



WELCOME TO CLIMMAR!

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





CLIMMAR Press Conference at the AGRITECHNICA 2019

**Introduction to the highlights of CLIMMAR-
activities in 2019**



The highlights:

- **Changes in the Board of CLIMMAR**
- **The Branchreports & CLIMMAR Index**
- **The EU results DSI 2019**
- **Joint Statement on the future CAP**
- **Theme: education, recruitment & retaining**
- **CLIMMAR report of activities 2018-2019**



Changes in the CLIMMAR Board

Welcome to:
Vice-President Roberto Rinaldin

Goodbye to:
Vice President Joost Merckx





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

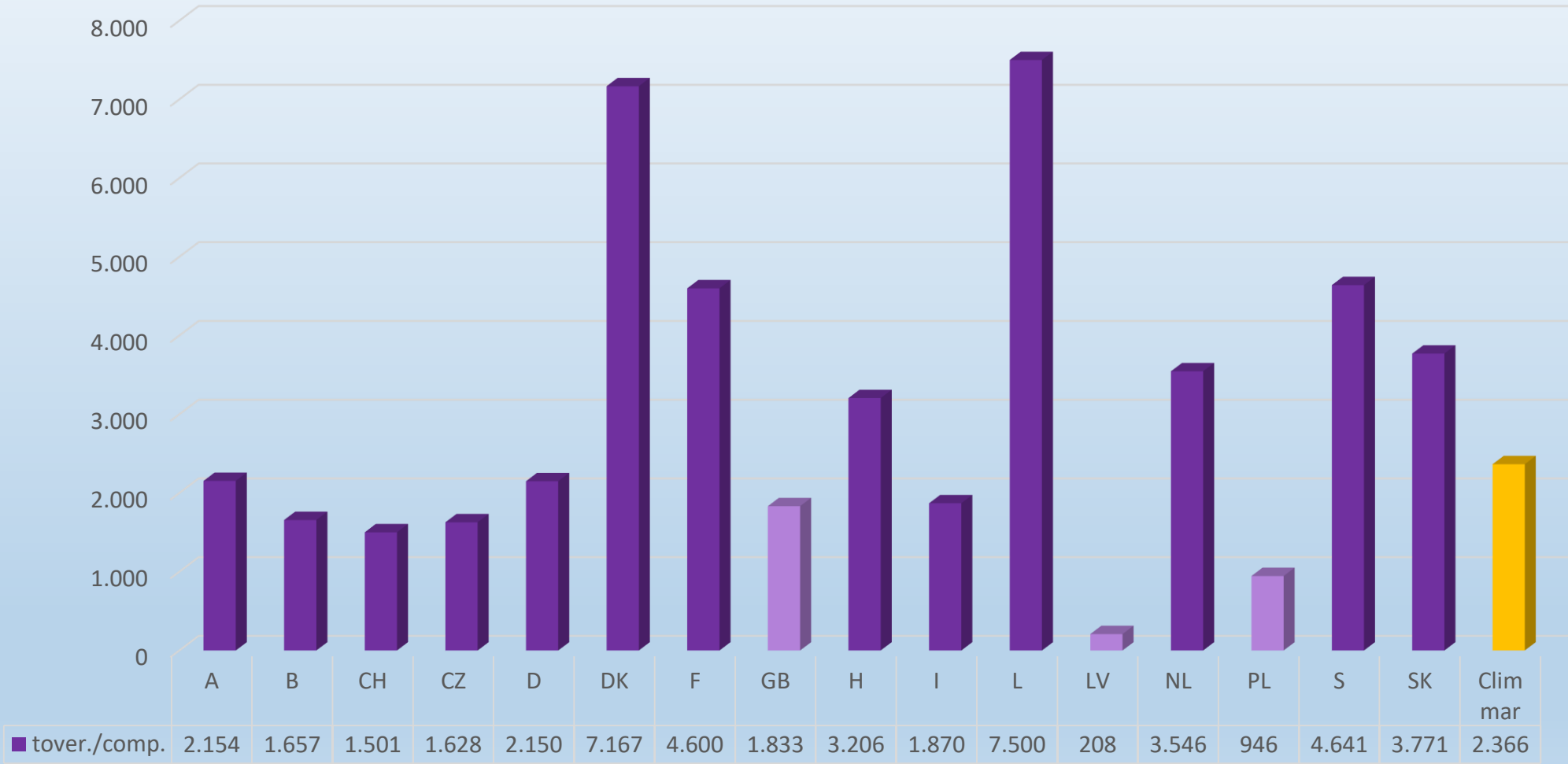
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The Branchreports & CLIMMAR Index

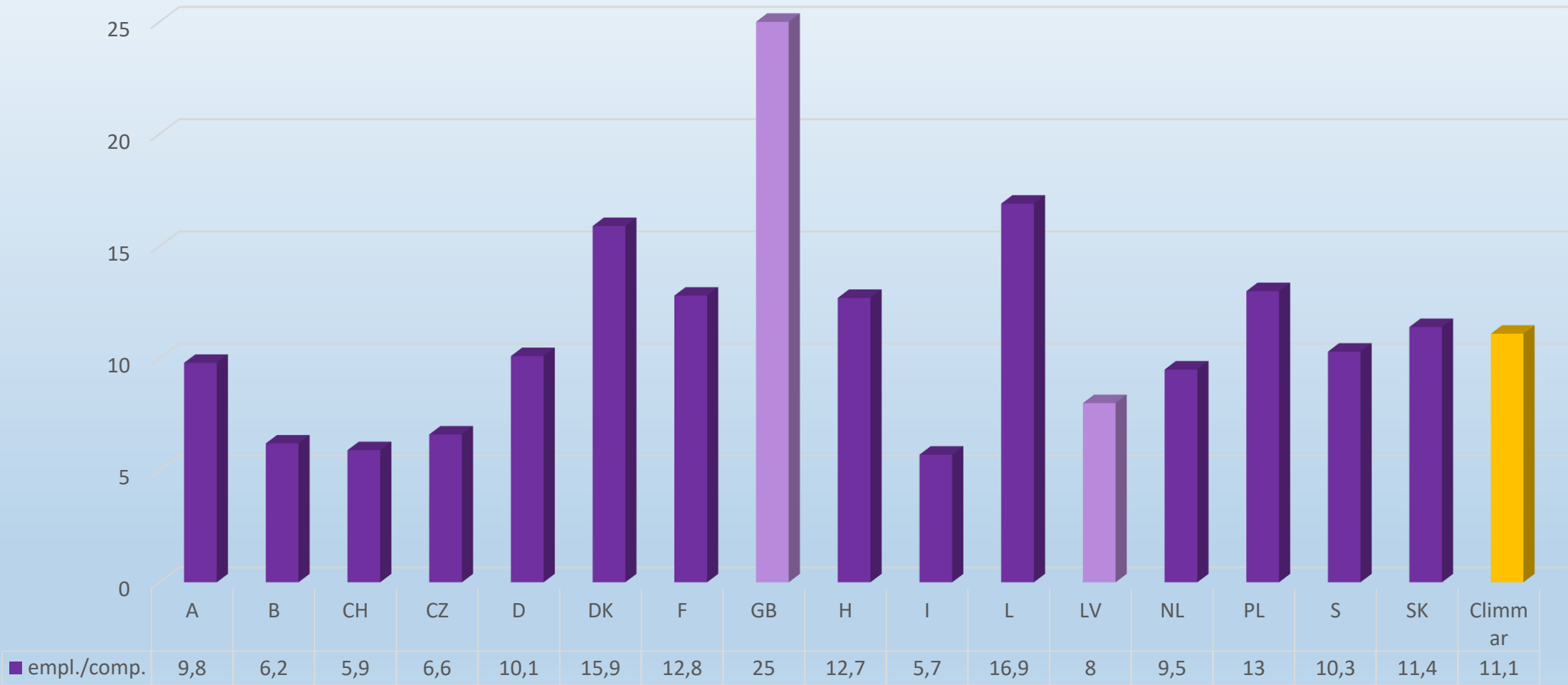


Relations - Turnover per Company: **2,366** million €/comp.



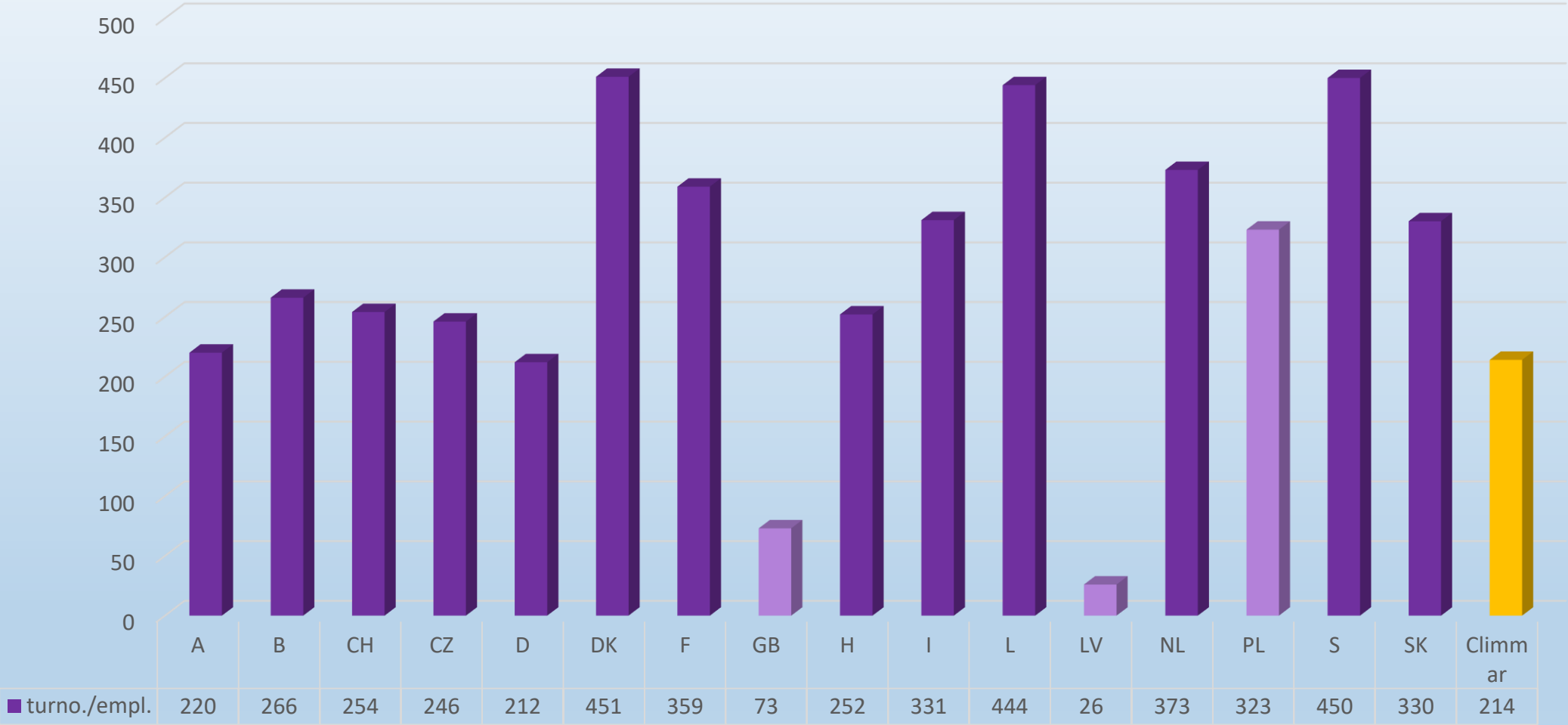


Relations - Employees per Company: **11.1**



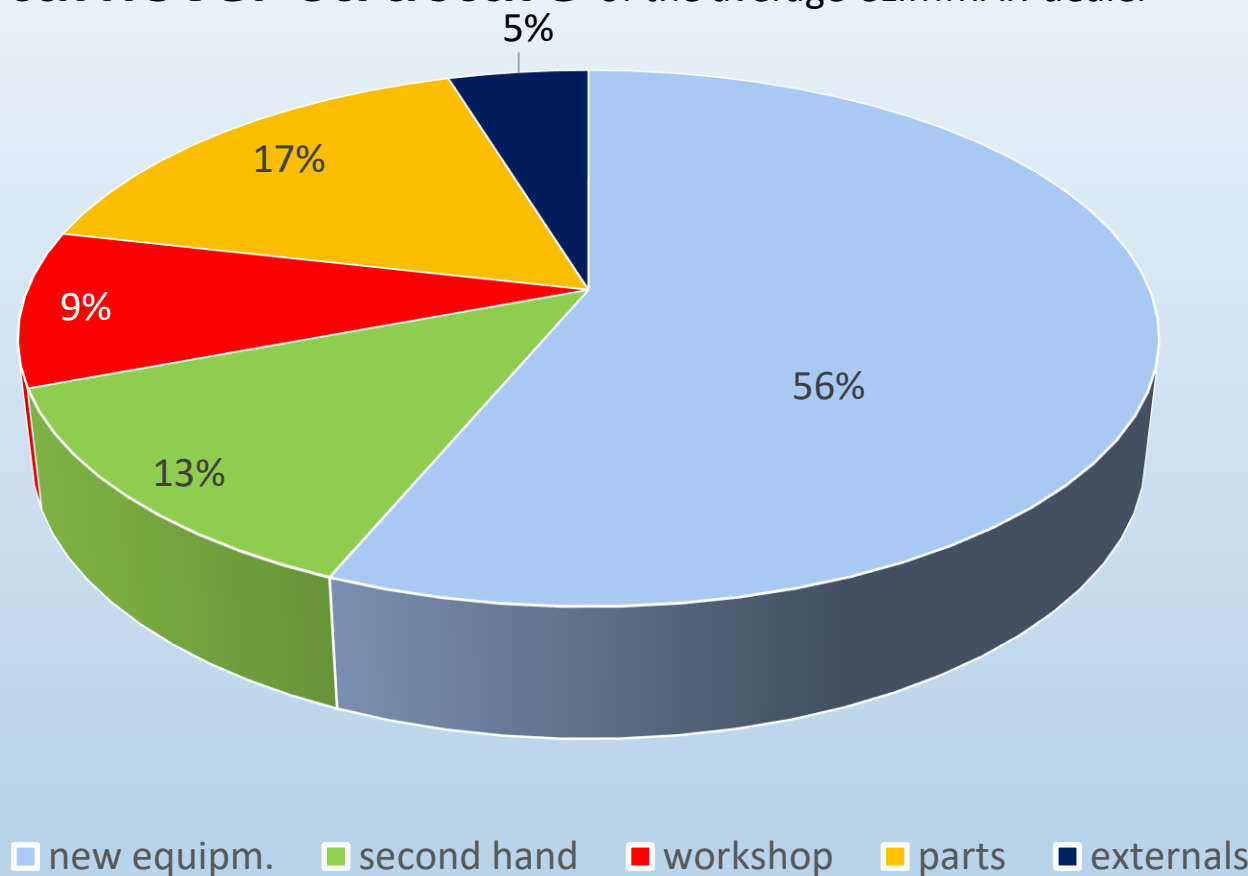


Relations - Turnover per Employee: **214.000** €/pers.

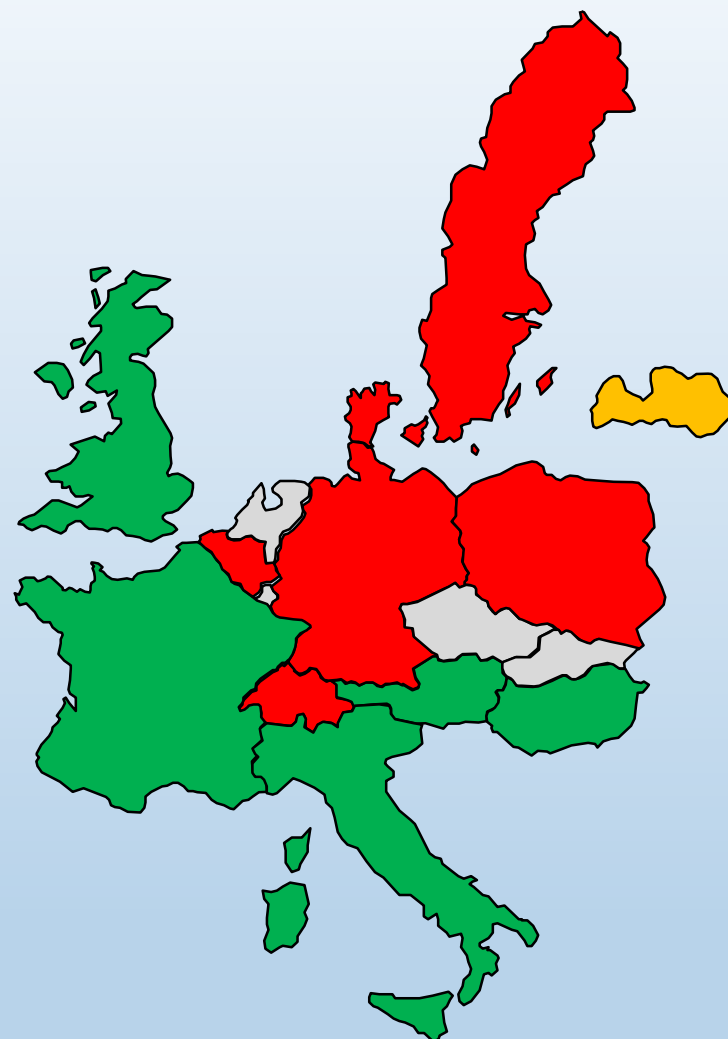




turnover-structure of the average CLIMMAR-dealer



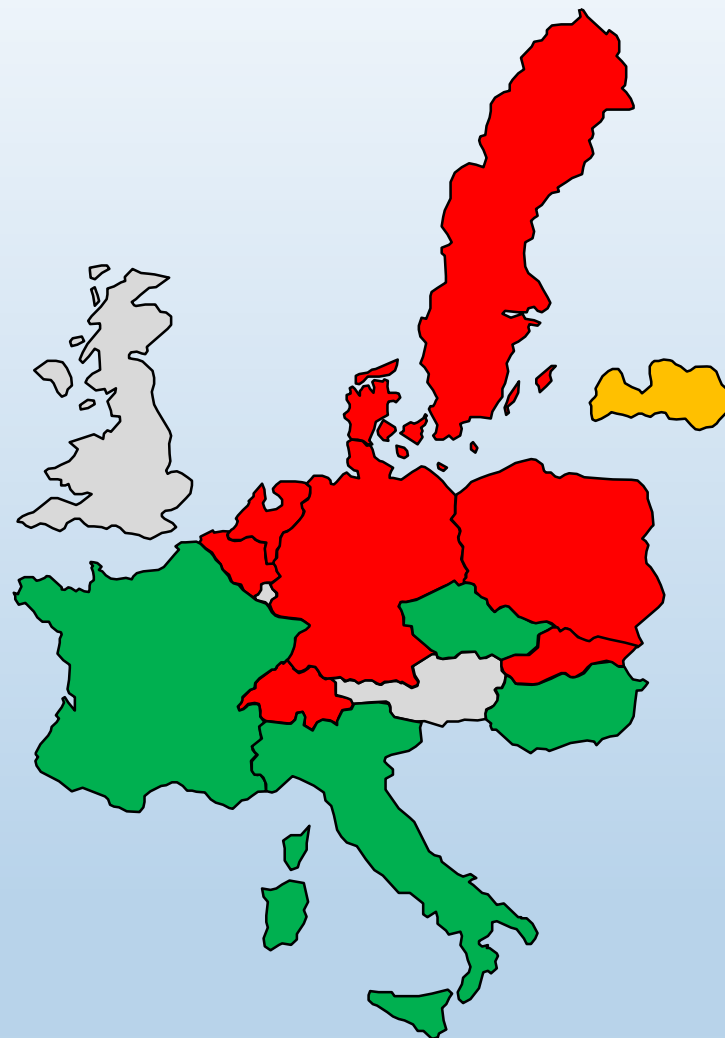
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Turnover total

development of turnover in
the first half of 2019
compared with the same
period 2018:

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



Turnover new equipment

development of turnover in the first half of 2019 compared with the same period 2018:

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



Turnover workshop

development of turnover in
the first half of 2019
compared with the same
period 2018:

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



Turnover spareparts

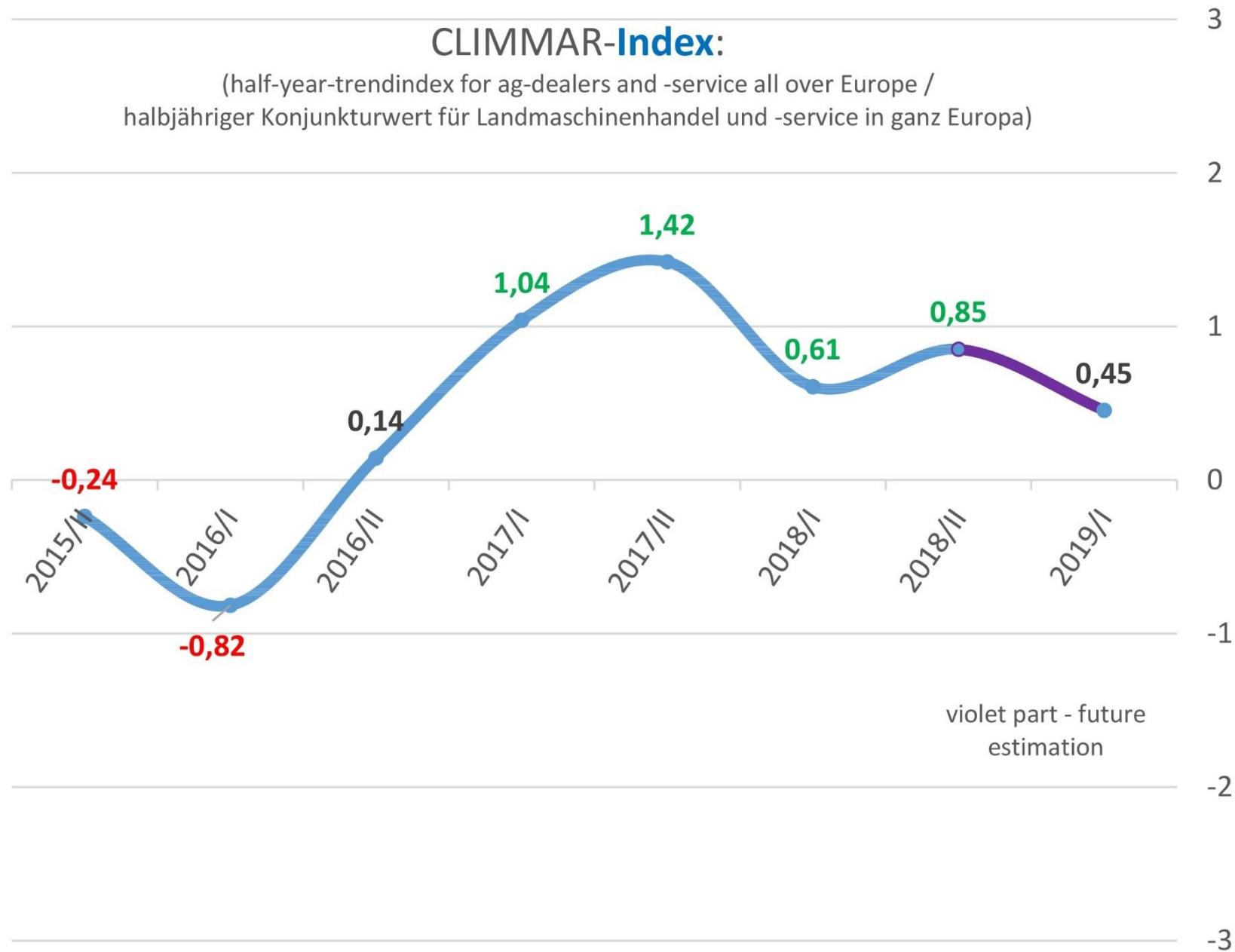
development of turnover in
the first half of 2019
compared with the same
period 2018:

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



CLIMMAR-Index:

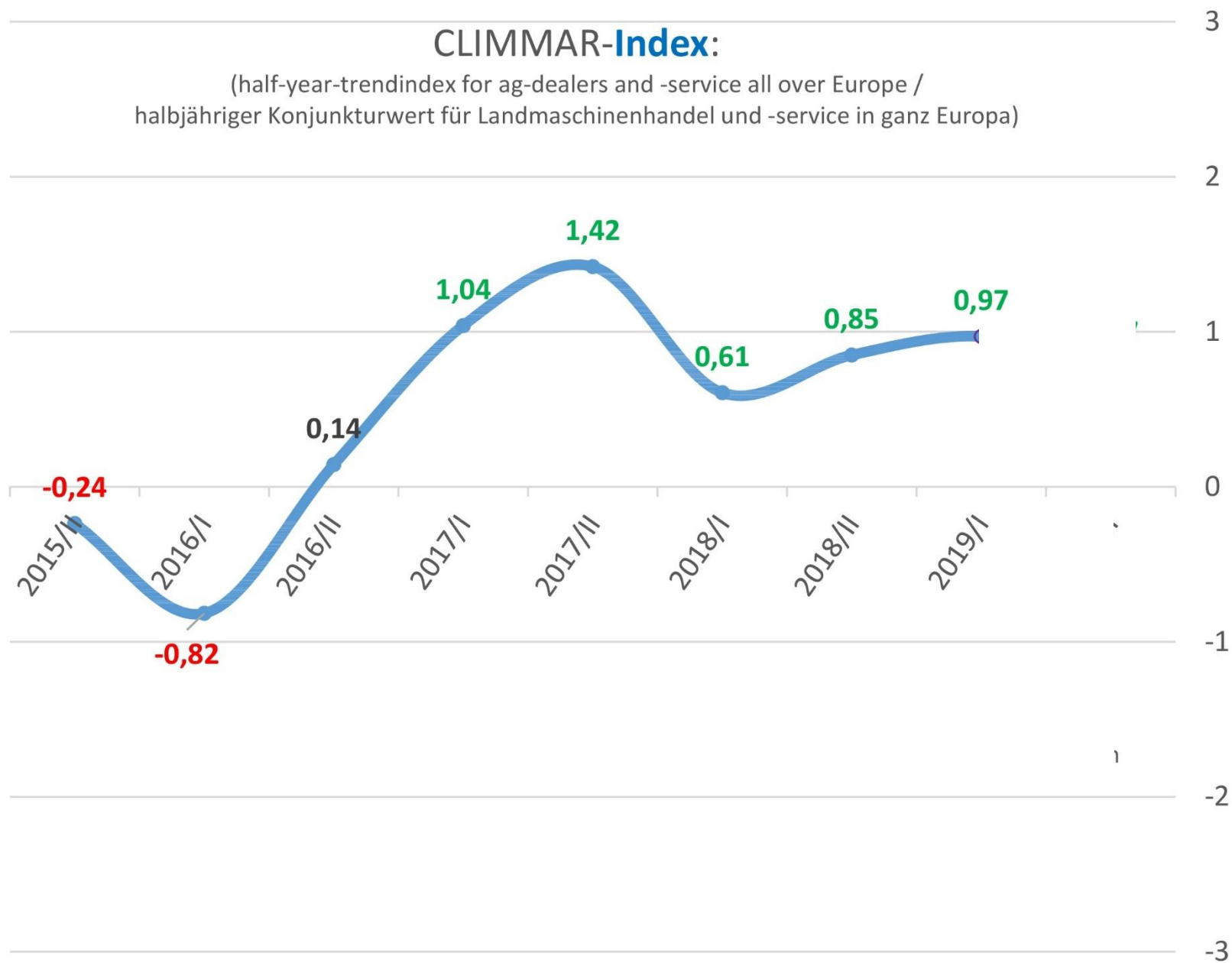
(half-year-trendindex for ag-dealers and -service all over Europe /
halbjähriger Konjunkturwert für Landmaschinenhandel und -service in ganz Europa)





CLIMMAR-Index:

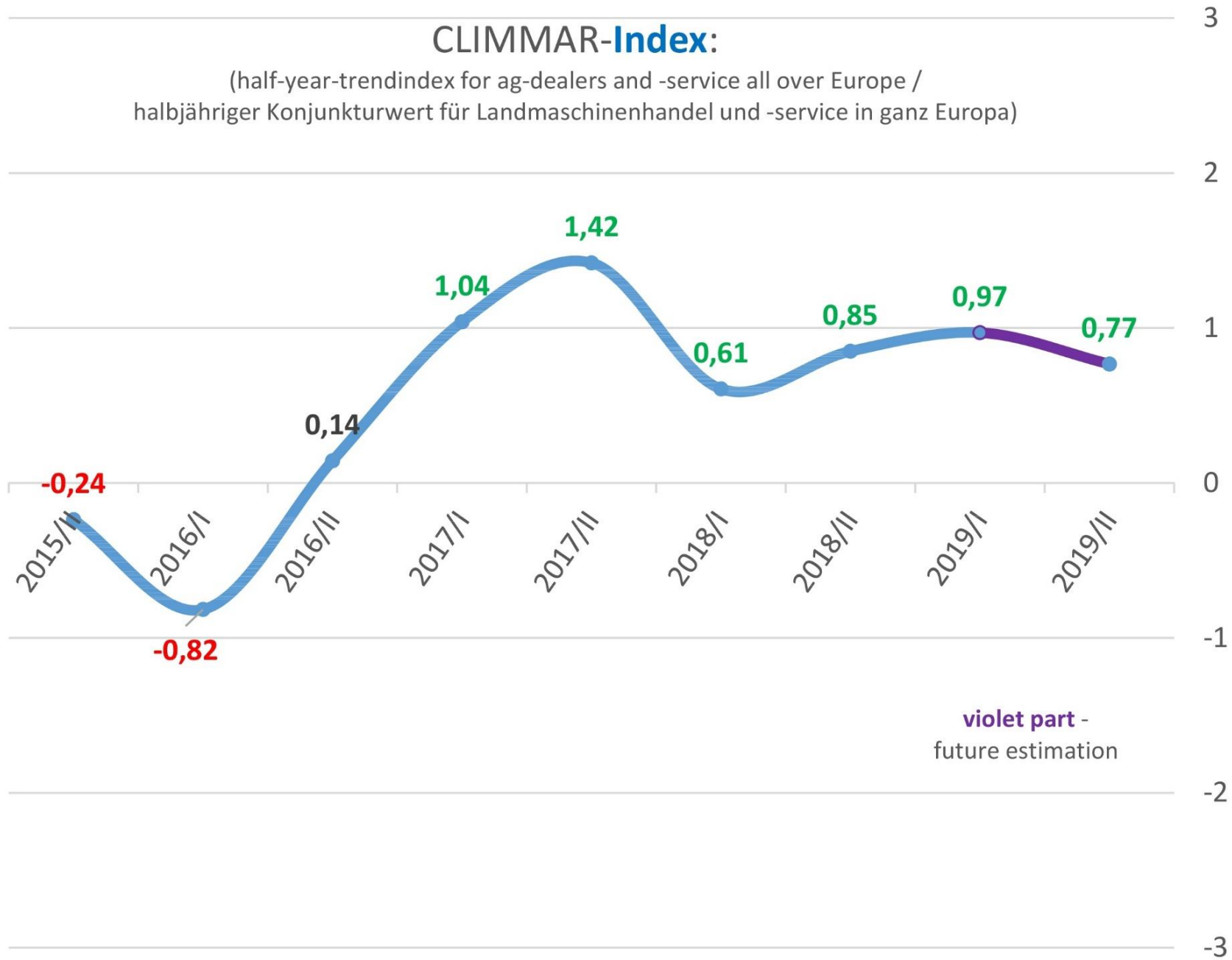
(half-year-trendindex for ag-dealers and -service all over Europe /
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CLIMMAR-Index:

(half-year-trendindex for ag-dealers and -service all over Europe /
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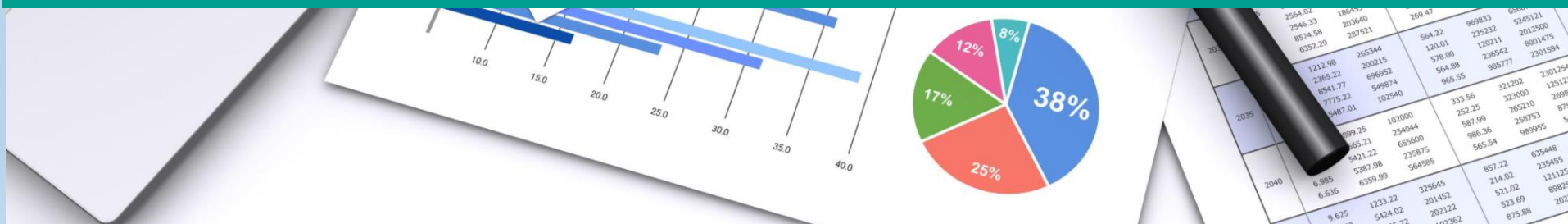
The EU results DSI 2019

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2019 DSI

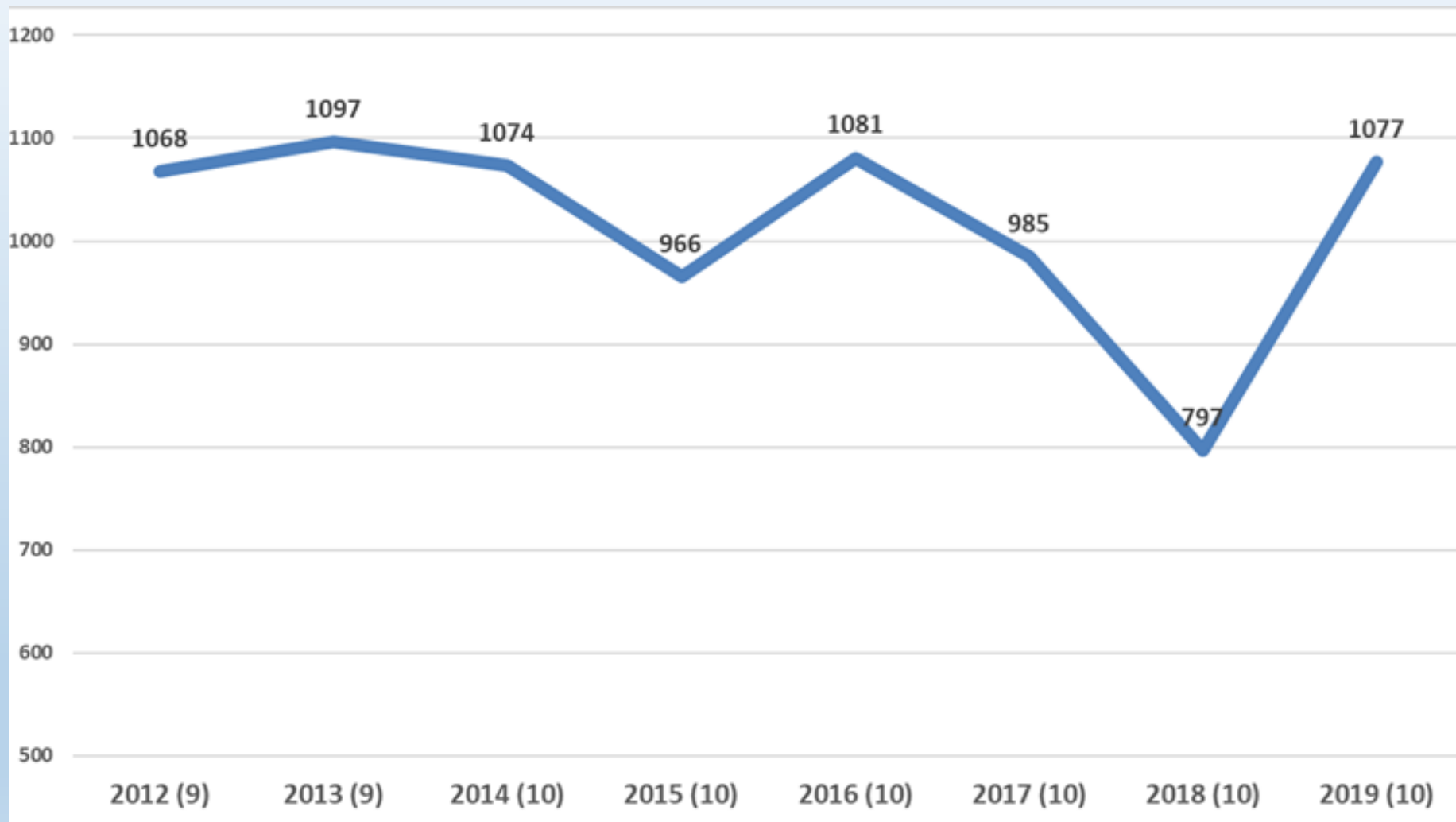
9th survey



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A good level of answers for 2019



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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

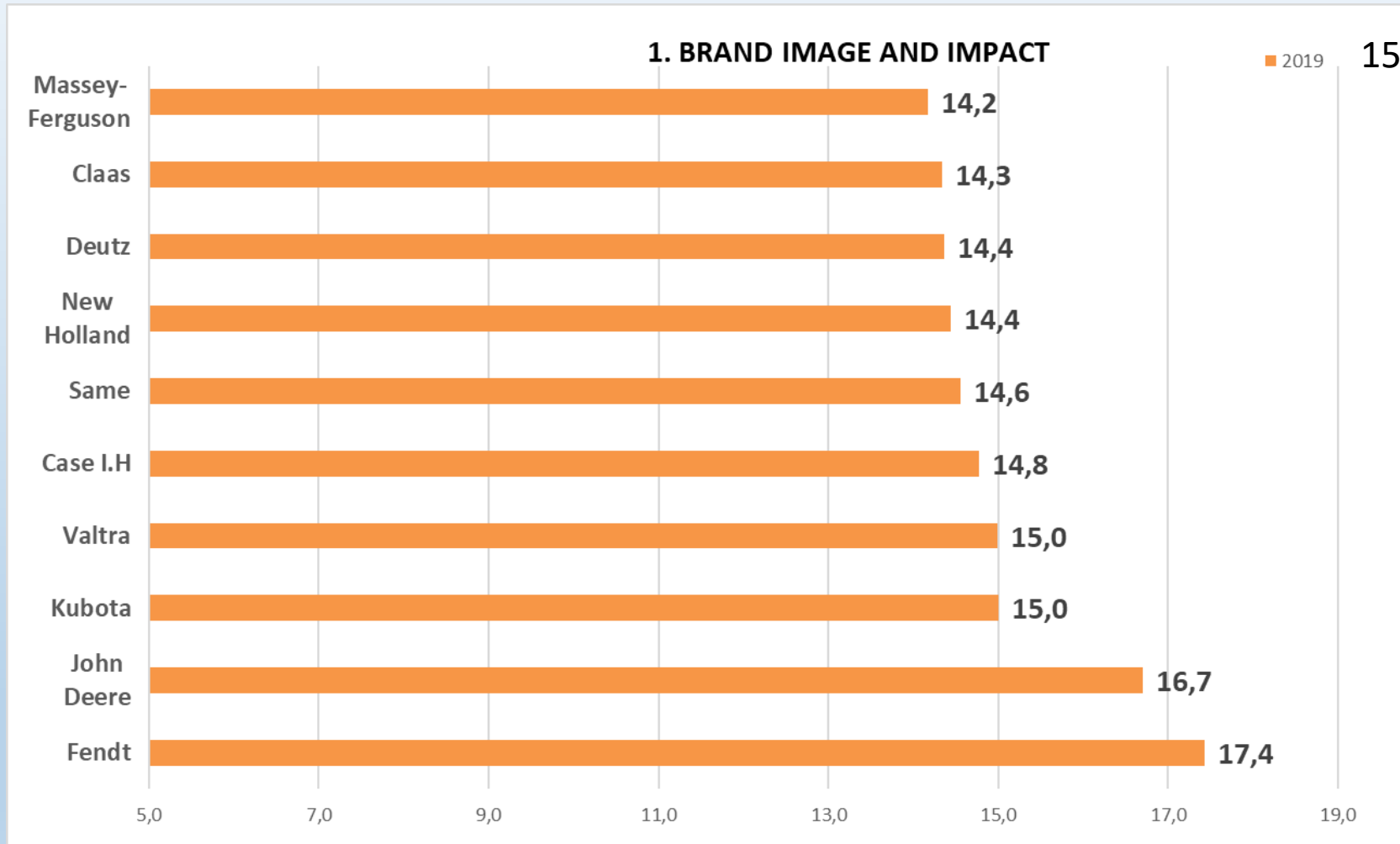
11: PROFITABILITY CONTRIBUTION

12: IMPROVEMENTS

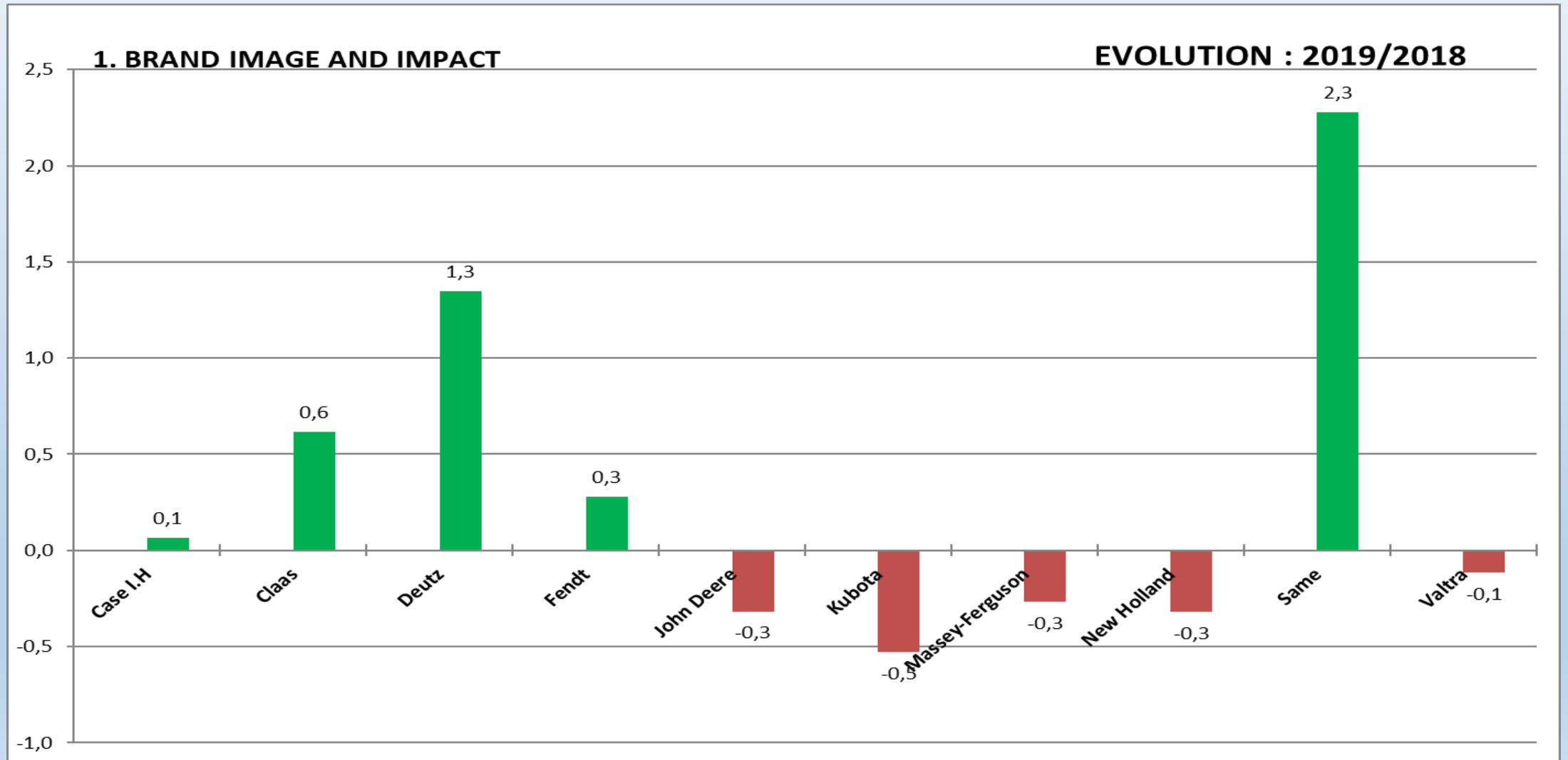
13: FINANCING

14: ANTI-THEFT

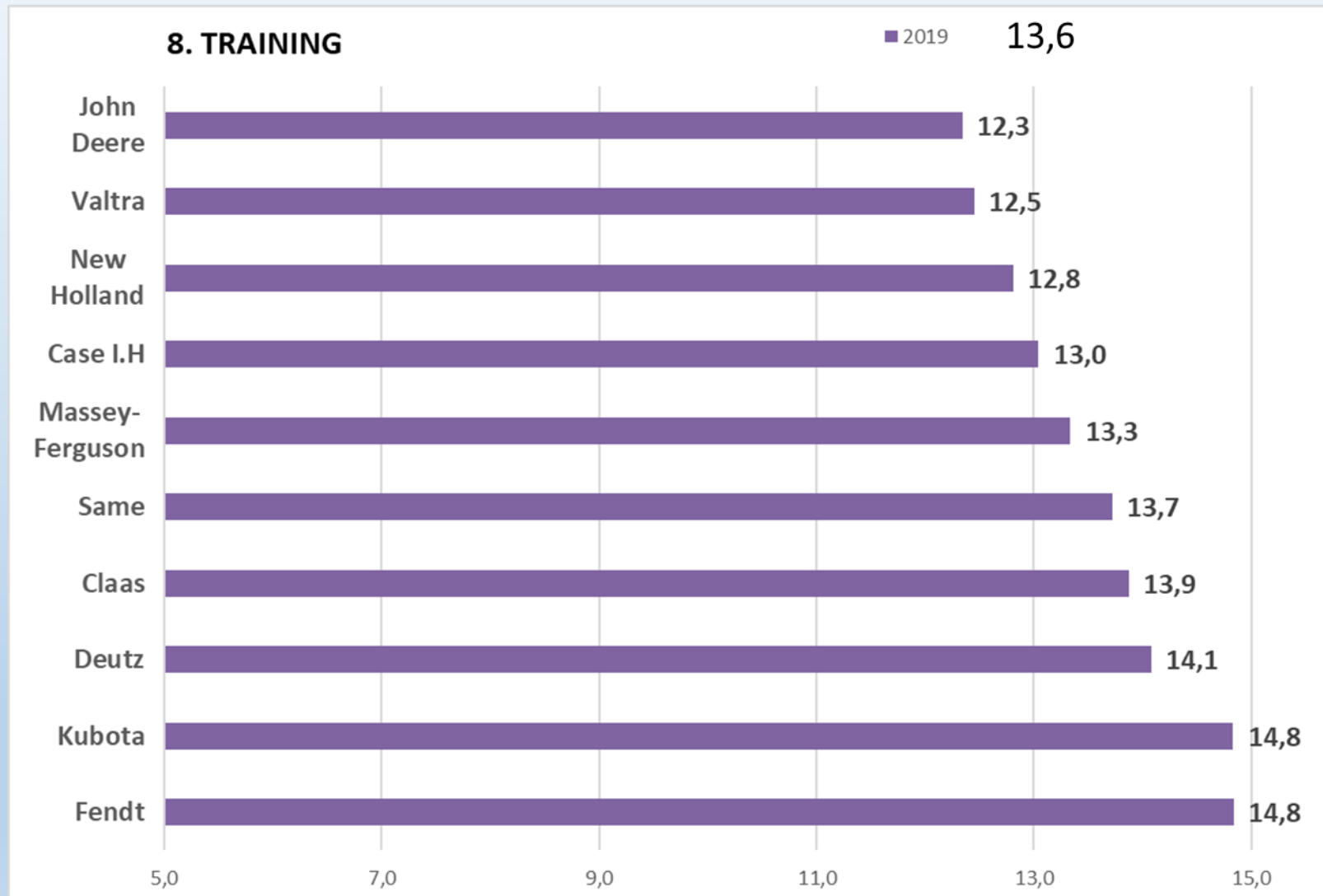
AVERAGE RESULT FOR BRAND IMAGE



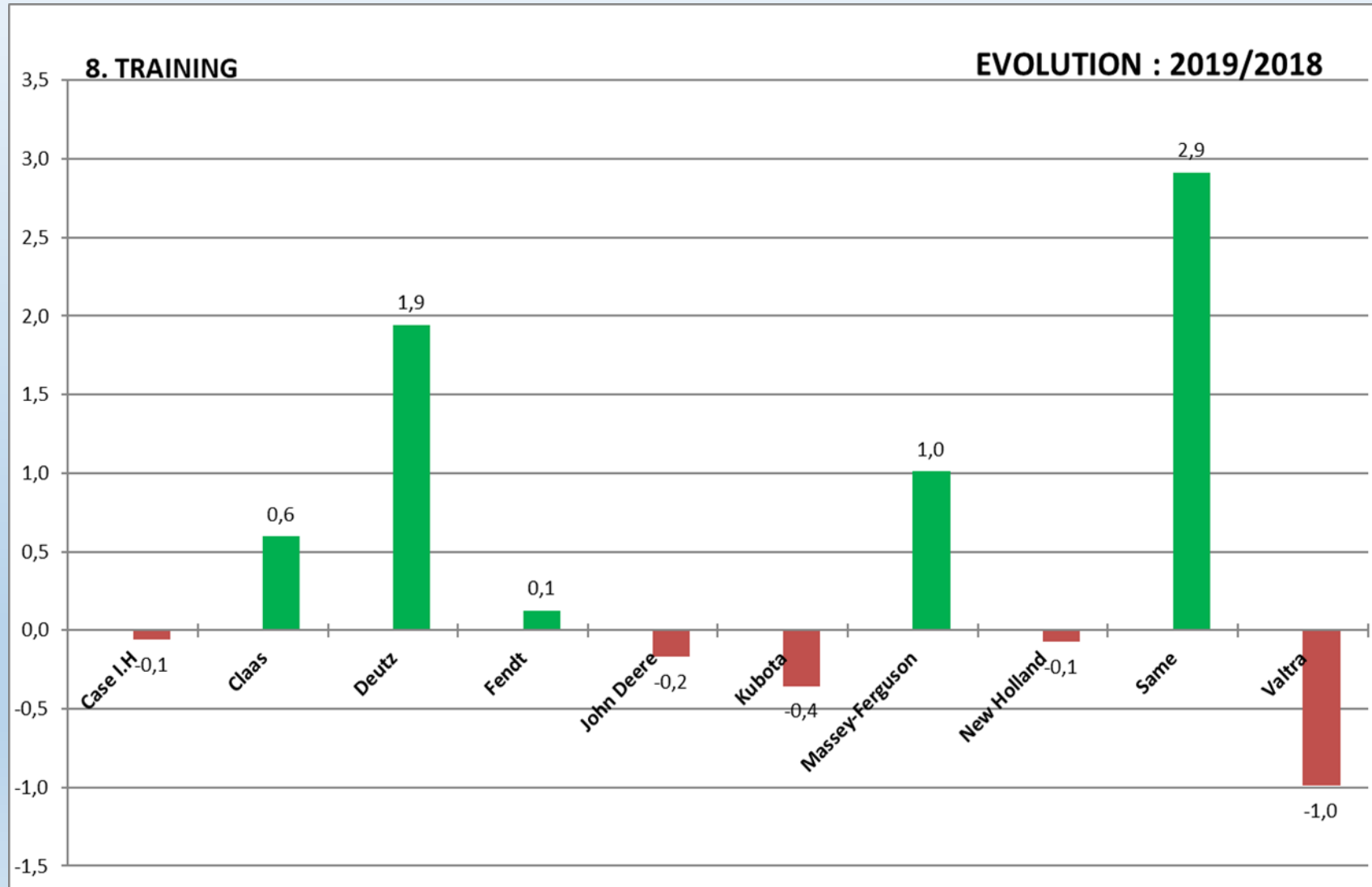
AVERAGE RESULT FOR BRAND IMAGE



AVERAGE RESULT FOR TRAINING

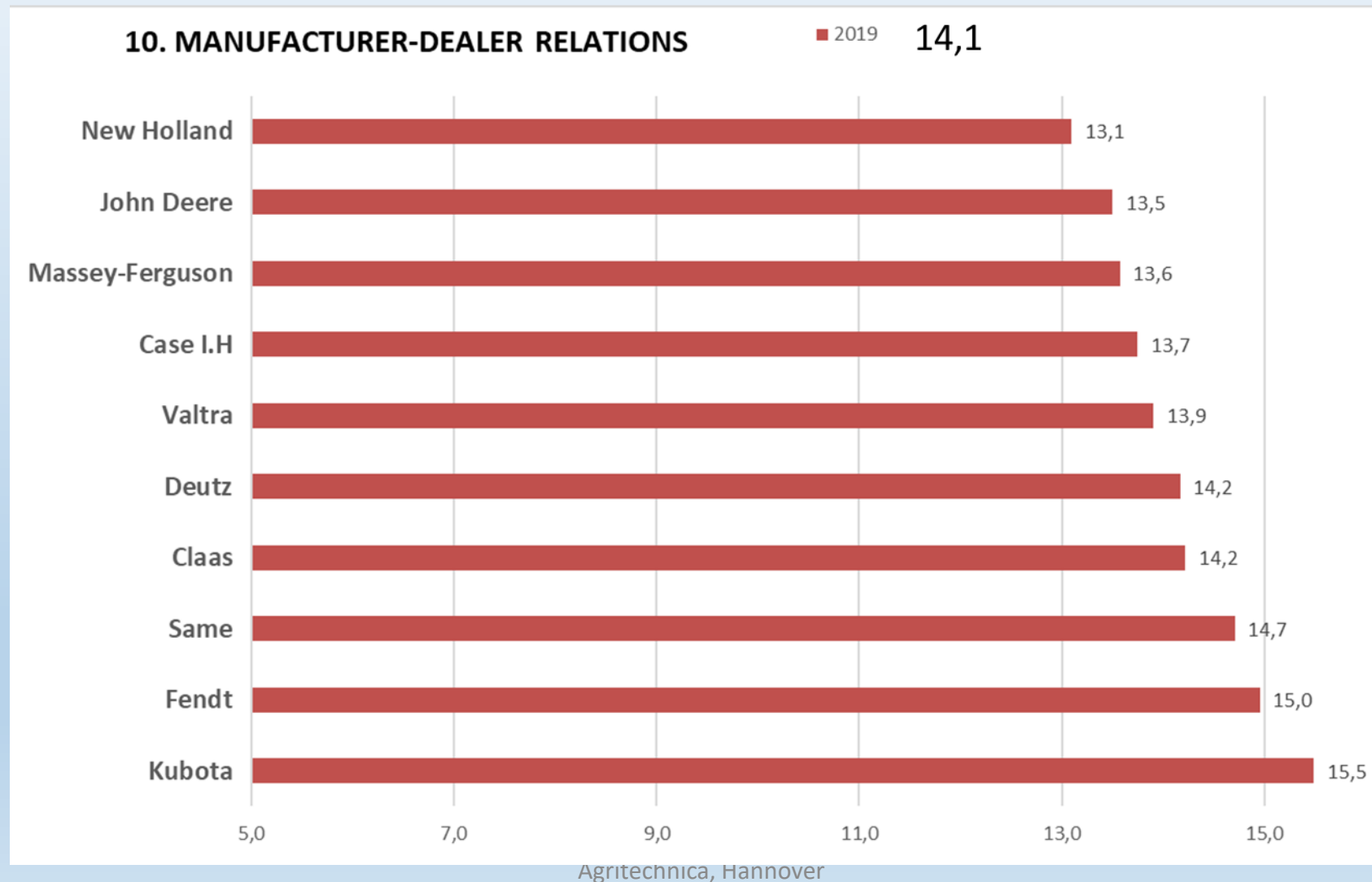


AVERAGE RESULT FOR TRAINING



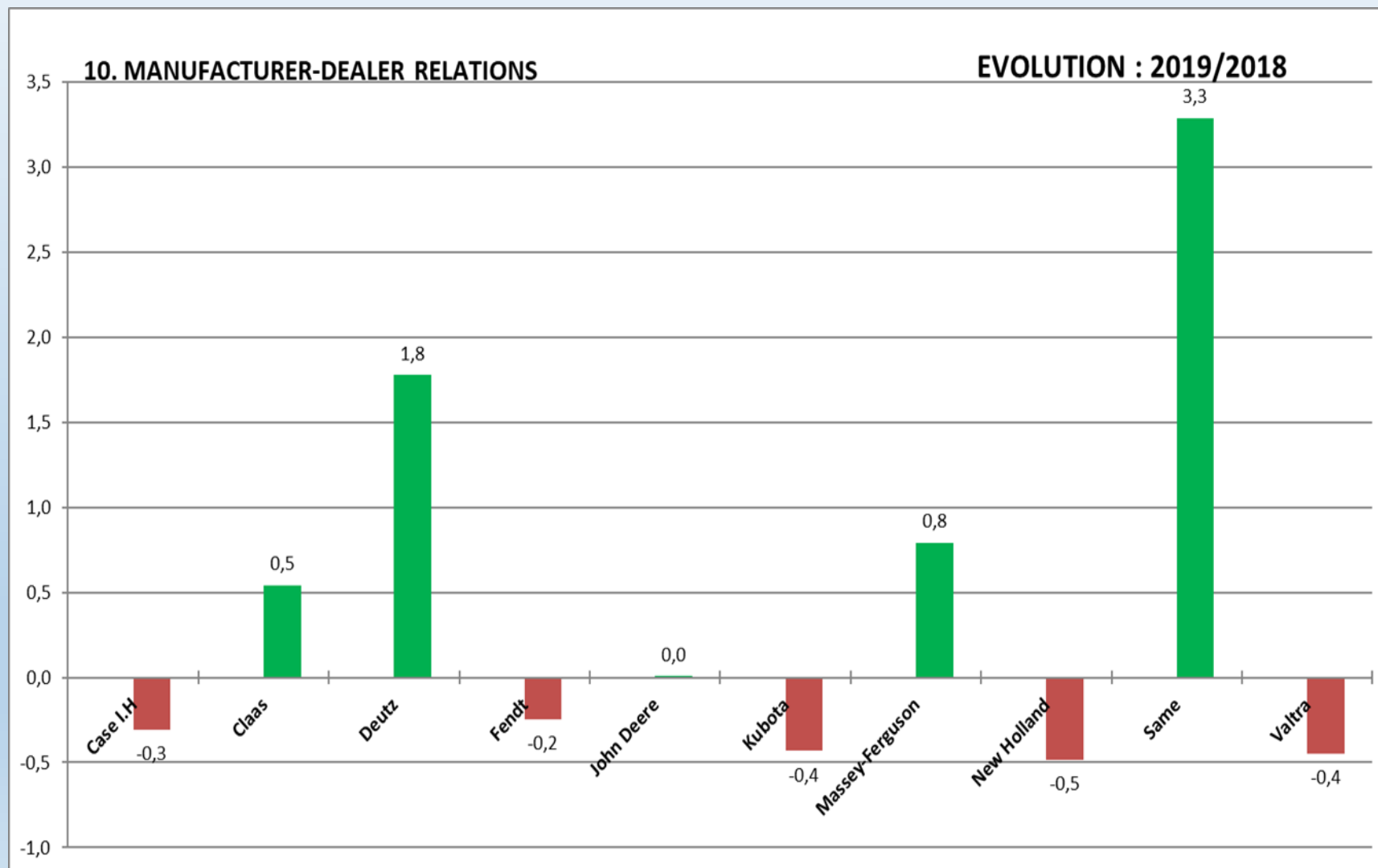


AVERAGE RESULT FOR MANUFACTURER-DEALER RELATIONS

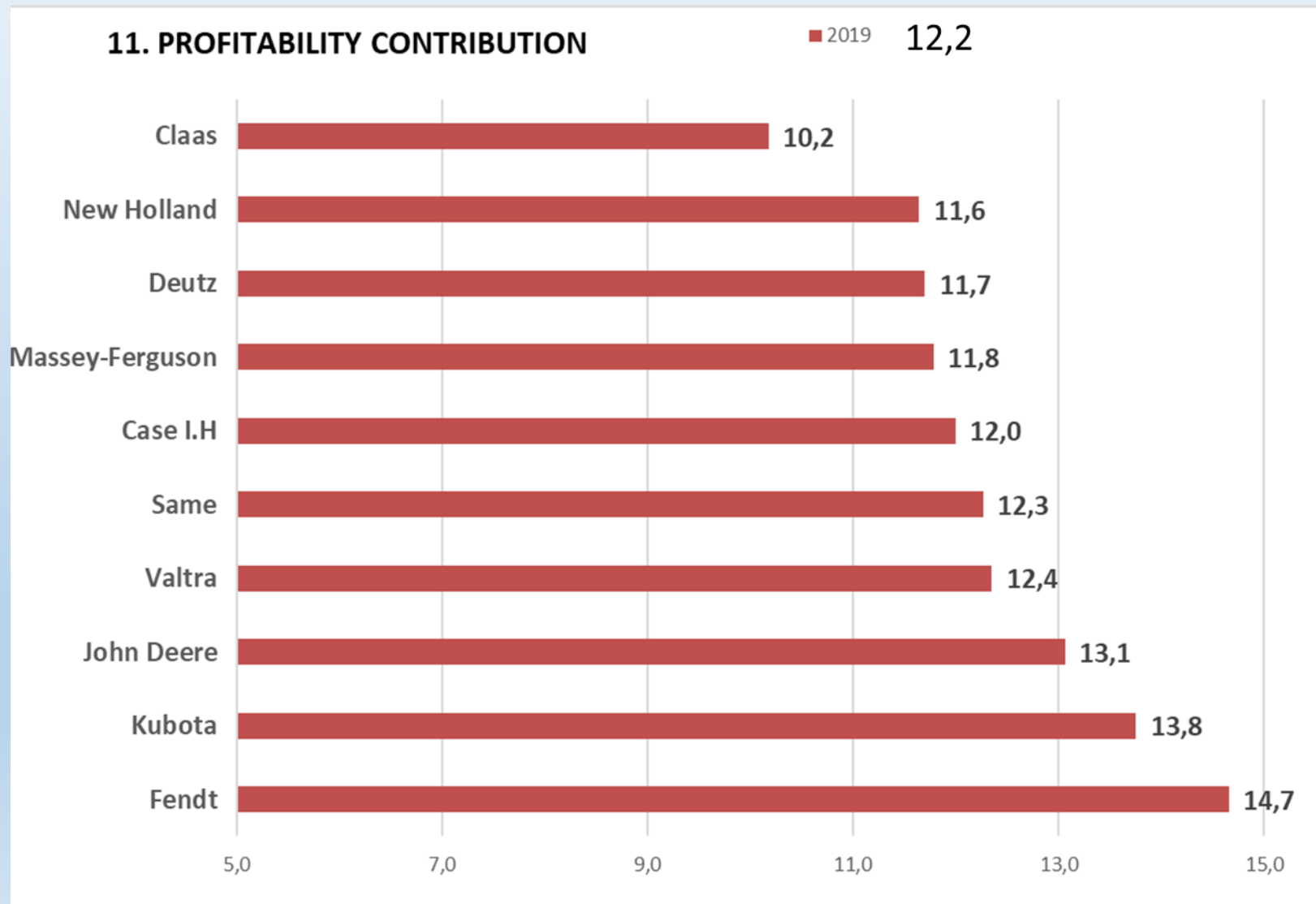




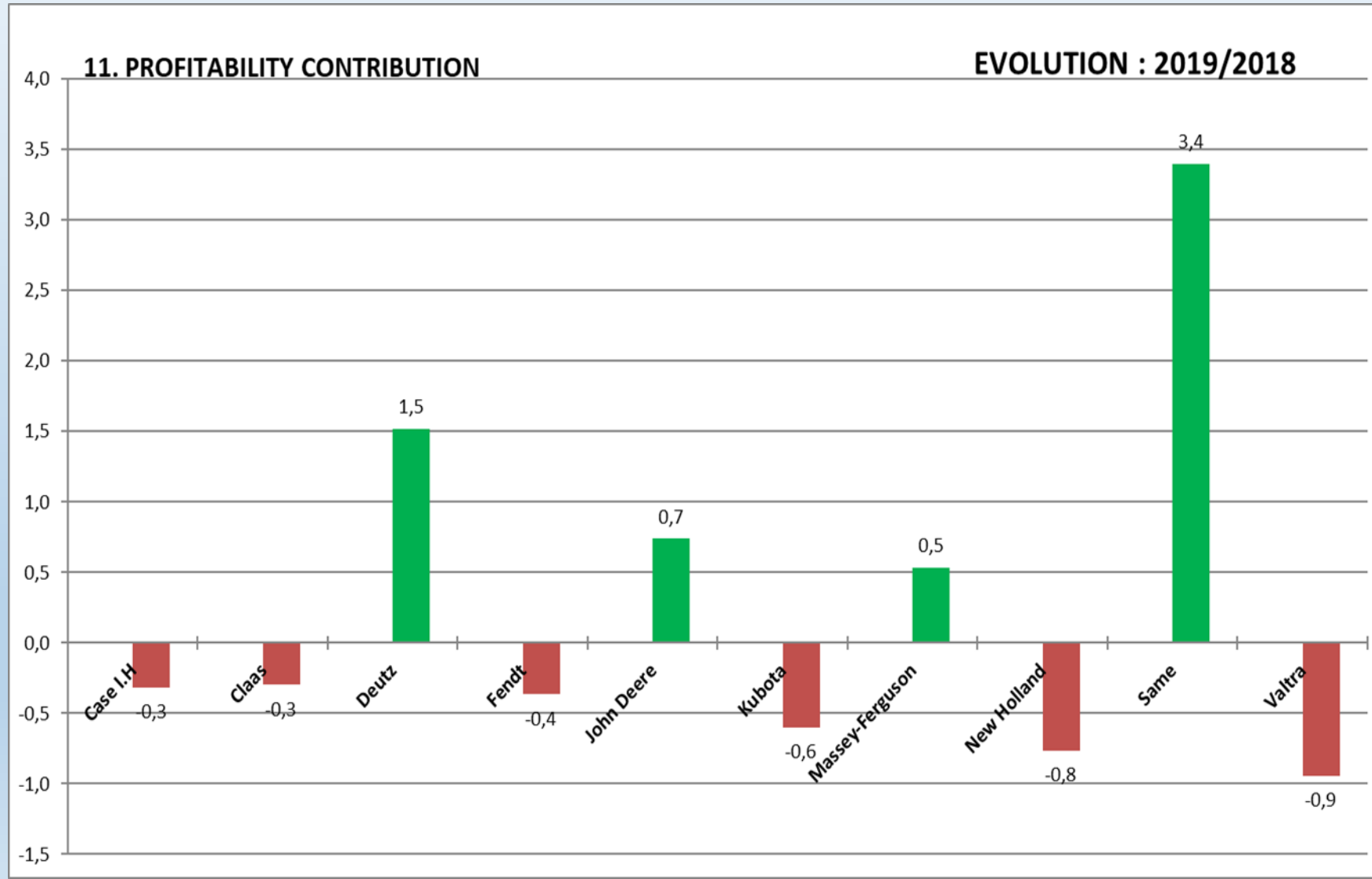
AVERAGE RESULT FOR MANUFACTURER-DEALER RELATIONS



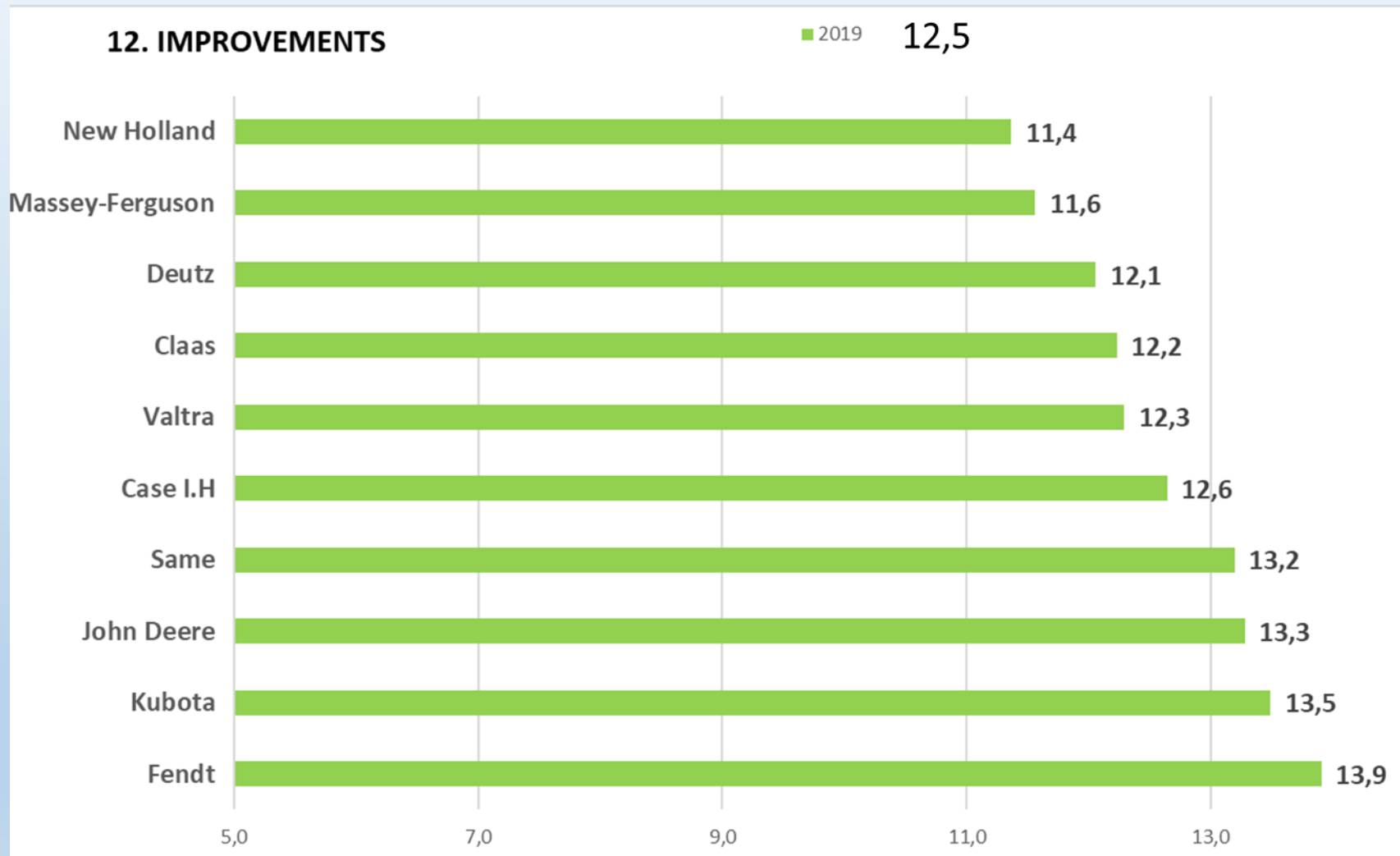
AVERAGE RESULT FOR PROFITABILITY CONTRIBUTION



AVERAGE RESULT FOR PROFITABILITY CONTRIBUTION

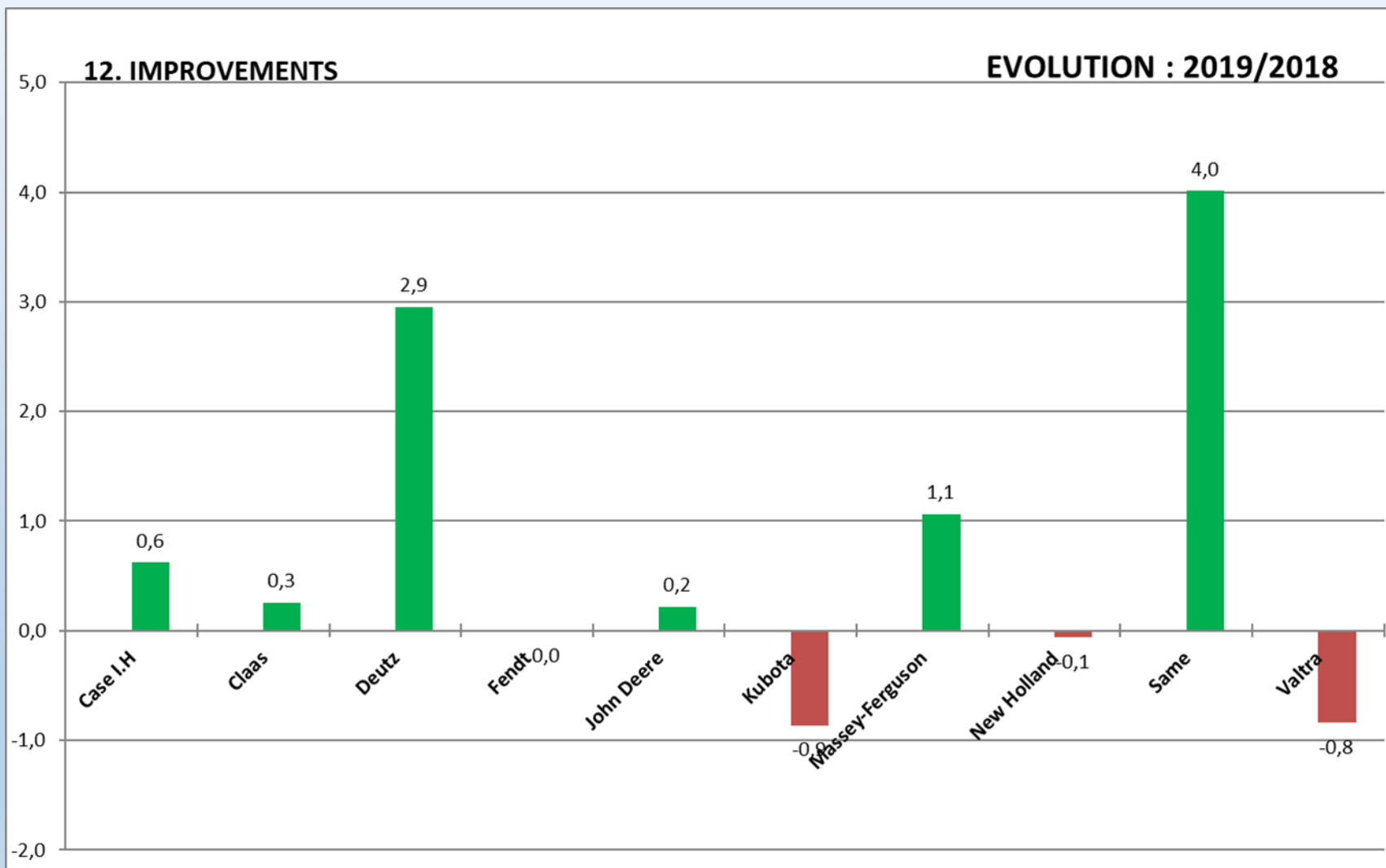


AVERAGE RESULT FOR IMPROVEMENTS

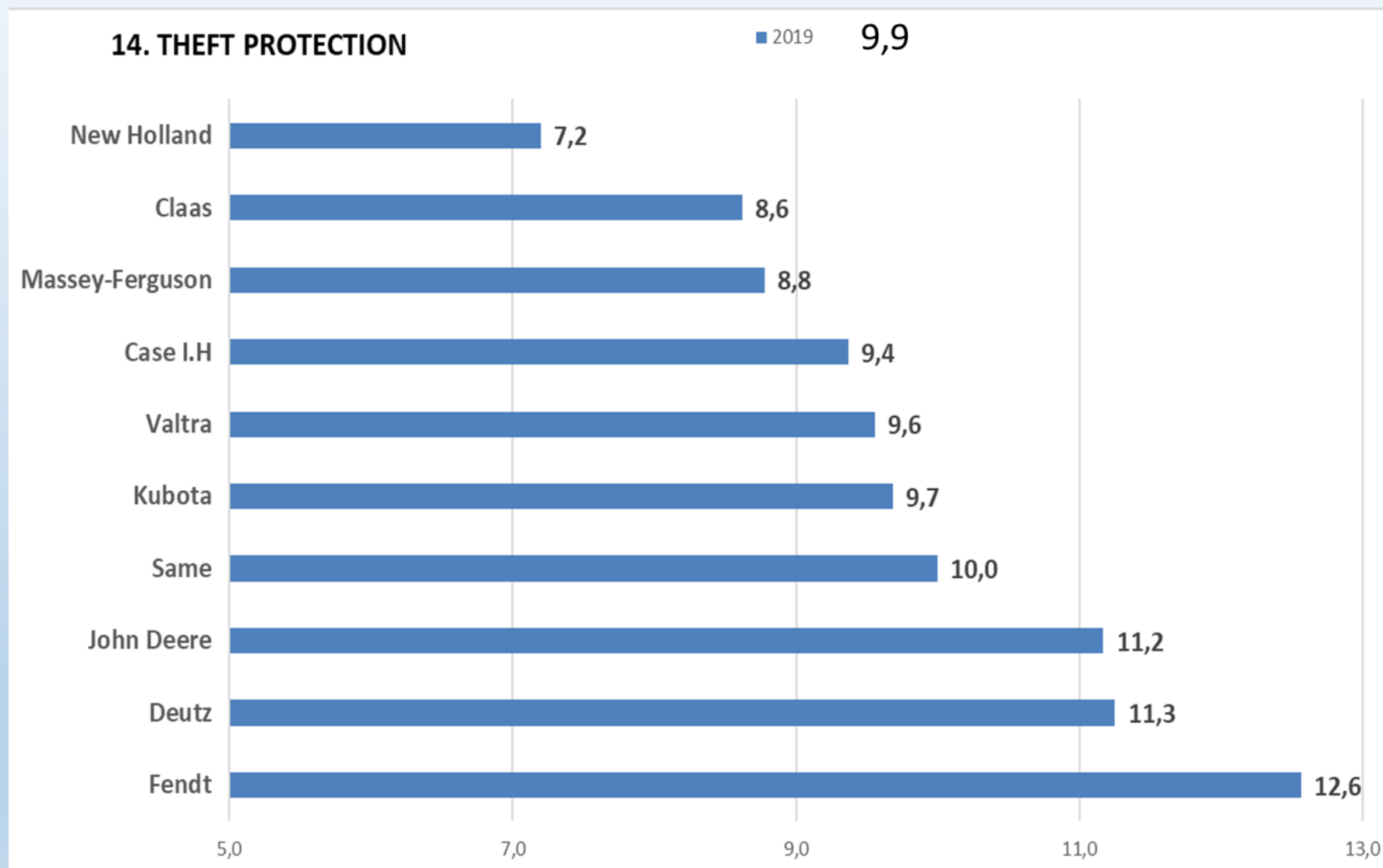


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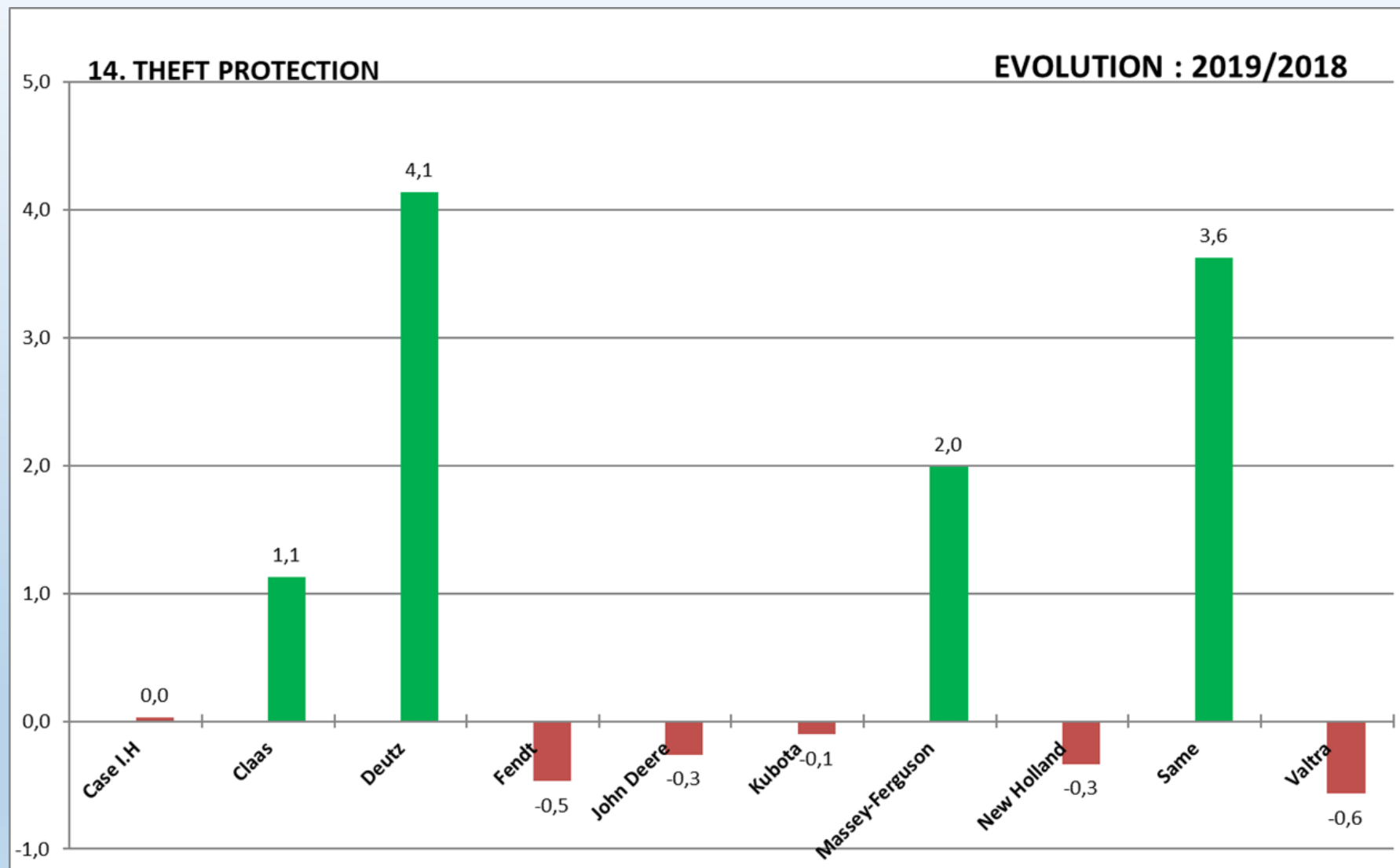
AVERAGE RESULT FOR IMPROVEMENTS



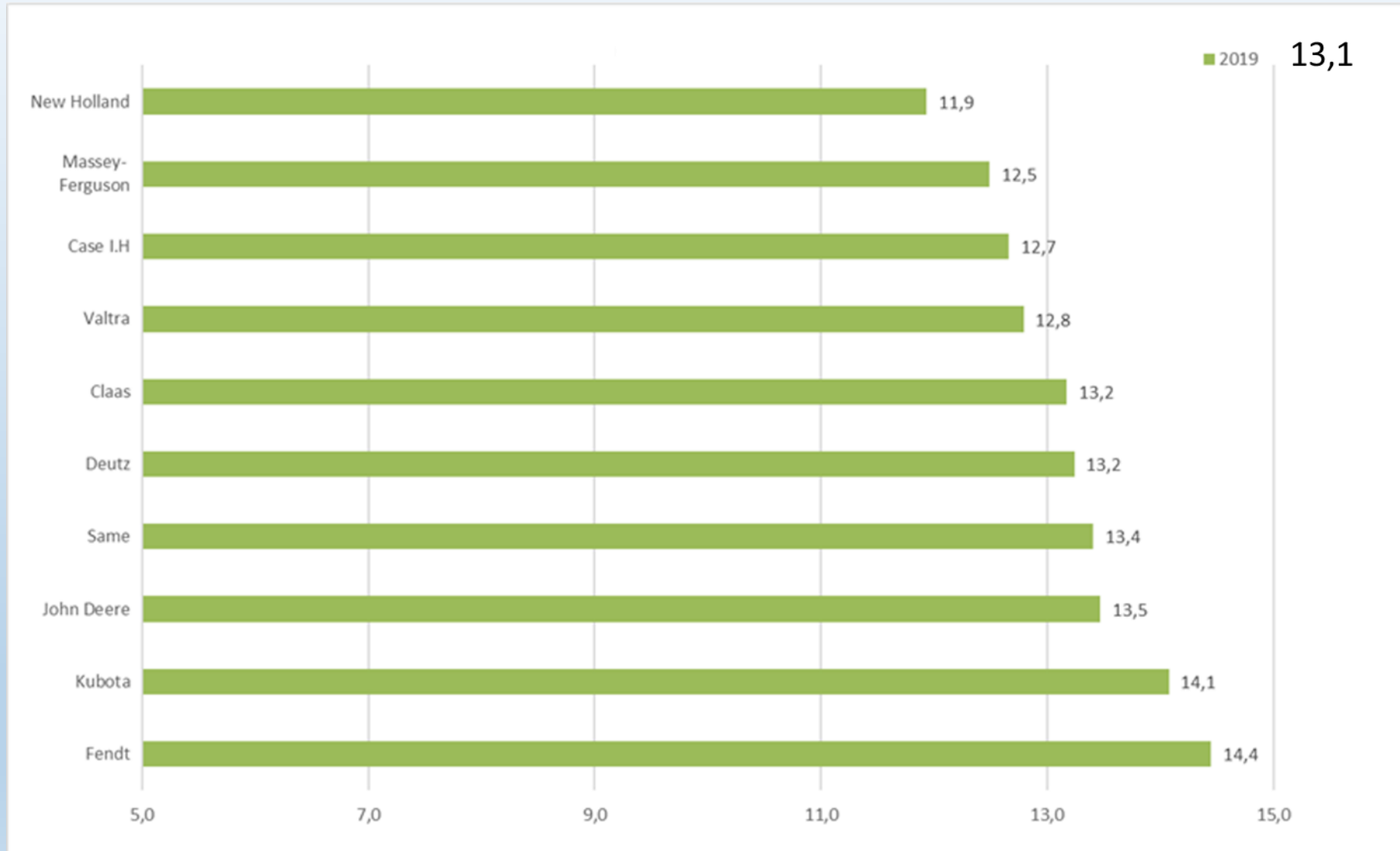
AVERAGE RESULT FOR THEFT PROTECTION



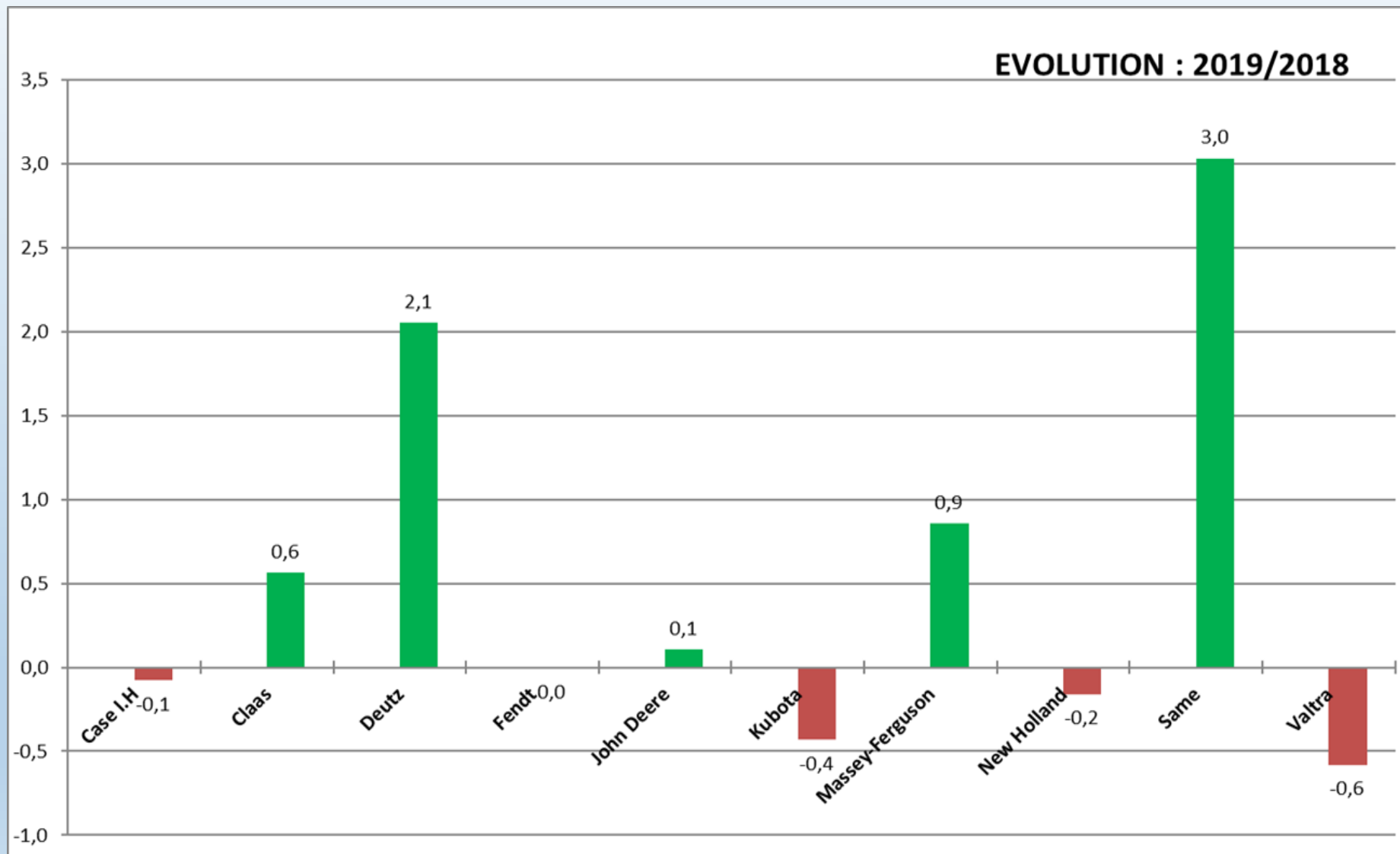
AVERAGE RESULT FOR THEFT PROTECTION



OVERALL AVERAGE RESULT FOR EACH BRAND



OVERALL AVERAGE RESULT FOR EACH BRAND



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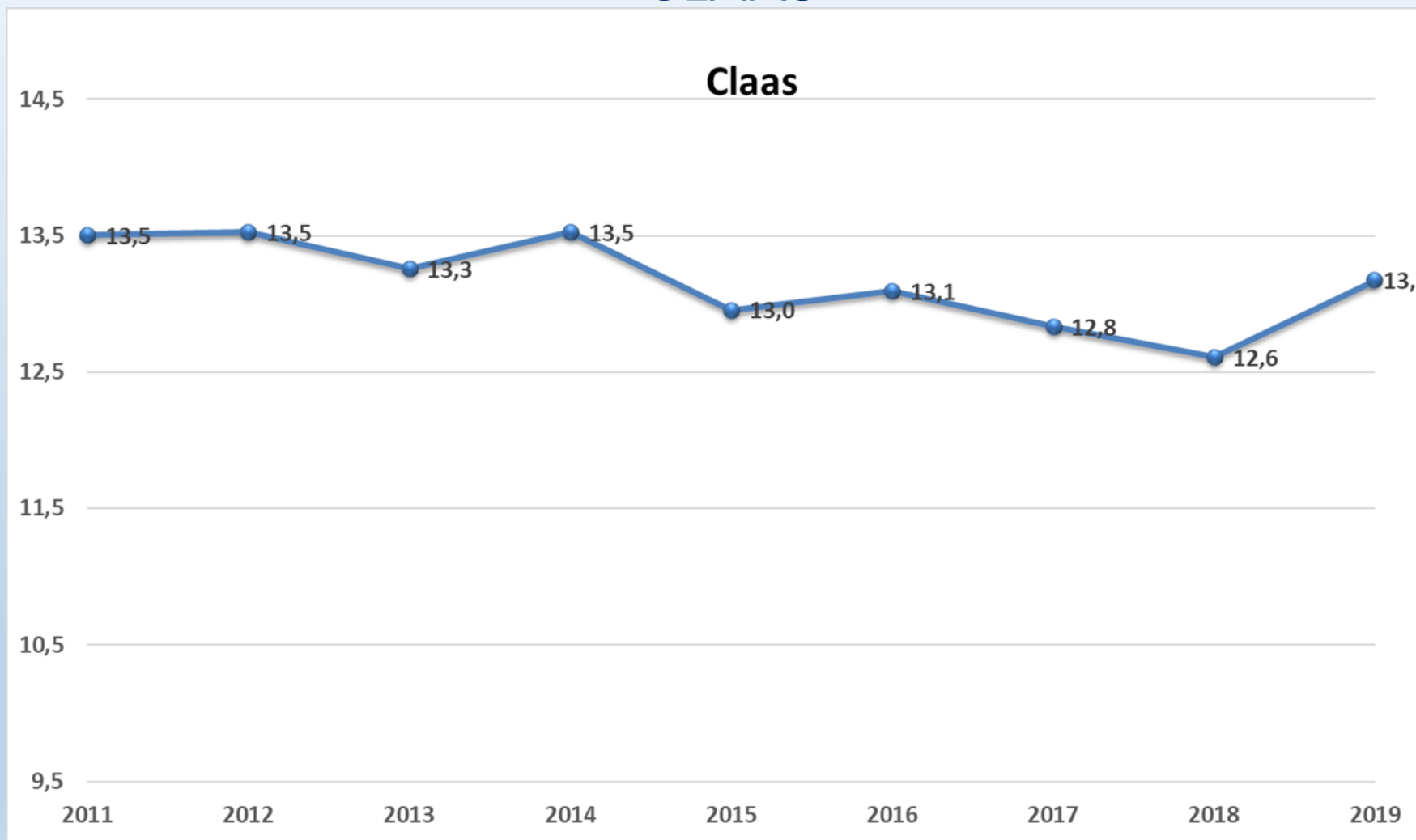


IMPROVEMENTS OF EACH BRAND SINCE 2011



Evolution of the general average 2019/2011

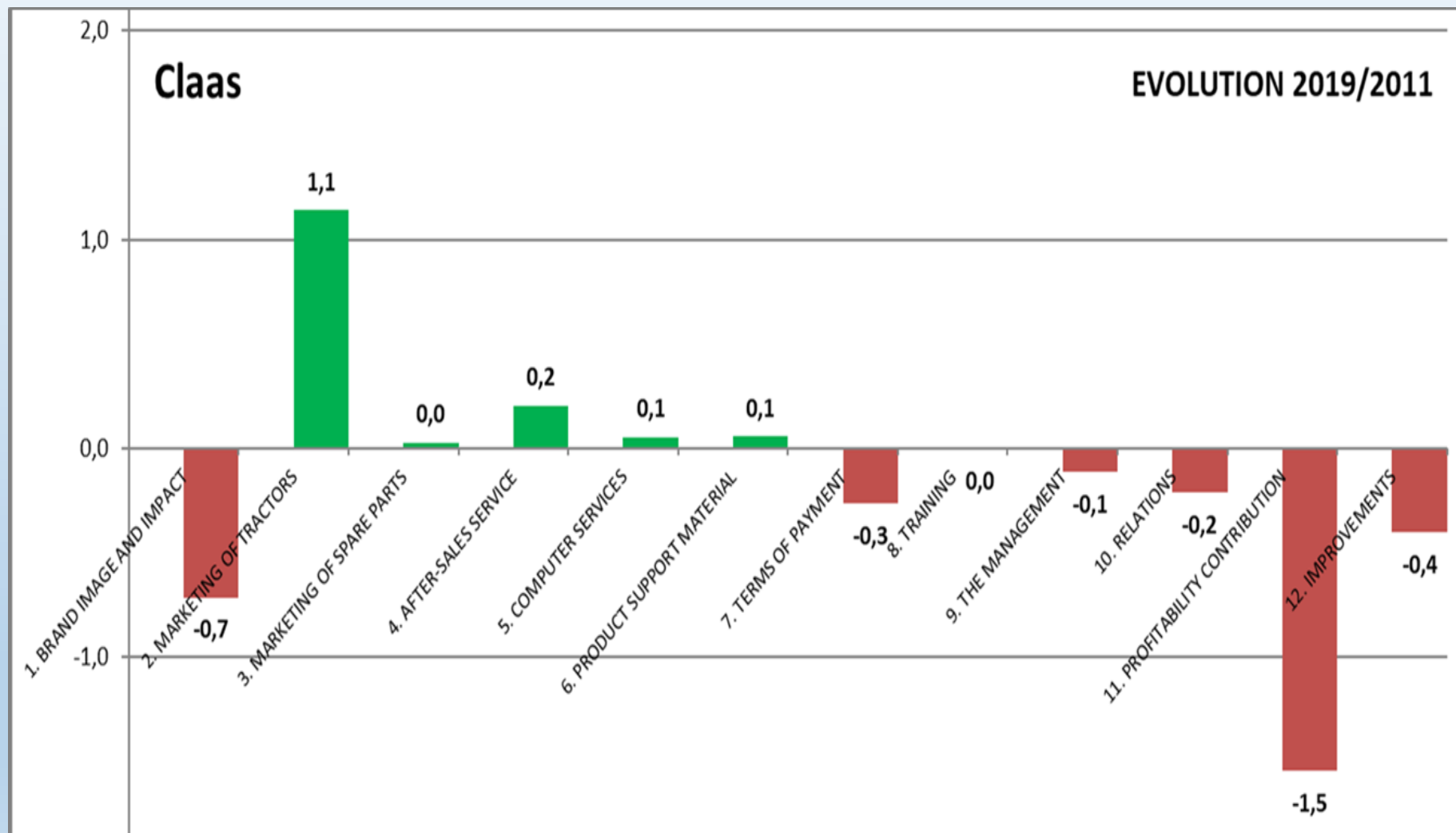
CLAAS





Evolution of the general average 2019/2011

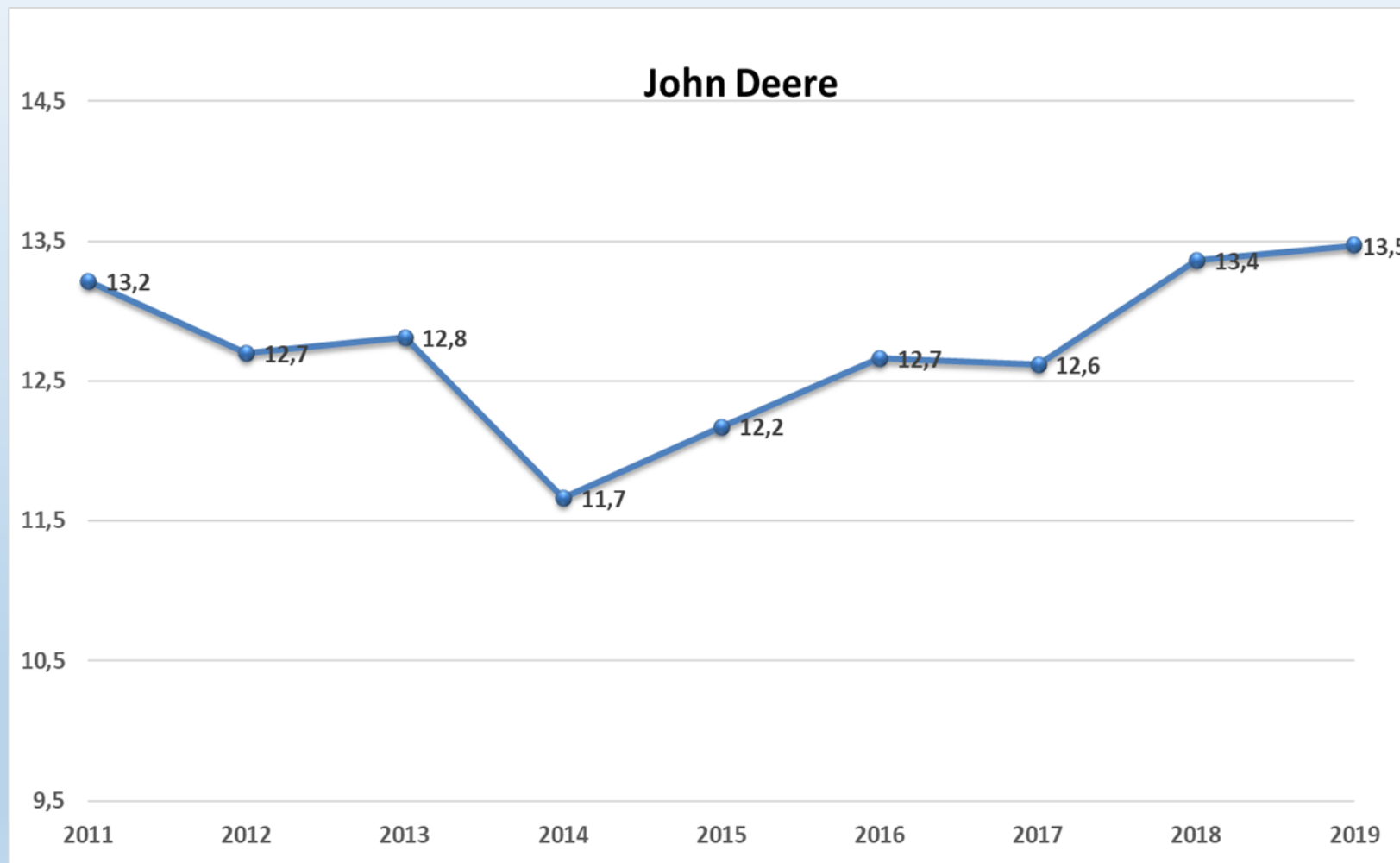
CLAAS





Evolution of the general average 2019/2011

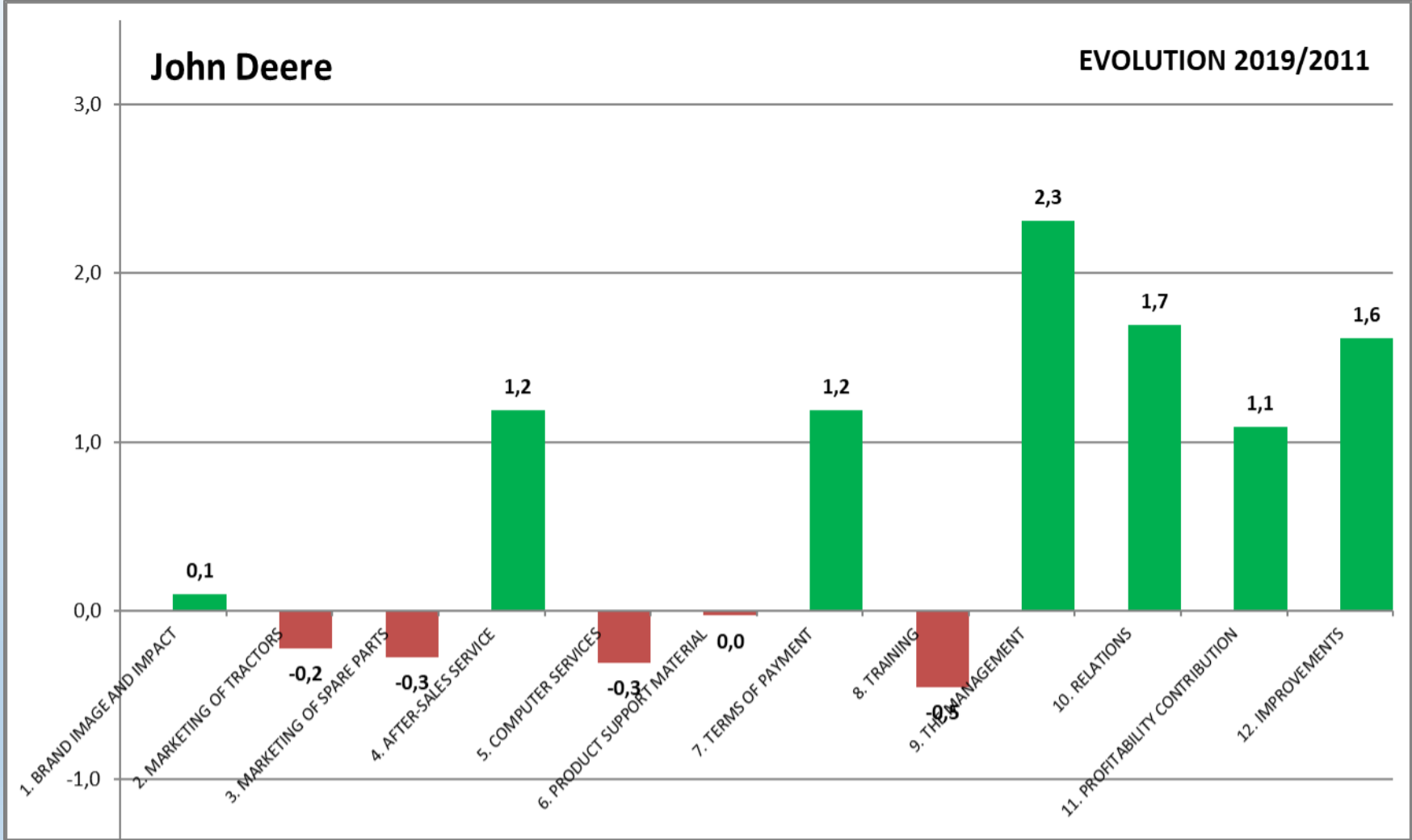
JOHN DEERE





Evolution of the general average 2019/2011

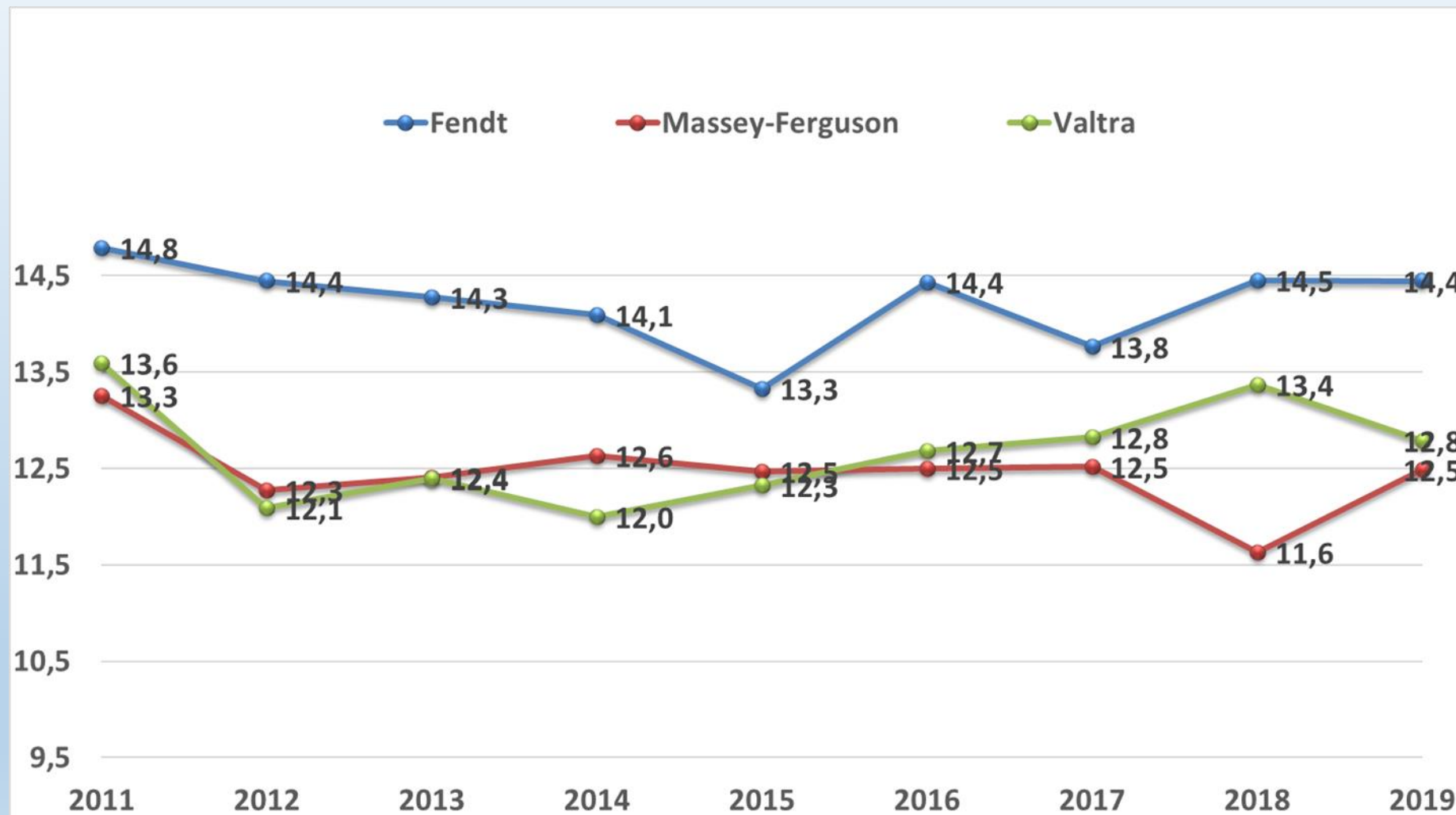
JOHN DEERE





Evolution of the general average 2019/2011

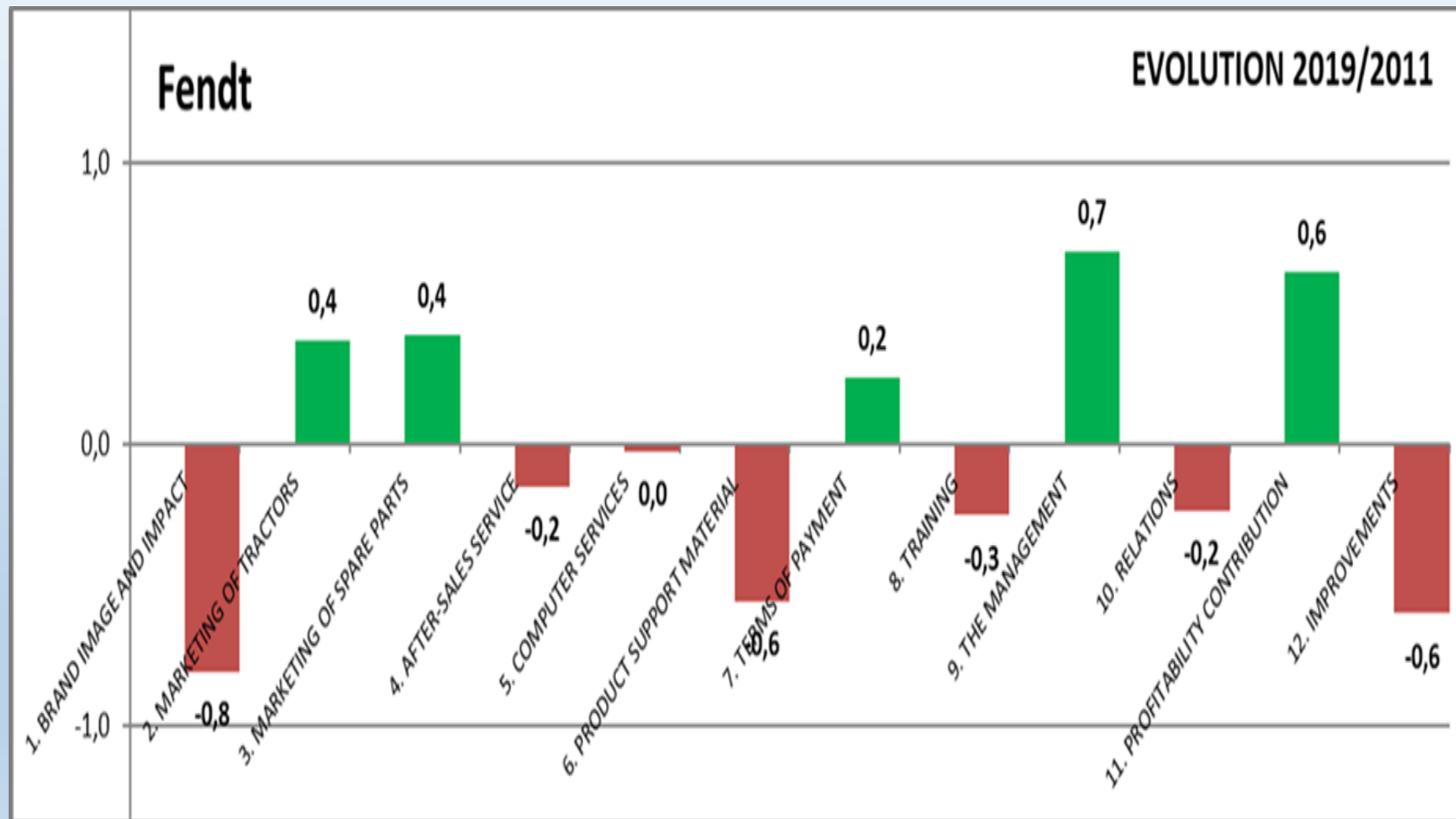
AGCO Brands





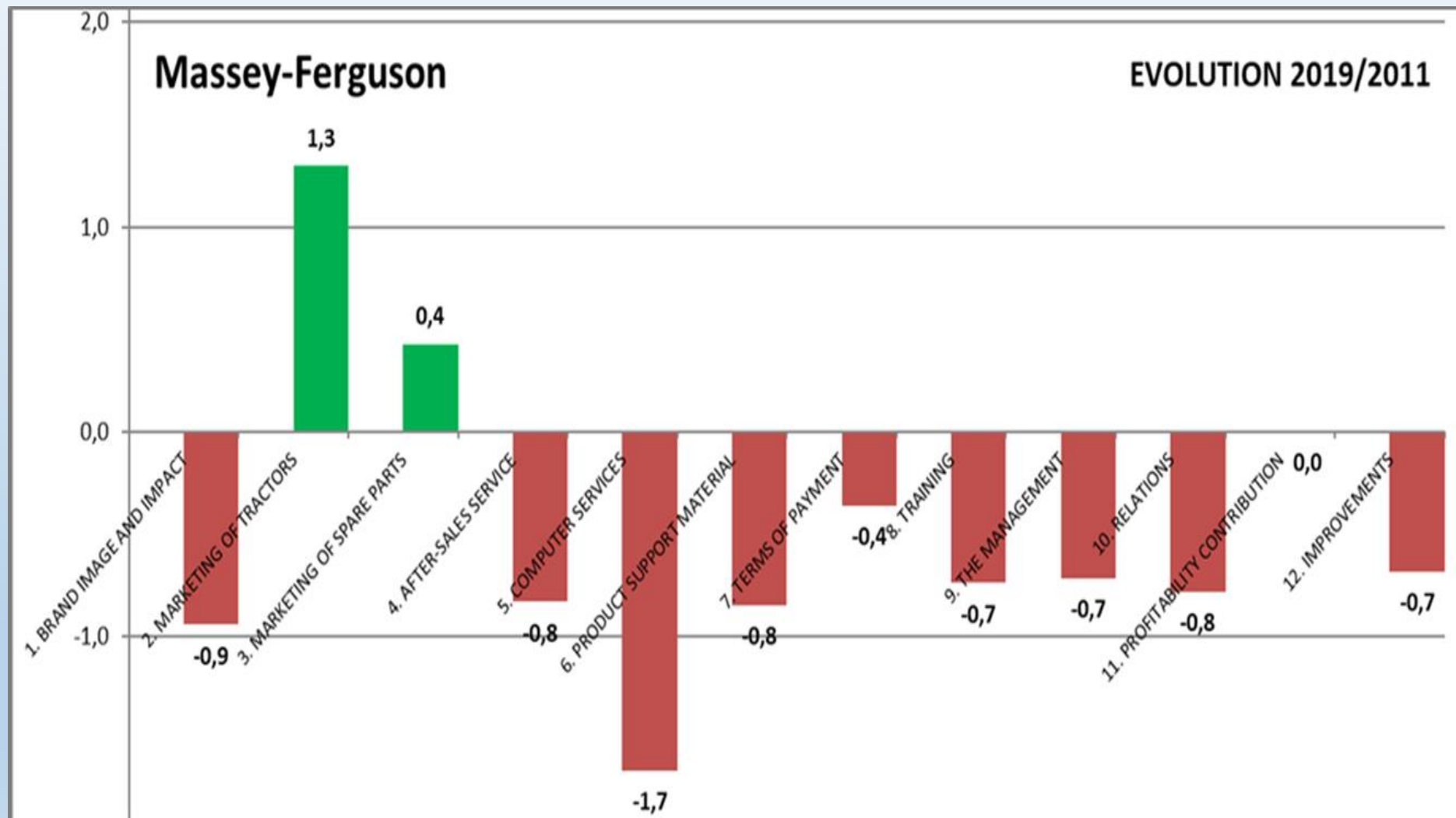
Evolution of the general average 2019/2011

AGCO Brands



Evolution of the general average 2019/2011

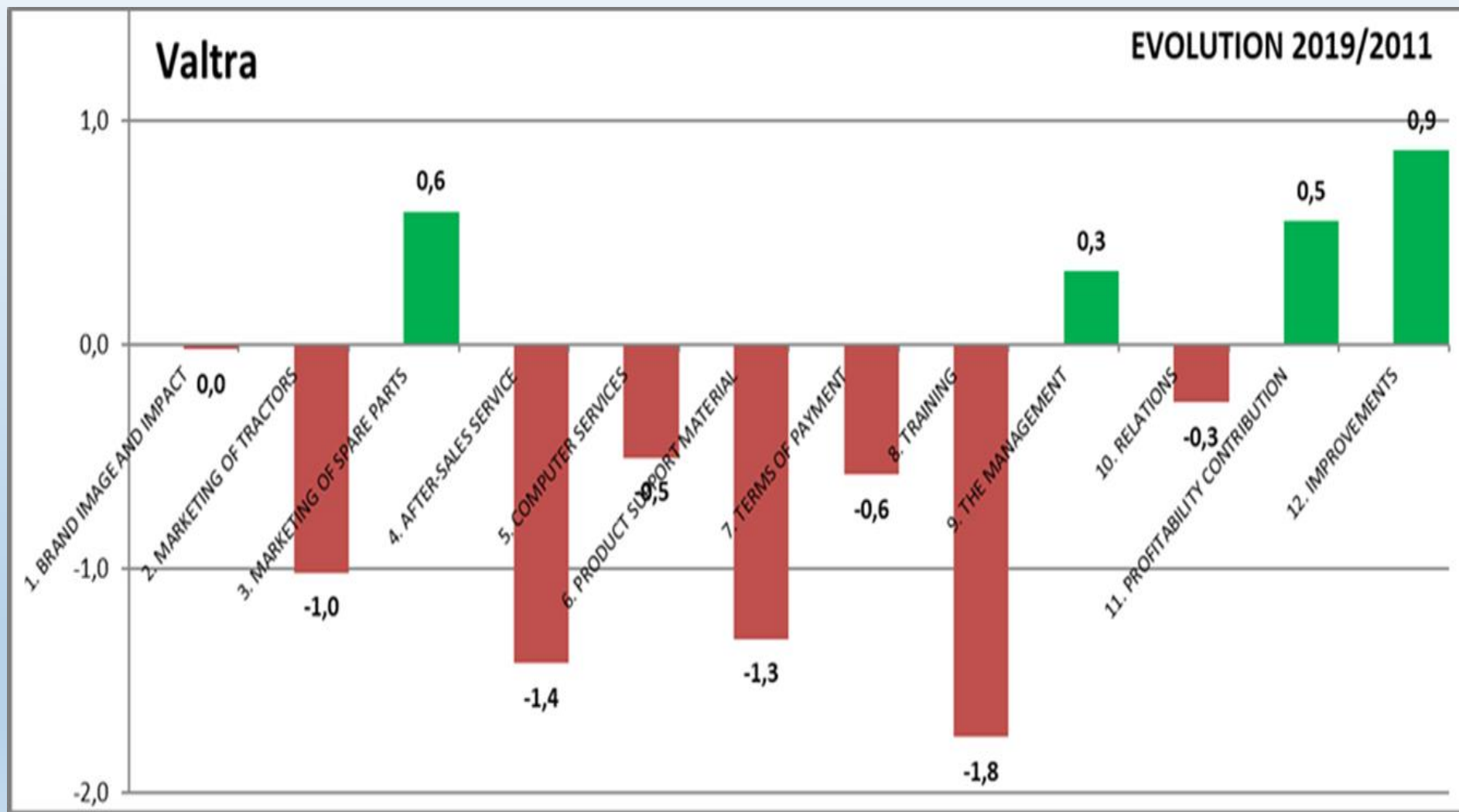
AGCO Brands





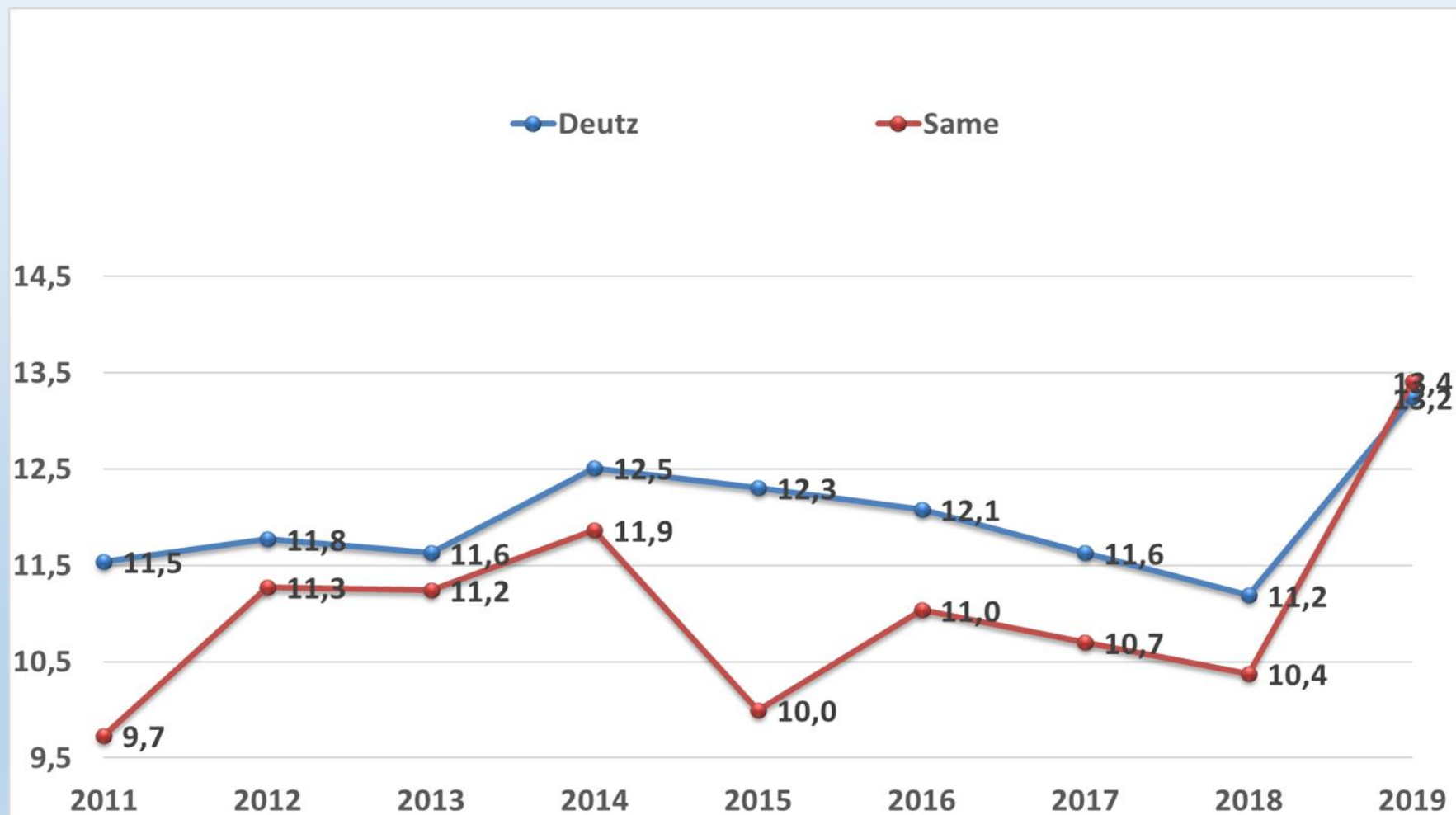
Evolution of the general average 2019/2011

AGCO Brands





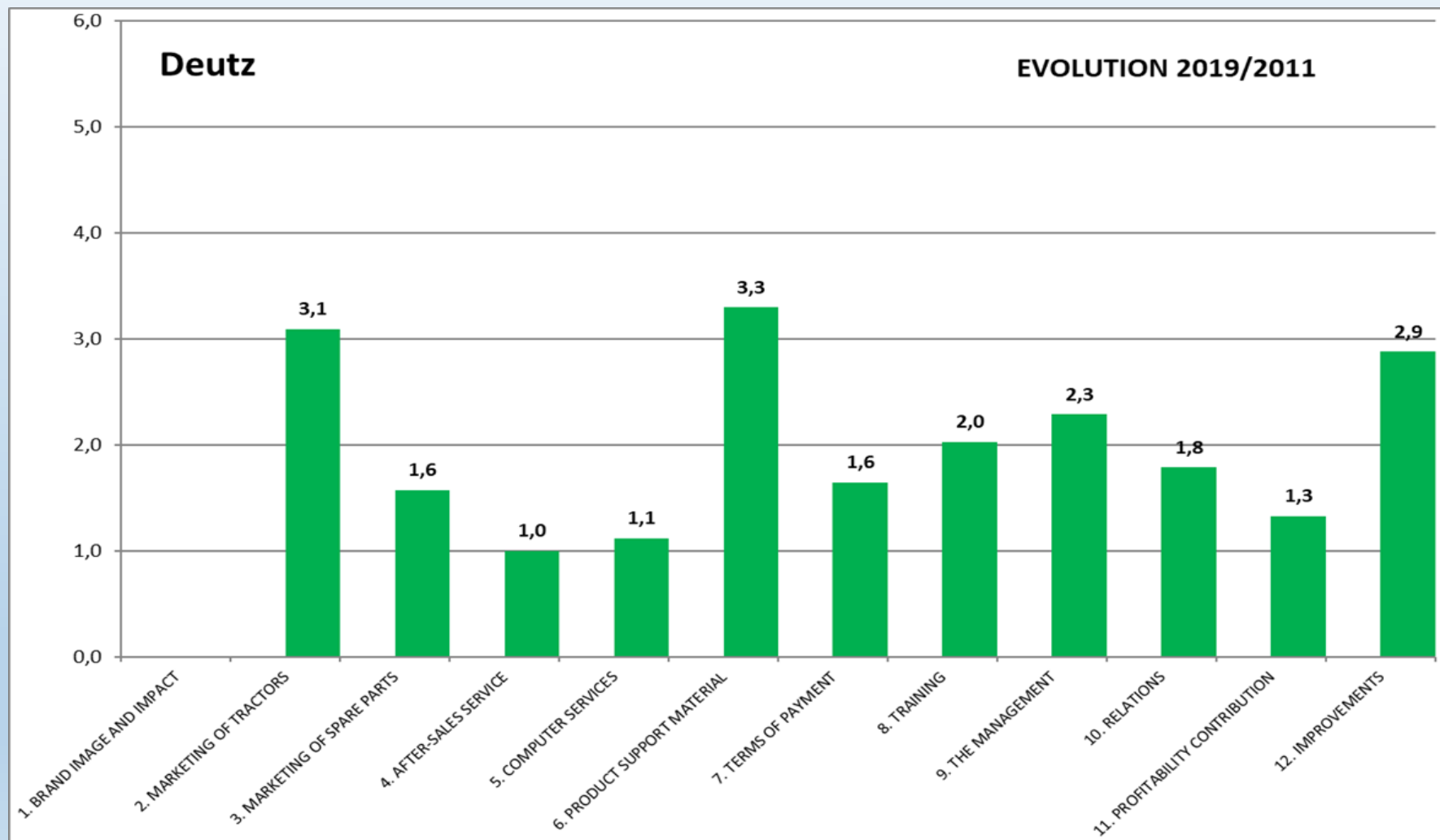
Evolution of the general average 2019/2011 SDF GROUP





Evolution of the general average 2019/2011

SDF GROUP

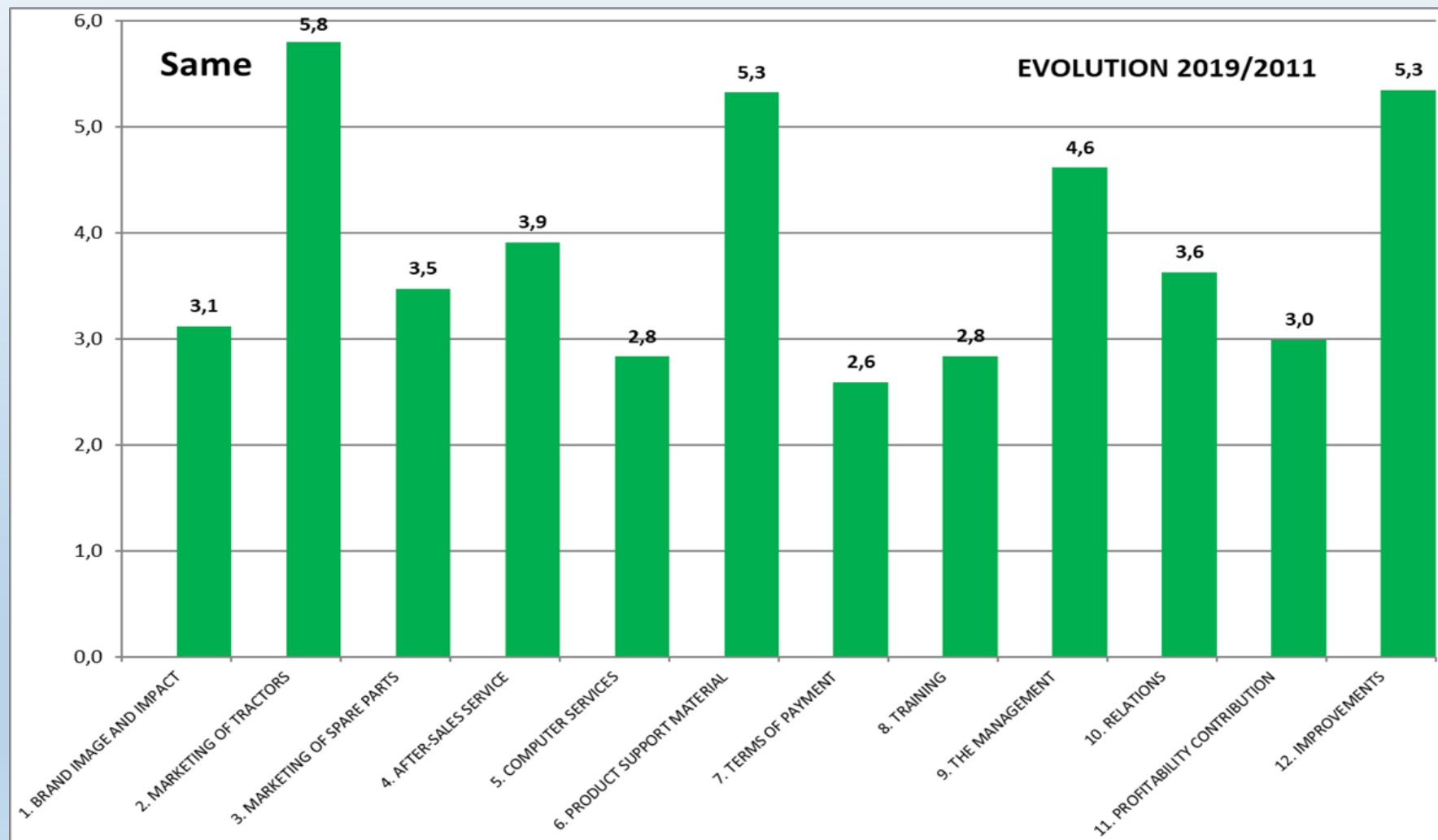


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Evolution of the general average 2019/2011

SDF GROUP

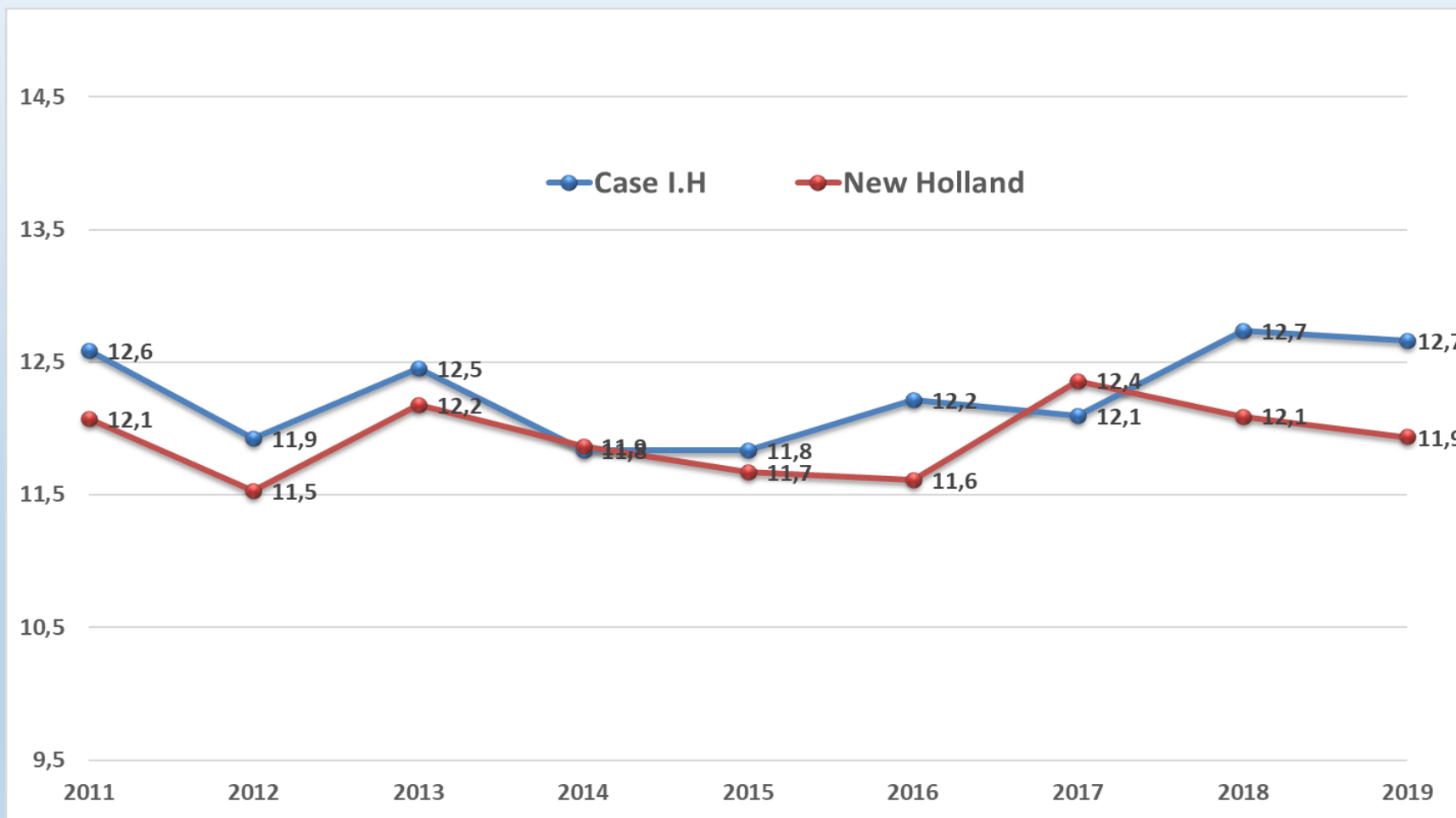


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Evolution of the general average 2019/2011

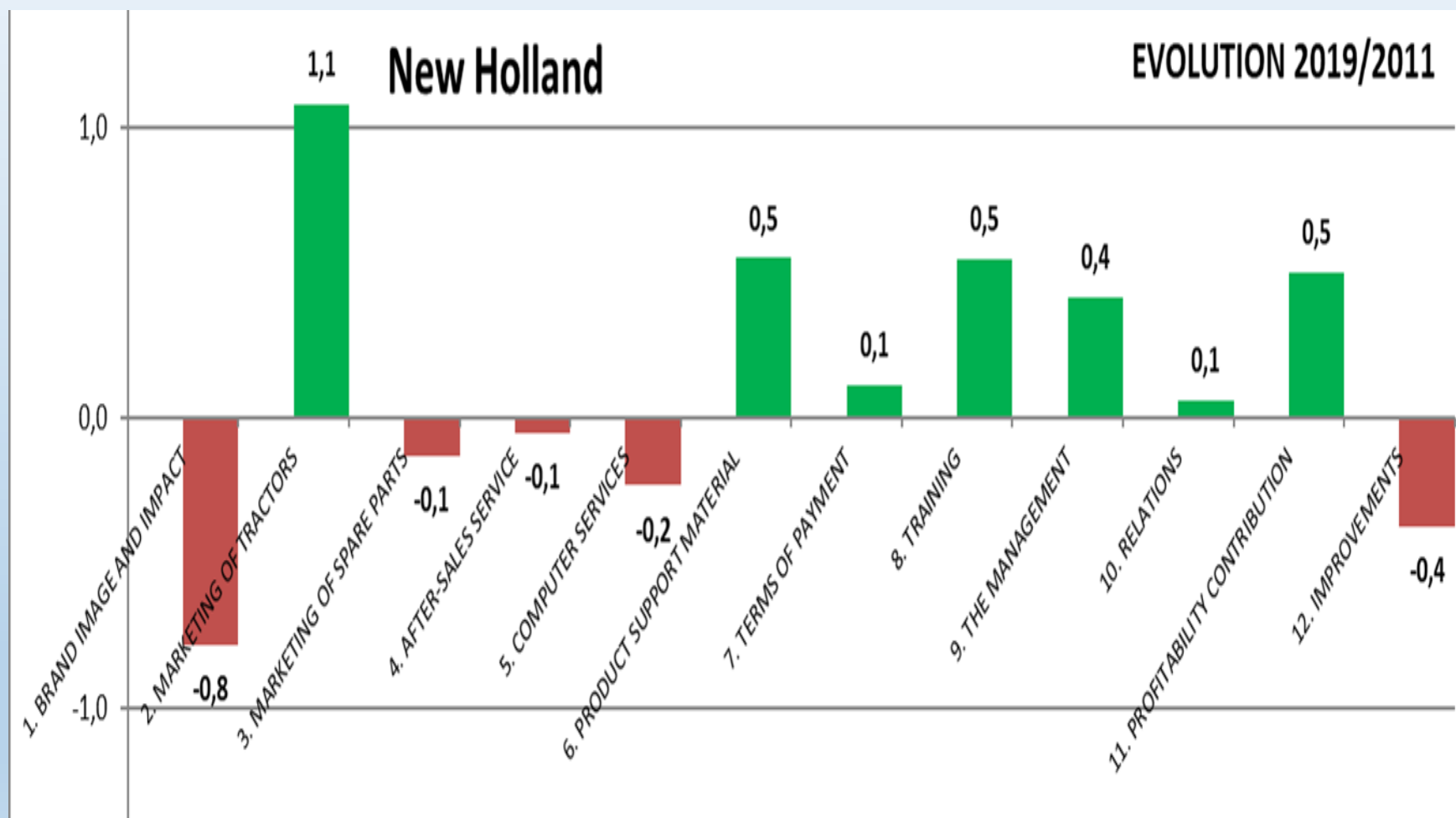
CASE I.H & New Holland





Evolution of the general average 2019/2011

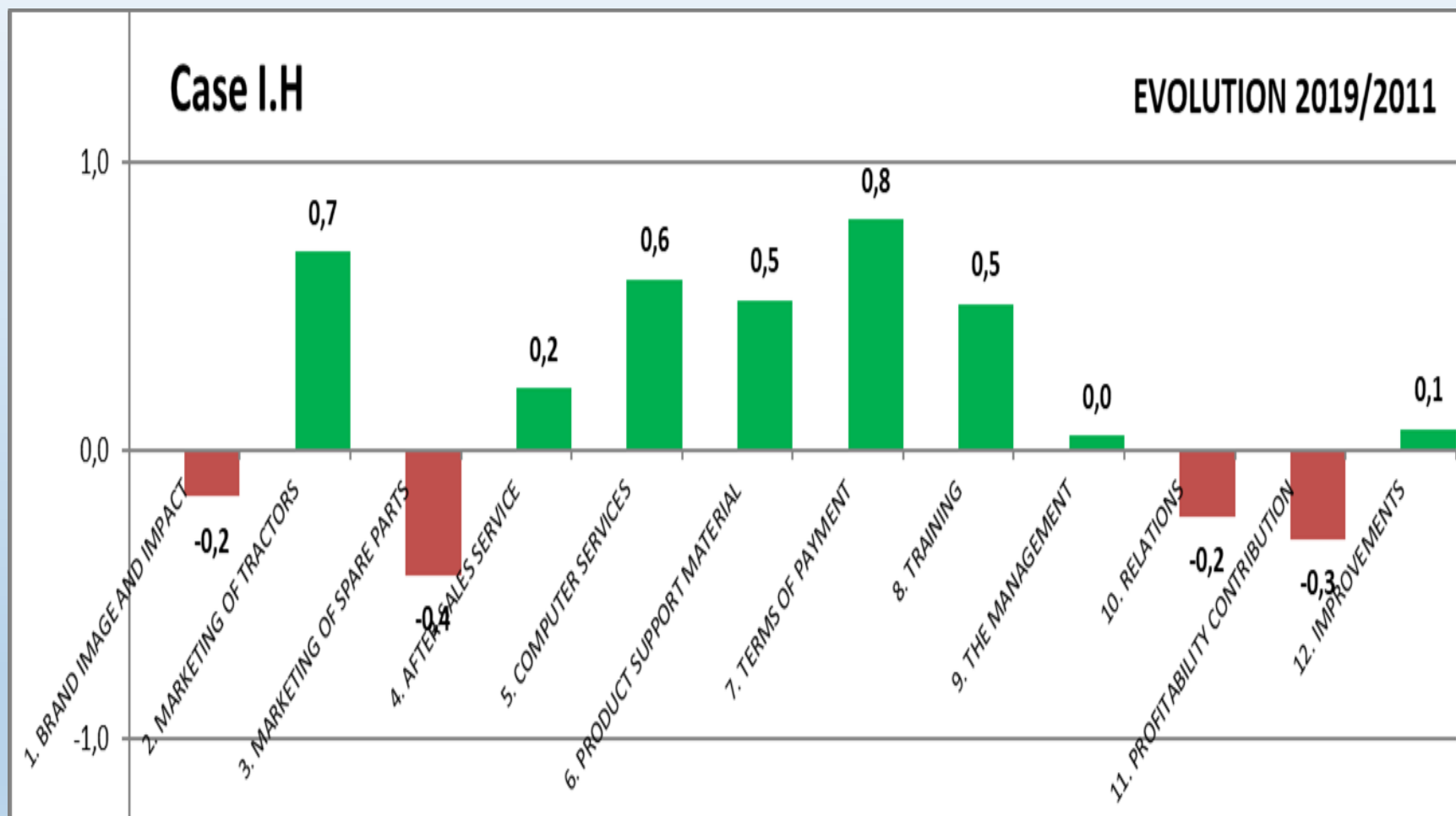
CASE I.H & New Holland





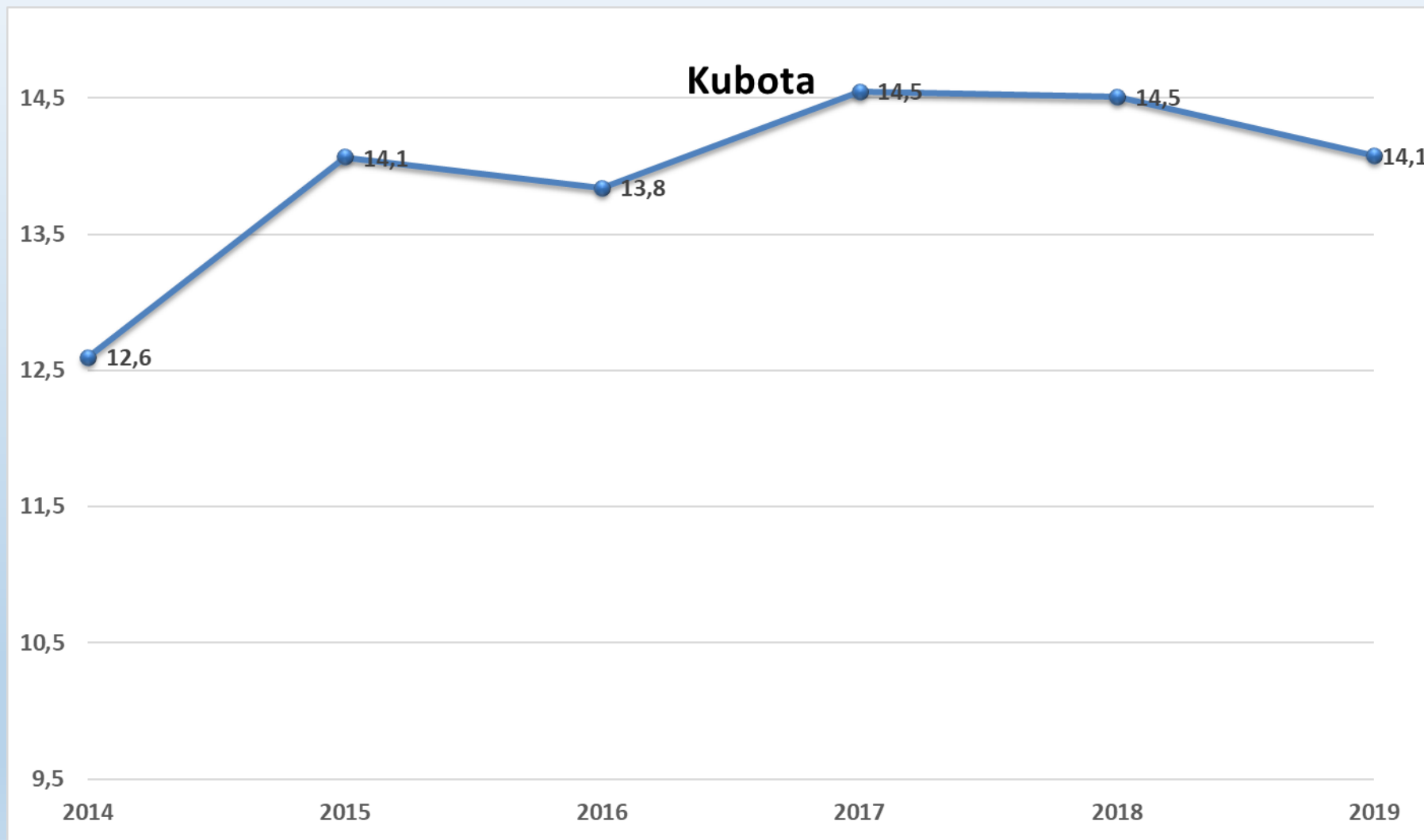
Evolution of the general average 2019/2011

CASE I.H & New Holland





Evolution of the general average 2019/2011 KUBOTA

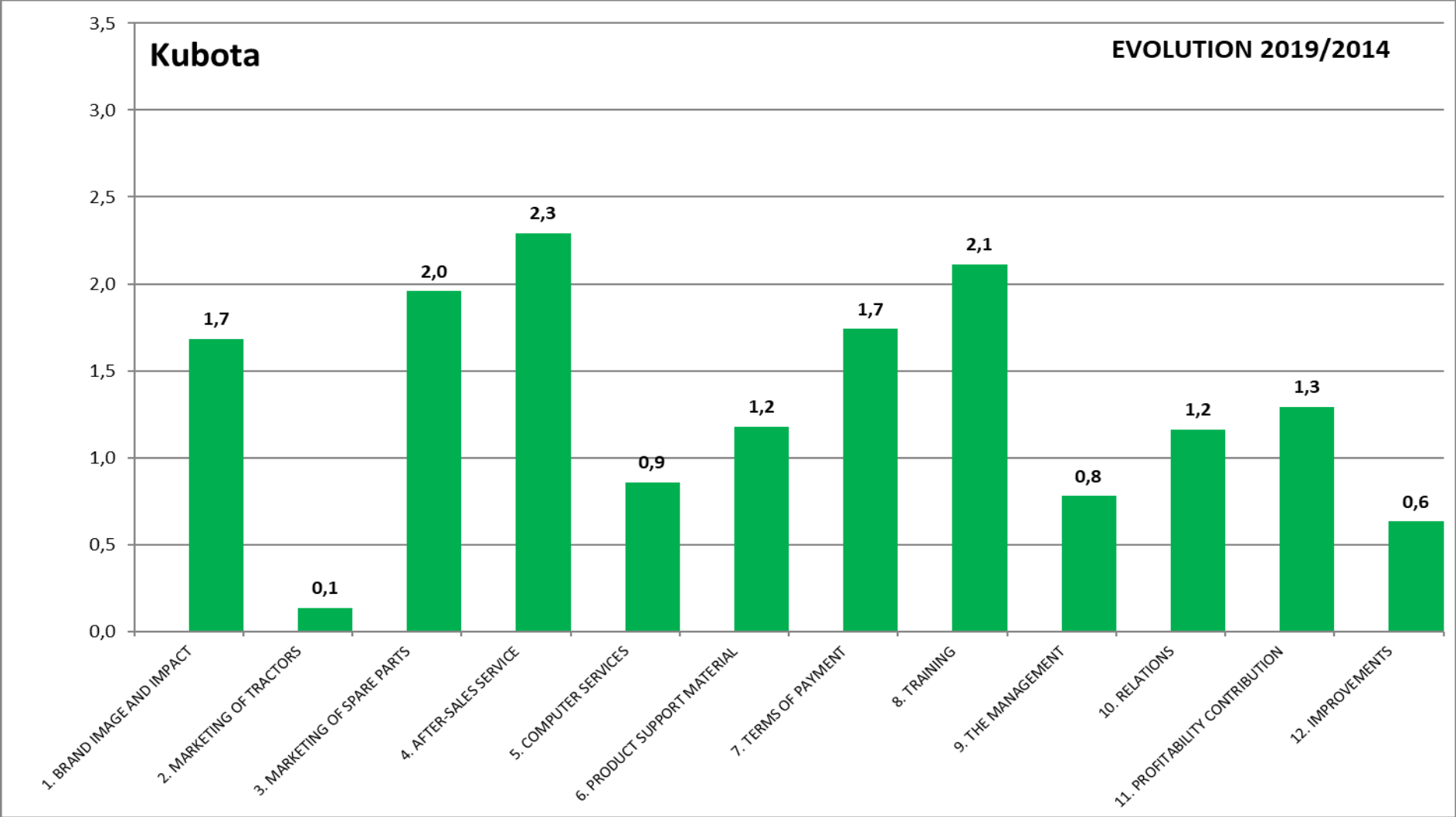


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Evolution of the general average 2019/2011

KUBOTA





Joint Statement on the future CAP

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CLIMMAR – CEMA- CEETTAR- COPA COGECA

Joint Statement

on the future COMMON AGRICULTURAL POLICY – CAP 2021-2027



Thun, Switzerland, 25th October 2019

All European citizens depend and rely on a well-functioning and competitive agricultural sector that provides safe, quality, nutritious food produced sustainably throughout the EU territory.

Society also demands for food to be produced in a manner that protects the countryside, the environment, animal welfare, that enhances biodiversity and contributes to combatting climate change. Family farms, agricultural cooperatives, contractors and other agricultural undertakings in all their diversity play a key role in achieving these objectives.

The signatories strongly believe that the future of the EU requires a more ambitious budget than the one proposed by the European Commission. One that calls for a higher level of commitment by Member States; one that will deliver on the Union's challenges and priorities; one that will not undermine nor put at stake current common policies such as the CAP. One that is commensurate with farmers' delivering a higher level of ambition for the environment and the climate.

We believe that the CAP budget represents a very small investment that in return provides substantial and wide-ranging gains for European citizens which are sometimes taken for granted. If we are to maintain these benefits, we must also continue to have a strong CAP backed by a strong budget.

This is how the ambitious targets for the climate, environment, competitiveness, growth and jobs can be met all the while looking at modernising the agricultural sector through investments and innovative technologies (digital and other).

The CAP is the foundation of the European Union and must remain a strong, common and adequately financed policy.

Farmers, their cooperatives, as well as manufacturers, dealers and contractors of agricultural & forestry machines and service in the agri-food supply chain are ready and willing to do their utmost to get the European Union on a more solid economic footing.



High attention to the theme: Education, recruitment and retaining

Some conclusions for CLIMMAR to work on:

- Main topic during last CLIMMAR congress in Thun
- Hosted by the Swiss Training Centre in Aarberg
- Activities with Euro and World Skills should continue
- Consider raising (EU) funds to attract and educate (young) talent in the ag-tech industry
- Erasmus+ could be used to produce promotional materials, videos from Euroskills as career guidance and marketing material.
- Start a European promotion / image-building program for careers in the Ag-tech industry. At this moment there are country specific initiatives but there is no common program for attracting young people.



CLIMMAR's PROMOTION OF THE TRADE

Working together with national country initiatives to promote careers in land-based engineering to create qualified and competent organizations and employees



CLIMMAR report of Activities 2018-2019



Download the report
on:
www.climmar.com



Thank you for your attention!
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WWW.CLIMMAR.COM

