



# 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 Digital EIMA Platform 2020

**Introduction to the highlights of CLIMMAR-  
activities in 2020**



# 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:**

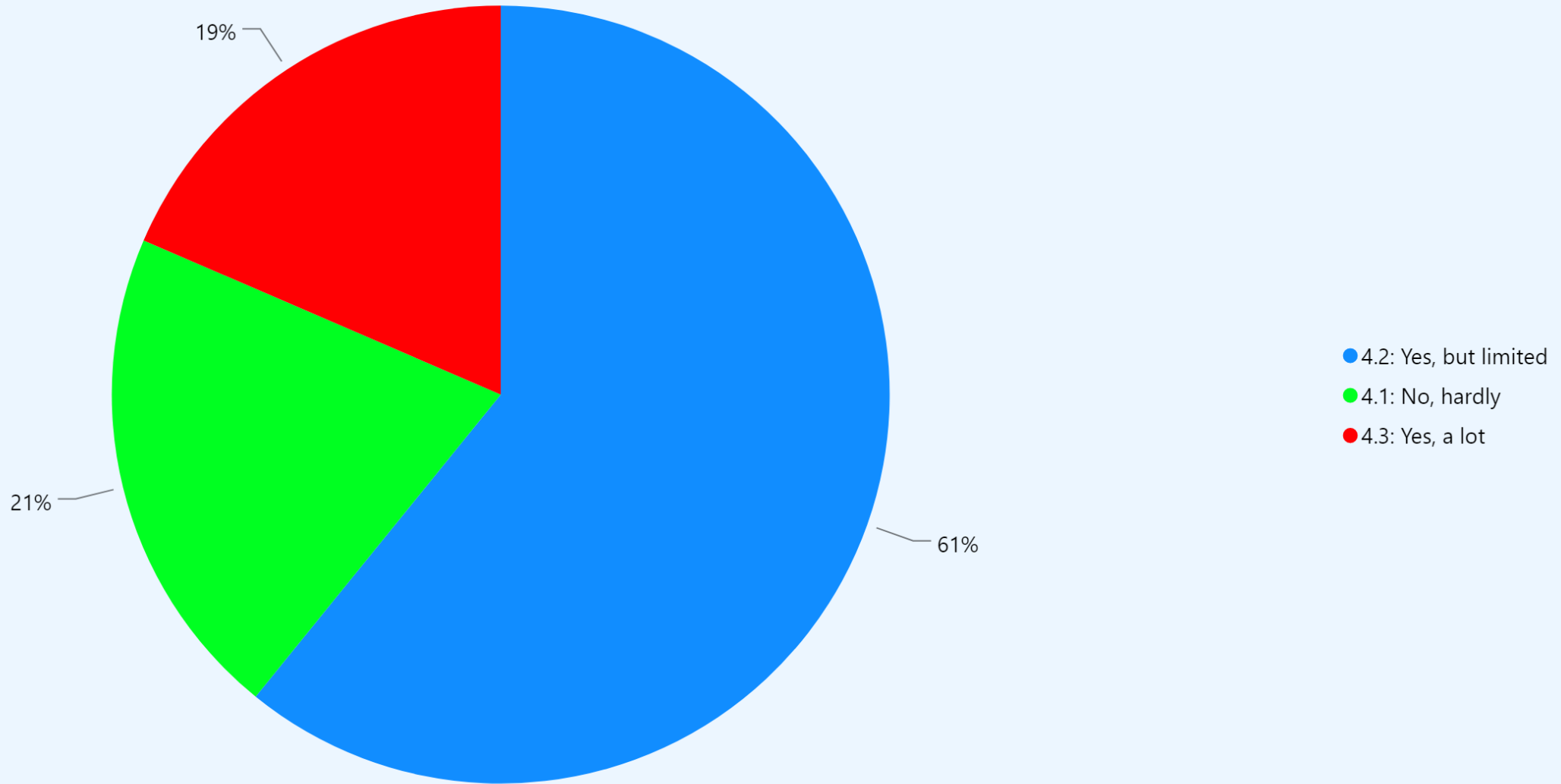
- **A particular year due to COVID-19**
- **The Branchreports & CLIMMAR Index**
- **The EU results DSI 2019**
- **Lobby activities CLIMMAR**



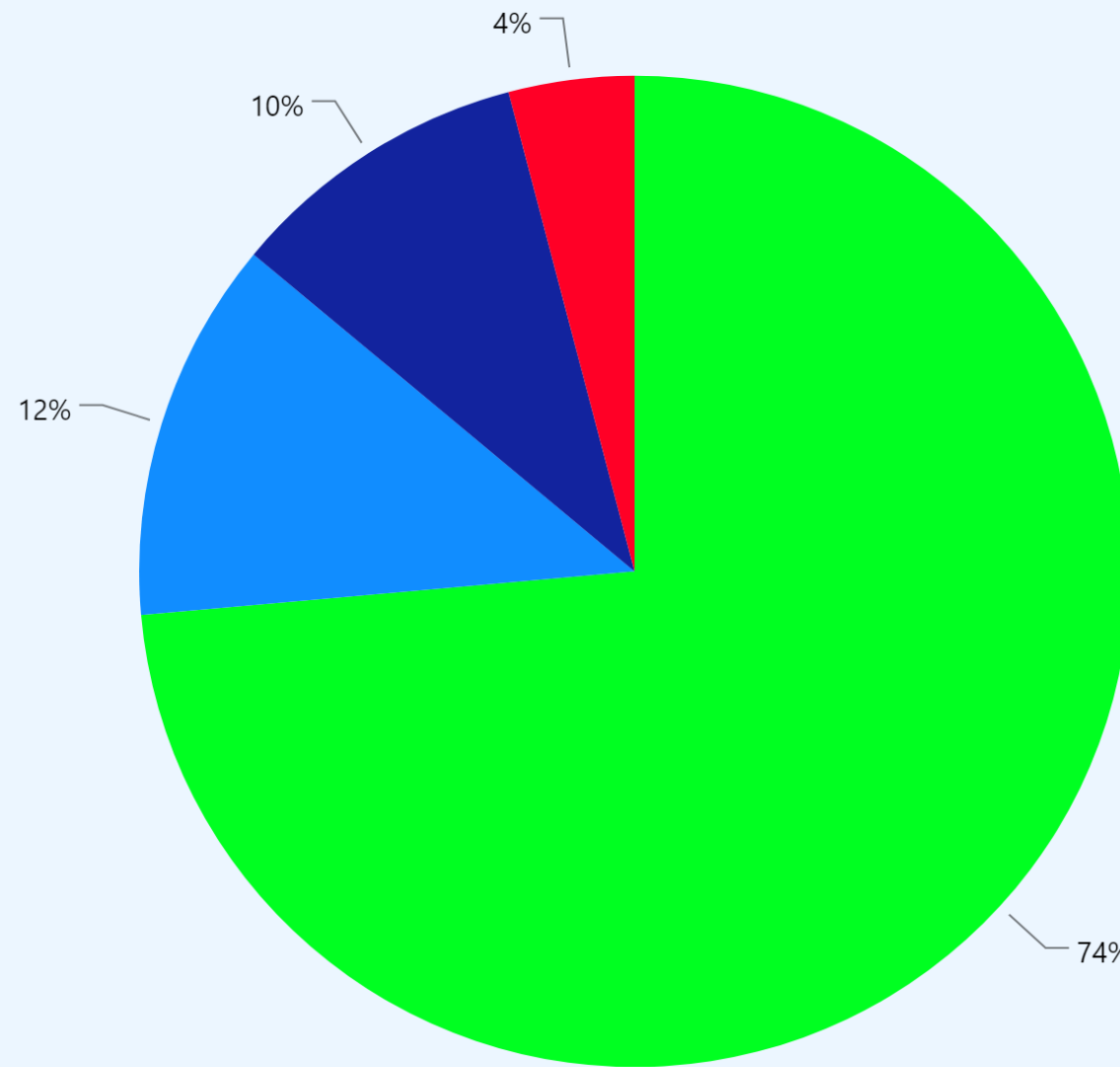
# CLIMMAR COVID-19 SURVEY

- Purpose: a quick scan assessment of the COVID-19 situation amongst the European dealers
- Running time: the survey was held between 8-29 of May 2020
- Participation: 14 countries participated in the survey
- Responses: in total 660 dealercompanies responded to the survey

# Are you currently experiencing consequences due to the COVID-19 crisis?

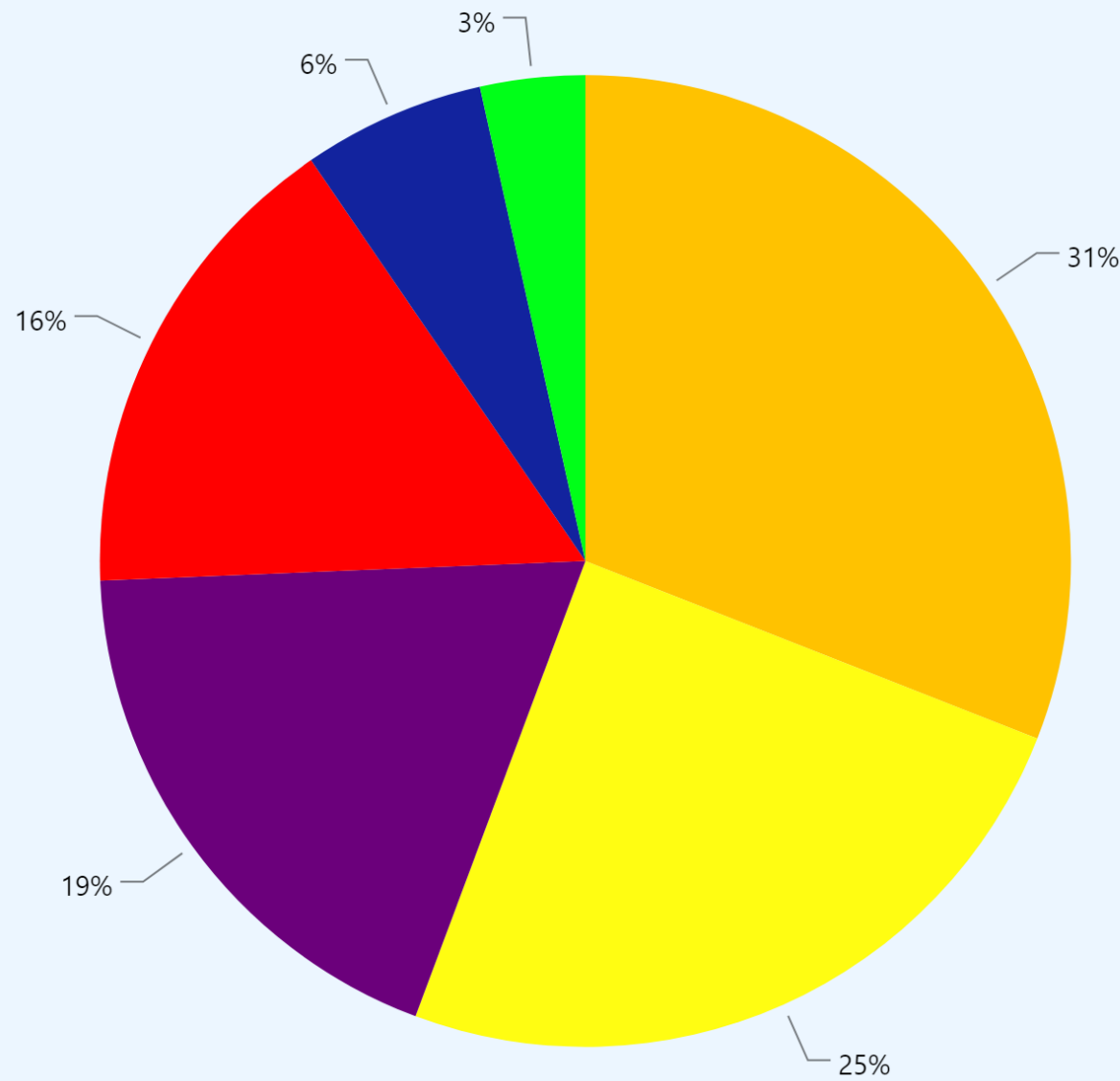


In which part of your company do your experience the most impact of the COVID-19 Crisis ?



- 7.3: Sales Department
- 7.2: Components & Parts shop
- 7.1: Repair & Maintenance workshop
- 7.4: Administration Office

What do you expect your company's turnover and orderbook to be affected in the coming 3 months?



- 12.5: Decrease more than 10%
- 12.4: Decrease less than 10%
- 12.3: Virtually no change
- 12.6: Decrease more than 25%
- 12.2: Increase less than 10%
- 12.1: Increase more than 10%

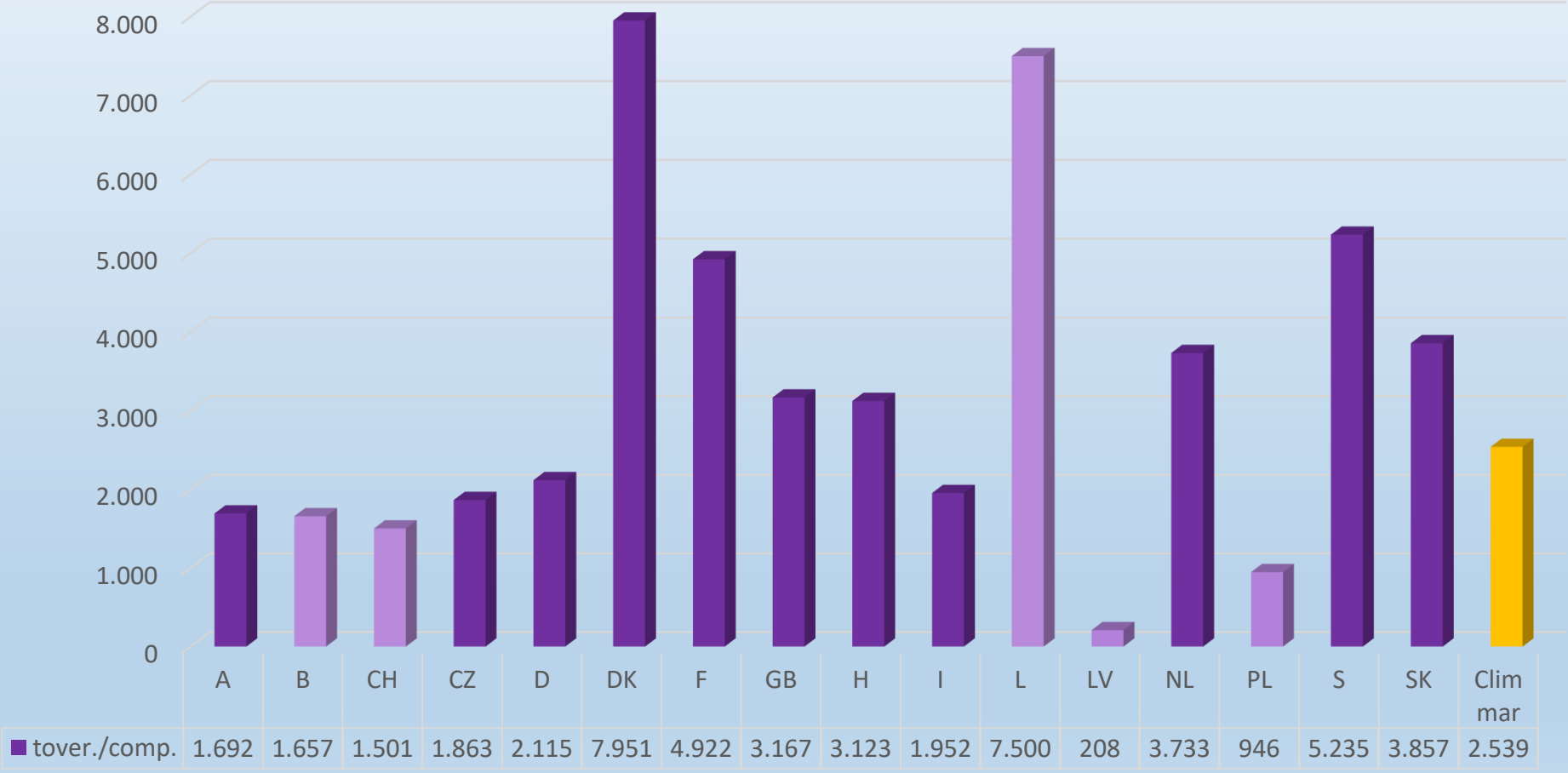




# **The Branchreports & CLIMMAR Index**



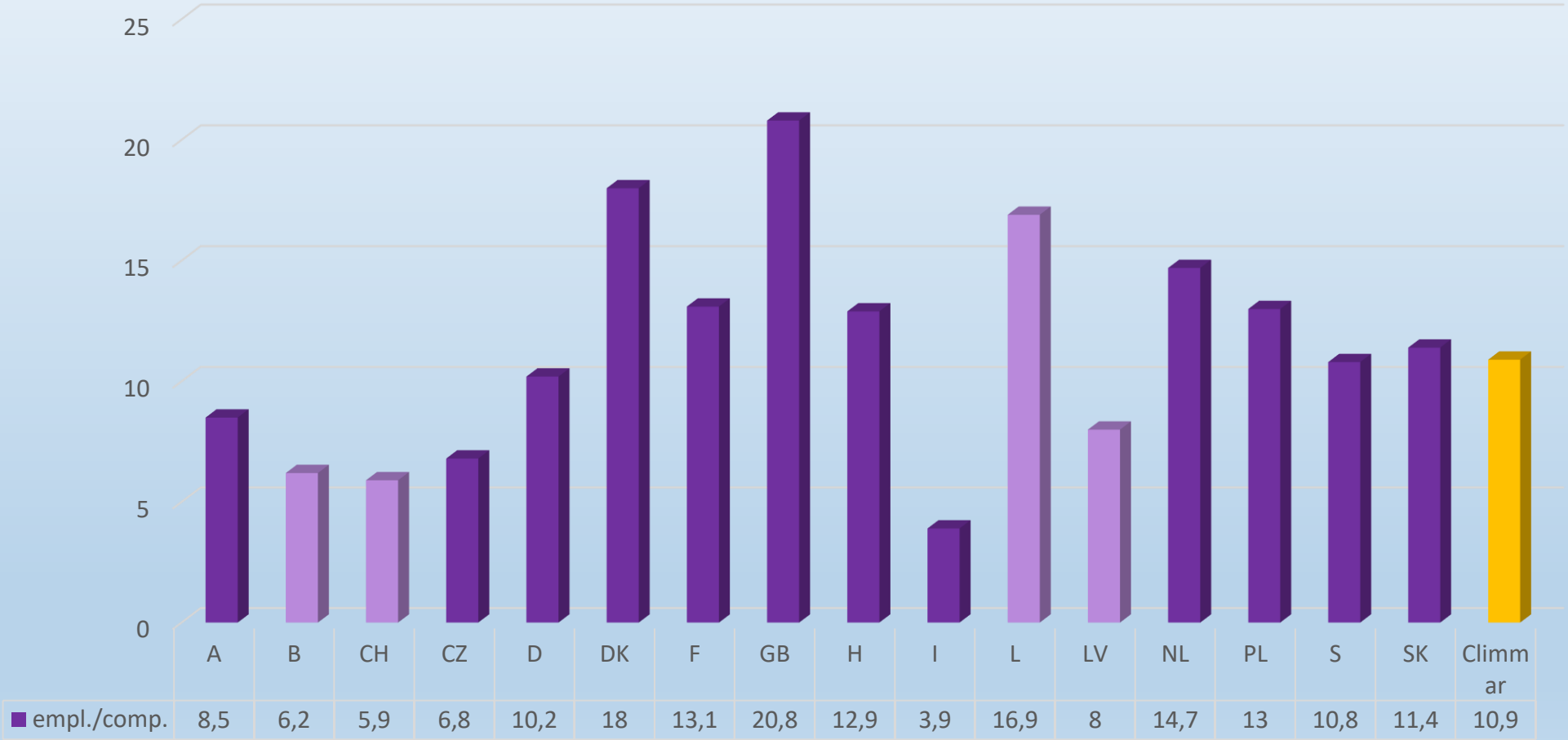
Relations - Turnover per Company: **2,539** €/comp.



Source: CLIMMAR

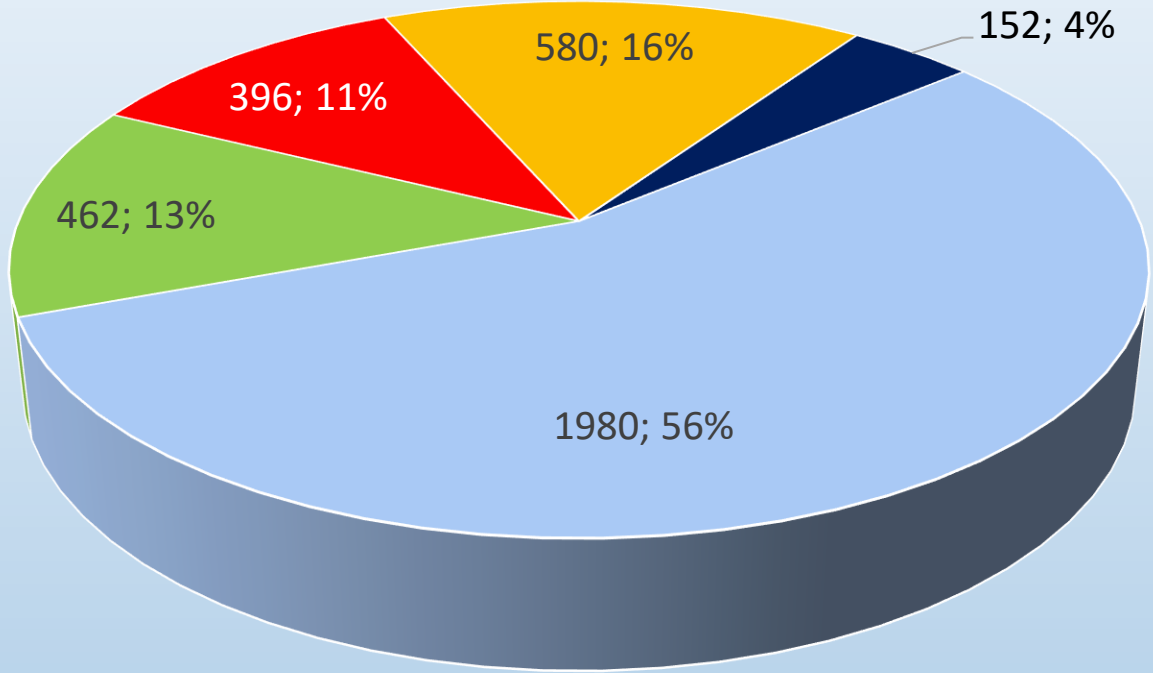


### Relations - Employees per Company: 10,9



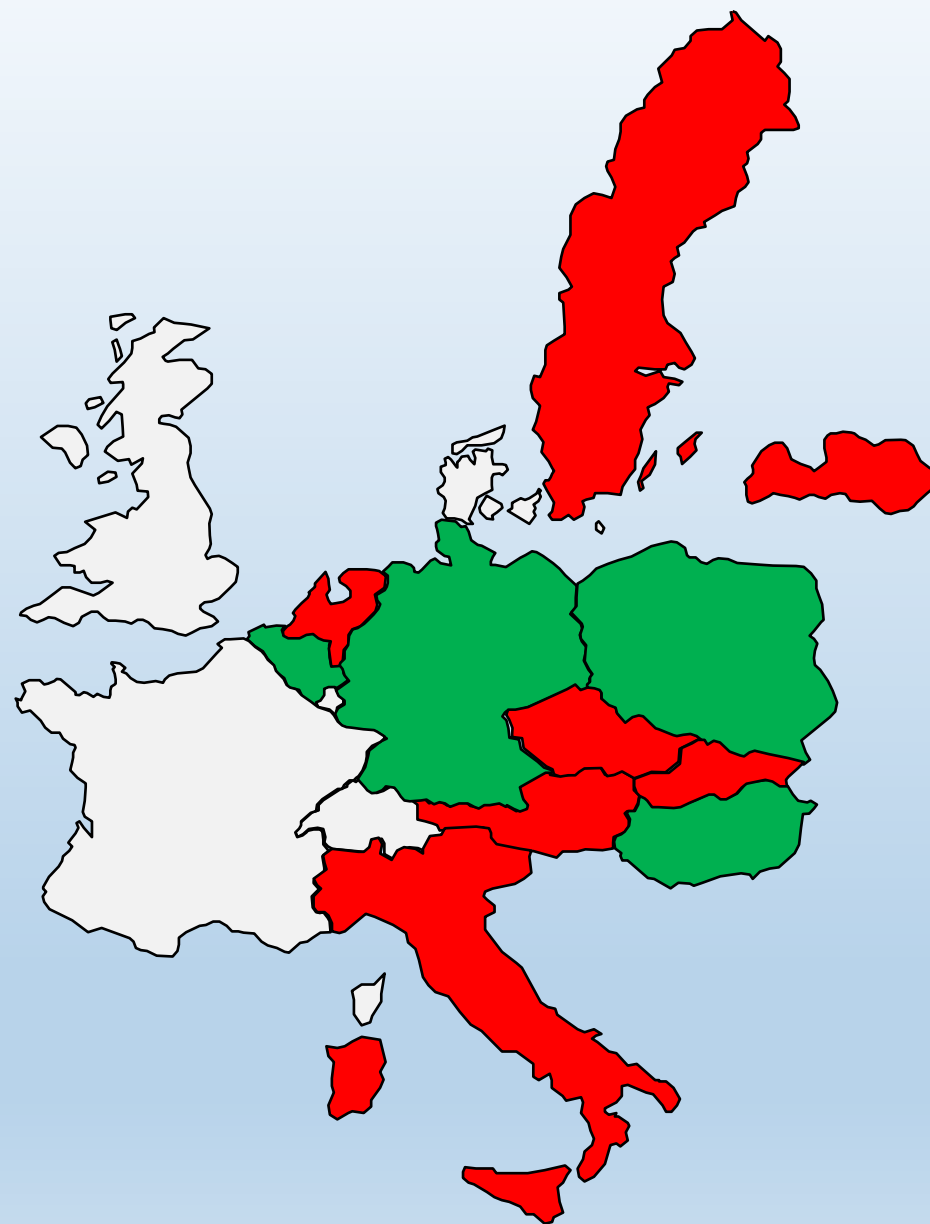
Source: CLIMMAR

### turnover-structure of the average CLIMMAR-dealer







total:  
3,570,000 €/comp.

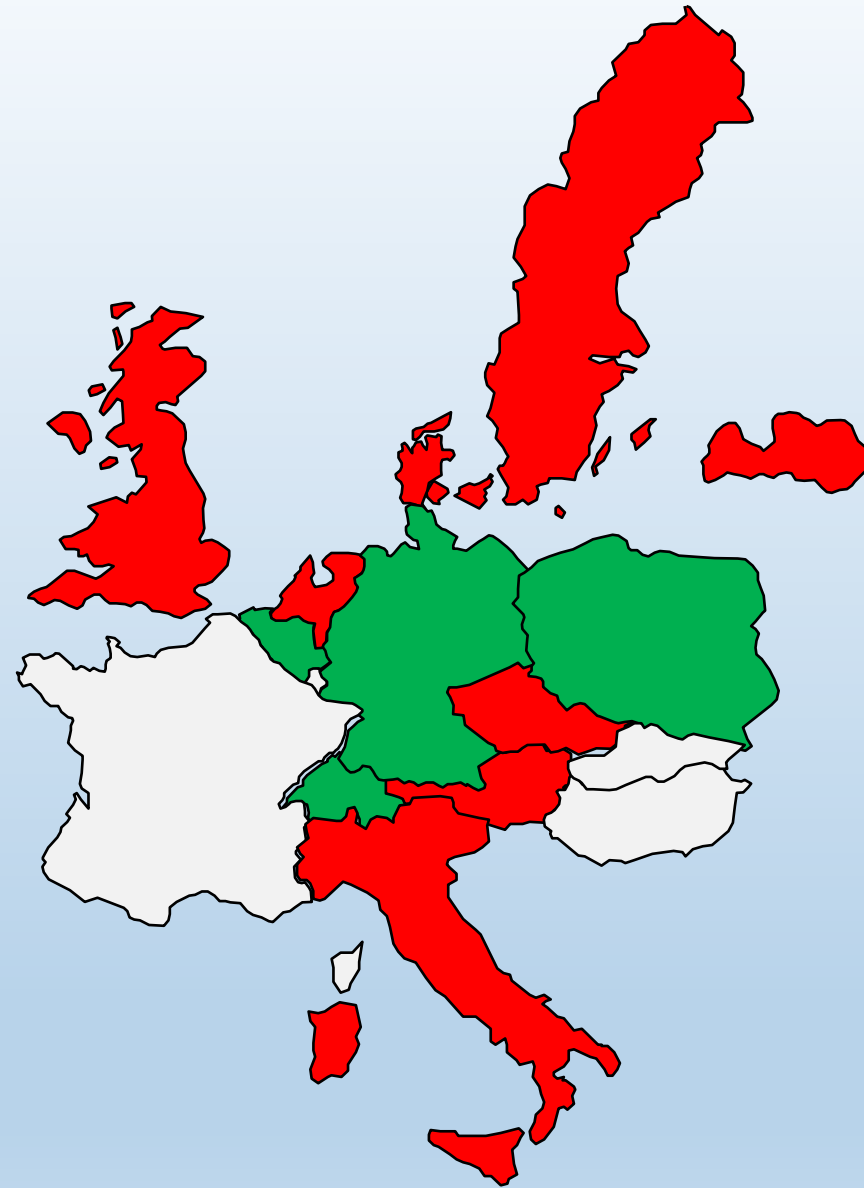
- new equipm.
- second hand
- workshop
- parts
- externals



## Turnover total

**development** of turnover in the first half of 2020 compared with the same period 2019:

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



## Turnover new equipment

development of turnover in the first half of 2020 compared with the same period 2019:

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



## Turnover workshop





development of turnover in the first half of 2020 compared with the same period 2019:

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



## Turnover spareparts

development of turnover in  
the first half of 2020  
compared with the same  
period 2019:

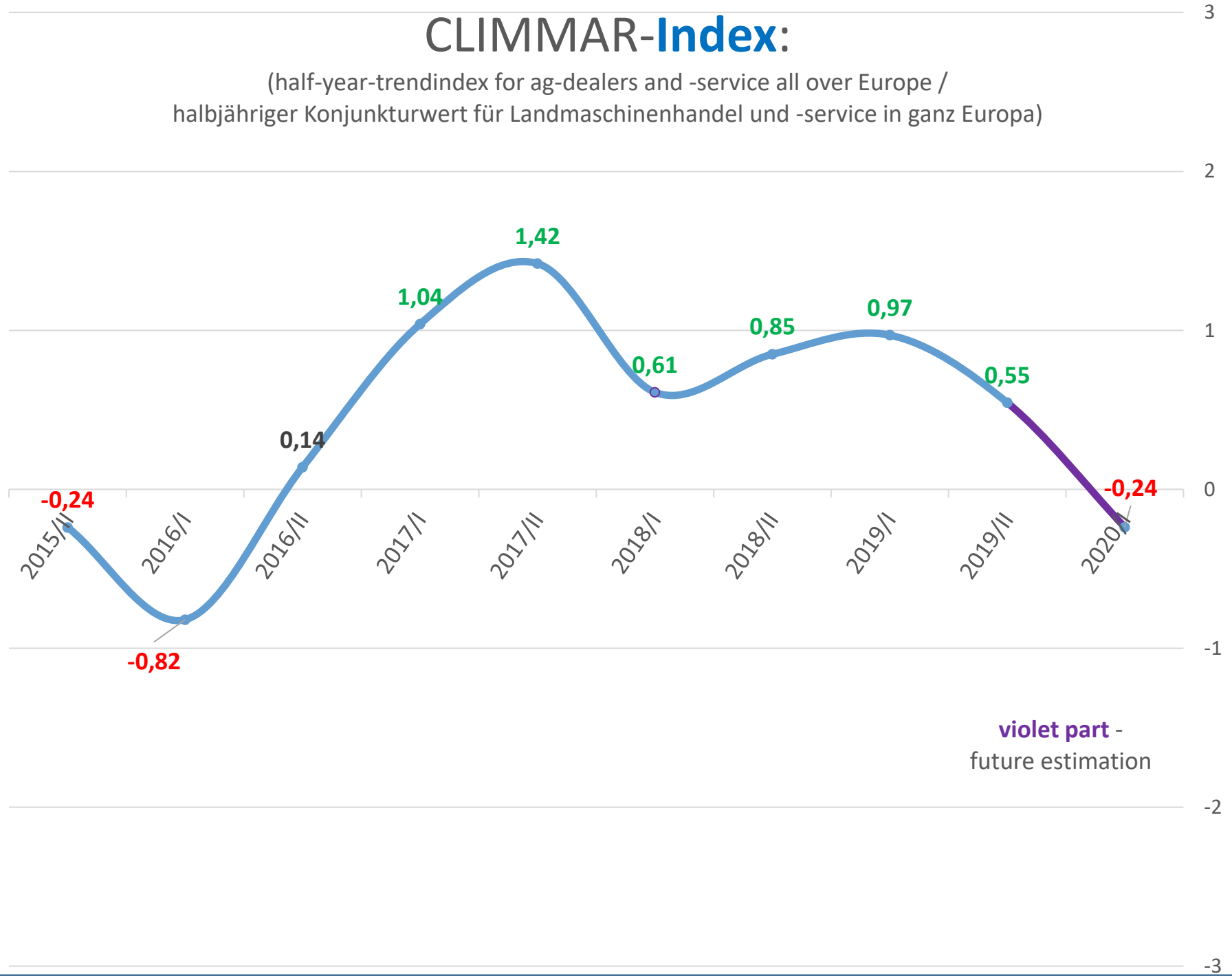
-  less / worse / decrease
-  equal
-  more / growing / increase
-  no answer





# CLIMMAR-Index:

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





## CLIMMAR-Index:

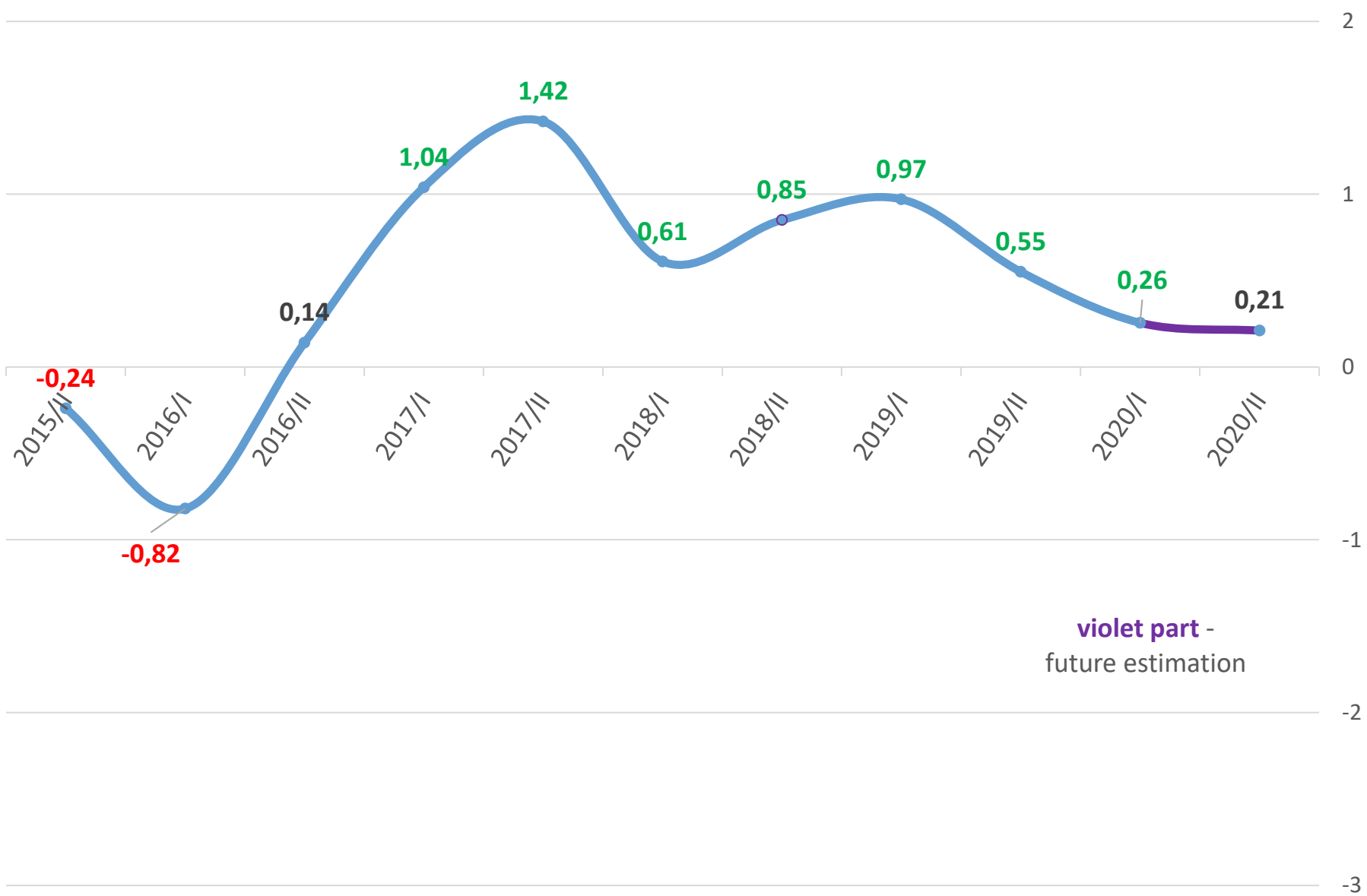
(half-year-trendindex for ag-dealers and -service all over Europe /  
halbjähriger Konjunkturwert für Landmaschinenhandel und -service in ganz Europa)





# 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 2020

10th survey



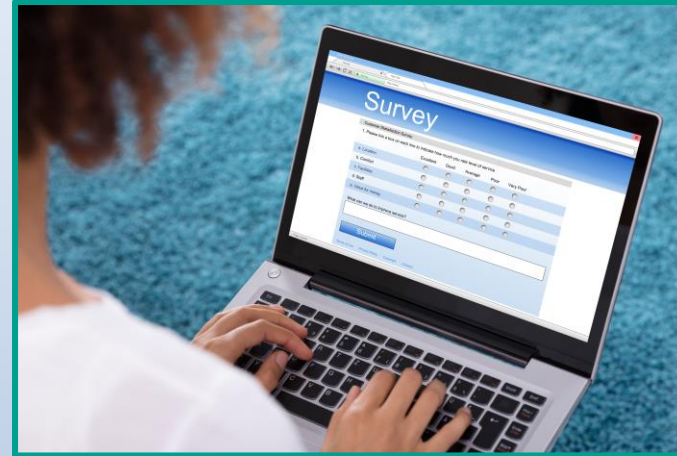
CLIMMAR  
Centre de Liaison International  
des Marchands de Machines Agricoles  
et Réparateurs

# ONLINE SURVEY



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

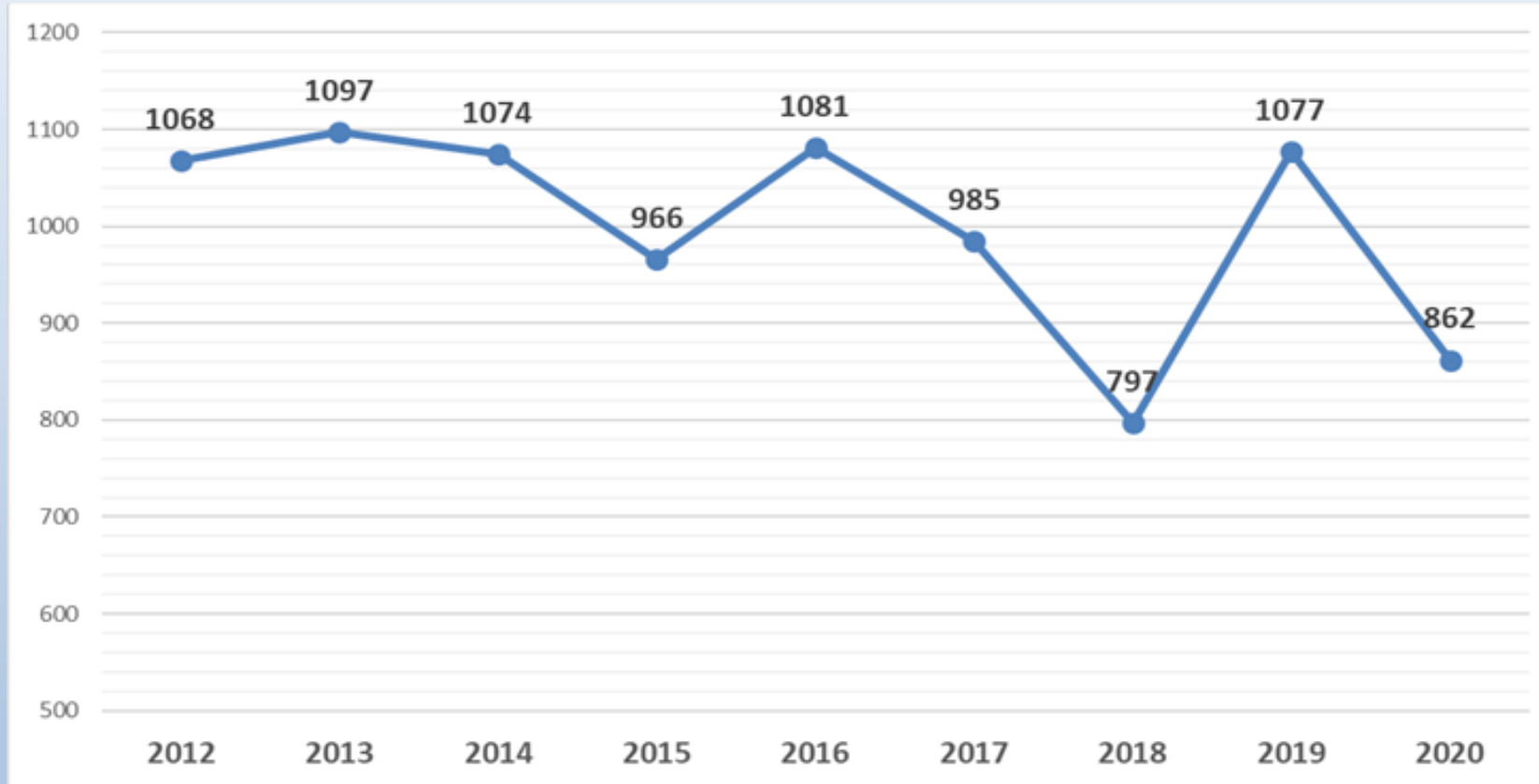
End : July 24th



8 countries included



# Participation



The drop is explained by the fact that two countries (UK and Austria) were unable to investigate due to COVID 19



## PART II

## 2020 RESULTS /2019



# 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: 2020 > 2019

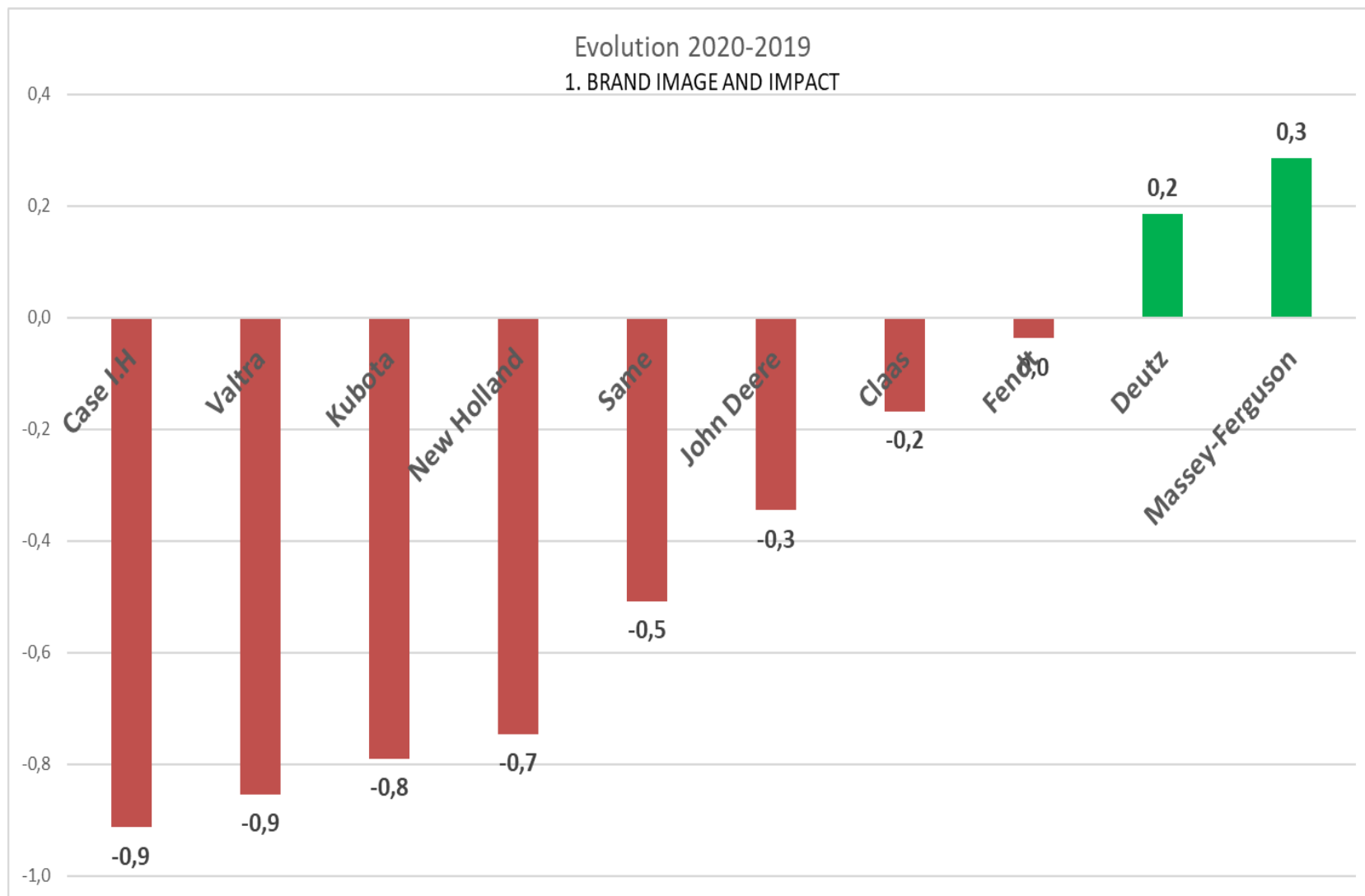


Average figure

2019



2020





# AVERAGE FOR TRAINING

Trend: 2020 > 2019

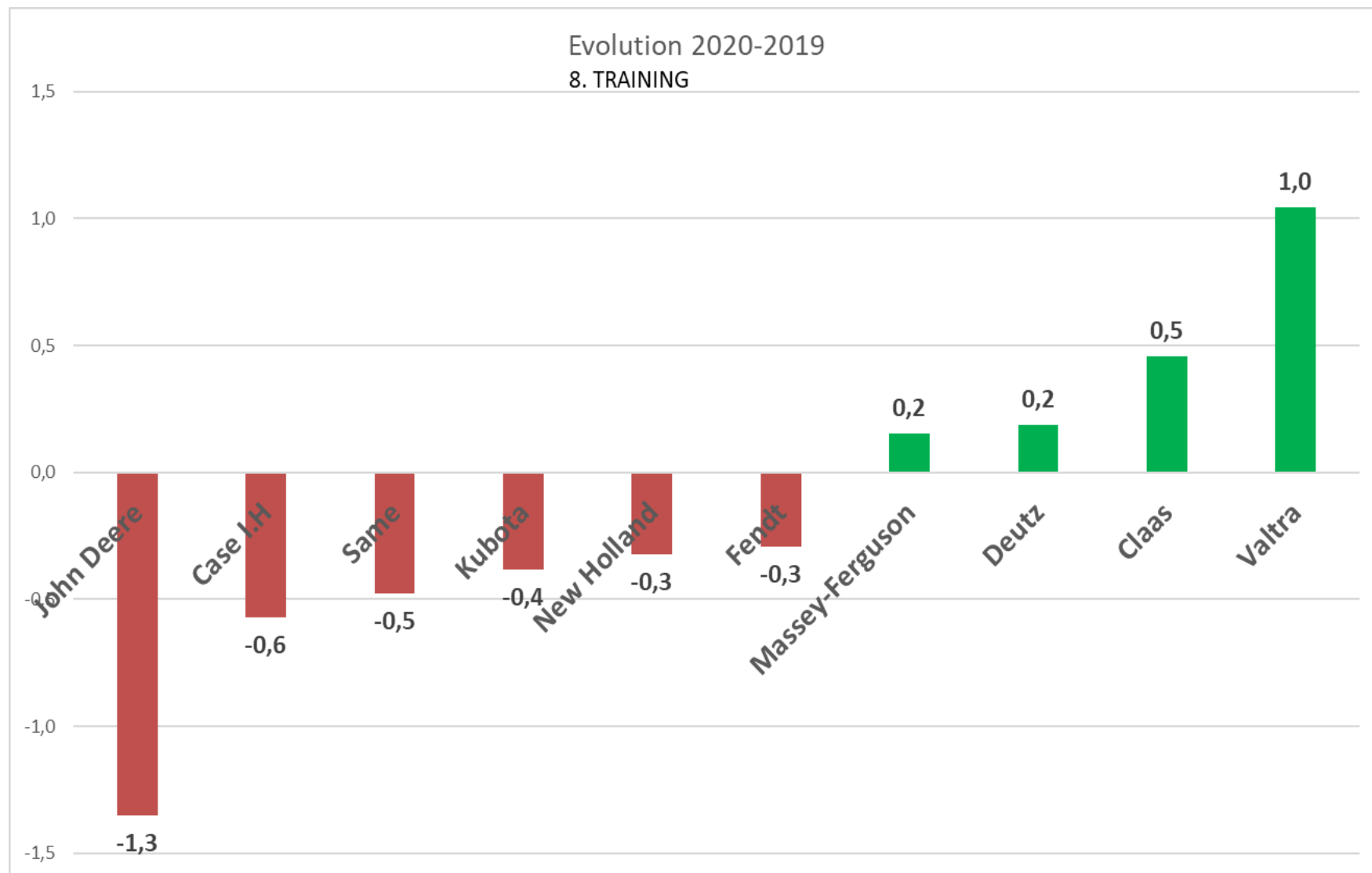


Average figure

2019



2020





# AVERAGE FOR MANUFACTURER-DEALER RELATIONS

Trend: 2020 > 2019

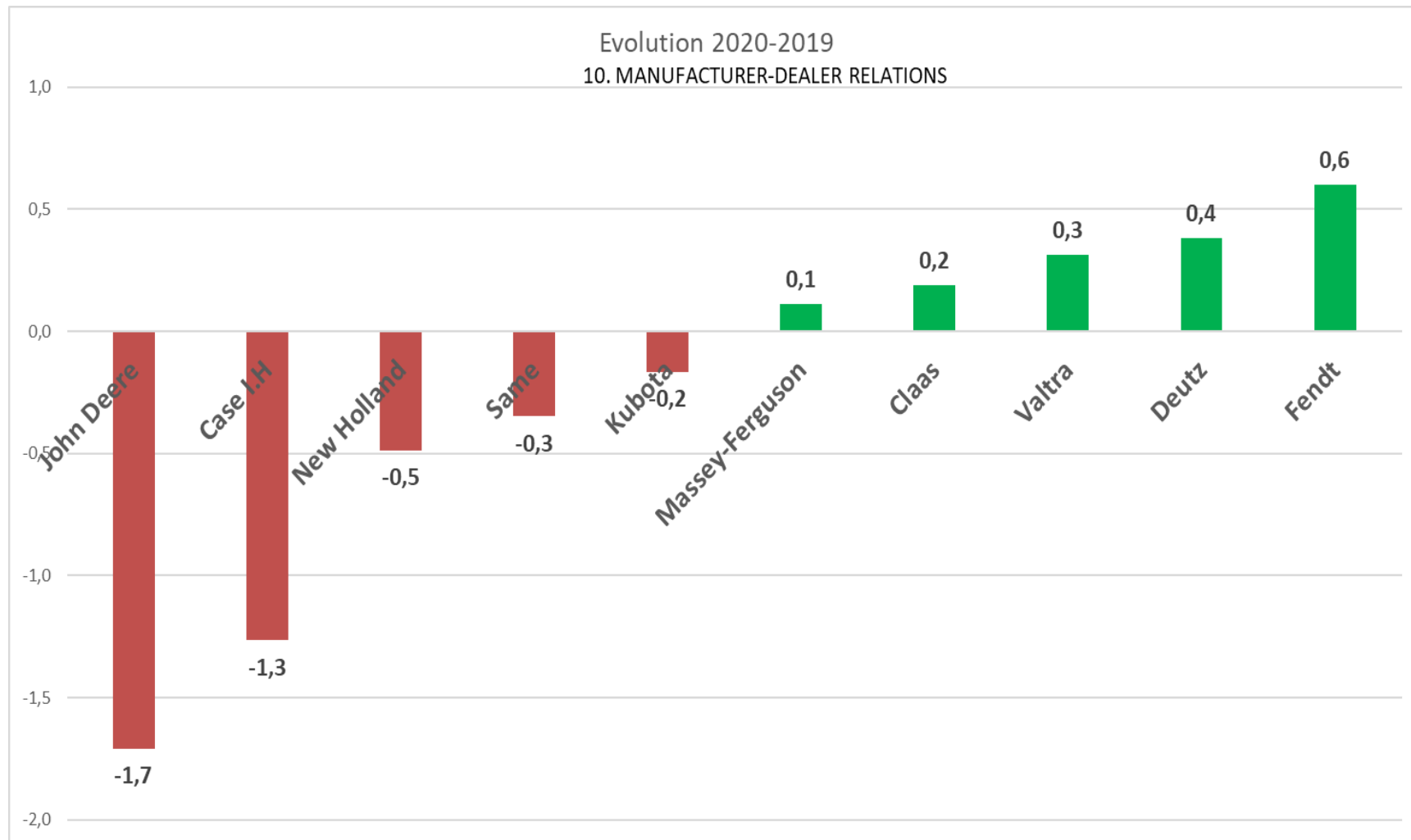


Average figure

2019



2020





# AVERAGE FOR PROFITABILITY CONTRIBUTION

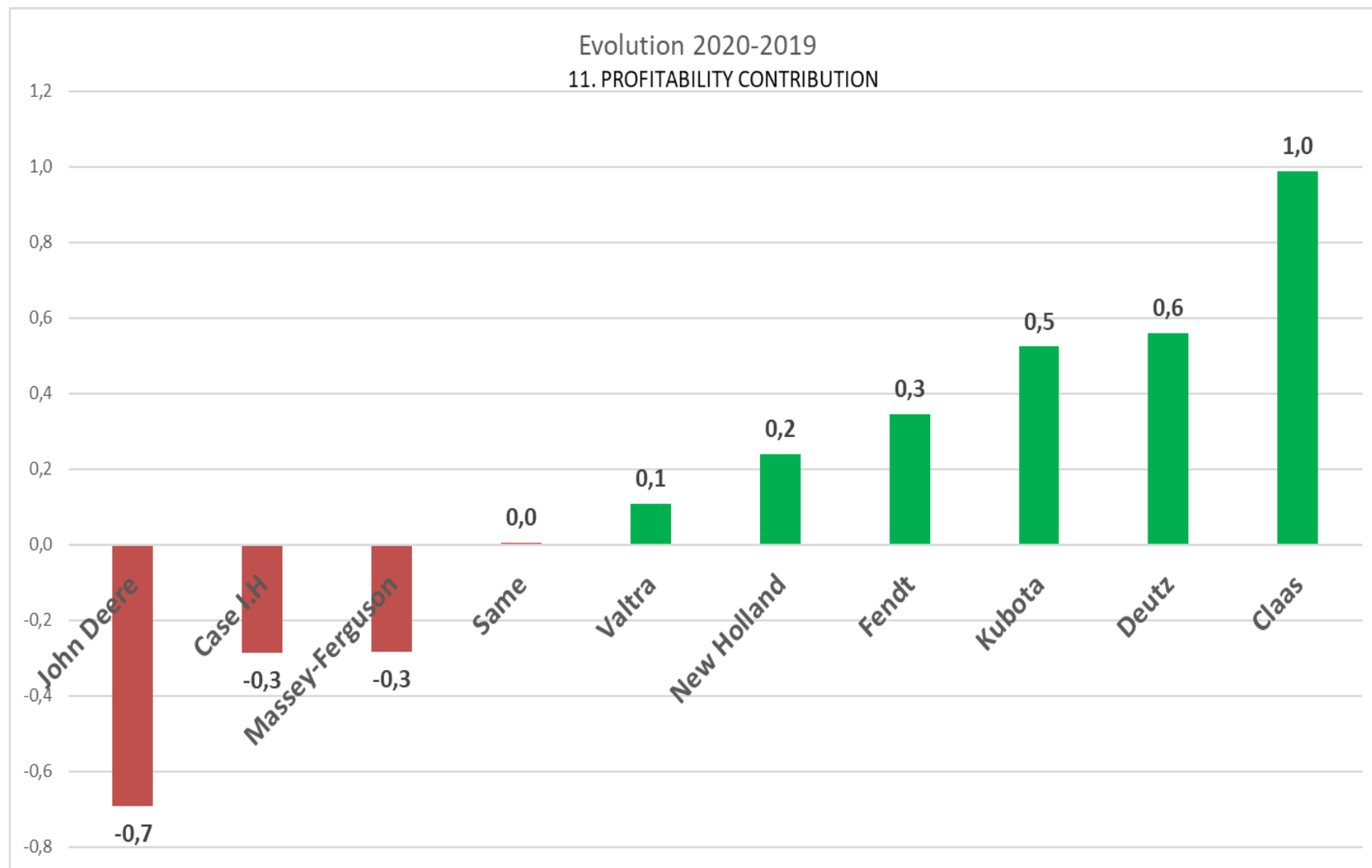
Trend: 2020 > 2019



Average figure

2019

2020





# AVERAGE FOR IMPROVEMENTS

Trend: 2020 > 2019



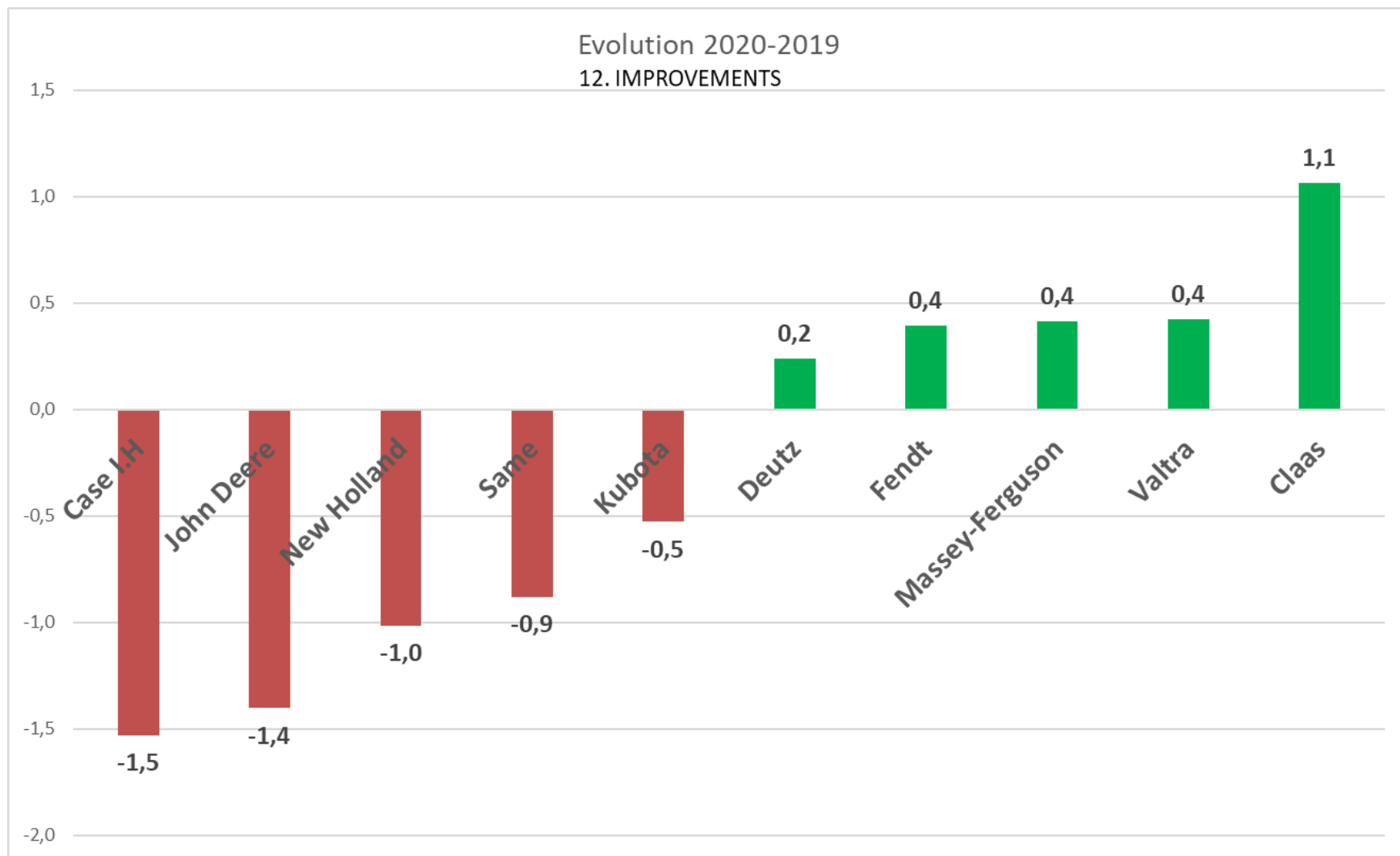
Average figure

2019

12,5

2020

12,3





# AVERAGE FOR THEFT PROTECTION

Trend: 2020 > 2019

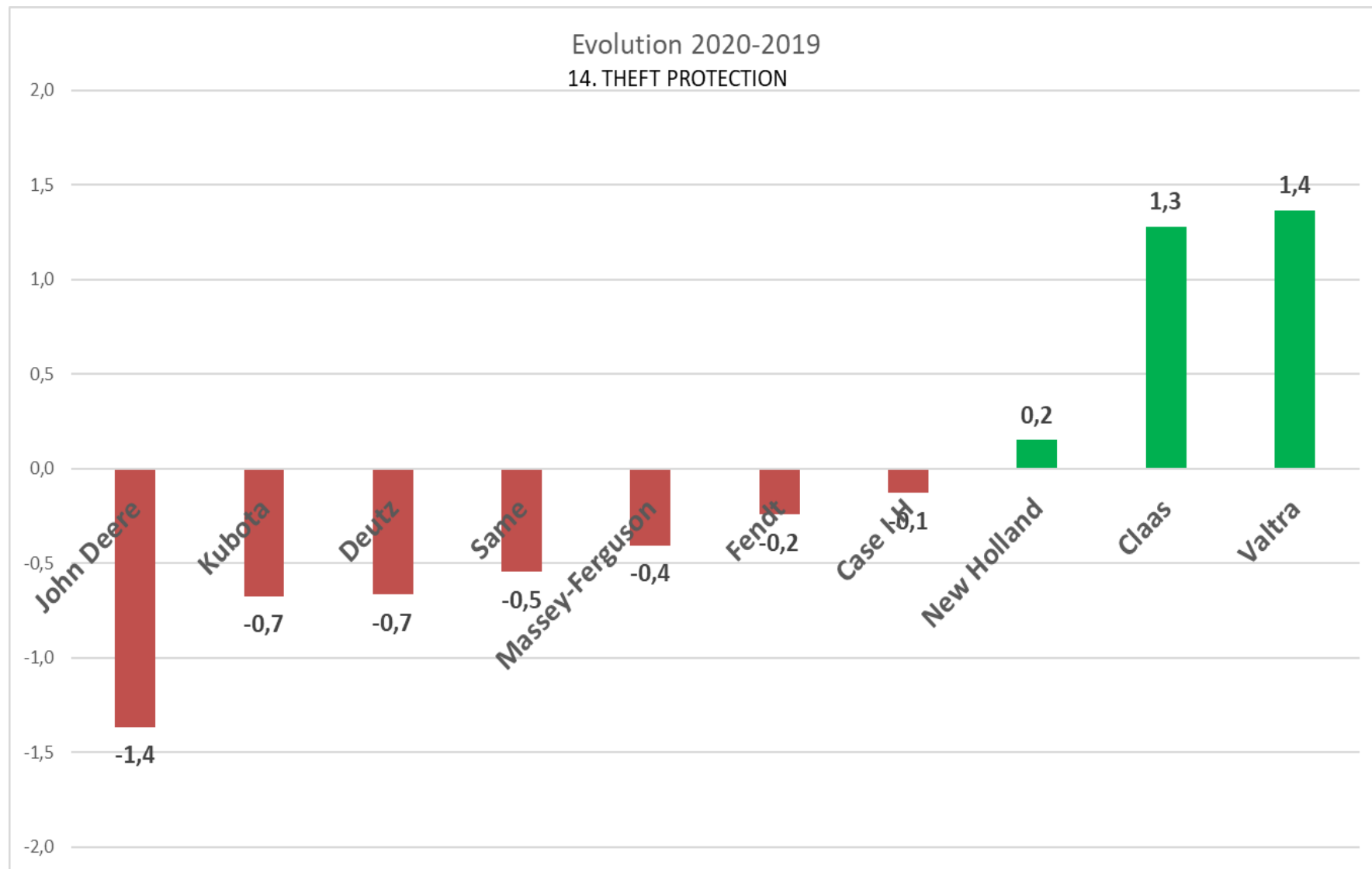
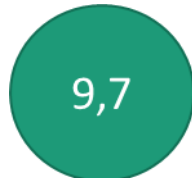


Average figure

2019



2020



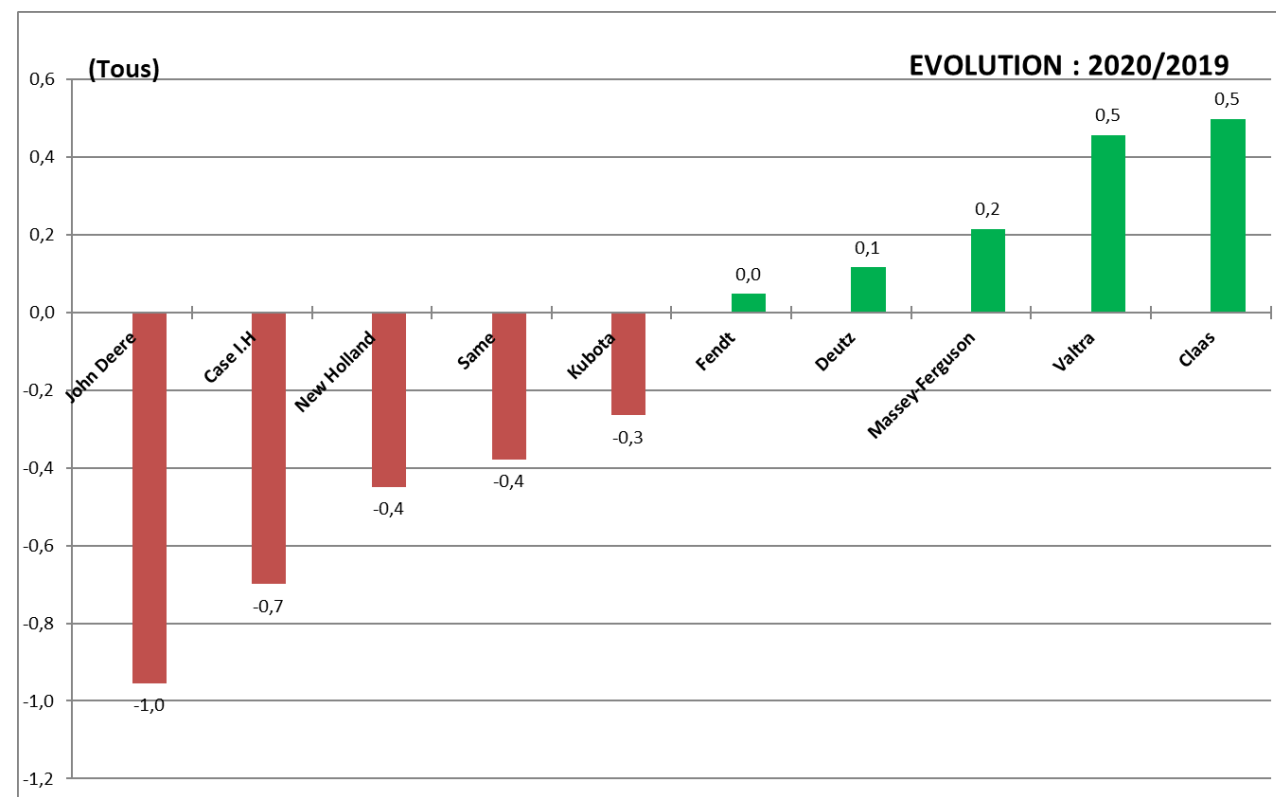
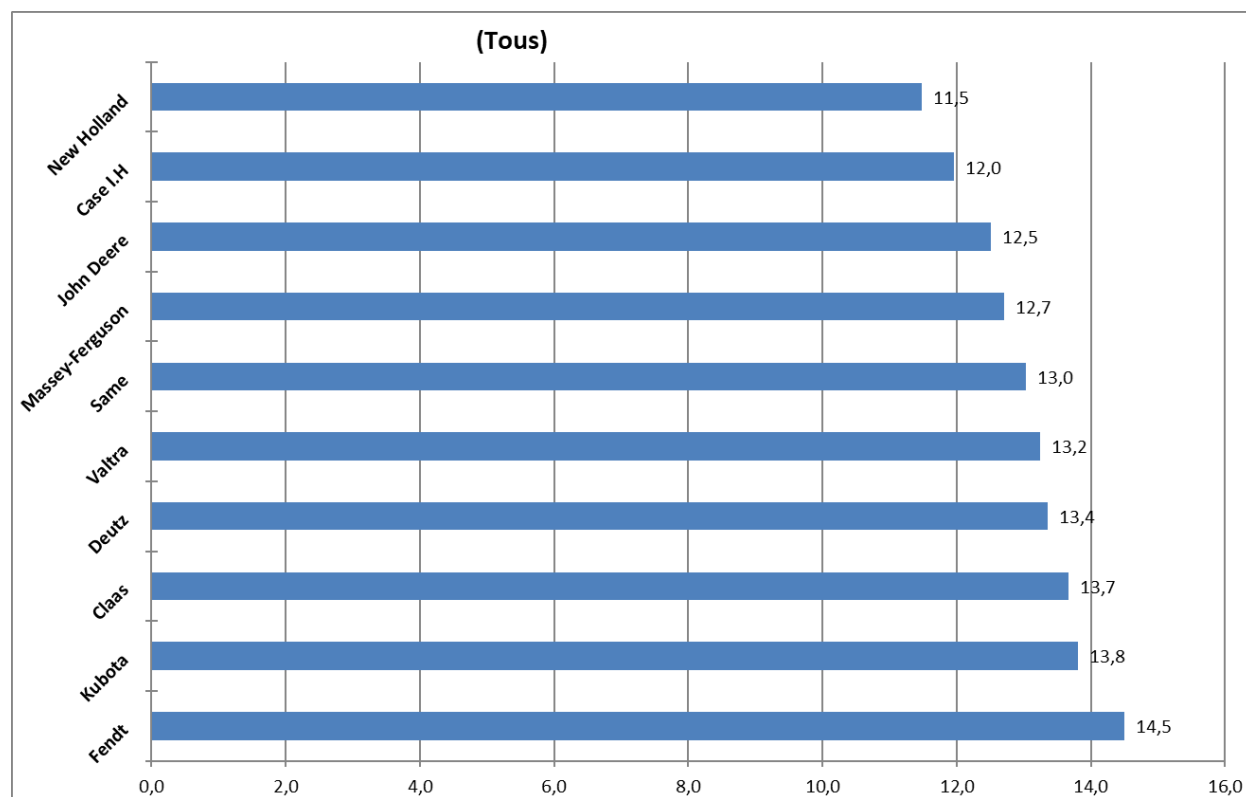


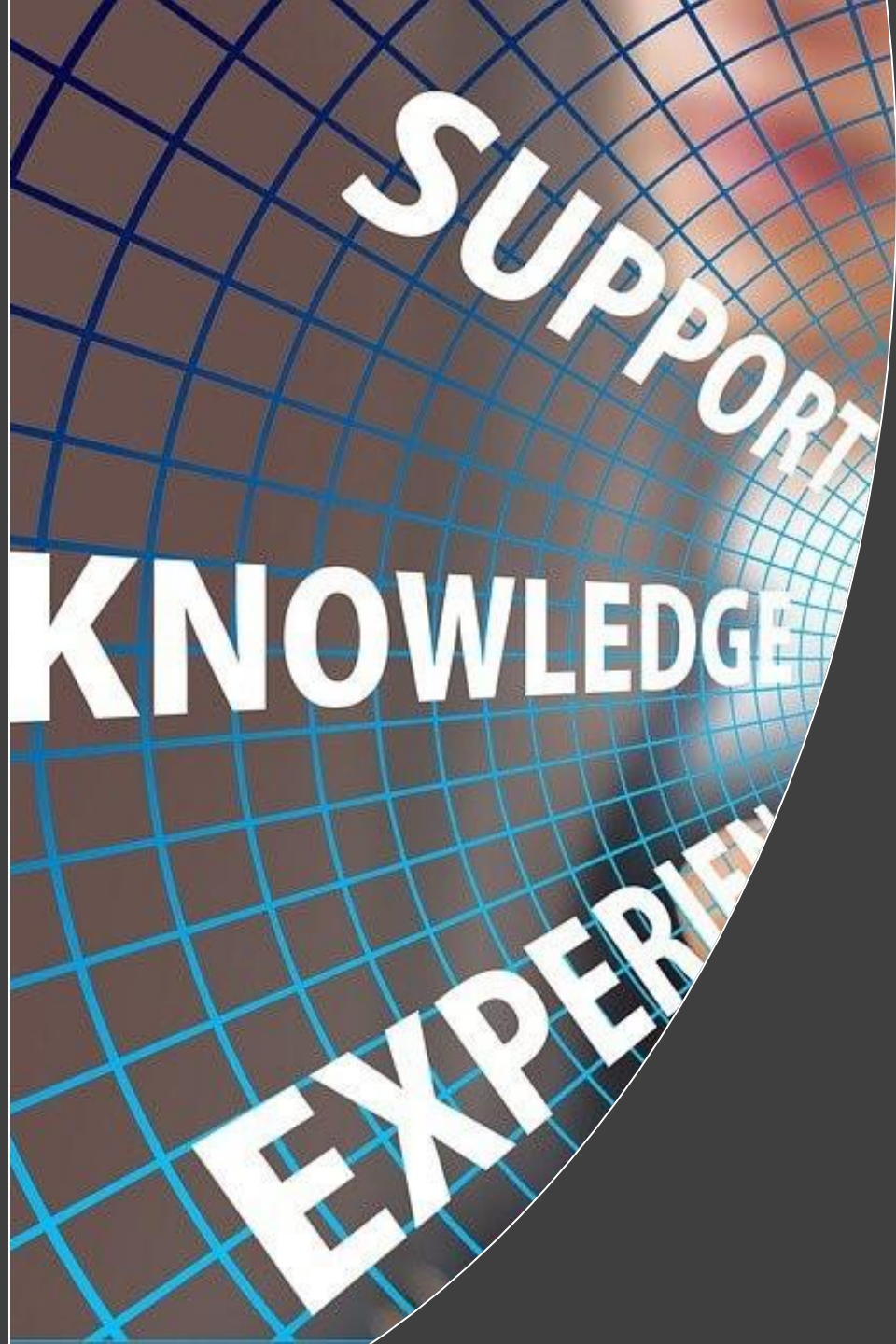
# OVERALL AVERAGE FOR EACH BRAND

Average figure



Trend: 2020 > 2019





CONCLUSION





# Lobby activities of CLIMMAR



## **CLIMMAR is active in several lobby files for which we have our own Technical Expert who does the lobby work for CLIMMAR**

### **Active in ISO Working Group**

- Repair and Maintenance Information (RMI)
  - Part 1 > a standardized communication protocol > approved
  - Part 2 > regarding the On Board Diagnostics (OBD) > still pending

### **Active in EU Working Group on Agricultural Tractors (WGAT)**

- Type approval issues of Non Road Mobile Machinery (NRMM)
- 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 is actively addressing relevant issues and topics to the policymakers in Brussels, often together with other relevant stakeholders



**copa\*cogeca**  **animalhealth europe**  **CEETAR**  **CEJA** 

**CEMA**  **European Crop Protection**  **EFFAB**  **Euroseeds** 

**FEFAC**  **fertilizers europe**  **CLIMMAR**  **Centre de Liaison International des Marchands de Machines Agricoles et des Réparateurs**

CC(20)4603:1 – DA/lb

Juan Ignacio ZOIDO ÁLVAREZ  
Committee on Agriculture and Rural Development  
European Parliament  
Brussels,  
Belgium

Brussels, 1st July 2020

Honourable Member of the European Parliament,

We are writing to you to present the **EU Code of Conduct on Agricultural Data Sharing, in the framework of the European strategy for data discussion.**

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

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

