CLIMMAR

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

TABLE OF CONTENT

01. Who we are

02. Who are our members

03. Branch Structure

04. Dealer Satisfaction Index

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



OUR Reports

Dealer Satisfaction Index

Survey of dealers' satisfaction development with suppliers.

Branch Report

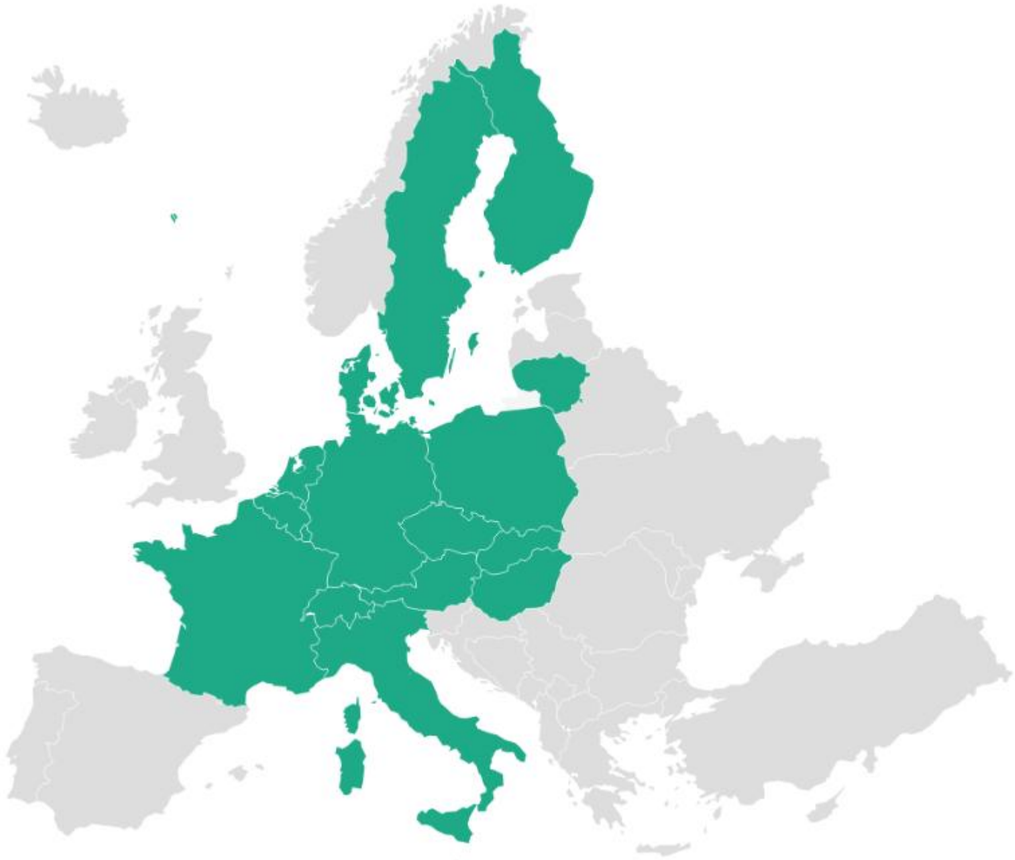
Provides data and statistics from CLIMMAR members on business performance and expectations.

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.

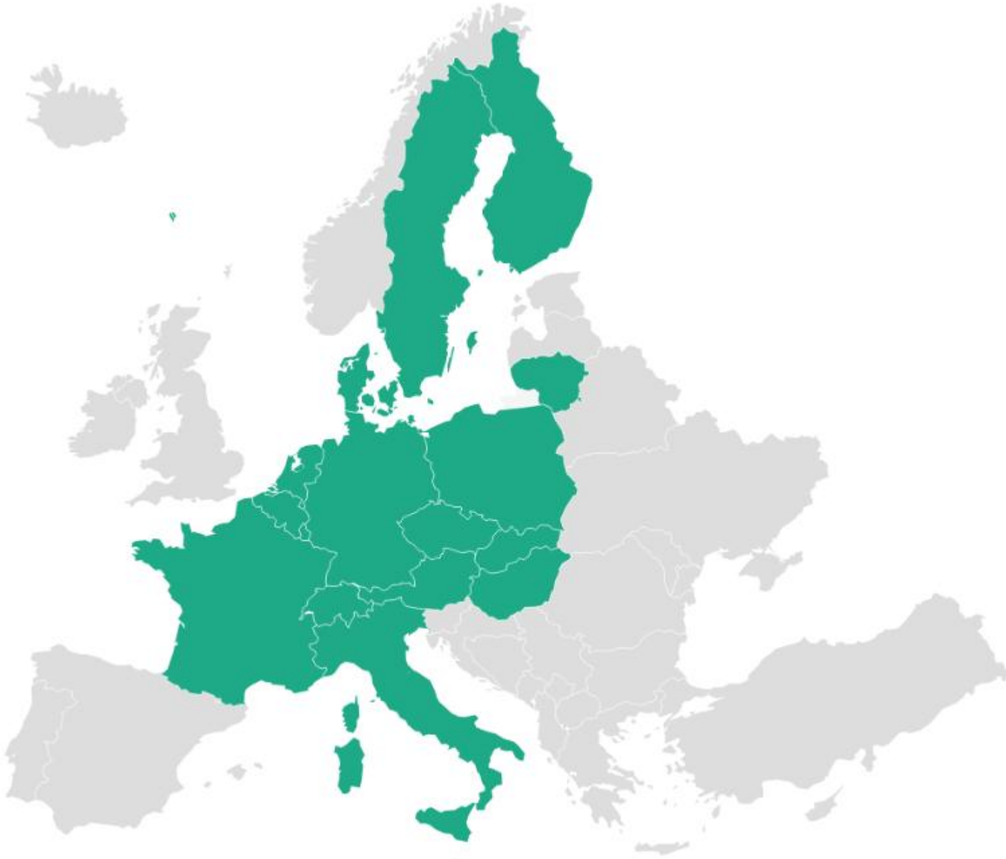


03.

Branch Structure

Branch Structure

Dealers:	15.197
Employees:	186.935
Apprentices:	22.527 *
Turnover:	48.955 Mio. €
Tractor sales:	111.902



* without Poland and Sweden

Branch Structure

Turnover per company: 3,221,000 €

Employees per company: 12,3

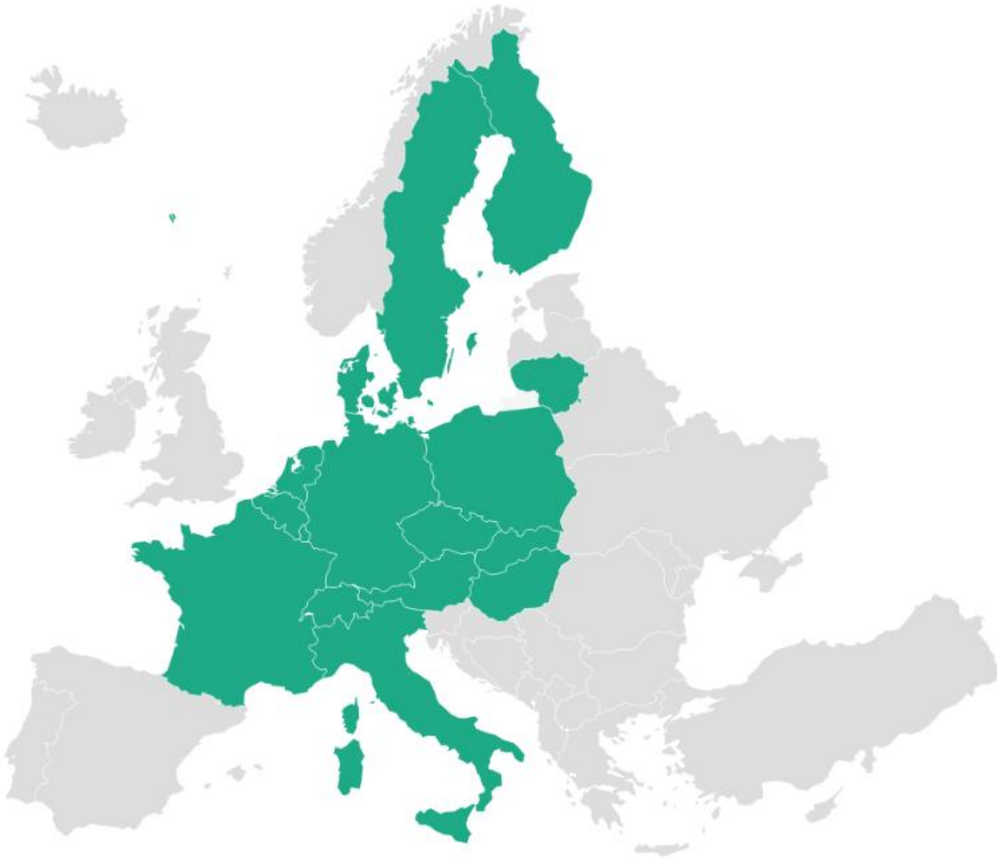
Turnover per employee: 262.000 €

Apprentices per company: 1,7*

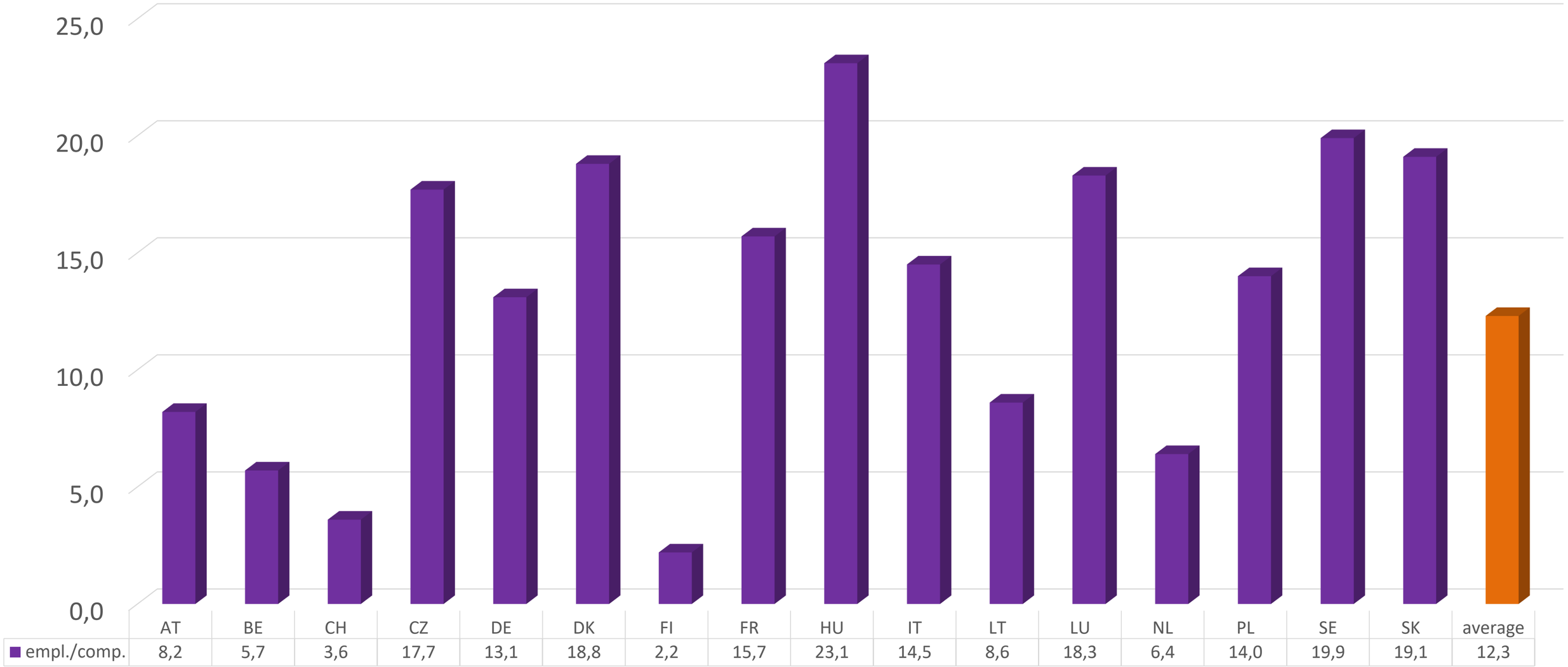
Tractor sales per company: 7,4

Tractor sales >50 hp per company: 5,6

* without Poland and Sweden

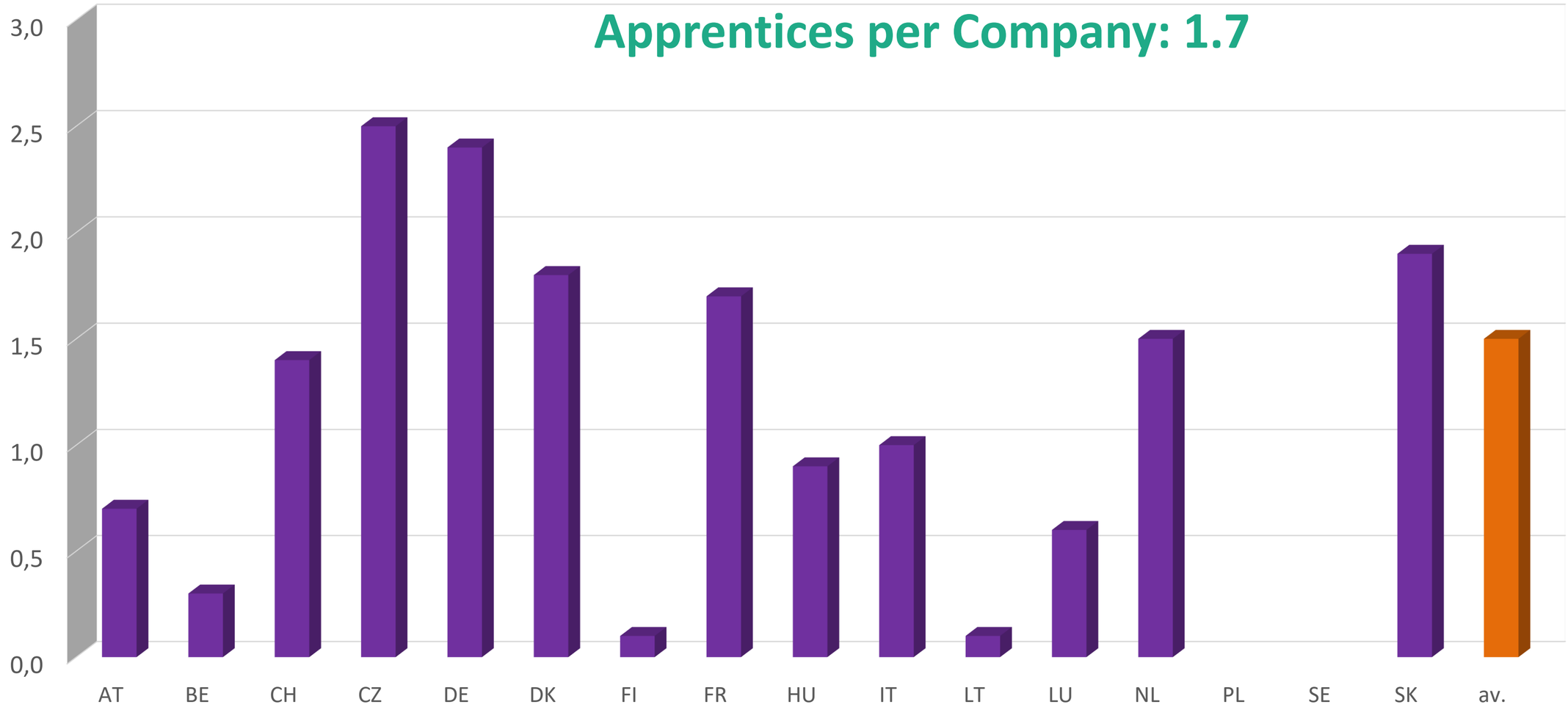


Relations - Employees per Company: 12.3



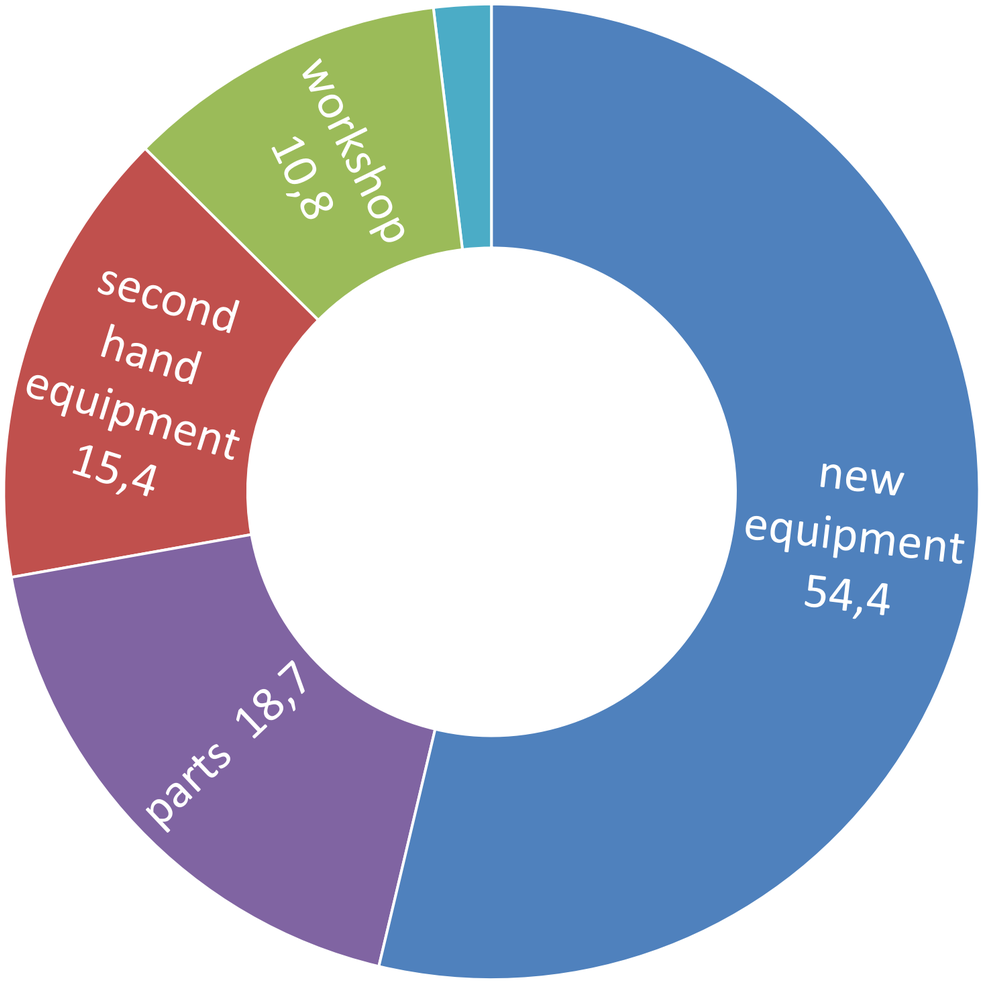
	AT	BE	CH	CZ	DE	DK	FI	FR	HU	IT	LT	LU	NL	PL	SE	SK	average
empl./comp.	8,2	5,7	3,6	17,7	13,1	18,8	2,2	15,7	23,1	14,5	8,6	18,3	6,4	14,0	19,9	19,1	12,3

Relations –
Apprentices per Company: 1.7

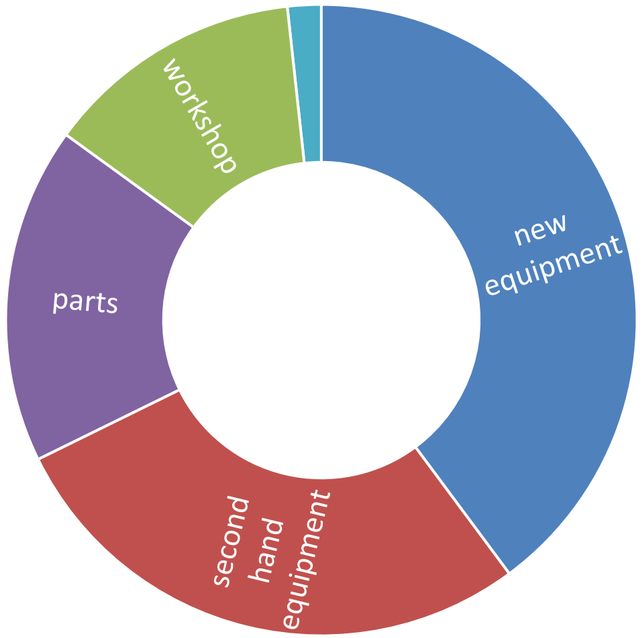


Source: CLIMMAR

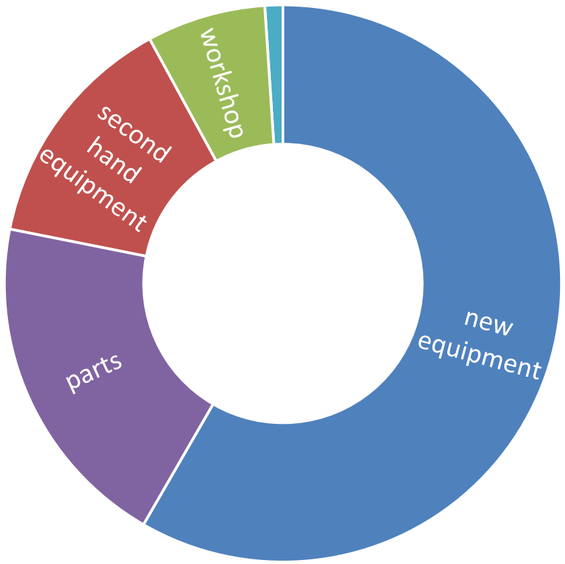
Turnover structure in average European dealerships in %



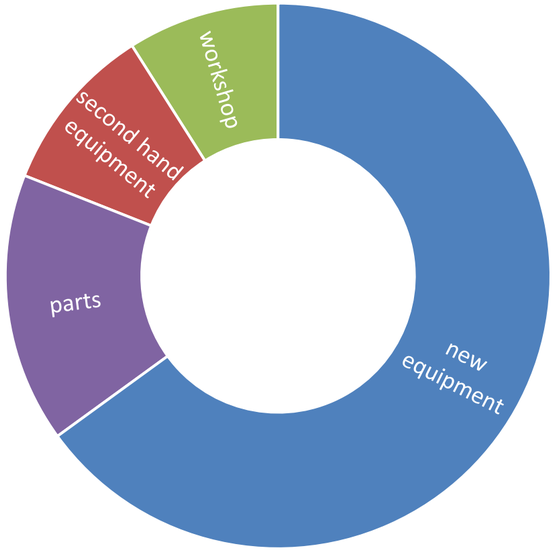
Italy



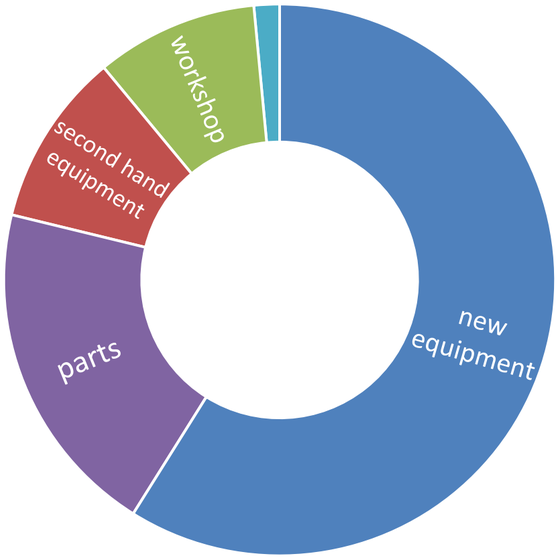
France



Czech Republic



Germany



Source: CLIMMAR

04.

Dealer Satisfaction Index

SUMMARY

I. The scope of the survey

II. Results 2026 and evolutions

III. Conclusion

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

I. The scope of the survey



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

Reminder about the process

Start : 31/03/2026
End : 27/05/2026

8 countries included


Allemagne


Belgique


Danemark


France

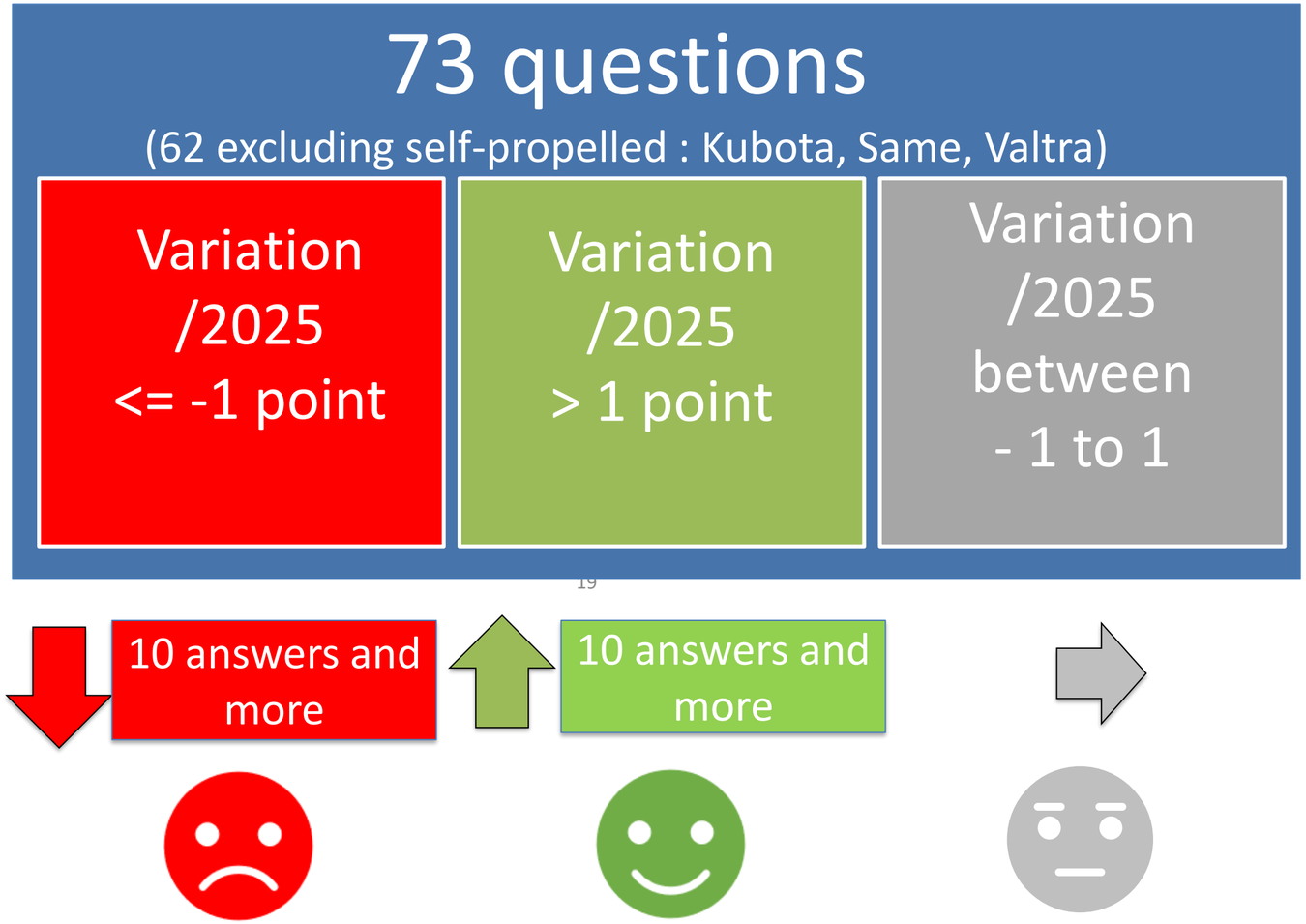

Hongrie


Italie

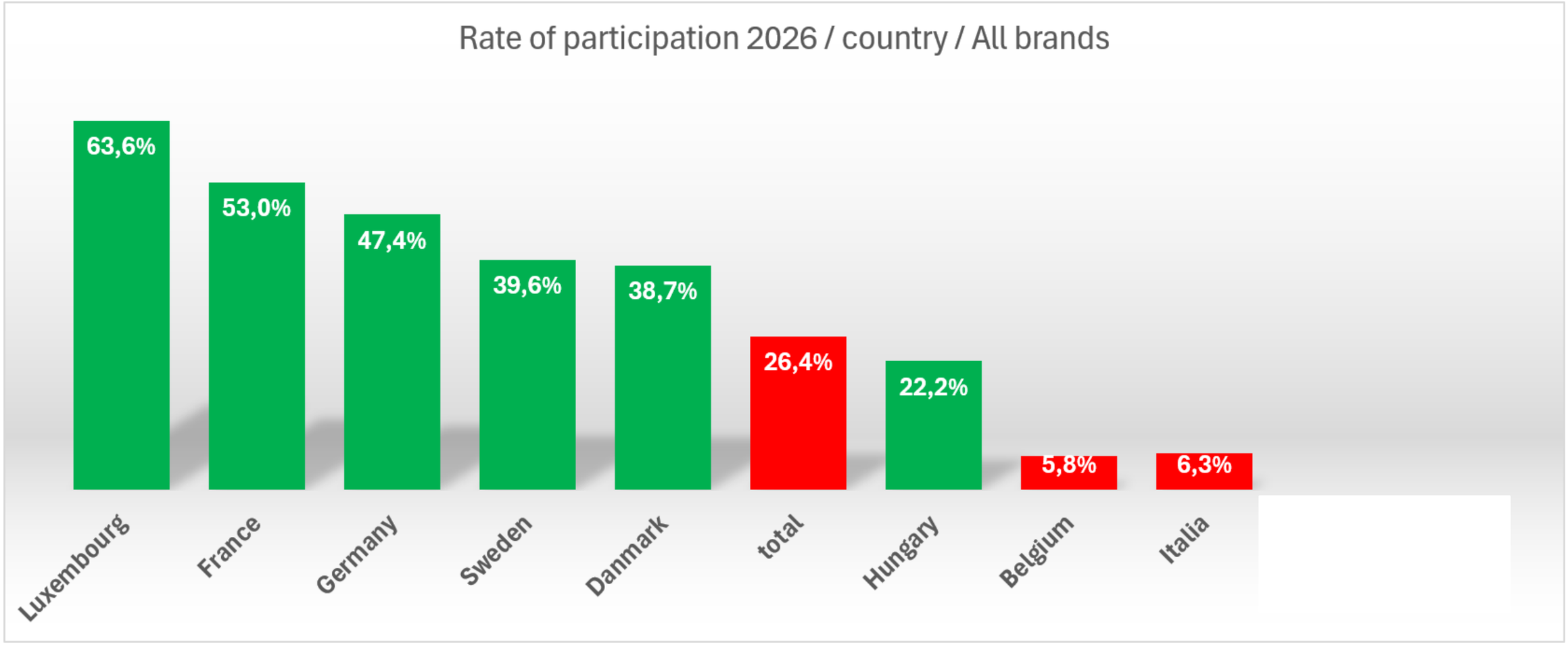

Suède


Luxembourg

Legend : reading the diagram for each brand

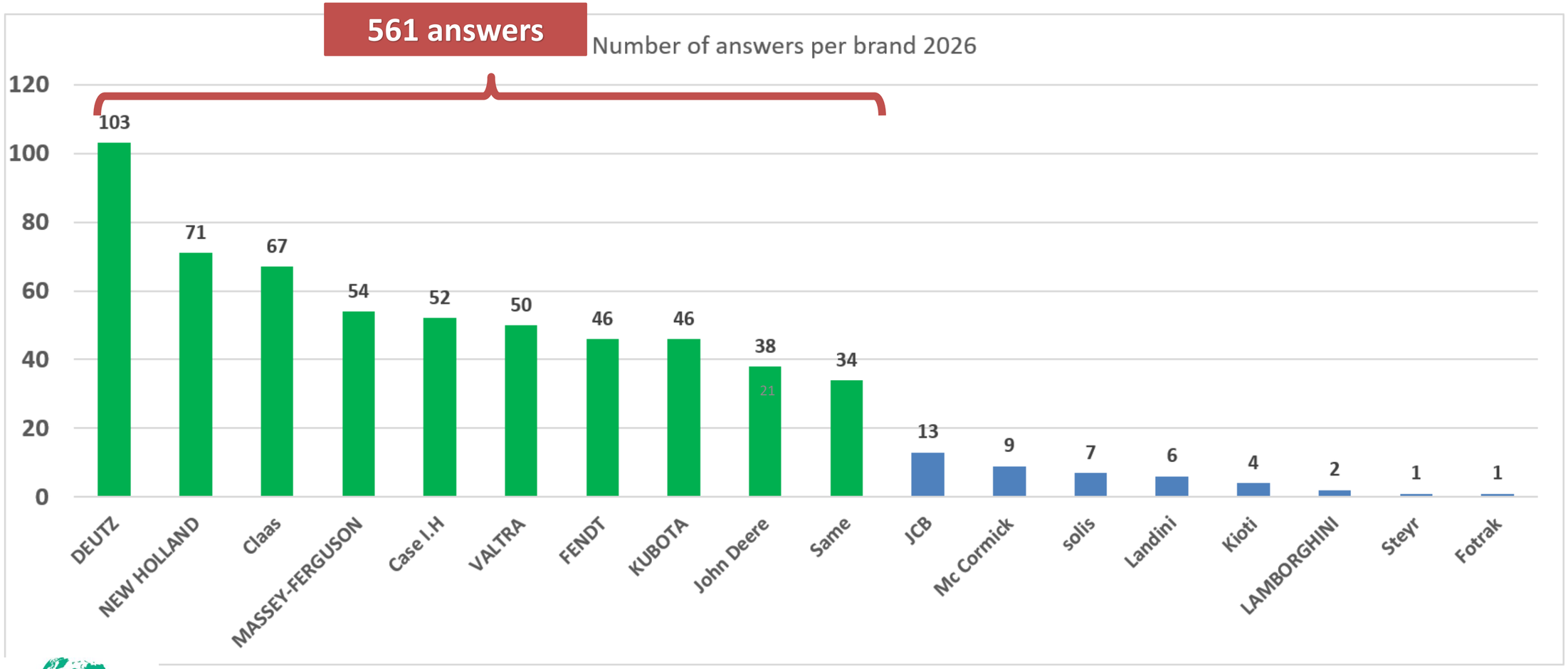


Rate of answers per country



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Number of answers per brand



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BRAND ANALYSIS COMPARED 2026/2025 and 12-years evolution



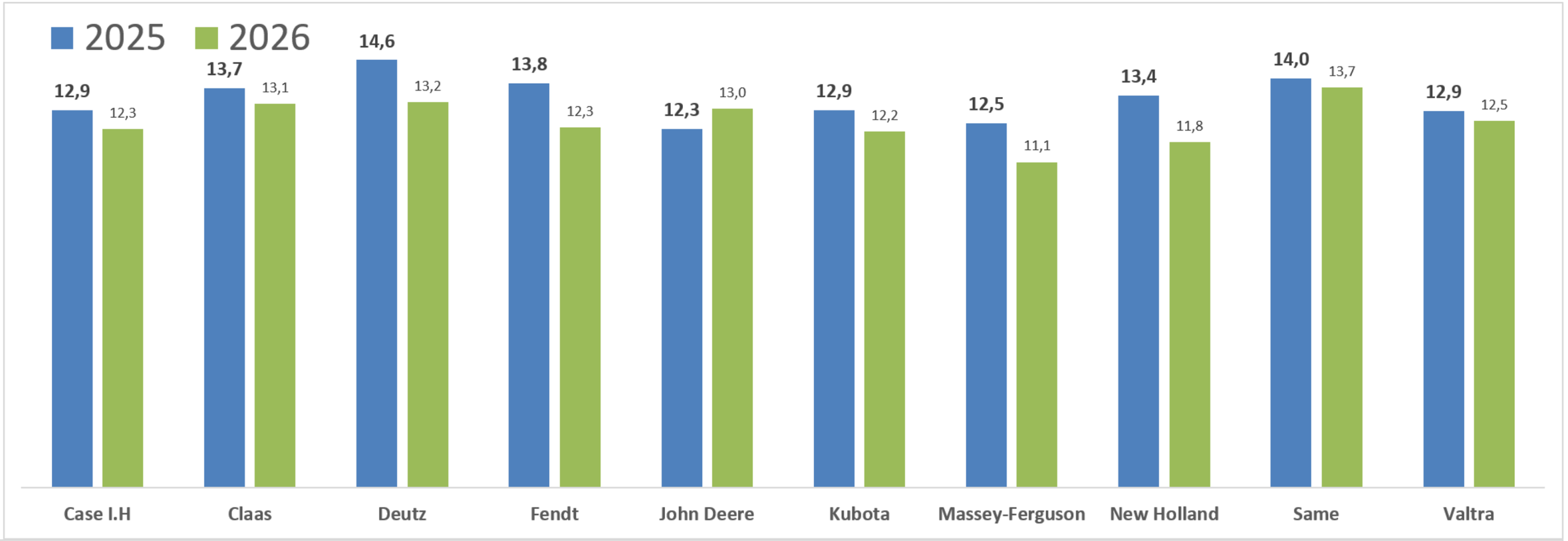
CLIMMAR
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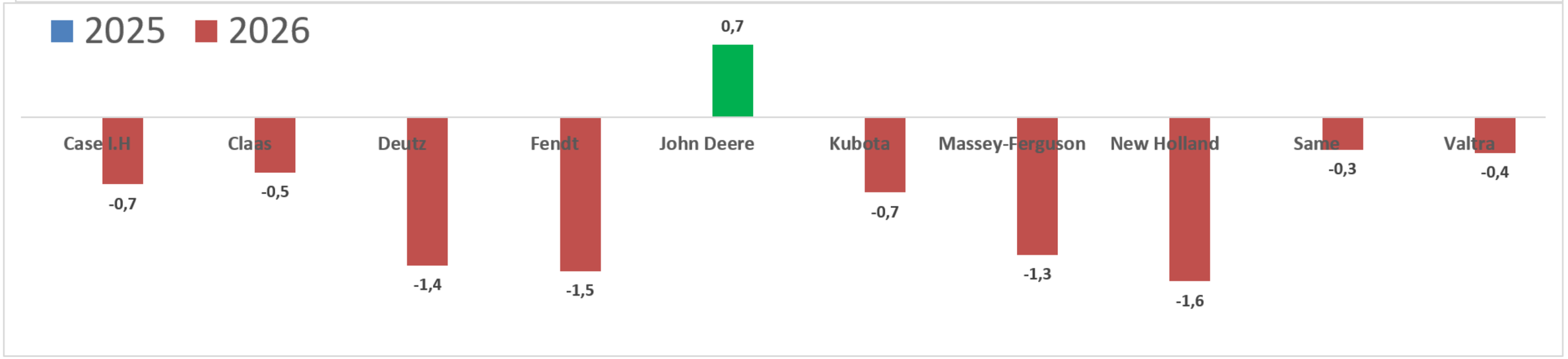
II. RESULTS 2026 BY BRAND AND EVOLUTION/11 YEARS



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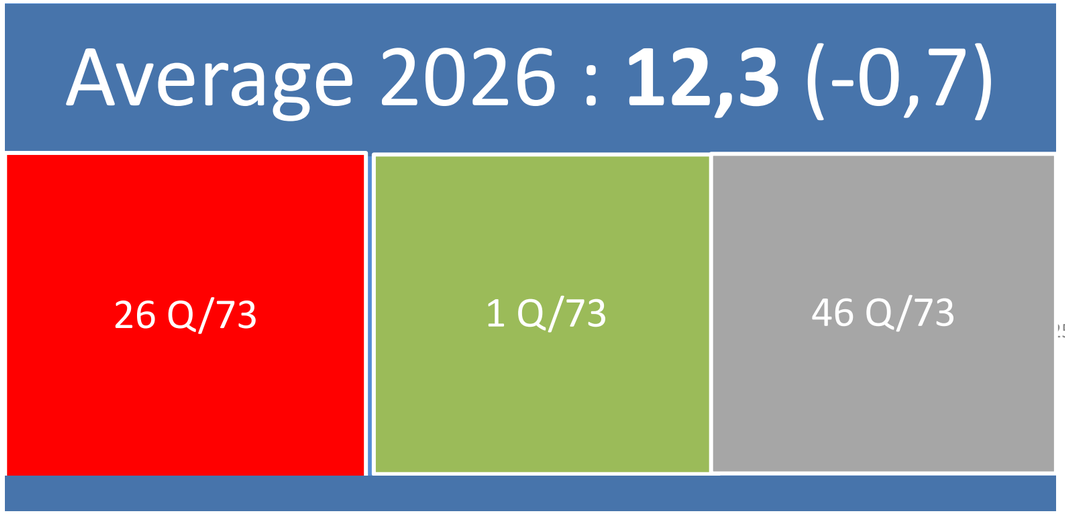
General average by brand 2025 and 2026





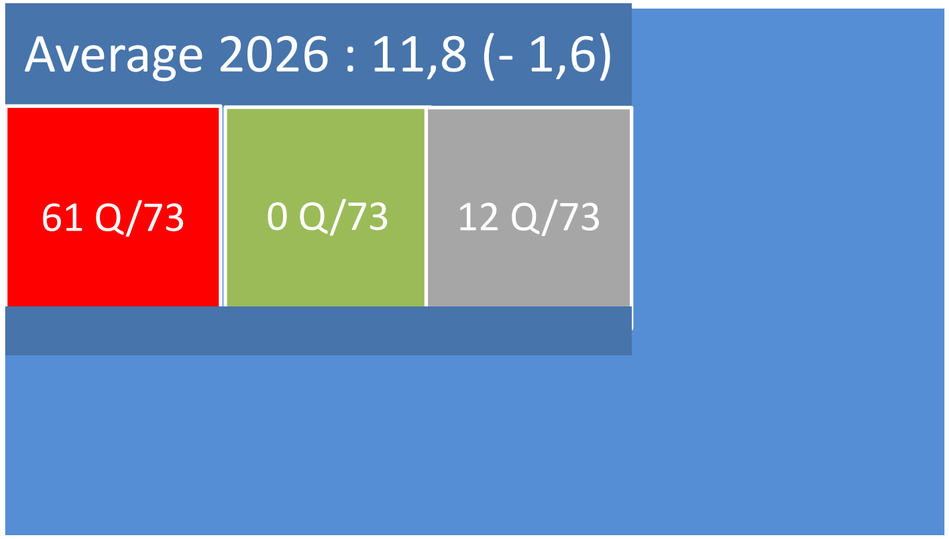






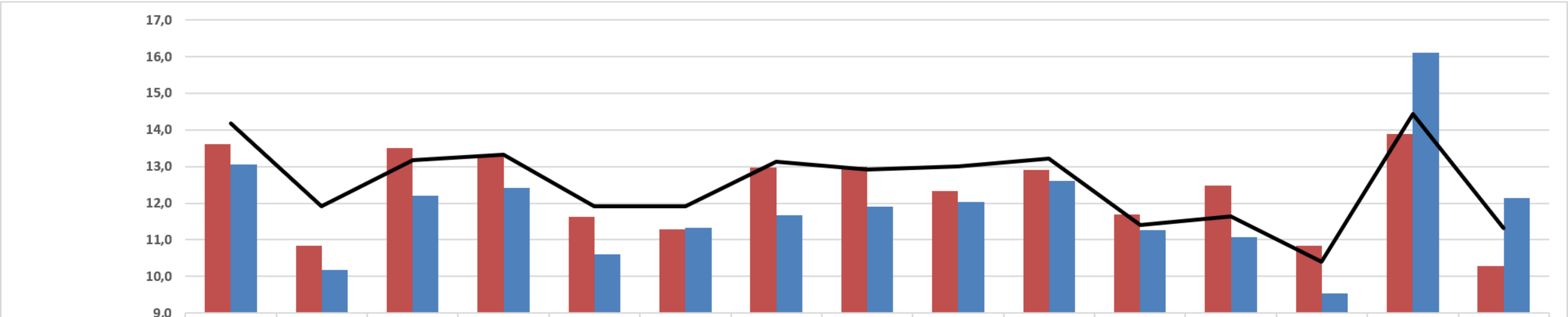






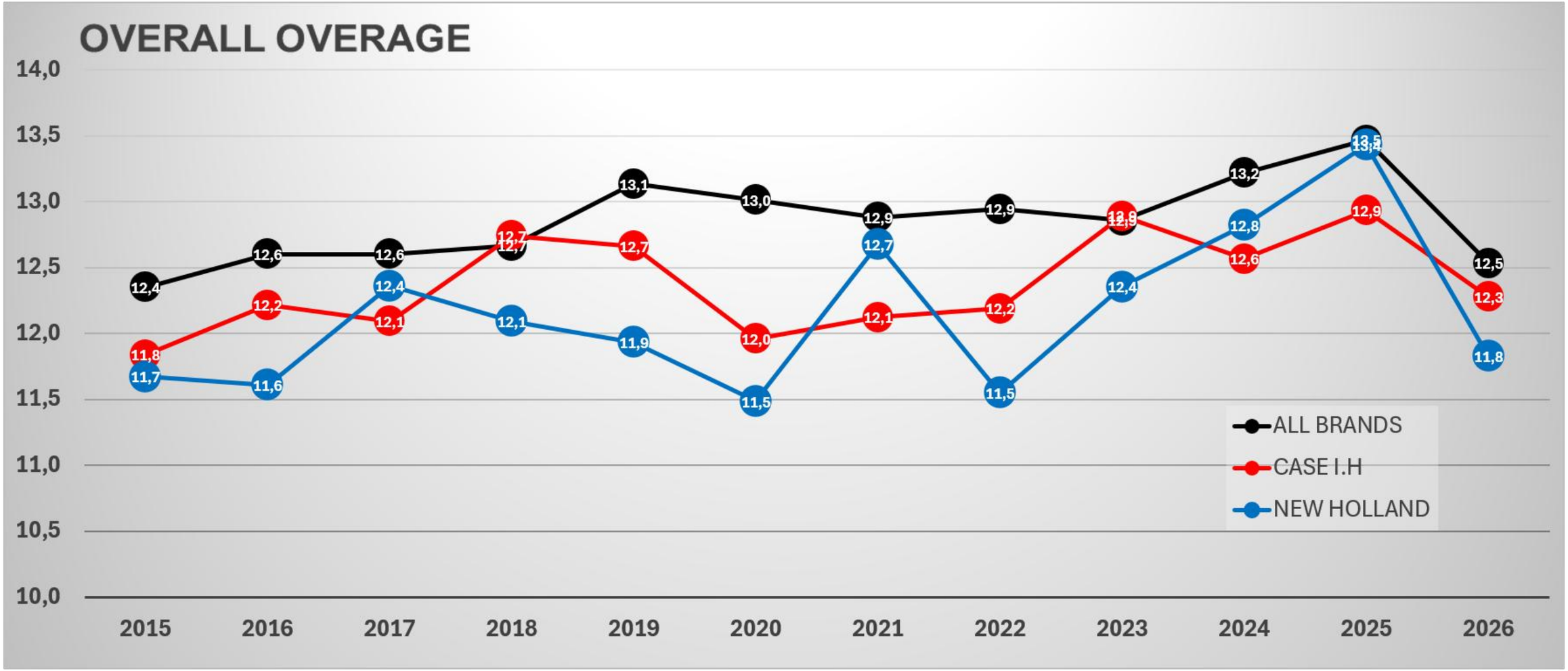
CLIMMAR
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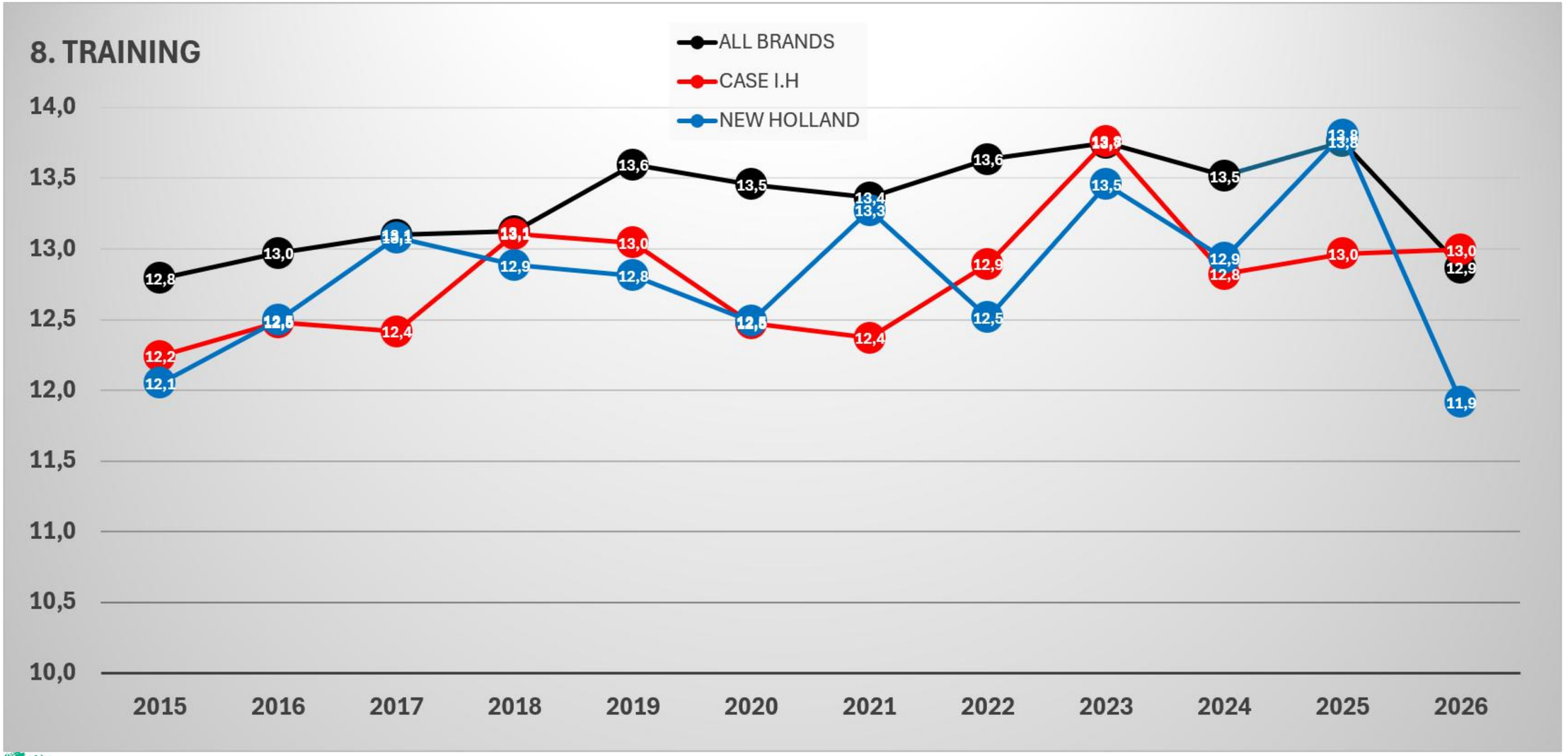
Score 2026 for each heading compared with the overall average for all brands



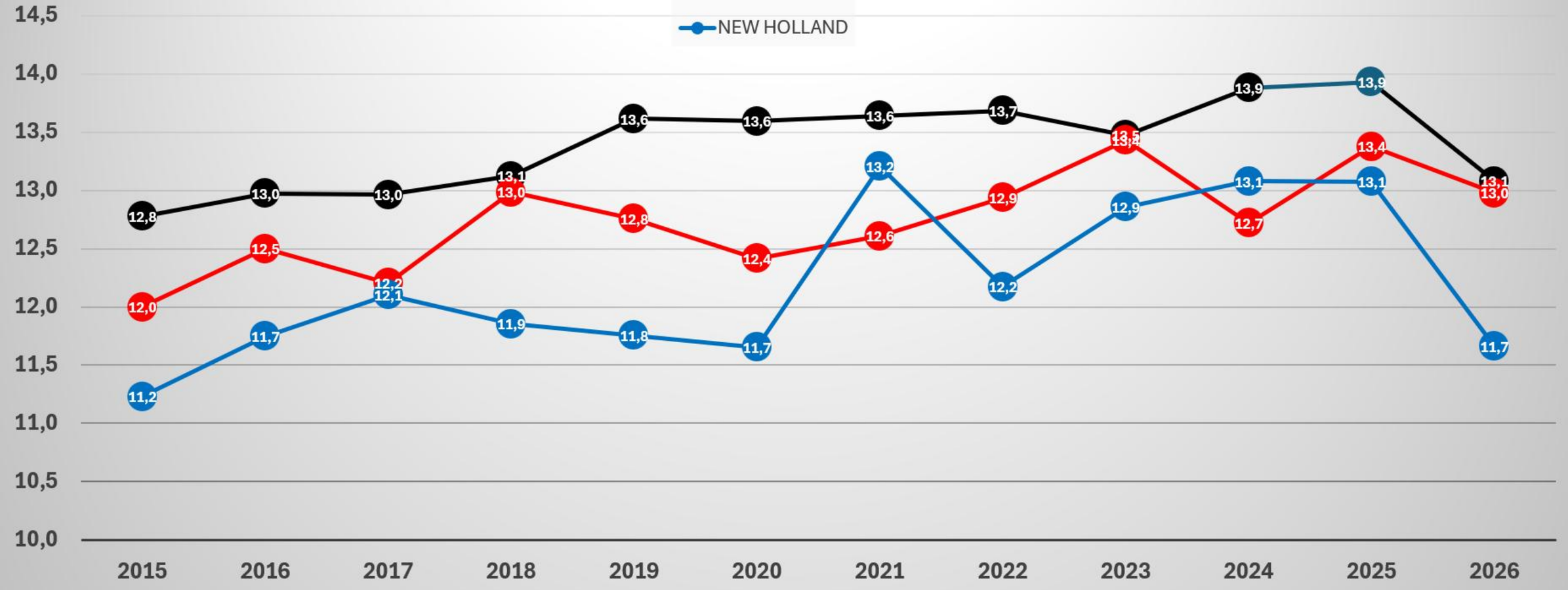
	1. BRAND IMAGE AND IMPACT	2. MARKETING OF TRACTORS	3. MARKETING OF SPARE PARTS	4. AFTER-SALES SERVICE AND WARRANTY	5. COMPUTER SERVICES	6. ADVERTISING AND PRODUCT SUPPORT MATERIAL	7. ADMINISTRATION AND TERMS OF PAYMENT	8. TRAINING	9. THE MANAGEMENT	10. MANUFACTURER-DEALER RELATIONS	11. PROFITABILITY CONTRIBUTION	12. IMPROVEMENTS	13. FINANCING OFFERS	14. BRAND IMAGE AND IMPACT (self-propelled)	15. MARKETING OF SELF-PROPELLED
Case I.H	13,6	10,8	13,5	13,3	11,6	11,3	13,0	13,0	12,3	12,9	11,7	12,5	10,8	13,9	10,3
New Holland	13,0	10,2	12,2	12,4	10,6	11,3	11,7	11,9	12,0	12,6	11,3	11,1	9,5	16,1	12,1
Average all brands	14,2	11,9	13,2	13,3	11,9	11,9	13,1	12,9	13,0	13,2	11,4	11,6	10,4	14,4	11,3

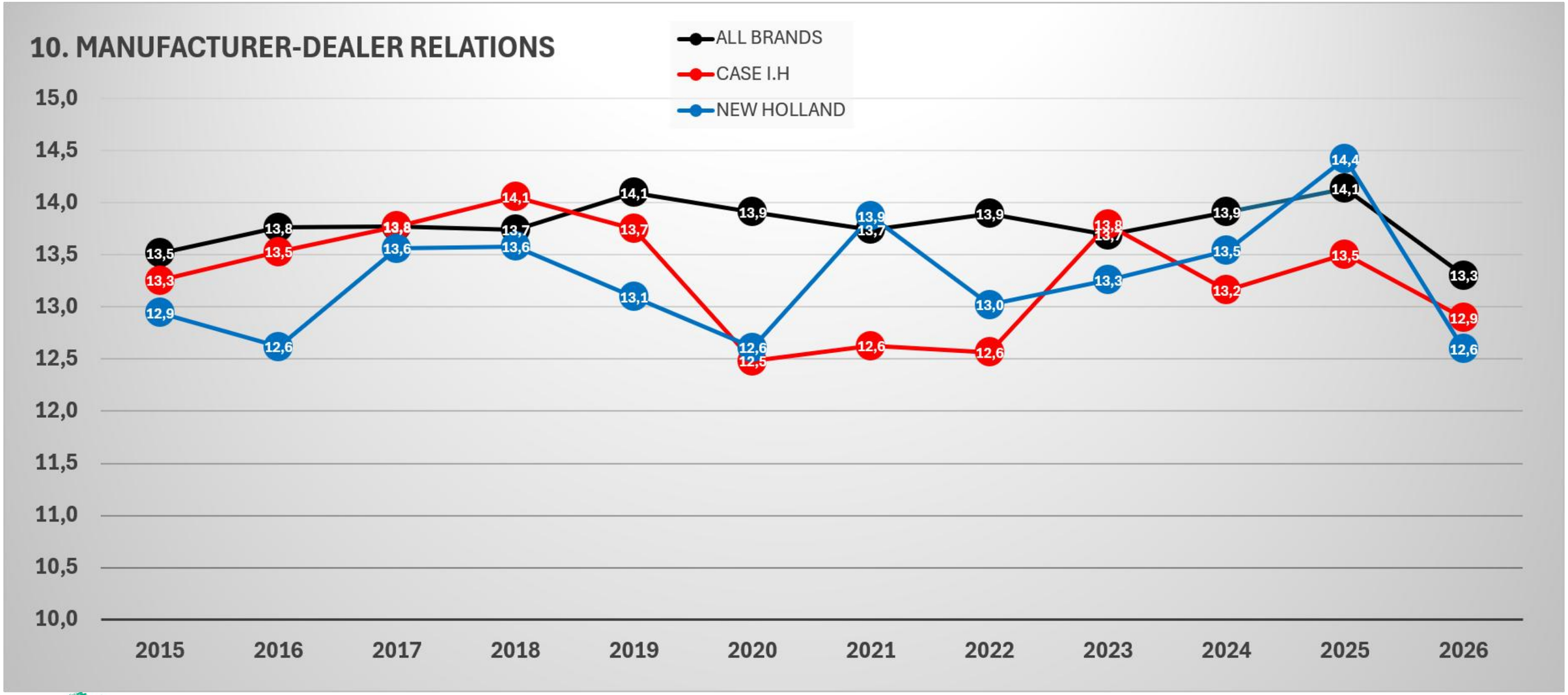
EVOLUTION / 11 years

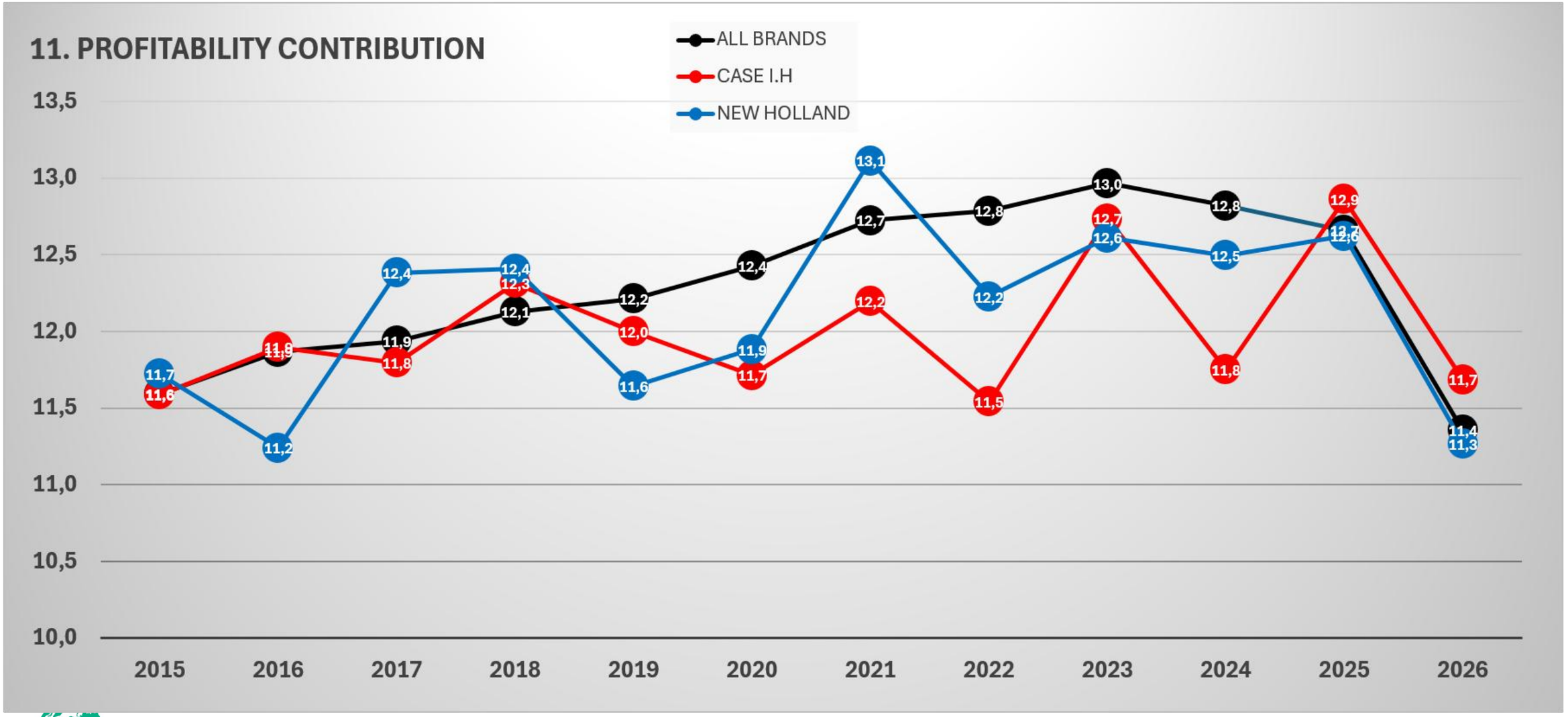

OVERALL OVERAGE
14,0
13,5
13,0
12,5
12,0
11,5
11,0
10,5
10,0
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
2026
ALL BRANDS
CASE I.H
NEW HOLLAND
12,4
12,6
12,6
13,1
13,0
12,9
12,9
13,2
13,5
12,5
11,8
12,2
12,1
12,7
12,7
12,0
12,1
12,2
12,8
12,6
12,9
12,3
11,7
11,6
12,4
12,1
11,9
11,5
12,7
11,5
12,4
12,8
13,4
11,8


8. TRAINING
ALL BRANDS
CASE I.H
NEW HOLLAND
14,0
13,5
13,0
12,5
12,0
11,5
11,0
10,5
10,0
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
2026
12,8
13,0
13,1
13,6
13,5
13,4
13,6
13,8
13,5
13,8
13,0
12,9
12,2
12,5
12,4
13,1
13,0
12,5
12,4
12,9
13,8
12,8
13,0
13,0
12,1
12,5
13,1
12,9
12,8
12,5
13,3
12,5
13,5
12,9
11,9

7. ADMINISTRATION AND TERMS OF PAYMENT

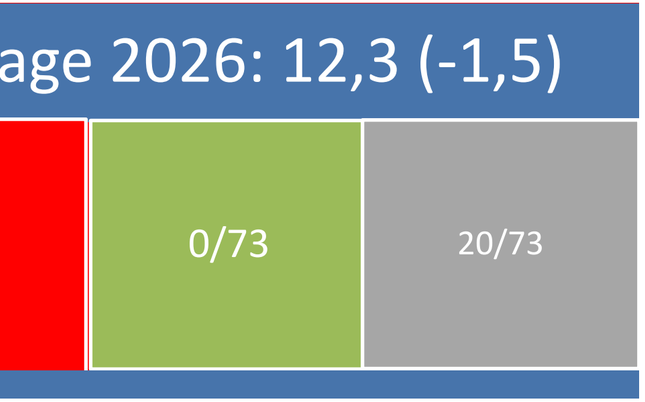



10. MANUFACTURER-DEALER RELATIONS
ALL BRANDS
CASE I.H
NEW HOLLAND
15,0
14,5
14,0
13,5
13,0
12,5
12,0
11,5
11,0
10,5
10,0
2015
2016
2017
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2019
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2021
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2023
2024
2025
2026
13,5
13,8
13,7
14,1
13,9
13,7
13,9
13,7
13,9
14,1
13,3
13,3
13,5
13,8
14,1
13,7
12,5
12,6
12,6
13,8
13,2
13,5
12,9
12,9
12,6
13,6
13,6
13,1
12,6
13,9
13,0
13,3
13,5
14,4
12,6


11. PROFITABILITY CONTRIBUTION
ALL BRANDS
CASE I.H
NEW HOLLAND
13,5
13,0
12,5
12,0
11,5
11,0
10,5
10,0
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
2026

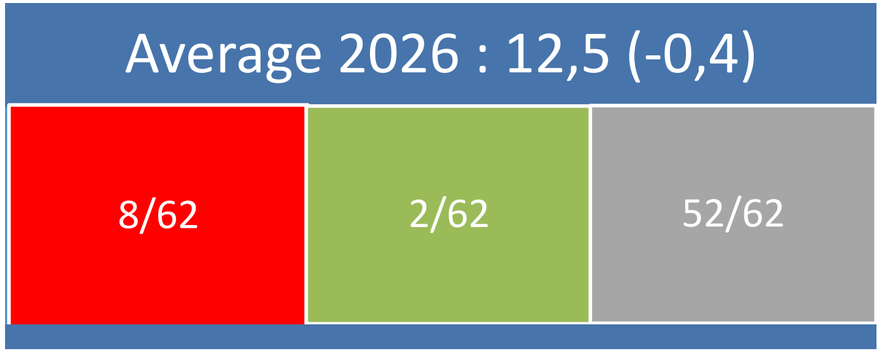
FENDT





VALTRA

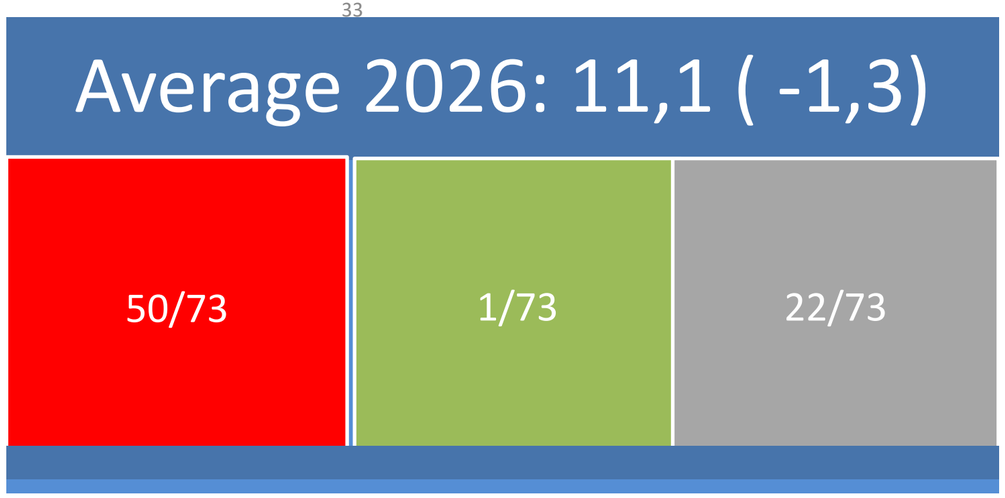






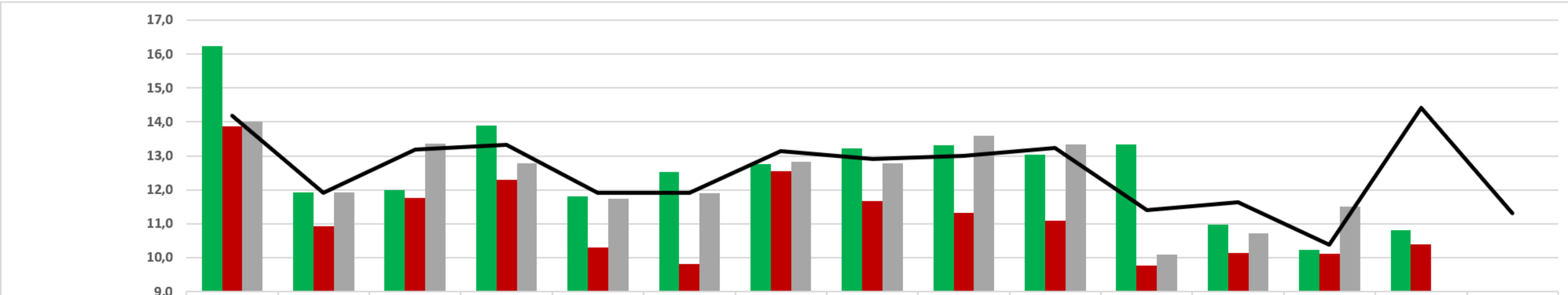
MASSEY FERGUSON





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Score 2026 for each heading compared with the overall average for all brands



	1. BRAND IMAGE AND IMPACT	2. MARKETING OF TRACTORS	3. MARKETING OF SPARE PARTS	4. AFTER-SALES SERVICE 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 OFFERS	14. BRAND IMAGE AND IMPACT (self-propelled)	15. MARKETING OF SELF-PROPELLED
Fendt	16,2	11,9	12,0	13,9	11,8	12,5	12,8	13,2	13,3	13,0	13,3	11,0	10,2	10,8	9,0
Massey-Ferguson	13,9	10,9	11,8	12,3	10,3	9,8	12,5	11,7	11,3	11,1	9,8	10,1	10,1	10,4	8,4
Valtra	14,0	11,9	13,4	12,8	11,7	11,9	12,8	12,8	13,6	13,3	10,1	10,7	11,5	0,0	0,0
Average all brands	14,2	11,9	13,2	13,3	11,9	11,9	13,1	12,9	13,0	13,2	11,4	11,6	10,4	14,4	11,3

EVOLUTION / 12 years

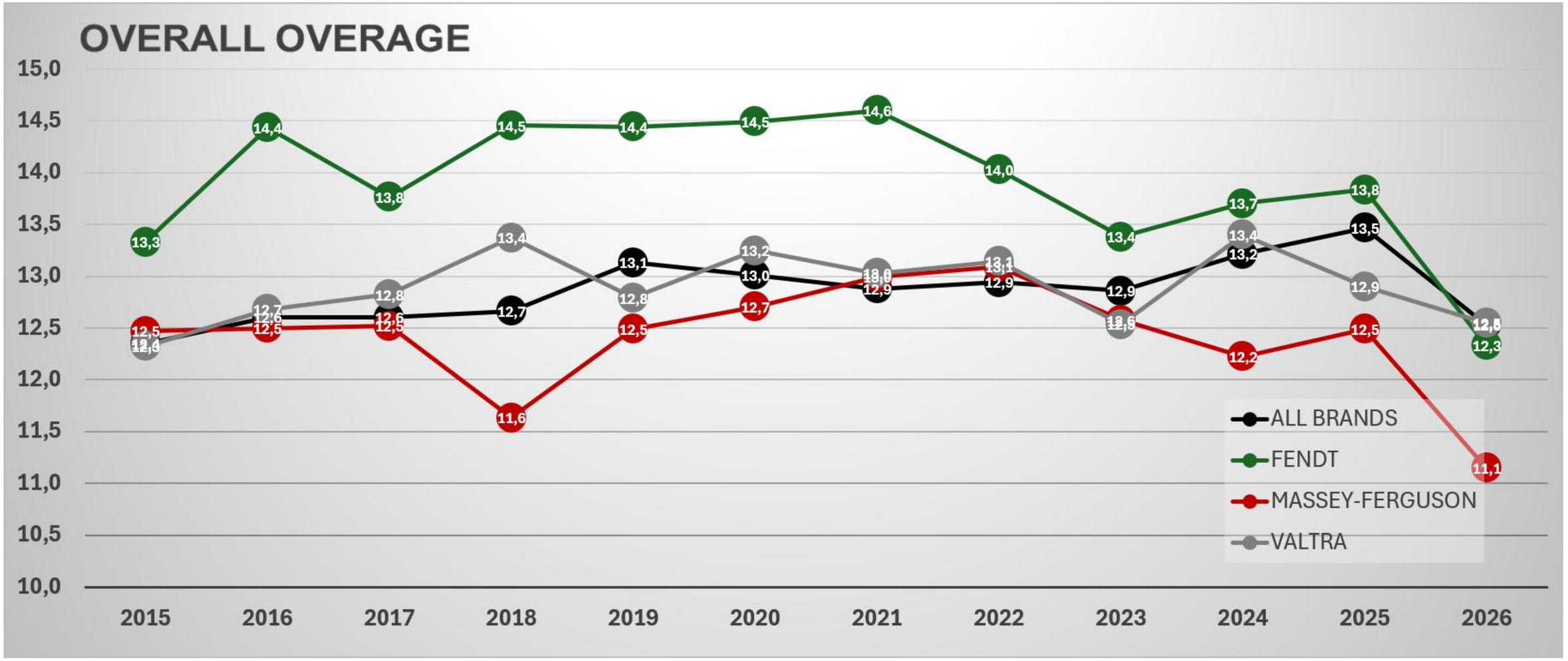


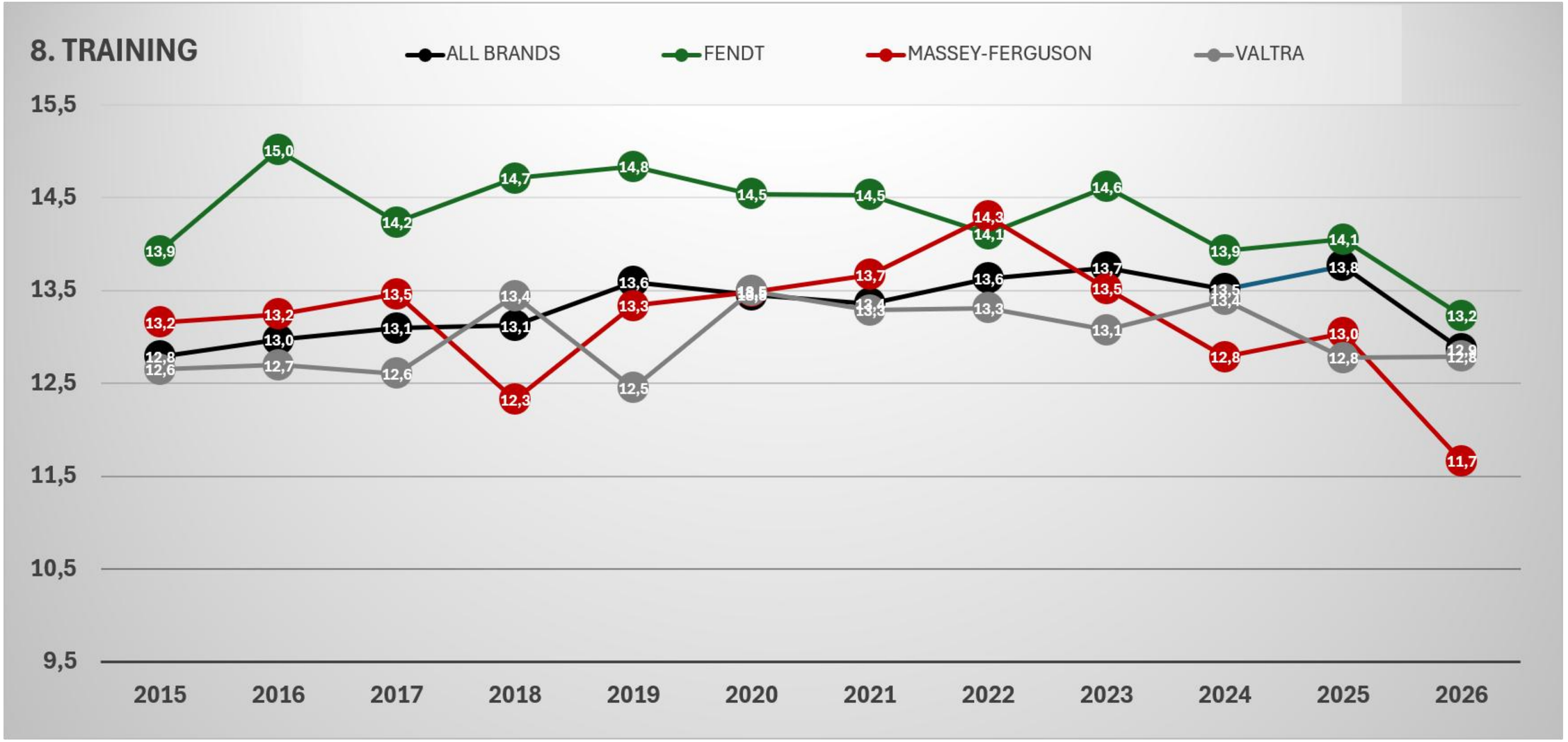
FENDT

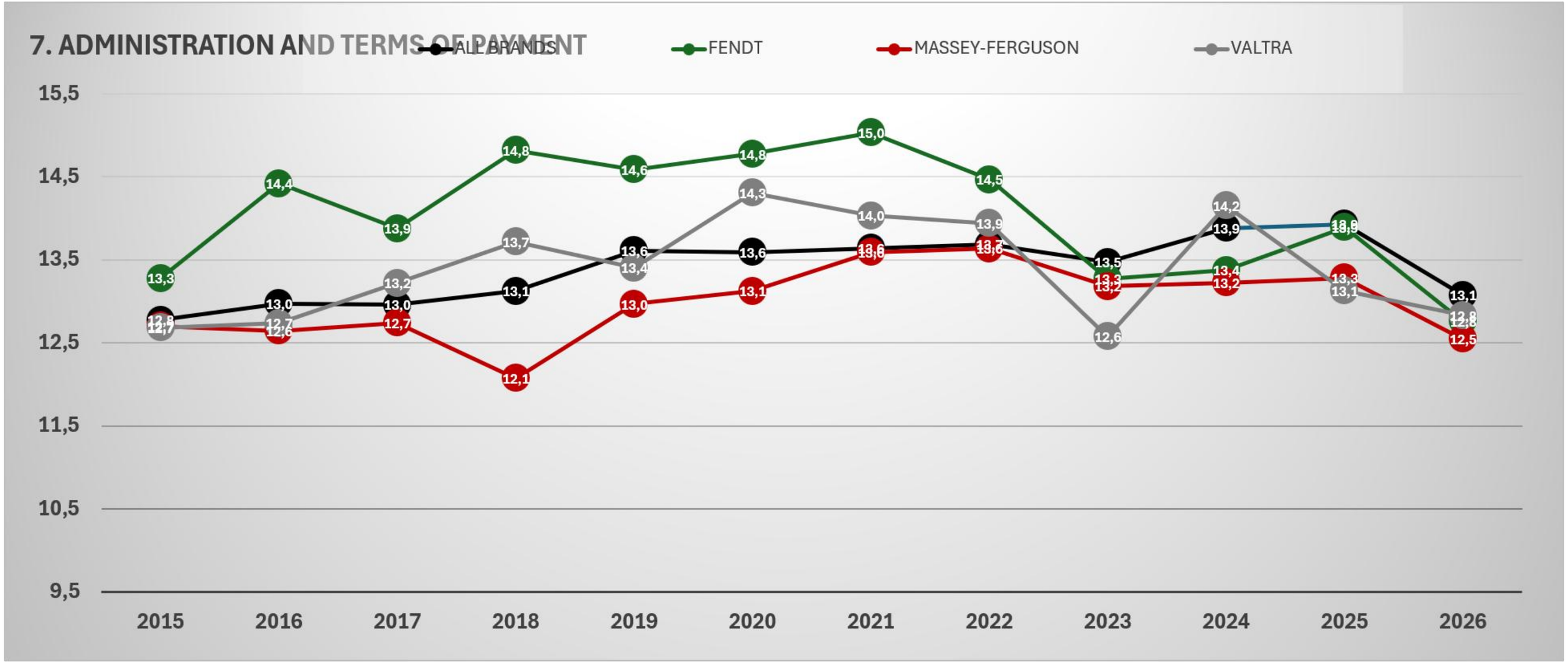
MASSEY FERGUSON

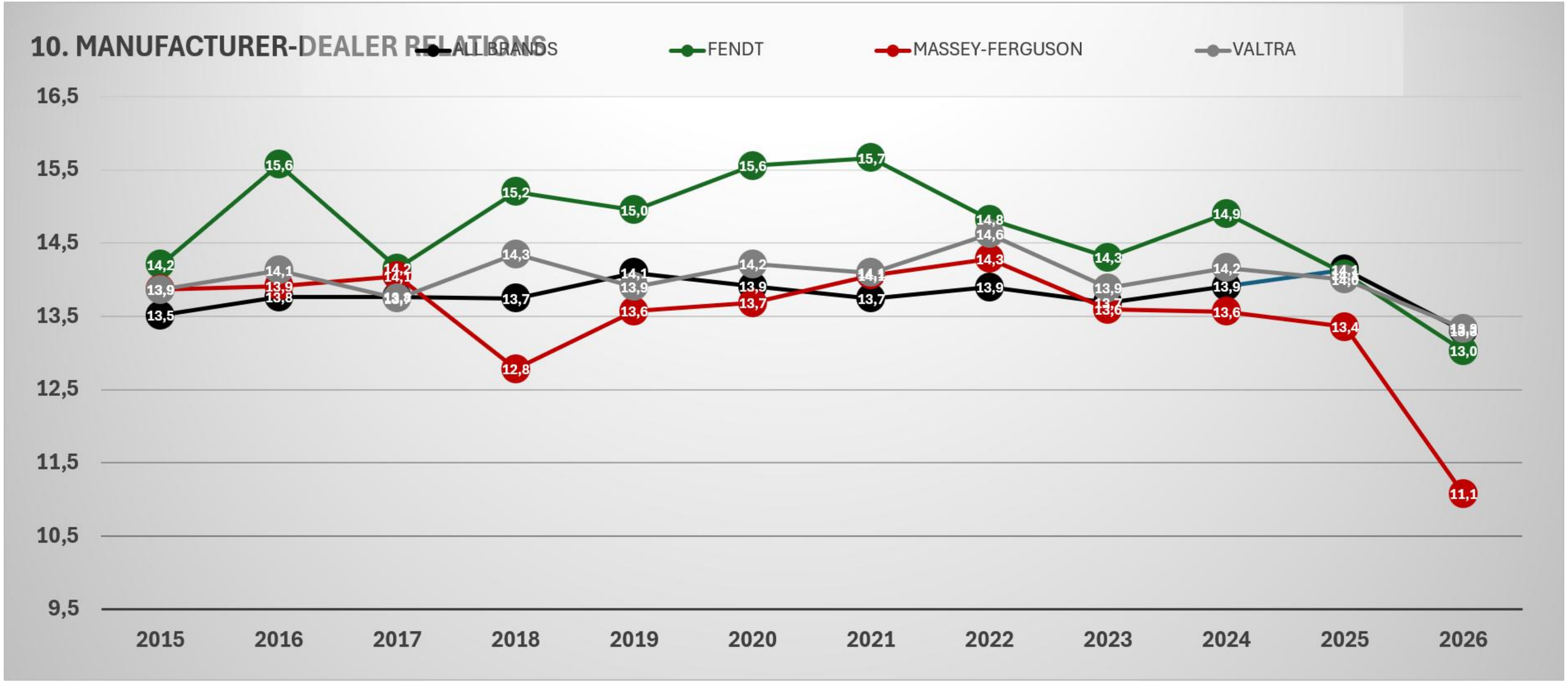
VALTRA

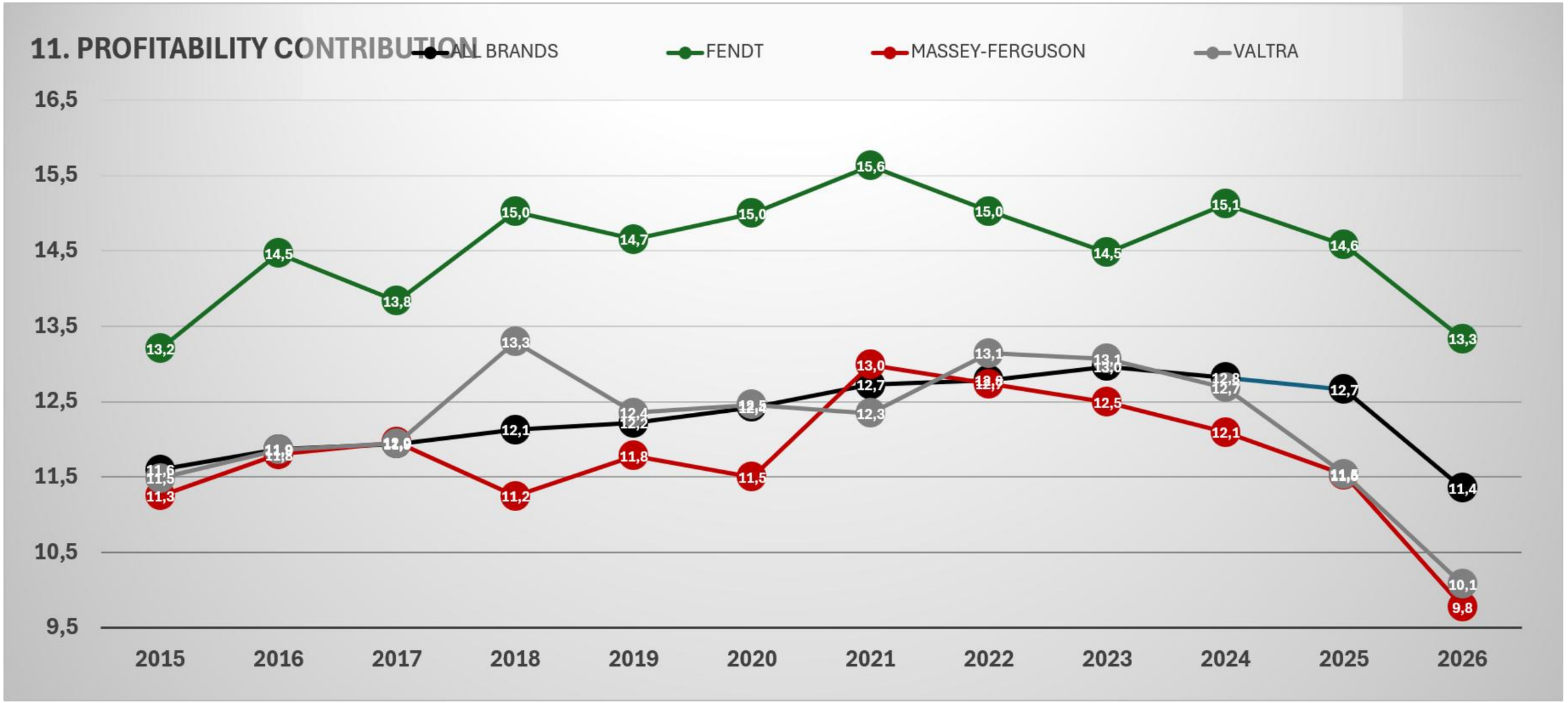
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OVERALL OVERAGE
15,0
14,5
14,0
13,5
13,0
12,5
12,0
11,5
11,0
10,5
10,0
2015
2016
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2020
2021
2022
2023
2024
2025
2026
ALL BRANDS
FENDT
MASSEY-FERGUSON
VALTRA


8. TRAINING
ALL BRANDS
FENDT
MASSEY-FERGUSON
VALTRA
15,5
14,5
13,5
12,5
11,5
10,5
9,5
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
2026


7. ADMINISTRATION AND TERMS OF PAYMENT
ALL BRANDS
FENDT
MASSEY-FERGUSON
VALTRA
15,5
14,5
13,5
12,5
11,5
10,5
9,5
2015
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2022
2023
2024
2025
2026


10. MANUFACTURER-DEALER RELATIONS
ALL BRANDS
FENDT
MASSEY-FERGUSON
VALTRA
16,5
15,5
14,5
13,5
12,5
11,5
10,5
9,5
2015
2016
2017
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2020
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2022
2023
2024
2025
2026


11. PROFITABILITY CONTRIBUTION
ALL BRANDS
FENDT
MASSEY-FERGUSON
VALTRA
16,5
15,5
14,5
13,5
12,5
11,5
10,5
9,5
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
2026
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12,3
13,1
13,0
12,7
10,1
11,6
12,1
12,2
12,5
12,7
12,8
12,7
11,4





Average 2026 : 13,2 (-1,4)

53/73	0/73	20/73



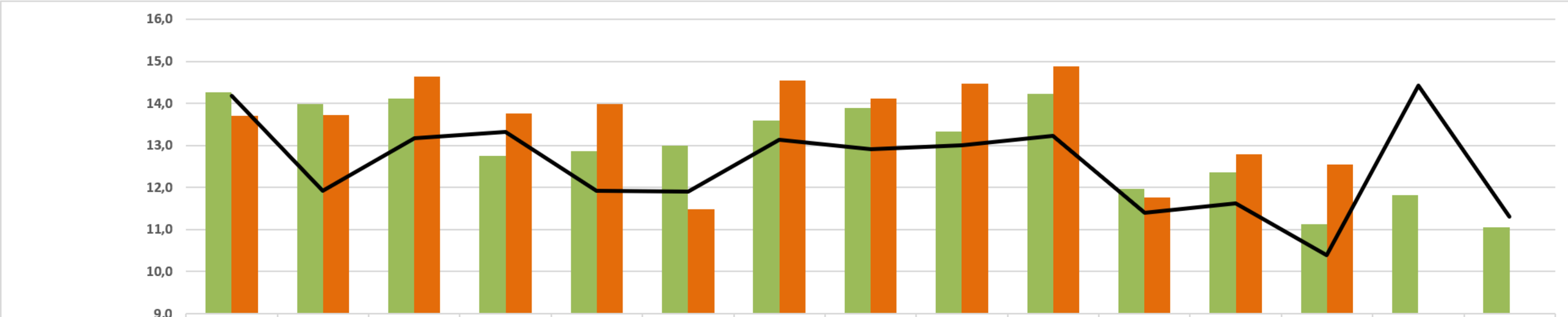


Average 2026 : 13,7 (-0,3)

12/62	3/62	47/62

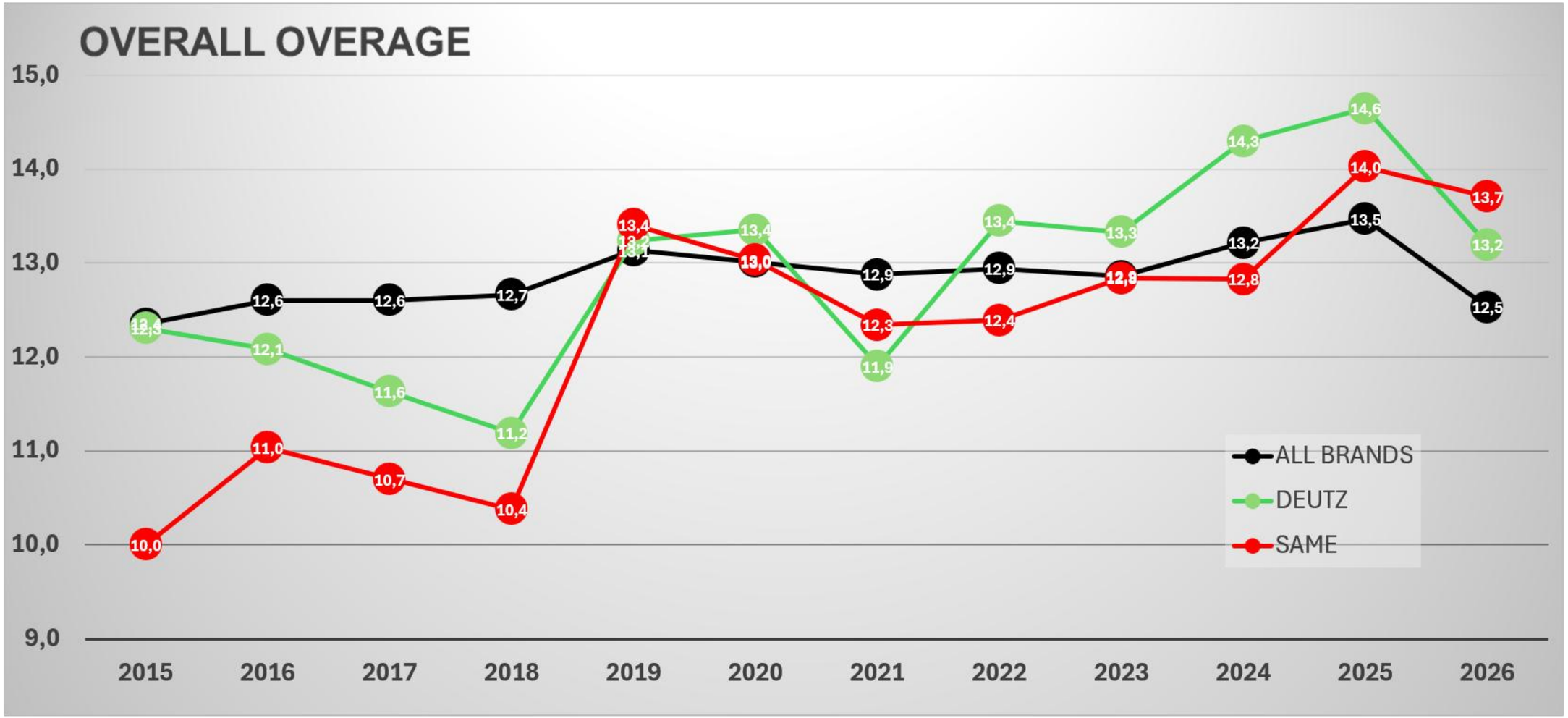
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International Confederation of National Associations of Dealers and Repairers of Agricultural and Gardening Machinery

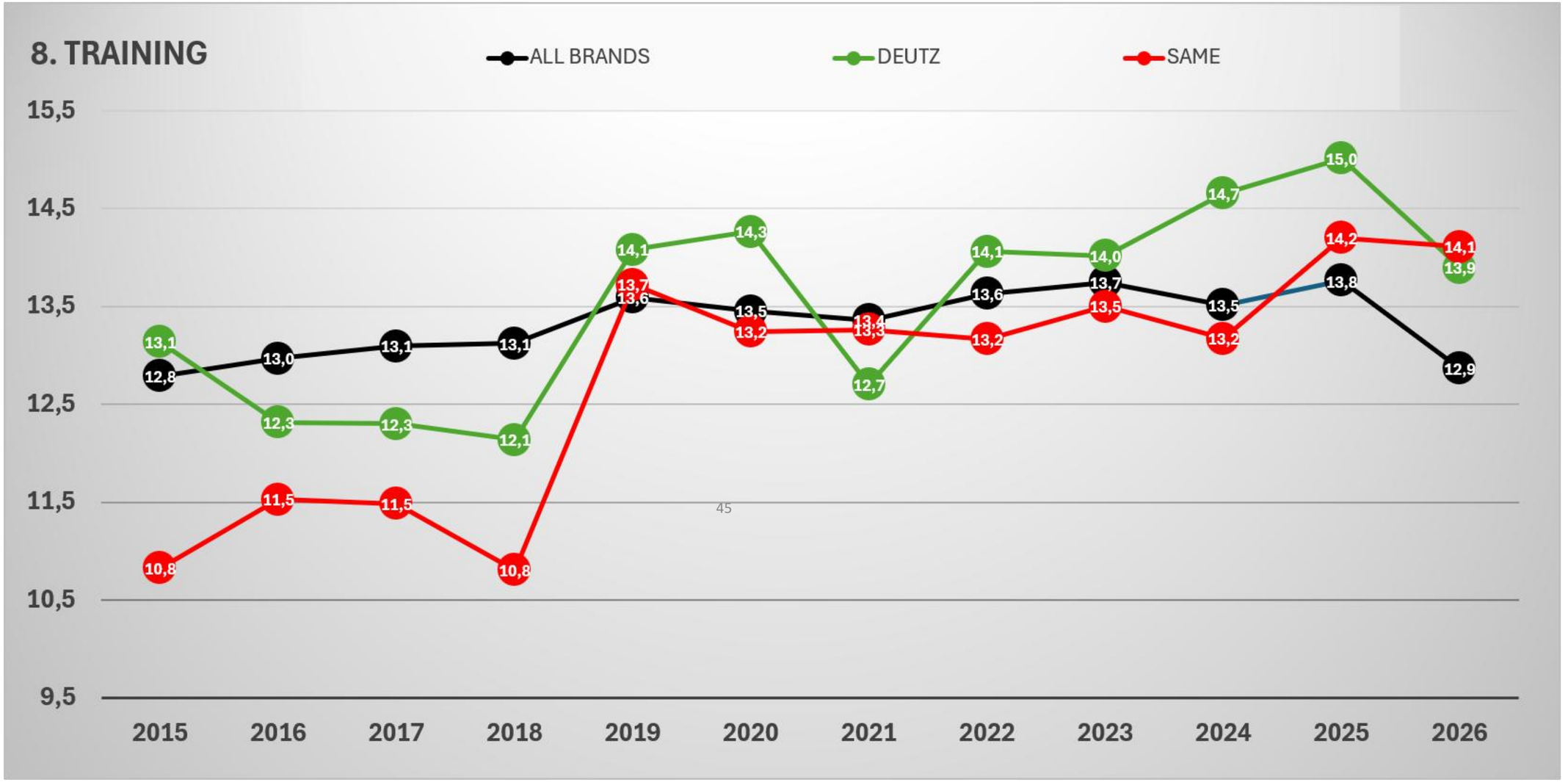
Score 2026 for each heading compared with the overall average for all brands

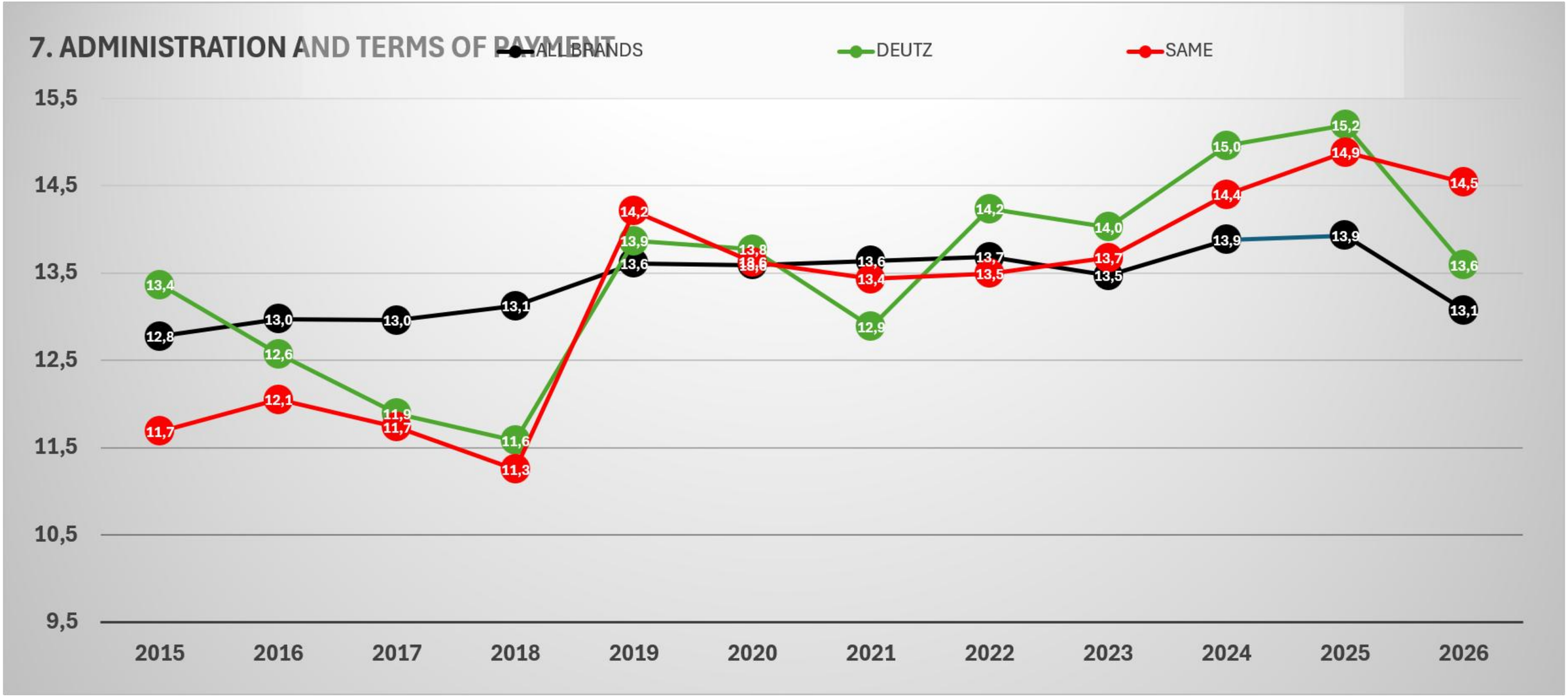


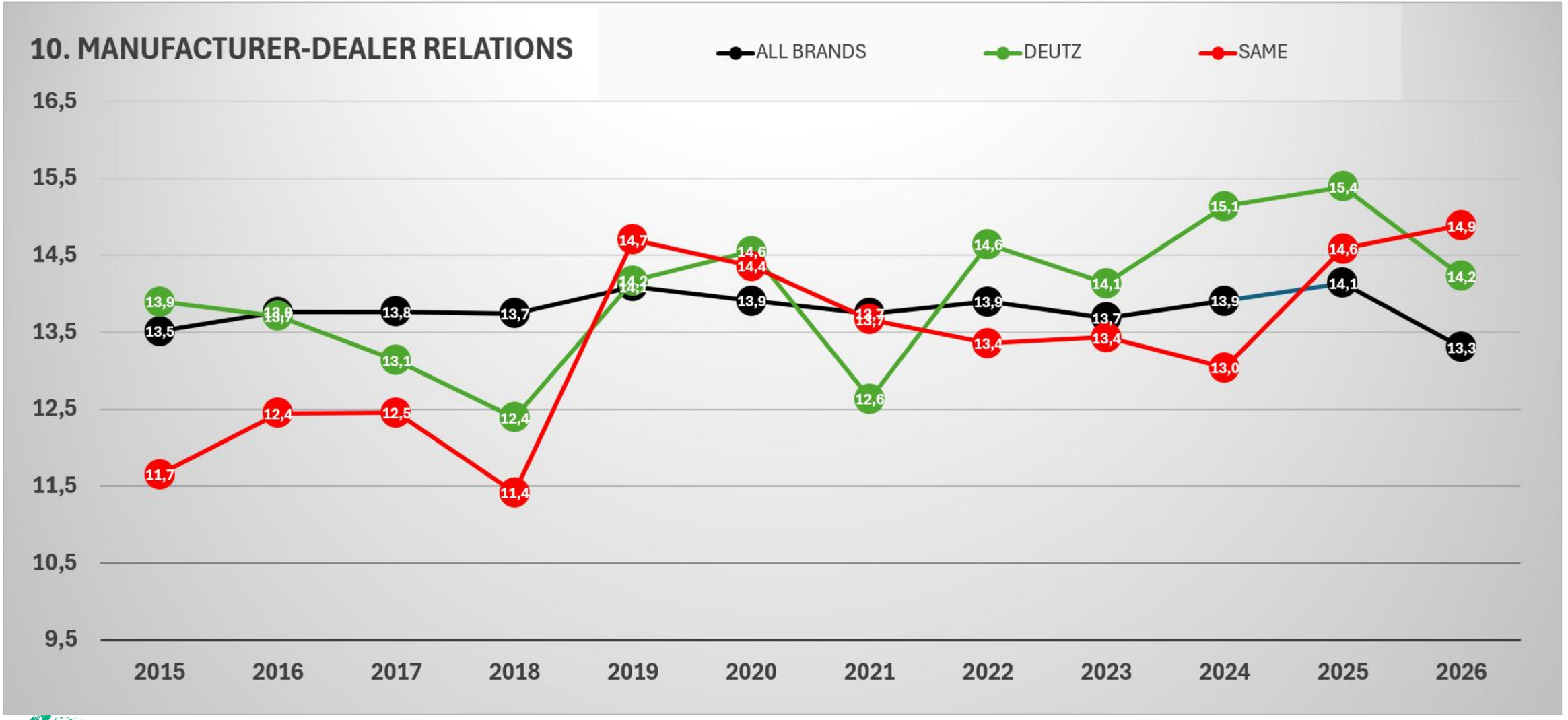
	1. BRAND IMAGE AND IMPACT	2. MARKETING OF TRACTORS	3. MARKETING OF SPARE PARTS	4. AFTER-SALES SERVICE AND WARRANTY	5. COMPUTER SERVICES	6. ADVERTISING AND PRODUCT SUPPORT MATERIAL	7. ADMINISTRATION AND TERMS OF PAYMENT	8. TRAINING	9. THE MANAGEMENT	10. MANUFACTURER-DEALER RELATIONS	11. PROFITABILITY CONTRIBUTION	12. IMPROVEMENTS	13. FINANCING OFFERS	14. BRAND IMAGE AND IMPACT (self-propelled)	15. MARKETING OF SELF-PROPELLED
Deutz	14,3	14,0	14,1	12,8	12,9	13,0	13,6	13,9	13,3	14,2	12,0	12,4	11,1	11,8	11,1
Same	13,7	13,7	14,6	13,8	14,0	11,5	14,5	14,1	14,5	14,9	11,8	12,8	12,5	0,0	0,0
Average all brands	14,2	11,9	13,2	13,3	11,9	11,9	13,1	12,9	13,0	13,2	11,4	11,6	10,4	14,4	11,3

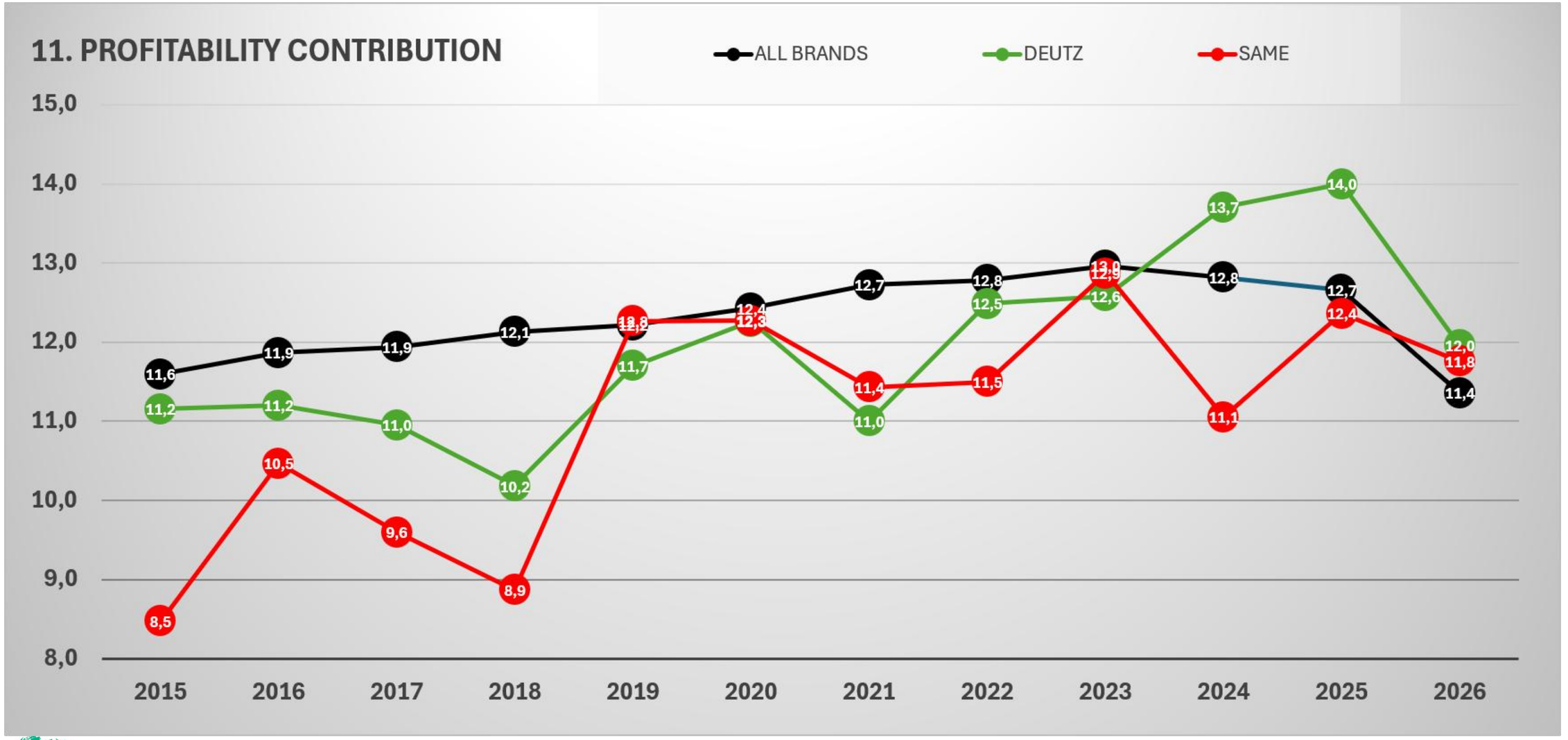
EVOLUTION / 11 years


OVERALL OVERAGE
15,0
14,0
13,0
12,0
11,0
10,0
9,0
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
2026
ALL BRANDS
DEUTZ
SAME
12,6
12,6
12,7
13,1
13,0
12,9
12,9
12,8
13,2
13,5
12,5
12,1
11,6
11,2
13,4
11,9
13,4
13,3
14,3
14,6
13,2
11,0
10,7
10,4
13,4
12,3
12,4
12,8
12,8
14,0
13,7
10,0


8. TRAINING
ALL BRANDS
DEUTZ
SAME
15,5
14,5
13,5
12,5
11,5
10,5
9,5
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
2026
13,1
12,8
13,0
13,1
13,1
13,6
13,5
13,4
13,6
13,7
13,5
13,8
12,9
12,3
12,3
12,1
14,1
14,3
12,7
14,1
14,0
14,7
15,0
13,9
10,8
11,5
11,5
10,8
13,7
13,2
13,3
13,2
13,5
13,2
14,2
14,1

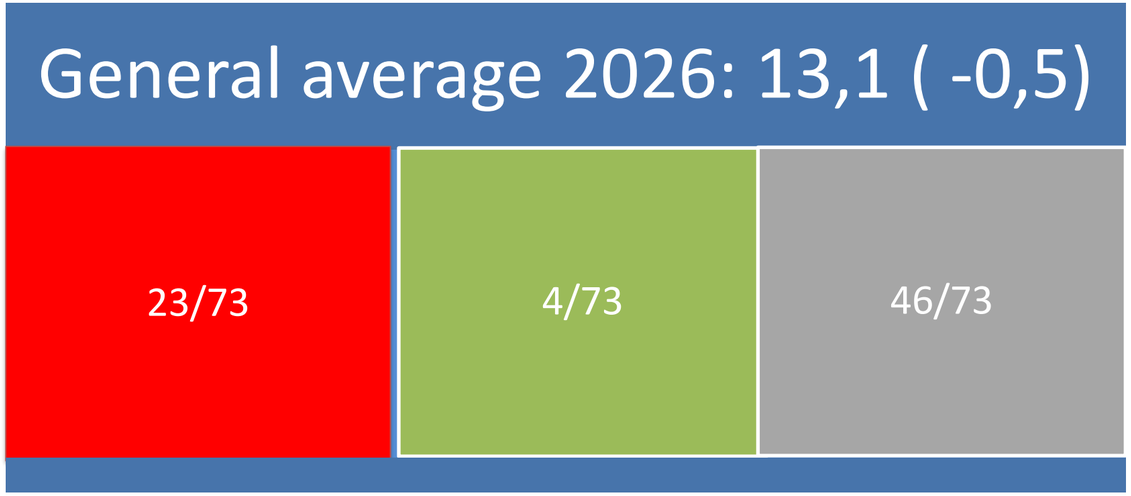

7. ADMINISTRATION AND TERMS OF PAYMENT
ALL BRANDS
DEUTZ
SAME
15,5
14,5
13,5
12,5
11,5
10,5
9,5
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
2026
13,4
12,6
11,9
11,6
13,9
14,2
12,9
14,2
15,0
14,0
15,2
13,6
12,8
13,0
13,0
13,1
13,6
13,6
13,6
13,7
13,5
13,9
13,9
13,1
11,7
12,1
11,7
11,3
13,8
13,4
13,5
13,7
14,4
14,9
14,5


10. MANUFACTURER-DEALER RELATIONS
ALL BRANDS
DEUTZ
SAME
16,5
15,5
14,5
13,5
12,5
11,5
10,5
9,5
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
2026
13,9
13,5
13,9
13,8
13,7
14,2
13,9
13,7
13,9
13,7
14,1
13,3
13,9
13,1
12,4
14,1
12,6
14,6
14,1
15,1
15,4
14,2
11,7
12,4
12,5
11,4
14,7
14,4
13,7
13,4
13,4
13,0
14,6
14,9


11. PROFITABILITY CONTRIBUTION
ALL BRANDS
DEUTZ
SAME
15,0
14,0
13,0
12,0
11,0
10,0
9,0
8,0
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
2026
11,6
11,9
11,9
12,1
12,2
12,4
12,7
12,8
12,9
12,8
12,7
11,4
11,2
11,2
11,0
10,2
11,7
12,3
11,0
12,5
12,6
13,7
14,0
12,0
8,5
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9,6
8,9
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11,1
12,4
11,8

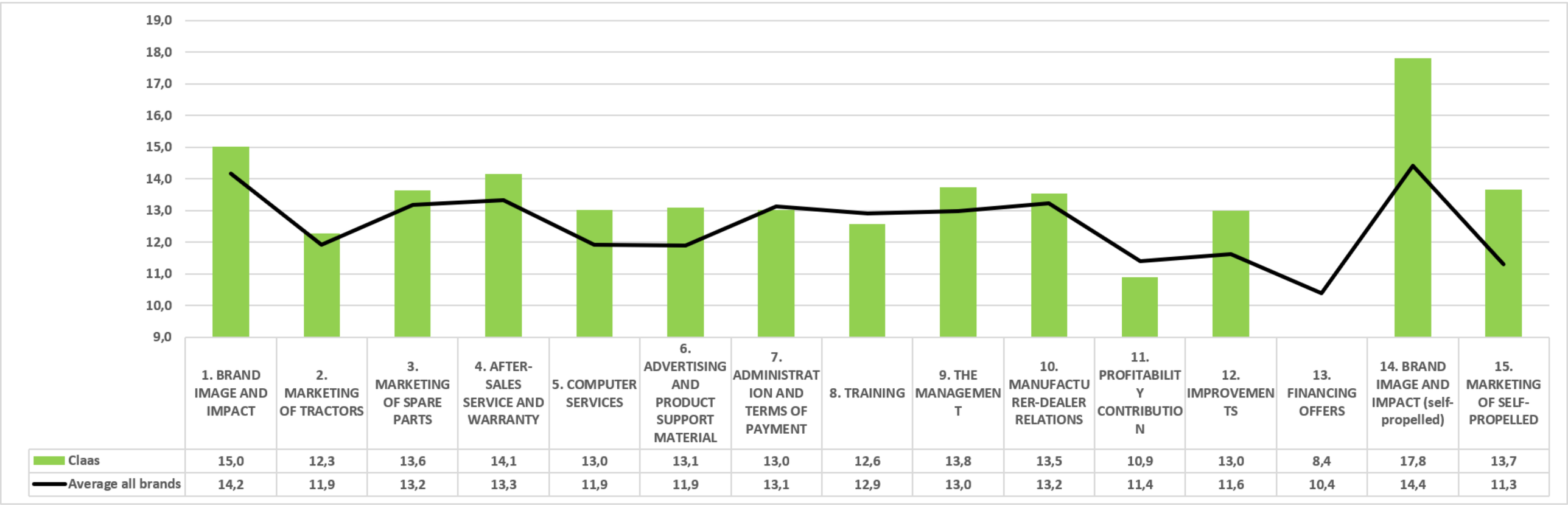






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Score 2026 for each heading compared with the overall average for all brands

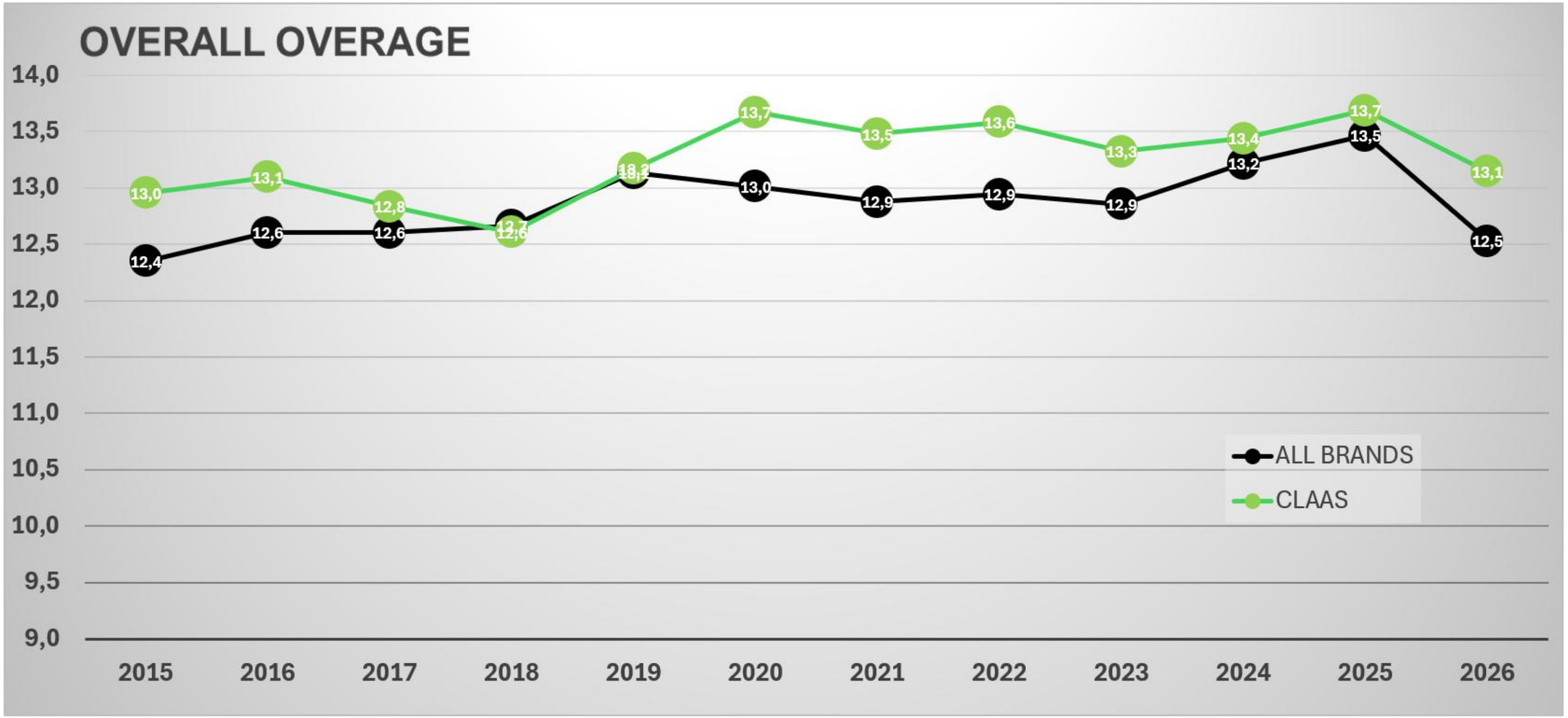


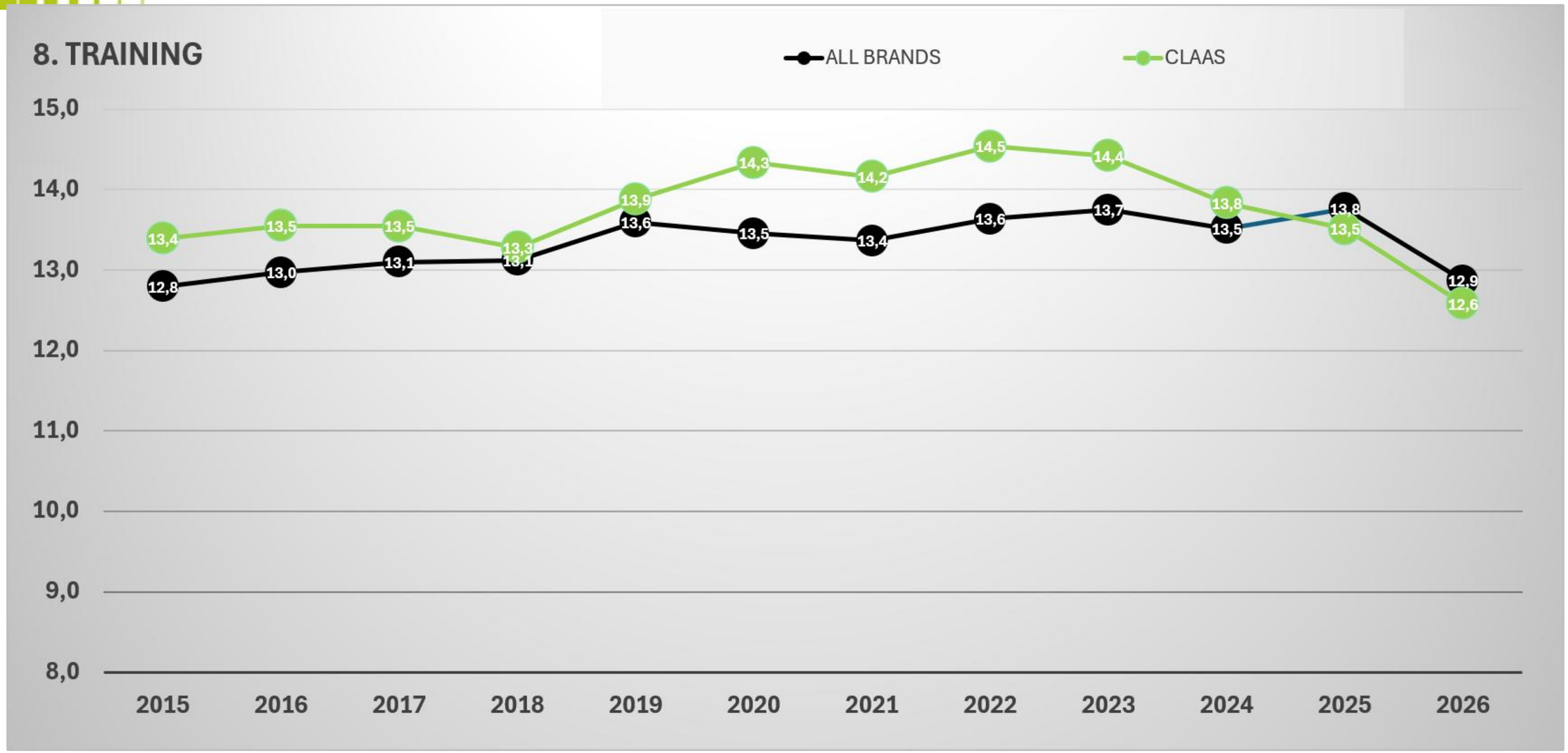
	1. BRAND IMAGE AND IMPACT	2. MARKETING OF TRACTORS	3. MARKETING OF SPARE PARTS	4. AFTER-SALES SERVICE AND WARRANTY	5. COMPUTER SERVICES	6. ADVERTISING AND PRODUCT SUPPORT MATERIAL	7. ADMINISTRATION AND TERMS OF PAYMENT	8. TRAINING	9. THE MANAGEMENT	10. MANUFACTURER-DEALER RELATIONS	11. PROFITABILITY CONTRIBUTION	12. IMPROVEMENTS	13. FINANCING OFFERS	14. BRAND IMAGE AND IMPACT (self-propelled)	15. MARKETING OF SELF-PROPELLED
Claas	15,0	12,3	13,6	14,1	13,0	13,1	13,0	12,6	13,8	13,5	10,9	13,0	8,4	17,8	13,7
Average all brands	14,2	11,9	13,2	13,3	11,9	11,9	13,1	12,9	13,0	13,2	11,4	11,6	10,4	14,4	11,3

EVOLUTION / 11 years

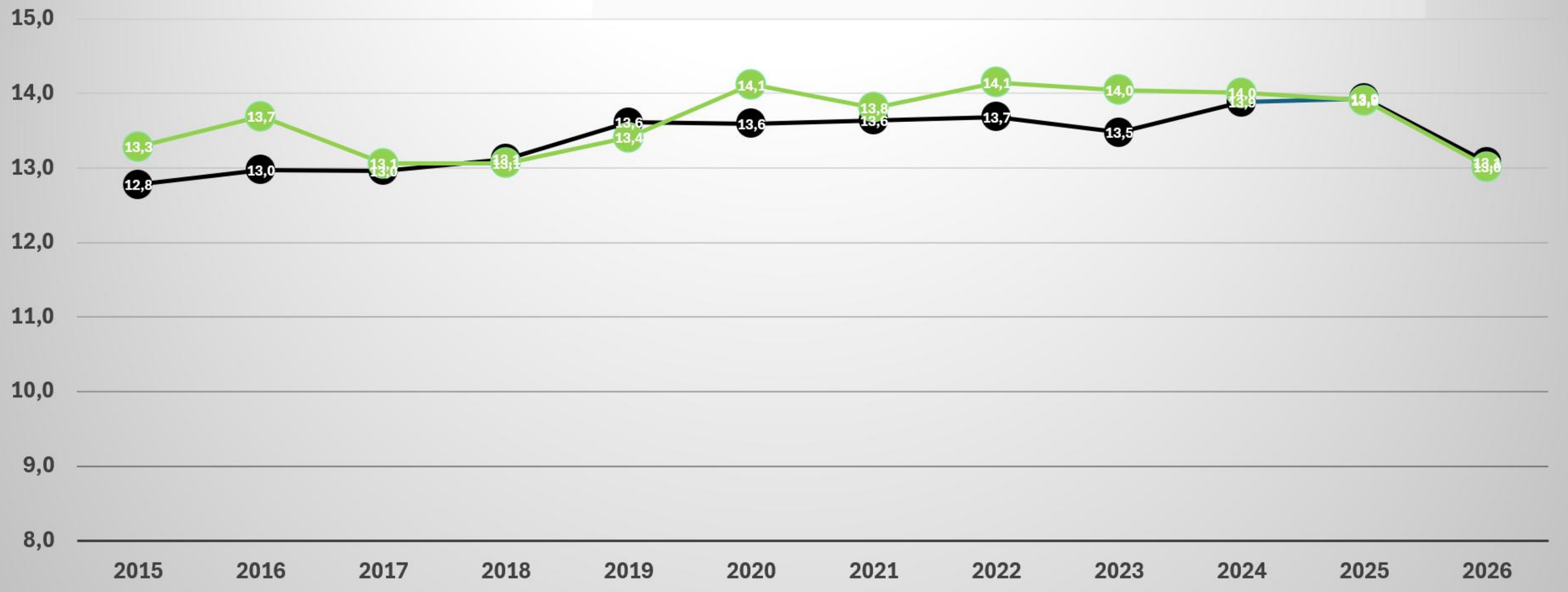


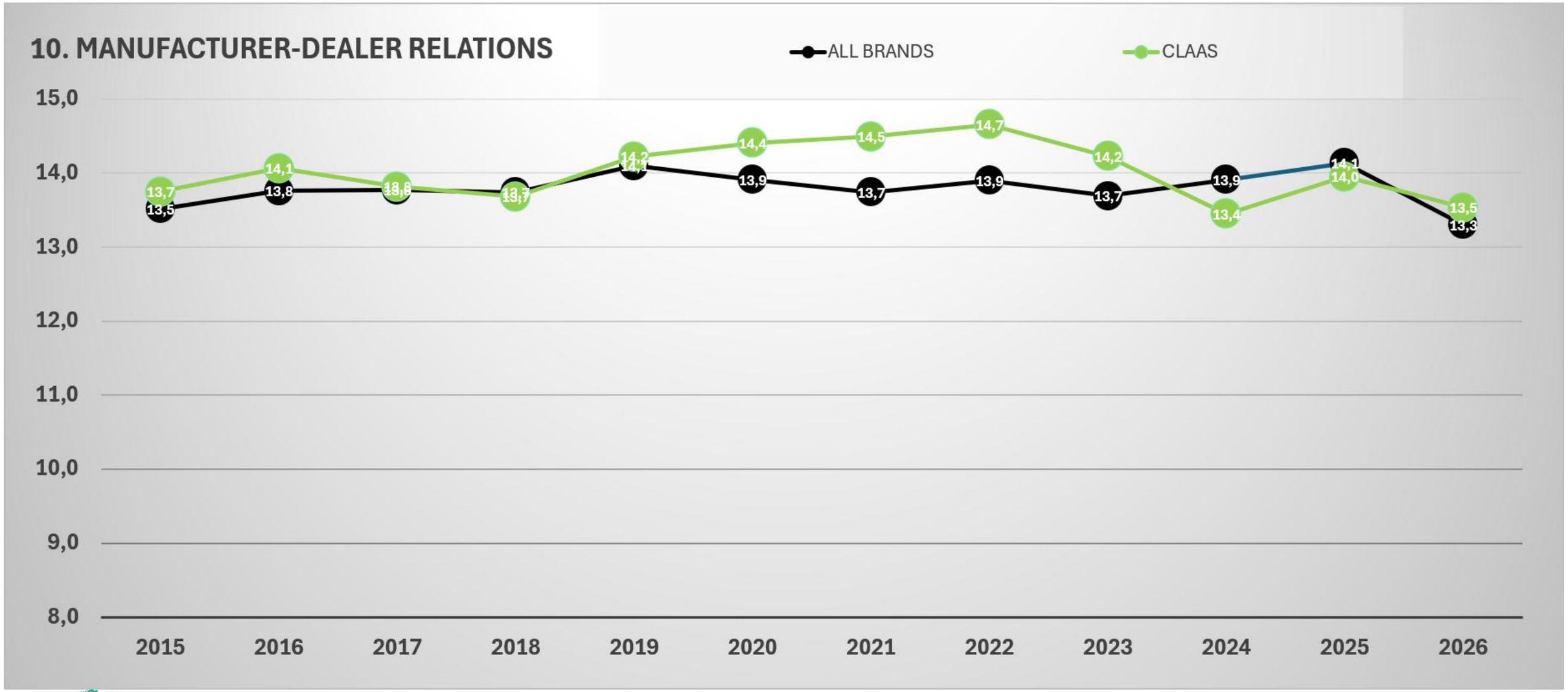


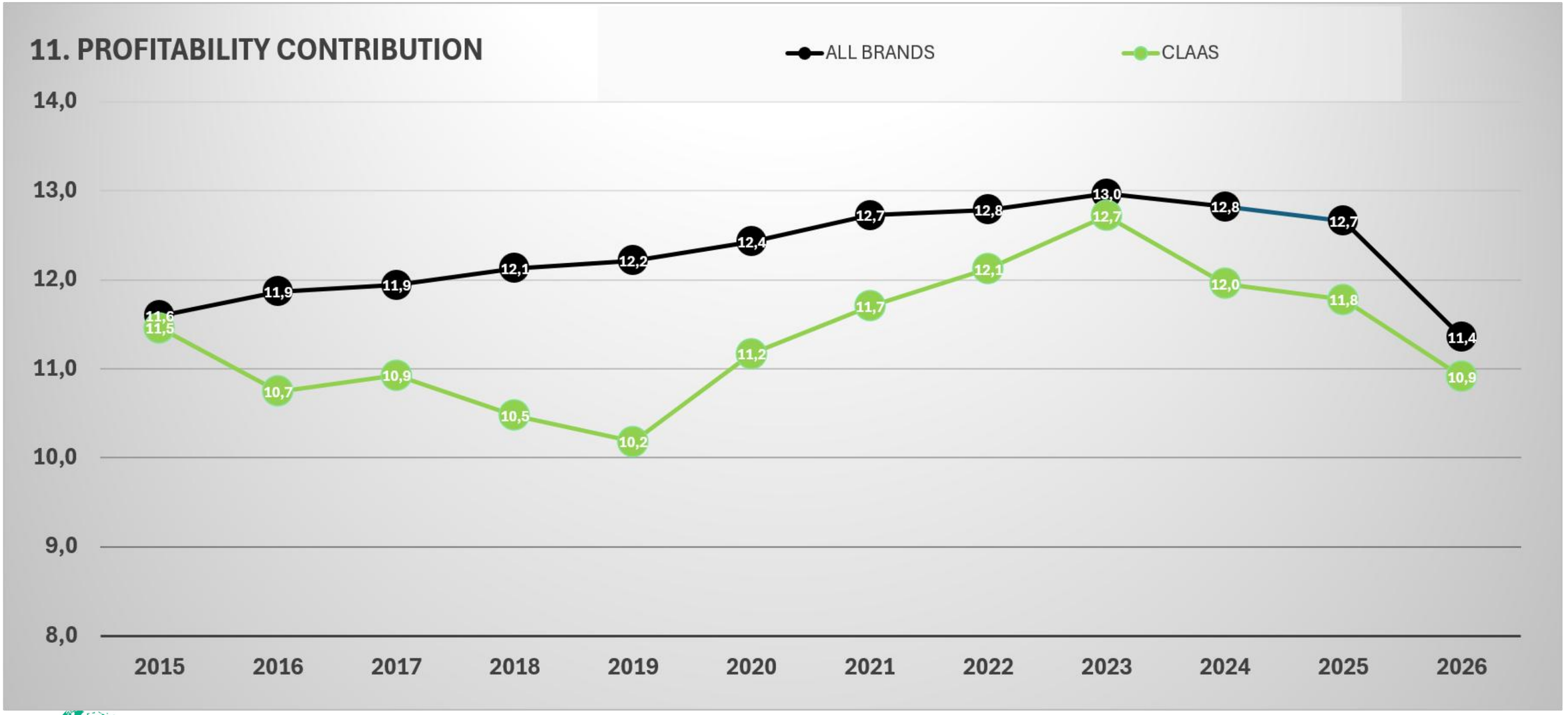

OVERALL OVERAGE
14,0
13,5
13,0
12,5
12,0
11,5
11,0
10,5
10,0
9,5
9,0
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
2026
13,0
13,1
12,8
12,6
13,7
13,5
13,6
13,3
13,4
13,7
13,1
12,4
12,6
12,6
12,7
13,0
13,0
12,9
12,9
12,9
13,2
13,5
12,5
ALL BRANDS
CLAAS


8. TRAINING
ALL BRANDS
CLAAS
15,0
14,0
13,0
12,0
11,0
10,0
9,0
8,0
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
2026
13,4
13,5
13,5
13,3
13,9
14,3
14,2
14,5
14,4
13,8
13,5
12,6
12,8
13,0
13,1
13,1
13,6
13,5
13,4
13,6
13,7
13,5
13,8
12,9

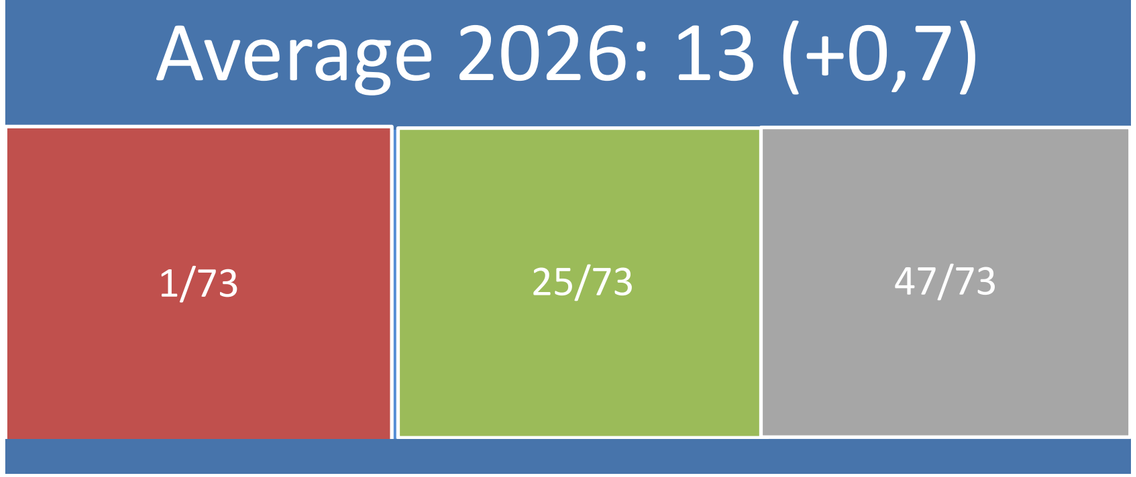
7. ADMINISTRATION AND TERMS OF PAYMENT




10. MANUFACTURER-DEALER RELATIONS
ALL BRANDS
CLAAS
15,0
14,0
13,0
12,0
11,0
10,0
9,0
8,0
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
2026
13,7
14,1
14,4
14,5
14,7
14,2
13,4
14,0
13,5
13,5
13,8
13,9
13,7
13,9
13,7
13,9
14,1
13,3


11. PROFITABILITY CONTRIBUTION
ALL BRANDS
CLAAS
14,0
13,0
12,0
11,0
10,0
9,0
8,0
11,6
11,9
11,9
12,1
12,2
12,4
12,7
12,8
13,0
12,8
12,7
11,4
11,5
10,7
10,9
10,5
10,2
11,2
11,7
12,1
12,7
12,0
11,8
10,9
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
2026

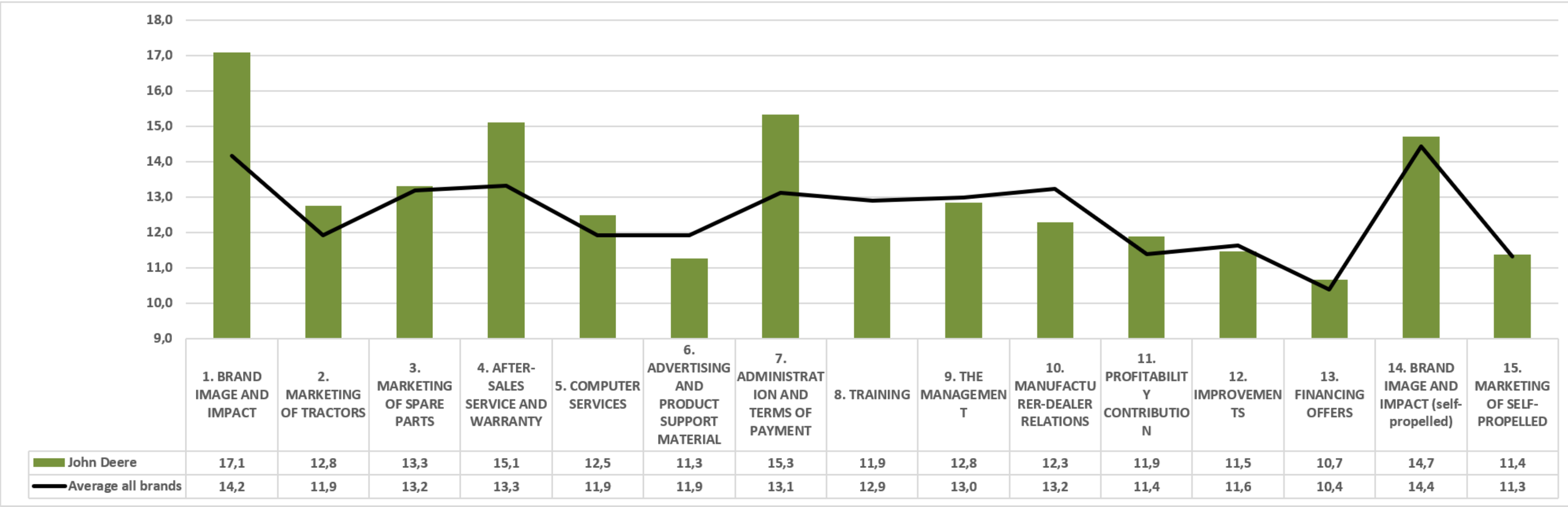
JOHN DEERE



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JOHN DEERE

Score 2026 for each heading compared with the overall average for all brands



	1. BRAND IMAGE AND IMPACT	2. MARKETING OF TRACTORS	3. MARKETING OF SPARE PARTS	4. AFTER-SALES SERVICE 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 OFFERS	14. BRAND IMAGE AND IMPACT (self-propelled)	15. MARKETING OF SELF-PROPELLED
John Deere	17,1	12,8	13,3	15,1	12,5	11,3	15,3	11,9	12,8	12,3	11,9	11,5	10,7	14,7	11,4
Average all brands	14,2	11,9	13,2	13,3	11,9	11,9	13,1	12,9	13,0	13,2	11,4	11,6	10,4	14,4	11,3

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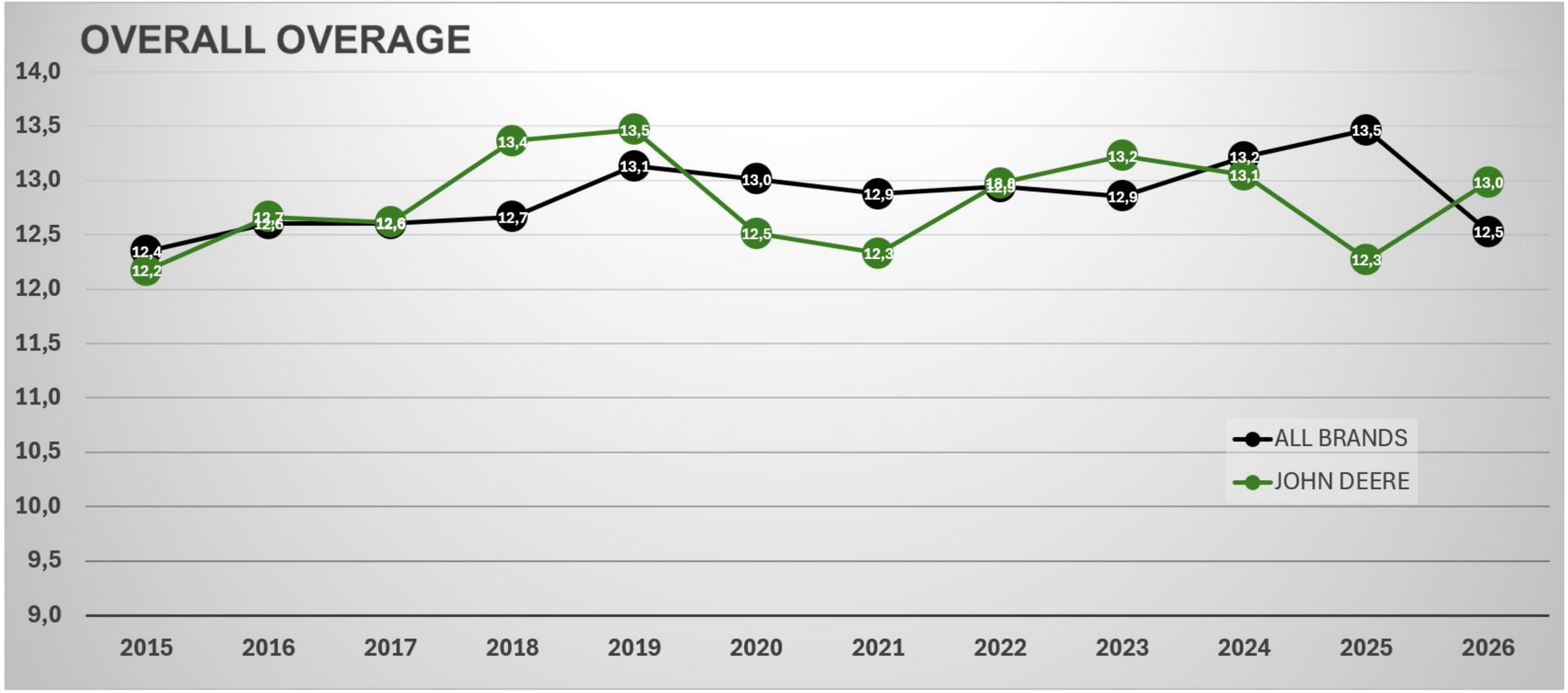
EVOLUTION / 11 years



JOHN DEERE

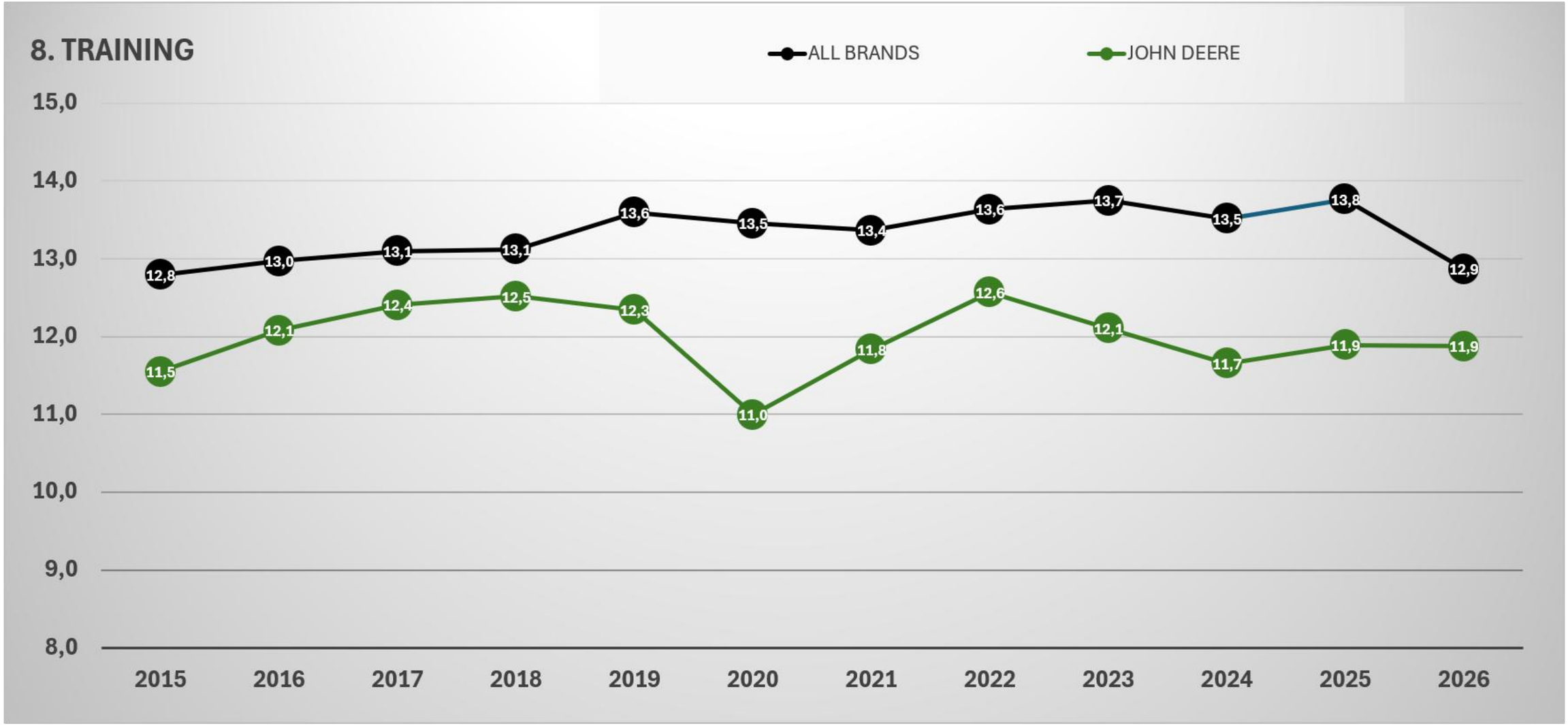
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JOHN DEERE



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

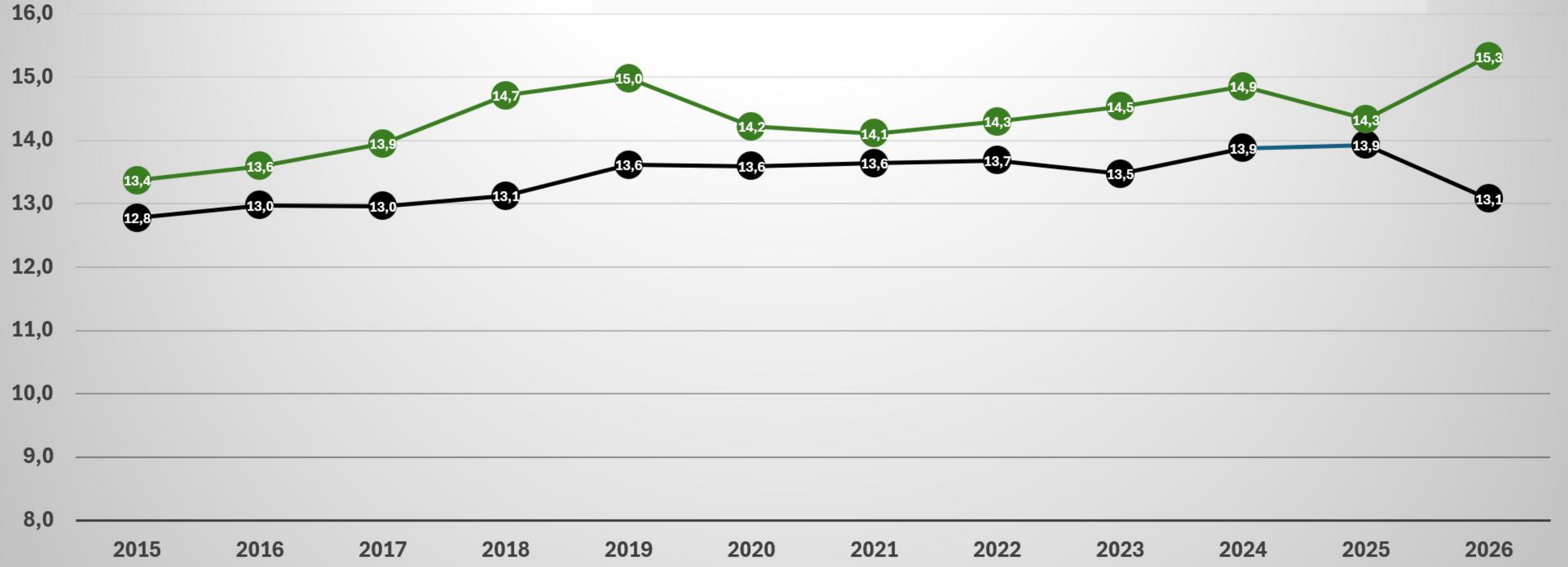
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JOHN DEERE

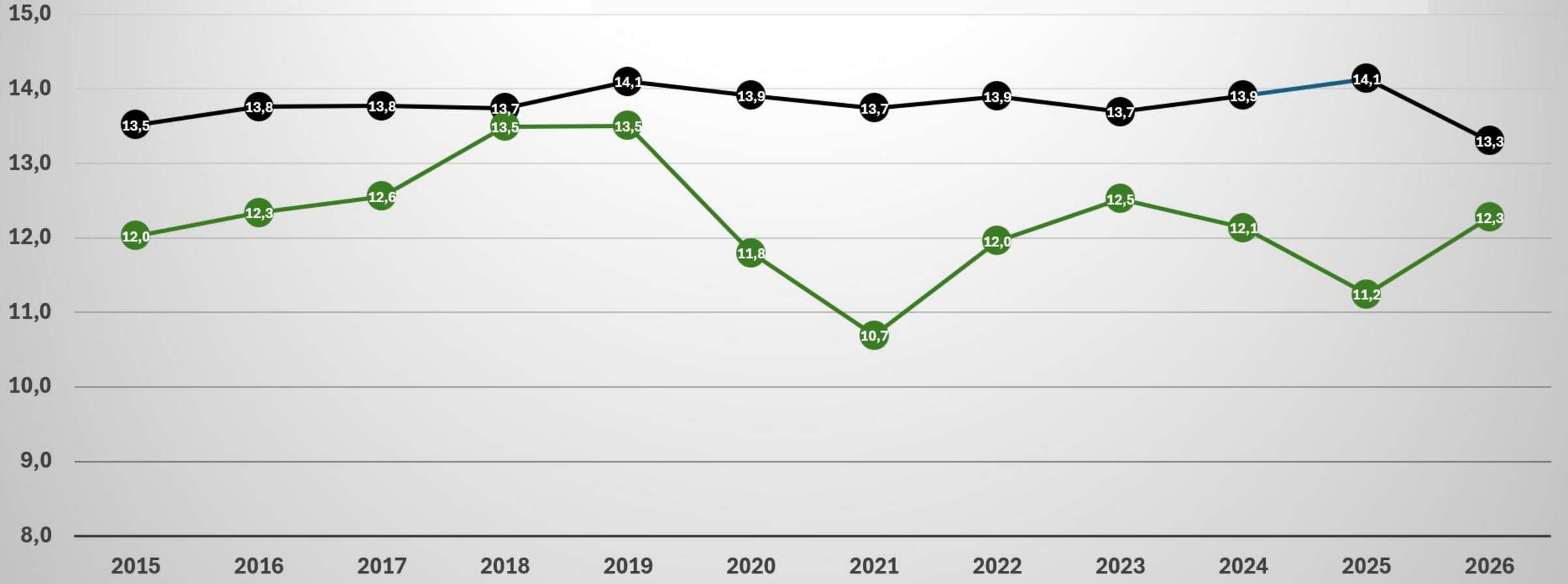
7. ADMINISTRATION AND TERMS OF PAYMENT



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

JOHN DEERE

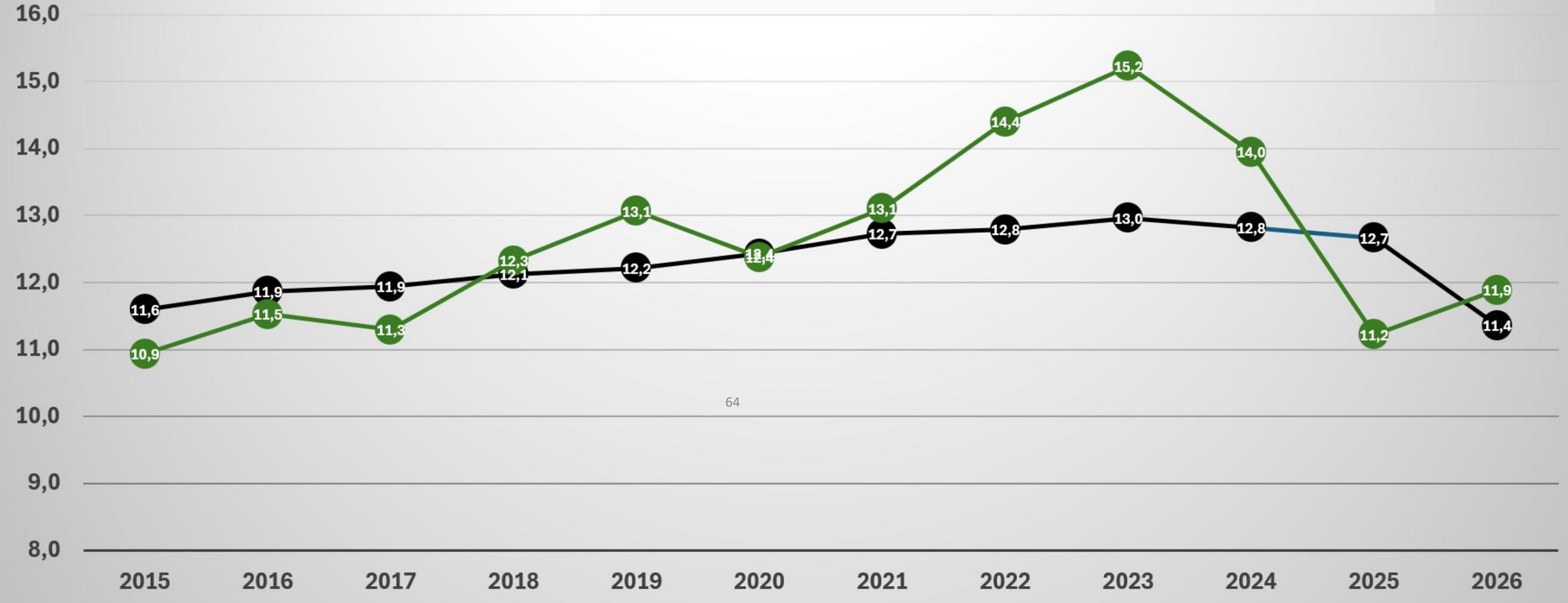
10. MANUFACTURER-DEALER RELATIONS



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JOHN DEERE

11. PROFITABILITY CONTRIBUTION

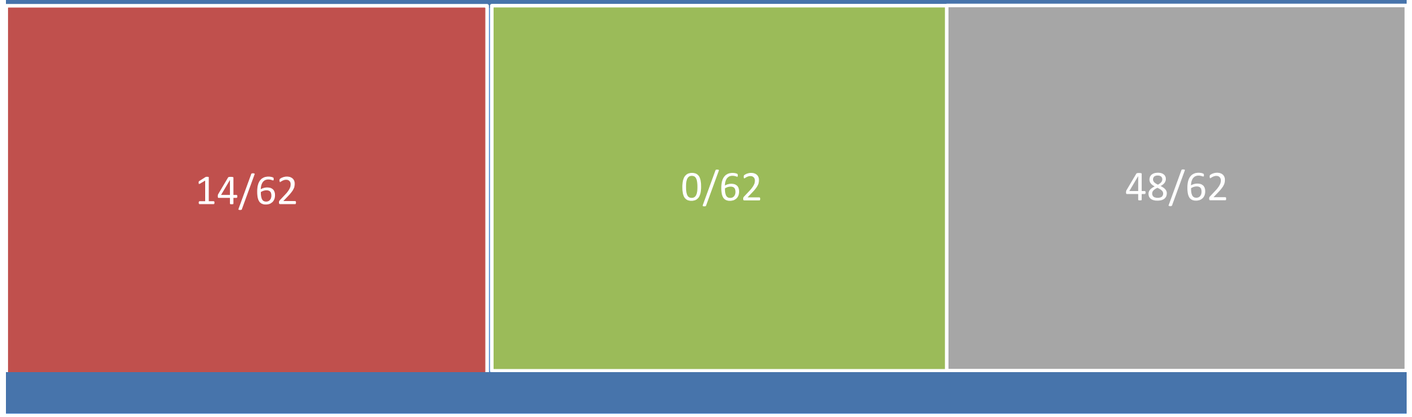


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International Confederation of National Associations of Dealers and Repairers of Agricultural and Gardening Machinery



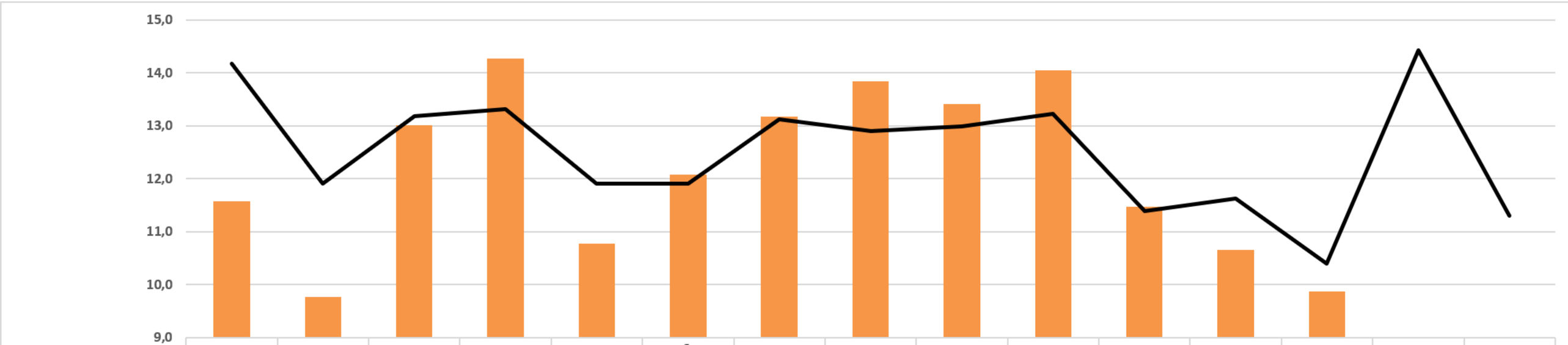


Average 2026: 12,2 (-0,7)



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Score 2026 for each heading compared with the overall average for all brands



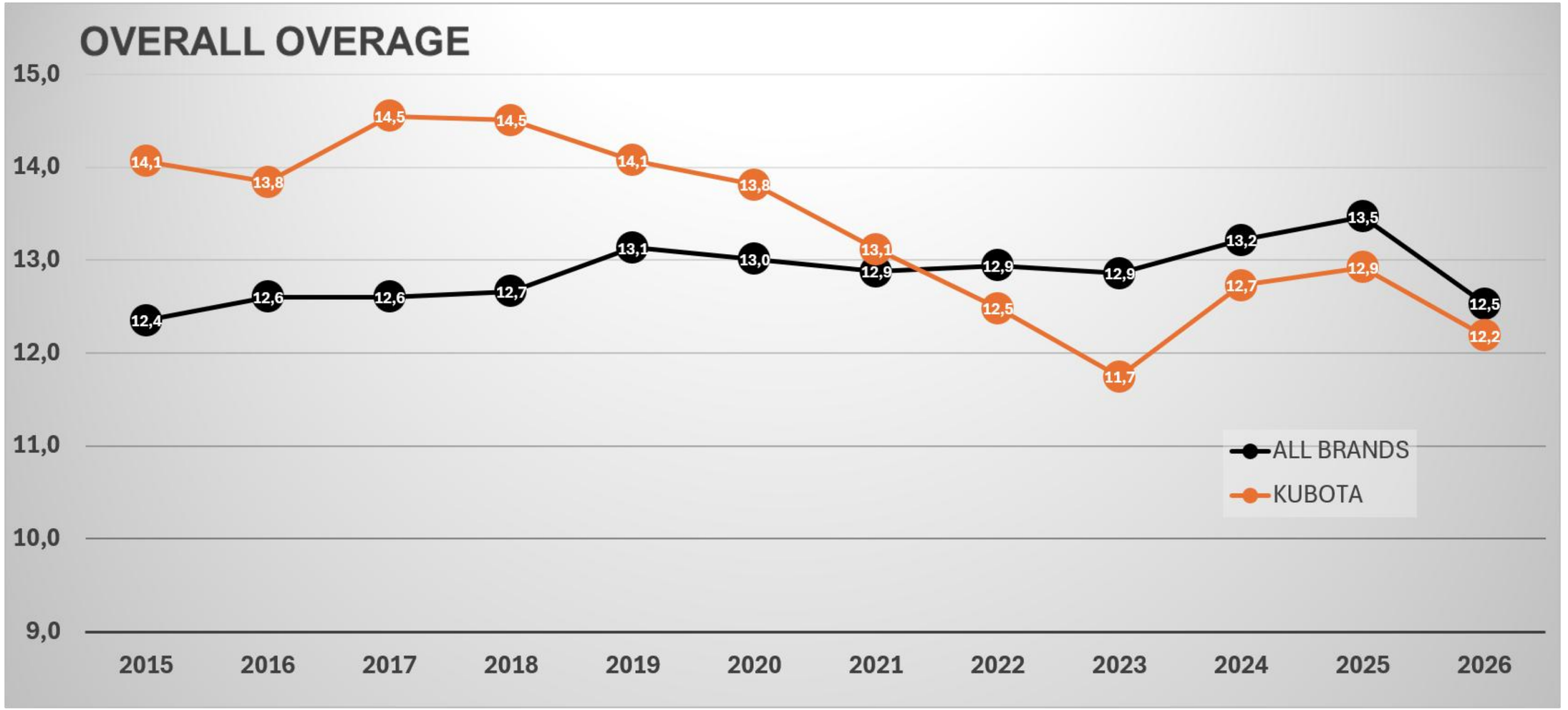
	1. BRAND IMAGE AND IMPACT	2. MARKETING OF TRACTORS	3. MARKETING OF SPARE PARTS	4. AFTER-SALES SERVICE AND WARRANTY	5. COMPUTER SERVICES	6. ADVERTISING AND PRODUCT SUPPORT MATERIAL	7. ADMINISTRATION AND TERMS OF PAYMENT	8. TRAINING	9. THE MANAGEMENT	10. MANUFACTURER-DEALER RELATIONS	11. PROFITABILITY CONTRIBUTION	12. IMPROVEMENTS	13. FINANCING OFFERS	14. BRAND IMAGE AND IMPACT (self-propelled)	15. MARKETING OF SELF-PROPELLED
Kubota	11,6	9,8	13,0	14,3	10,8	12,1	13,2	13,8	13,4	14,1	11,5	10,7	9,9	0,0	0,0
Average all brands	14,2	11,9	13,2	13,3	11,9	11,9	13,1	12,9	13,0	13,2	11,4	11,6	10,4	14,4	11,3

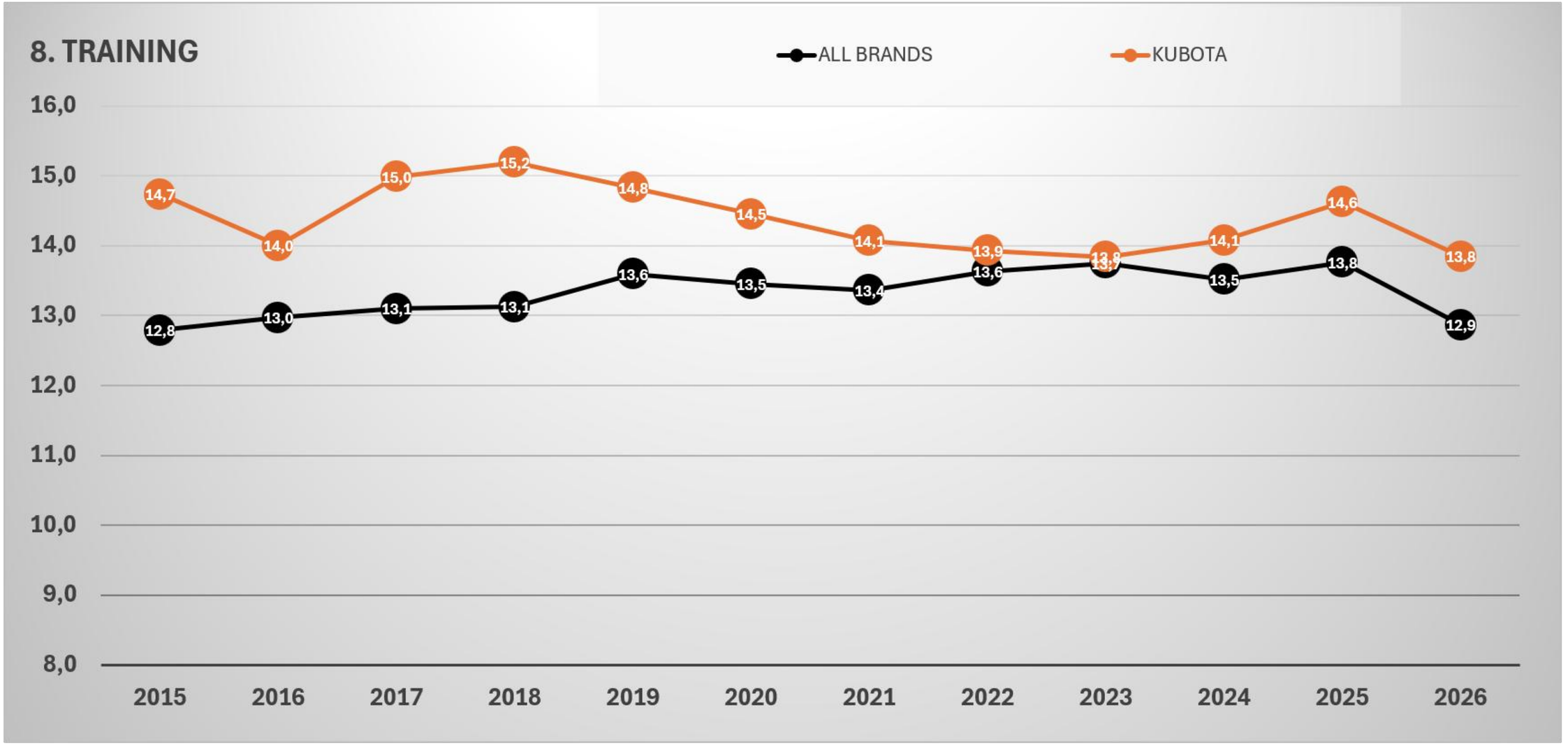
EVOLUTION / 11 years

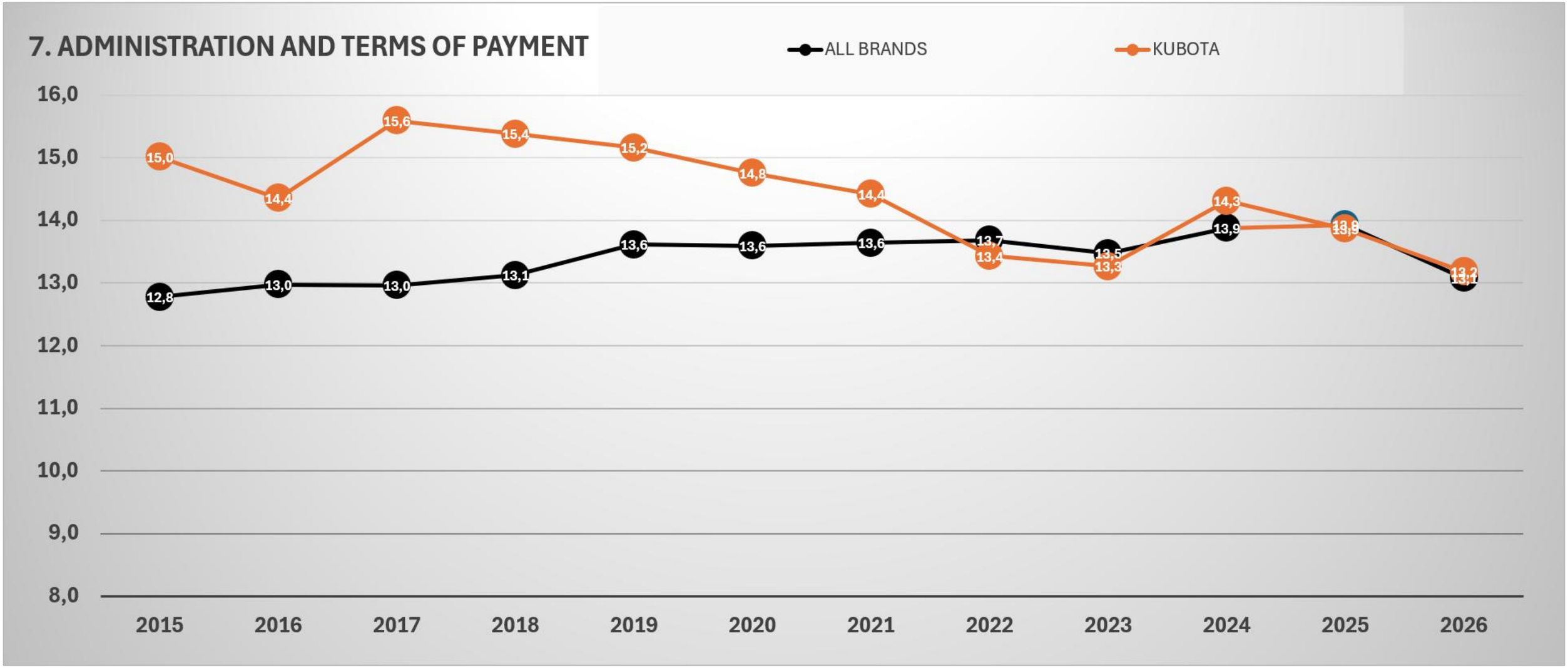


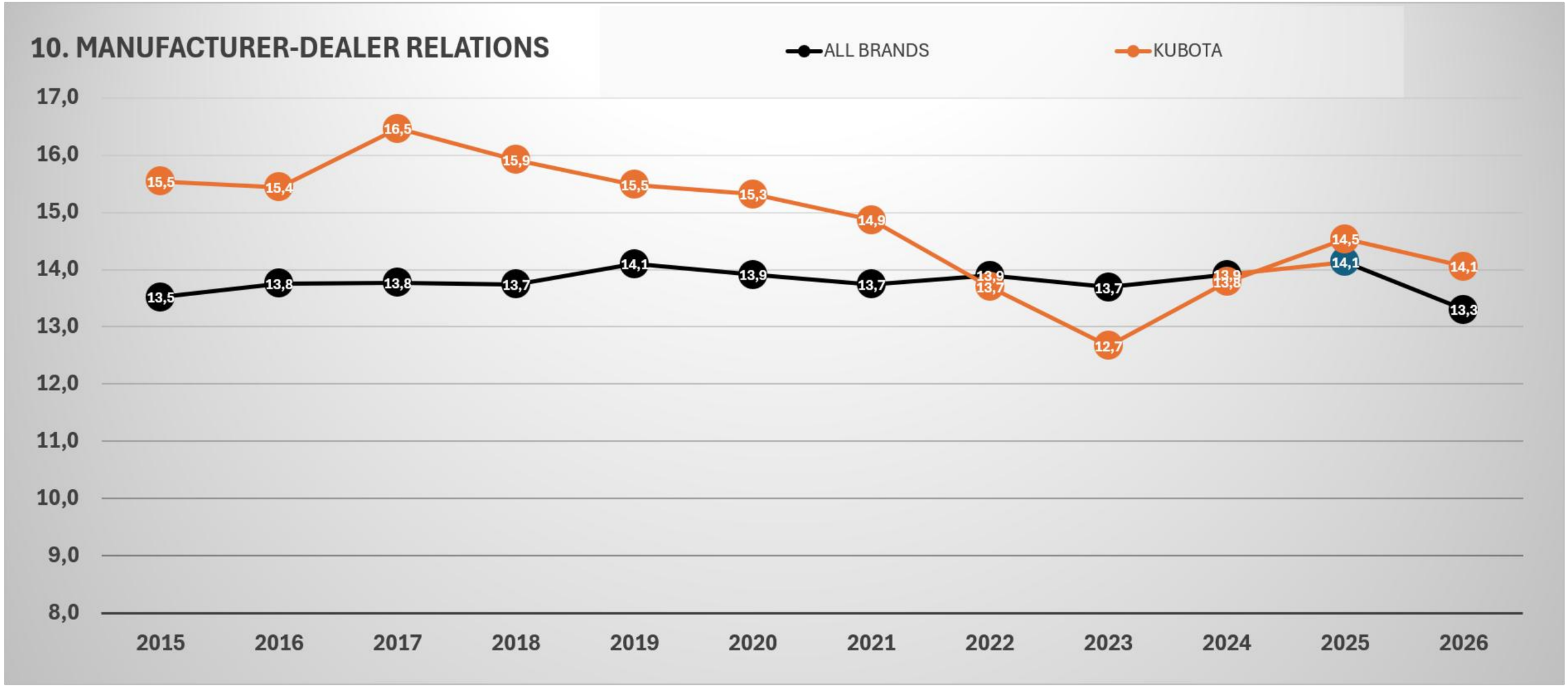
Kubota

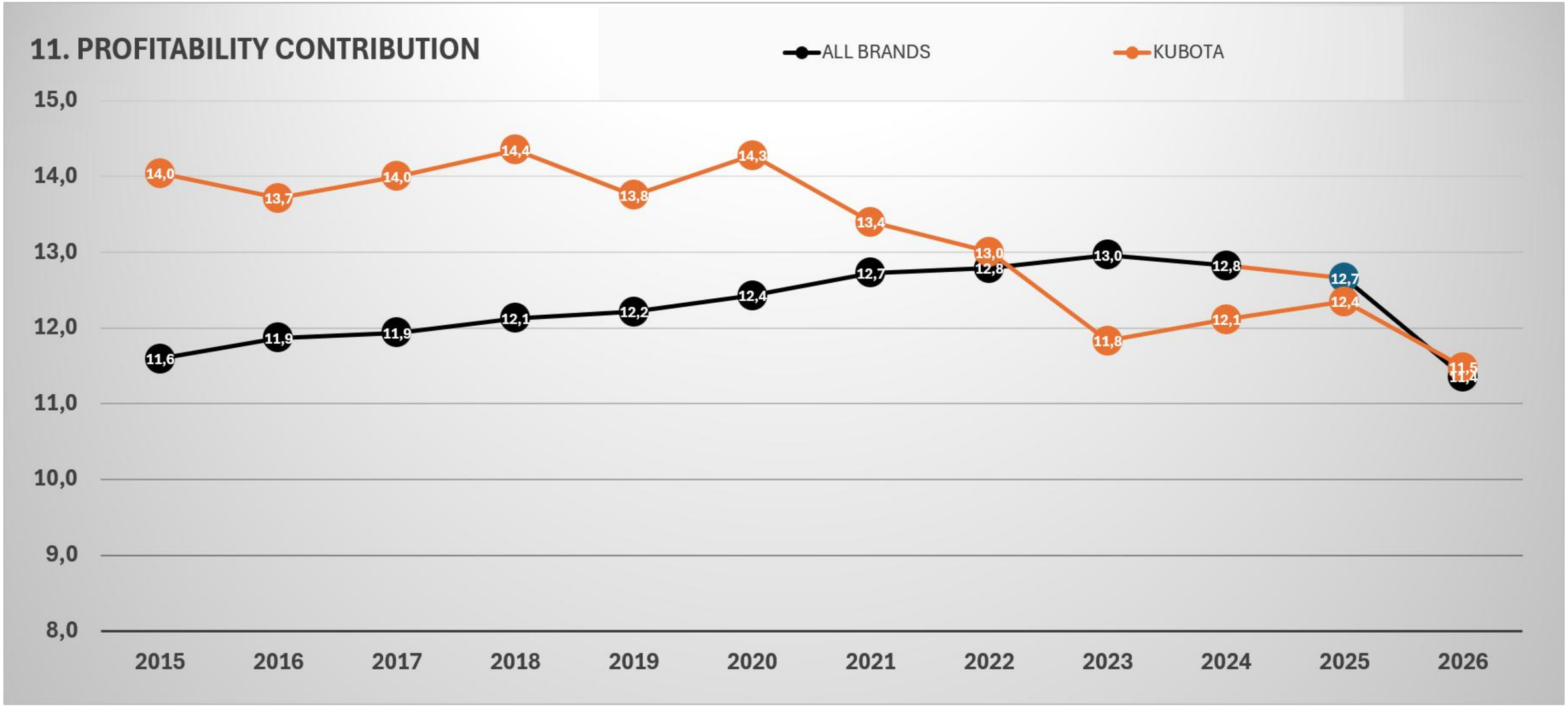
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International Confederation of National Associations of Dealers and Repairers of Agricultural and Gardening Machinery


OVERALL OVERAGE
15,0
14,0
13,0
12,0
11,0
10,0
9,0
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
2026
14,1
13,8
14,5
14,5
14,1
13,8
13,1
12,5
11,7
12,7
12,9
12,2
12,4
12,6
12,6
12,7
13,1
13,0
12,9
12,9
12,9
13,2
13,5
12,5
ALL BRANDS
KUBOTA


8. TRAINING
ALL BRANDS
KUBOTA
16,0
15,0
14,0
13,0
12,0
11,0
10,0
9,0
8,0
14,7
14,0
15,0
15,2
14,8
14,5
14,1
13,9
13,8
14,1
14,6
13,8
12,8
13,0
13,1
13,1
13,6
13,5
13,4
13,6
13,8
13,5
13,8
12,9
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
2026


7. ADMINISTRATION AND TERMS OF PAYMENT
ALL BRANDS
KUBOTA
16,0
15,0
14,0
13,0
12,0
11,0
10,0
9,0
8,0
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
2026
15,0
14,4
15,6
15,4
15,2
14,8
14,4
13,4
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13,9
13,2
12,8
13,0
13,0
13,1
13,6
13,6
13,6
13,7
13,5
13,9
13,1

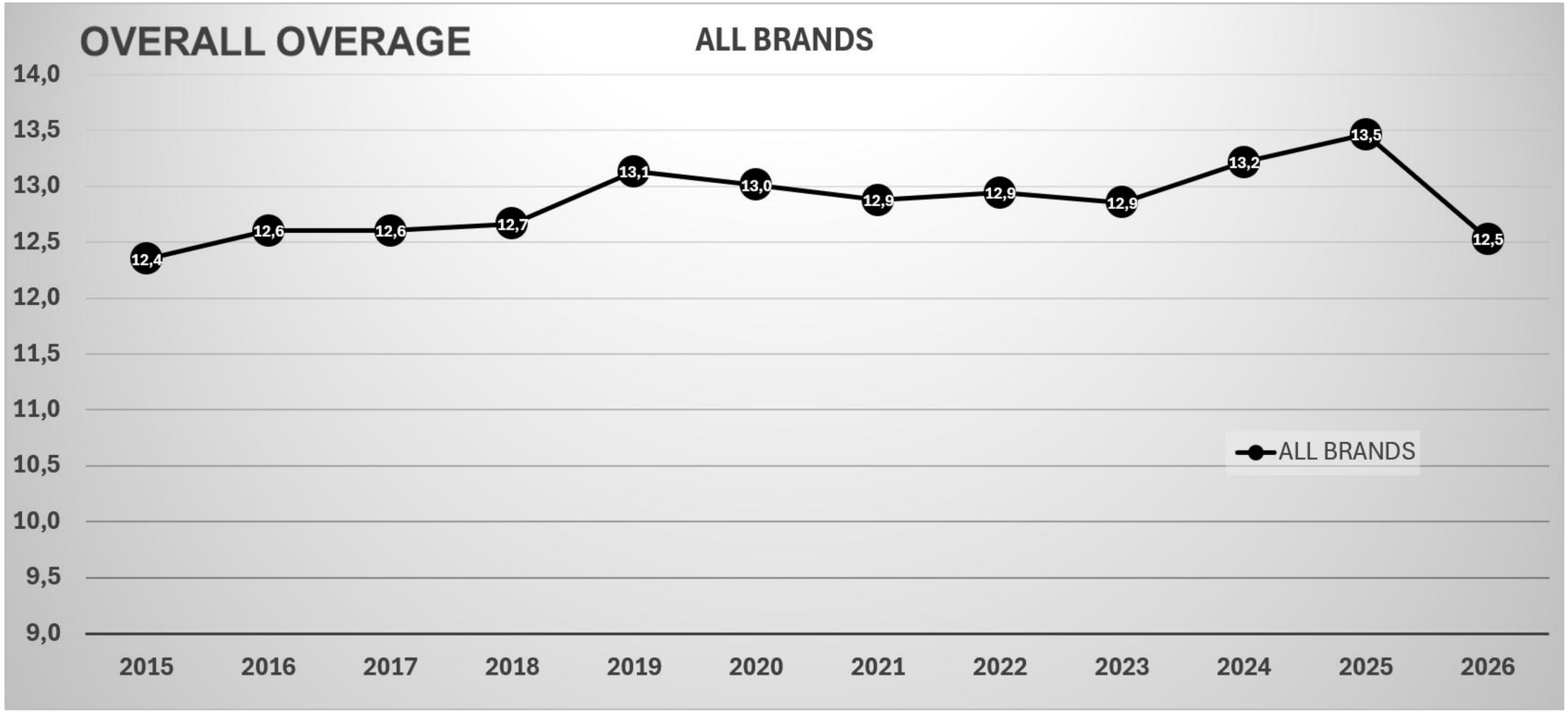

10. MANUFACTURER-DEALER RELATIONS
ALL BRANDS
KUBOTA
17,0
16,0
15,0
14,0
13,0
12,0
11,0
10,0
9,0
8,0
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
2026
15,5
15,4
16,5
15,9
15,5
15,3
14,9
13,7
12,7
13,8
14,5
14,1
13,5
13,8
13,8
13,7
14,1
13,9
13,7
13,9
13,7
13,8
14,1
13,3


11. PROFITABILITY CONTRIBUTION
ALL BRANDS
KUBOTA
15,0
14,0
13,0
12,0
11,0
10,0
9,0
8,0
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
2026
14,0
13,7
14,0
14,4
13,8
14,3
13,4
13,0
11,8
12,1
12,4
11,5
11,6
11,9
11,9
12,1
12,2
12,4
12,7
12,8
13,0
12,8
12,7
11,4

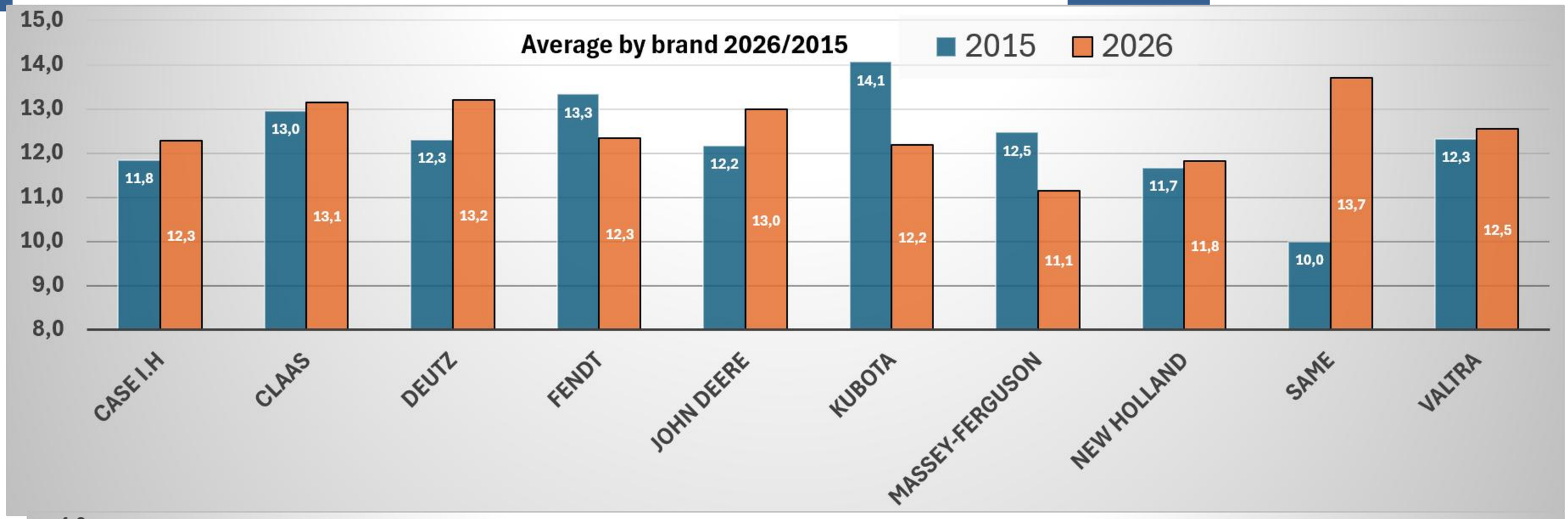
IV. Conclusion

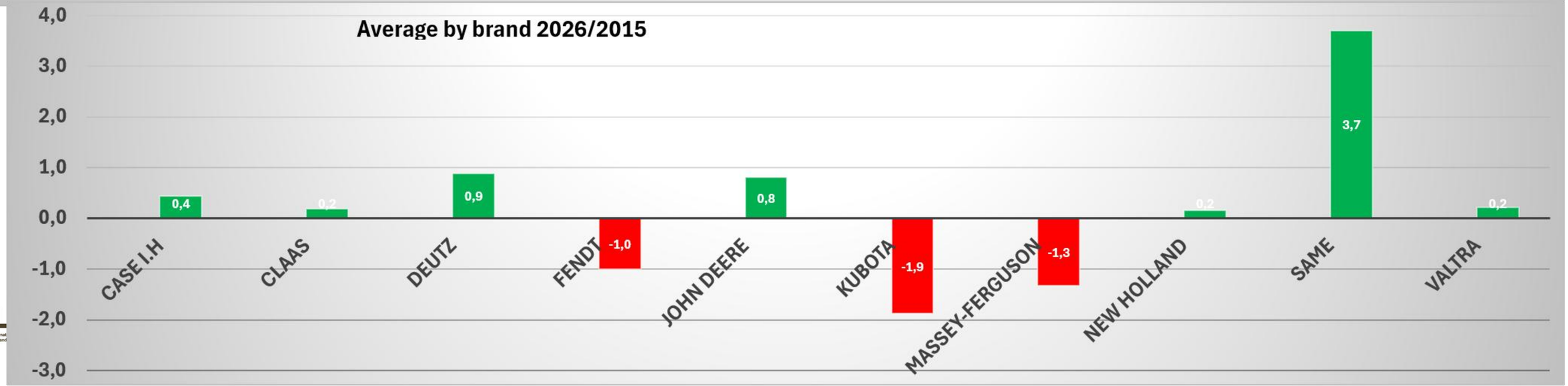


Overview of the 12-years average across all brands



Overview of the 12-years average across all brands





THANK YOU

Have any question?

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