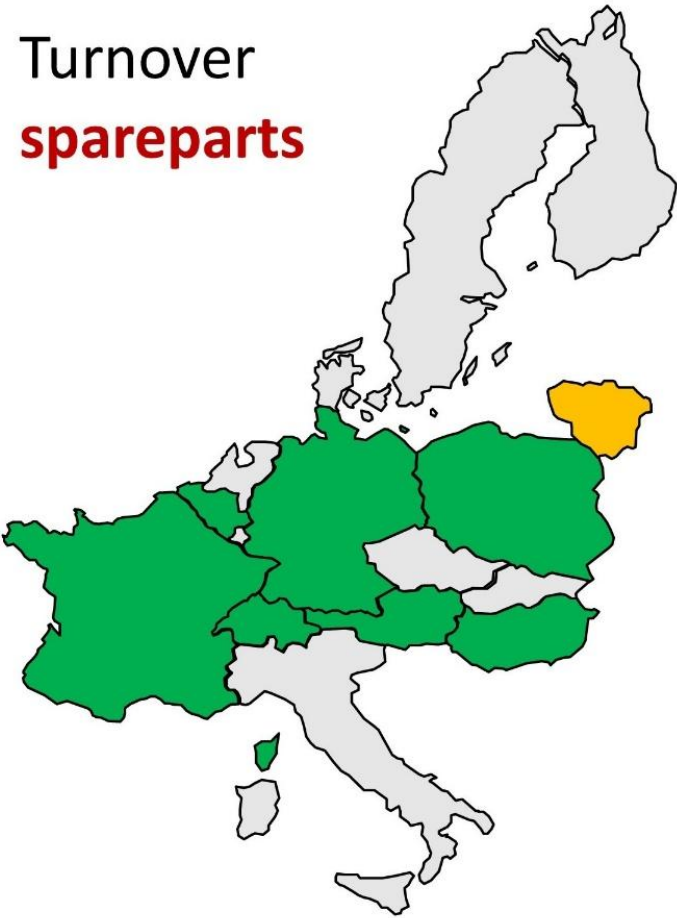
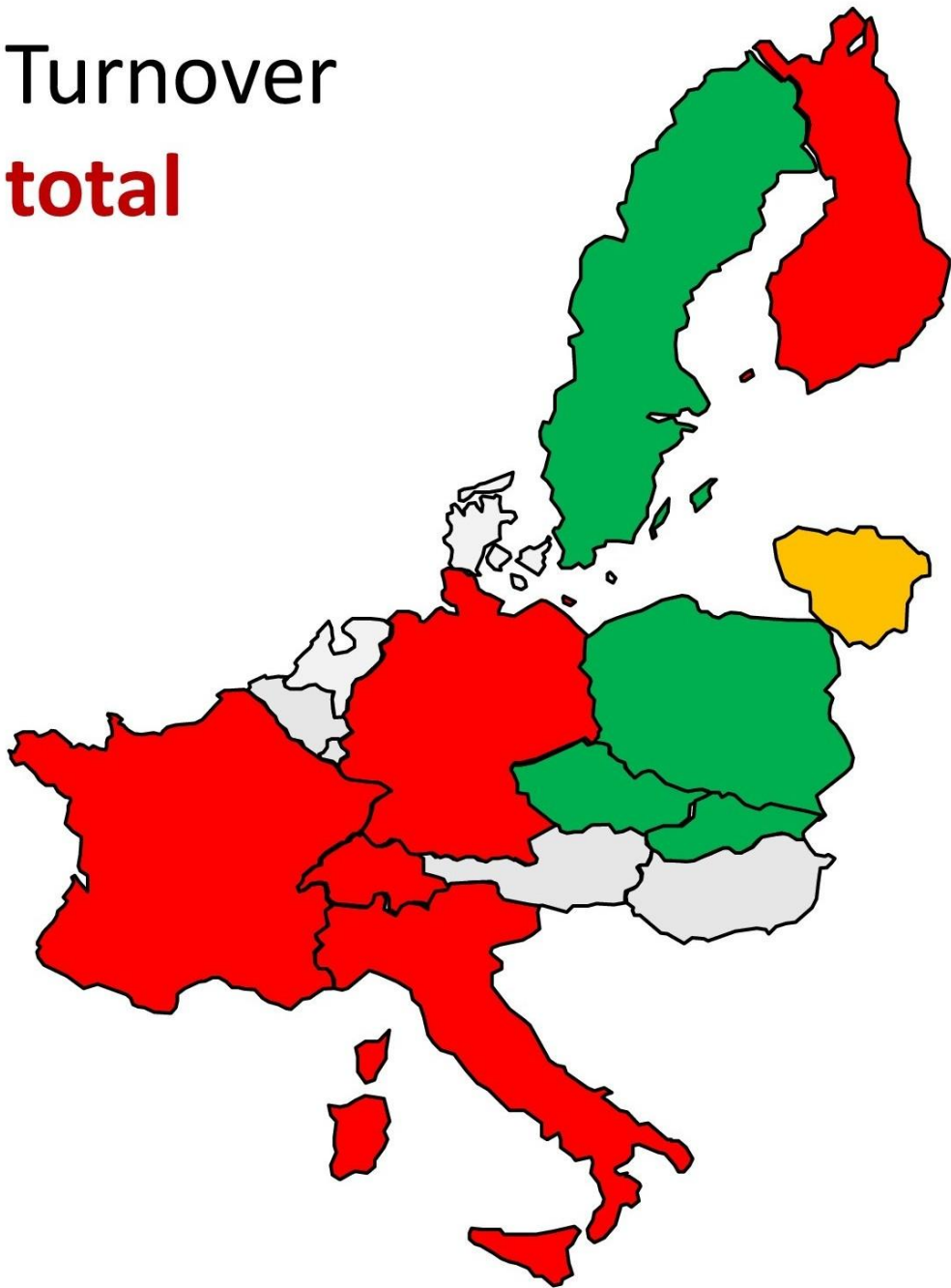




Turnover

development of turnover in the first half of 2025 compared with the same period 2024:

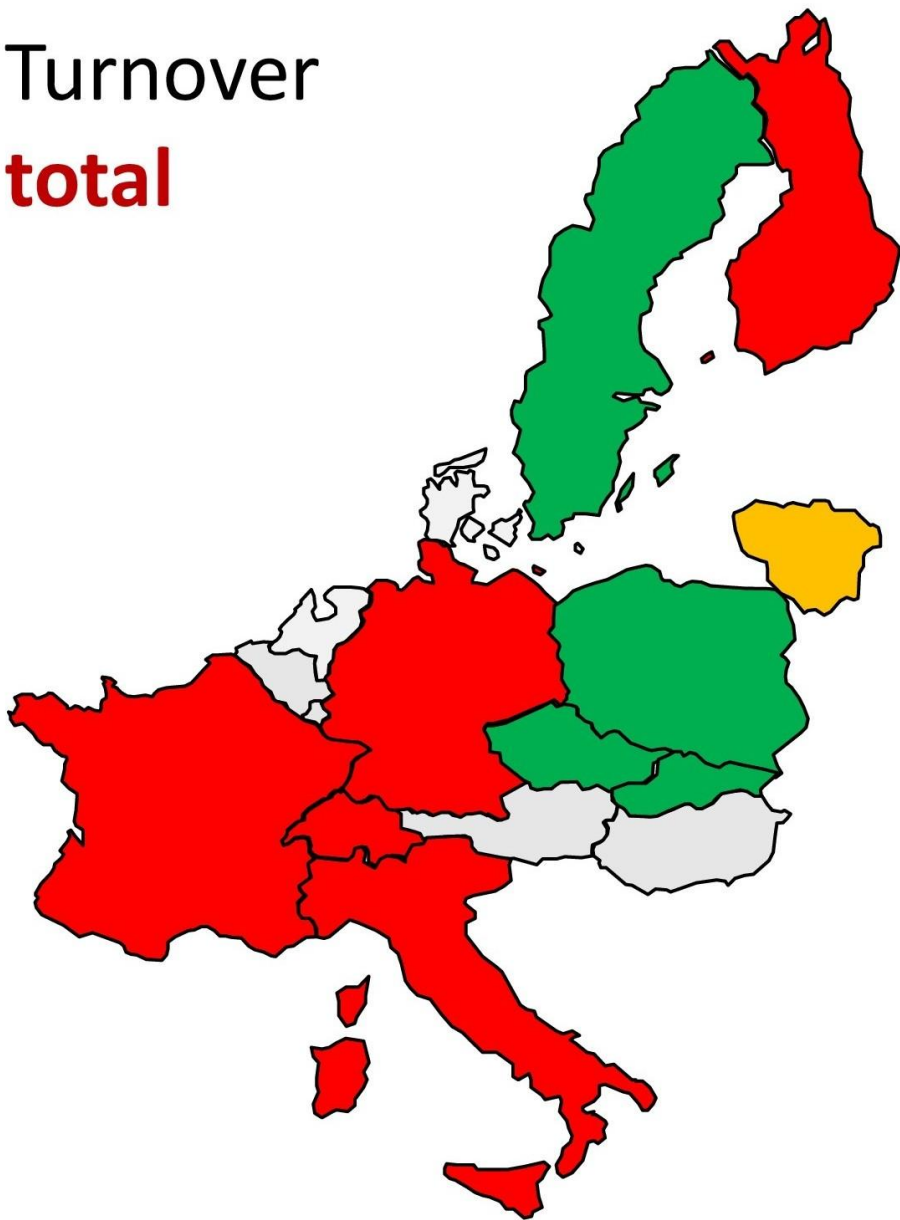
- less / worse / decrease
- equal
- more / growing / increase
- no answer



Development

of turnover in the first half of 2025

Turnover
total

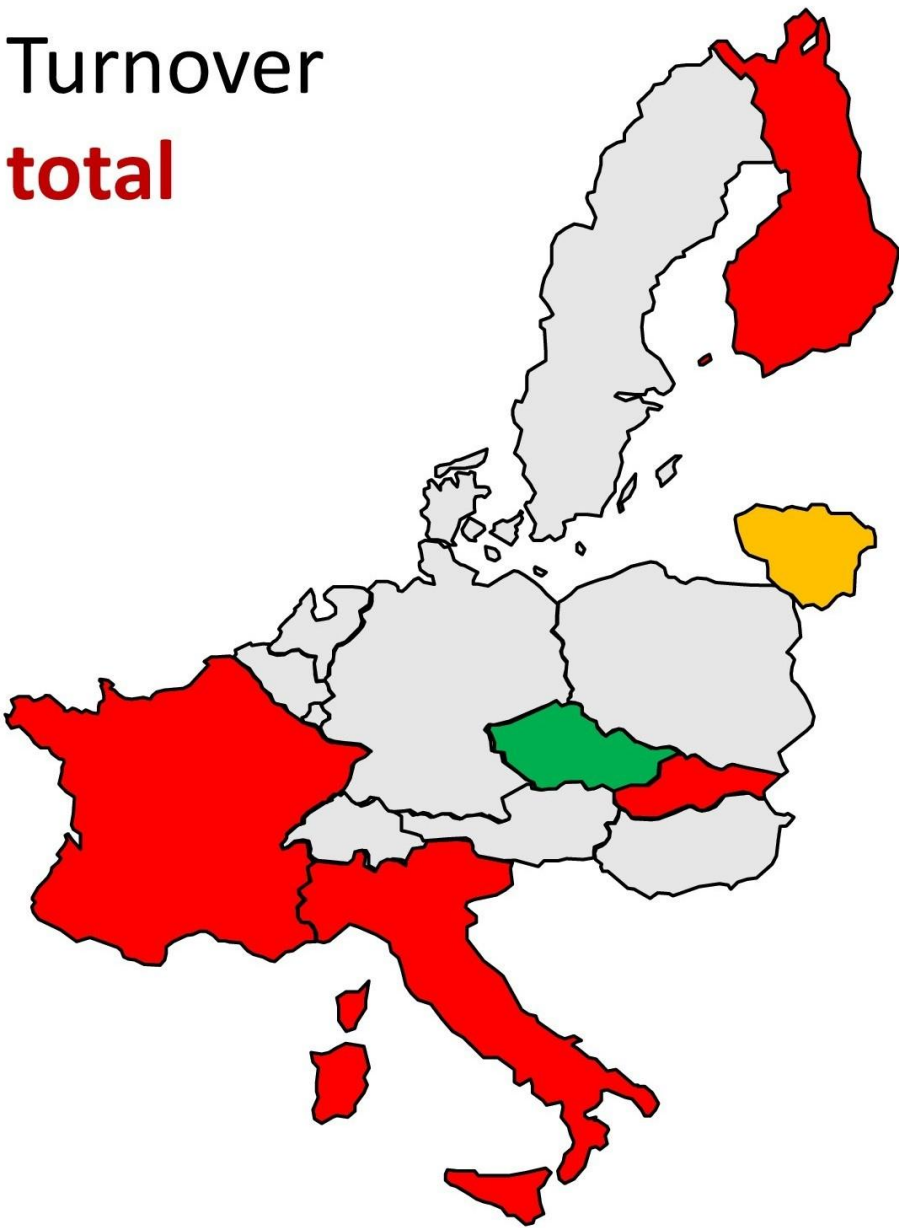


- less / worse /decrease
- equal
- more / growing / increase
- no answer

Expectations

of turnover for next half of 2025

Turnover
total



THANK YOU

Have any question?



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