

# 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!  
16.898 Dealers and counting!  
139.894 Dealers employees  
3.487.911 Farmers  
1.942.149.220,5 ha. in total

# CLIMMAR Press Conference 2016

**Introduction to the highlights of  
CLIMMAR-activities in 2016 by the  
four strategic goals**

# Four Strategic Goals of CLIMMAR

## (2015-2018)

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

## **Strategic goal 1: Respected lobby organization > take action on the impact and image of CLIMMAR**

### **CLIMMAR' lobby involvement in EU Directive on Repair and Maintenance Information:**

- The EU wants to “open up” the market of repair and maintenance information by the EU regulation 167/13. One main issue in this regulation is to define the details of the access to any repair and maintenance information through a CEN-standard.
- The manufacturers are absolutely not happy with this regulation, but they are not able to stop it.
- The representative technical body in CEN for this file is the TC 144 Working Group 2 consisting mainly of manufacturers .
- The Working Group has made a draft standard for this EU regulation without any involvement or consultation of other parties, such as the independent services and repairers companies.
- This draft standard was not accepted in the CEN vote meeting in February this year

## **CLIMMAR' lobby involvement in EU Directive on Repair and Maintenance Information:**

- There will be an official CEN meeting in December of this year where the status of the draft standard again is measured. If there is no solution and acceptance on the new route to draft a new standard with the involvement of other parties, the CEN does not have any more options than to give the assignment back to the European Commission saying that they were not able to come to a mutual decision on a draft standard.
- The coming weeks will be crucial for the continuation of the process:
  - Scenario 1: there will be acceptance to work together with the manufacturers on a new draft standard, or:
  - Scenario 2: the EU will take over the process and we have to see and wait what the next steps will be.

## **CLIMMAR' lobby involvement in EU Directive on Repair and Maintenance Information:**

### Conclusion:

- The work done so far seems little in result / effect, but has been necessary for getting involved into the process and to become a recognized party in writing the new draft standard.
- **From CLIMMAR we call on the CEMA / manufacturers to work together with us on this important file for our sector!**
- CLIMMAR will organize a special RMI membersmeeting in January 2017 to participate on the outcome of the scenario's

## Ongoing lobby contacts



### With the CEMA:

- Contact on a regular base
- Looking for mutual interest and cooperation on topical items like education and training, the uptake of smartfarming and Agricultural Precision Technologies



### With the CEETTAR:

(European organisation for agricultural, rural and forestry contractors)

- Recently contact is established.
- Meeting is planned for the end of this year with the director and members of the board. To learn each others organisations and exchange views on topical items of interest for both organisations

## Going on contacts

With the World Bank Group:



### **World Bank 'Enabling the Business in Agriculture' 2016 report**

This report was published in January 2016: [eba.worldbank.org](http://eba.worldbank.org)

The report provides a tool for policymakers to identify and analyze legal barriers for the business of agriculture. Chapter 4 looks particularly into the machinery-related aspects. In particular, it looks also into good practices for tractor dealer requirements.

Contact with the WorldBank Officials responsible for this report is established. They are very much interested in looking for cooperation with CLIMMAR and willing to come to an exchange of views on how to achieve sustainable agricultural mechanization into development regions / countries. In February 2017 the new report will be published.



## Strategic goal 2: Improve the image and awareness of mechanics in the European Branch

### Goal of the CLIMMAR Working group on Education and Training:

- To increase quantity & quality of inflow of young people and develop staff to the required qualification levels
- Euroskills competitions achieve this purpose, as a continuous process in the different participating countries.
- The next event will be held in Gothenburg, Sweden from 30 November to 4 December 2016, including our skill: the Agricultural Mechanic
- Increase of the participation for our skill : 8 countries instead of 7, with the arrival of Russia. All the countries present in 2014 will be there in 2016: Austria, Denmark, France, Germany, Latvia, Russia, Switzerland, The Netherlands
- Same expert and chief expert : Paul Dijkstra (NL), Paul Sidler (CH) named by Climmar



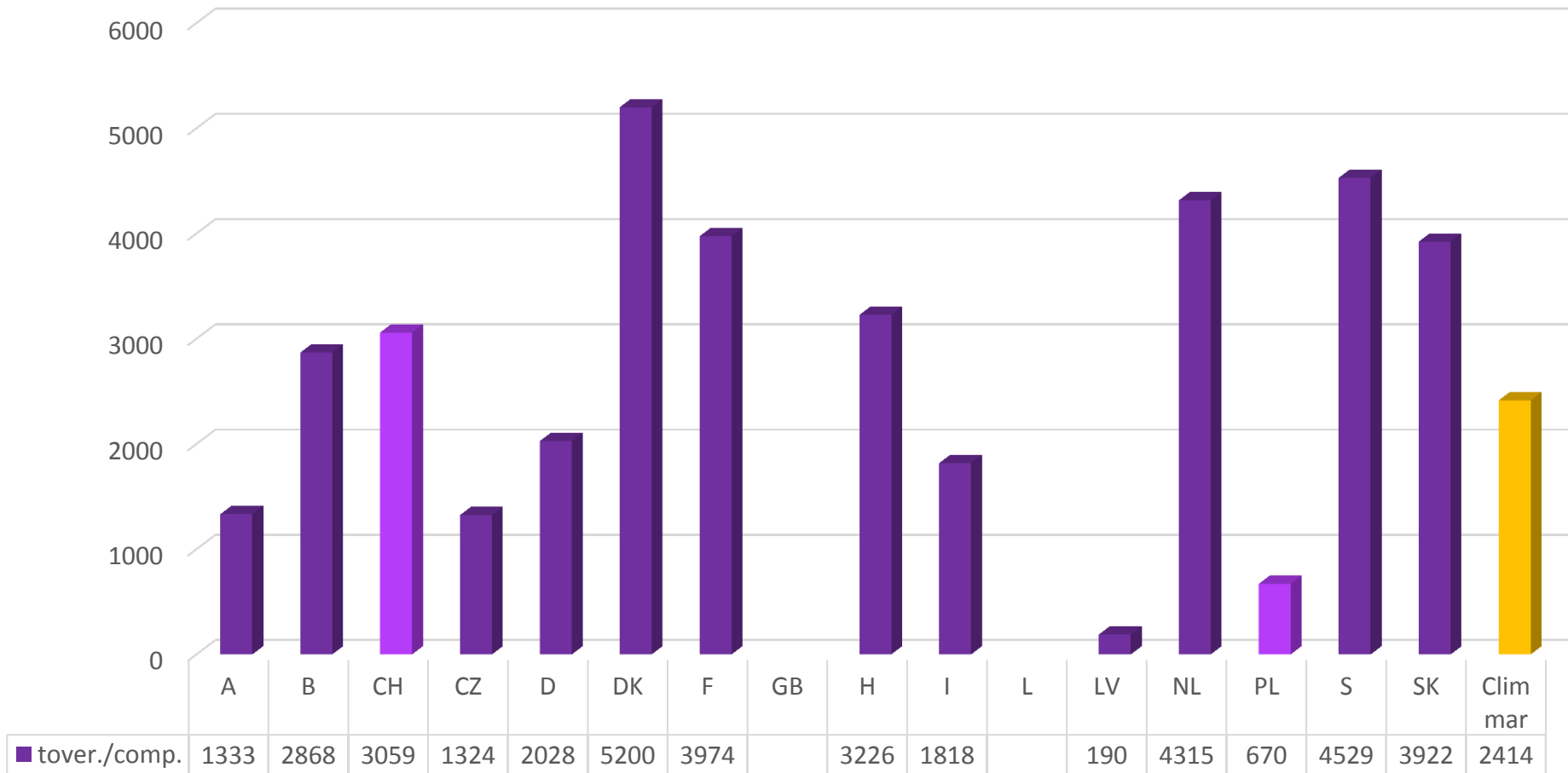
## **Strategic goal 3: Strengthen the position and profitability of European agromachinery-dealers – Better tools to measure performance of dealers in member-countries**

Currently CLIMMAR has two tools to measure performance of dealers:

- The CLIMMAR Branch Reports
- The Annual Dealer Satisfaction Index Survey (DSI)

# Some Highlights of the Branch Report 2016

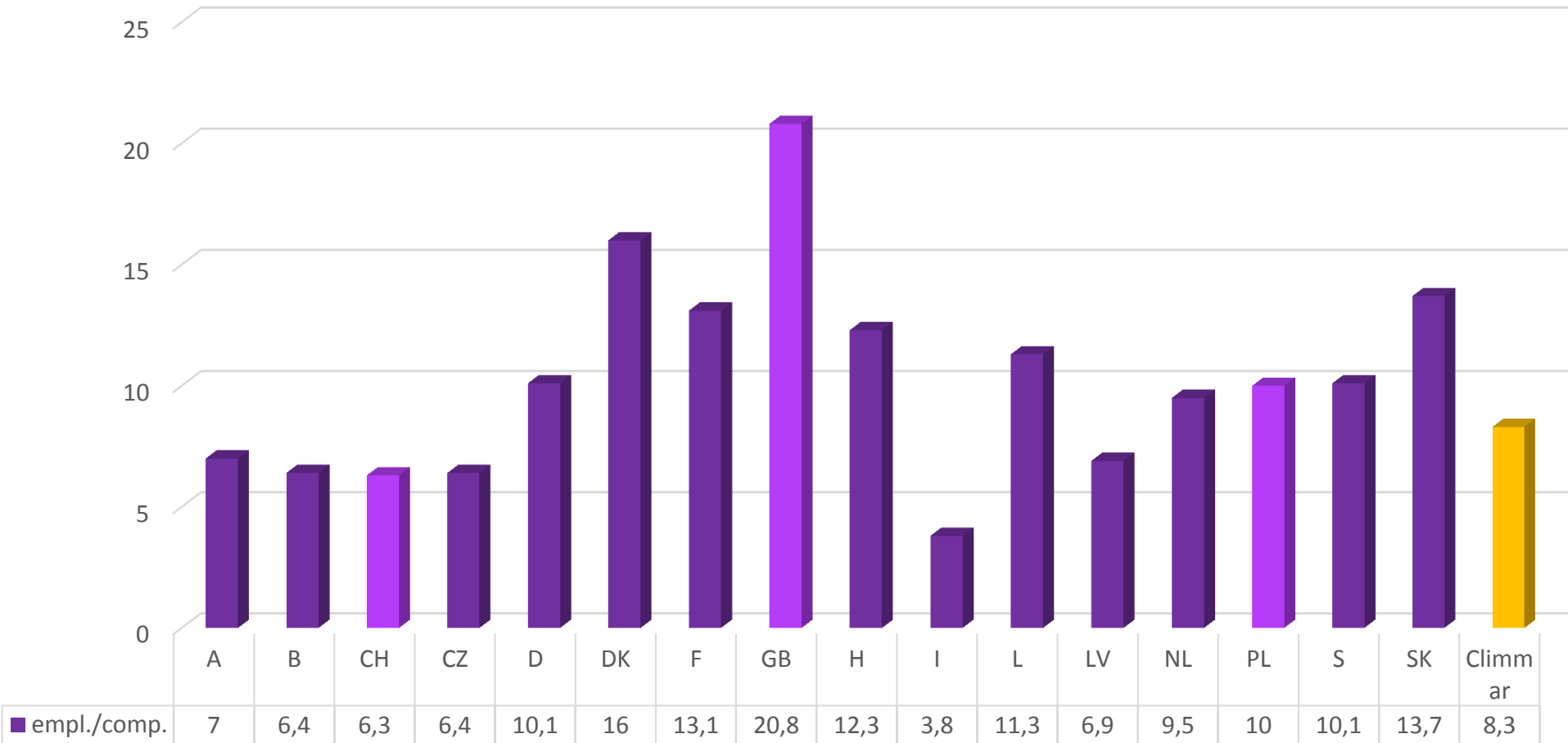
relations: Turnover per Company



CH from 2015  
 PL estimated

Source: CLIMMAR

## relations: Employees per Company

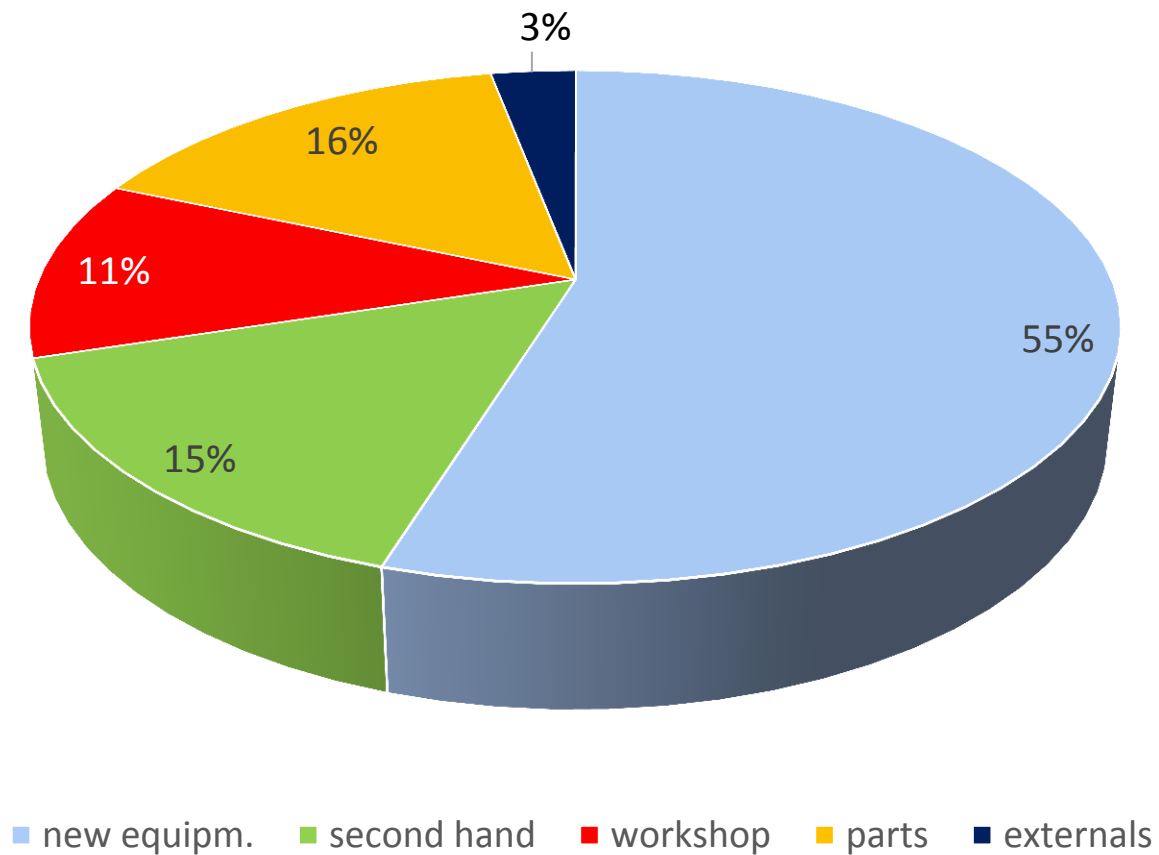


CH & GB from 2015  
 PL estimated

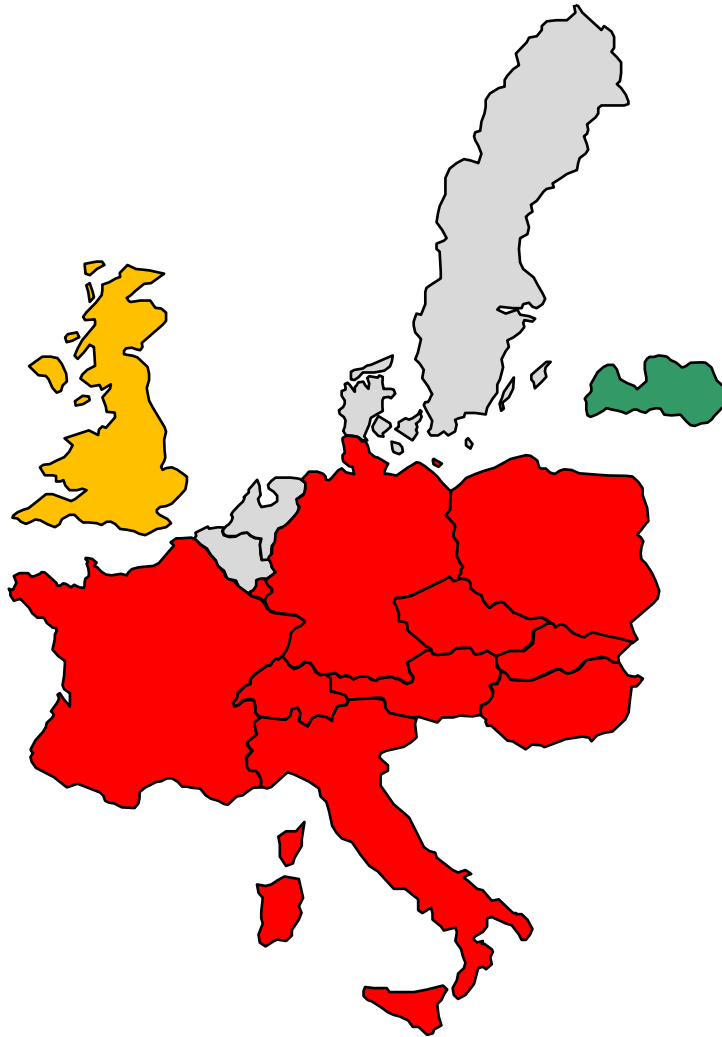
CLIMMAR pressconference 9th of  
 November 2016

Source: CLIMMAR

turnover-structure of the average CLIMMAR-dealer



## Part II - Trends:

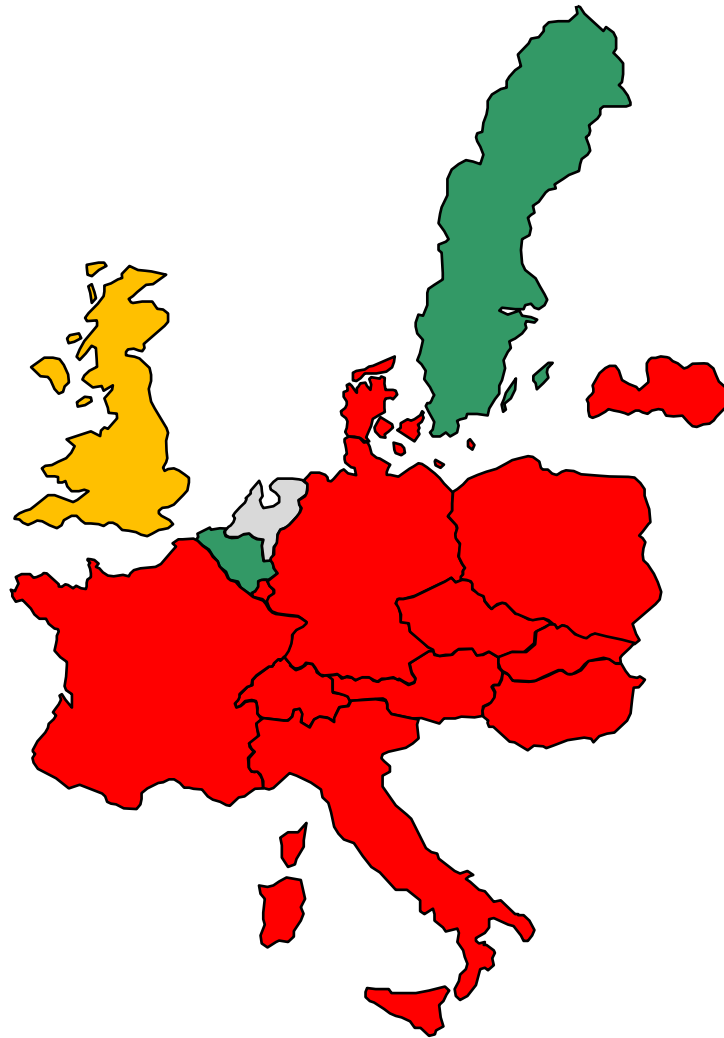


## Turnover total

**development** of turnover in  
the first half of 2016  
compared with the same  
period 2015:

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

## Part II - Trends:

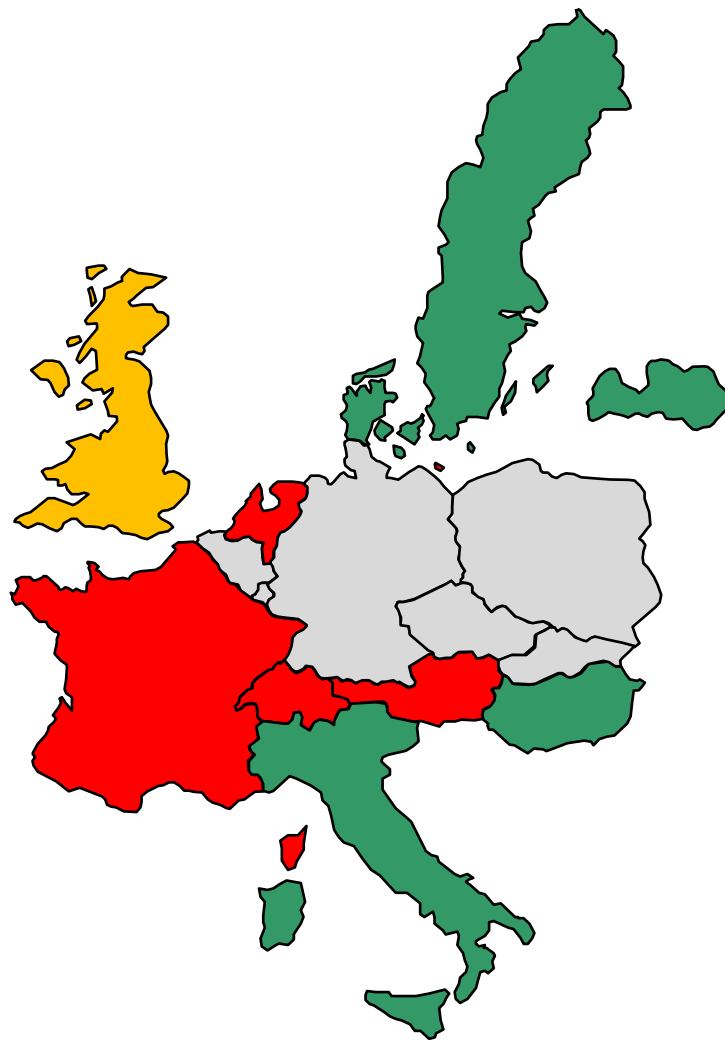


## Turnover new equipment

development of turnover in the first half of 2016 compared with the same period 2015:

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

## Part II - Trends:



## Turnover workshop

development of turnover in the first half of 2016 compared with the same period 2015:

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



## Part II - Trends:



## Turnover spareparts

development of turnover in  
the first half of 2016  
compared with the same  
period 2015:

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

# European Dealer Satisfaction Index 2016



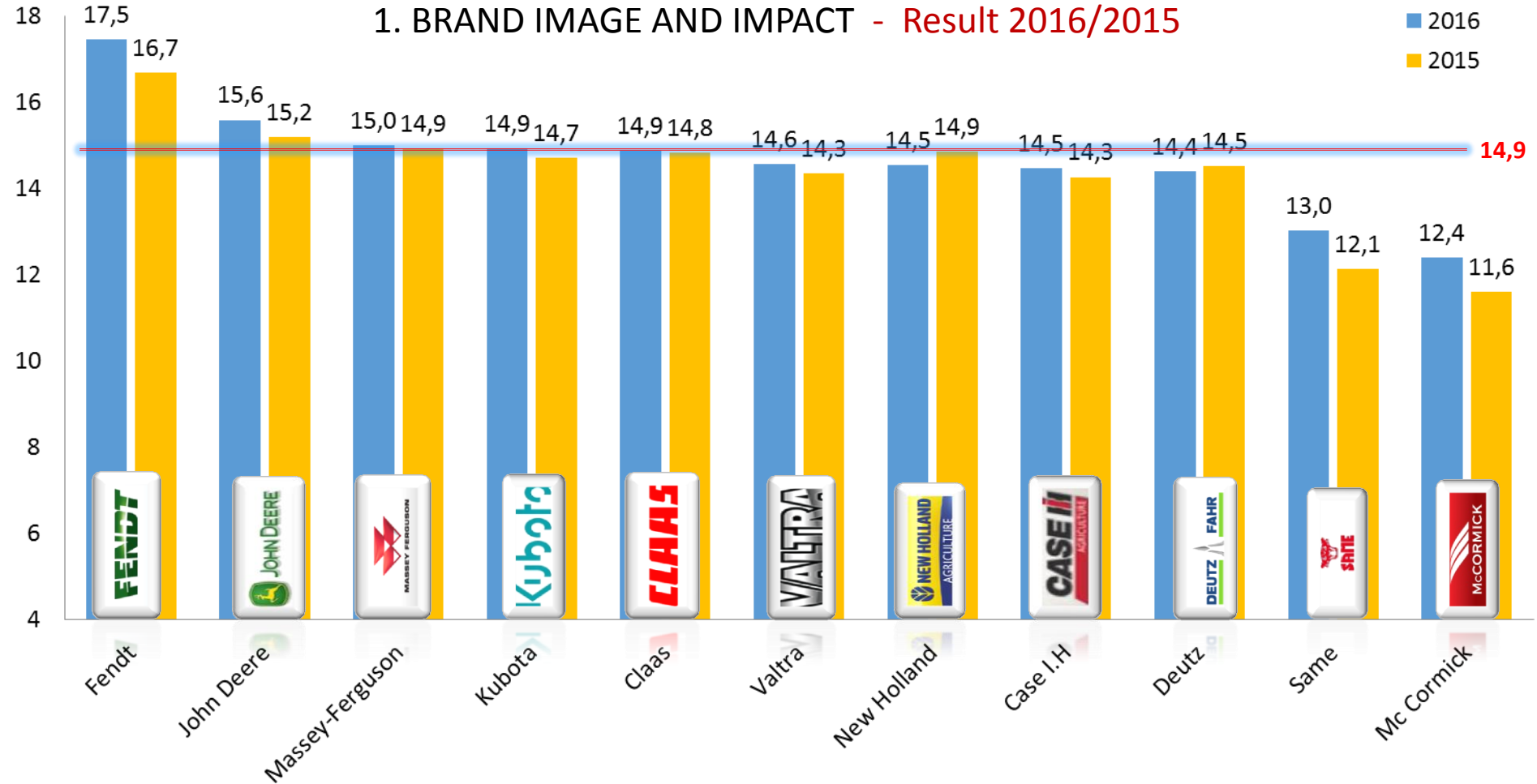


	2011	2012	2013	2014	2015	2016
<b>BELGIUM</b>	-	-	-	36	40	63
<b>DENMARK</b>	96	76	108	84	92	93
<b>FRANCE</b>	288	269	303	332	308	280
<b>GERMANY</b>	313	305	244	301	274	285
<b>ITALY</b>	58	-	-	-	168	143
<b>POLAND</b>	38	32	30	46	63	42
<b>THE NETHERLANDS</b>	163	168	174	199	176	149
<b>SWITZERLAND</b>	131	100	96	132	-	-
<b>UNITED KINGDOM</b>	-	145	180	122	133	150
	<b>1087</b>	<b>1095</b>	<b>1135</b>	<b>1252</b>	<b>1254</b>	<b>1205</b>

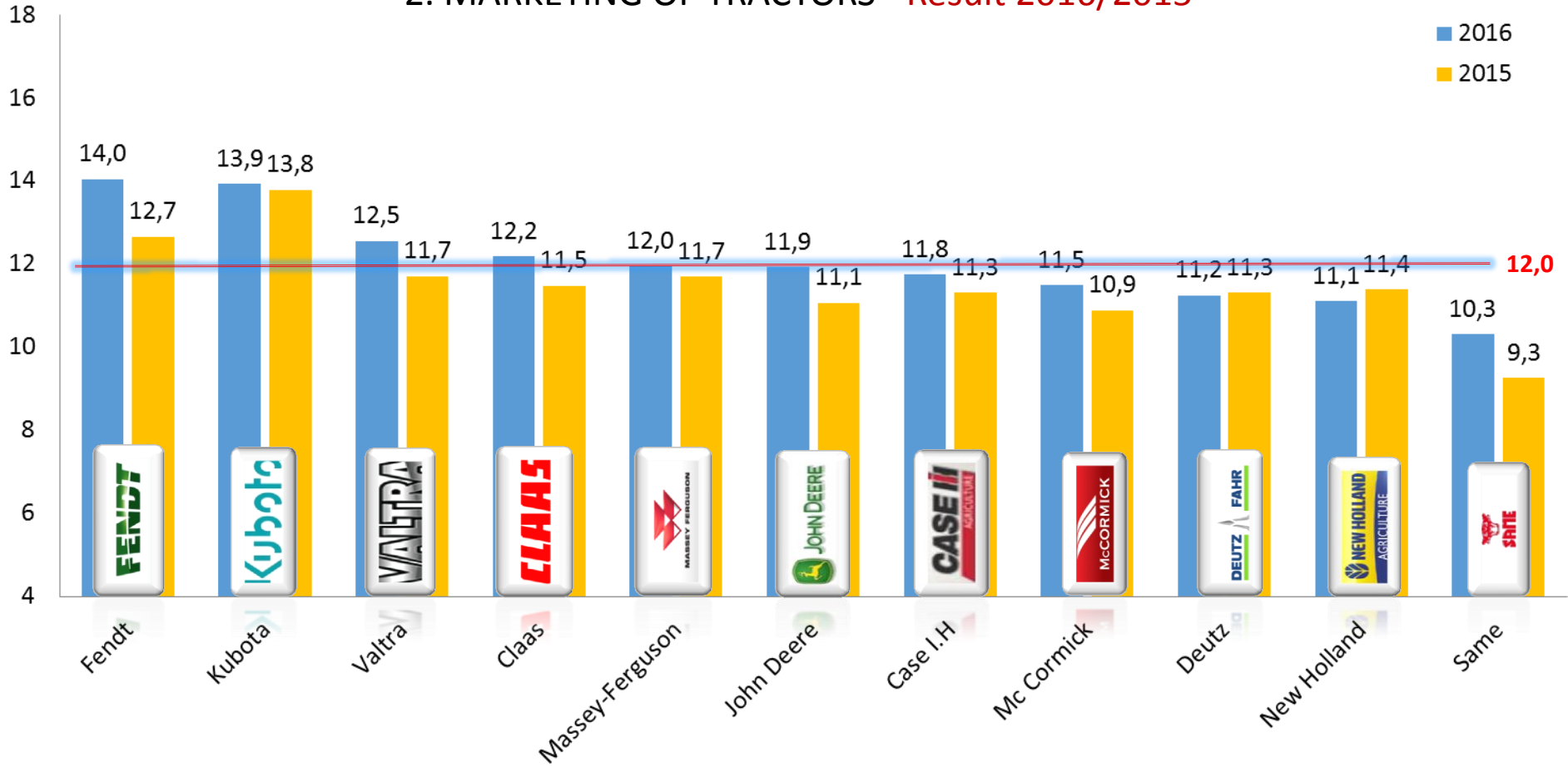
## **RESULTS BY MAIN CATEGORY AND WITH EVOLUTION 2015 / 2016:**

- 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

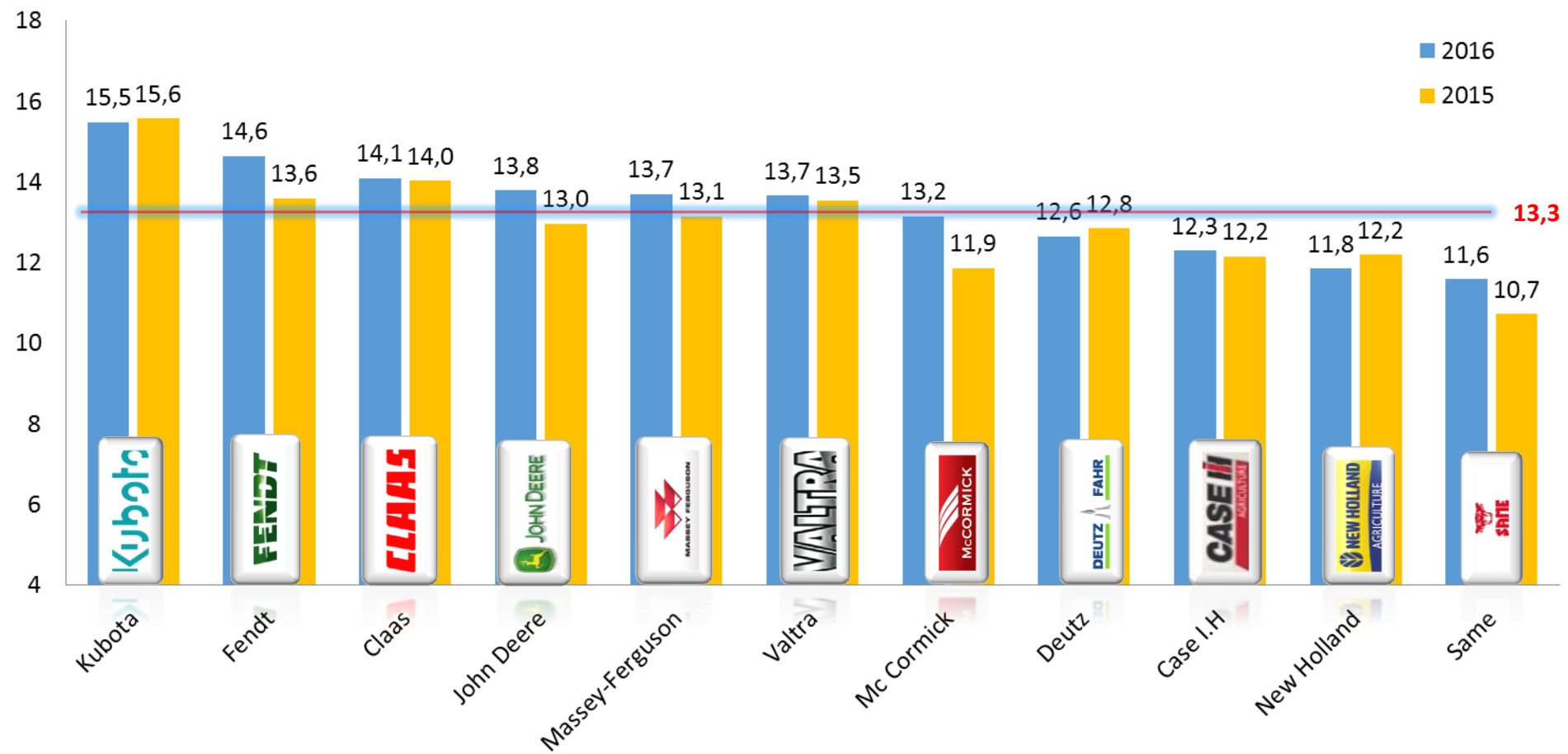
## 1. BRAND IMAGE AND IMPACT - Result 2016/2015



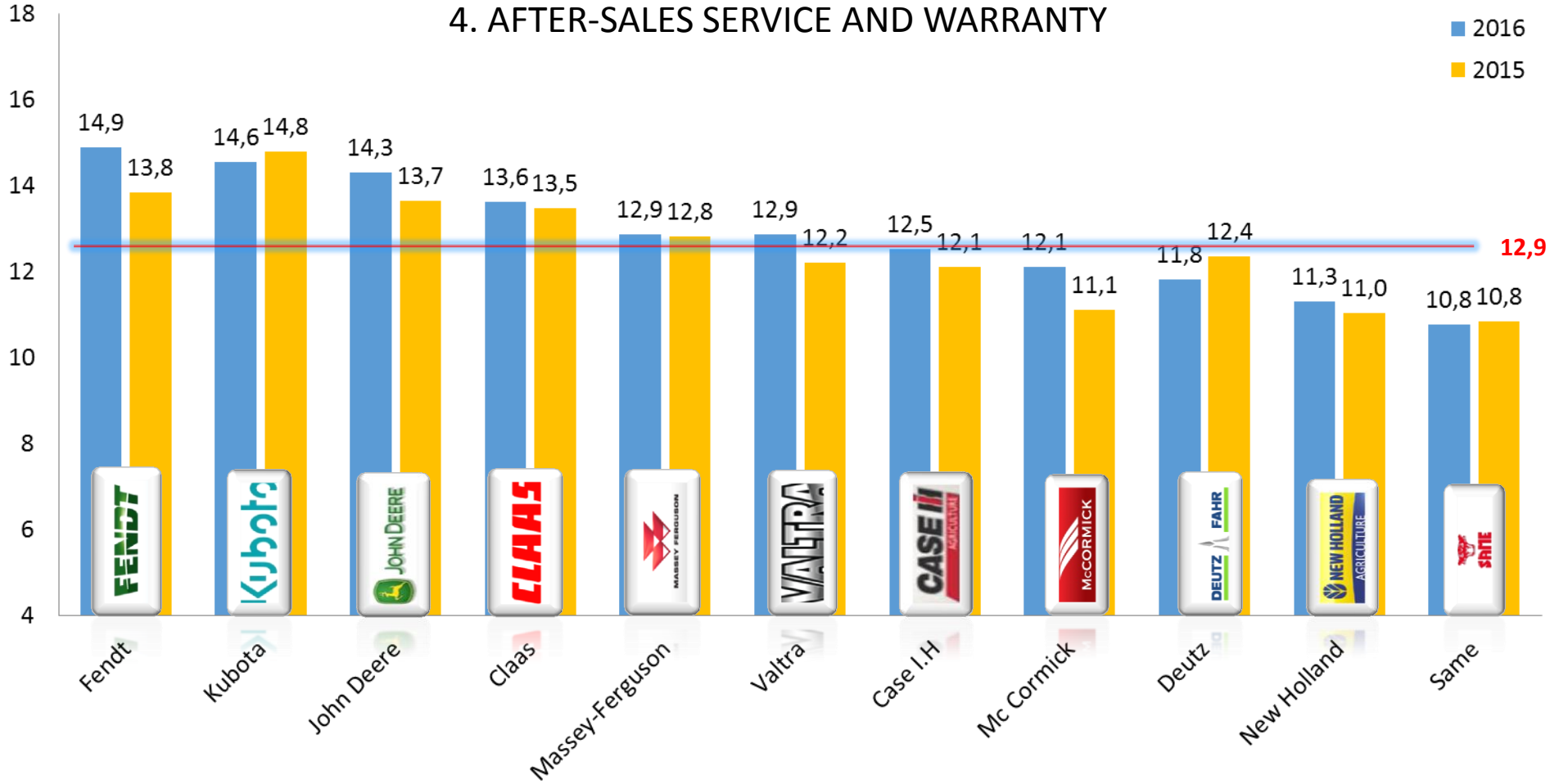
## 2. MARKETING OF TRACTORS - Result 2016/2015



### 3. MARKETING OF SPARE PARTS - Result 2016/2015

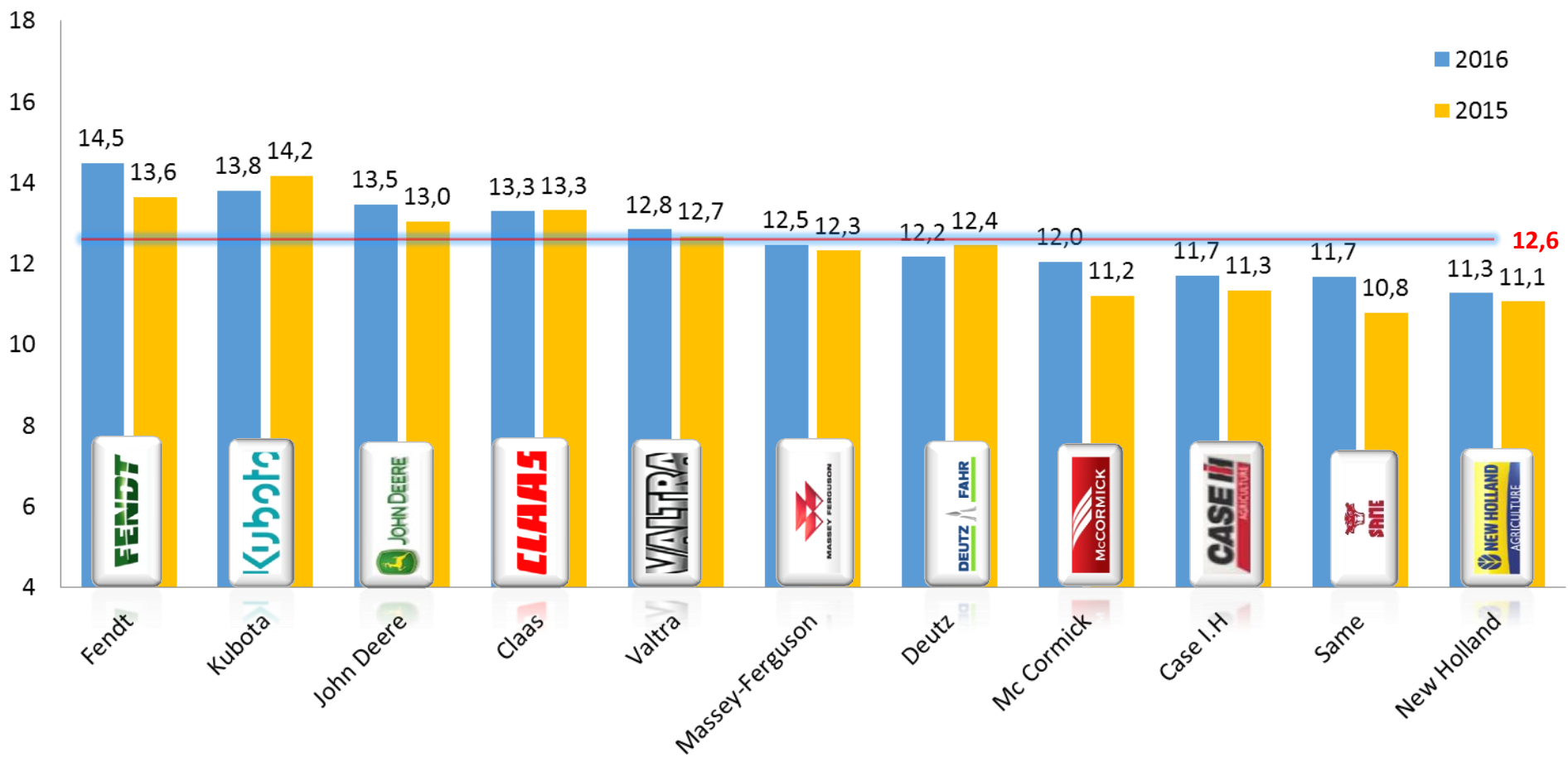


### 4. AFTER-SALES SERVICE AND WARRANTY



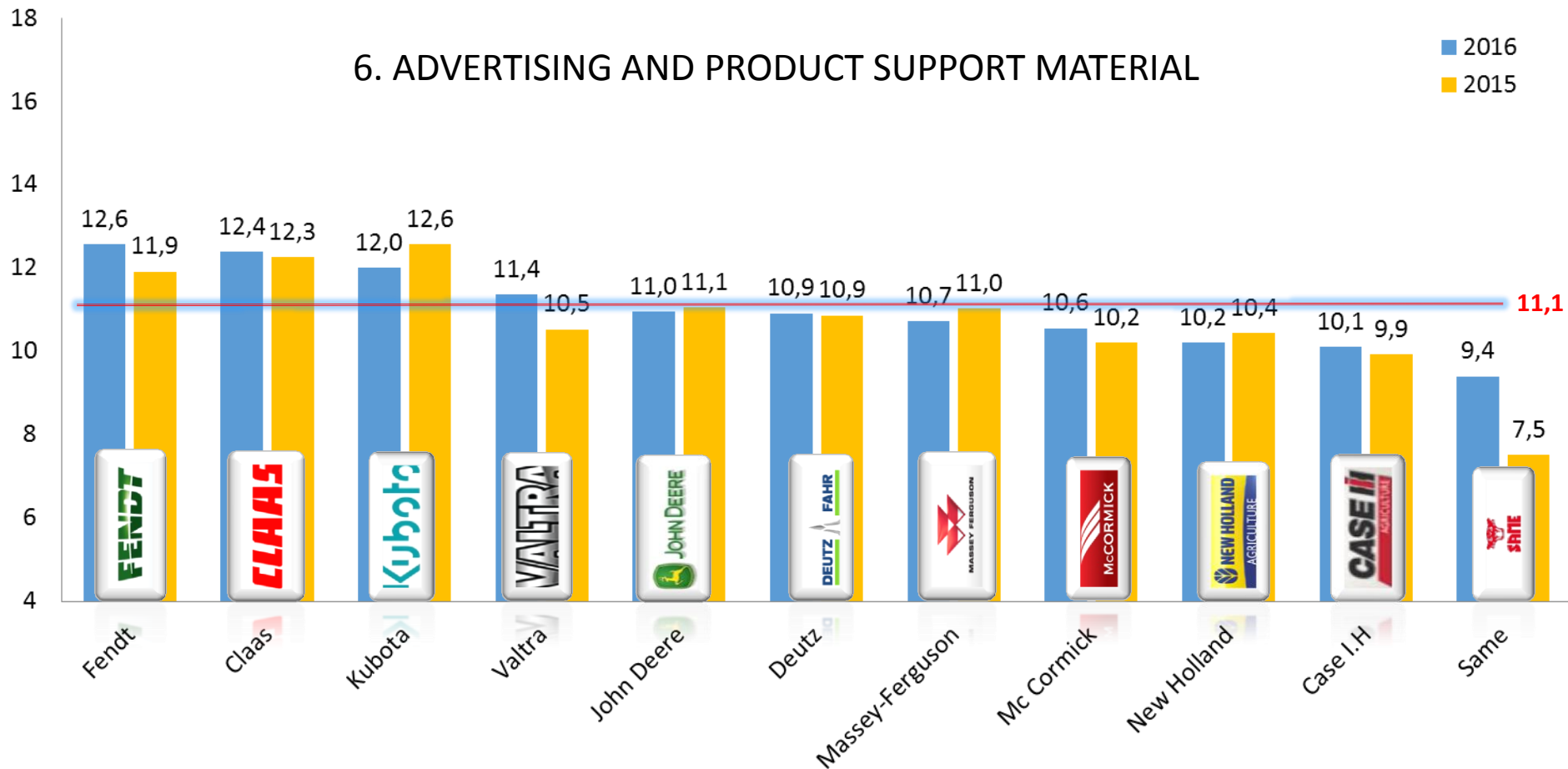


### 5. COMPUTER SERVICES

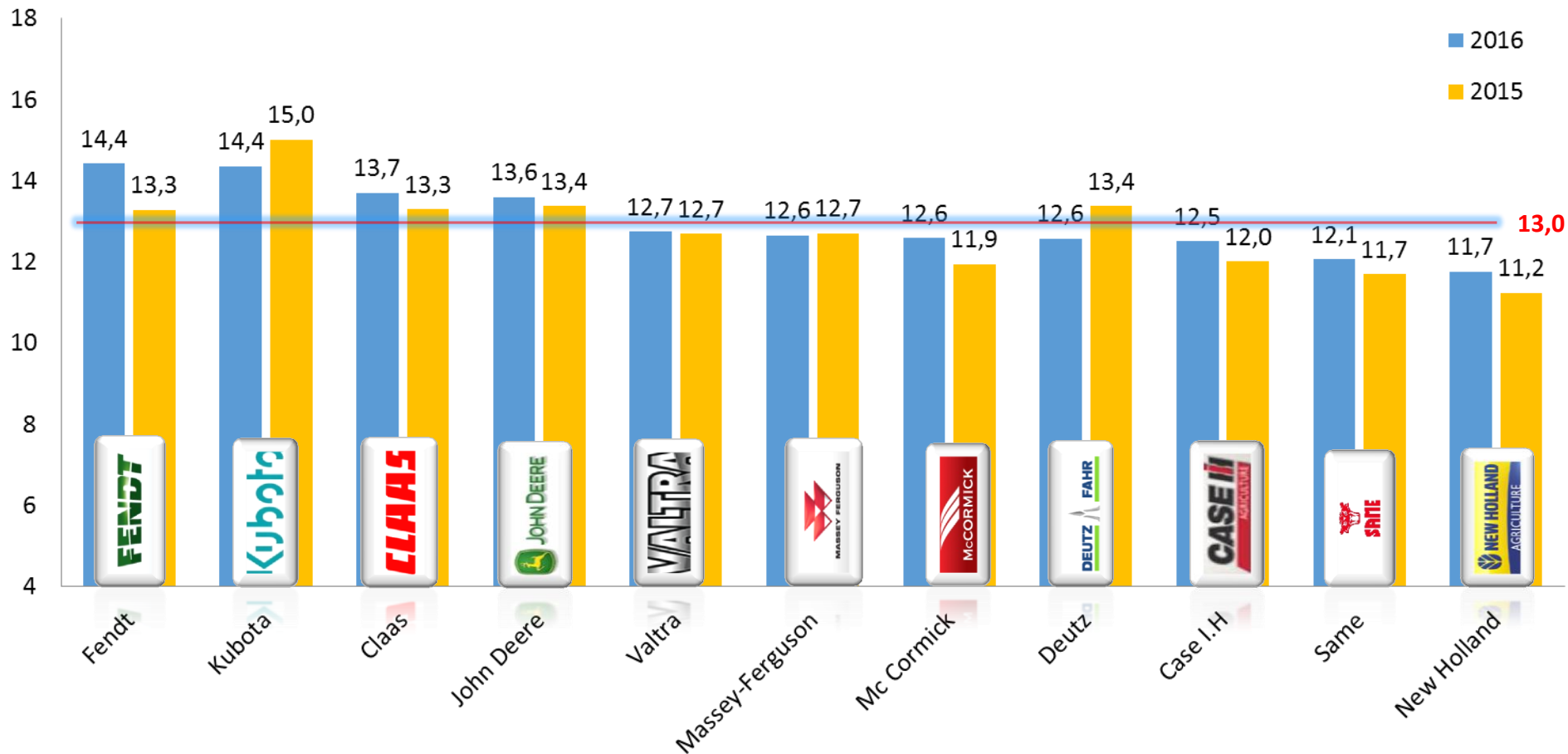


## 6. ADVERTISING AND PRODUCT SUPPORT MATERIAL

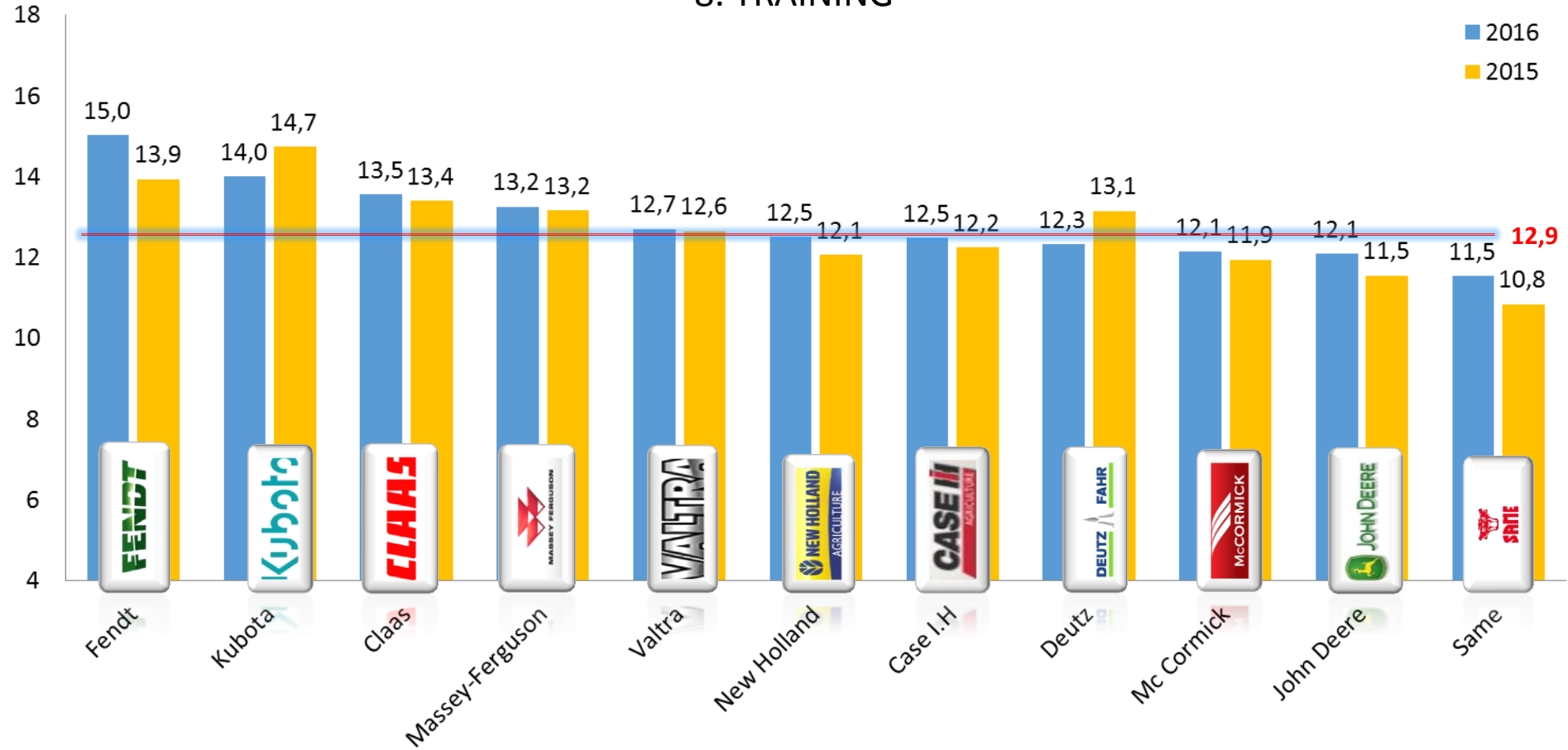
■ 2016  
 ■ 2015



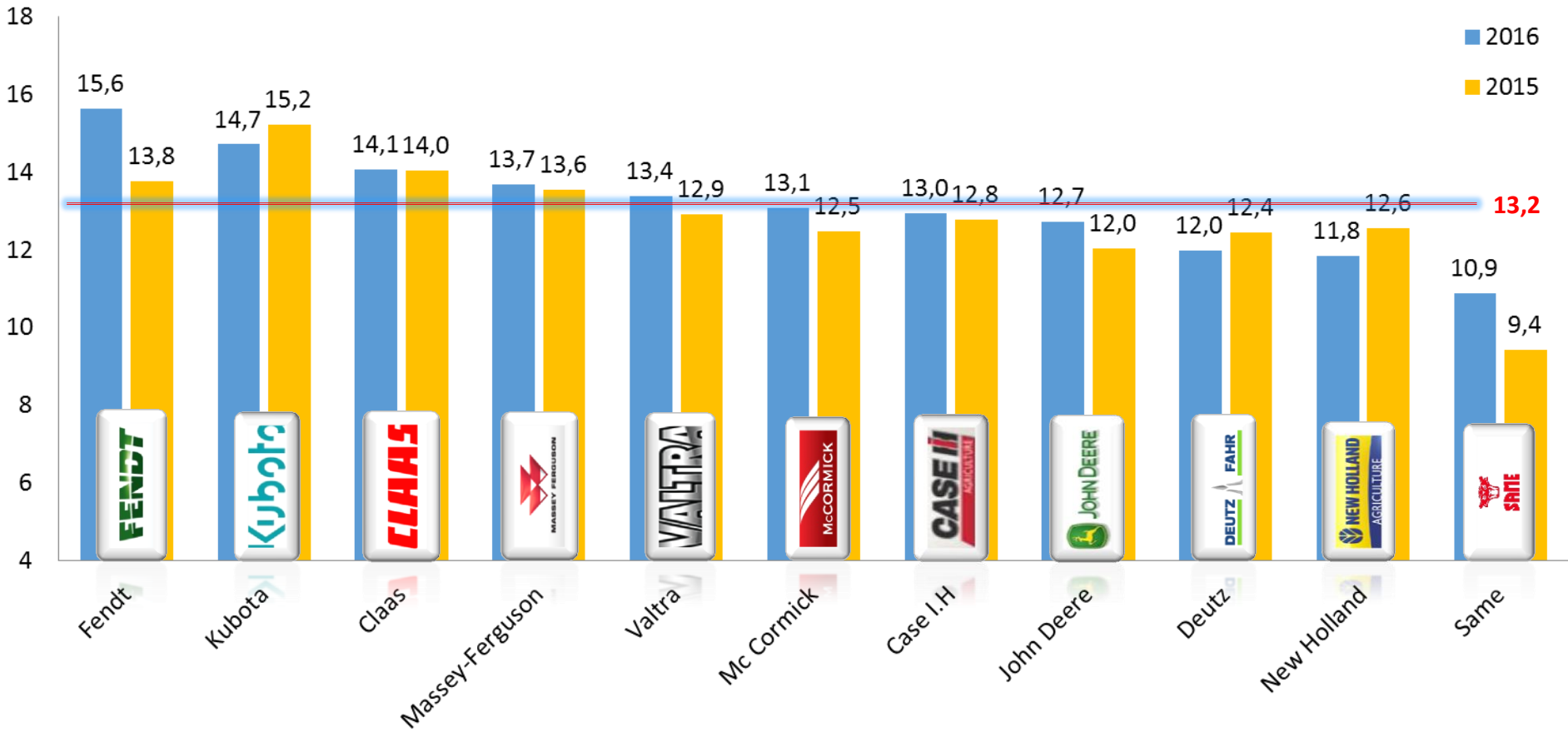
## 7. ADMINISTRATION AND TERMS OF PAYMENT



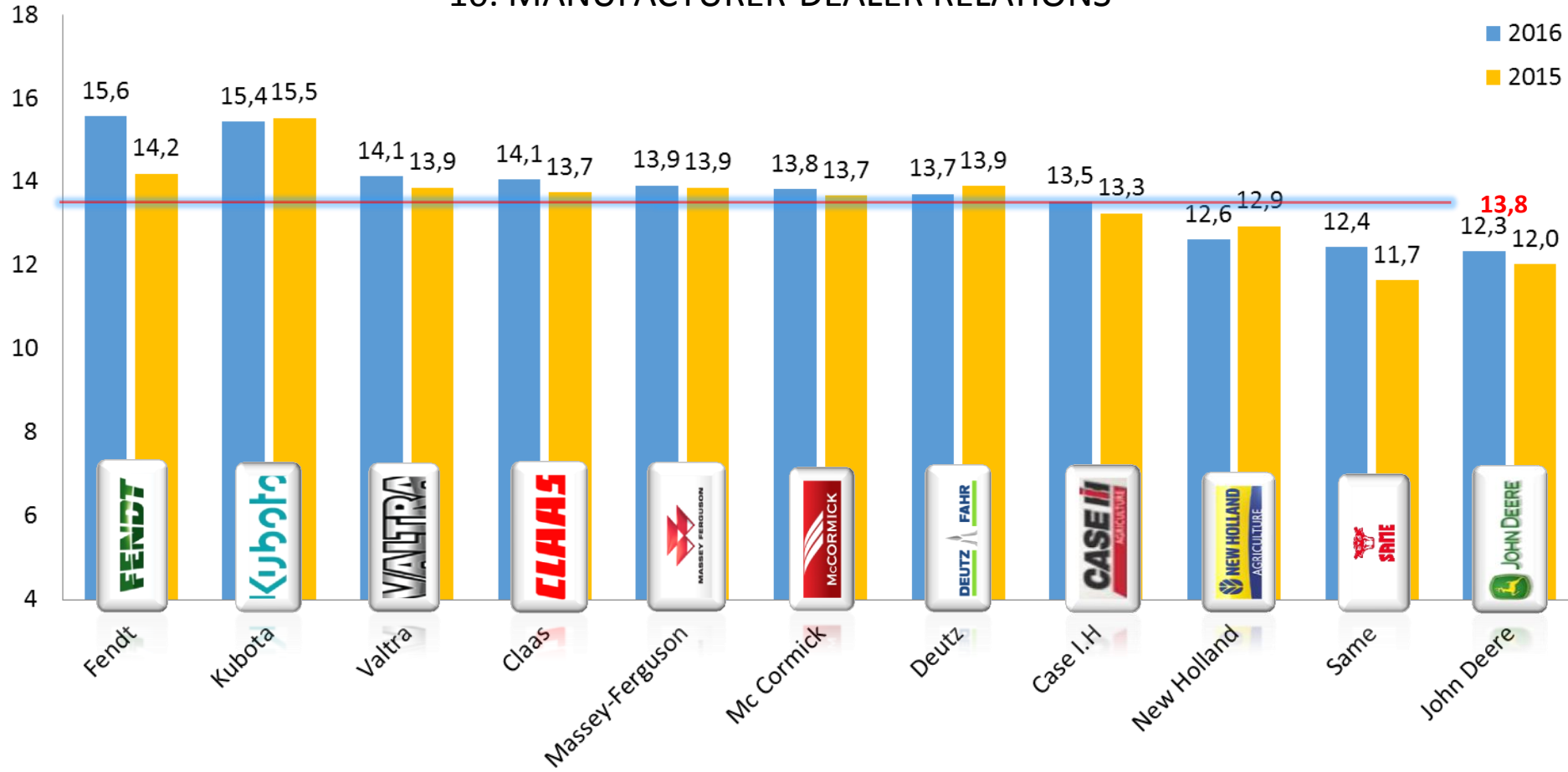
### 8. TRAINING



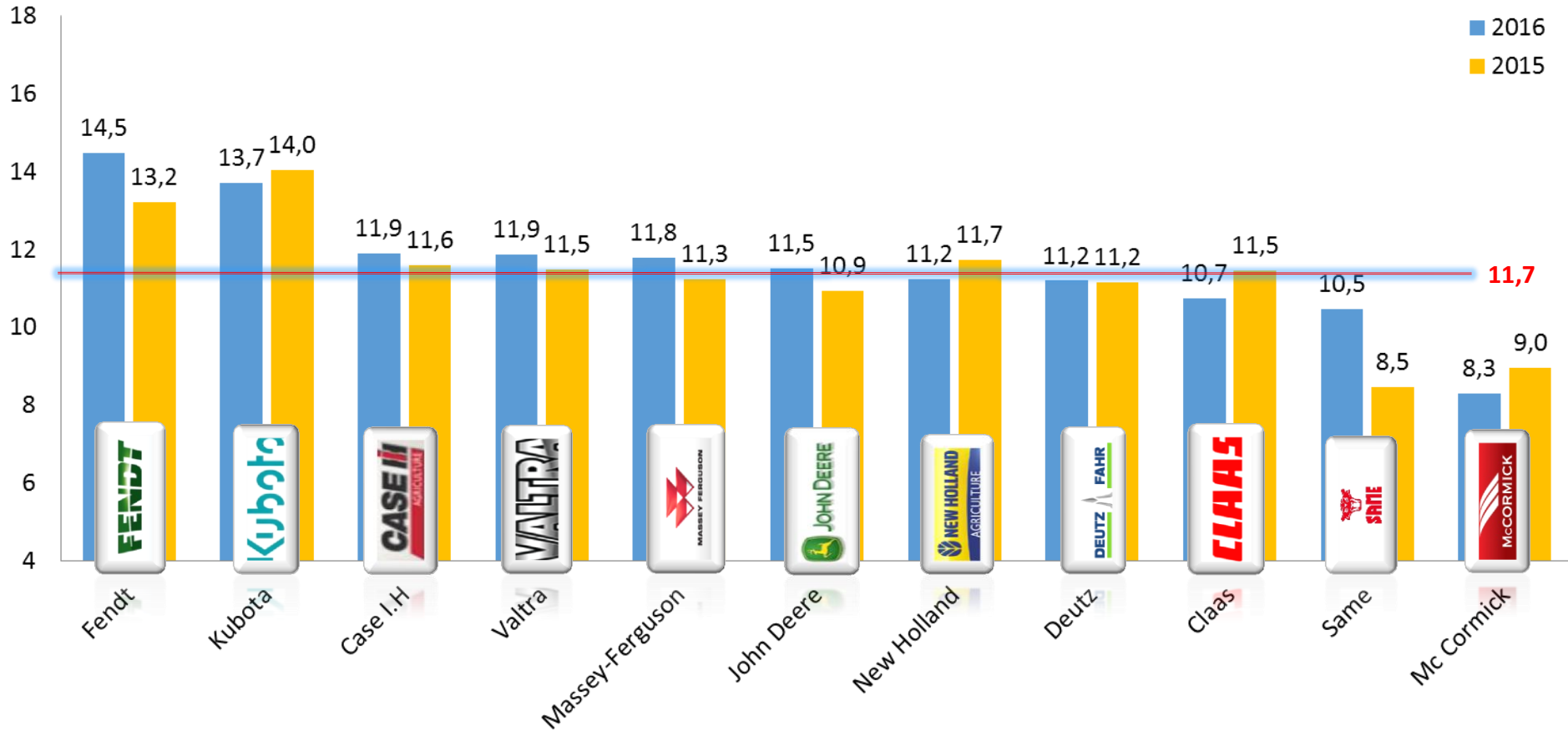
### 9. THE MANAGEMENT



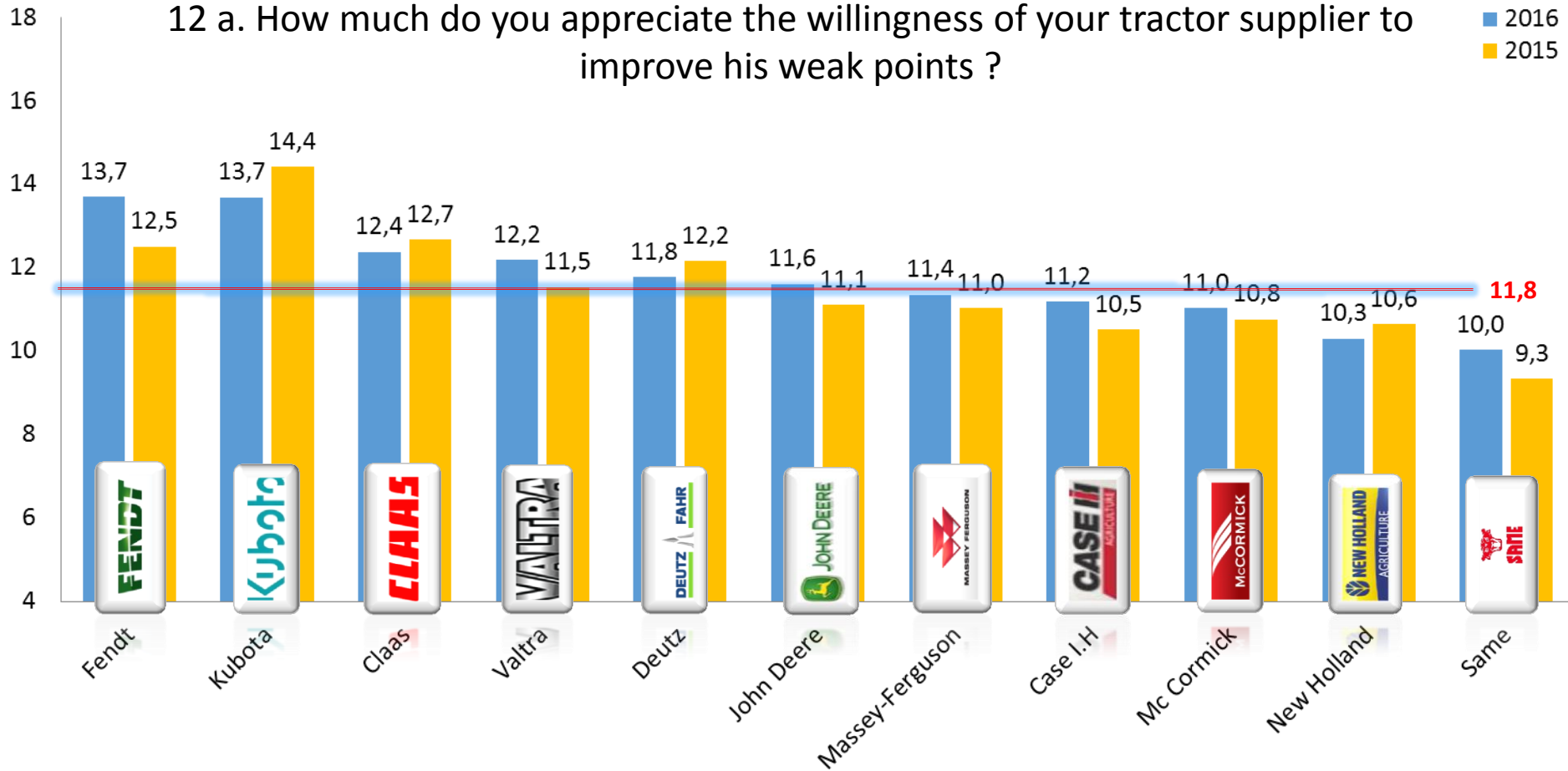
### 10. MANUFACTURER-DEALER RELATIONS



### 11. PROFITABILITY CONTRIBUTION

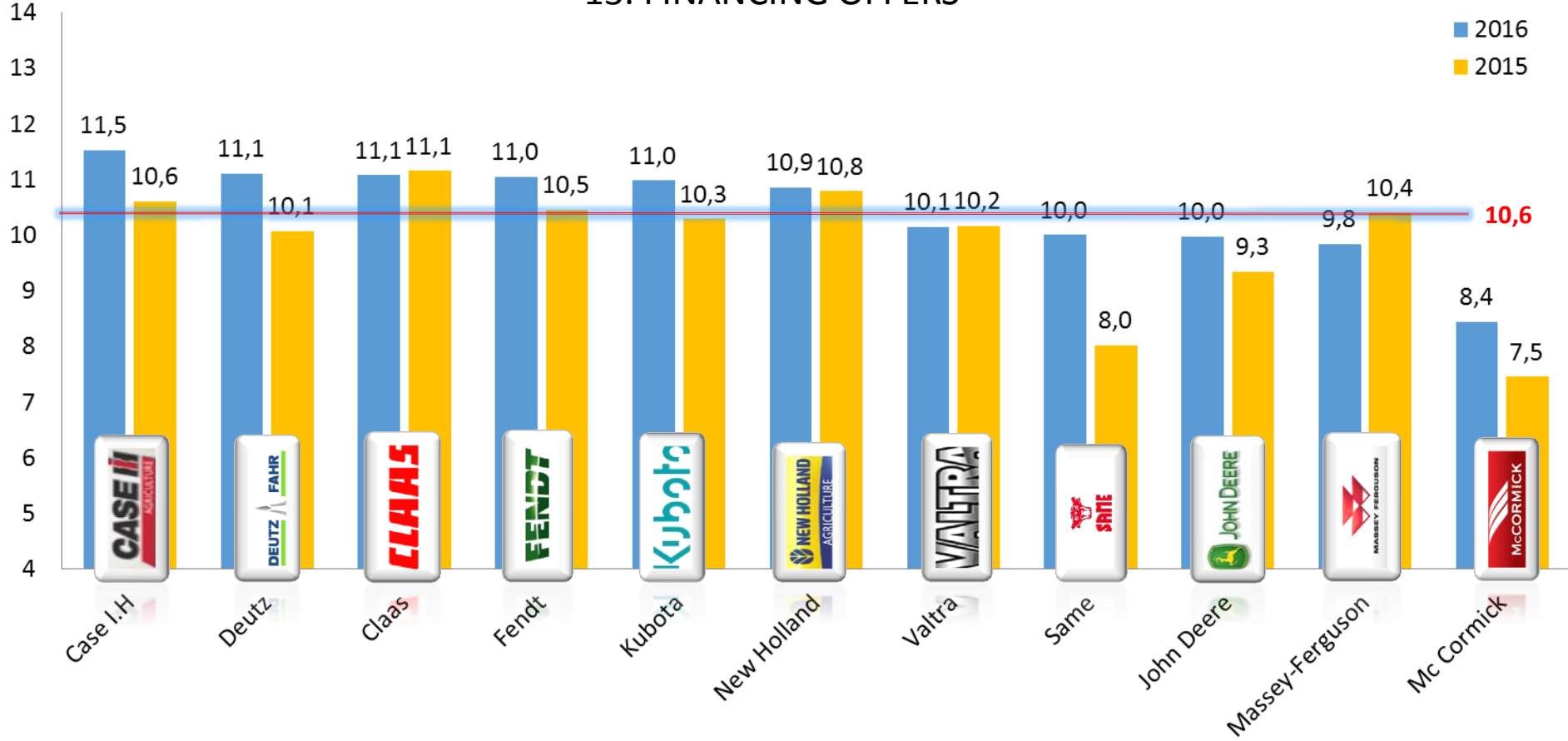


## 12 a. How much do you appreciate the willingness of your tractor supplier to improve his weak points ?

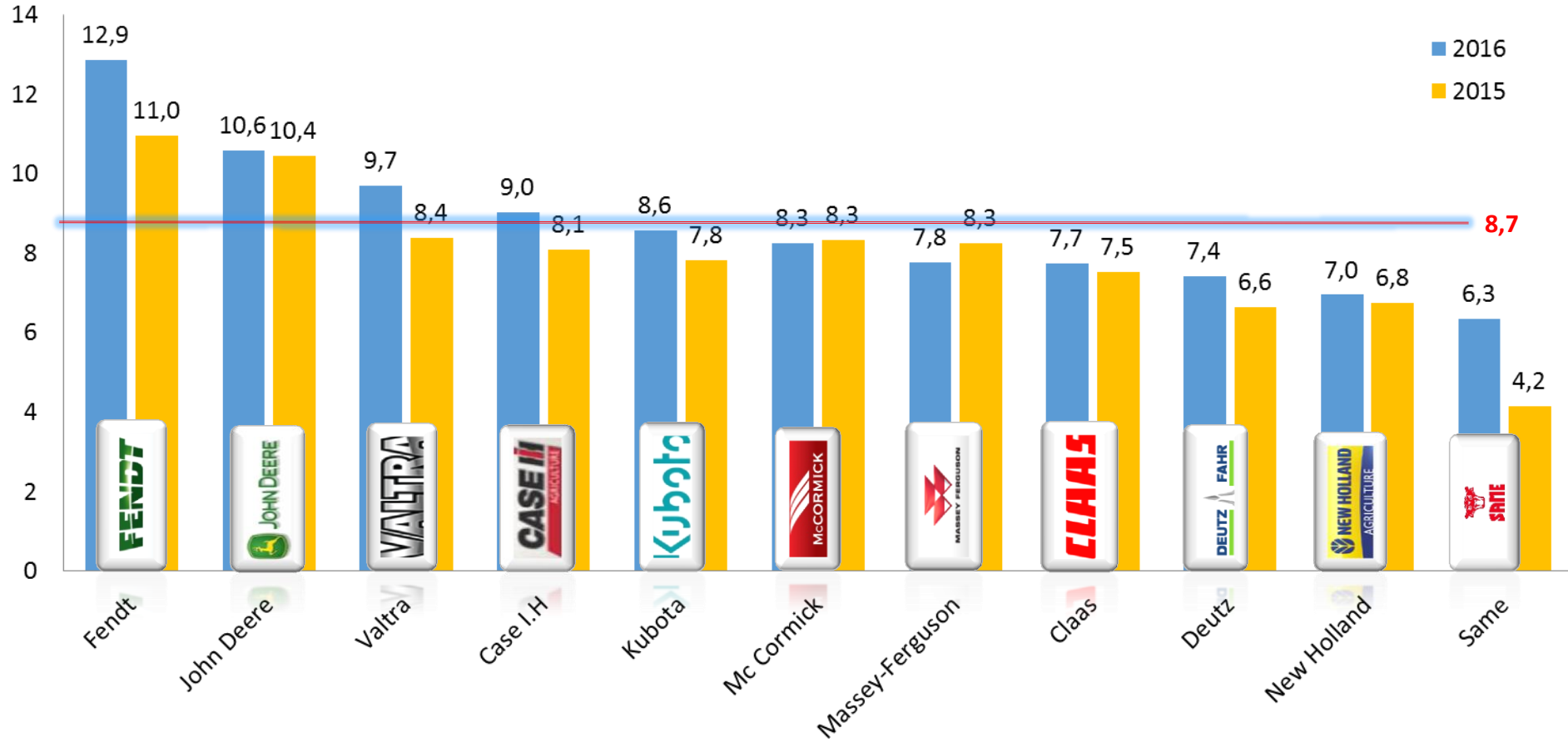




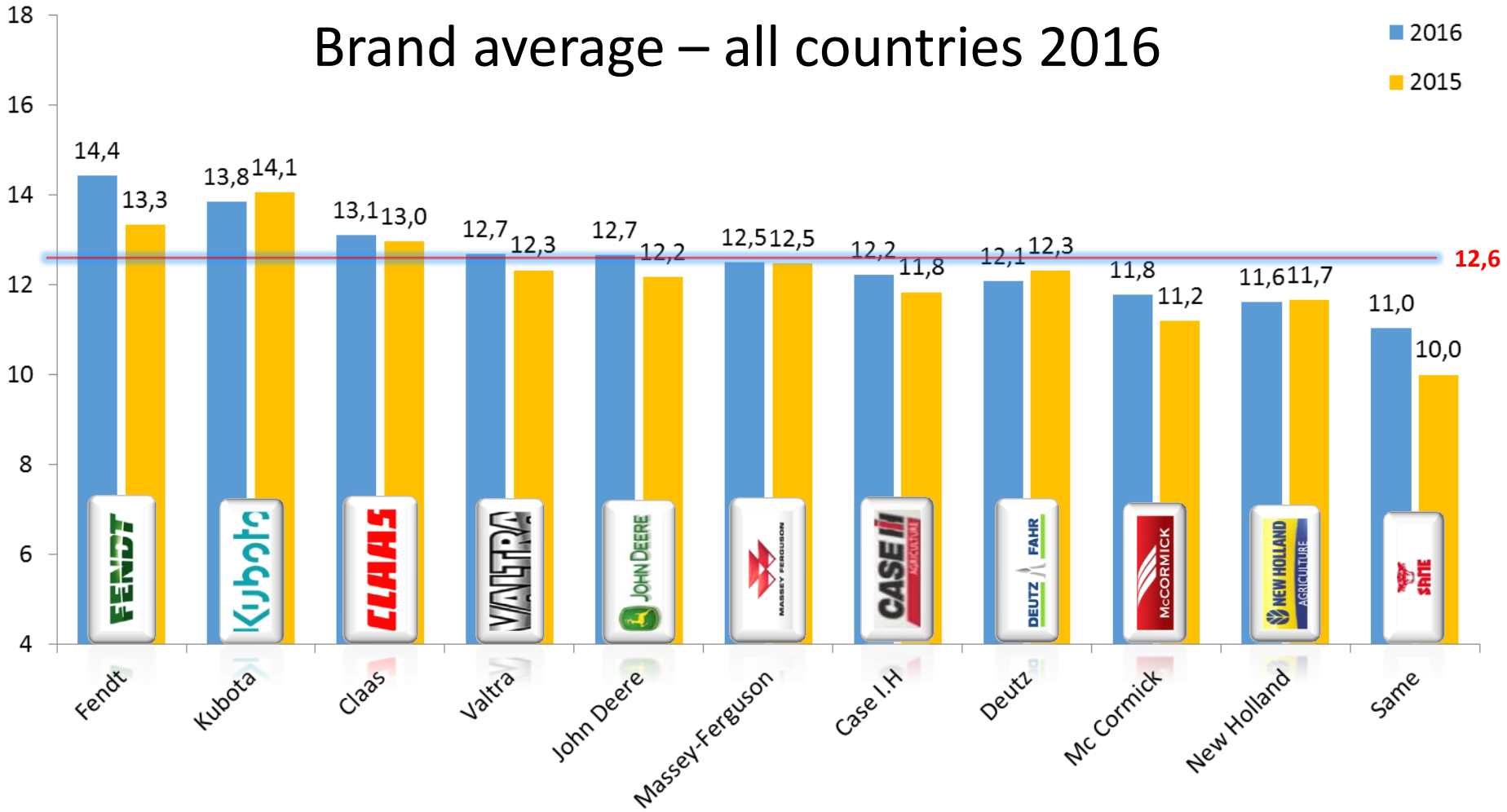
### 13. FINANCING OFFERS



### 14. THEFT PROTECTION



# Brand average – all countries 2016



## Strategic goal 4: At least five new members of CLIMMAR

- As per 1 January 2016 CLIMMAR welcomed the Slovak Association of Agricultural Technology Suppliers (AGRION) as new member.



[www.agrion.sk](http://www.agrion.sk)

- The Chinese Agricultural Machinery Distribution Association (CAMDA) participated in the last CLIMMAR Congress in Venice as a prelude towards CLIMMAR membership




**CAMDA**

[www.camda.cn](http://www.camda.cn)

## **Strategic goal 4: At least five new members of CLIMMAR**

### Potential contacts:

- RUSSIA AXCOD
  - NORWAY MGF
  - IRELAND FTMTA
  - PORTUGAL ACAP
  - ICELAND VELFANG
  - USA NAEDA
- 
- REGIONAL COUNCIL OF AGRICULTURAL MACHINERY ASSOCIATIONS IN ASIA AND THE PACIFIC (RECAMA)



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

[WWW.CLIMMAR.COM](http://WWW.CLIMMAR.COM)