



# WELCOME TO CLIMMAR!

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



16 members!  
19.185 dealers!  
158 799 employees!





# CLIMMAR Press Conference at the EIMA 2021

**Introduction to the highlights of CLIMMAR-  
activities in 2021**



# Board of CLIMMAR

President: Erik Hogervorst  
Vice President: Roberto Rinaldin  
Vice President: Ludger Gude  
Vice President: Pierre Prim  
General Secretary: Jelle Bartlema



ERIK



ROBERTO



PIERRE



LUDGER



JELLE



## **The highlights:**

- **Towards a new CLIMMAR in 2022**
- **The Branchreports & CLIMMAR Index**
- **The EU results DSI 2021**
- **Lobby activities CLIMMAR**



# **Towards a new CLIMMAR in 2022**



# The Future of CLIMMAR project

## Preamble:

In the recent years CLIMMAR more and more became involved into advocacy and lobby activities within the European regulatory circuit. Being involved into several “lobby files” the CLIMMAR activities are becoming more “external oriented”. Good relations with relevant stakeholders (such as other European sector organizations and the EU institutions) are of the utmost importance. This new profile of CLIMMAR’ activities requires a professional organization. An organization with legal identity, based in the heart of the EU regulatory circuit and able to effectively express and bring forward the view of the European dealerships in relevant issues at stake.

In order to achieve this the members of CLIMMAR decided on the following actions to take:

1. Organise a professional independent and steady working secretariat.
2. Homebase the secretariat in Brussels
3. Establish a legal identity for CLIMMAR
4. Renew the statutes to make this possible and make CLIMMAR ready for his role



# The Future of CLIMMAR project

## Working Group on the Future of CLIMMAR:

- A special Working Groups was installed to take up the task to formulate an integrated proposal for the Future of CLIMMAR.
- The Group consists of representatives from 7 CLIMMAR member countries (France, Germany, Italy, UK, The Netherlands, Denmark and Czech Republic).
- During the latest General Assembly of CLIMMAR, which was held on the 7<sup>th</sup> and 8<sup>th</sup> of October 2021 in Amsterdam, the first historical steps were made by the members of CLIMMAR:
  - the adoption of the new proposed Statutes of CLIMMAR which forms the basis for the new CLIMMAR.
  - Approval of the members of CLIMMAR to make the necessary steps towards a home base in Brussels with a permanent CLIMMAR secretariate.

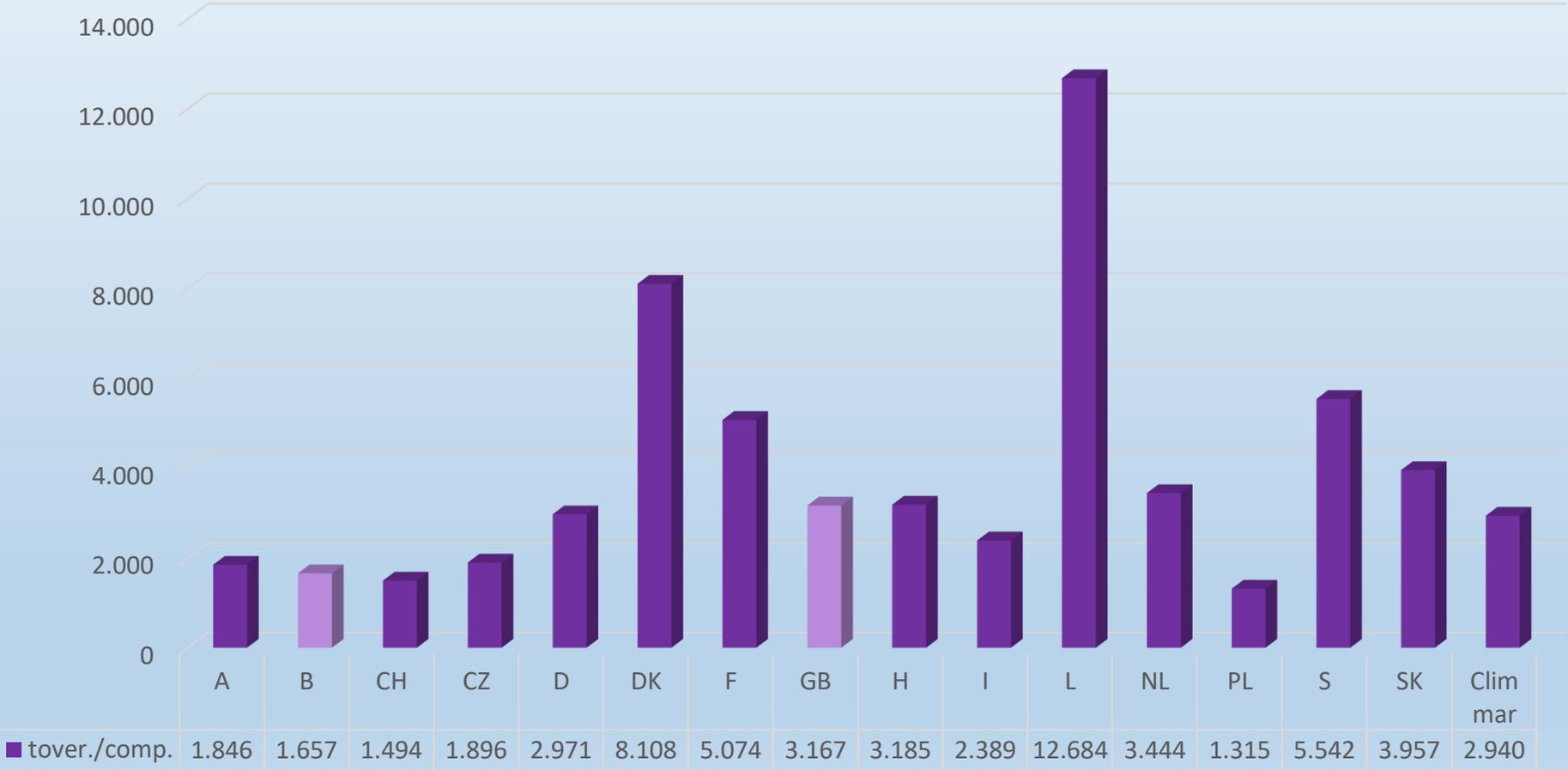
Approval by the CLIMMAR members on the plans for the Future of CLIMMAR at the General Assembly meeting of 7<sup>th</sup> and 8<sup>th</sup> October 2021 in Amsterdam





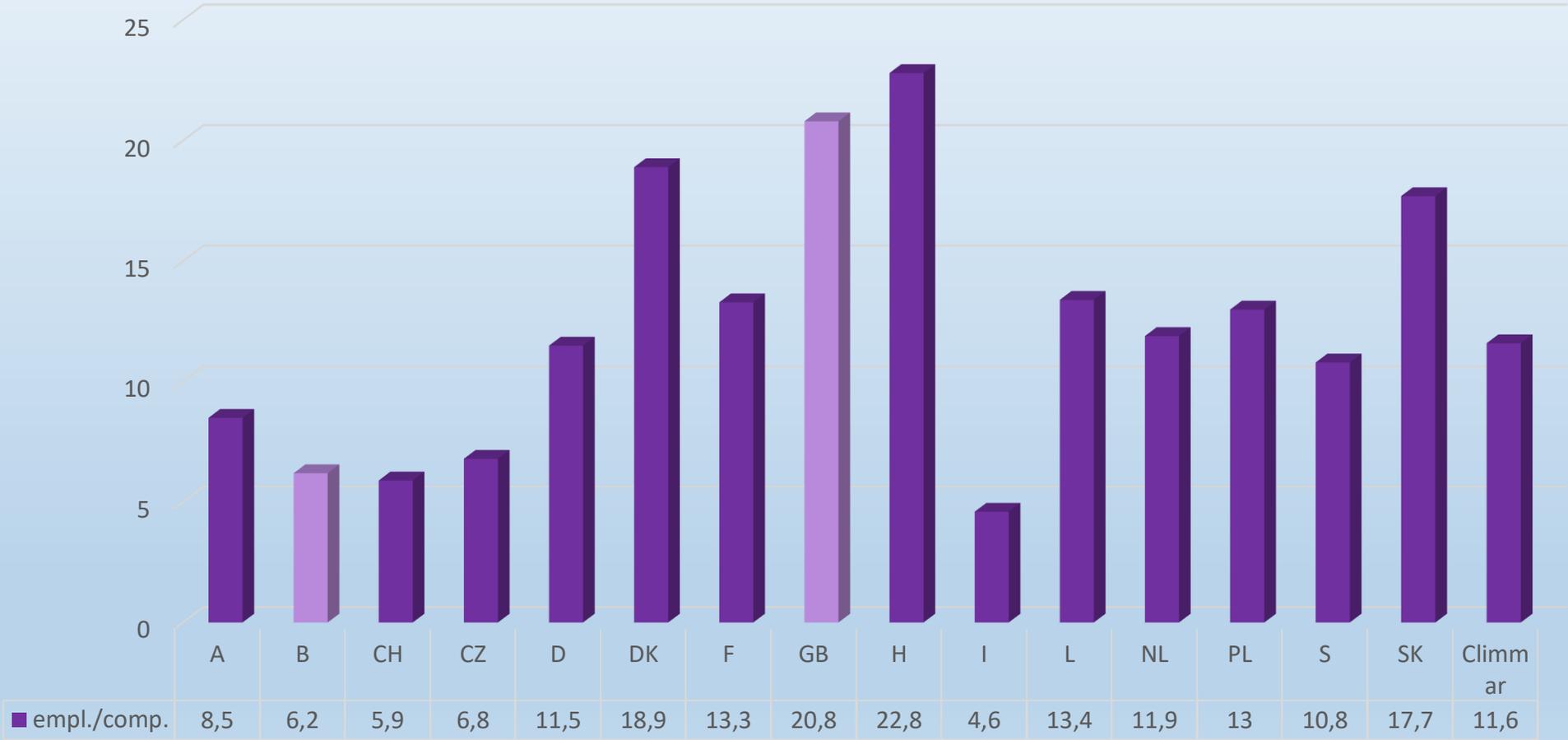
# **The Branchreports & CLIMMAR Index**

Relations - Turnover per Company: **2,940** T€/comp.



Source: CLIMMAR

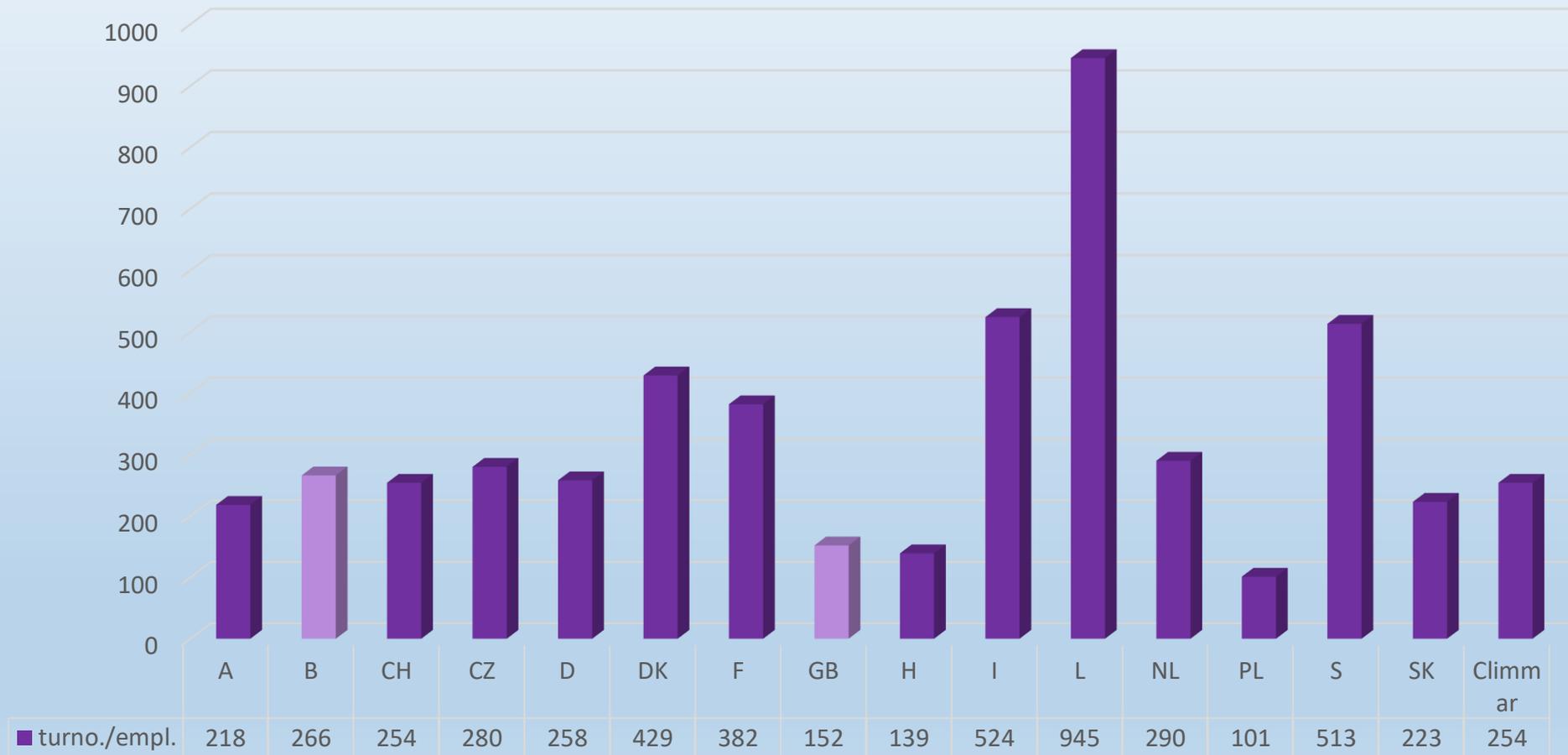
### Relations - Employees per Company: **11.6**



Source: CLIMMAR

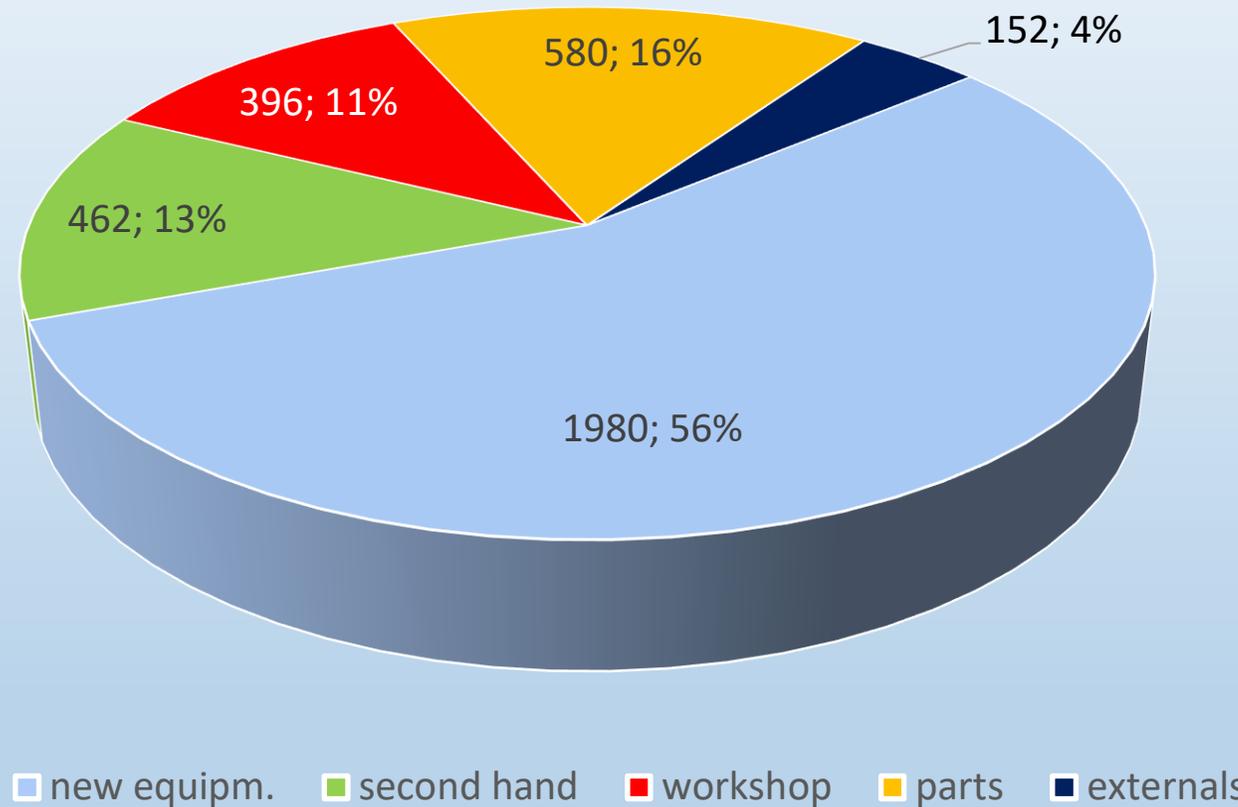


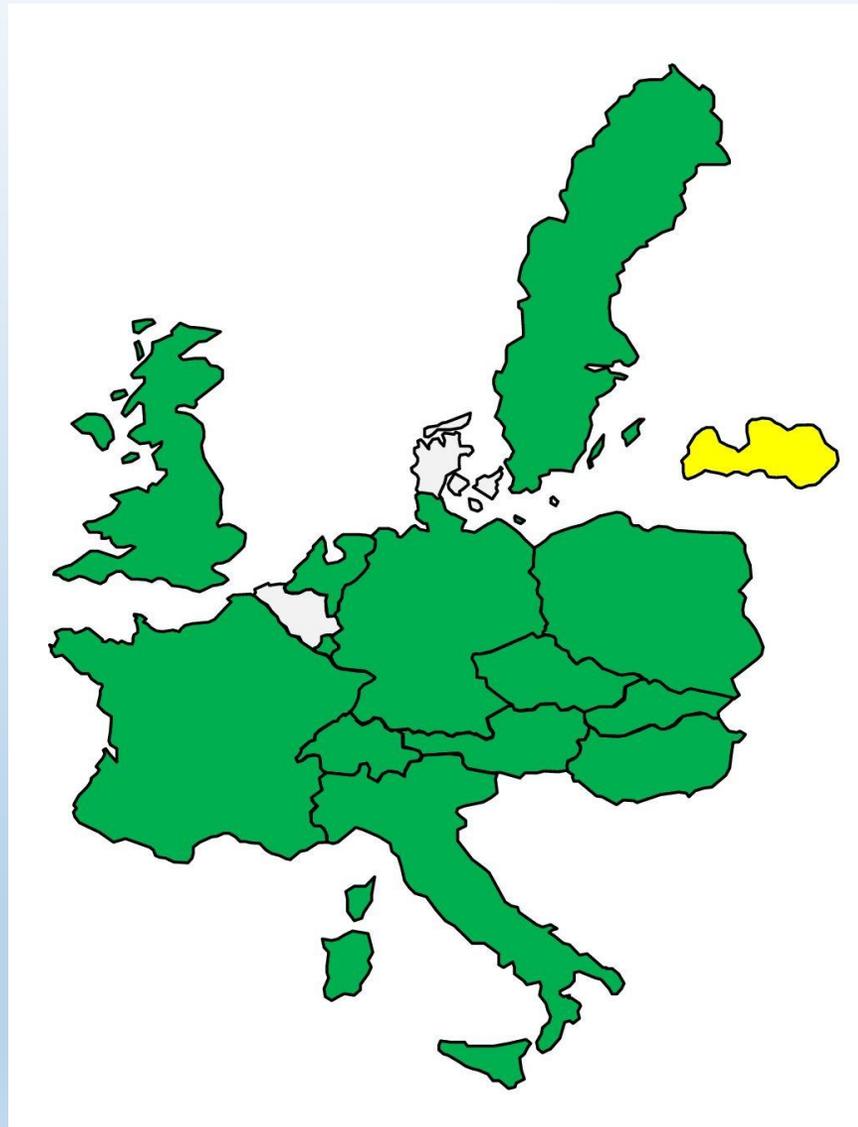
Relations - Turnover per Employee: **254,000** €/pers.



Source: CLIMMAR

## turnover-structure of the average CLIMMAR-dealer

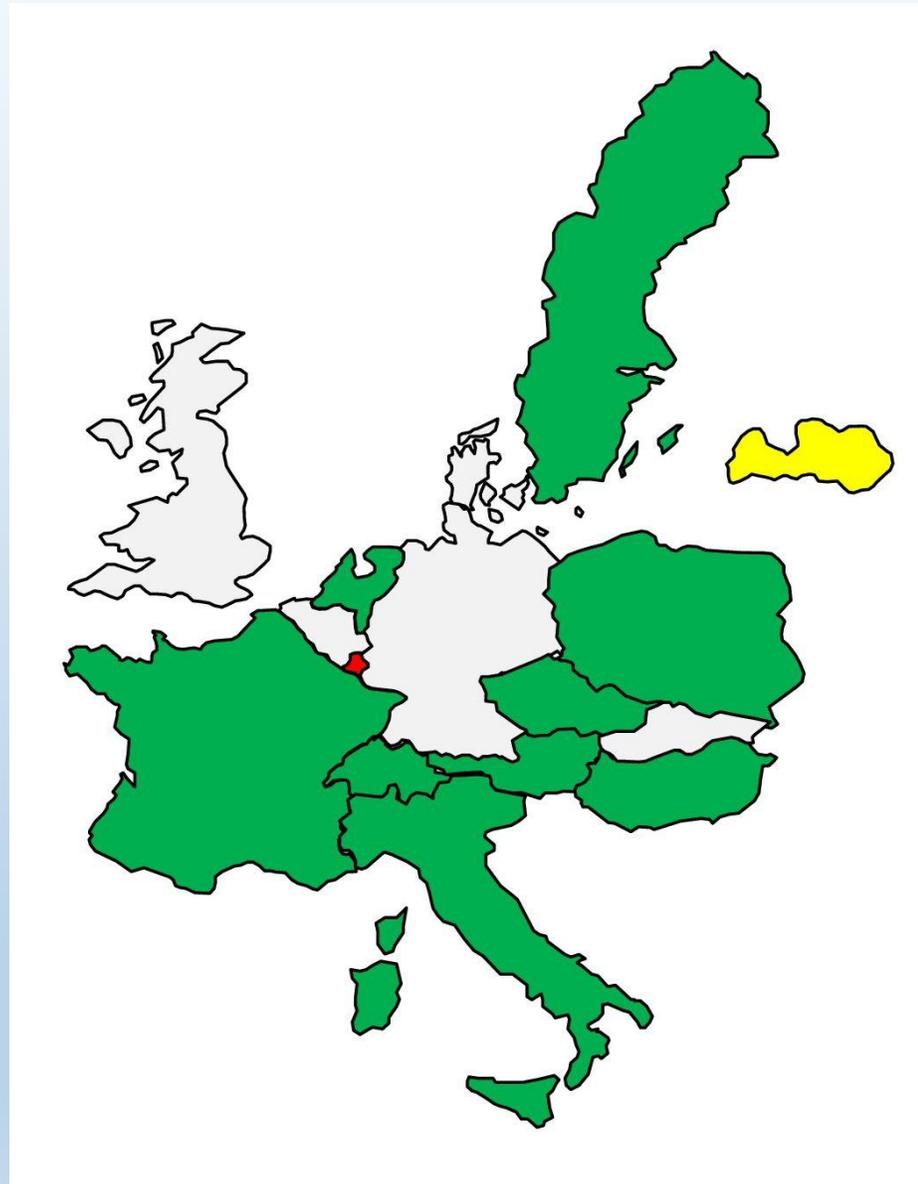




## Turnover total

**development** of turnover in the first half of 2021 compared with the same period 2020:

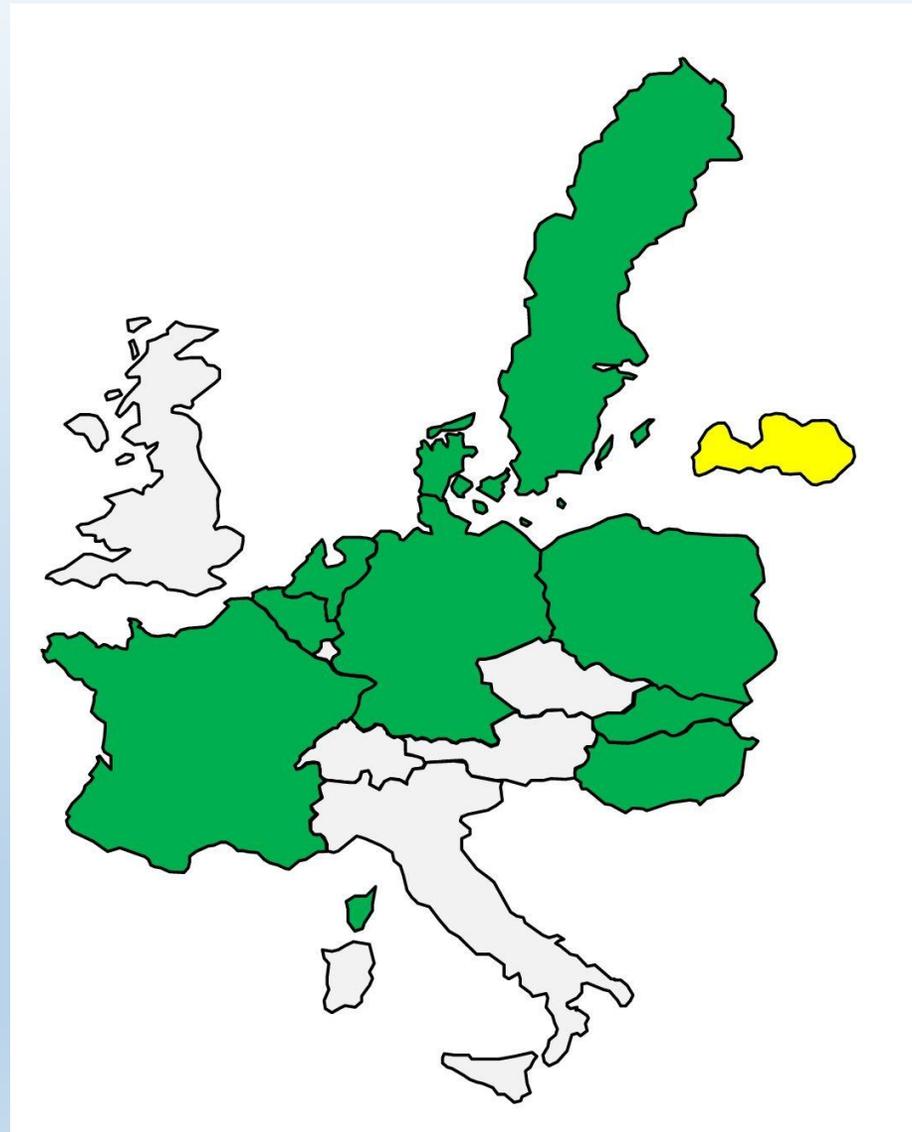
- less / worse / decrease
- equal
- more / growing / increase
- no answer



## Turnover new equipment

development of turnover in the first half of 2021 compared with the same period 2020:

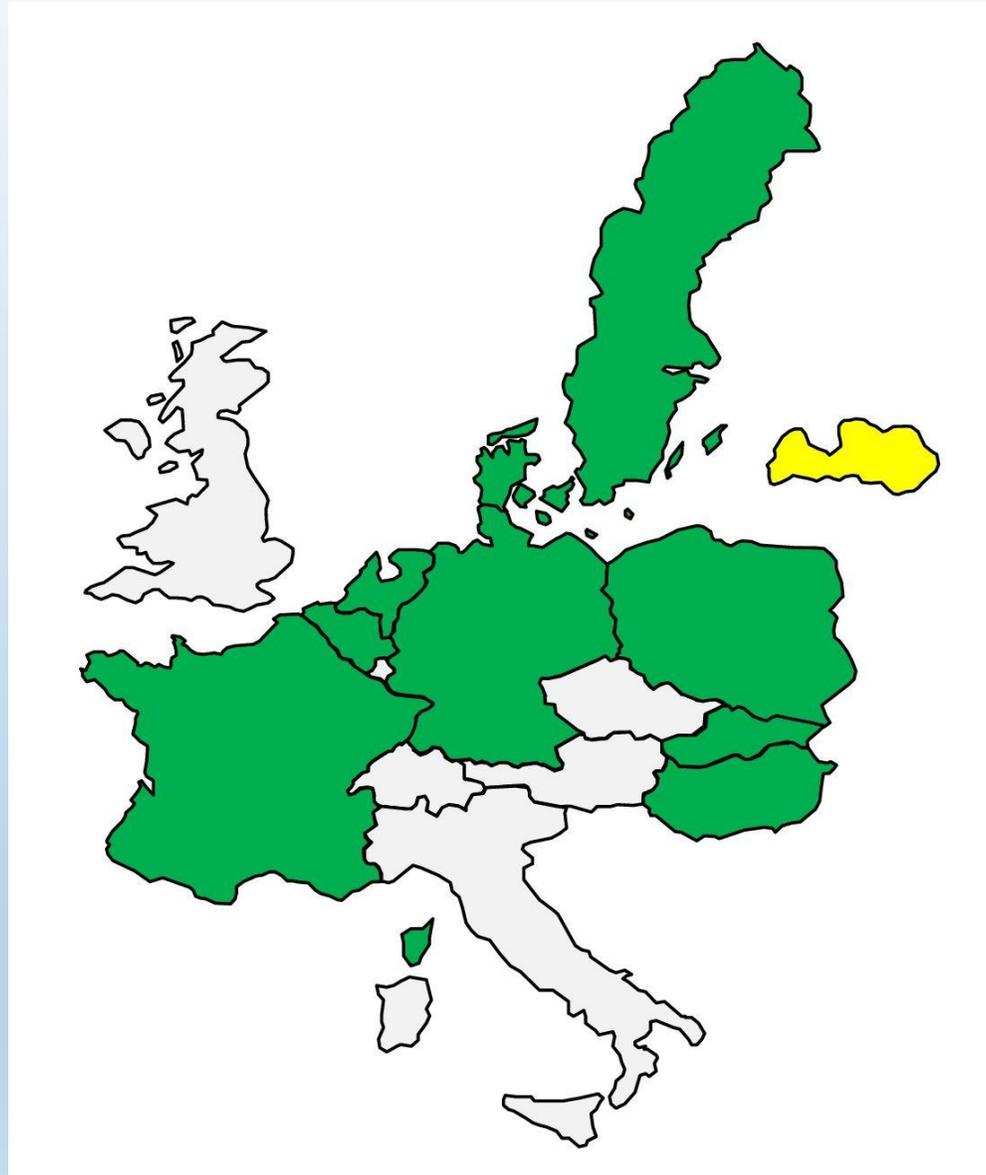
- less / worse / decrease
- equal
- more / growing / increase
- no answer



## Turnover workshop

development of turnover in the first half of 2021 compared with the same period 2020:

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



## Turnover spareparts

development of turnover in  
the first half of 2021  
compared with the same  
period 2020:

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

### CLIMMAR-Index:

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





# The EU results DSI 2021

11th survey



CLIMMAR  
Centre de Liaison International  
des Marchands de Machines Agricoles  
et Réparateurs

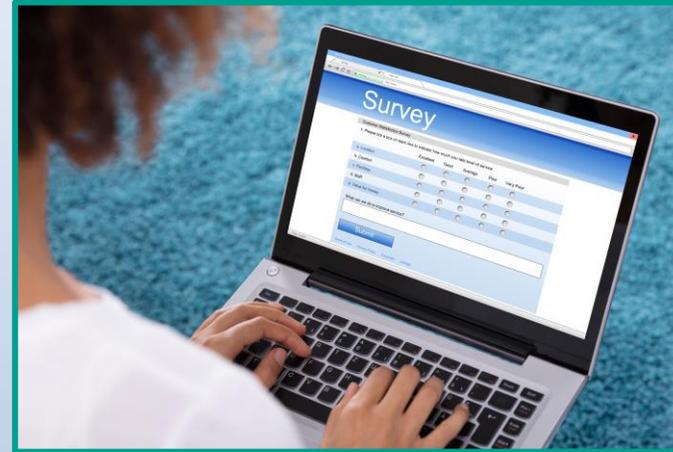


# ONLINE SURVEY



Start : april 2<sup>nd</sup>

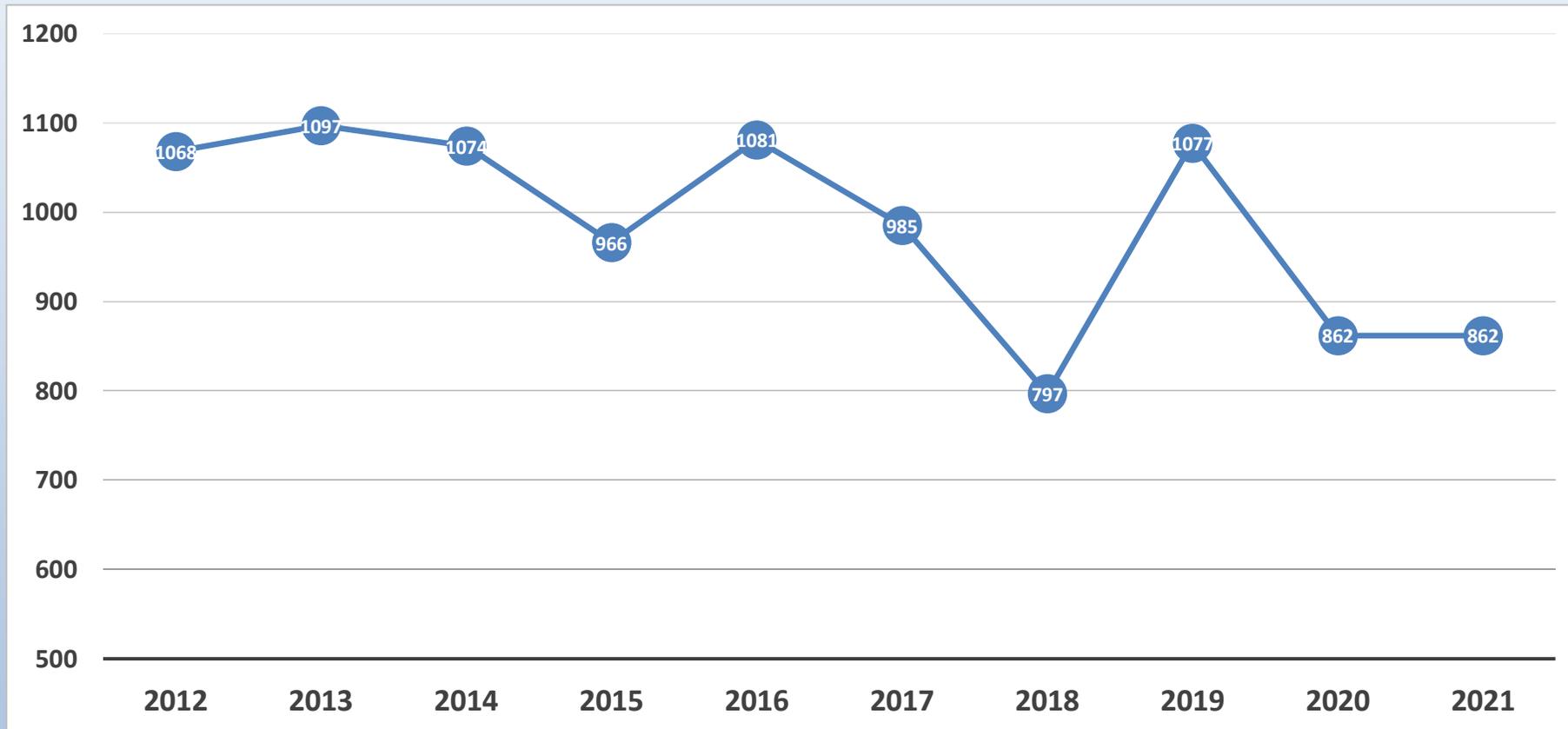
End : May 25th



9 countries included



# Participation





## PART II

## 2021 RESULTS /2020



# 14 main topics in the DSI questionnaire

- 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

Overall average for each brand



# AVERAGE FOR BRAND IMAGE

Trend : 2021/2020

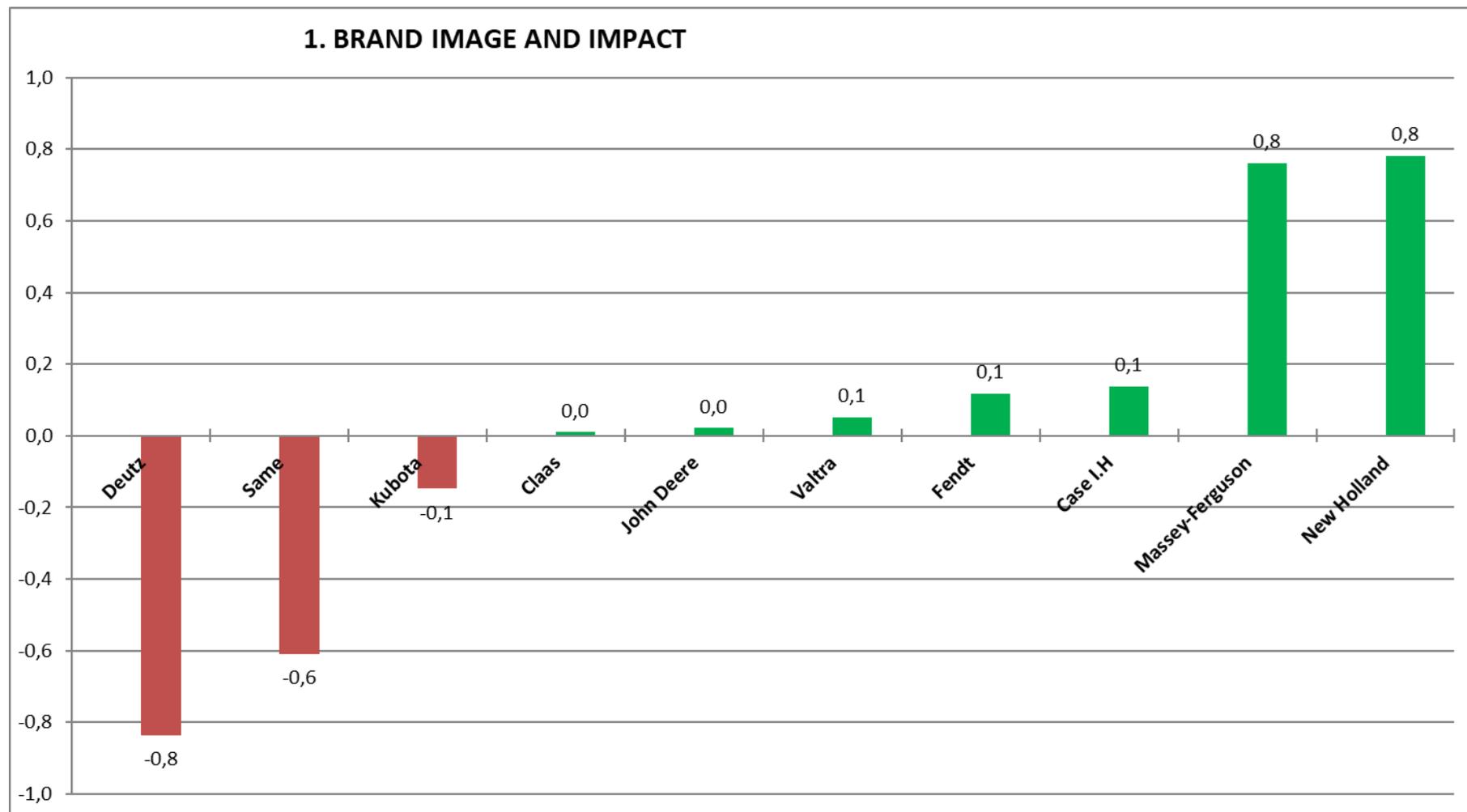


Average figure

2021



2020





# AVERAGE FOR TRAINING

Trend : 2021/2020



Average figure

2021

2020





# AVERAGE FOR MANUFACTURER-DEALER RELATIONS

Trend : 2021/2020



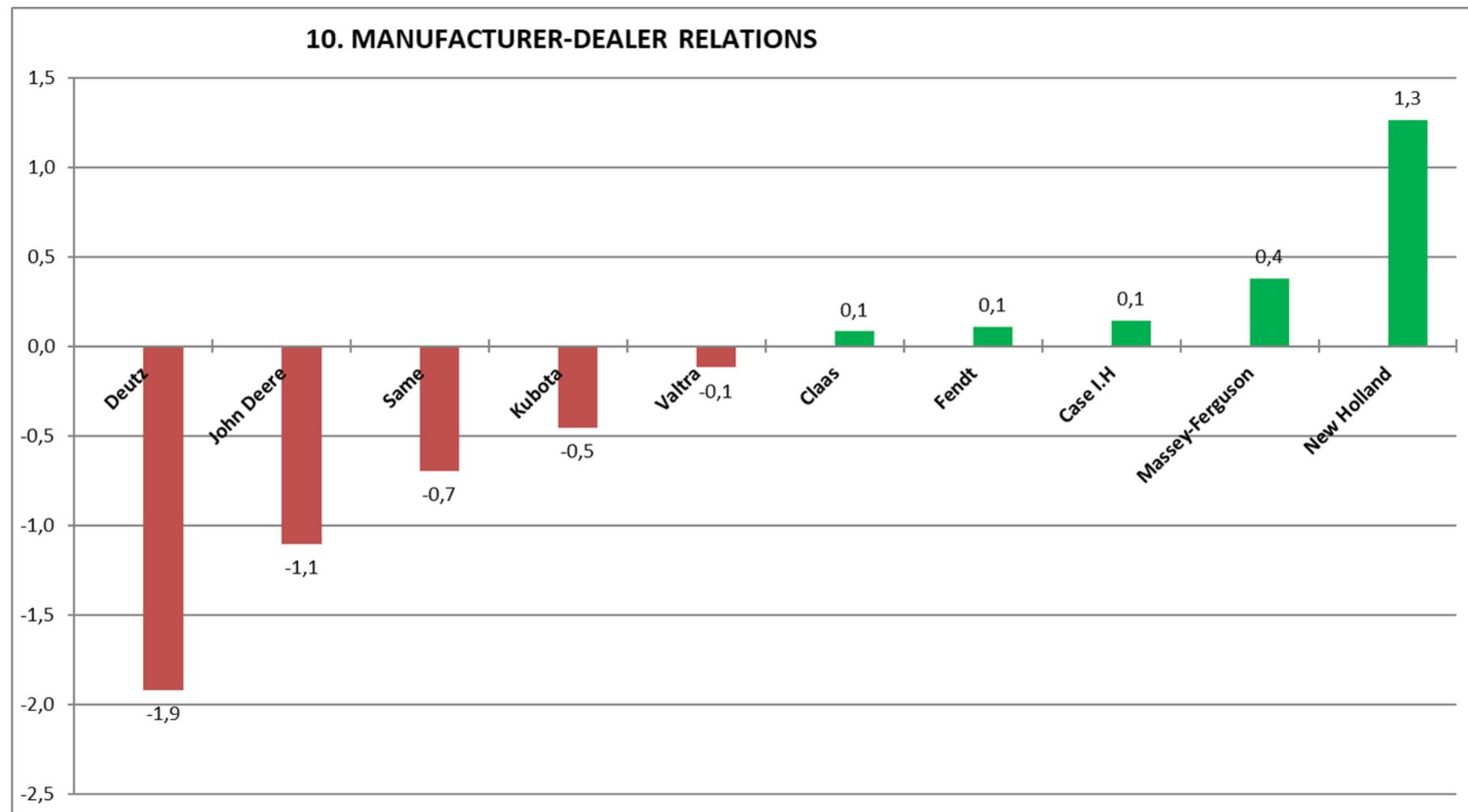
Average figure

2021

2020

13,7

13,9





# AVERAGE FOR PROFITABILITY CONTRIBUTION

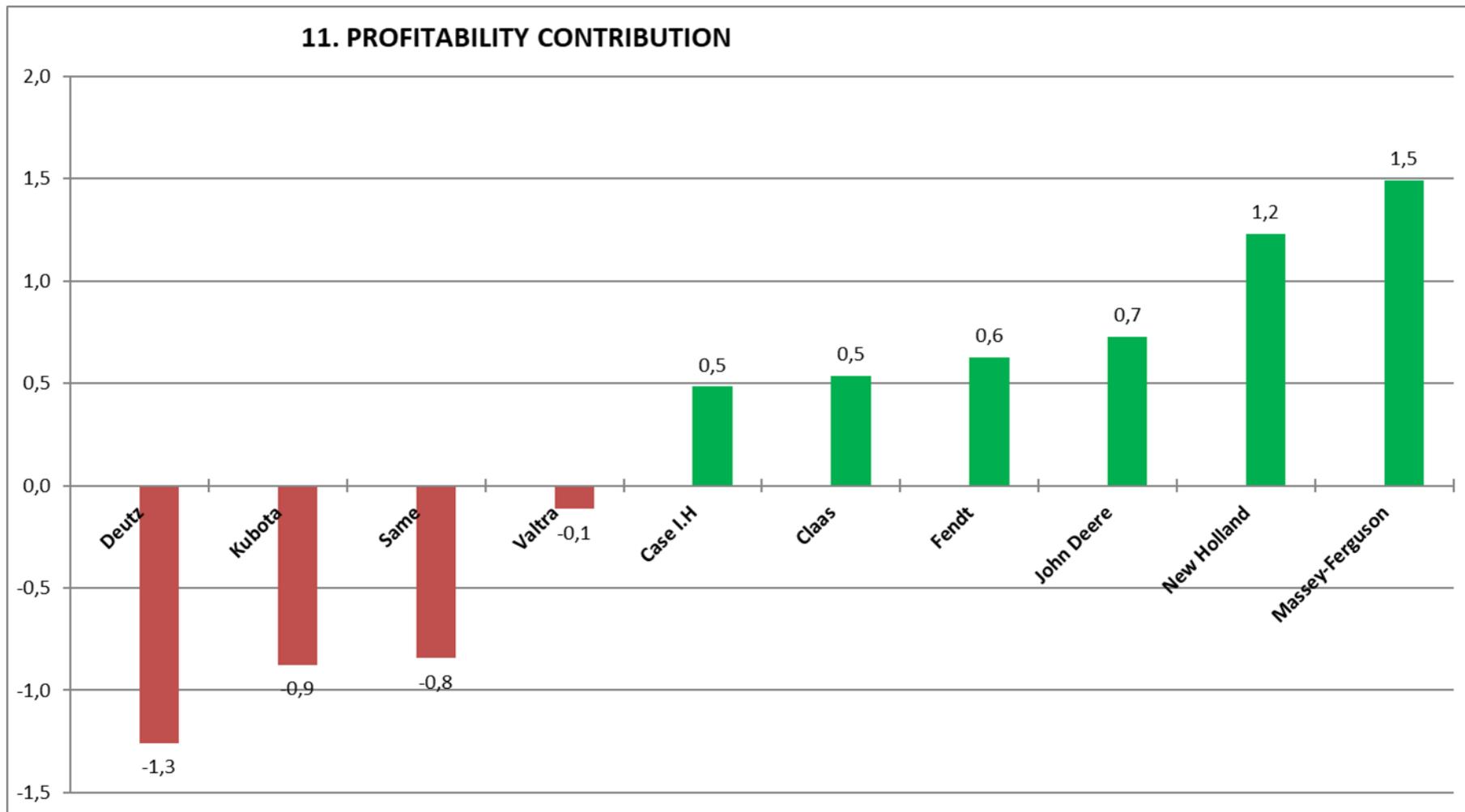
Trend : 2021/2020



Average figure

2021

2020





# AVERAGE FOR IMPROVEMENTS

Trend : 2021/2020



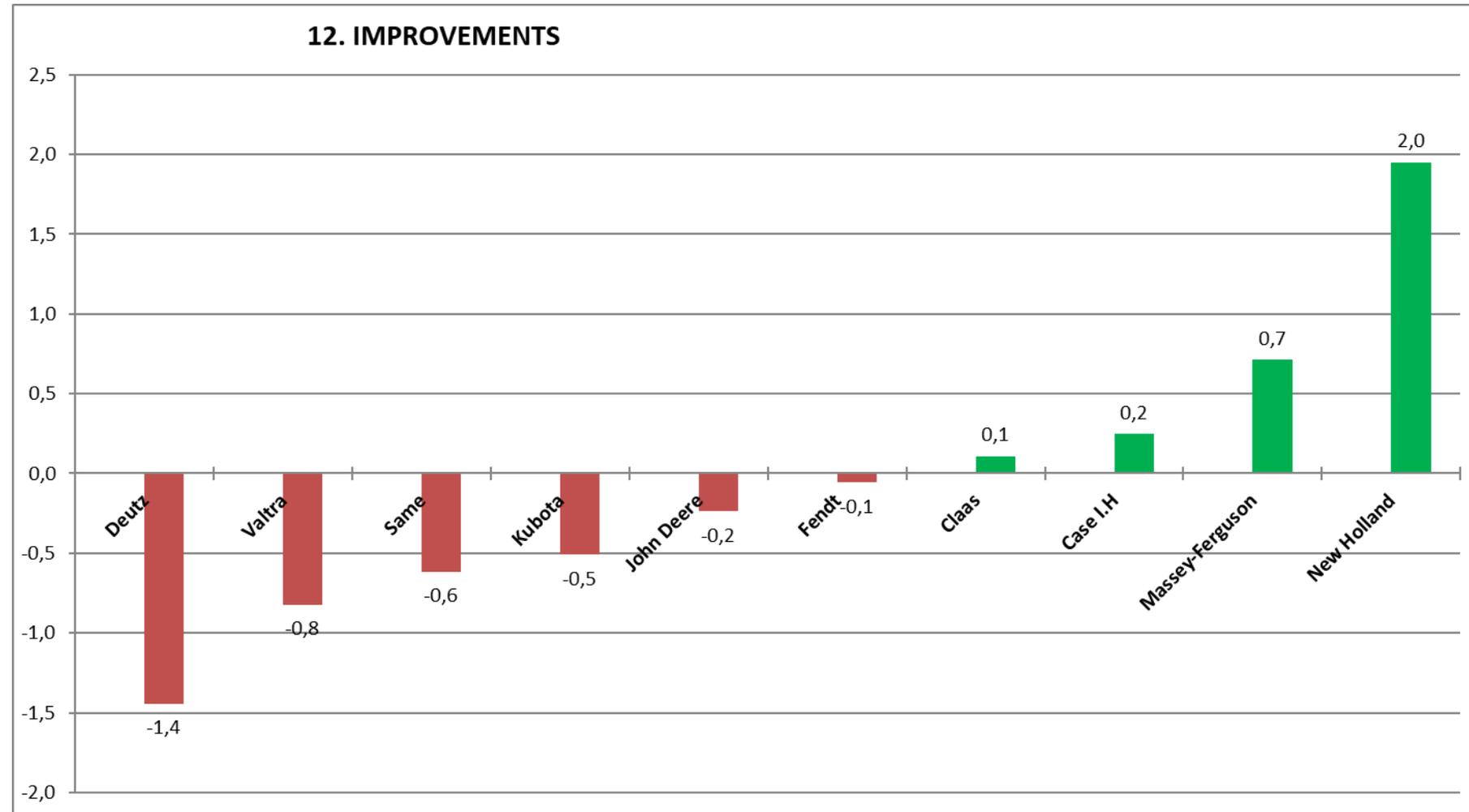
Average figure

2021

2020

12,3

12,3





# AVERAGE FOR THEFT PROTECTION

Trend : 2021/2020

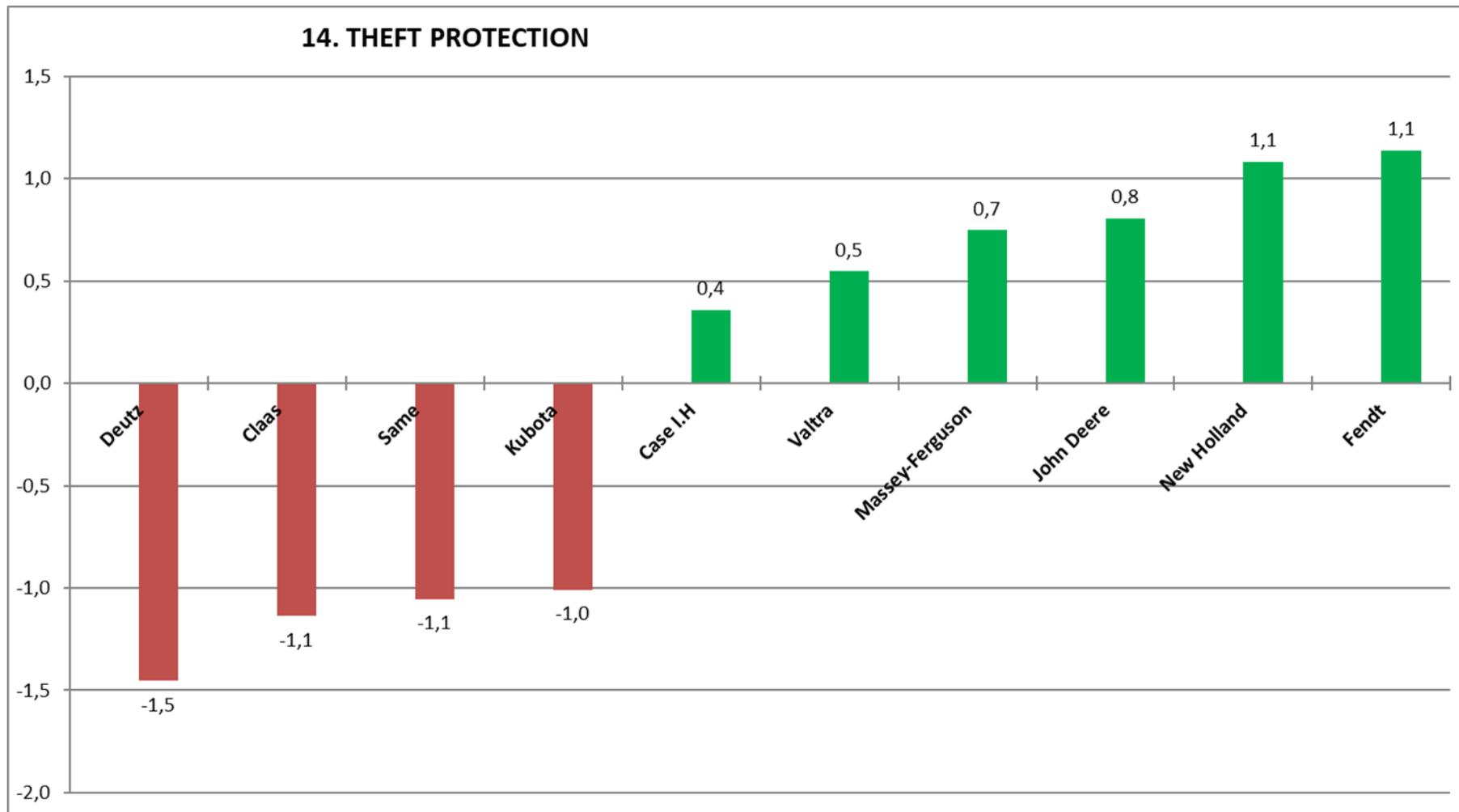
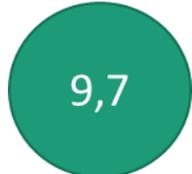


Average figure

2021



2020



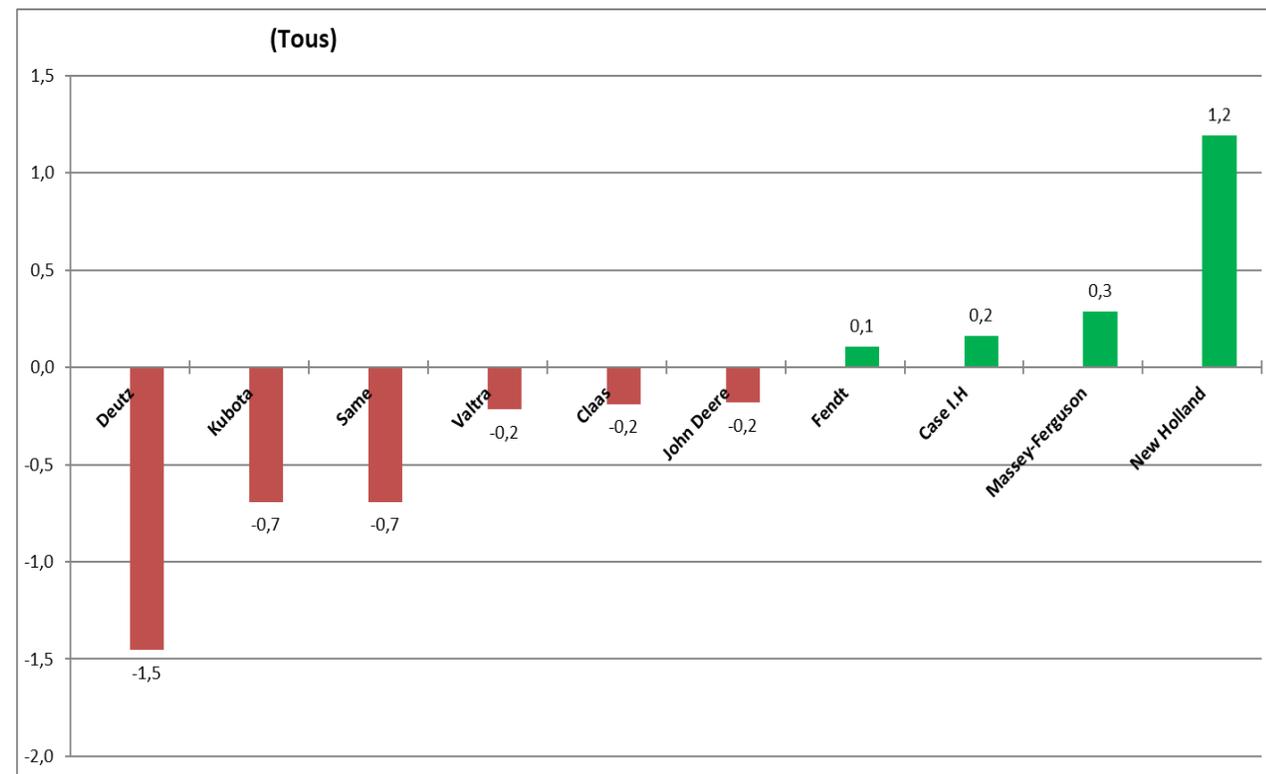
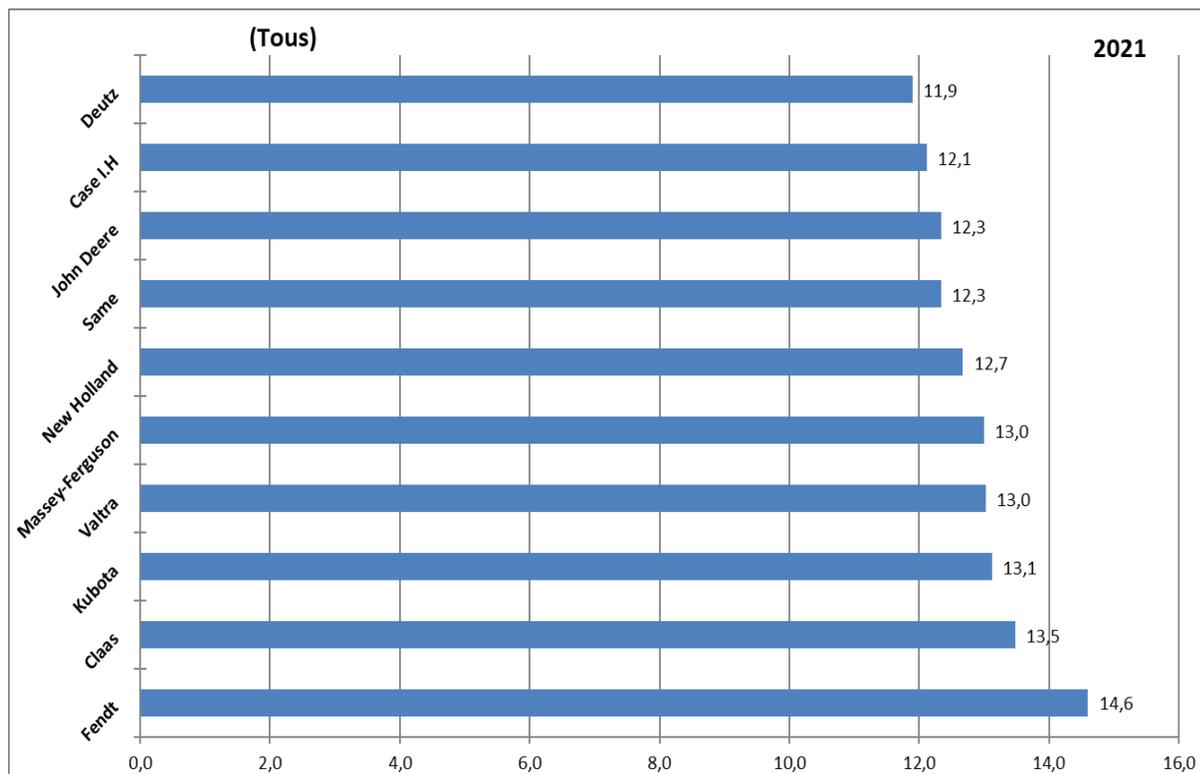
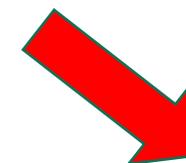


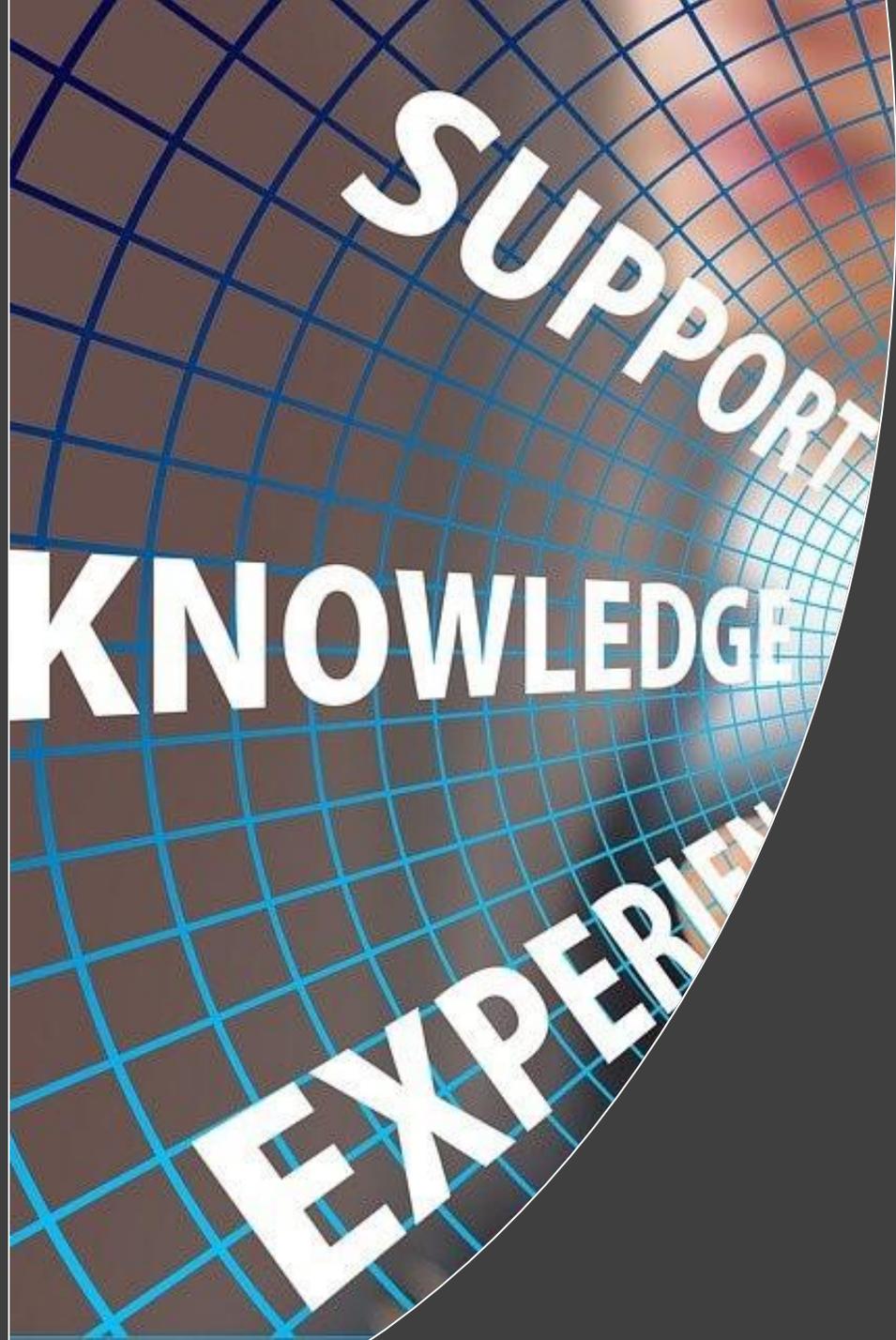
# OVERALL AVERAGE FOR EACH BRAND

Average figure



Trend : 2021/2020





CONCLUSION



**CLIMMAR is active in several lobby files at the European and international level**



# Repair and Maintenance Information (RMI)

- The lobby work within the ISO Working Group for this important file is finished, and as a result the working group has been laid down and now longer exist since beginning 2021.
- The result of this work is that new tractor models (or facelift) introduced after 1 July 2021 must have at least one diagnostic plug that complies with SAE J1939-13 (type 1 or 2), an ISOBUS diagnostic plug or a correct OBD II power plug, so it is possible to read error codes, erase error codes, connect new spareparts and calibrate to the vehicle. For that tractor model, the RMI portal must also work according to the ISO standard.
- CLIMMAR is very curious about the experiences with the standard once the vehicles first come to dealer's workshops for repair and/or maintenance later this year!



# EU Working Groups

## WGAT – Working Group Agricultural Tractors

- Approval and market surveillance of Ag and Forestry vehicles at national level > allowing vehicles with larger masses and dimensions than those stipulated in EU Regulation 167/2013. CLIMMAR together with CEETTAR and COPA-COGECA requested for adding optional further technical data: Eg. Vehicle width wider than 3m and/or higher axle mass than 10 ton.
- In this Working group CLIMMAR learned about the possibility to participate in OECD Sub-Working Groups:
  - Regarding Electrical tractors / machinery
  - Regarding Robot tractors / machinery



# OECD Sub Working Group on Electrical Tractors

## *Introduction of CLIMMAR' involvement to the OECD*

This whole subject of electrification of heavy duty machinery is become more important in the coming years. You see some small initiatives already to transform traditional (diesel) engines of machinery into electrical and / or hydrogen machines.

This is all done in the light of the urgent need to reduce the CO2 emissions.

We hear as example from The Netherlands - that most “frontrunners” in this matter are governmental organizations (cities; local communities, provinces and the central governmental organizations). They are asking more and more for these kind of machinery in the light of Climate measurements.

But this transition is still very small and companies who are in the business of transforming machinery into electrical / hydrogen are still limited. But it is definitely a trend which will continue to grow.

This means that more knowledge of these kind of new machine technology is needed, not only from the producers point of view, but also on the education, servicing, maintenance and safety point of view.

As a mechanic you really have to know what you are doing when you maintain or repair these new technologies, since the risks are very high with the high voltage and quite a few amperes - which are used for these kind of machines. (it is lethal if you don't know what you're doing..)

So it would be wise if at least at the policymaking level and standardization level this whole issue is given good attention and some thorough thought on how to deal with this trend.



## Questions asked by CLIMMAR to treat this item from the maintenance and servicing perspective.

- What will be the knowledge level of the future mechanics ? Will there be special training schemes necessary ?
- What are the preconditions for a dealer company to be able to service and maintain these kind of machinery in terms of special equipment required, special workplaces required, etc. ?
- What to be done when things are going wrong ? For example when a machine by accident catch on fire, what is needed to contain the fire since this is quite difficult in practice..?
- Will there be standards and regulations coming into place to “guideline” this trend ?
- What about the storage of many machines with batteries of newer kind like Li-ion, or hydrogen fueled machines ?

For the dealer to be able to recommend the best possible product and sell these newer technologies to the end users, according to the buyers expectations, it is important to know:

- how long the charging time is and what the options regarding charging are?
- On the electric/battery: What is the request to the power grid? How many volt? And Amperes? Cabling? Fire extinguishing equipment?
- Connectors? Operation time? Driving, PTO time? Electric outlet time? Battery Expected lifetime/cycletime?
- Hydrogen: Tank/fueling options? Storage requirements? Operation time?



Result of the CLIMMAR introduction:

*“ The Chair thanked CLIMMAR for sharing our view. The sub-working group will take good notice of the list of specifications highlighted and that could enrich the test reports. He also took the point on training. Electricity indeed induces high risks related to voltage and amperage. There are already agricultural machines on the market that have 100 kW of electricity output. It is good to train the testing stations’ testing staff too. The US agreed” .*

This now means a strong involvement of CLIMMAR into the OECD’ work on the trend of electrification of machines



# CLIMMAR is actively addressing relevant issues and topics to the policymakers in Brussels, often together with other relevant stakeholders

Joint request:



**CEMA – CEETTAR – CLIMMAR Joint Statement**

**Covid-19: agricultural machinery manufacturers, dealers and contractors urgently call for European pandemic response to cover machines with transition engines built in 2019.**



Positive result:

**REGULATION (EU) 2021/1068 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL  
of 24 June 2021**

**amending Regulation (EU) 2016/1628 as regards its transitional provisions for certain machinery fitted with engines in the power ranges greater than or equal to 56 kW and less than 130 kW, and greater than or equal to 300 kW, in order to address the impact of the COVID-19 crisis**

## Other lobby items of interest

CETTAAR, CEMA, CECE and CLIMMAR are also meeting outside EU and ISO norms, trying to find some ways, to solve the increasing problems with theft of various equipment such as monitors, antennas, complete GPS systems and sensors, but also Diesel Particle filters are becoming a subject for thieves.



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

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

