



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

DSI REPORT

PRESS CONFERENCE EIMA NOVEMBER 7TH

Anne FRADIER - SEDIMA

SUMMARY

I. The scope of the survey

II. What's new in 2024

III. Results 2024 and evolutions

IV. Conclusion

I. The scope of the survey



Reminder about the process



Start : april 4TH 2024
End : May 31th 2024



11
countries
included



Rate of
answer :
33%



Germany



England



Belgium



Denmark



France



Luxembourg



Italy



Hungary



The Netherlands



Poland



Sweden

II. What's new in 2024



List of changes in the 2024 survey

The questionnaire :

15 sections and 73
questions

14 sections and 61
questions in the 2023
survey)



Addition of two new sections on self-propelled vehicles:

- BRAND IMAGE AND IMPACT (self-propelled)
- MARKETING OF SELF-PROPELLED



New questions :

- 2 c. Order modification flexibility
- 5 c. Quality of the manufacturer's configurator
- 6 d. Manufacturer's level of commitment to demo equipment
- 13 d. Level of the cost of financing the overall stock



Deletion of the heading : THEFT PROTECTION

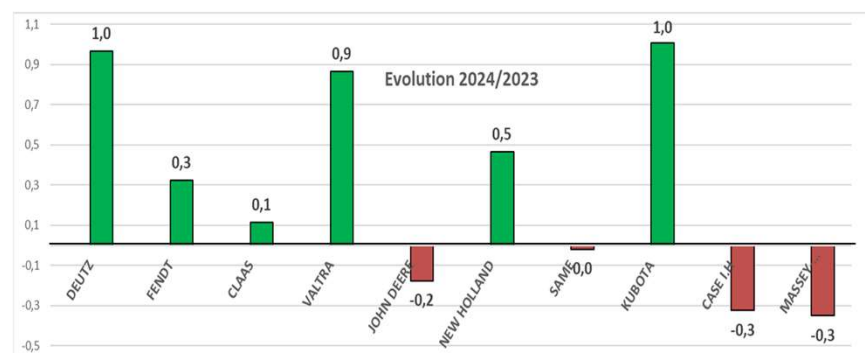
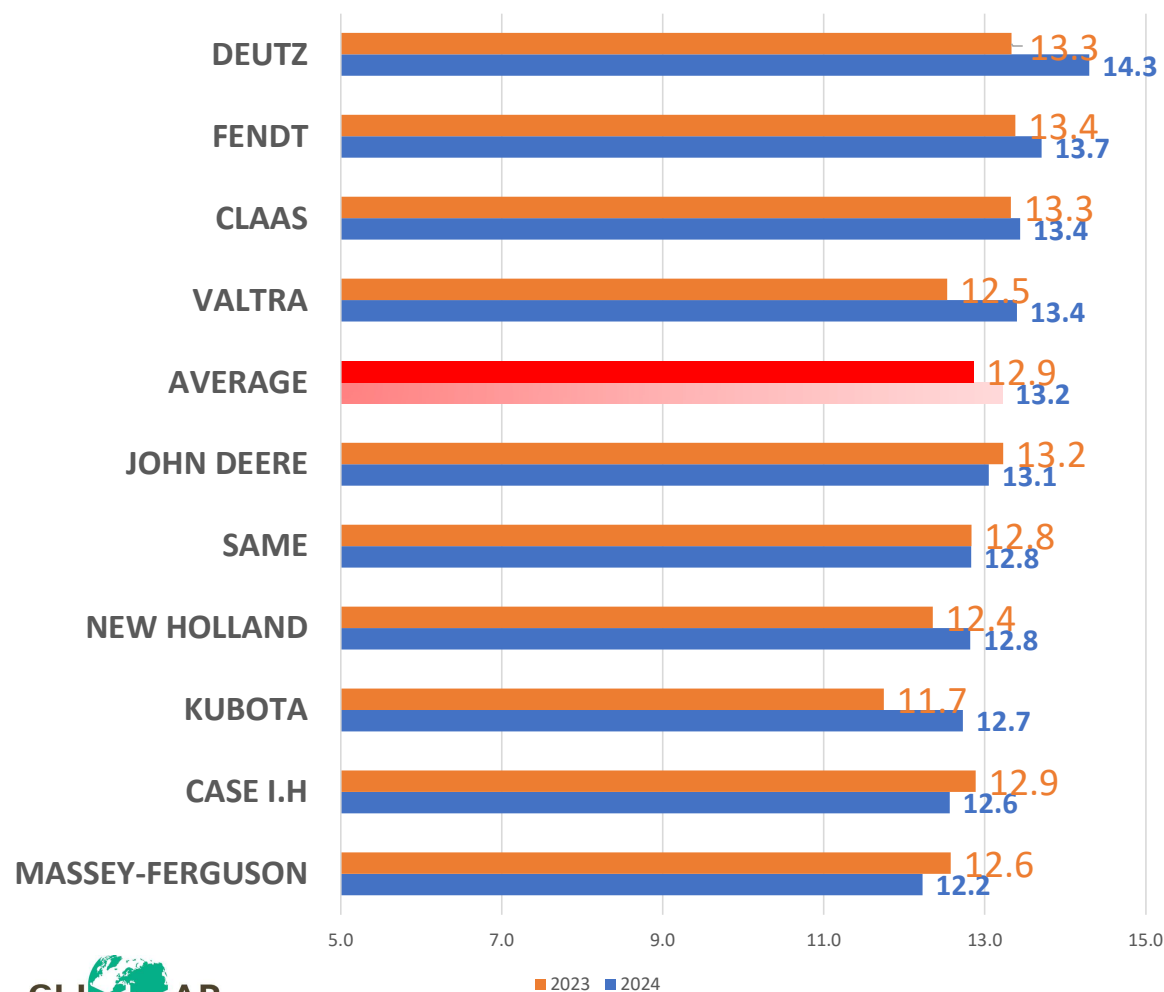


Changes in wording or coding with no impact on results

III. RESULTS 2024 BY BRAND EVOLUTION / 2023



General average by brand 2023 and 2024



BRAND ANALYSIS COMPARED 2024/2023

CASE IH

NEW HOLLAND
AGRICULTURE

CLAAS

FENDT

MASSEY FERGUSON

VALTRA

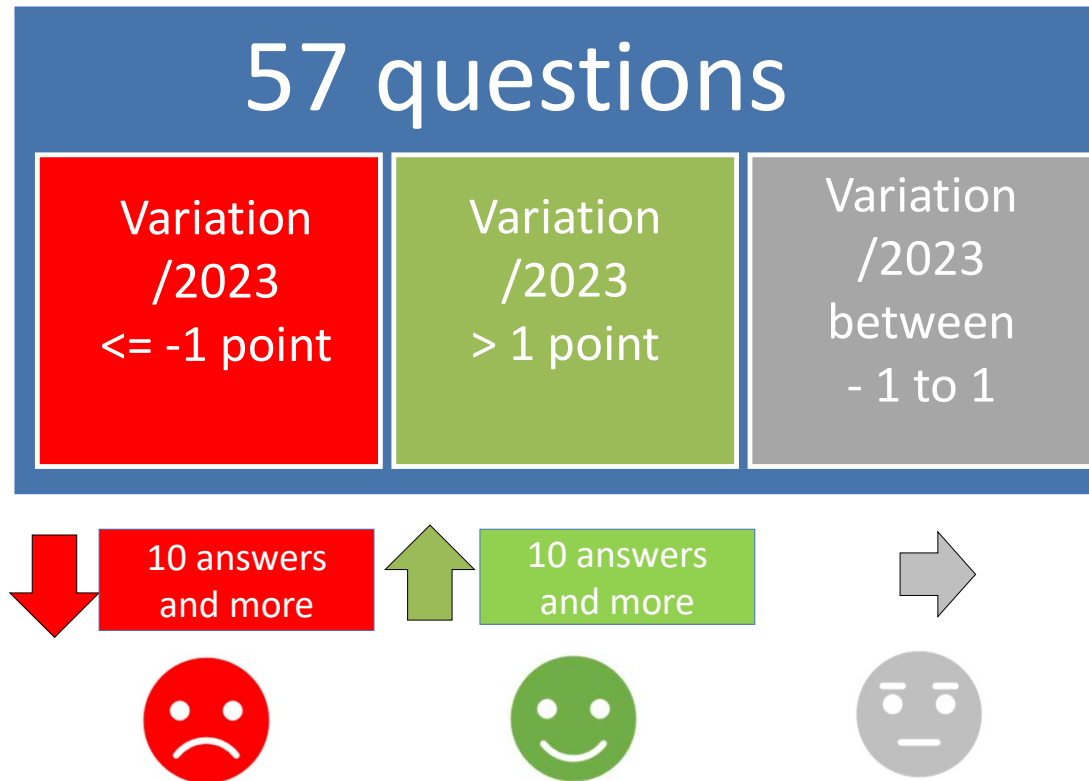
Kubota

DEUTZ **FAHR**

SAME

JOHN DEERE

Legend : reading the diagram for each brand





Average 2024 : 12,6 (-0,3)

12 Q/57

3Q/57

42Q/57



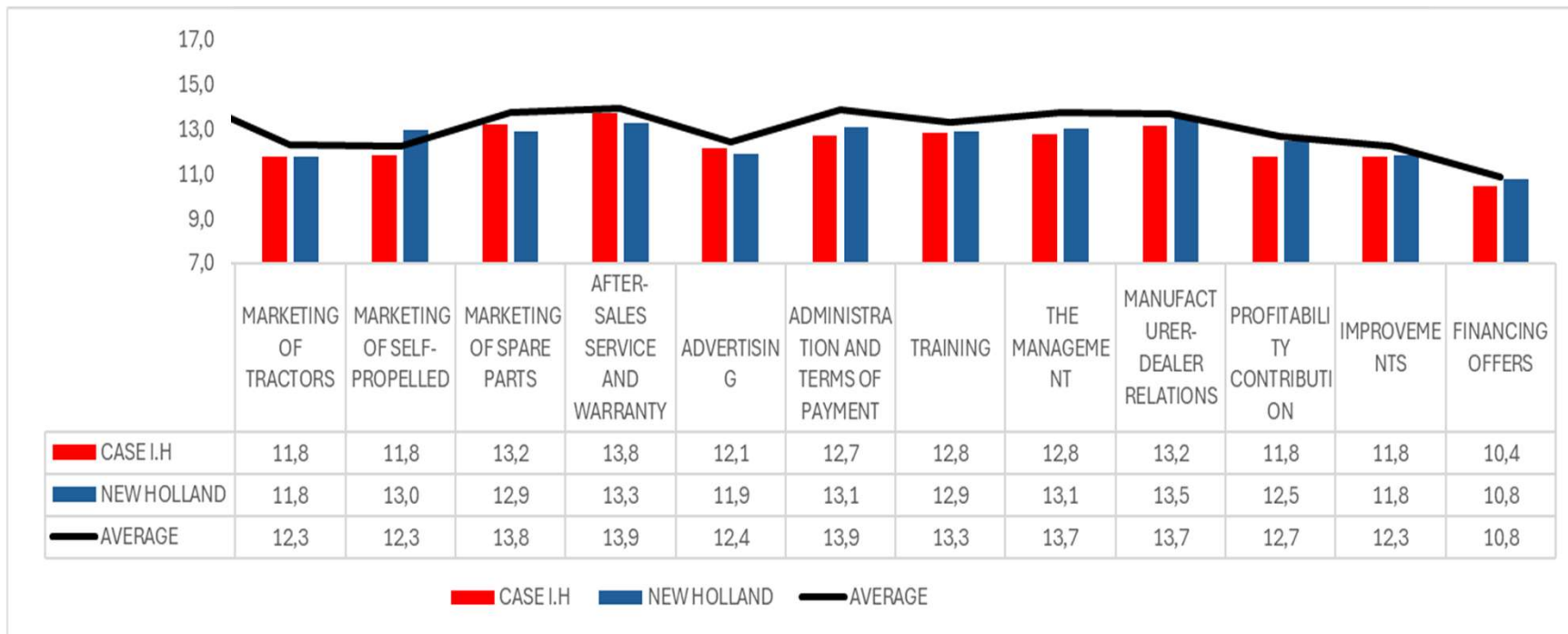
Average 2024 : 12,8 (+0,5)

0Q/57

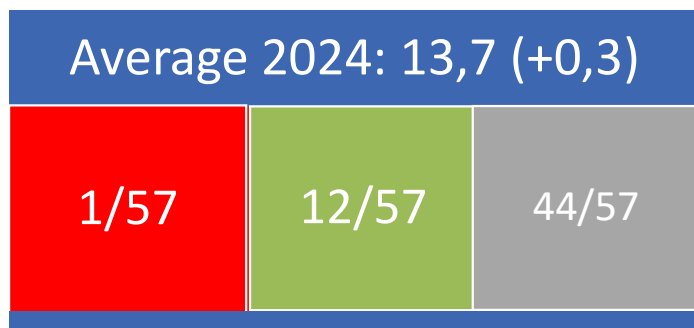
4Q/57

53Q/57

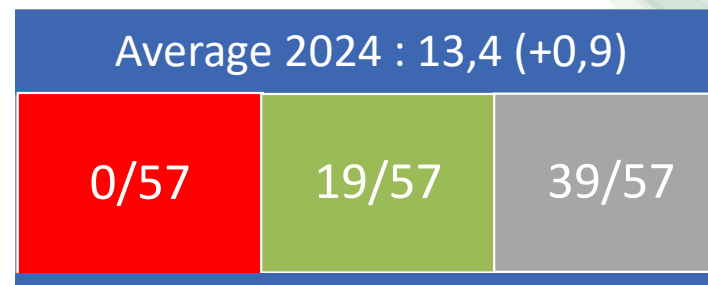
Score 2024 for each heading compared with the overall average for all brands



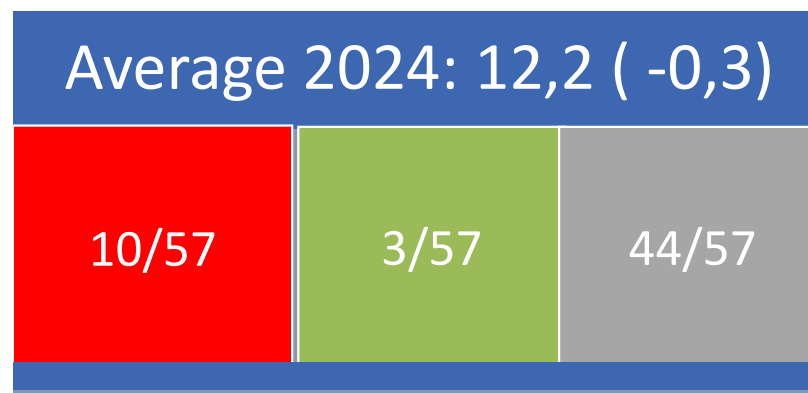
FENDT



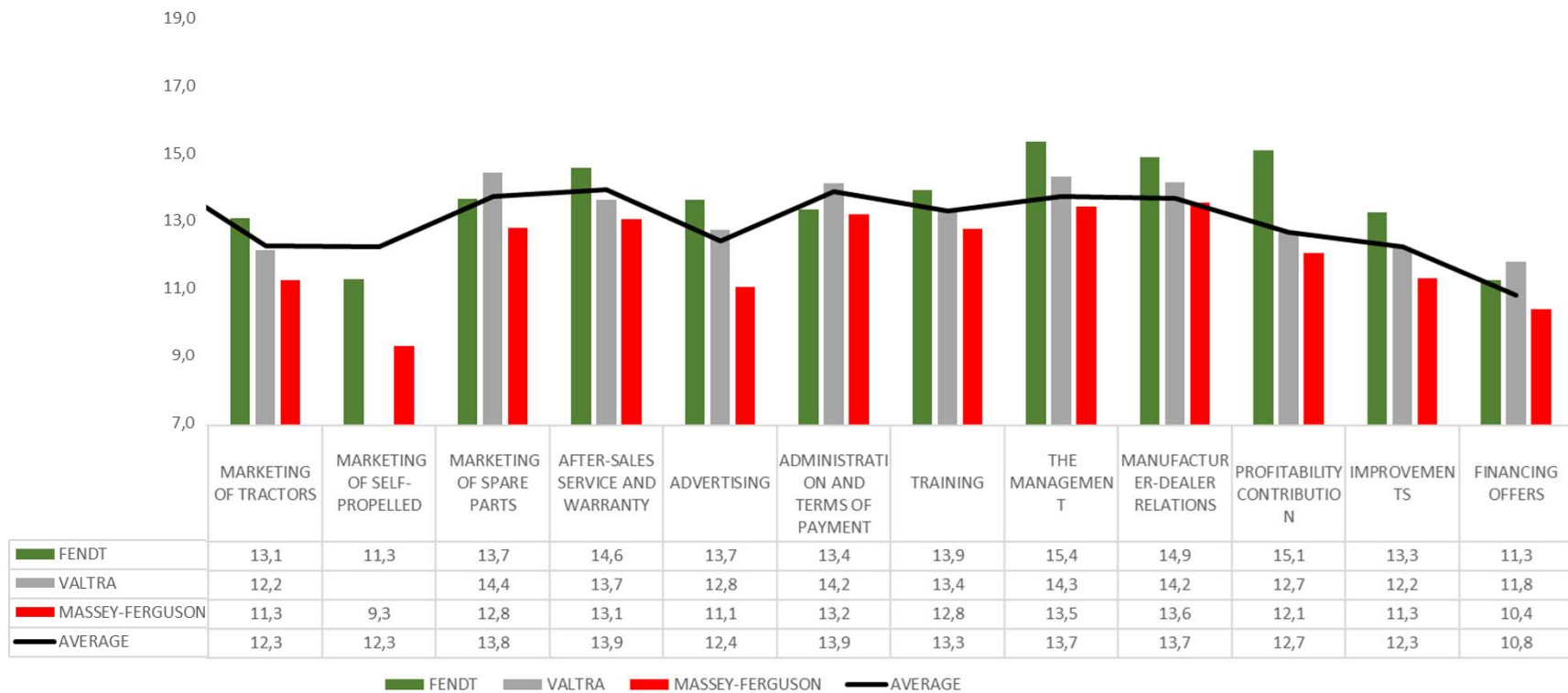
VALTRA



MASSEY FERGUSON



Score 2024 for each heading compared with the overall average for all brands





Average 2024 : 14,3 (+1)

0/57

20/57

37/57



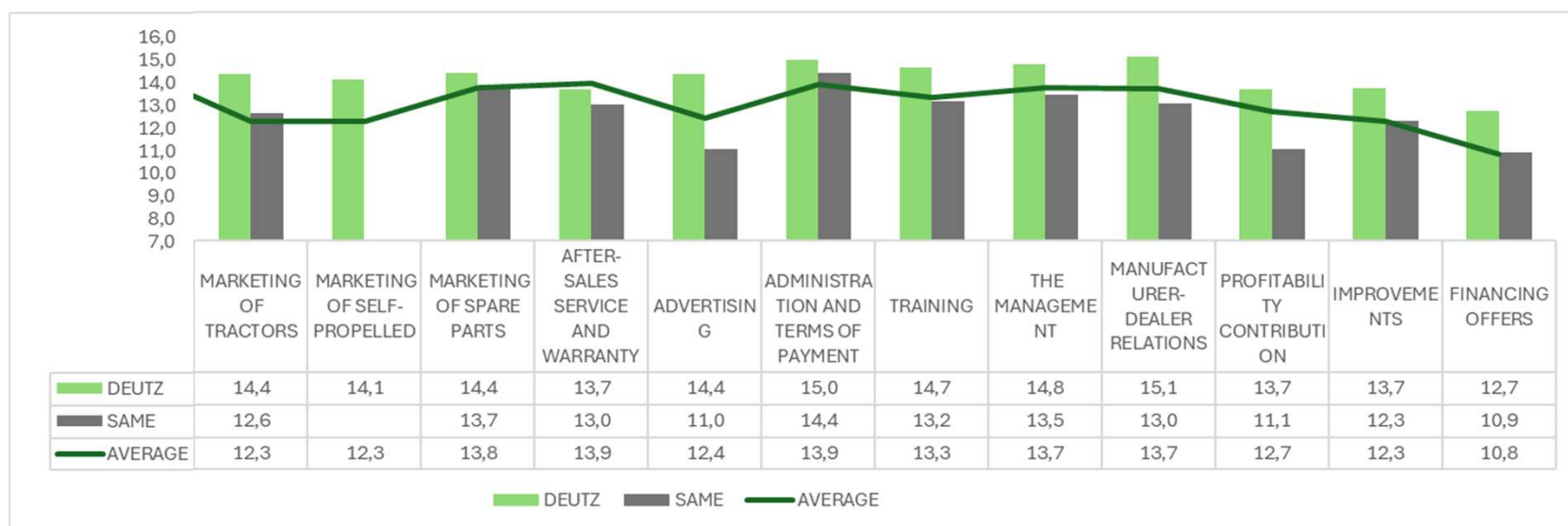
Average 2024 : 12,8 (=)

7/57

4/57

46/57

Score 2024 for each heading compared with the overall average for all brands





General average 2024: 13,4 (/2023 +0,1)



10/57

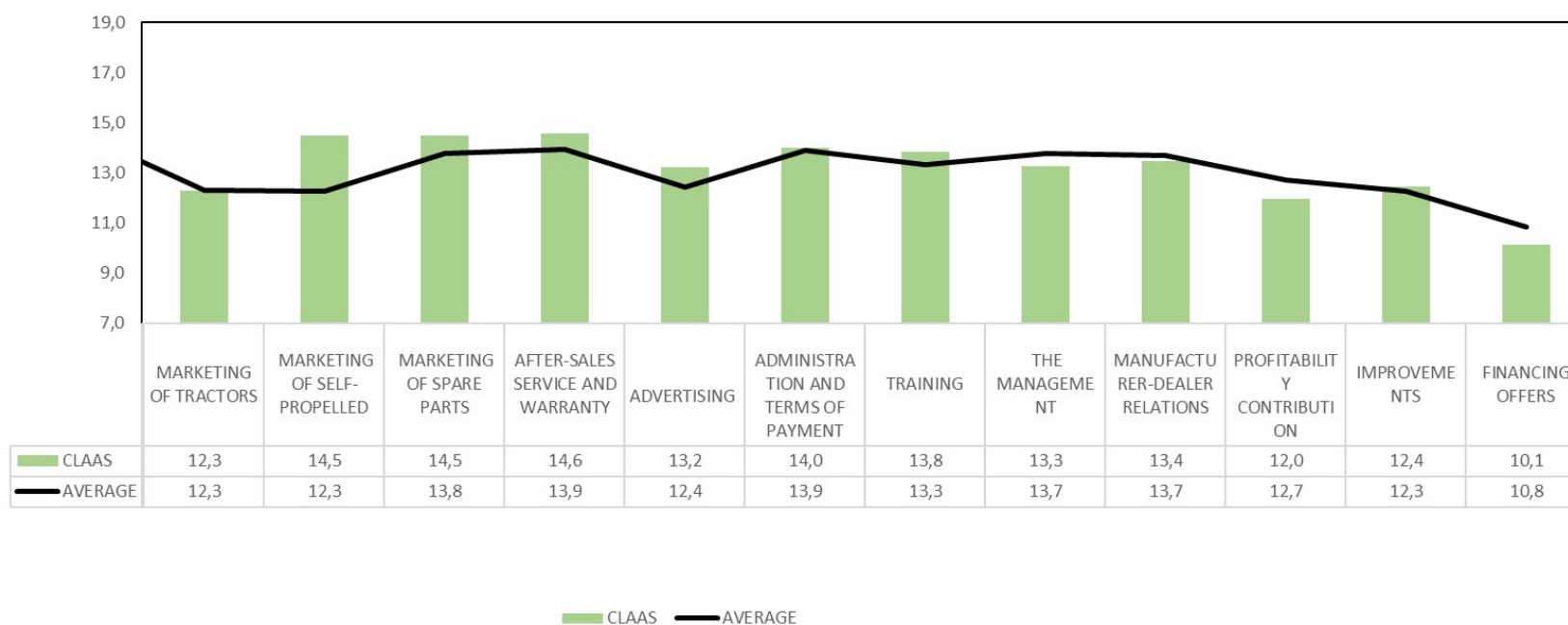


4/57



43/57

Score 2024 for each heading compared with the overall average for all brands





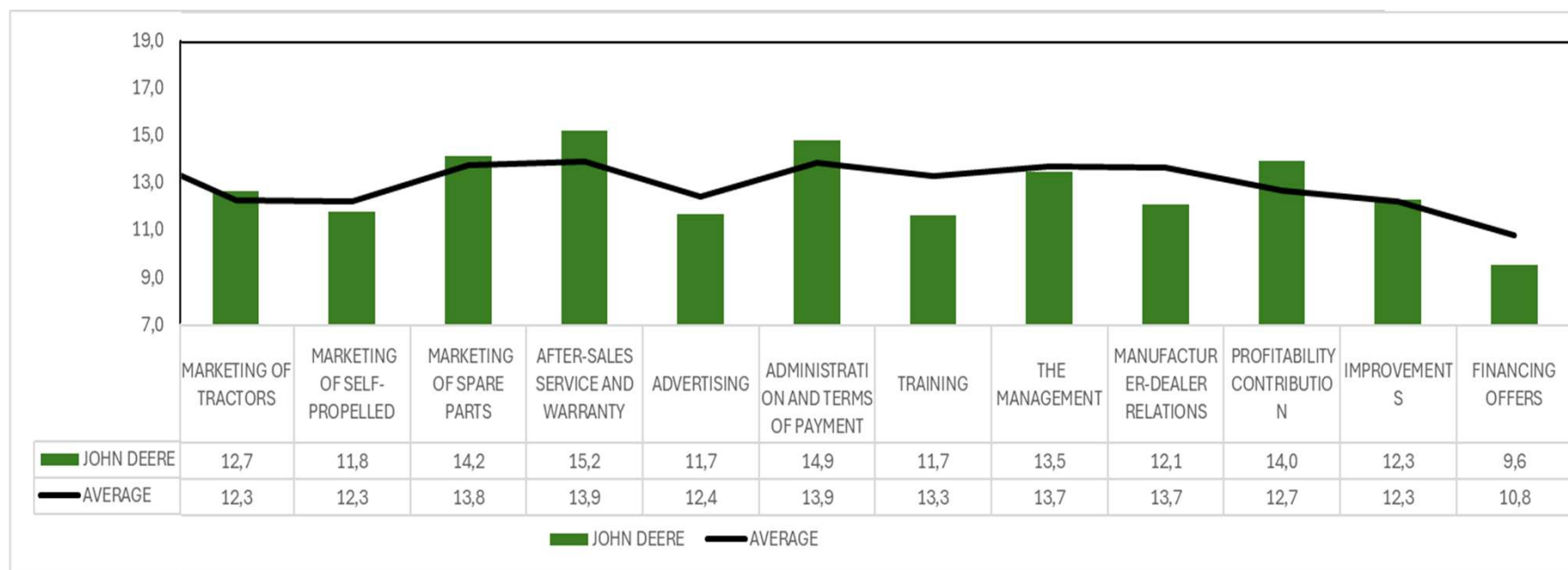
Average 2024: 13,1 (-0,2)

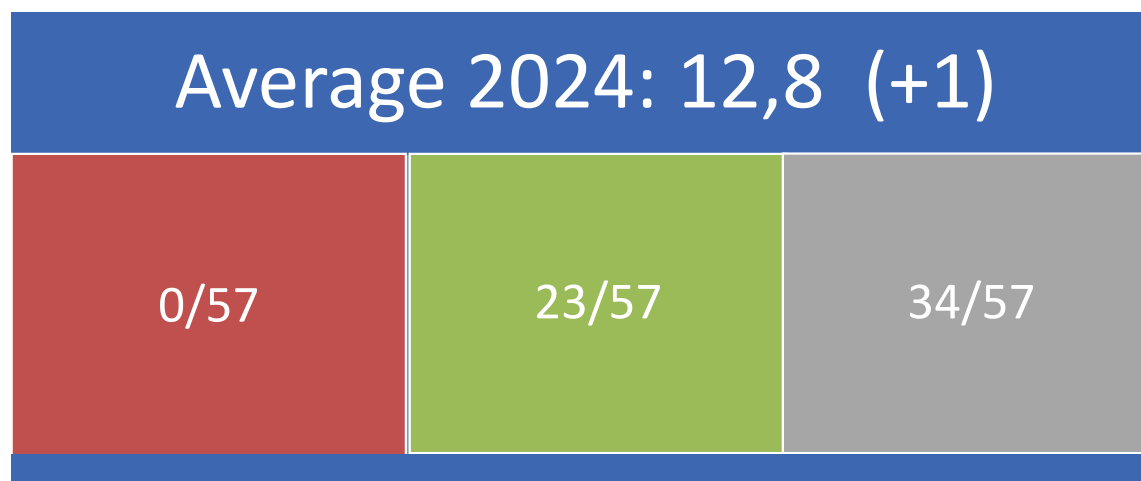
16/57

6/57

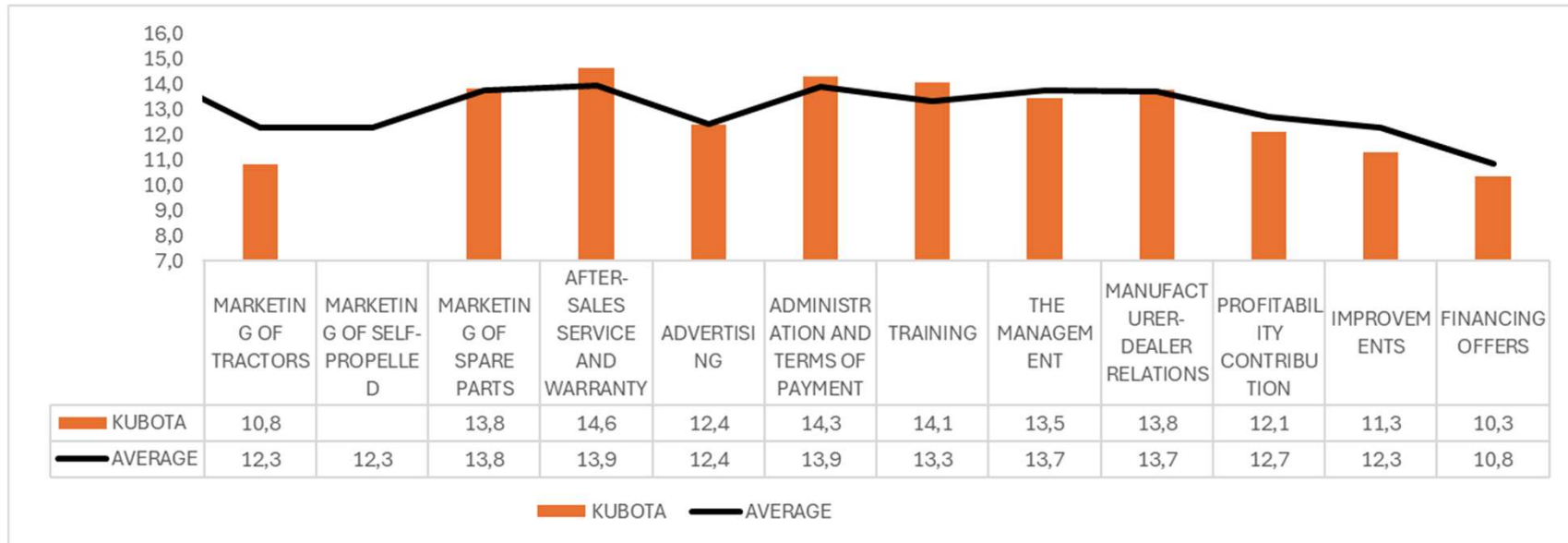
35/57

Score 2024 for each heading compared with the overall average for all brands





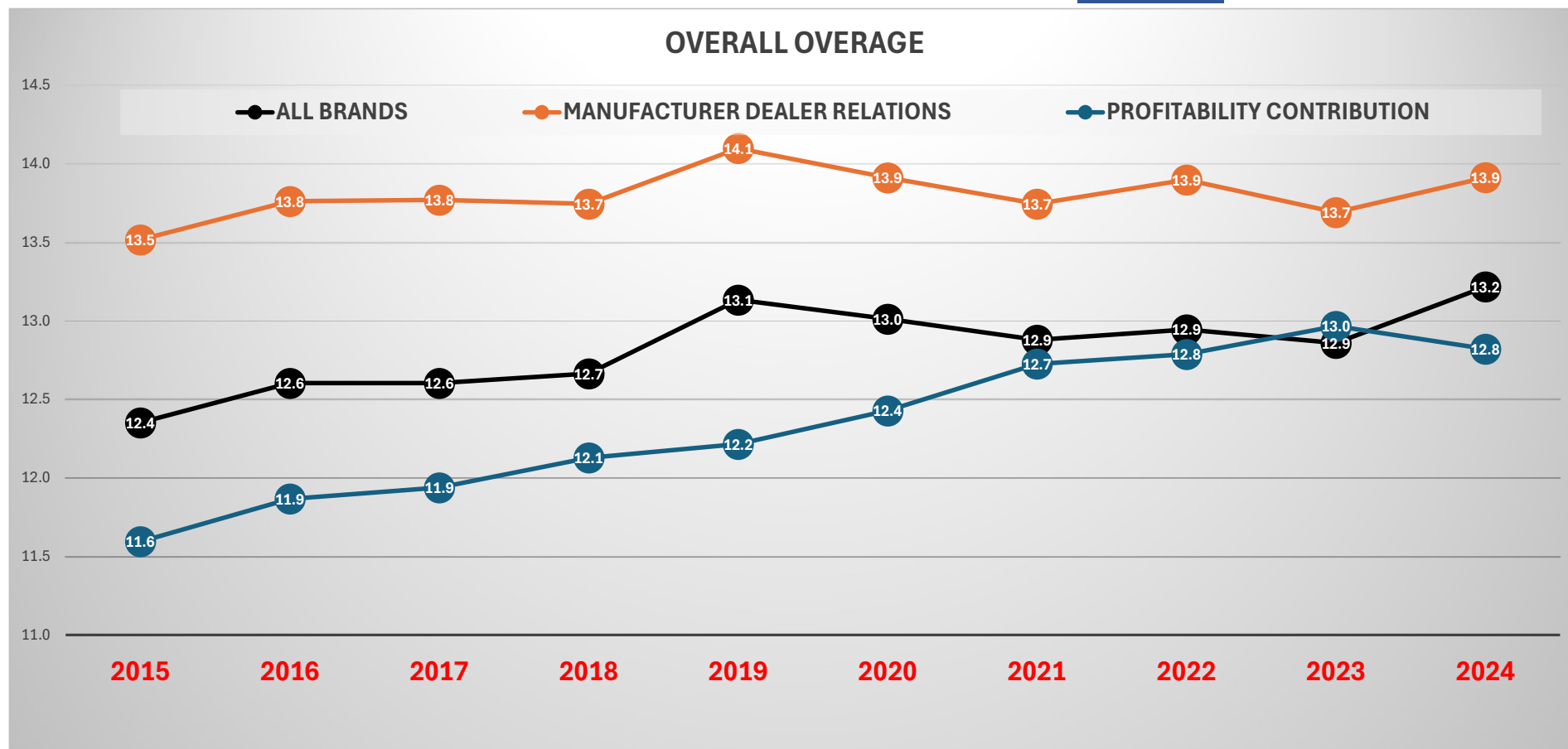
Score 2024 for each heading compared with the overall average for all brands



IV. Conclusion

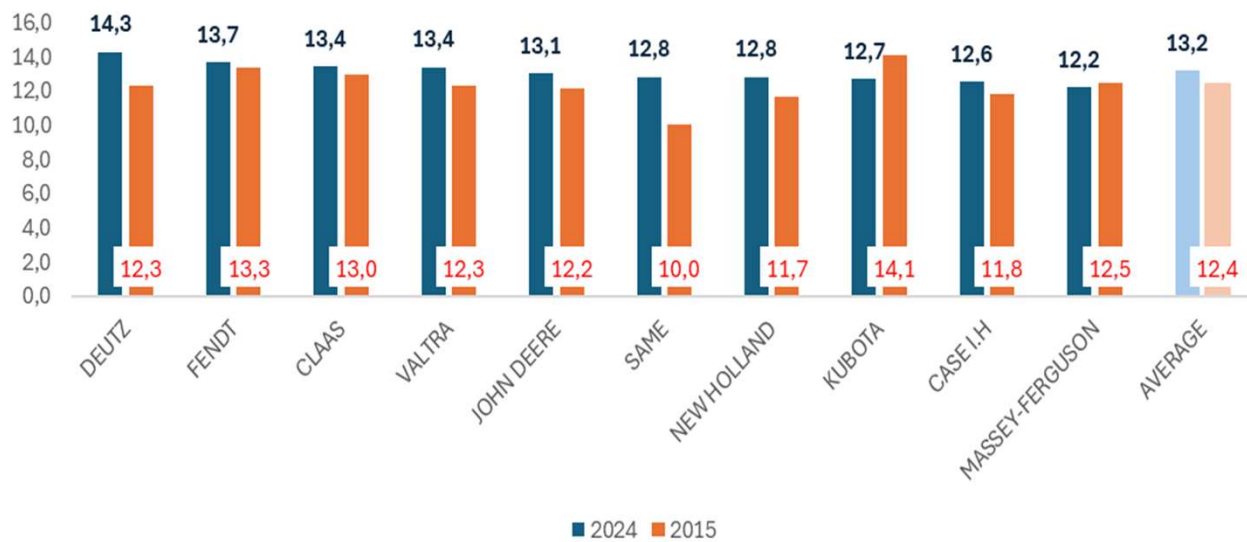


Overview of the 10-years average across all brands

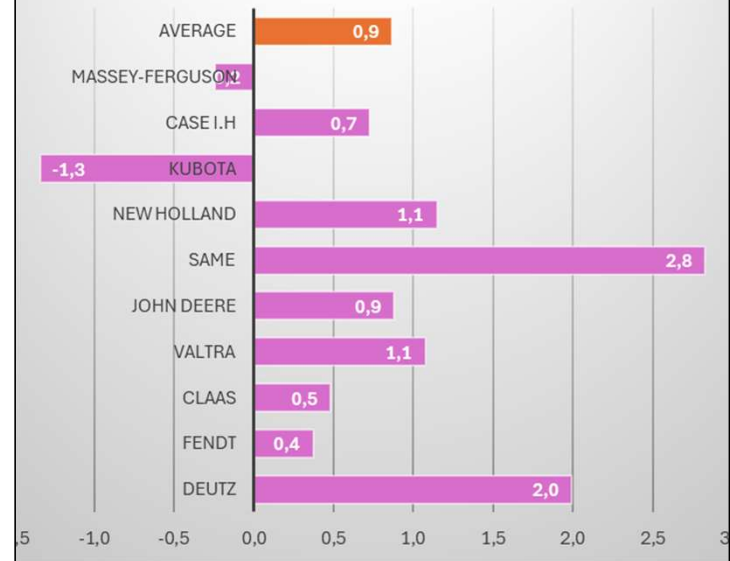


Overview of the 10-years average across all brands

Average by brand 2024/2015



Difference between the average 2024 /2015



Thank you for your attention