WELCOME TO CLIMMAR!
THE INTERNATIONAL DEALERSHIP NETWORK OF 16 NATIONAL ASSOCIATIONS AND THEIR MEMBER COMPANIES IN THE AGRICULTURAL MACHINERY AND EQUIPEMENT SECTOR

16 Members and counting!
18.864 Dealers and counting!
154.950 Dealers employees
3.487.911 Farmers
1.942.149.220 ha. in total

CLIMMAR Press Conference 2017

Introduction to the highlights of CLIMMAR-activities in 2017

Changes in the CLIMMAR Board

Goodbye to:

Vice President Ulf Kopplin

Welcome to:

Vice-President Ludger Gude

New CLIMMAR Board

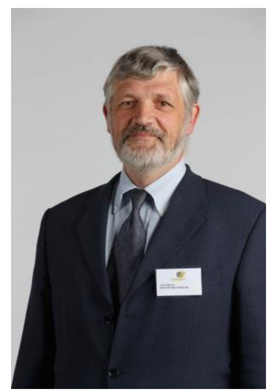
President : Erik Hogervorst

Vice President : Joost Merckx

Vice President : Ludger Gude

General Secretary : Jelle Bartlema

ERIK



JOOST

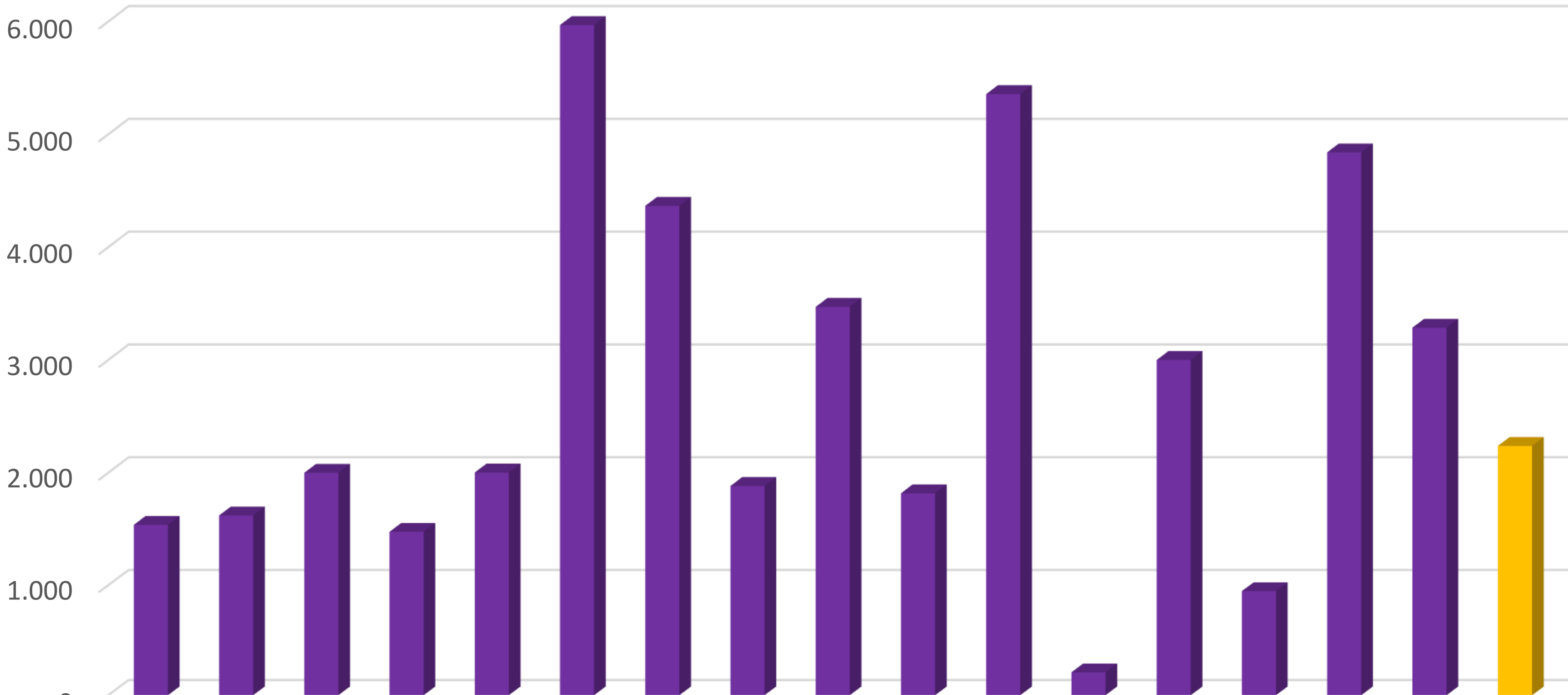
LUDGER

JELLE

The CLIMMAR Branch Reports

"Strenghten the position and profitability of European agromachinery-dealers"

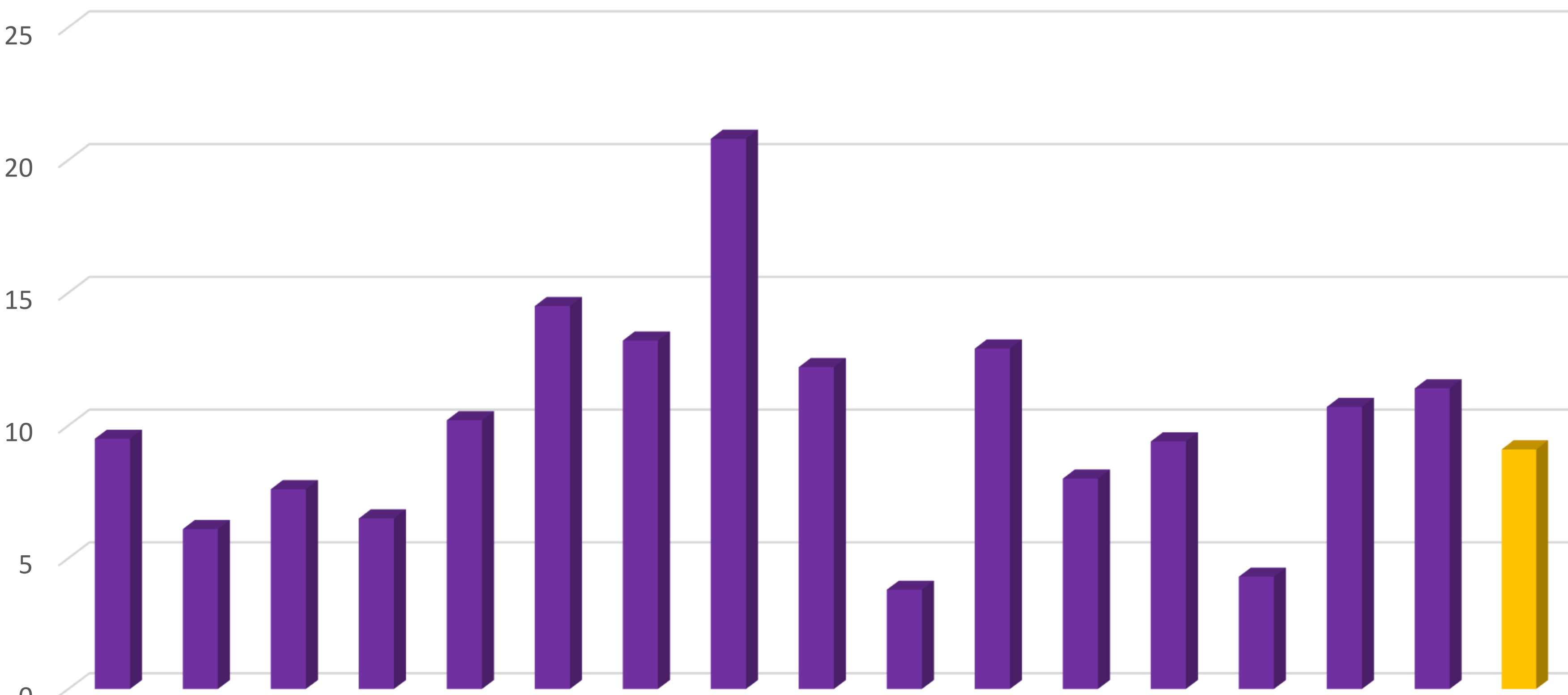
Turnover per Company (x 1.000)



	A	B	CH	CZ	D	DK	F	GB	H	I	L	LV	NL	PL	S	SK	Clim mar
tover./comp.	1.538	1.621	2.000	1.476	2.002	5.969	4.366	1.883	3.471	1.818	5.357	208	3.000	946	4.840	3.286	2.238

Source: CLIMMAR

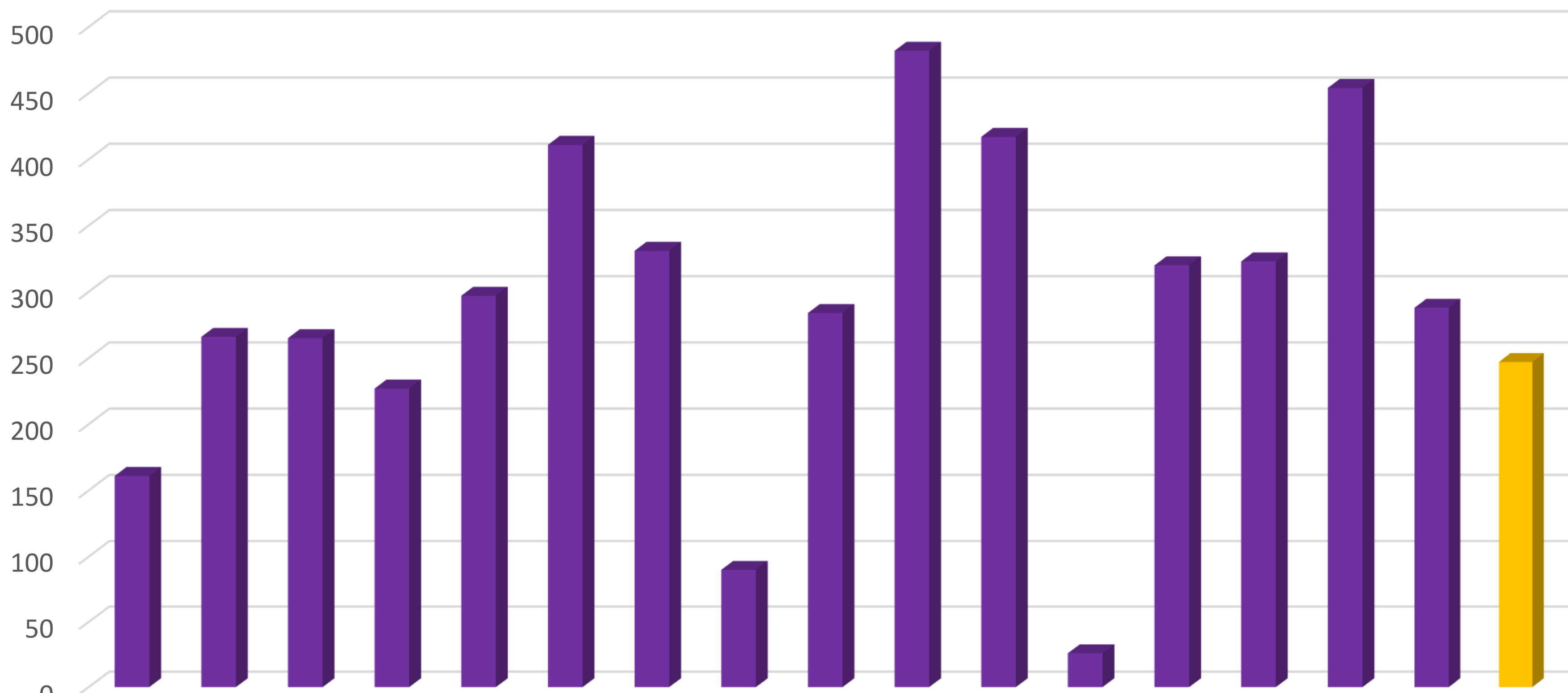
Employees per Company



	A	B	CH	CZ	D	DK	F	GB	H	I	L	LV	NL	PL	S	SK	Climmar
empl./comp.	9,5	6,1	7,6	6,5	10,2	14,5	13,2	20,8	12,2	3,8	12,9	8	9,4	4,3	10,7	11,4	9,1

Source: CLIMMAR

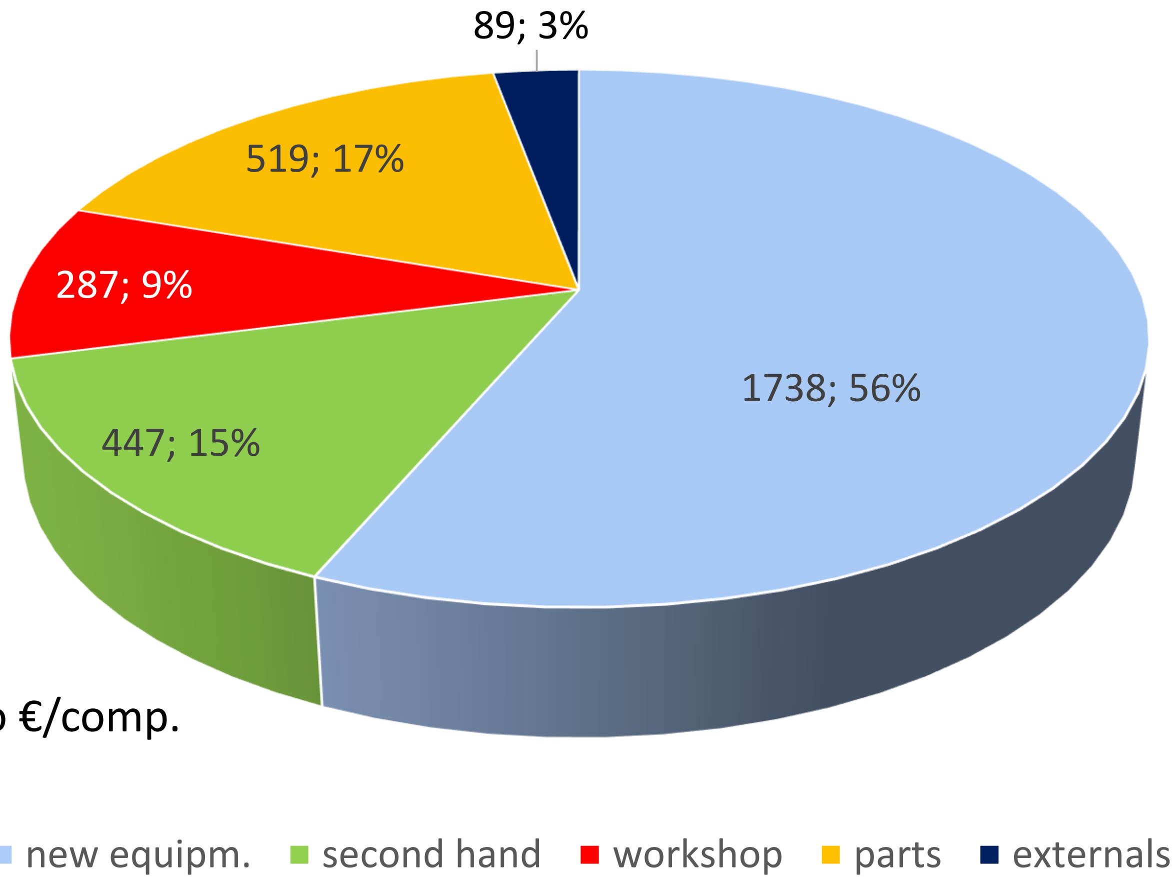
Turnover per Employee (x 1.000)



	A	B	CH	CZ	D	DK	F	GB	H	I	L	LV	NL	PL	S	SK	Climmar
t.over/empl.	161	266	265	227	297	411	331	90	284	482	417	26	320	323	454	288	247

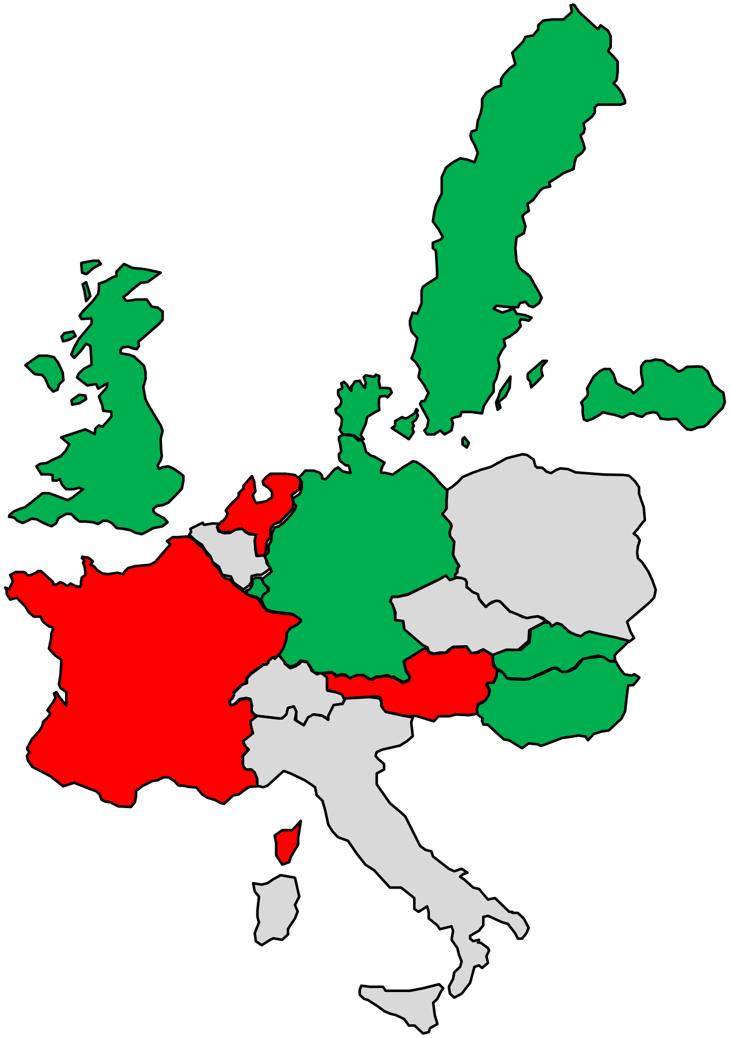
Source: CLIMMAR

turnover-structure of the average CLIMMAR-dealer



total:
3.080.ooo €/comp.

Source: CLIMMAR



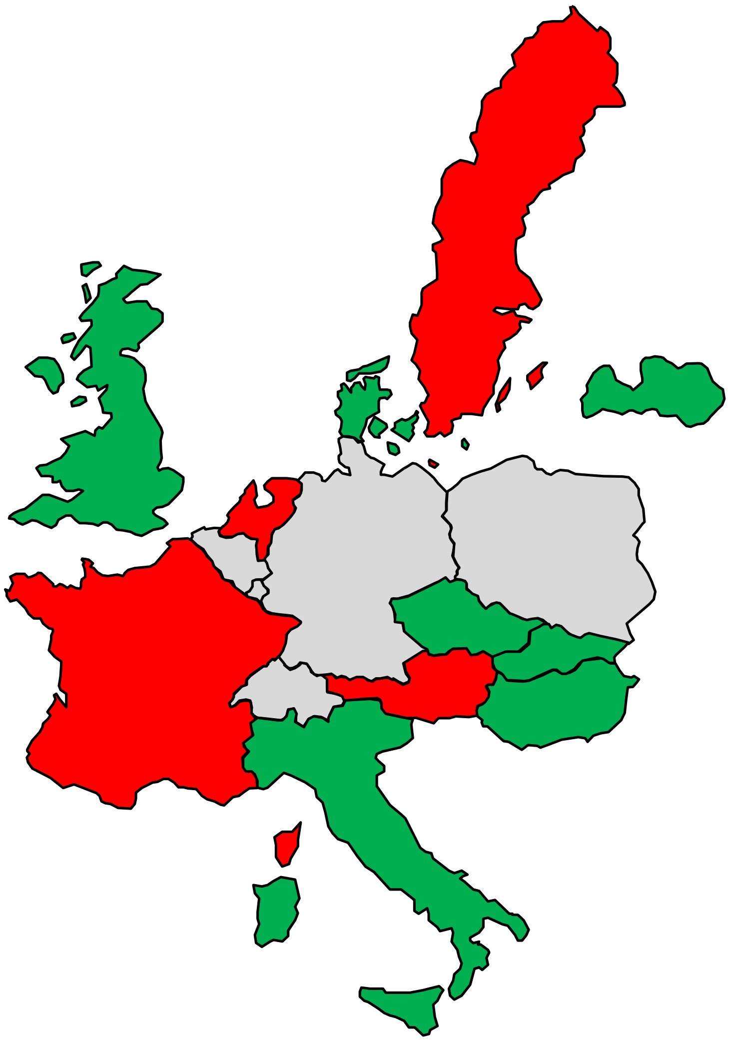
Turnover total

development of turnover in the first half of 2017 compared with the same period 2016:

- less / worse /decrease
- equal
- more / growing / increase

Source: CLIMMAR

Trends:

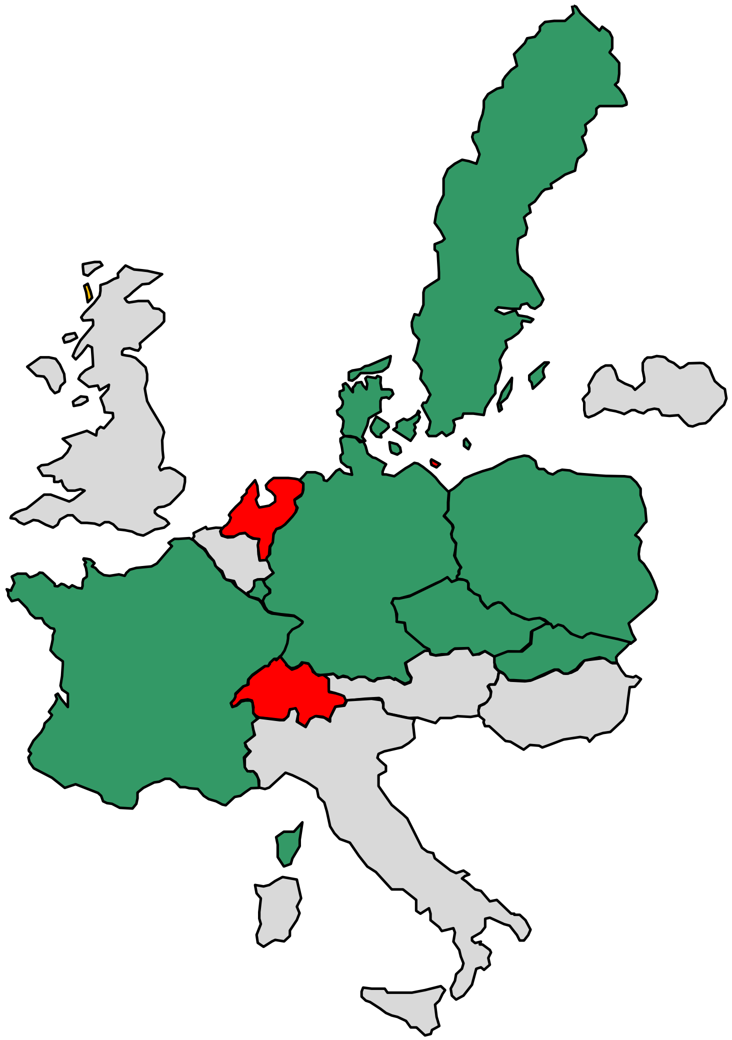


Turnover new equipment

development of turnover in the first half of 2017 compared with the same period 2016:

- less / worse /decrease
- equal
- more / growing / increase

Source: CLIMMAR



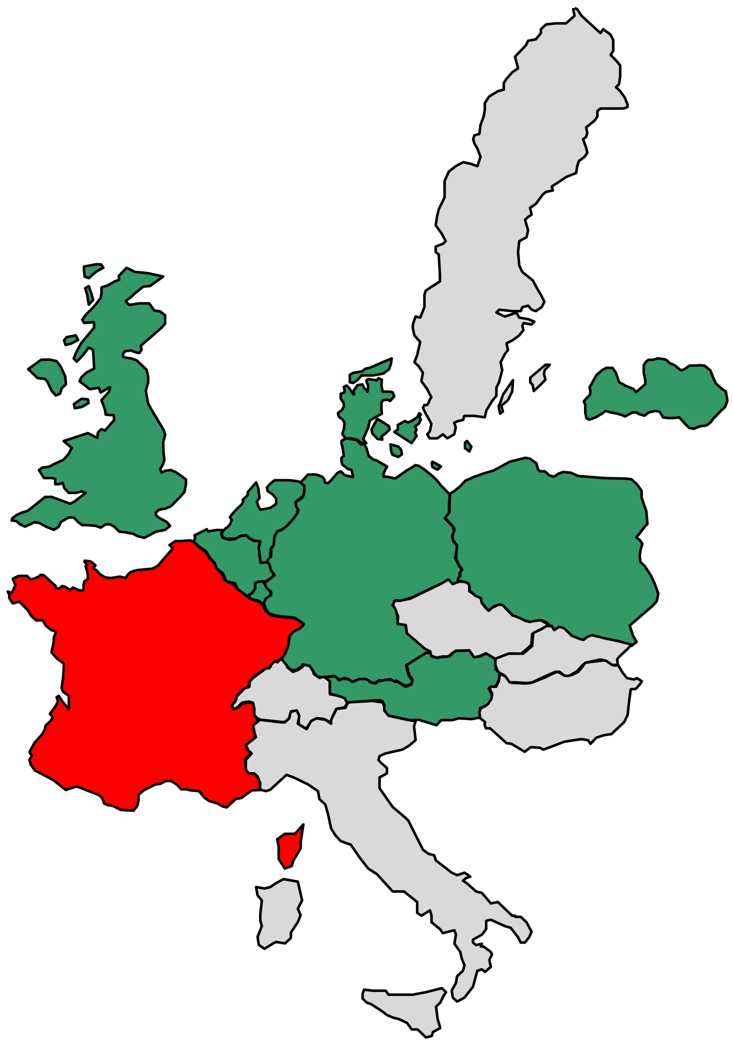
Turnover workshop

development of turnover in the first half of 2017 compared with the same period 2016:

- less / worse /decrease
- equal
- more / growing / increase
- open

Source: CLIMMAR

Trends:



Turnover total

Expectations for the current half of 2017

- less / worse /decrease
- equal
- more / growing / increase

Source: CLIMMAR

European Dealer Satisfaction Index

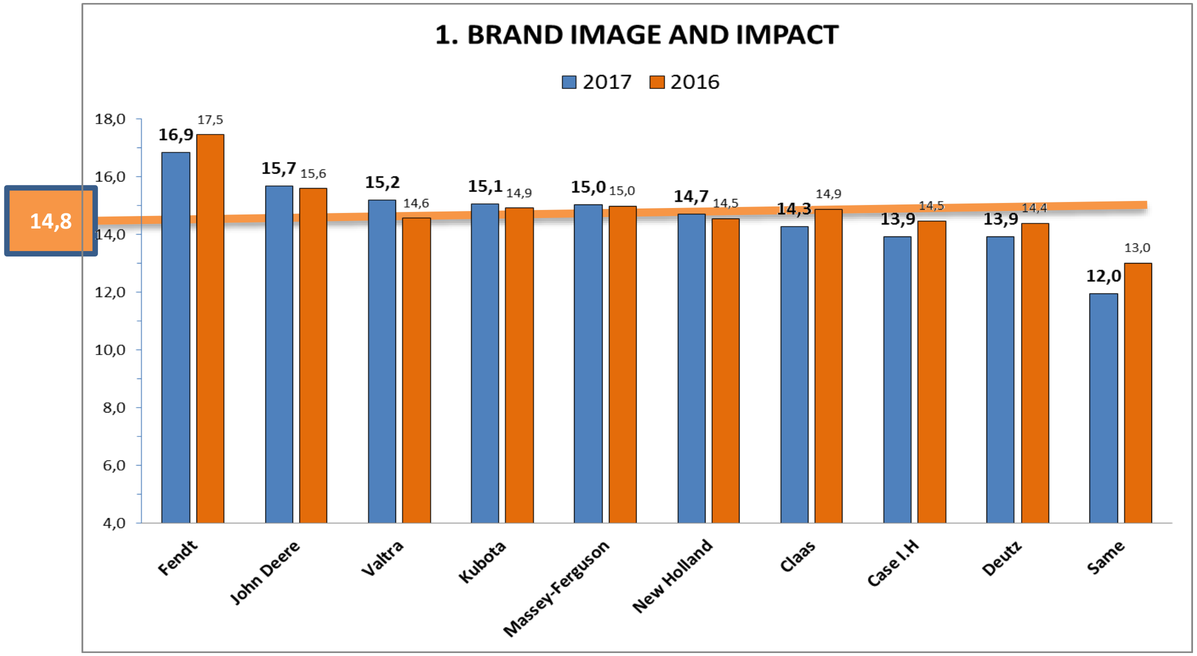
2017

Participation

Countries	2016	2017	diff/2016	%
Belgium	63	58	-5	-8%
Denmark	93	81	-12	-13%
France	280	307	27	10%
Germany	285	274	-11	-4%
Italy	143	181	38	27%
Poland	42	32	-10	-24%
The Netherlands	149	146	-3	-2%
United Kingdom	150	79	-71	-47%
Total	1205	1158	-47	-4%

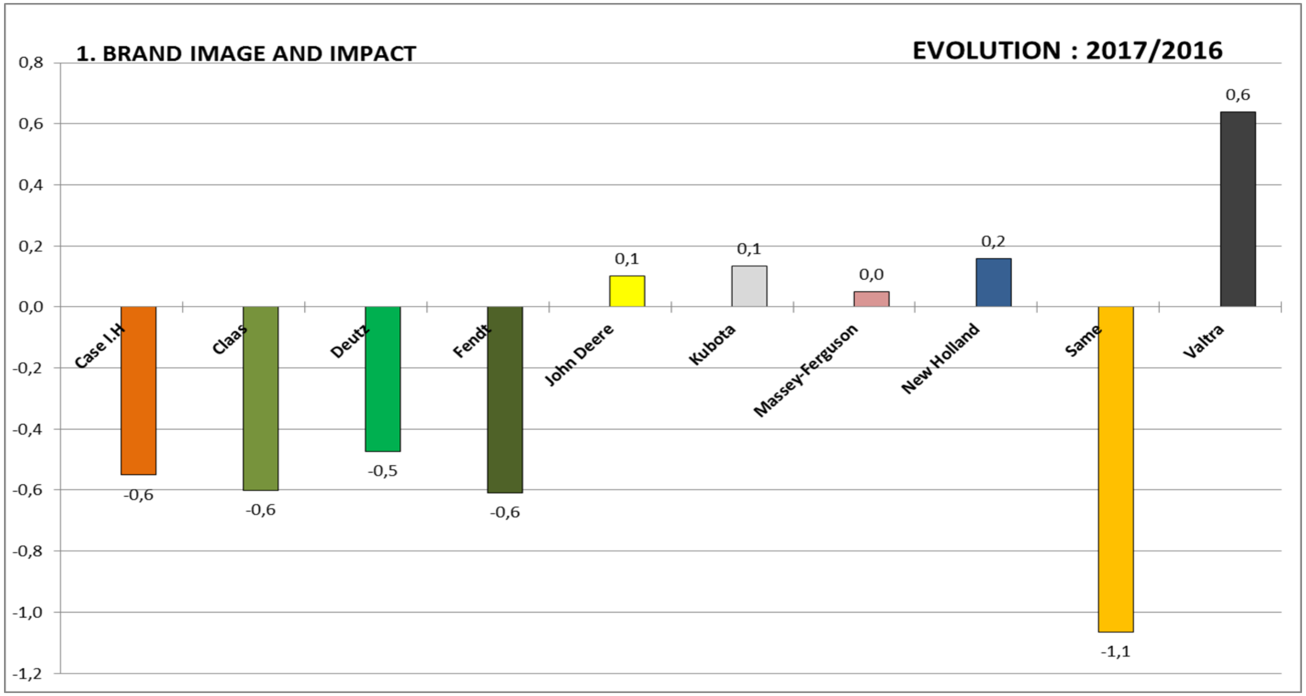
RESULTS BY MAIN CATEGORY AND WITH EVOLUTION 2016 / 2017:

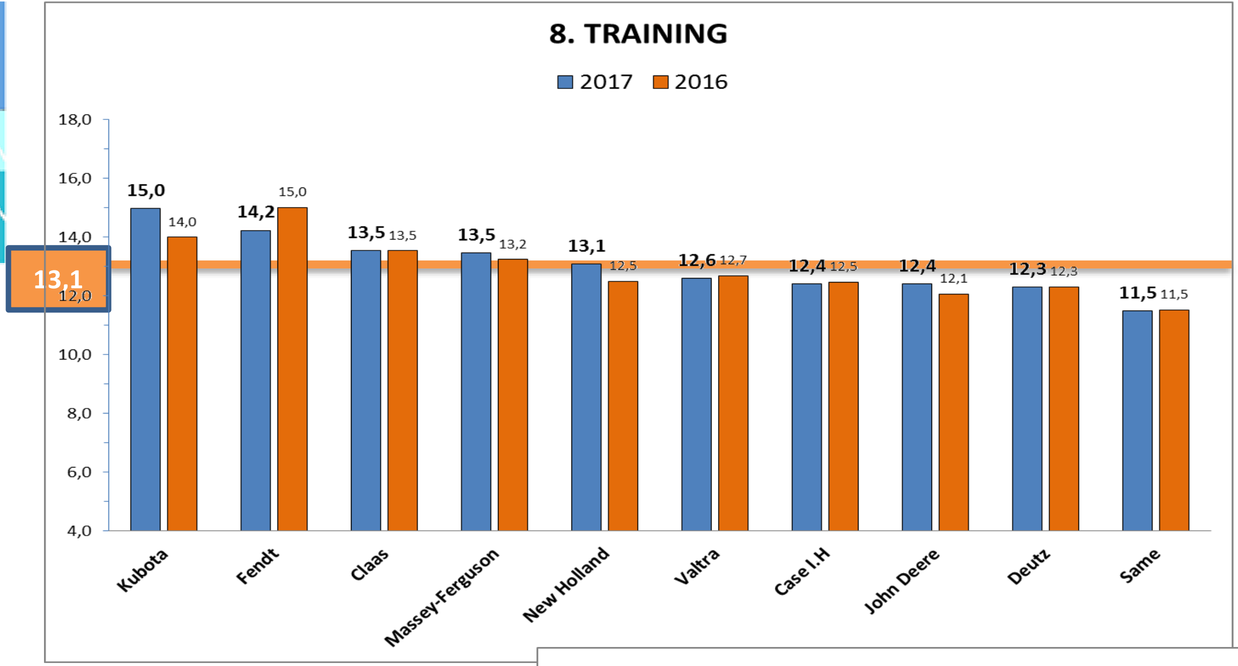
1: BRAND IMAGE AND IMPACT
2: MARKETING OF TRACTORS
3: MARKETING OF SPARE PARTS
4: AFTERSALES SERVICES AND WARRANTY
5: COMPUTER SERVICES
6: ADVERTISING AND PRODUCT SUPPORT MATERIAL
7: ADMINISTRATION AND TERMS OF PAYMENT
8: TRAINING
9: THE MANAGEMENT
10: MANUFACTURER – DEALER RELATIONS
11: PROFITABILITY CONTRIBUTION
12: IMPROVEMENTS
13: FINANCING
14: ANTI-THEFT
BRAND AVERAGE – ALL COUNTRIES 2016



Evolution Average:

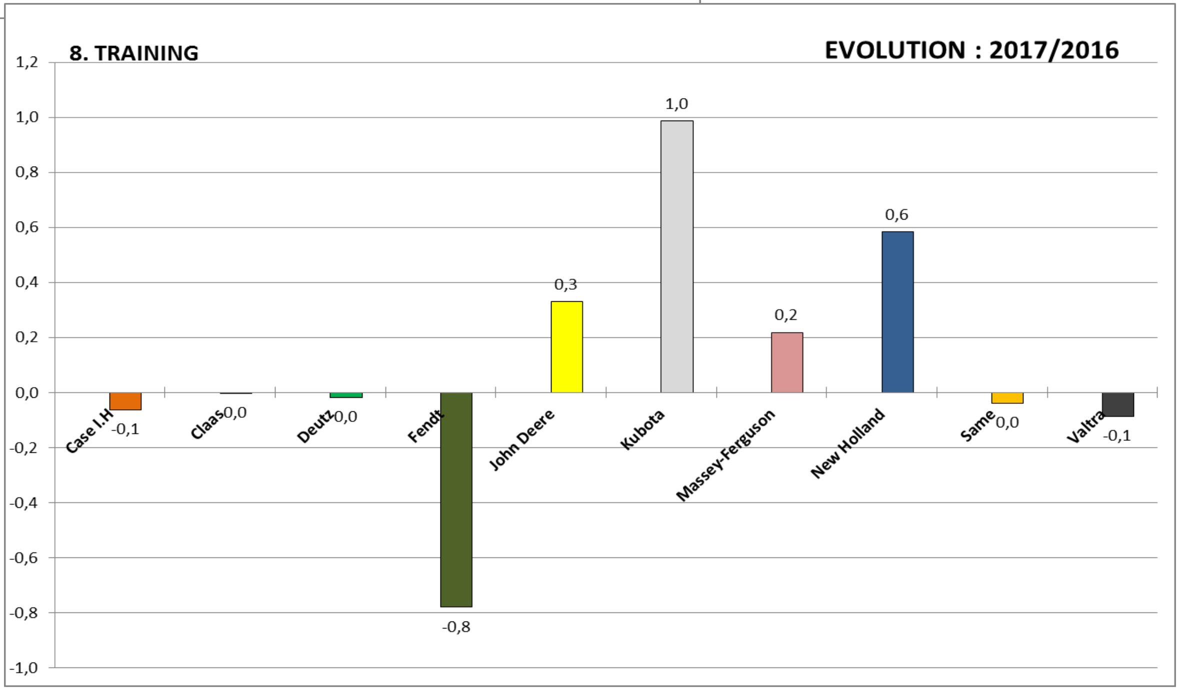
2017/2016: 14,8
2016/2015: 14,9
Result: - 0,1

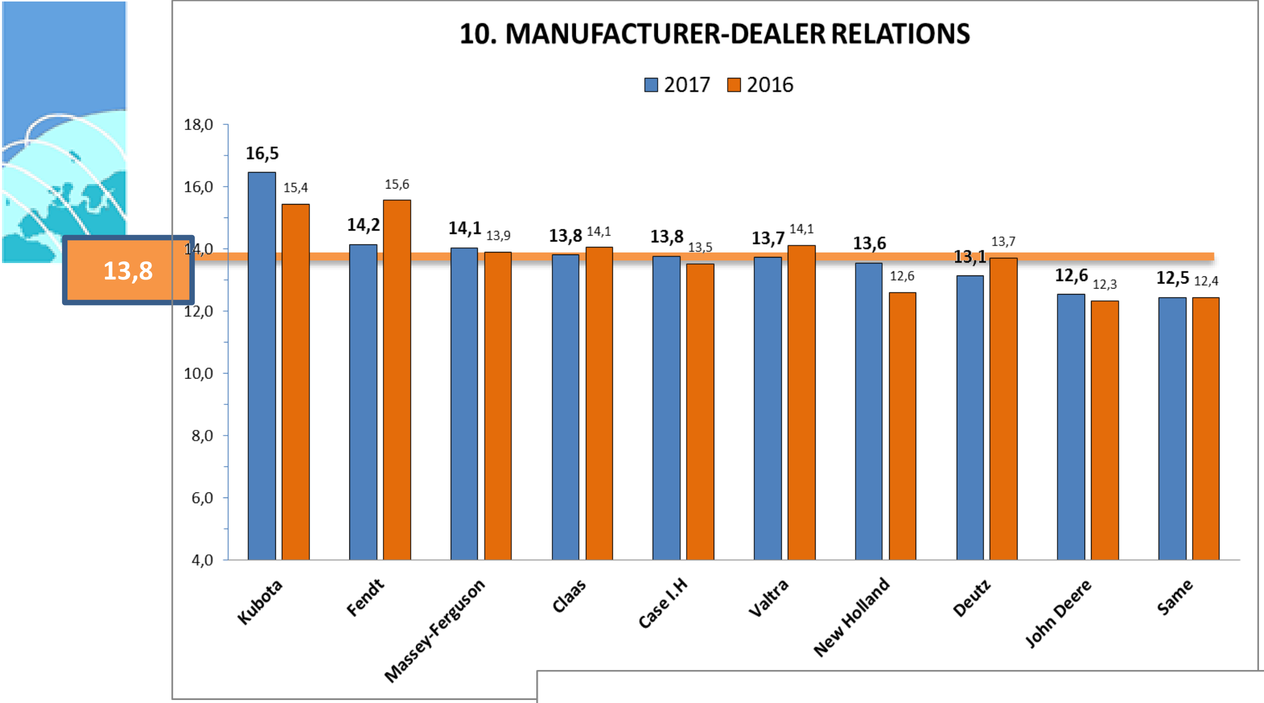




Evolution Average:

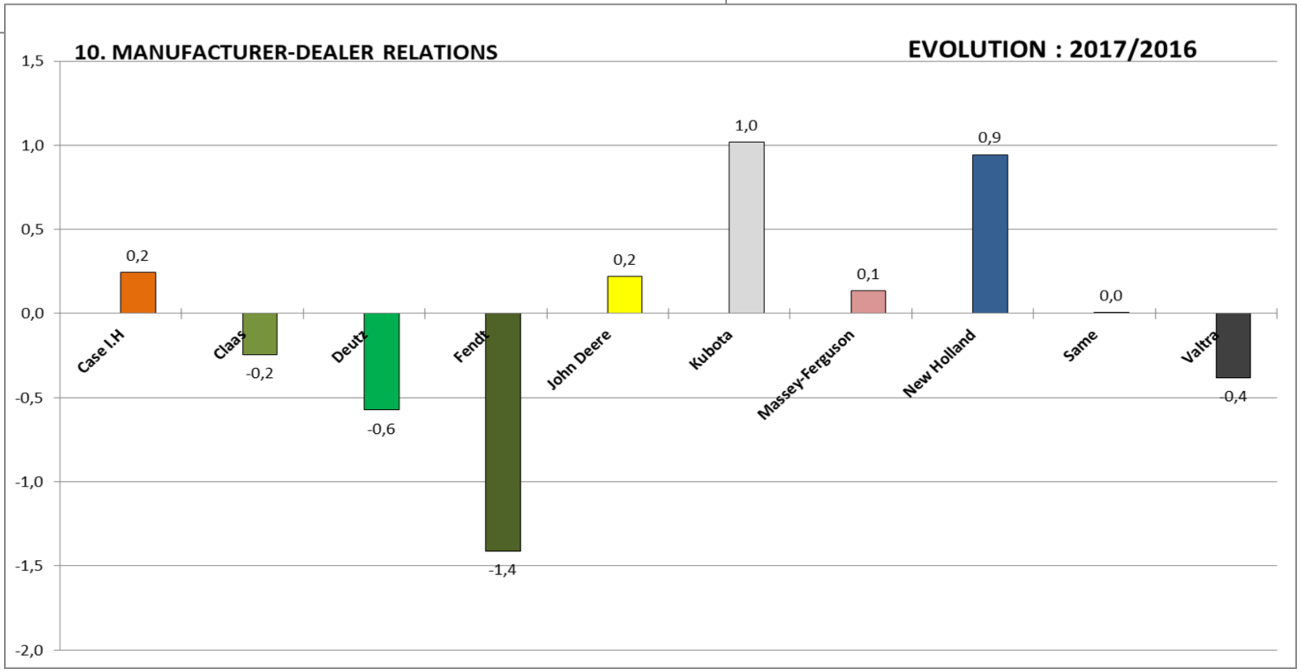
2017/2016:	13,1
2016/2015:	12,9
Result:	+0,2

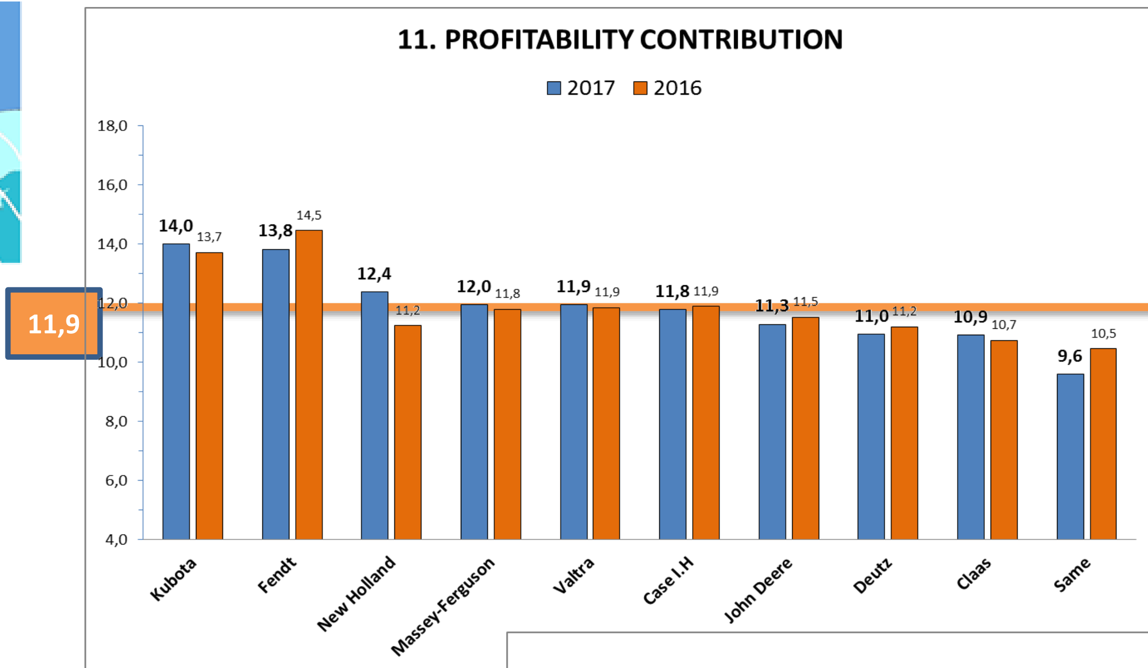




Evolution Average:

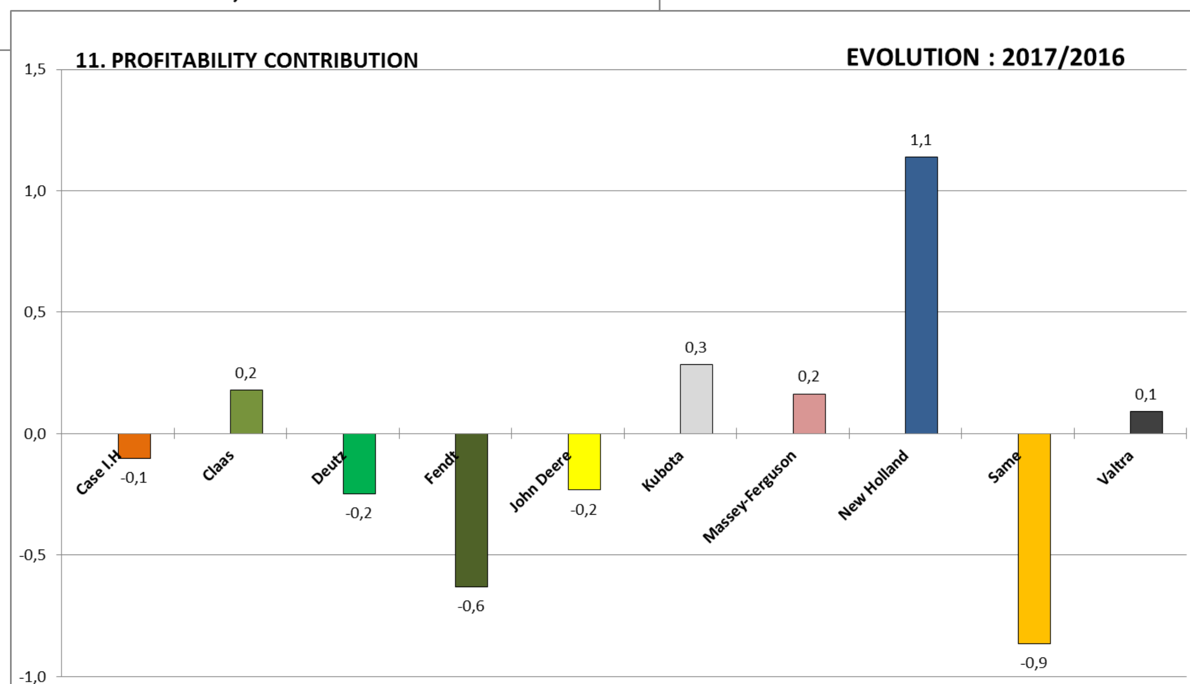
2017/2016:	13,8
2016/2015:	13,8
Result:	0,0



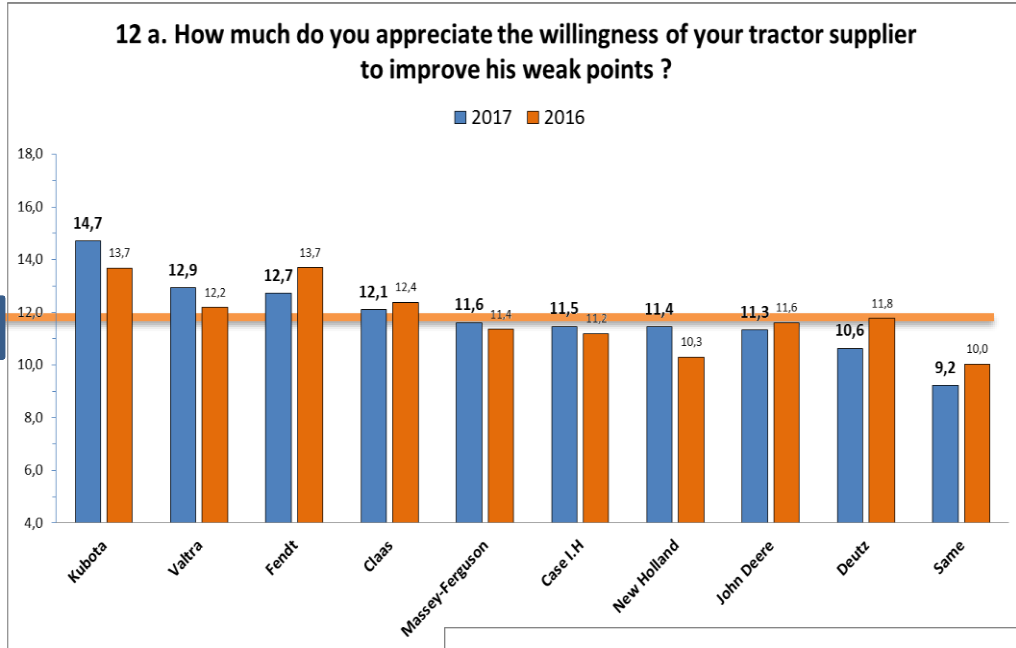


Evolution Average:

2017/2016:	11,9
2016/2015:	11,7
Result:	+ 0,2

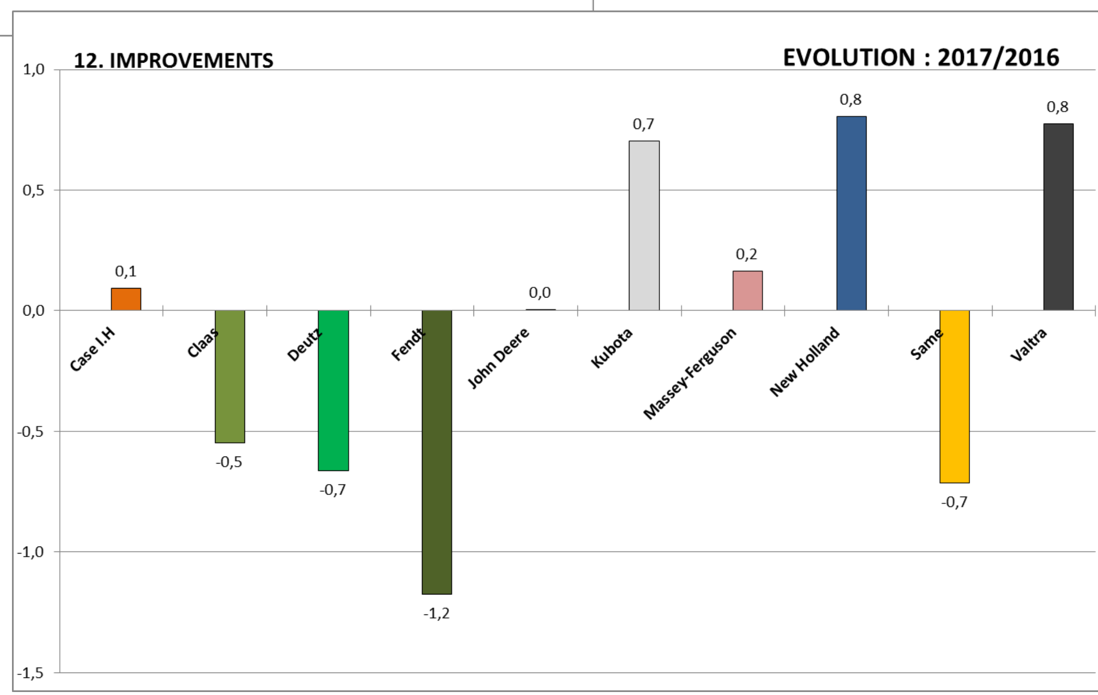


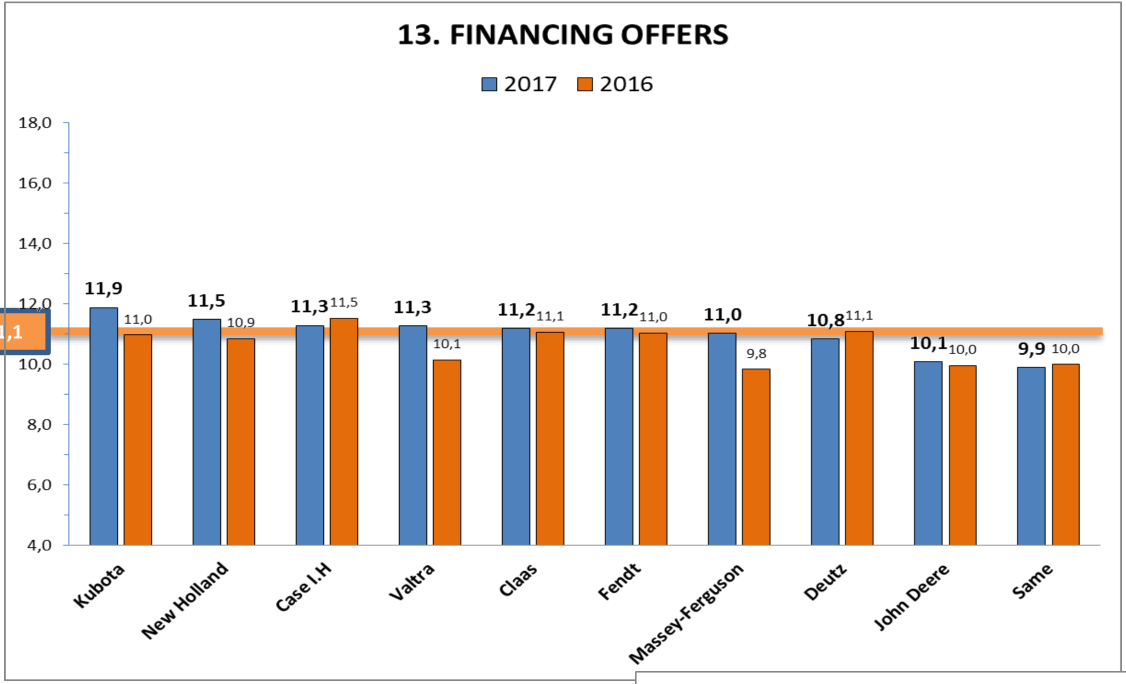
11,8



Evolution Average:

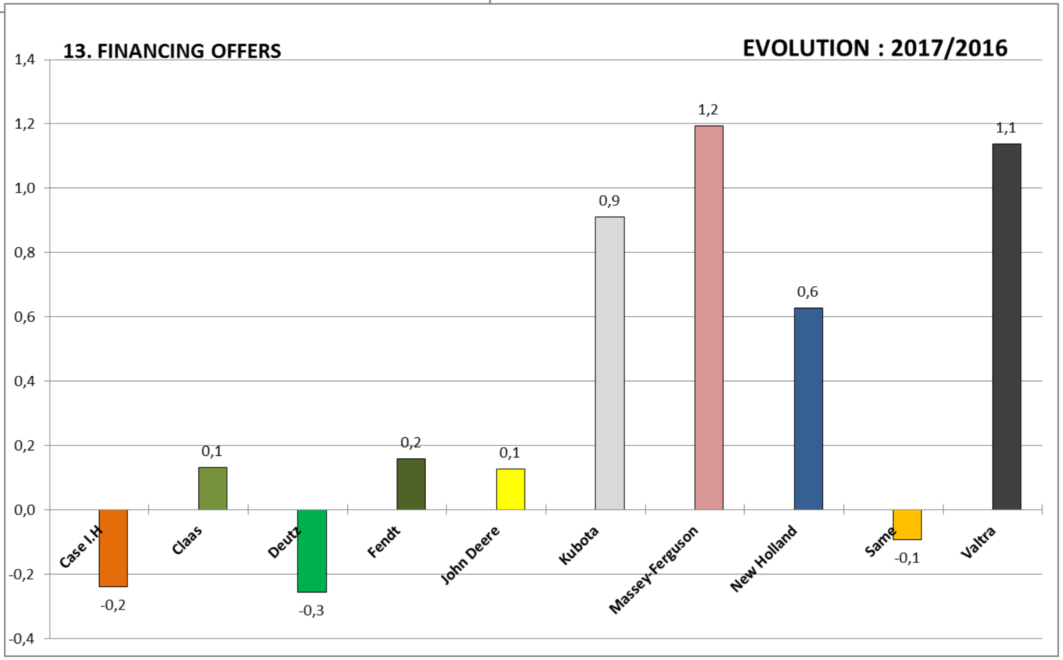
2017/2016:	11,8
2016/2015:	11,8
Result:	0,0

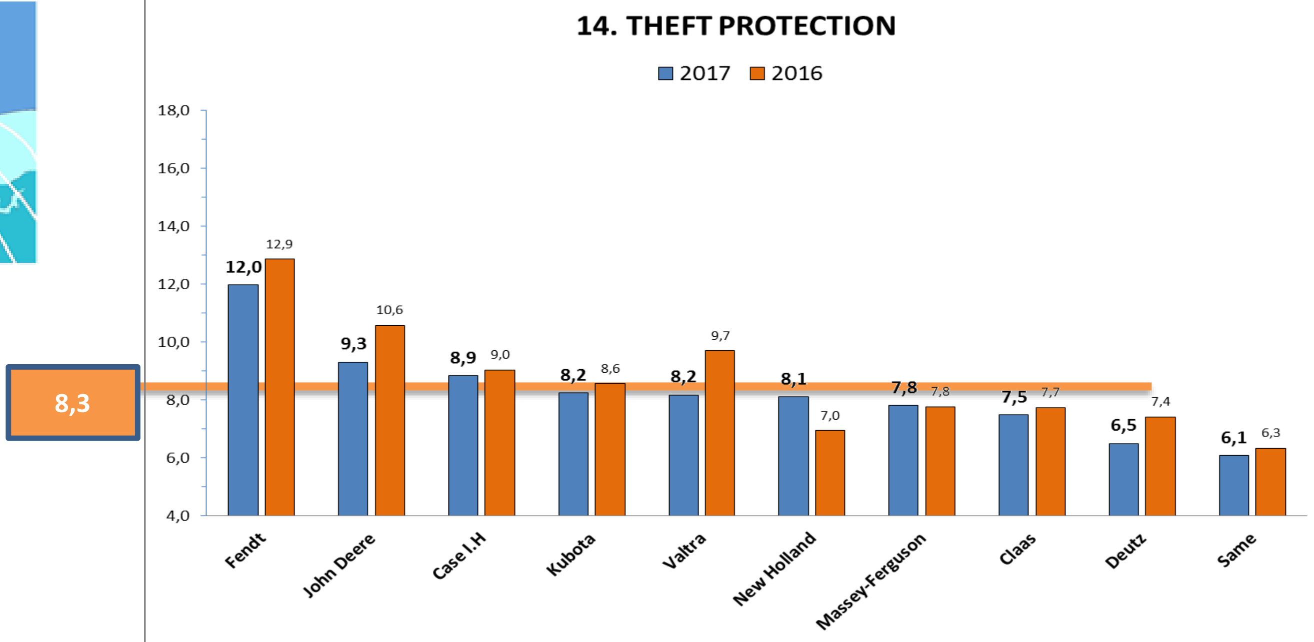




Evolution Average:

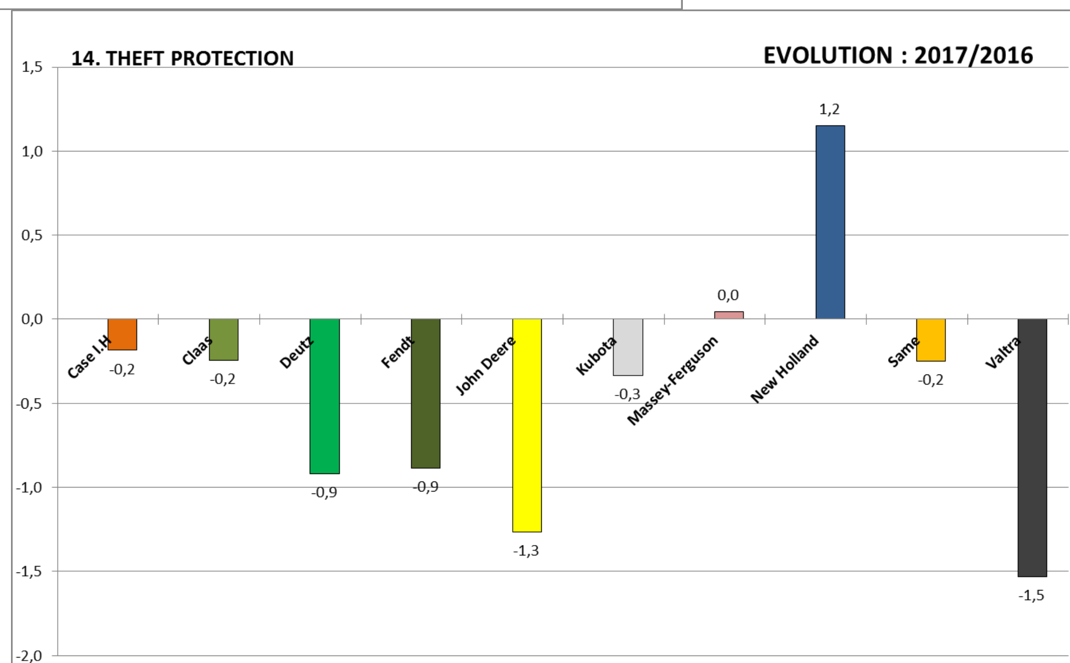
2017/2016:	11,1
2016/2015:	10,6
Result:	+ 0,5

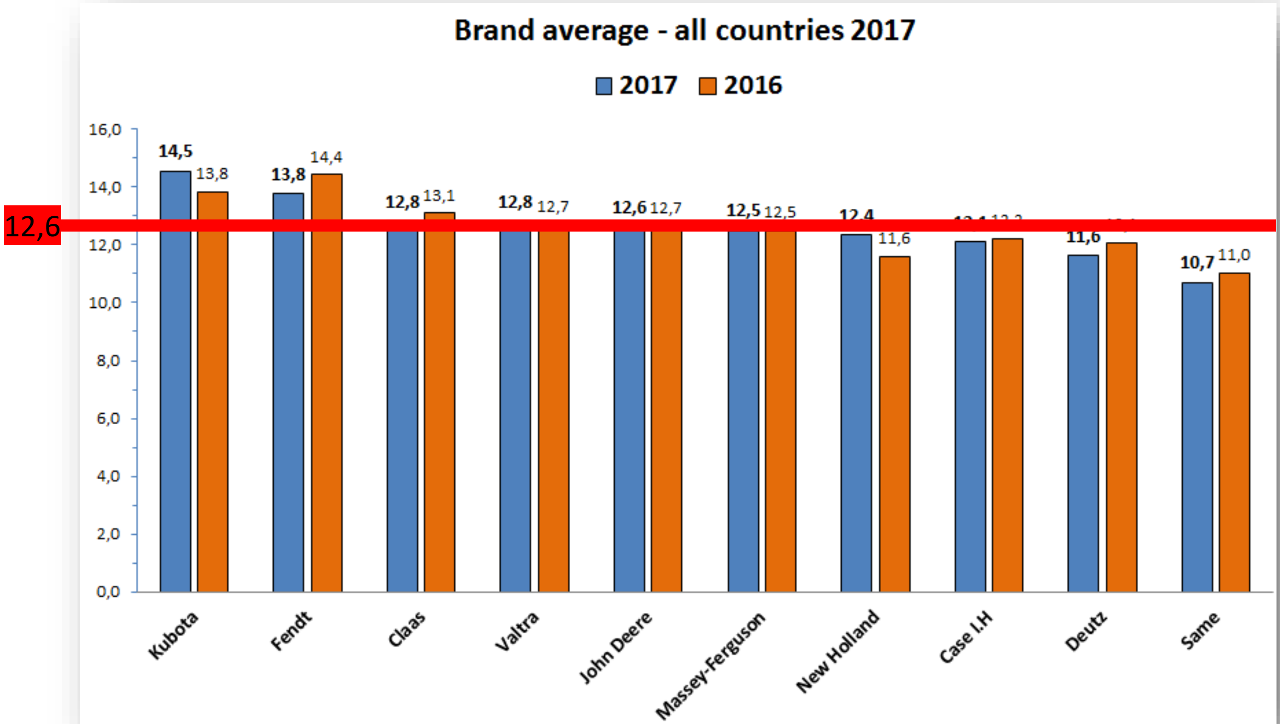




Evolution Average:

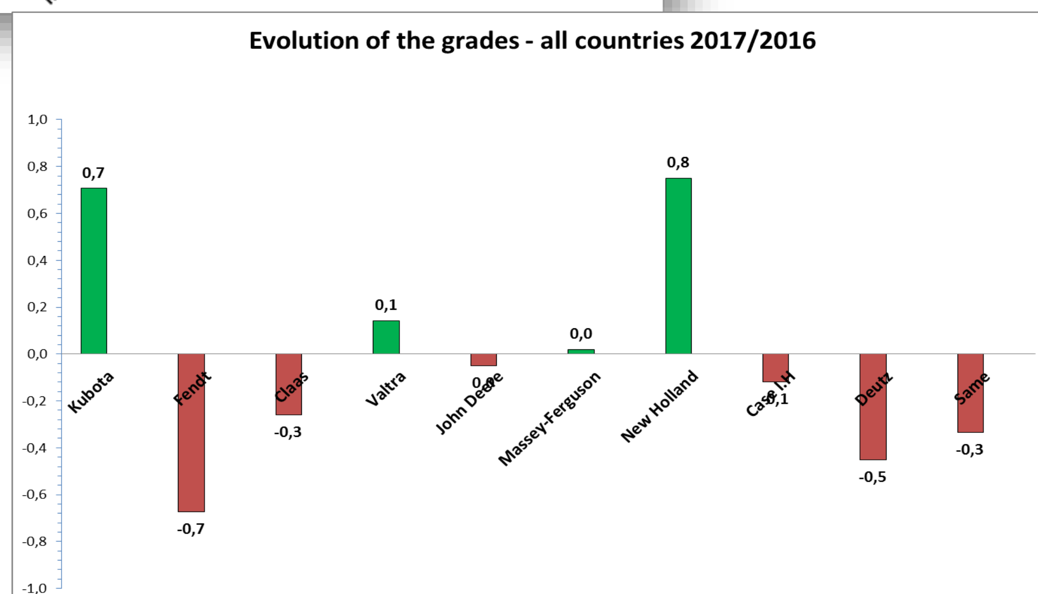
2017/2016:	8,3
2016/2015:	8,7
Result:	-0,4





Evolution Average:

2017/2016: 12,6
<u>2016/2015: 12,6</u>
Result: 0,0



Succesfull 64th CLIMMAR Congres in Luxembourg: *"Dealership 2030"*

“Dealer 2030”

Report and Summary of the Climmar Congress 2017

A preparation for future agenda and position paper(s) of Climmar

Step 1:
Awareness, information on trends and opinion forming

Summary of discussion at Climmar Congress 2017

Trends → **Impact** → **Lobby-themes**

Technological revolution
Global economy

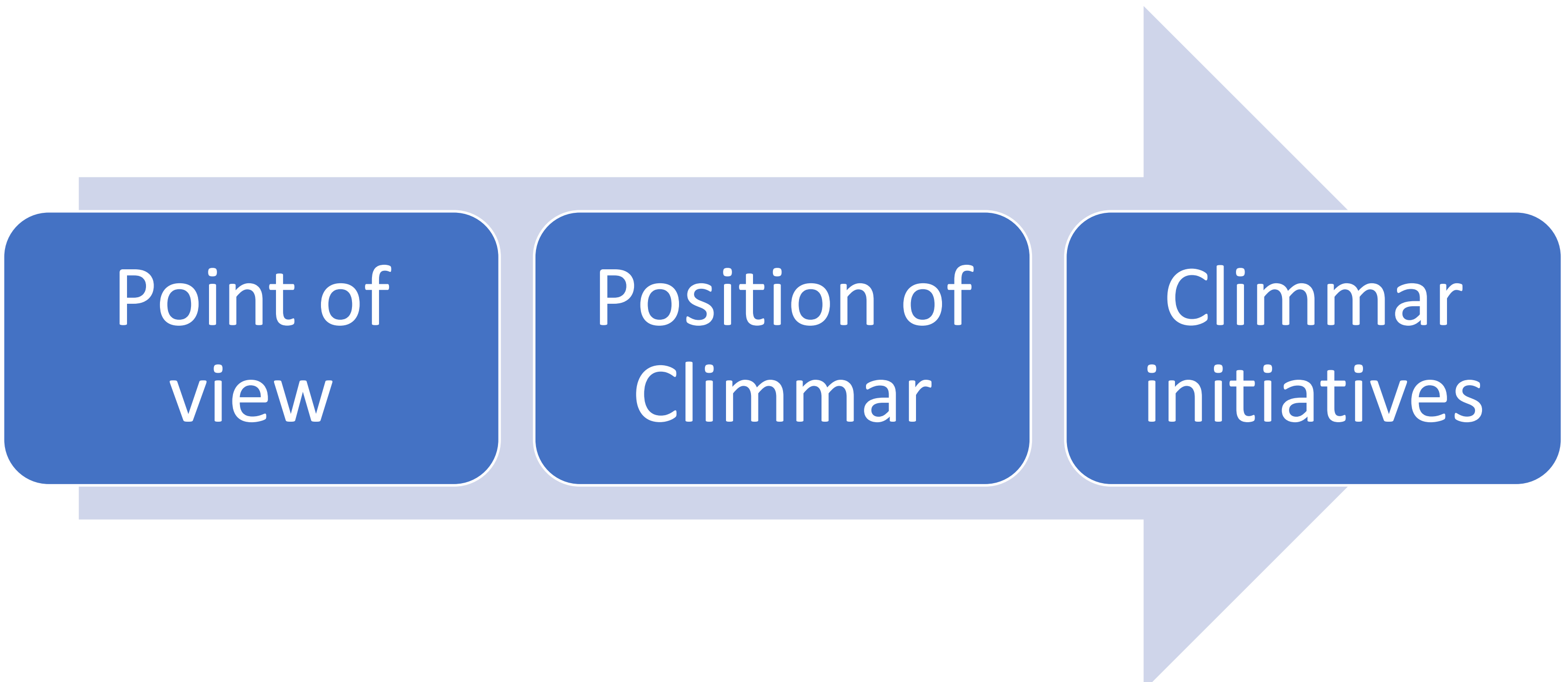
Opportunities
Threaths
for dealerbusiness

EU policy
Sector-regulation
Climmar-services

Step 2:
Opinions and views in ag-machinery chain

Summary of presentations and discussion at Climmar Congress 2017

Step 3:
Preliminary points of views, positions and initiatives
First proposal based on the achievements of the Climmar Congress 2017



Draft views and themes for Climmar Position Papers

	Point of view	Position Climmar	Initiatives
1.	Collaboration between manufacturers and delaers needs urgently be improved	• The dealer contracts need adjustments concerning framework of termination, exclusivity and compensations in order to have a better balance of rights and duties • To start common projects on improving service concepts	• Evaluate former collected information on different national surveys • Evaluate the exlusivity chapter • Analysis of period of termination and impact on organization and finance • Develop Climmar contract checklist
2.	Smart Farming is a big opportunity also for dealers and needs strongly facilitated	• Ag-Machinery should be (highly) compatable especially concerning IT-linking • Elaborate new service concept for advicing on analysis and information from data	• Start round table (and or poject) with CEETTAR, COPA and CEMA on conditions to realize compatible machinery • Start working group on new service concept on smart farming
3.	Big Data should bring agricultural processes to better yield, higher efficiency when all the suppliers exchange openly data for RMI and Telematics (open data sourcing and exchanging)	• There should be a independent business role for the dealer to exchange data (RMI, Telematics) with and give advice to customers and manufacturers	• Speed up the RMI process and realize an independent diagnostic digital tool • Start study on the future of telematics in ag-machinery and use in service concepts • Study code of conduct COPA • Advocating for 100% connectivity in rural areas

Draft views and themes for Climmar Position Papers

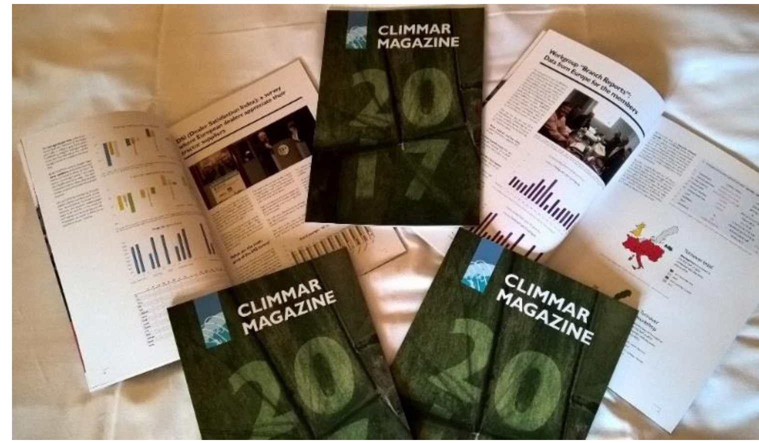
	Point of view	Position Climmar	Initiatives
4.	Upgrading the dealer services level	• Climmar introduces a Climmar Quality Service Standard for all dealers	• Start a working group to prepare a common future oriented service level framework that can be used in all member countries • Study on a Climmar Trade Service Standard
5.	Dealers need to make more money out of used machinery (value setting, financing, distribution, international sales, etc.)	• Climmar develops and initiates new business models to increase the value of used machinery	• Start a working group to prepare several different business models in generating value out of used machinery, for example in: international cooperation in purchase and selling, models to refurbish with parts of new techniques, etc.
6.	Machinery and service on demand (24/7, direct service at distance and nearby, agronomic advice, etc.) will grow	• Climmar develops and initiates new business models on machinery and services on demand • The member-organisations of Climmar create awareness on fast changing demand on service of dealers	• Start a working group to prepare new business models on machinery and services on demand • Organise in member-organisations information on changing service demands

Draft views and themes for Climmar Position Papers

	Point of view	Position Climmar	Initiatives
7.	Skilled and competent organization and employees are the base for continuity of dealers	• The sector needs to attract young talents and retain qualified and competent employees	• A common image and marketing campaign to make the sector attractive for young people, with CEETTAR, CEMA and Climmar • A working group that collects, compares and prepares a working program to better make use of best practices on education • Go on with the existing educational programs • Study on transfer fee to prevent exit mecanics from sector
8.	Collaboration with organizations in EU to realize common interests and goals;	• Climmar actively searches for collaboration with organizations that help the agricultural sector forwards and strenghten the position of the dealers	• Regularly deliberating with CEETTAR, COPA, CEMA, etc. on relevant trends and on lobby issues • Issue position papers and exchange mutual interesting statements and documents • Introduce Climmar at European Committee and Parliament

CLIMMAR Magazine

- In 2017, the first ‘new style’ CLIMMAR Magazine was published. **<u>the result is one to be proud of</u>**.
- The 2018 edition version is planned to be available in March 2018.



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LECTURA
it's good to know

Download the magazine at:
www.climmar.com

CLIMMAR Meetings 2018

Spring meeting:

7-8 of March 2018 > Innsbruck, Austria

Congress:

5-7 of October 2018 > Prague, Czech Republic

Thank you for your attention!
For more information and this presentation:

WWW.CLIMMAR.COM