




Press- Conference



AGRITECHNICA, 13th November 2023

Agenda

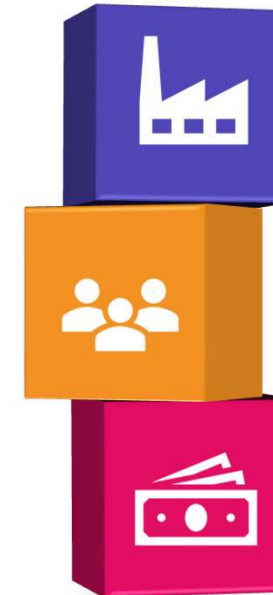
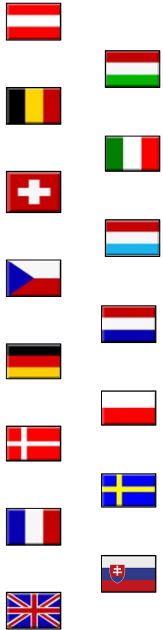
-  Branch key-data
-  Dealer Satisfaction Index (tractor brands)
-  Trends in the sector



Branch key-data

Ag-dealers and service-companies are an important player in rural area all over Europe

Members of CLIMMAR: 15



Companies
15 657

Employees
185 200

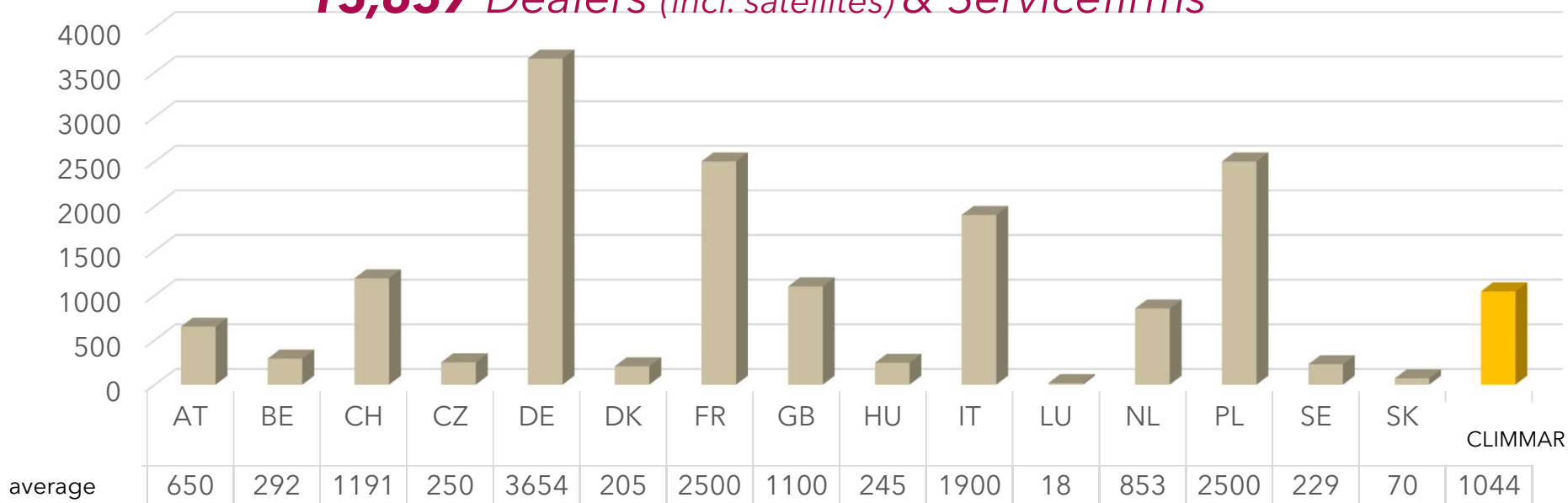
Turnover
51,900 Mrd. €



United in defending the interests of distribution in the face of increasingly European and even global decisions

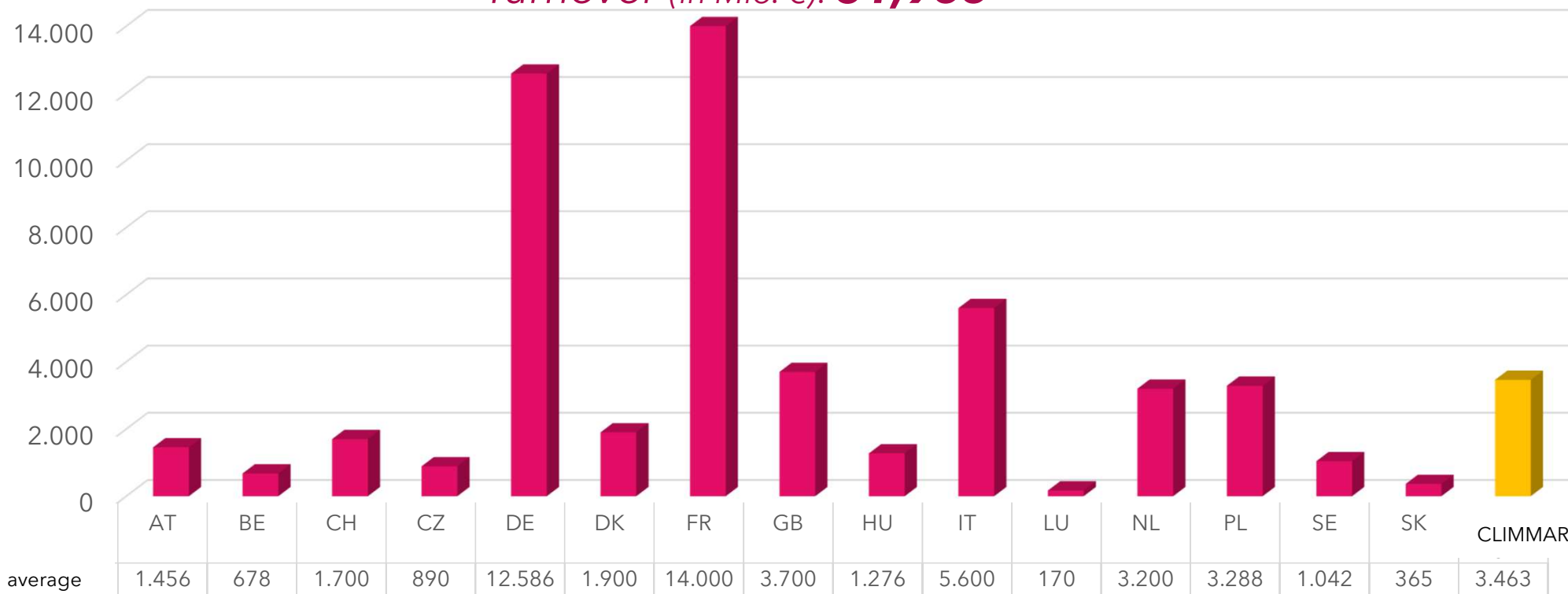
Number of companies per country in CLIMMAR-members

15,657 Dealers (incl. satellites) & Servicefirms



Turnover per country in CLIMMAR-members

Turnover (in Mio. €): **51,900**

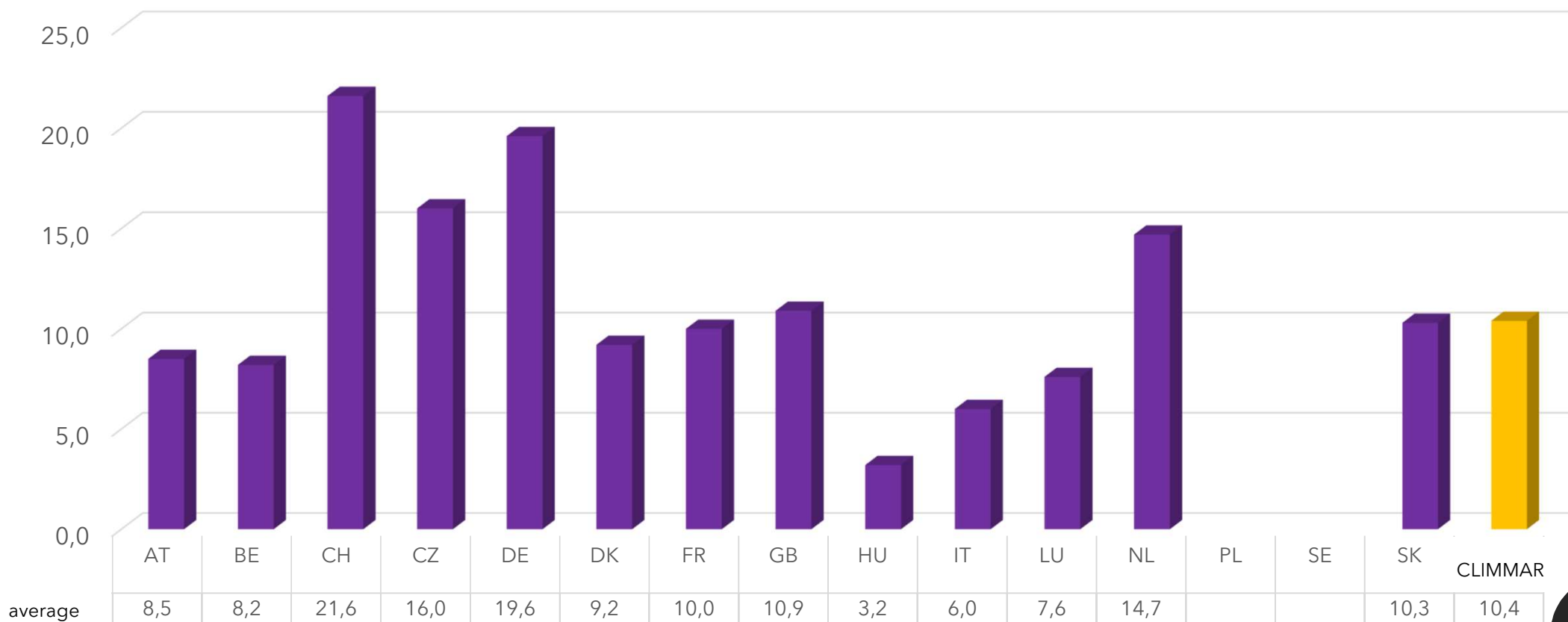


Employees per country in CLIMMAR-members



Apprentices per country in CLIMMAR-members

Relations - % Apprentices (of Employees): **10.4**

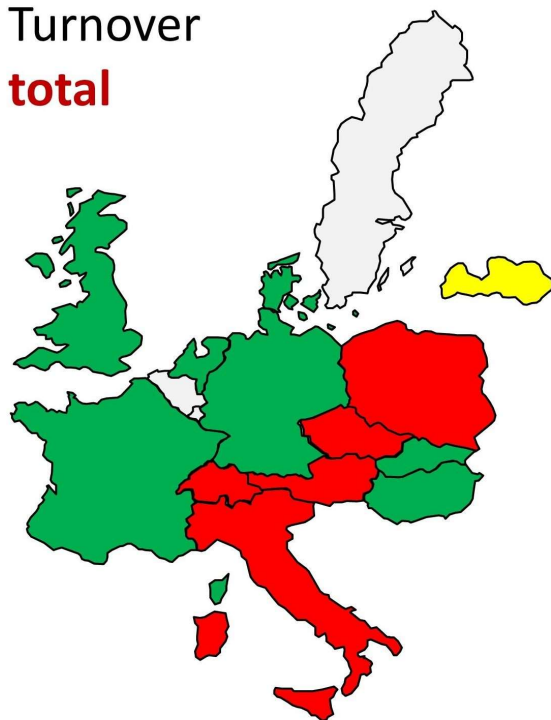


Source: CLIMMAR

Development of turnover in first half 2023

(compared with the same period one year before)

Turnover
total



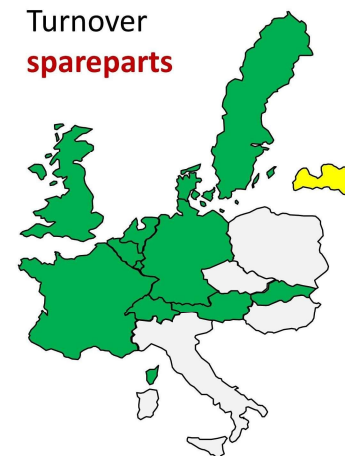
Turnover
new equipment



Turnover
workshop



Turnover
spareparts



■ increased	■ decreased
■ stable	■ no response





Turnover-development and -expectations

Development of turnover in the first half of 2023



Expectations of turnover for next half of 2023



-  decrease
-  equal
-  increase
-  no answer

Development and expectations

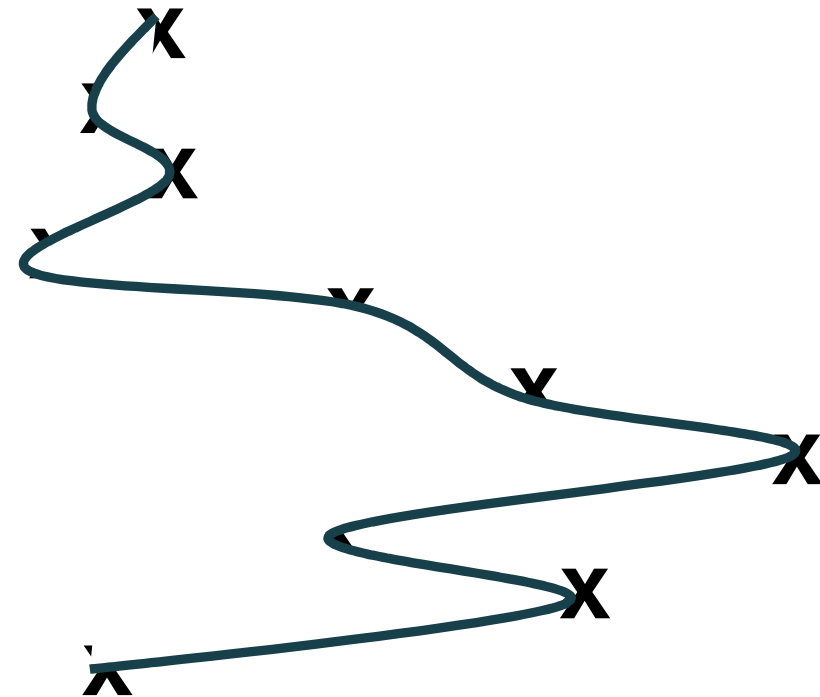
Comparison to same period last year: **January - June 2023**

- (minus / worse)

= (equal)

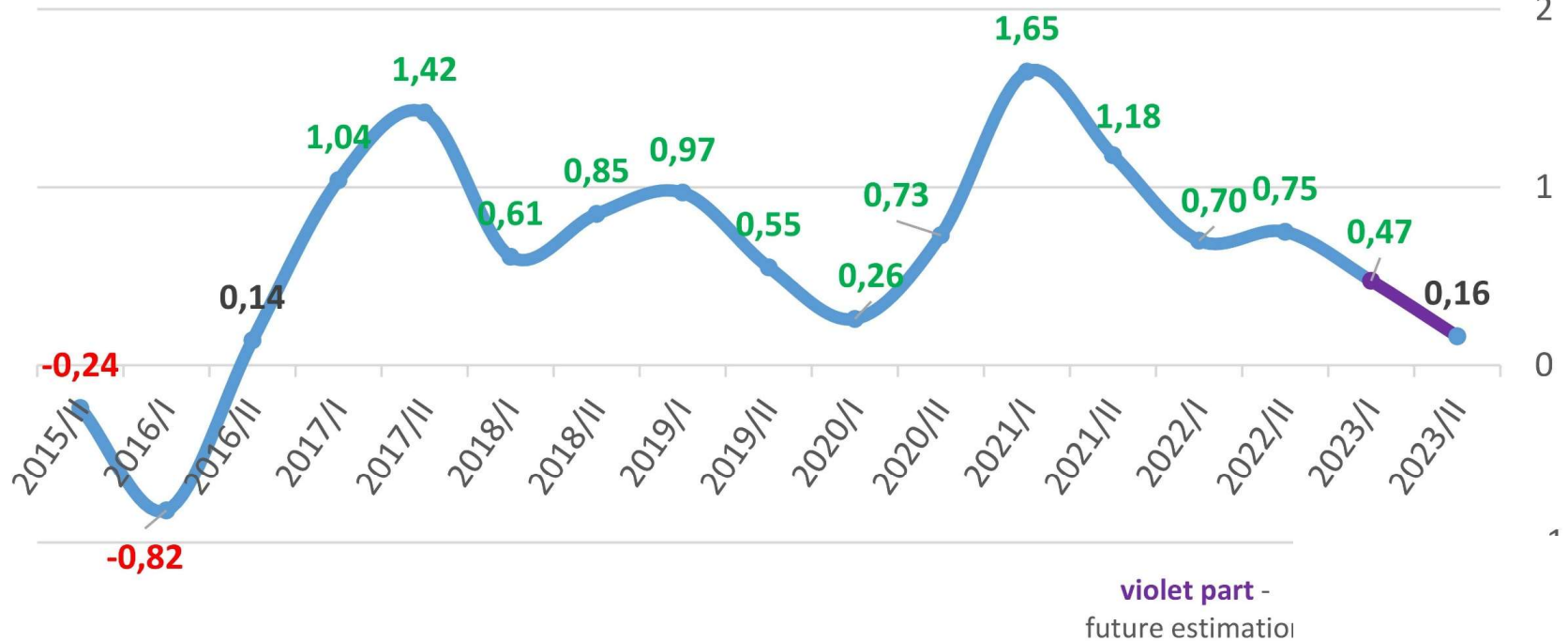
+ (plus / better)

- A. Turnover total
 - A.I Turnover Machinery
 - A.I.1 New machinery
 - A.I.2 Second hand
 - A.II Turnover Workshop
 - A.III Turnover Spare Parts
- B. Costs
- C. Employees
- E. Stock
- F. Investments



CLIMMAR-Index:

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



3

2

1

0

-1

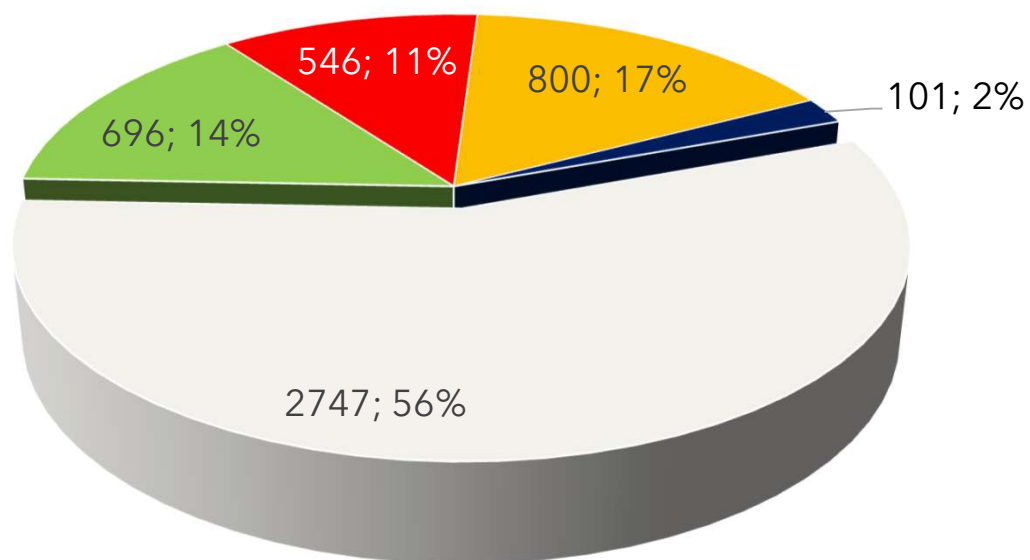
-2

-3

Turnover-structure of an average dealers-company in Europe

turnover-structure

of the average CLIMMAR-dealer
(1,000 € ; % of turnover total)



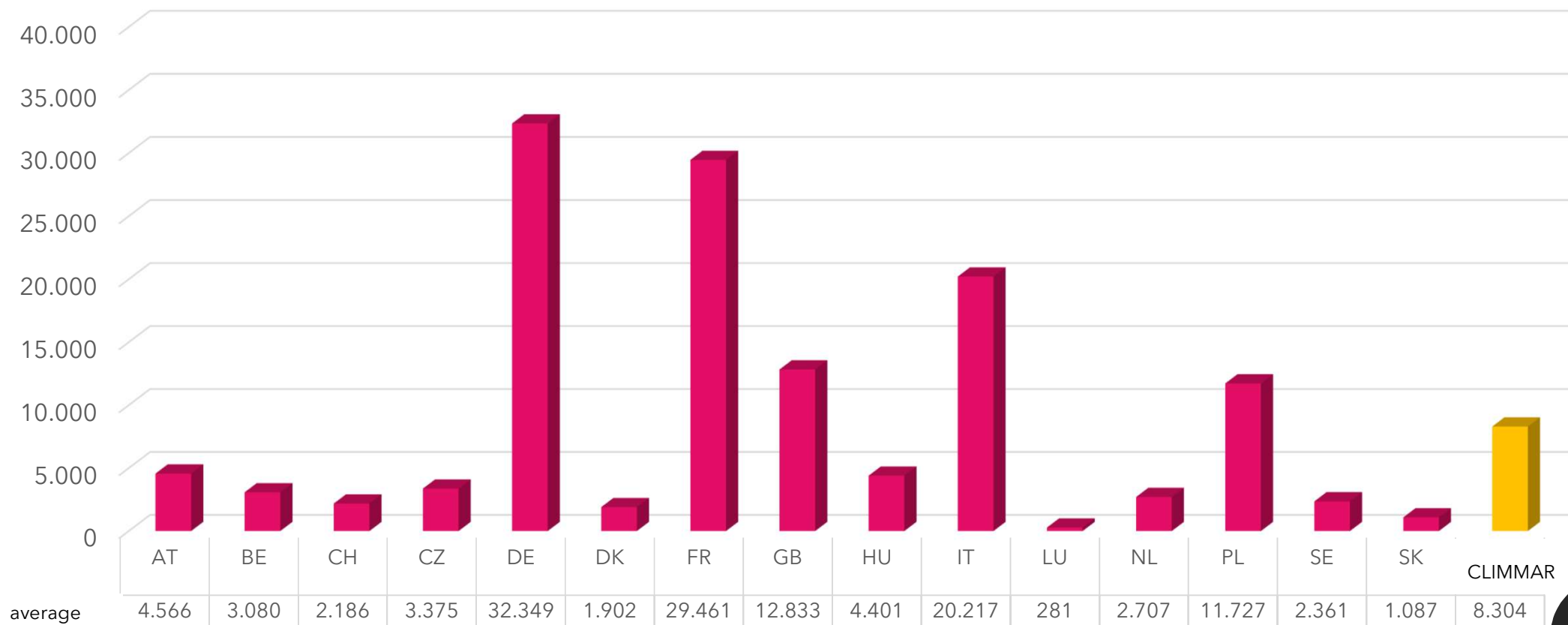
■ new equipm. ■ second hand ■ workshop ■ parts ■ externals

total:
4,889,000 €/comp.

Source: CLIMMAR

Immatriculation of tractors per country in CLIMMAR

Tractor Sales: **132,500** units



Source: CLIMMAR



Dealer Satisfaction Index 2023

AGRITECHNICA 13/11/2023

DSI 2023



Start : april 4TH 2023
End : May 31th 2023



11
countries
included

2 more :
Luxembourg and Sweden

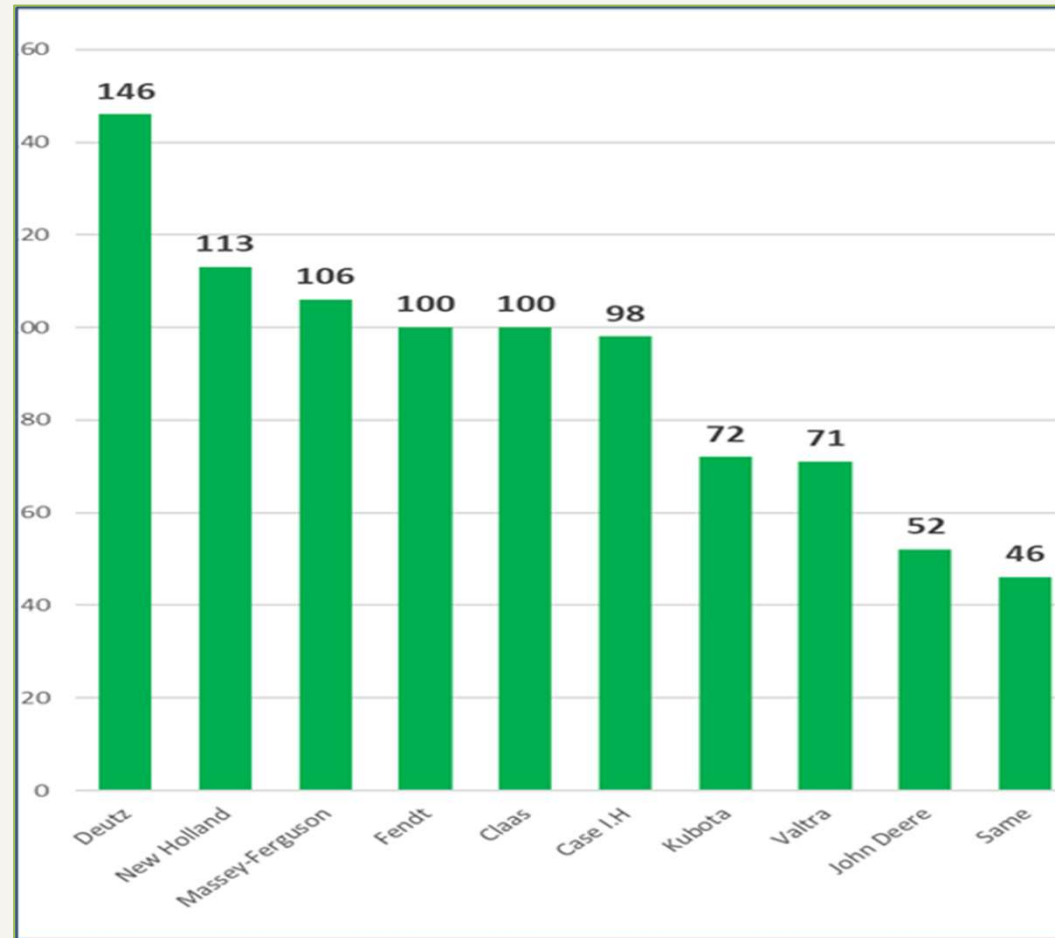
Survey addresses per country



Country	Adressed 2023	Adressed 2022	2022/2021	
France	450	453	-1 %	↓
Poland	116	125	-7 %	↓
Belgium	234	331	-29 %	↓
Italia	1484	1484		=
United Kingdom	360	393	-8 %	↓
Germany	642	654	-2 %	↓
Hungary	33	50	-32 %	↓
Denmark	83	83		=
Netherlands	287	290		=
Luxembourg	10			
Sweden	62			
TOTAL	3761	3863	-2,5 %	↓

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Number of answers per brand



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Overall analysis



The gap between the brand that obtained the highest overall average and the one that obtained the lowest was 4.1 in 2018. In 2023, the gap is only 1.6.



All the European distributors who joined this survey pointed to the difficulties to obtain or keep financing for machines... furthermore, linked to higher interest rates.

*Result by
Brand*




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Legend : reading the diagram for each brand

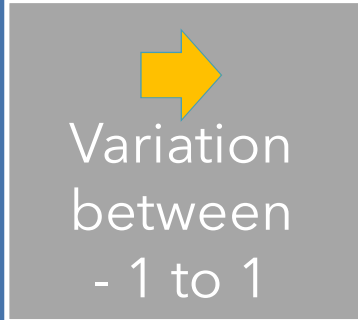
61 questions



Variation
< 1 point



Variation
≥ 1 point



Variation
between
- 1 to 1



10 answers and
more



10 answers and
more



Overall average all brands

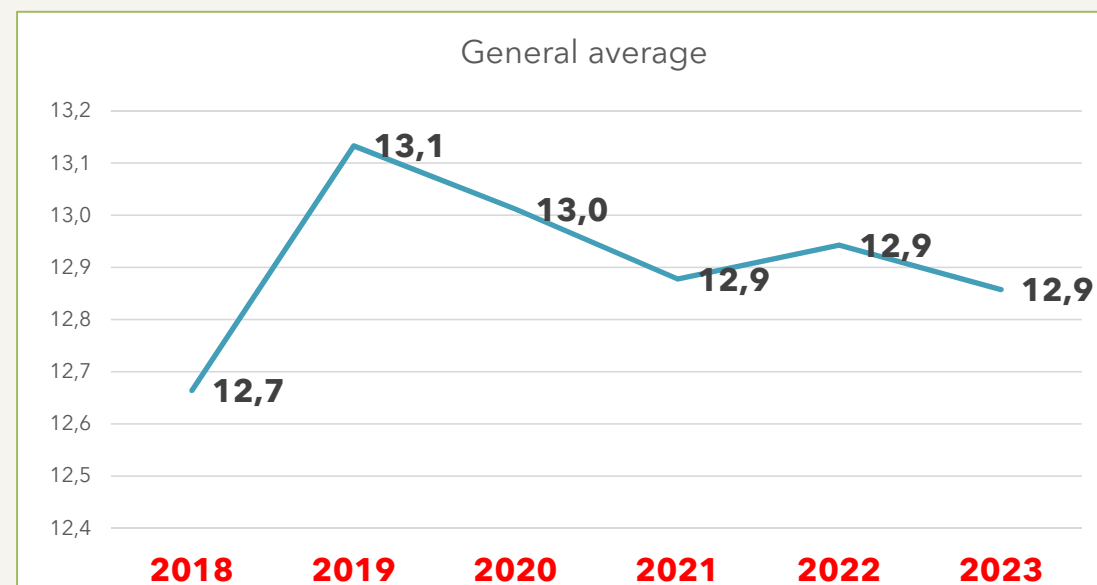


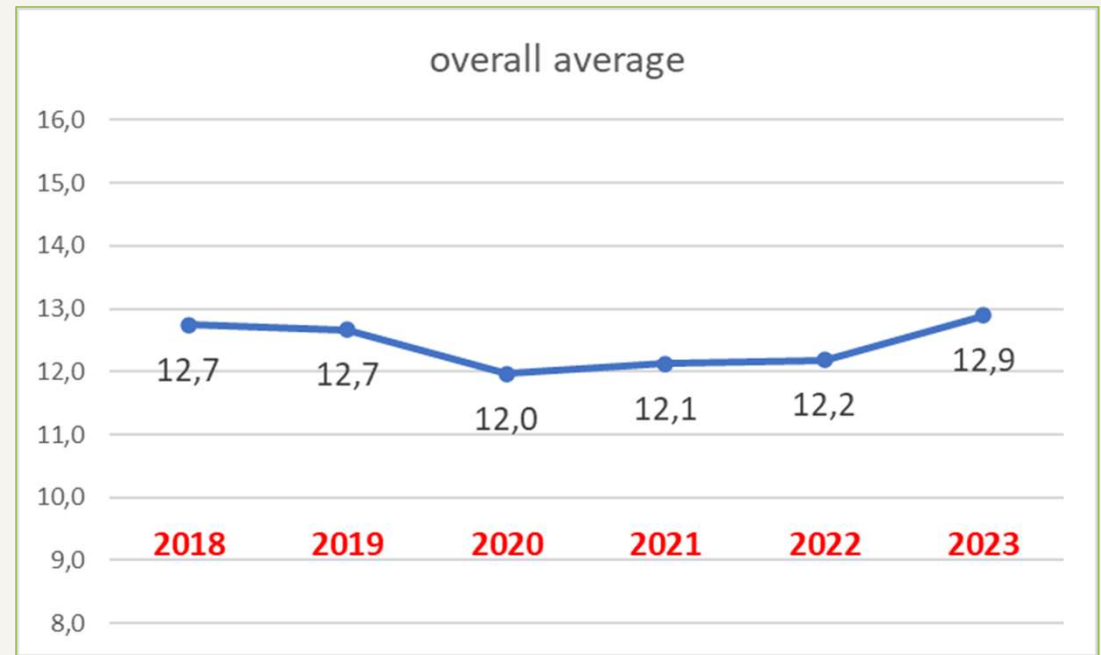
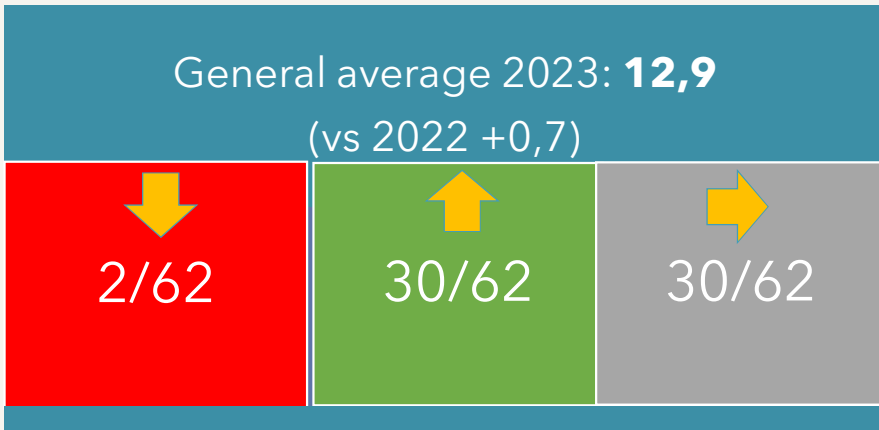


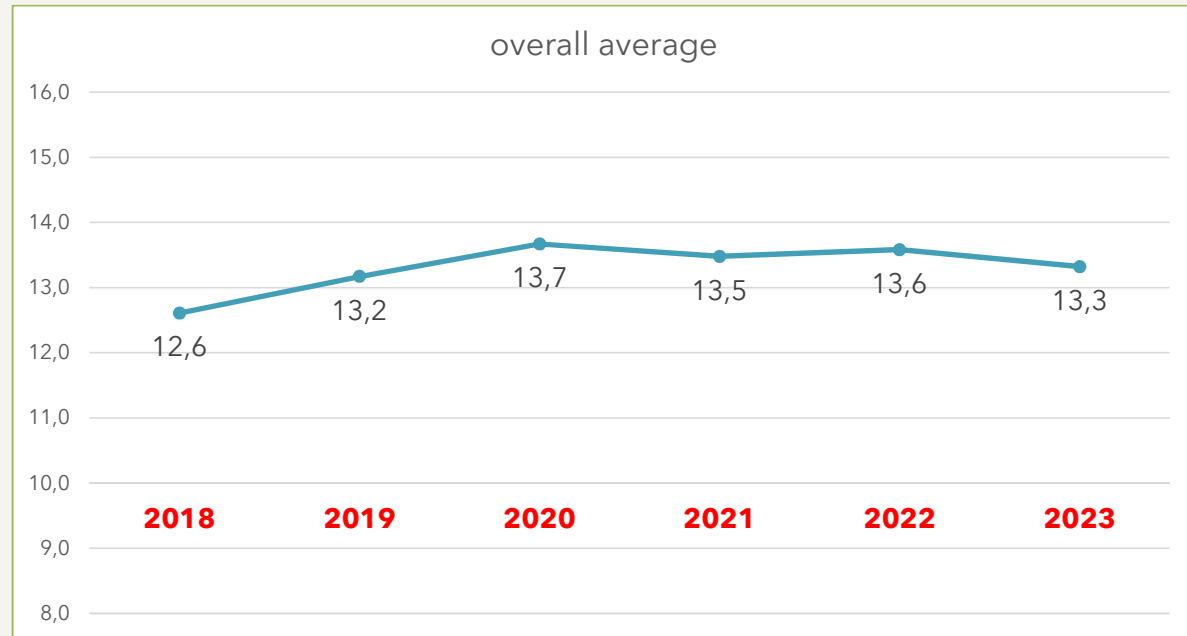
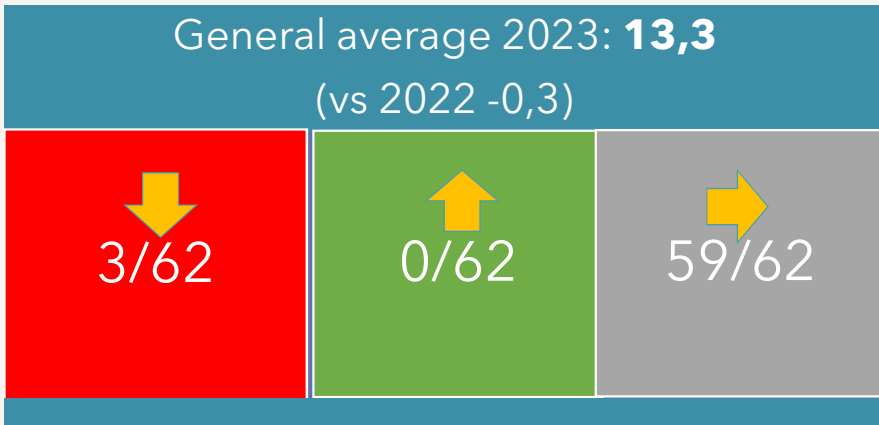
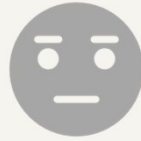




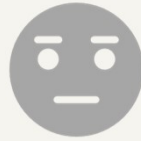








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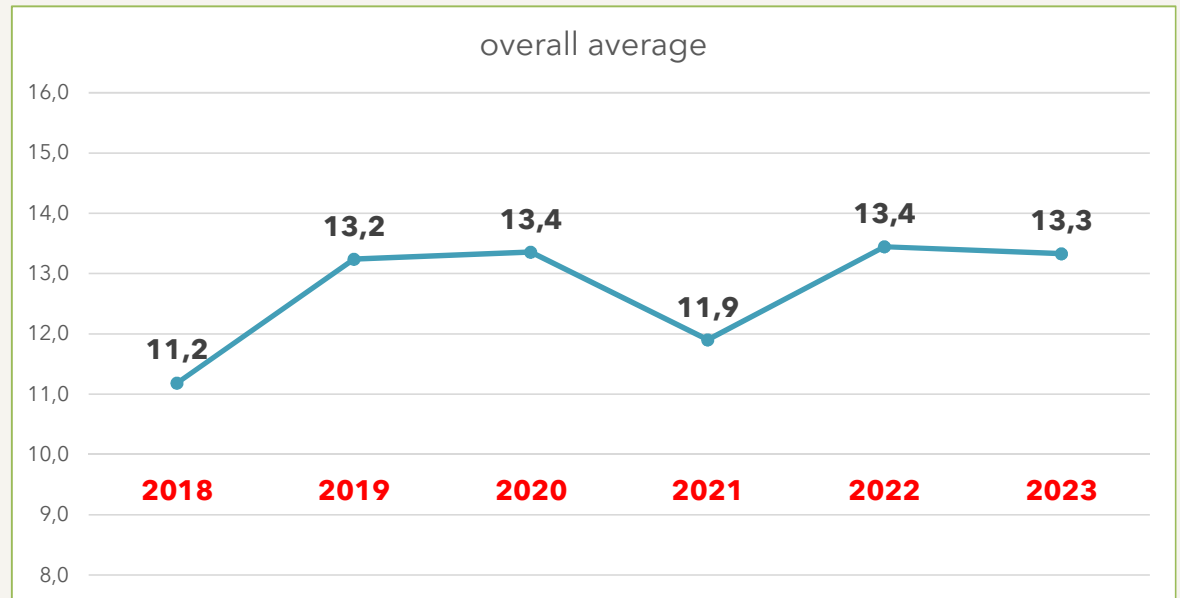


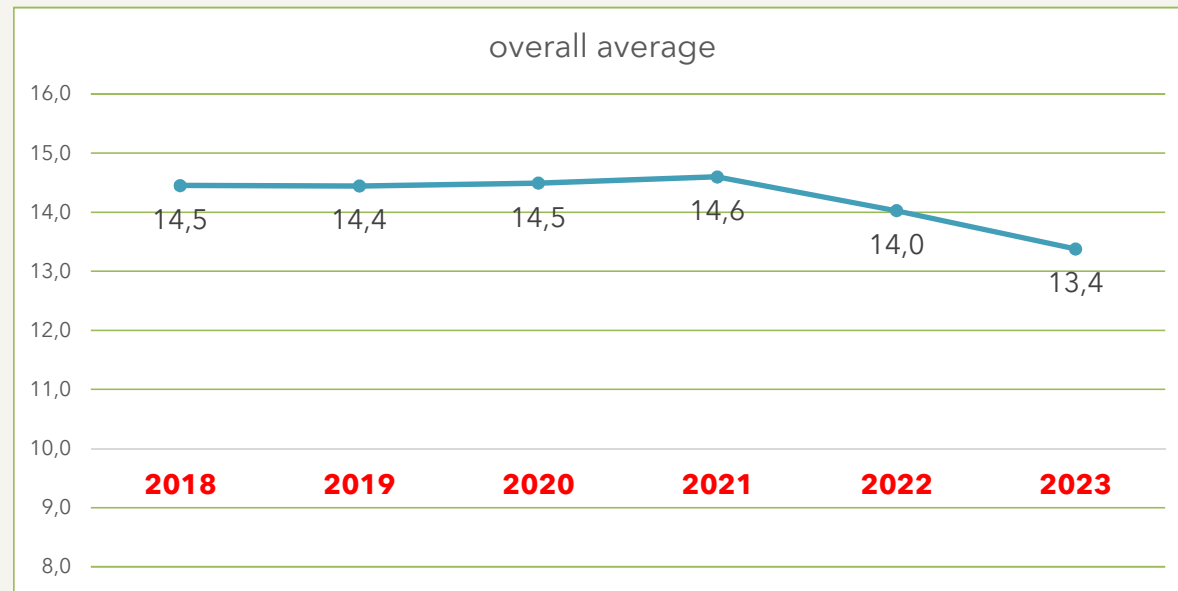
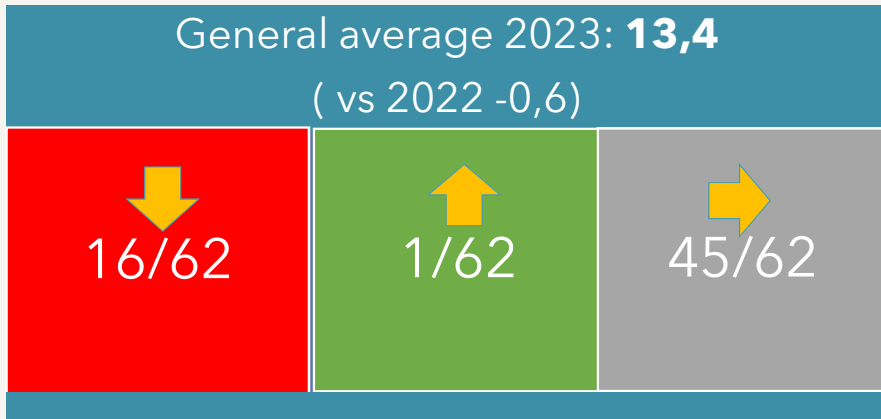
General average 2023: **13,3**
(vs 2022 -0,1)

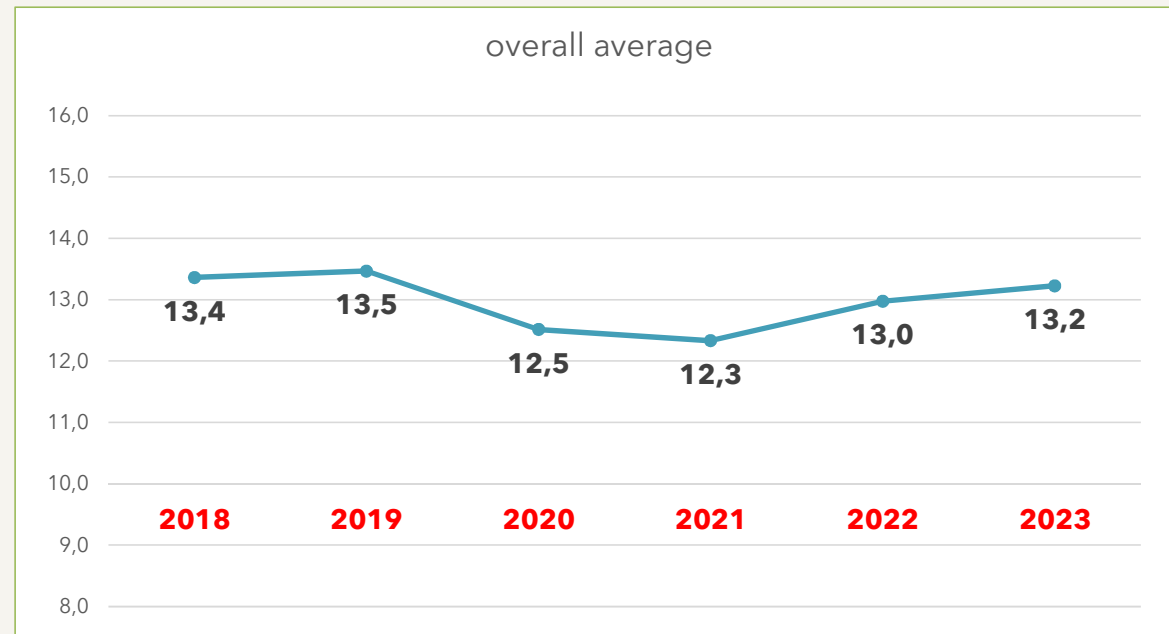
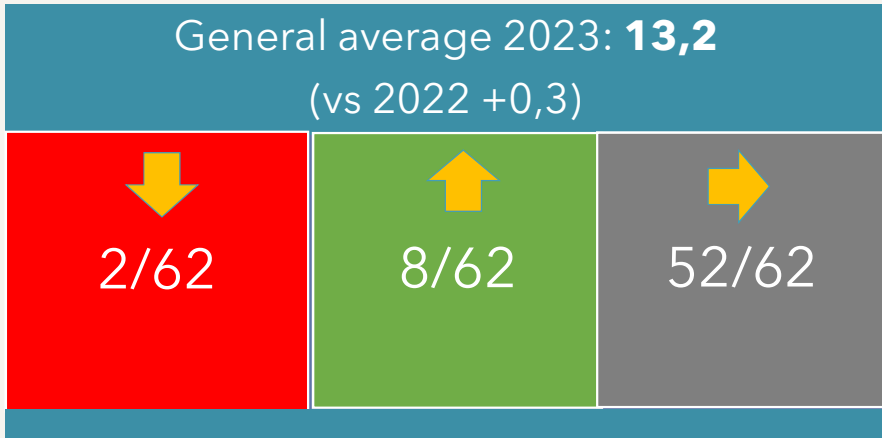
↓
0/62

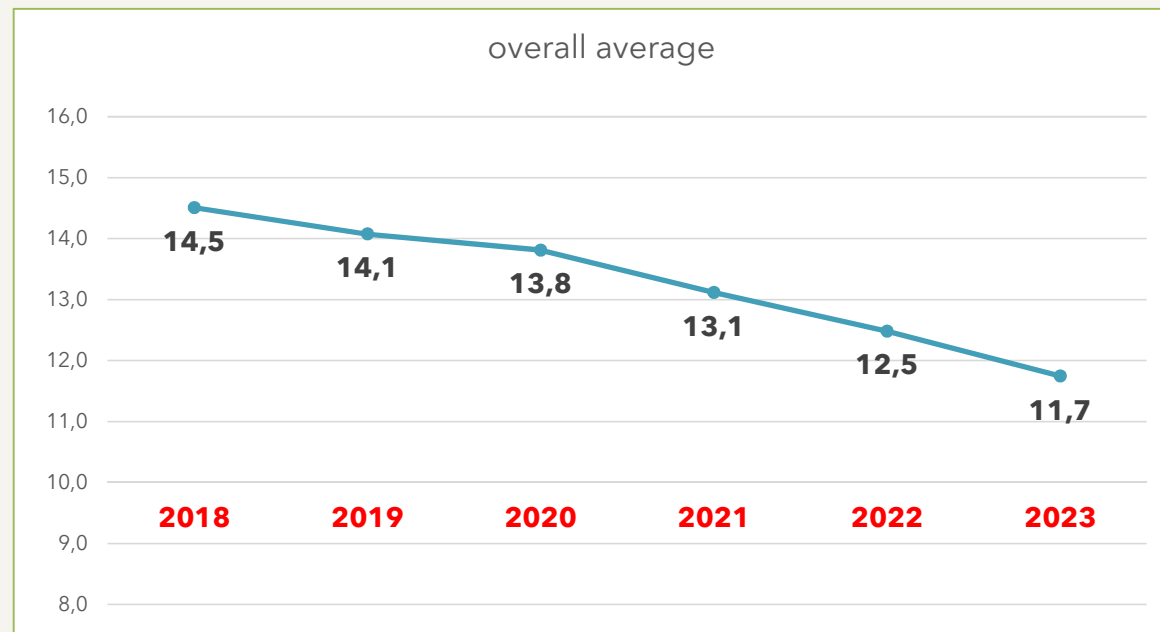
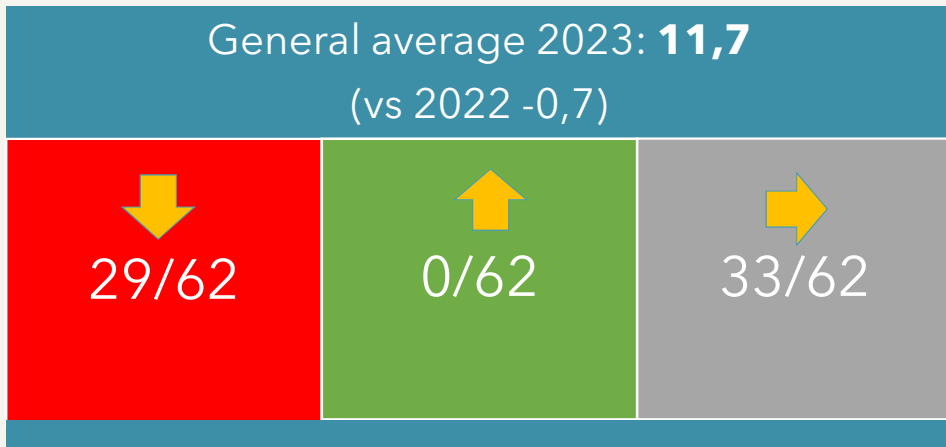
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2/62

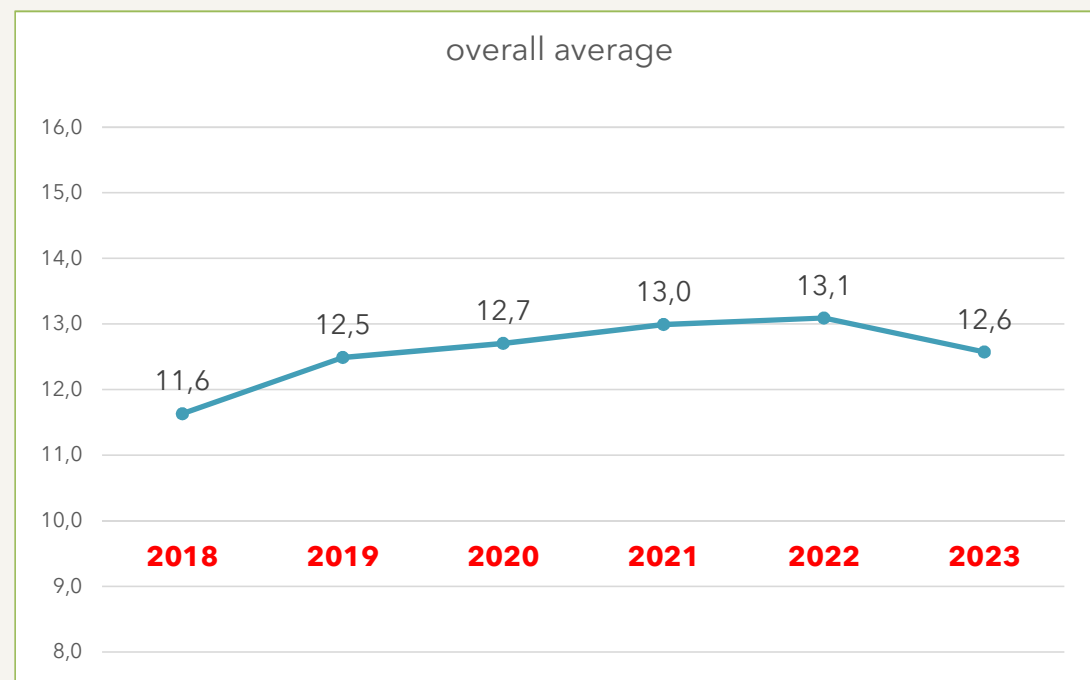
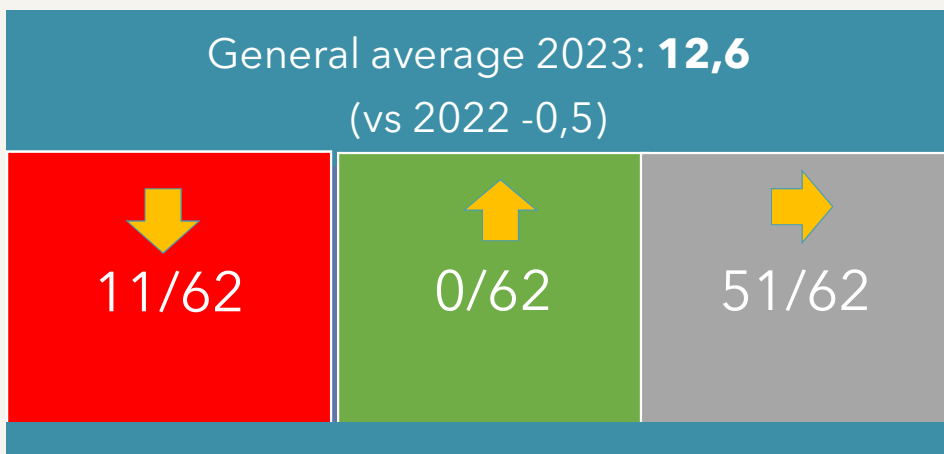
→
60/62

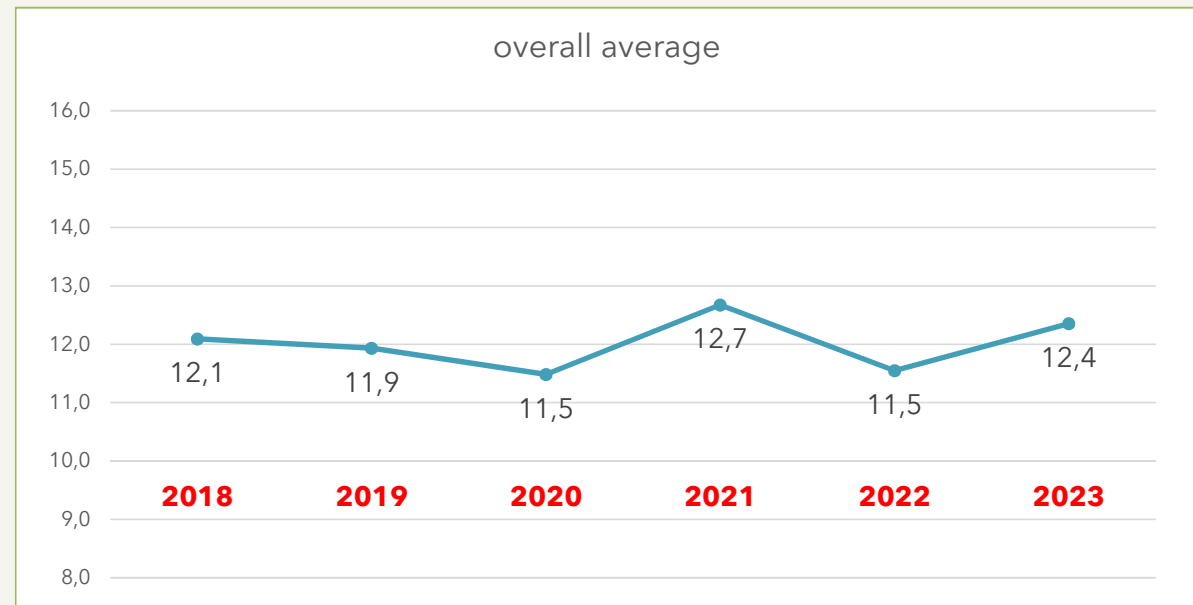
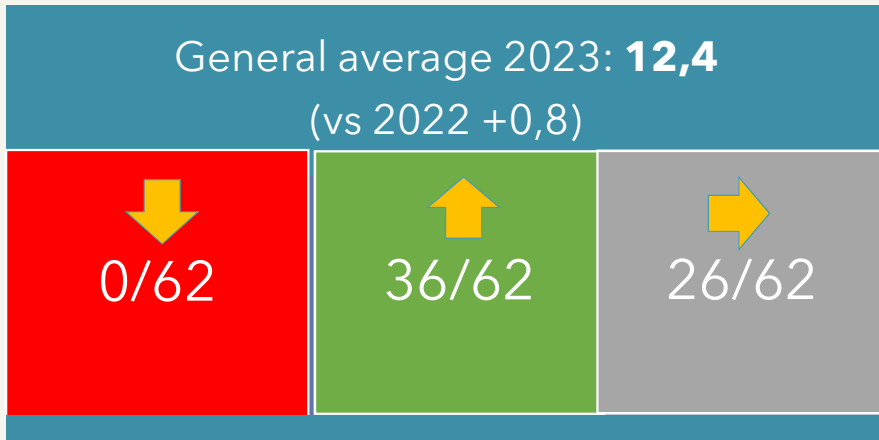


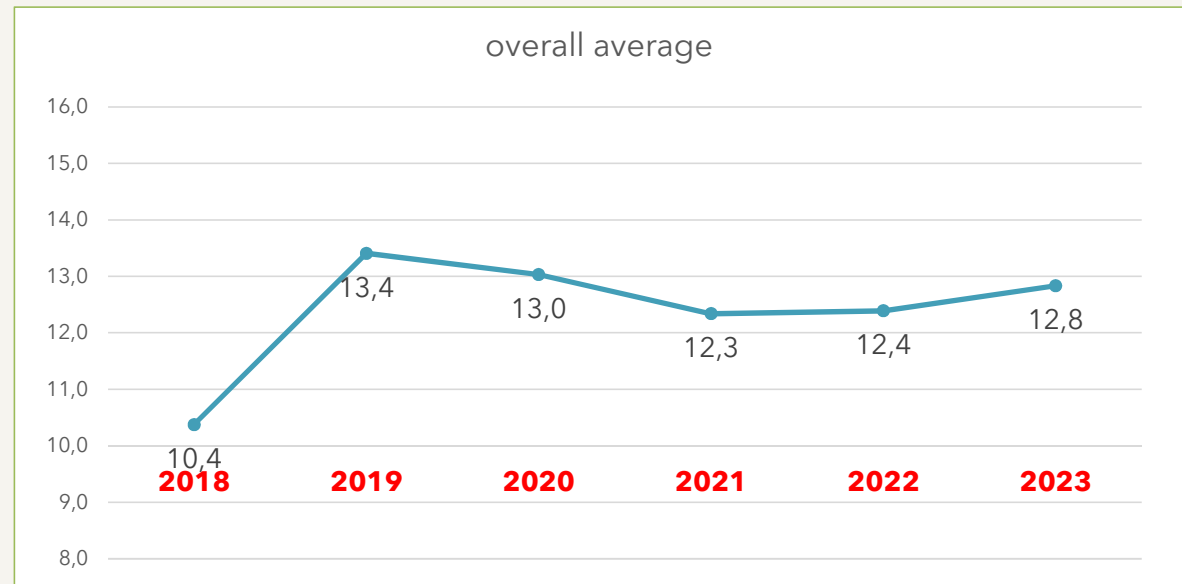
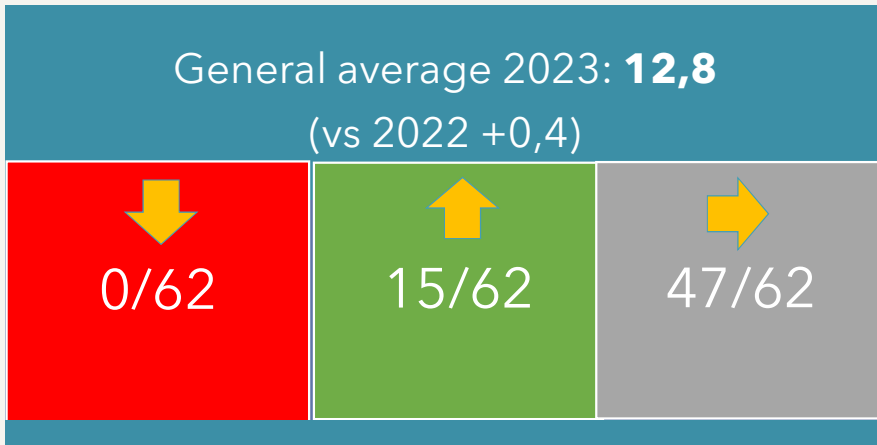


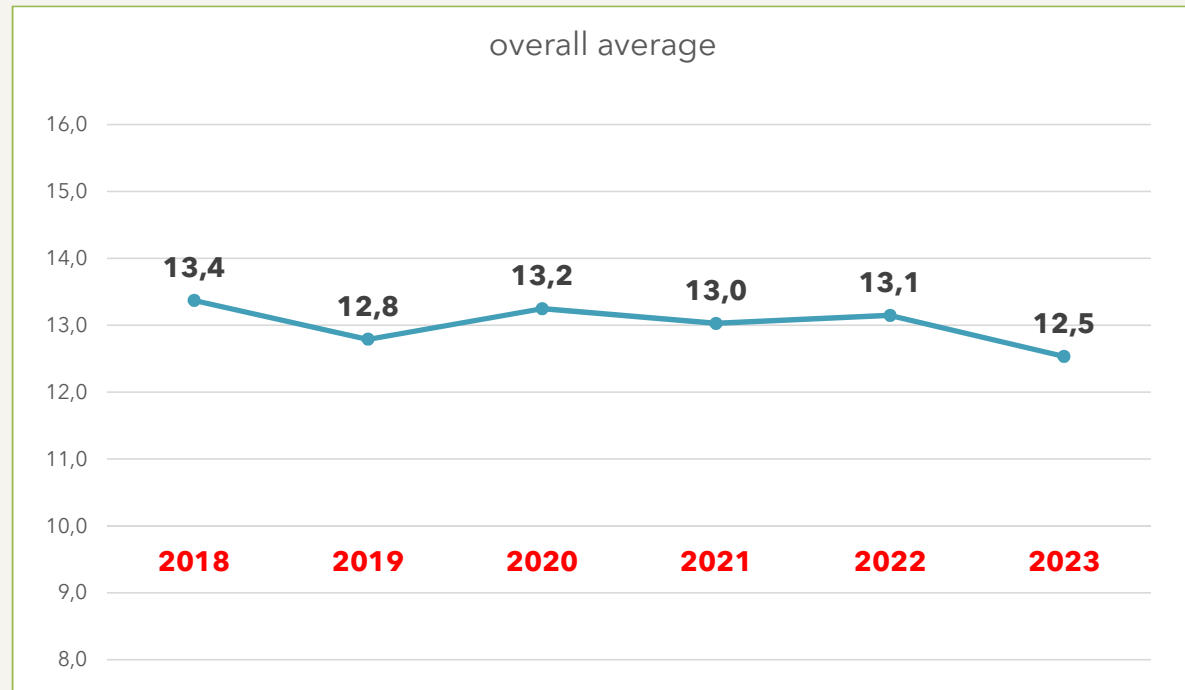
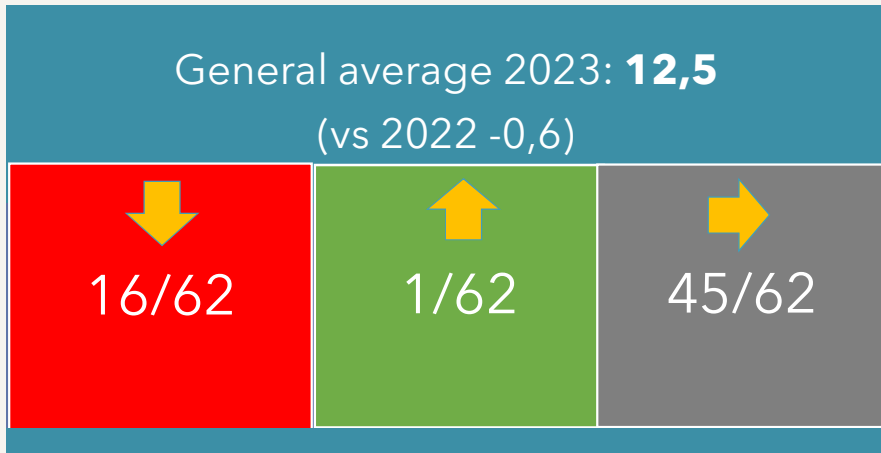
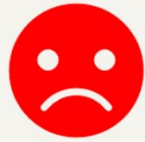










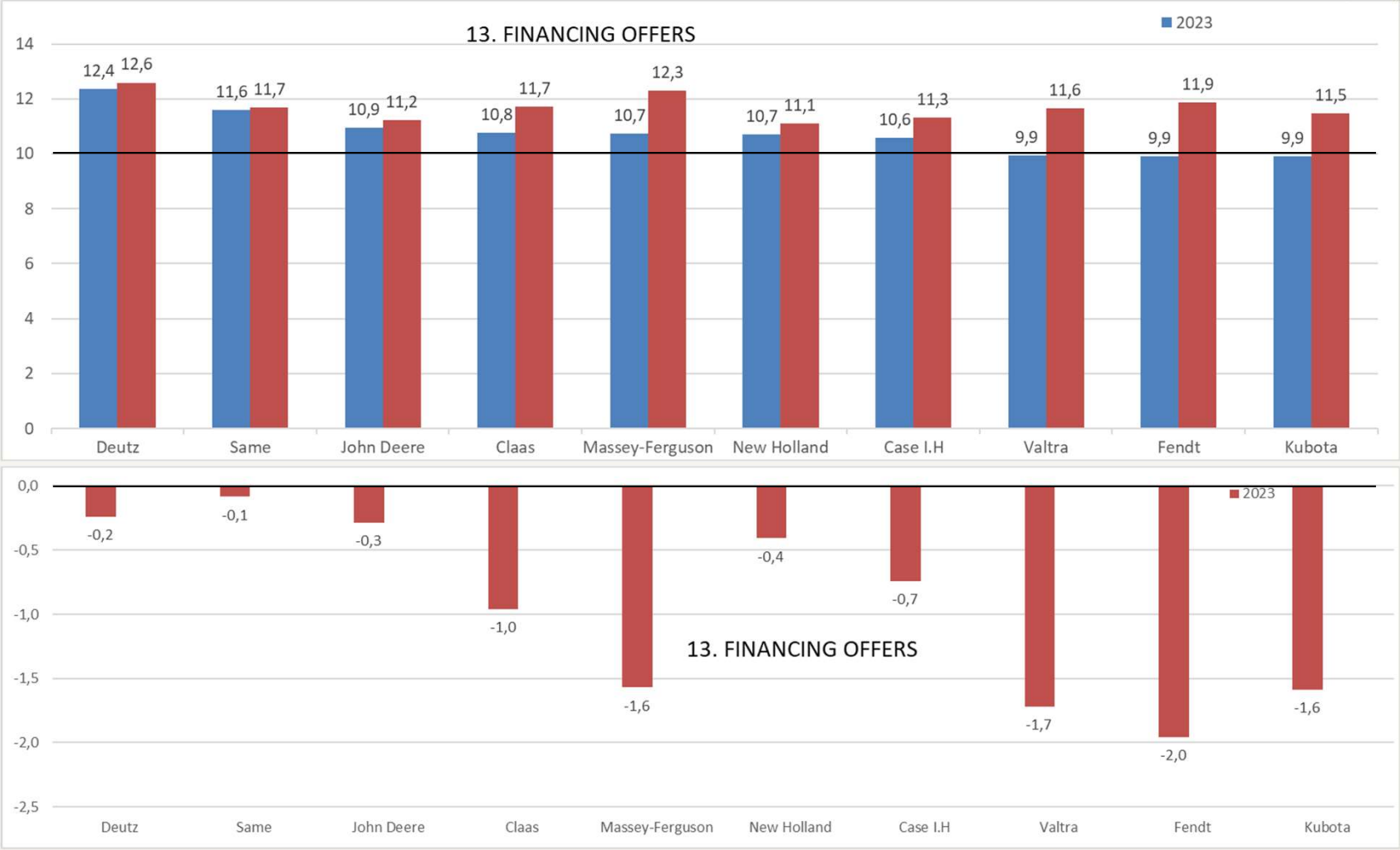


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FOCUS ON SOME SECTIONS

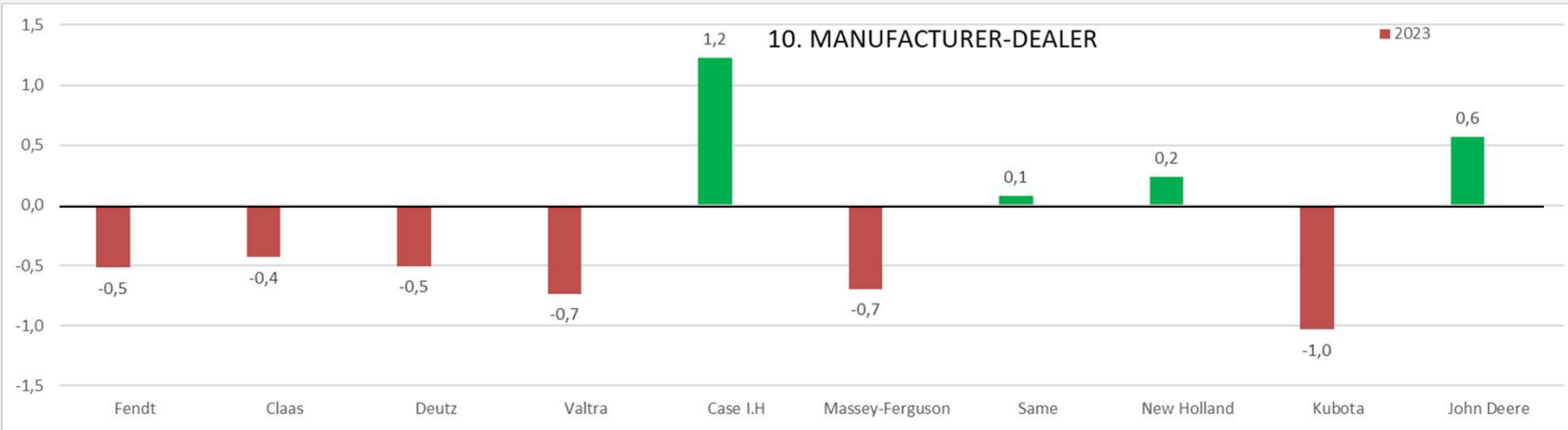
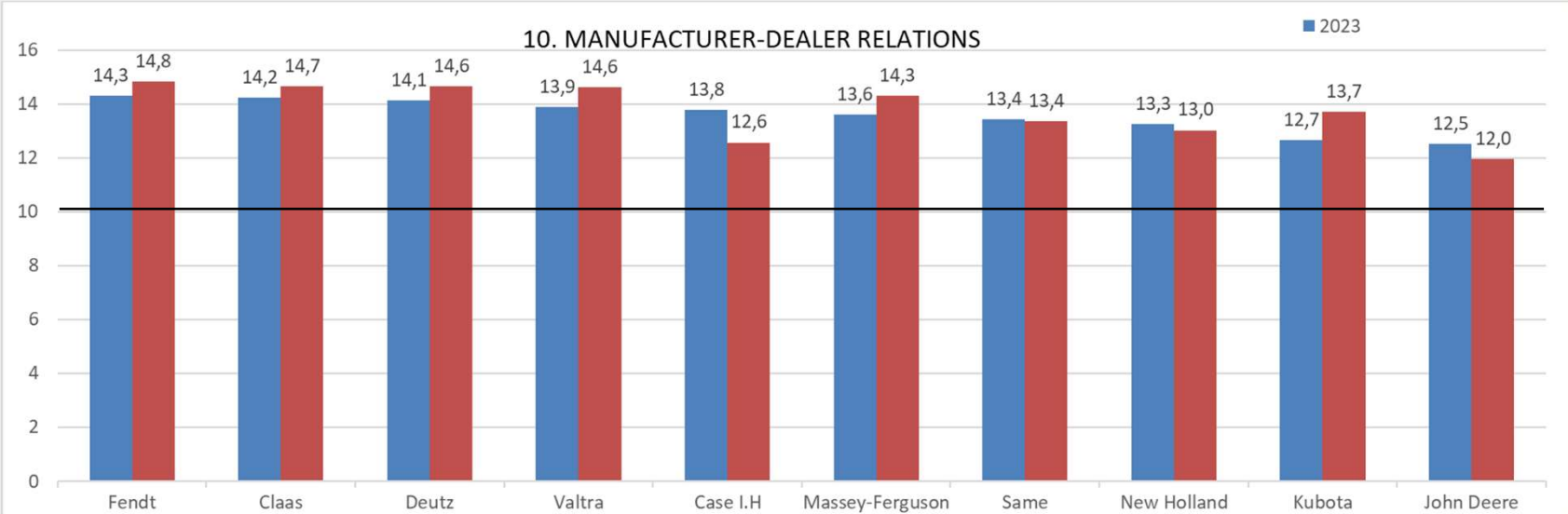
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Financing offers



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Manufacturer-Dealer relations



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Thank you for your attention!