



CLIMMAR MAGAZINE

2017

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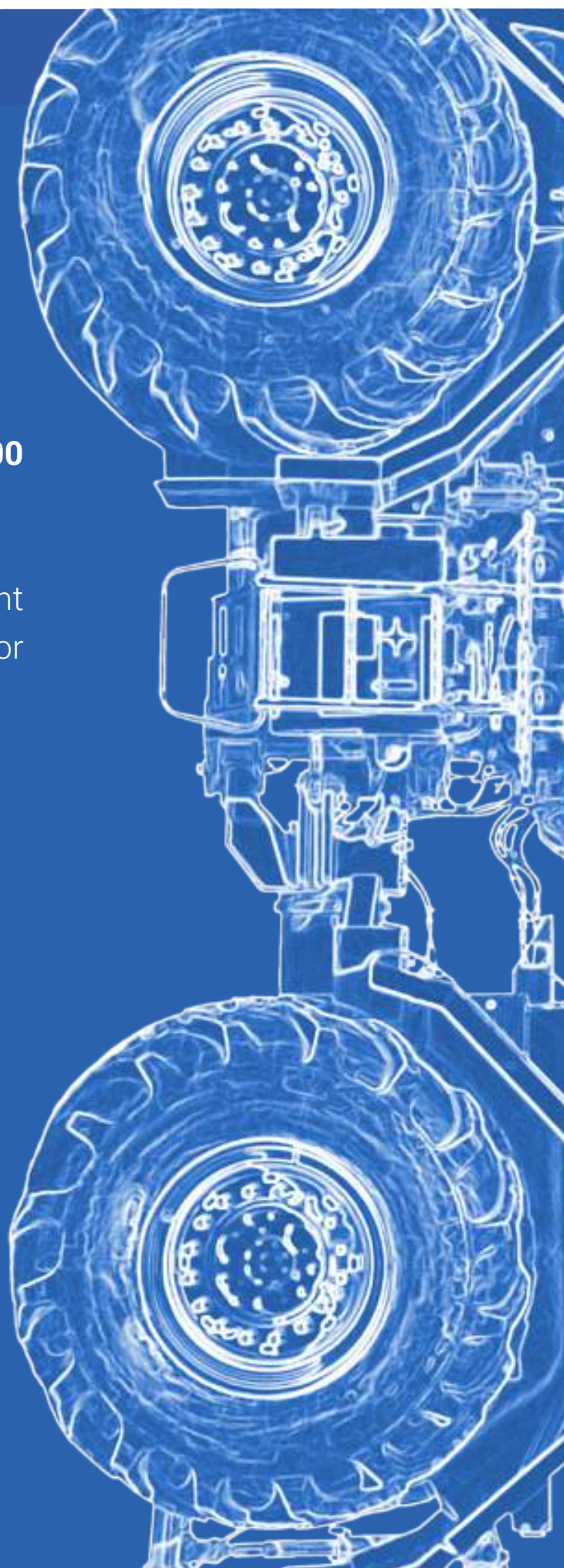
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Welcome to CLIMMAR

First of all, I'd like to express my pride as a president about our first annual report. It is an important step forward for us with which we want to give an insight in the activities of our members – 16 national branch organisations from all over Europe – who represent a total of 16.898 dealers and 139.894 employees. They all 'fuel' the success of CLIMMAR as an umbrella association.

Founded in 1953, CLIMMAR is the international association of agricultural machinery distributors. We consider ourselves to be an international 'melting pot' of all the associations, dealers and employees that rely on us. Exchanging and sharing information is our secret. Not only amongst each other, but also with stakeholders and fellow associations. In all our activities, we put the interests of our dealers at the forefront.

In recent years, our industry and members have faced challenging conditions. Our customers, farmers and contractors especially, suffered from low prices of commodities like milk, pork and cereals resulting in fewer investments in new tractors and machines. On the other hand, we see our industry and distribution changing rapidly and dramatically. Our suppliers, mostly large global manufacturers, continue their strategy to become full liners in order to be able to offer a complete product offering to their dealers and their customers. Recent examples include the acquisition of Kongskilde Agriculture by CNH Industrial and the acquisition of the Lely forage activities by AGCO. These strategic moves also result in changing distribution models and channels. A striking example is the recent change of John Deere in Denmark who completely changed their distribution model to one single importer and dealer organisation. Other examples are New Holland in Romania and the fight between Fendt and Claas in Germany.

Luckily, we currently see the first signs of recuperation of the economy in general and the agricultural machinery markets in particular. Farmers and contractors are willing to invest again in new tractors and machines, and in maintenance. A gradually increasing part of these investments will be in automation, robotisation and big data. We are at the forefront of a next industrial revolution often referred to as Industry 4.0. I strongly believe that this will change our industry and playing field as drastically as the shift from traction horses to tractors and mechanisation did. I'm also sure that this will result in new changes for dealers. We have to develop new business models for making money with data, robots and autonomous vehicles which is a true challenge for many dealers and distributors. It also requires different employees, different skills and sometimes a cooperation with or even the acquisition of a specialised (start-up) company.

I'm convinced that CLIMMAR remains to be able to play a decisive role in lifting our dealers and the industry as a whole to a next level. In this annual report, you'll discover various examples of our projects and activities like the Repair and Maintenance Information (RMI) lobby, Dealer Satisfaction Index (DSI), Branch Reports, exhibitions, education and apprentice programs as well as the EuroSkills competition. Yours sincerely,

Erik Hogervorst
President of CLIMMAR



PRESIDENT
Erik Hogervorst



SECRETARY-GENERAL
Jelle Bartlema



VICE-PRESIDENT
Ulf Kopplin



VICE-PRESIDENT
Joost Merckx

Open access to Repair and Maintenance Information (RMI)

Open access to Repair and Maintenance Information (RMI)

In imitation of the automotive sector (cars and trucks), the EU wants to “open up” the market of Repair and Maintenance Information (RMI) in the sector of agricultural and forestry vehicle. As of January 1, 2016, EU Regulation 167/2013 requires the RMI to be available to authorised dealers, repairers and independent service operators, regardless of brand and expertise. Manufacturers have to provide this access to vehicle RMI quickly and easy through websites in a standardised format and in a non-discriminatory way. A price for such information may be requested by the manufacturers also in a non-discriminatory way. The aim of these EU legislative provisions is “to ensure free and fair competition on the aftermarket and provide in the European Union the freedom to choose where and by whom the users of the agricultural and forestry vehicles would have their vehicles serviced”.

Till the end of 2015, only the EU manufacturers association CEMA was taking an active role in this file towards the European political institutions. The dealers and repairers were not involved in this debate till then. This changed when at the CLIMMAR congress in Stockholm, October 2015, CLIMMAR decided to start playing an active role in this file because it affects dealer interests.

Decision points by CLIMMAR

1: CLIMMAR is advocating the idea for maximum transparency in RMI data and communication protocols (such as realised in the automotive industry already), and to capture this into the European and national regulations and to play an active role. CLIMMAR

prefers that service providers and dealers act at a certain expertise level to freely make use of the RMI.

2: To start a project with the aim of implementing all the requirements necessary to achieve: Standardised access to all repair and maintenance information (RMI) on a central website of the manufacturer.

Work in progress

With the help and support of an experienced expert on this file during 2016, CLIMMAR was actively involved in shaping and influencing the final legislation with the input from the member associations.



In order to provide additional information on the implementation of the legal requirements specified by the EU Regulation 167/2013 and its delegated acts, and to consider the specific conditions in the sector of agricultural and forestry vehicles, the European Commission provided the European Committee on Standardisation (CEN) with a mandate to develop a European Standard (EN).

Extensive work has been done on formulating a draft standard (prEN 16944).

This was done within the so-called TC 144 Working Group of the CEN. The first draft was written without the involvement of the CLIMMAR. During several formal and informal meetings, CLIMMAR repeatedly claimed that the formulated draft standard prEN 16944 was not compliant with EU Regulation 167/2013 and that it would be necessary to start developing a draft version with all stakeholders and to withdraw the current version of prEN 16944.

By the end of 2016, the decision was reached that a new version of the standard should be made which also represents the so called “use cases” for standardised access to RMI and to bring the implemen-

tation of the standard to ISO stage. This was what CLIMMAR had claimed for and the decision can be considered as a positive outcome. The continuation of the process is that a new standard should be drafted under ISO instead of under CEN. For CLIMMAR the first goal has been reached: open access to RMI. Now the process of further implementation will take place and CLIMMAR will try to contribute to this process in a positive way.

Workgroup “Branch Reports“: Data from Europe for the members

For a long period of time CLIMMAR has asked their members in so called „models“ for statistical data from the national branch. But this survey was too large to fulfil completely and the results were not really useful for the members' use. That's why the new presidency in 2014 decided to restart the CLIMMAR-statistics completely, with focus on obligatorily integrating all CLIMMAR-members – CLIMMAR expects a „change in daily work“, shorten and concentrating the survey based on the old „models“, but developing it year by year and creating useful results that national members are pleased to work with.

That was the day the new CLIMMAR-Workgroup 2 „Market Reports“ was founded, chaired by Germany. Workgroup 2 cut down the old survey concentrating onto these basic needs:

- **Basic national markets data:** number of dealers, employees, tractor-sales
- **Current branch trends:** How was it, how will it develop? Quick check for 10 key-items like turnover, costs, investments
- **Average dealer data from national members:** average turnover per dealer, margins, costs, wages
- **Warranty conditions:** detailed overview of the most important brands

Making this easier, Workgroup 2 separated the survey-figures in “obligatorily to answer” and “optional to answer”. The effort: Meanwhile a lot more members are participating in the survey, 71% of the obligatory questions are answered and 36% of the free ones. Some member-countries implemented CLIMMAR's questions in the national task area for the first time. That means: The CLIMMAR figures become more and more relevant.

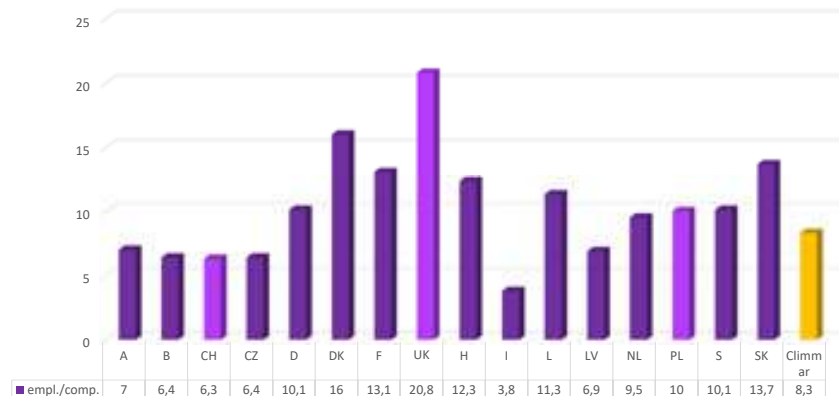
Every year on the congress, a short overview on the current results is given, all CLIMMAR-members get the full results afterwards. Here a very short version, starting with **basic national markets data**.



Workgroup 2 „CLIMMAR Market Reports“ with (left to right): Chairman Ulf Kopplin from Germany, Dr. Viktor Medina (Hungary), Secretary Ulrich Beckschulte (Germany), Dr. Manfred Kandelhart (Austria), Pär Thunström (Sweden) and Engelbert Pruckner (Austria).

National Markets and Structures:

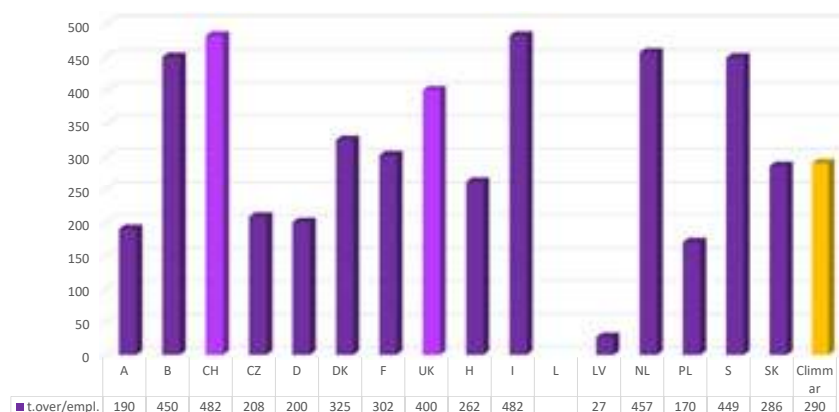
relations: Employees per Company



All over CLIMMAR every company employs 8.3 persons; the largest units (national averages) are in UK and Denmark.

National Markets and Structures:

relations: Turnover per Employee



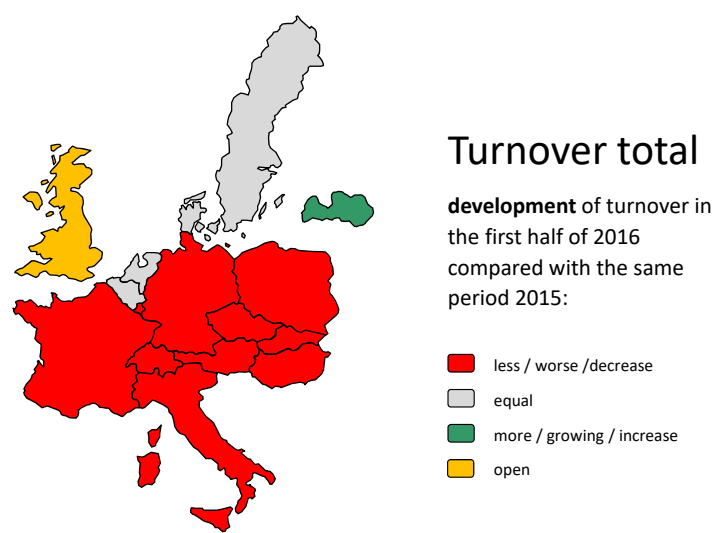
In relation the turnover looks like: In the average every employee creates a turnover of 290,000 €.

Next is the view on **current branch trends**. Here CLIMMAR shows the results in a tableau even on a map and finally as an index. The question is always the same: In comparison with the previous year were there better, equal or worse developments to be seen in turnover-groups (new and second hand equipment, workshop, parts), in costs, employees, stock and investments.

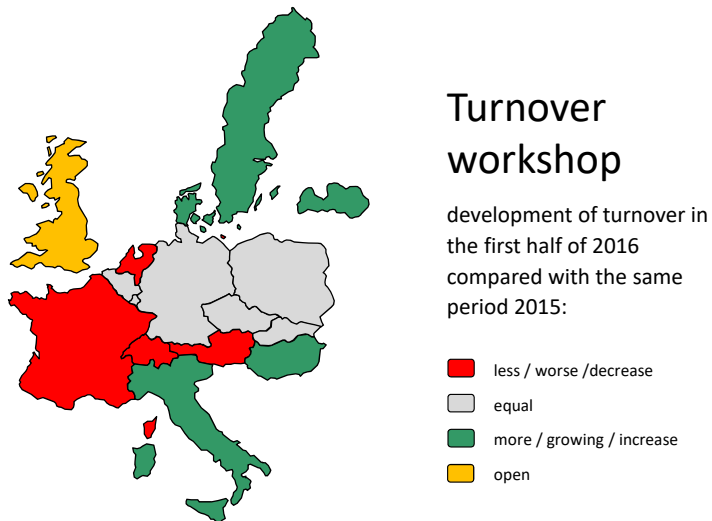
But this was only the overview of national results – how is the average trend in Europe at large looking like? For that the index-view was developed: We weighted every „plus“ and „minus“ with the country it is coming from and so finally got an index for the branch-trends in CLIMMAR-Europe – one for “How was it?” and another for “How we expect it to develop?”:

I. Comparison to same period last year: January - June 2016				
		- (minus / worse)	= (equal)	+ (plus / better)
A.	Turnover total	A CH CZ D F H I L PL SK	B DK NL S	LV
A.I	Turnover Machinery	A CH CZ D F H I L PL SK	DK LV NL S	B
A.I.1	New machinery	A CH CZ D DK F H I L LV PL SK	NL	B S
A.I.2	Second hand	A F H PL	B CH CZ D I L LV S SK	DK NL
A.II	Turnover Workshop	A CH F NL	B CZ D L PL SK	DK H I LV S
A.III	Turnover Spare Parts	A B CH F	CZ I L PL SK	D DK H LV NL S
B.	Costs		A B CH CZ DK H I PL S SK	D L NL
C.	Employees	NL	A B CH CZ D DK F I L LV PL SK	H S
E.	Stock	I LV	A B CH CZ DK PL S SK	D F H L NL
F.	Investments	A CZ D DK LV PL SK	CH H I L NL S	B

In which countries turnover changed in the 1st half of 2015 to 2016: better, equal, worse – shown with vehicle country codes



Shown on a map: Having a look on Europe's map there is a lot red to be seen – there turnover was worse



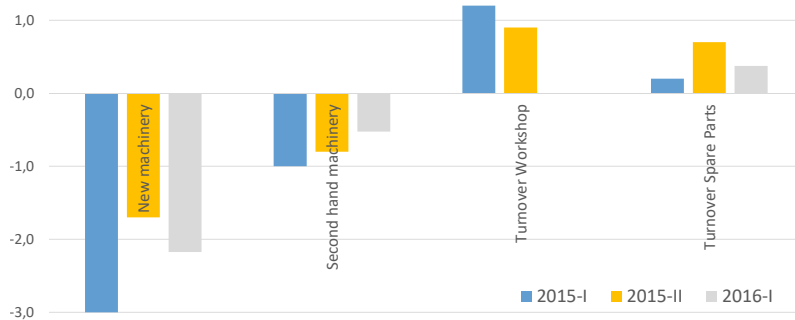
Shown on map: Looking at the service-segment there is a lot more gray and green.

The **average-dealer-data** is the most complicated one, here lots of members aren't able or willing to give the answers CLIMMAR is asking for; but it gets better every year. For example a view on the average income of a master in the workshop.

At last CLIMMAR wants to compare **warranty conditions** of the most important brands, compared in details of about 10 aspects, country by country – and there are a lot differences to be seen... Ask your national associations' offices: they have the current conditions from these brands and countries.

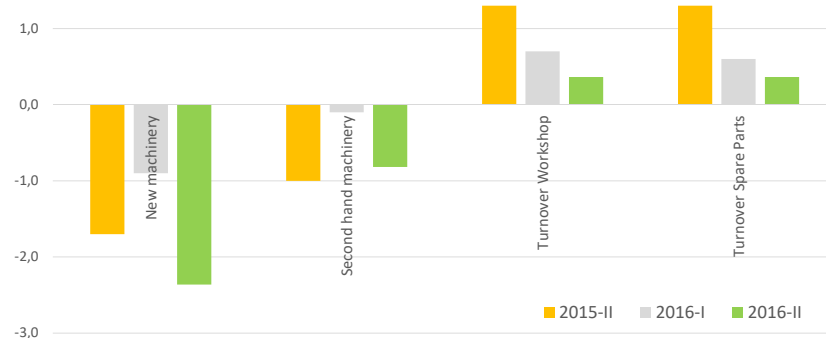
All in all CLIMMAR-Workgroup 2 is quite satisfied with the members work, except one. We still believe that there is some minimum and absolute indispensable marks to be asked for; so the survey for 2017 will become renewed, but just a bit. All members are invited to influence our work by joining our meetings.

Development Trend Indices: Turnover



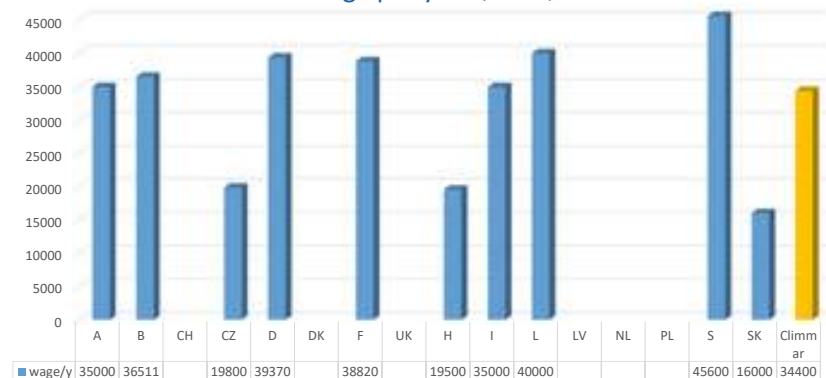
In the 1st half of 2015 all members had worse development in new equipment turnover (left bar graph the blue one), in second half (orange) is was "just" even -1.8, in the 1st half of 2016 (gray, -2.1) again worse.

Indices for Expectations of Turnover



What do you think how the branch develops? It is the other question – for the dealers stomach: In most of the cases this estimation became true. Watching the new machinery segment (left bar graph, green column, -2.3) the 2nd half of 2016 will be the most difficult ever.

Wage per year (master)



	A	B	CH	CZ	D	DK	F	H	I	L	LV	NL	PL	S	SK	UK
JD	x	x	x		x	x	x		x	x						
NH	x	x	x		x	x	x		x	x						
Claas	x	x	x		x	x	x		x							
MF	x	x	x		x	x	x		x	x						
SDF	x	x	x		x	x	x		x	x					x	
CASE IH	x	x	x		x	x	x			x						
Valtra	x		x		x	x	x			x						
Fendt	x	x	x		x	x				x						
Landini	x					x			x							
Kubota		x	x				x		x							
JCB					x					x						
Kuhn	x						x									
Pöttinger	x						x									
Krone	x						x									
Merlo							x									

DSI (Dealer Satisfaction Index): a survey where European dealers appreciate their tractor suppliers



The origin of this action was the first survey made in France in 2005. It was presented at the CLIMMAR congress the next year, then Germany started the same survey in 2008, with the same questions, and the first common survey (France & Germany) was presented in 2009.

In 2010, the first European survey counted 5 countries, 7 in 2011, 9 in 2014. Now we receive answers from more than 1200 dealers of 17 different brands of tractors coming from the main agricultural European countries.

What are the main aims of the DSI survey?

The first aim of this survey was an answer to the dealers complaining about too high interference of the tractor manufacturer inside the dealership management, and more generally about a high pressure on the network, a way to know what was the real thought of each network about their manufacturer.

First of all, it is considered as a positive process, with a willingness to give dealers tools to improve the general relationship between manufacturers and dealers. It is a way to help dealers and to bring answers that can be shared, and convincing arguments when negotiating.

The final results are sent to the brands headquarters, except some items that could interfere with commercial topics. CLIMMAR does not publish countries results, but only overall results.

Each participating country can compare its own results with the European results, and this is also a way to introduce arguments in the discussion.

The DSI counts 70 questions in 14 headings, the same in each country for the European comparison.

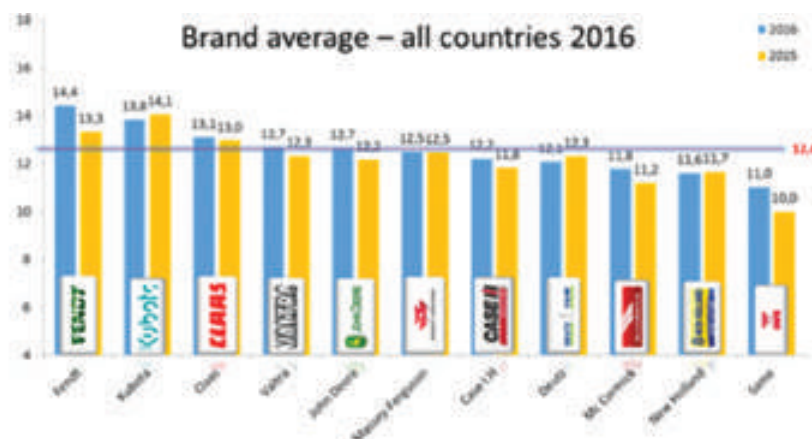
The results of the survey are published and presented during the first international exhibition following the congress.

For example, during a CLIMMAR press conference at Agritechnica, SIMA or at EIMA.

As decided during the congress, the presentation in each country is depending on the habits of the country (press conference, meeting with brands, congress, etc...) and the form of the presentation is free.

To be able to have significant results, we need your answer! Thanks for answering the next DSI!

The European results (final ranking) for the last 3 years show the evolution of the brands.



Training for the future

The commitment of CLIMMAR in terms of training can be spread out in four parts:

- **CLIMMAR is the basis for the organisation of training periods of students inside the 16 member countries.**
- **CLIMMAR is the place to study and compare the different educational systems as we do for the economical facts and the ratios of the profession inside Europe.**
- **CLIMMAR is also the place to promote the jobs and the training systems in order to bring young people to the profession.**
- **CLIMMAR is engaged in the Worldskills Europe organisation for the competitions like Euroskills held every two years.**

CLIMMAR has always been deeply involved in the training, promotion and development of our trades. Even before joining the organization of Euroskills, which promote the profession of agricultural machinery mechanics and technicians, the CLIMMAR Skills had shown the wish to create a European platform for vocational training.

The exchange of students (mechanics and technicians) inside CLIMMAR started in 2002 with the help of the European programmes LEONARDO and ERASMUS. With the participation of schools and the dealerships members of the national organisations, this action creates a positive and fruitful relation based on vocational training inside Europe. This action is also

sometimes relieved by other actions like twinnings between schools or colleges.

CLIMMAR and Skills: the idea to organise a European competition for students at the end of their training in maintenance of agriculture machinery was something that CLIMMAR members had in mind for quite a long time.

The first CLIMMAR Skills were held in Switzerland in June 2008. The second ones were held in Holland within the framework of the open-air trade fair AgroTechniek Holland in September 2010.

Following these two events, CLIMMAR was approached by the Euroskills organisation and decided to join the European competitions. So CLIMMAR was present at Spa Francorchamps in Belgium for the Euroskills 2012, in Lille in France for the Euroskills 2014, in Gothenburg in Sweden for the Euroskills 2016.

Special focus on this last competition in Gothenburg was on excellence, performance, endurance, preparation, stress, competition... That is what lived the eight candidates before and during the 5th Euroskills competitions in Gothenburg, Sweden.

The aims of this scheme are manifold. First, of course, there is the competition between students from various countries, but it is also a way to compare the different training systems. Last but not least it is a great way to promote our jobs.

In fact, the promotion of our jobs was the main topic of the Riga forum in 2011

where we talked about the way each country was organising the promotion of our jobs and trainings. Like everything else that CLIMMAR does, the aim is to gather the best ideas, compare the results and share what works best.

Obviously, the most difficult is to get the population and the general public to take an interest in agriculture, and particularly in the jobs linked to agricultural machinery. It is also difficult to popularise these little-known jobs.



It is the main objective of everything we do, which takes various forms from one country to the other.

The promotion of our trades is also done on a regular basis in our member countries, especially during the big trade fairs devoted to agricultural machinery such as Agritechnica, SIMA, and EIMA, but also during Agricultural weeks or fairs such as SIMA in Paris. For example, after such an event in France, the number of young people entering vocational training in agricultural machinery is increasing.

Workshops and shows featuring live performances help highlighting all the assets of our technical trades as well as receiving large media coverage. There are many films and promoting tools which can be used in the schools everywhere and can be found in the different members organisations websites.



Euroskills 2016 in Gothenburg

8 countries for “Agricultural mechanic” skill



Excellence, performance, endurance, preparation, stress, competition... That is what lived the eight candidates before and during the 5th Euroskills competitions in Gothenburg, Sweden.

Mikhail Mesheryakov (18) from Russia, **Anders Ebbekaer Pedersen** (23) from Denmark, **Maurice Bakker** (23) from The Netherlands, **Christian Hilpert** (21) from Germany, **Maurice Häner** (23) from Switzerland, **Thibaut Laboute** (23) from France, **Krisjanis Jurans** (24) from Latvia, and **Dominik Stauffer** (23) from Austria, were the Europeans champions in their country that have brilliantly competed during three days on five assignments.

The tasks were based on five big themes: hydraulics, electronics, engines, reparation and setting in motion, mechanics, and on the following machines: tractors, scrapers, big balers, forestry machines and engines.

The eight candidates were judged on theory, practice, but also on thought process, deductive reasoning, security, explanations in English.

They have been prepared and judged by the following experts: Valeriy Lyovin from Russia, Per Hedetoft from Denmark, Au-

gust Mussmann from Germany, Alexandre Cabrol from France, Janis Vitols from Latvia, Werner Seltenhammer from Austria, and of course by the Deputy chief expert Paul Sidler from Switzerland and the Chief expert Paul Dijkstra from The Netherlands.

Congratulations to all, and specially also for the medallists!

Gold	Anders E. Pedersen (Denmark)
Silver	Christian Hilpert (Germany)
Bronze	Krisjanis Jurans (Latvia)

Thanks also to the two Swedish teachers on the stand, Lars Holm and Fredrik Jensen, who helped to bring the machines and to be present during the competition, and also to AXIMA, the Swedish company who brought the three tractors, two balers, two scrapers, the engines and the forestry machine!

The school was also responsible for the **‘try-a-skill’** corner nearby the stand, where the young visitors could practice on simulators some agricultural works and enjoy a game before receiving information on the skills and the possible future careers.

Sweden were expecting 40,000 visitors, but more **75,000 visitors** attended this big event, coming mostly from the South part of Sweden and from some neighbour countries. It was a big success.

This is the way of promoting our jobs to the public and specially the schools visiting the competition. A lot of televisions from different countries were present, for example in France the two most important televisions TF1 and France 2 were present during all the competitions and will give reports that we will use later on.

Following programme

At the end of the competition, the experts decided to change the name of the skill and to be more in phase with the Worldskills competition. “Agricultural mechanic” will become “Heavy vehicle technology” and will be based on a larger types of machines. It was already the case here with 2 scrapers and the forestry machines.

The Chief expert and the Deputy Chief expert remain the same after the votes Paul Dijkstra and Paul Sidler. Werner Seltenhammer is also ready to help for the future.

The next Euroskills competition is in Budapest (September 26-28, 2018). Pal Kis and Viktor Medina, from Megfosz, were present 2 days on the competition and learned a lot for the following edition.

The following edition will be in Graz, Austria in 2020.

CLIMMAR Spring Forum 14 & 15 April 2016, Brussels





About the organisation

The „ARGE Landtechnik“ represents the interests of the Austrian agricultural dealers sector in various areas, like legal, economic and technical issues and is a cooperation between the Federal Association of Machinery and Technology Trade and the Federal Association of Metal Technicians. All these organisations are part of the Austrian Federal Economic Chamber.

We help and assist our members in the above mentioned areas, have strong contacts with our ministries and also with the representatives of the agricultural sector in Austria. We organise meetings for our members and try to develop a positive image of our sector and the profession. Moreover we are also responsible for the education of our employees and also the entrepreneurs.

Key figures and contractor profiles

In Austria, we have a total of approximately 900 agricultural machinery dealers. Due to the special construction in Austria they are all members of the Austrian Federal Economic Chamber. They are specialized in delivering machines for agricultural and forestry services, livestock breeding, landscape maintenance, they act highly efficient and have specific know-how in our sector.

The turnover of our branch including service and maintenance totals about 1.5 billion Euro plus our turnover with used machines.

For example, in Austria we sell about 4,500–5,500 tractors on average and 100 harvesters. We employ about 8,000 people in different functions. That means that our members have 9-12 employees on average.

NAME

ARGE Landtechnik

PRESIDENT

Engelbert Pruckner



GENERAL SECRETARY

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**ZIE HET
GROOTSER!**

KRAMP

SPARE

Belgium (FEDAGRIM)



Fedagrim ASBL, the Belgian federation of suppliers of machines, buildings and equipment for agriculture and green spaces, is an association of national and regional manufacturers of tractors, agricultural machines, and material for gardens, parks, and forests, as well as companies building and dealing in barn equipment in Belgium.

The federation consists of four sub-groups, one of which is an association of those companies distributing agricultural and garden materials. The federation has 67 member dealers, representing 20 % of all Belgian tractor dealers. In 2015, the total turnover of this sector was around €969,267,000.

Despite significant demand for agricultural mechanics, the level of employment in these companies has remained rather stable over the last 10 years, due to the difficulty in finding qualified staff. In 2015, a Belgian dealer employed an average of 6.4 workers (based on FTE = Full Time Equivalent). Dealers who belong to Fedagrim boast higher employment levels, employing an average of 9.2 FTE. Machine sales, on the other hand, were stable, with sales amounting to 2,243 tractors and 73 combine harvesters.

Some agricultural distributors are able to carry out other activities, such as the sale, rental, and repair of machines and equipment for industries including landscaping, civil engineering, materials handling, cars, building, bikes and motorbikes; machine import; work for agricultural and/or horticultural companies; the sale of products connected with the garden industry; retail commerce; the construction of buildings and stables.

As an example of the services offered by Fedagrim to its members, over the last year they organised a number of meetings with themes such as organising a showroom, managing a shop, the latest European legislation on a Europe-wide certification process, and communicating with clients. This year, for the third

year running, Fedagrim also conducted a satisfaction survey among Belgian tractor distributors.

In 2016, its results represented the views of over a third of the market in tractor distribution. Also, for the first time, each distributor was able to receive detailed results of his/her brand(s). Other news is that Fedagrim has joined forces with a public employment partner to organise a course to train those seeking work as an agricultural mechanic. This training is to be conducted partly in a training centre and partly in companies, and began in November 2016, with completion scheduled for June 2017.

In addition to developing activities for its members, Fedagrim also organises four events:

- Agribex, the international trade fair for agriculture, farming, gardens, and green spaces, held every two years in Brussels. The next edition will be held between 5 and 10 December 2017.
- Demo vert, the largest Belgian open-air demonstration of materials for gardens and green spaces, sports fields, and urban cleaning, organised every two years in the park at Laeken in Brussels.
- Demo Fenaïson, which takes place every four years, is an open-air demonstration of haymaking materials.
- Potato Europe, held every four years by the Belgian federation, is a potato trade fair including a demonstration of materials involved in the harvesting of potatoes.

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Agricultural Machinery Importers Association (SDZT)

The Agricultural Machinery Importers Association was founded in 1994 as the Czech trade association for importers of agricultural and forestry machines. SDZT supports independent agricultural machinery dealers across the Czech Republic providing support and services to industry.

SDZT is a forum for cooperation and exchange of experience, and a body for acting in common questions in the trade, it works for healthy and appropriate commerce. The focus lies on compiling statistics and coordinating national trade fairs in the best interest of the members.

The agricultural mechanisation industry is characterized by a high degree of innovation. The mechanisation industry operates in a dynamic world: upscaling and globalizing agro-businesses, the increasing importance of technology plus the integration of the production and service chain. Machines and vehicles are getting bigger and faster. This compels the industry to look with increased concern at safety issues during operations, or on the road. SDZT underlines the importance of testing and certification.

SDZT represents the interests of its members and industry as a whole by campaigning to improve the trading conditions for dealers within the Czech Republic by working together with other industry partners and various government departments. SDZT co-operates very closely with the association of manufacturers. Therefore, these parties can address areas of attention more efficiently. These platforms also constitute one interlocking entity in terms of agendas for strategy and lobbying.

Based upon a joint approach, SDZT wants to utilize the efficiency of the industry more effectively, as well as to promote it. To achieve these aims, SDZT cooperates with politicians, and collaborative partners. SDZT boasts specific know-how in the agricultural mechanisation industry. SDZT has good contacts and networks to propagate their expertise more widely. SDZT wants to achieve more results for its members, and for the industry as a whole. In this context, a strong, mutual voice receives a better hearing than the voice of an individual company that only safeguards limited interests.

All decisive importers are now members of SDZT. The total amount of member companies is currently 47. The daily work is run from an administration located in Brno.

NAME

SDZT

PRESIDENT

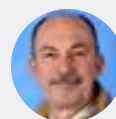
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About The Association of Danish Agricultural Machinery Dealers

The Association of Danish Agricultural Machinery Dealers is the official industry and employer association for agricultural machinery in Denmark. The association was founded in 1918 and will be celebrating its 100th anniversary next year.

The membership includes 130 main stores with 194 outlets across the country, constituting 95% of all machine dealers in Denmark. In 2015, the members had a turnover of approximately 8.8 billion DKK distributed on new and used equipment as well as on spare parts and repairs. As of 30 September 2016, the members employed 2,820 employees within service, parts, sales, and administration.

The average member sells 10 new tractors per year, has 25 employees, and produces an average profit of 70,000 EUR.

The Danish agricultural machine market

In recent years, sales of new tractors have declined significantly, from 3525 in 2007 to 1530 in 2016. From 2015 to 2016 alone, we witnessed a decrease of approximately 13%. As for other agricultural machinery, sales was likewise on a decline from 2014/2015 to 2015/2016, with a drop of 3% on combined harvesters, 15% on balers, and status quo on foragers.

The market indicates a trend towards greater owner units among machinery dealers, but approximately the same number of outlets. Machine dealers will not turn down, but will come up with solutions to galvanise the distributor structure.

Danish agriculture

Danish agriculture is among the world's most efficient and knowledge-based agricultural clusters. We hold a leading position when it comes to food safety, quality, and development of new agricultural products. We have over 2.6 million hectares of cultivated land, which is more than 60% of Denmark's area. Denmark has around 36,000 farms, and we produced 5,300 million kilos of milk and 1,950 million kilos of pork in 2015.

Agromek

The Association of Danish Agricultural Machinery Dealers is co-organiser of Agromek, which is Northern Europe's largest agricultural fair. Agromek was held in November 2016 in Herning, Denmark. This was four very positive days. The good atmosphere was, partly, due to expectations of a brighter future with rising prices on agricultural products. This provides the opportunity that Danish agriculture may initiate a much needed renovation and modernisation of the production machinery. Agromek had 41,688 visitors in total.

Euroskills

We are proud that Denmark has the best agricultural machinery mechanic in Europe. After Euroskills in Gothenburg, 23-year-old Anders Ebbekær Pedersen can call himself the European champion within his profession.

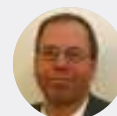
This is a unique achievement, as Denmark, after all, is one of the small nations in this context, and thus only have a limited amount of apprentices to choose from. We fancy comparing Anders' achievement with the Danish national football team's European Championship gold in 1992.

NAME

The Association of Danish Agricultural Machinery Dealers

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**Dansk
Maskinhandlerforening**

*Sikkerhed
& kvalitet*



SEDIMA is the only organisation which regroups the dealers in France for distribution and service for agricultural and garden machinery. It was created in 1919 and so will celebrate its 100th anniversary. But this profession is always looking for the future, for new projects, first for the members but also with all the environment and specially involved in training and education.

Economical facts

France is the biggest market for agricultural and garden machinery in Europe:

- 2,700 firms from 1 to 500 employees
- 35,000 employees
- €11 billion of turnover

Over 70 % of the turnover of the profession is realised by members of SEDIMA

Our members

- Work in different geographical areas, with a wide range of sectors: crops, breeding, milk equipment, vineyards, irrigation, forestry, arboriculture, market gardening, landscape maintenance.
- Their know-how: sales of new and used machinery and equipment, after sales maintenance and service in the workshops and outside, renting of machines, sales of spare parts in the free-service shops, training and advice.
- Their customers: farmers, groups of machines users, agricultural works contractors, local collectives, landscape gardeners, individual customers, and all the persons related to earth cultivation.

The mission

- To represent the profession to the authorities, to the whole branch and to the professional organisations.
- To federate the members: congresses, conventions, general assemblies.

- To promote the exchanges: regional and departmental meetings, group of young dealers, working groups, specific trainings.
- To defend the rights and interests of the members: collective agreements, initial and continuous training, dealer satisfaction index, code of deontology, risks and painfulness.
- To anticipate: surveys, economic and social futurology, tools for the firms (ratios, wages barometer, online second-hand machines quotation).
- To advise and assist: social laws, contracts, quality, environment, recruitment, tax system laws.
- To train: relations and work with the ministry of education, vocational continuous training, specific vocational training for the profession.

SEDIMA has 14 working groups that work with one specialised employee and 6 to 11 members on different subjects: social, training, guaranty, security, communication, satisfaction index, international relations (CLIMMAR), used machinery, young dealers, specialised jobs, garden, economy and management.

SEDIMA is also present during the SIMA show, during professional exhibitions like SPACE, Sommet de l'élevage, SITEVI, and during promotion and orientation shows for the youngsters.

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Syndicat National des Entreprises de Service et Distribution du Machinisme Agricole et des Espaces Verts

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Annual sales of new machinery	2014	2015	2016
Tractors	24 948	24 890	22 653
Vineyard and orchard tractors	3 386	3 699	4 091
Garden machinery tractors	4 286	4 521	4 271
Combine harvesters	2 292	2 006	1 821
Round ballers	2 204	2 168	2 302
Telescopic loaders	3 205	3 570	3 987
Agricultural trailers	9 081	9 153	8 864



Association's structure

The structure of firms and their association in Germany differs a lot from our sister-associations in Europe: it is a grown one, coming from the service side. Regional companies acting in our branch come together in a regional employers' circle called "Innung", all Innungen in a country found an over-regional construct named "Landesinnungsverband" and these ones build on top the national relevant association "LandBauTechnik-Bundesverband" (LBT). That means LBT formally has 12 members, but represents about 4,300 companies, dealing with agricultural equipment, even garden-, construction- and cleaning-machinery and, most important: the do the service for all. Not included are construction-companies (industry) or contractors (most important customers). All in all LBT covers about 60% of the companies and more than 90% of their market share.

About 600 of the companies have exclusive contracts with most important tractor brands, so-called A-dealers. These normally are larger, create more turnover and in most cases have own satellites in the countryside and are organised in so called "Brand-Associations". On the other hand there is a special daughter association for dealers that concentrate on the garden and municipal machinery called "Bundes-Fachgruppe Motorgeräte".

GERMANY

In Germany we count 4,330 active companies with 44,000 employees creating €9.1 billion turnover (2015). 3,600 of the companies are educating and training apprentices, all together 7,700. Only 1% of all apprentices are female.

Market and Branch

In Germany meanwhile just 286,800 farmers cultivate 16,725,000 ha, average farm size is 58.3 ha. In Eastern Germany the average farm size is 232 ha, in the South 37 ha and in the North 70 ha. That means the concentration of the customers is varying enormously, as well as their activities. If we compare the national average with the A-dealers at all there are even more differences to be seen.

Association's current items

LBT's most important item is qualification of the whole staff in the dealerships, this means: from the base through the whole life. For that LBT is busy in continuously developing the basic qualification for apprentices. The same is guilty for the next steps on the branch-ladder: LBT developed an official degree named "Service-Technician" – a very intensively focussed expert for all technicians items, that is needed in the more and more

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LandBauTechnik-Bundesverband e.V.

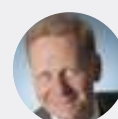
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Agricultural equipment dealers in Germany: basic structures	all companies	exclusive companies (A-dealers)
farmers per company	65	567
ag-area per company (ha)	3,863	33,584
tractor-immatriculations per company	9,3	80.7
second-hand tractor sales per company	18	159
tractors in farmers stock per company	323	2,811
employees per company	10.1	44.1
turnover per company (1.000.000 €)	2.1	14.7
contractors per company	0.8	6.7

specialising workshops. Even the qualification-system for the highest top-level, our "Meister", is regularly recreated by LBT. The results of these efforts are clear: agricultural equipment-service is one of the only professions in Germany that is growing year by year since 1995. A very important item is our campaign for promoting branch and profession "starke Typen" ("technics for solid youngsters") supported nearly by the whole branch.

LBT is partner of the Agritechnica, and of some more exhibitions of national importance like DemoPark (garden- und municipal equipment), EuroTier (animal husbandry) or Re-TEC (used equipment).



MEGFOSZ (National Association of Agricultural Tool and Machinery Distributors)

MEGFOSZ was established on 19. May, 1999 with the purpose to represent professional interest of the Hungarian Agricultural Tool and Machinery Distributors, to determine their mutual goals and to realise them.

An important task of the Association to determine the basic norms of the members operation, making known the provision of law, participation in preparation of changing law. The Association express the opinion of member companies in the permission and control issues of agricultural tool and machinery distribution for the increase of efficiency. Influencing the other conditions of machinery distribution (subsidy, credit, leasing) in order to help the activity of the members.

Another task of Association is to have and up-to-date and precise data base and its continuous actualization, operation and expansion and provide it to Association's members.

Preparation of evaluation of domestic and international market and submission of its analysis to the members during professional forums or any other ways. Organizing exhibitions and fairs to advertise the Agricultural Tool and Machinery distribution.

MEGFOSZ management was renewed in 2012. The new management is very actively organized the Association operation and it brought results. The number of Association's member companies is continuously increased, in 2012 the Association had 60, in 2016 they had 95 member companies, and there are 3 more candidates, who are just waiting for becoming new members. It is undoubtable that Association became successful and stronger.

Annual turnover of MEGFOSZ members from the distribution of agricultural tools and machinery was approximately 800 million EUR in 2015, 717 million EUR in

2016. This means more than 90% of the whole market, so this shows very well the power of the members of Association. Sales of new tractors was 2.279 pieces in 2016 in our country (search: AKI statistics). Amount of employees working within the companies of the sector is about 3200 people in 238 firms in 2016. There were about 320 people in the sector as trainee in 2016.

MEGFOSZ is a non-profit organization and has started a program in 2014, called: „Be an Agricultural Engineer!” The main goal of this program is popularization of the sector, joining more than 100 partners, such as Ministry of Agriculture, The Hungarian Chamber of Agriculture, MKB Bank Zrt., Hungarian Association of Agricultural Machinery Manufactures, and almost all of the agricultural secondary schools.

Goals of our program

- MEGFOSZ would like to assure the agricultural replenishment: mechanic, mechanical engineering, machine operator, etc.
- Increasing the prestige of the agricultural career.
- Improving the employment rate of the agricultural sector outside the capital Budapest.
- Increasing competitiveness of the Hungarian agricultural output through assuring the appropriate experts in long term.

Our plans for 2017 is to continue the foregoing success of the popularization of agricultural machinery workers, the continuous and long term development, the openness of the Association towards other professional Associations like MEGOSZ (Hungarian Association of Agricultural Machinery Manufactures), National Agricultural Chamber or the related Ministries. This cooperation covers the fields of subsidy systems, regulations of registry and road usage of agricultural machines.

The cooperation with MKB Bank Zrt. is very special, because there is no more such a large-scale cooperation in the sector in Hungary.

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Exhibitions

There are a lot of agricultural regional exhibitions in Hungary, so our Marketing Committee has decided to focus only the 3 biggest event in order to help the members optimize their exhibition budget. The three big exhibitions are:

- AgrárgépShow, Budapest
- Alföldi Állattenyésztési Napok, Hódmezővásárhely
- MEGFOSZ Szántóföldi AgrárgépShow, Mezőfalva



UNACMA, the National Union of the Agricultural Machineries' Merchants, is the Italian association representative of merchants, workshops and spare parts' dealers for the agricultural, gardening, forestry, irrigation and zootechnic machinery areas. It is uniformly present throughout the national territory and it gathers together both the local ACMA (Agricultural Machineries' Merchants' Associations) and the individual companies. In between 2016 and 2017 the Association mostly focusses on the enforcement of the Italian law on the agricultural machineries' inspection.

Key figures of the sector

In Italy there are 2,300 dealers. This includes retailers exclusively selling used machinery or only equipment, or systems and equipment for gardening whereas there are no more than 400 dealers handling tractors, equipment and combine harvesters. UNACMA has about 200 members with an aggregate turnover of the 80% of the total. The total number of dealers' employees is about 8,300. In the past 15 years there has been a decrease of 50% in tractors' sales (with the same amounts of dealers!).

According to the data collected by FederUnacoma, the number of new tractors sold in 2016 is 18,341, a decrease of 0.5% compared to 2015. But, this number also includes unsold tractors enrolled during the last three months. There are good reasons for expecting a further decrease in tractor sales in between 2017 and 2018.

Despite of this, in the agricultural market a process of progressive digitization is occurring. The Ministry for Agriculture, Food and Forestry set a target of increasing the use the precision farming from 2% to 10% by 2020.

Activities of the national representative organization

UNACMA continuously deals with the association's members during national fairs, exhibitions and local events. Apart from its role in helping the associates to increase their margins, UNACMA focusses on training and safety. With respect to its training activity, the most important and successful project is the Mech@grijOBS.

The aim of this project is to inform students of the Italian technical institutes about the skills they need to have in order to become professionals of the sector. During the EIMA exhibition, over 600 students and about 30 teachers from several Italian secondary schools participated in the workshops related to the project.

In partnership with INAIL (the National Institution for Insurance against Accidents at Work), UNACMA deals with professional updating courses. The aim of the program is to train the dealers and workshops about the Italian law on the agricultural machineries' inspection.

On October 2016 UNACMA organised the 63rd edition of the CLIMMAR Congress in Venice in which about 80 delegates and 40 accompanying partners from 16 European countries participated.

Further information

UNACMA is partner to ENAMA (Italian Body for Agricultural Mechanization and Engineering, that is acting for the Ministry of Agriculture and its Members as a certification body in the field of agricultural engineering) and CONFCOMMERCIO (the Italian Confederation of enterprises that is very active in lobbying round the institutions).

The association is promoting the establishment of a "GRUPPO MACCHINE" that brings together all the most important associations of the operating machineries' field.

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LTRTA is a voluntary non-governmental organisation, founded in 1999 by 6 members as the industry's business representative. It combines agricultural equipment manufacturers, traders and service providers, professionals and other interested individuals and legal entities in order to promote the development of the sector and to promote mutual cooperation and professional development.

One of the earliest tasks was to lobby regulation for agricultural machinery dealers to establish custom warehouses, because Latvia was not EU and we needed to find advantages and to postpone taxes until the time of sale. Now LTRTA works together with other agricultural NGO to implement EU-rules in national regulations and we follow the legislative amendments in order to promote the agricultural equipment market. LTRTA is active in the technical colleges Advisory Convent together with specialists of the Ministry of Agriculture in order to implement EU laws and regulations and changes in existing law. In collaboration with the Rural Support Service of Latvia, LTRTA is working on rules to get EU funding for agricultural machinery and to improve the tractor driver training and license acquisition system. And in cooperation with Educational Institutions, LTRTA organises competitions for young mechanics.

LTRTA goals and statistics:

- Protect the interests of agricultural machinery manufacturers and dealers – to arranged a clear and comprehensive regulatory framework providing agricultural equipment and service market, where services are provided by a responsible and competent staff, in cooperation with well-informed and equally accountable farmers.
- Improve agricultural material and technical provision and quality of services in Latvia.
- Represent our members in the negotiations in all institutions and organisations that are affecting members' interests – Ministry of Agriculture, Farmers Parliament, CLIMMAR and farmers NGO Advisory Council.
- Number of farmers: 83,386
- Average farm size: 27.2 ha

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	Latvia	LTRTA members
Registered in Register of Enterprises of Latvia	258	30 (11.6 %)
Turnover	€520.8 million	€323.1 million (62.0 %)
Number of employees	1,900	710 (37.4 %)

	2014			2015			2016		
	Used	New	New %	Used	New	New %	Used	New	New %
Tractors	723	332	31.47	914	607	39.91	1342	613	31.36
Combine harvesters	176	125	41.53	208	118	36.20	258	120	31.75
Excavators	232	123	34.65	169	151	47.19	137	86	38.57
Forest machines	51	25	32.89	56	30	34.88	59	28	32.18
Self-propelled loaders	114	123	51.90	101	161	61.45	117	138	54.12
Tractor trailers	120	547	82.01	165	757	82.10	181	708	79.64



Luxembourg (FEMAL)



Key figures and contractor profiles

Fédération des Entreprises du Machinisme Agricole et Industriel du Grand-Duché de Luxembourg (FEMAL), 16 dealers (90% of all established dealers in Luxembourg) with nearly 260 employees.

The profession of the mechanic of agricultural and viticultural machines is determined by the law as activities related to maintenance and repair of agricultural machines, equipment and technical installations of any kind for the agriculture, viticulture, the forestry, the horticulture, the construction of machines, equipment and agricultural installations as well as their accessories and the manufacturing of spare parts related to it.

To be able to work in the profession it is necessary to be a holder of a DAP (Diploma of Vocational Aptitude) after having followed 3 years of professional training (company/school) in an apprenticeship contract in an established company.

In order to be established in the profession the candidate has to make an additional master's degree after 3 years of professional practice in the branch.

The turnover of the whole sector was around 180 millions euros in 2014 with 183 tractors, 16 combine harvesters and 100 other agricultural machines sold in that year.

Most of the retailers are SMEs with around 10 employees. Their enterprises are mostly established in the more rural northern part of the country.

The customers of FEMAL members include: farmers, local authorities, construction enterprises, infrastructures, owners of forests and viticulture which is a traditional and important activity of the eastern region's agriculture.

The number of the agricultural enterprises sinks annually (15-20 firms/year) which naturally has a negative effect on the sale of agricultural machines. The new Plan for Rural Development (PRD) reduces the subsidies for agricultural machines to a minimum: within seven years the maximum of subsidies can now reach 20,000 euros.

These negative tendencies are reflected in the sales of agricultural machines:

	2016	2015	2014	2013	2012
Tractors	160	168	183	229	172
Combine harvesters	4	5	17	12	23
Telescope loader	69	65	126	170	157
Forage harvesters	7	4	2	12	8

Activities of the national representative organisation

2016: Representation of the interests of the members at national and local level, presence at National Agricultural Exhibition of Ettelbruck in June, participation at CLIMMAR Congress in October in Venice, organisation of "Week of Agricultural Machines" in all enterprises of the federation in December.

Projects for 2017: National representation of members in government, organisation of a second-hand market of agricultural machines, presence at National Agricultural Exhibition of Ettelbruck in June, organisation of CLIMMAR Congress in October.

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Fedecom is the Dutch organisation for manufacturers, importers and dealers of agricultural, material handling and construction equipment. It has 960 members and these cover about 85% of the overall sector. Since there is no mandatory (road) registration, exact information on the number of machines sold is not available. Members however participate in a voluntary survey that is published 12 months after the registration date in compliance with European competition rules. The best estimation of the turnover in our sector is €3.5 billion. About 16,500 people are employed. Between 2,500 and 3,250 tractors are sold annually over the last couple of years. The number of farms declined to about 64,000 in 2016 and we have about 2,500 contractors. The contracting business is relatively important, since farmers are getting to be more managers, than (field)workers. They decide on a day-to-day basis whether "to make or buy". Prices for agricultural land are extremely high, on average €57,000/ha.

Fedecom has five departments focussing on:

- Agricultural equipment
- Cattle and dairy farming equipment
- Material handling and industry equipment
- Municipality and turf care equipment
- Horticulture and greenhouse equipment

The mission of Fedecom is to support members in getting stronger business every day. We try to do so in several ways, including lobbying (in politics and governmental bodies), tools (market information and statistics, benchmarking, general business information) and supporting/servicing (promoting exhibitions, education, quality inspection system). Our main goals are: sufficient and qualified employees, security and safety of machinery in use and in traffic, performance improvements of members' business and

promotion/presentation of the business. Through our so-called Fedecom Academy we train new students and experienced workers. An essential part of the Fedecom Academy is the "lifelong support" by our Mentor Plus consultants. They visit over 400 students and their employers six times a year in order to optimize the effect of the training.

With VA-Keur, we have our own certification tool. Even though annual testing is not mandatory in the Netherlands, about 30% of our members are VA-Keur certified and execute over 140,000 inspections annually to improve worker safety and machinery security.

We offer our members several market statistics and since the end of 2016, an anonymous benchmarking tool, where some key performance indicators enable them to benchmark their operations with others.

As Fedecom, we own and organise two mayor national exhibitions:

- AgroTechniek Holland for farming equipment and
- GroenTechniek Holland for turfcare and municipality equipment

Both are outdoor events and are organised intermittent, once every two-years. Both Fedecom members and non-members are participating in these exhibitions. Fedecom has close relationships with other branch organisations including (contractors), LTO (farmers) and GMV (processing industry). On several important topics, we team up to lobby in politics. Like any other branch organisation, Fedecom hosts a number of meetings for its members throughout the year. All interested members will be presented with a lot of valuable information.

President of Fedecom is Erwin Ros. He is managing director of Kamps de Wild Holding, a subsidiary of Royal Reesink. Director of Fedecom is Gerard Heerink.

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Fedecom

PRESIDENT

Erwin Ros



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Big size gives power

This motto promotes the firms which decided to establish the Polish Chamber of Commerce for Agricultural Machines and Facilities (PIGMIUR) in 1998. The motto is still valid. Nowadays, the Chamber constitutes a significant voice in the industry, which takes care about its interests.

PIGMIUR is an independent organisation currently bringing together 76 companies from the sector of agricultural machinery and equipment. It includes all the major domestic manufacturers and distributors of machinery and representatives international brands of agricultural machinery and equipment. The Chambers members have 33 factories in the country and employ 11,200 people. The total annual revenue of these companies in 2015 amounted to PLN 8,750 million.

Industry facts 2016

- In 2016 9,607 new agricultural tractors were registered. 3,489 units less than in 2015 (minus 26.6%)
- 8,952 tractors were of domestic origin and 655 units (11%) were imported
- The sales volume imported used tractors remained almost at the unchanged level in 2016, 12,589 units (186 units less than in 2015)

What are the reasons of this difficult market situation?

The Polish industry of machines and facilities is still strongly dependent on the external financing, in particular on the EU subventions. At present, the entire industry waits for a mobilisation of the funds from the subsequent Rural Development Programme 2014-2020. The farmers suspend investments, wait for considering their applications. It has been also influenced by the process of the agricultural products, in that in particular low buying-in milk prices, what has contributed restricting the investments from the own funds.

Exhibitions

Mazurskie AGRO SHOW (Mazurian AGRO SHOW)

The hall exhibition of the agricultural machines, which has been organised since 2015 in Ostróda (northern Poland) with 200 exhibitors, 40,000 visitors and 37,000 m² of total exhibition area.

Zielone AGRO SHOW (Green AGRO SHOW)

Dedicated to the cattle breeders and dairy farmers with demonstrations and over 150 exhibitors, 35,000 visitors, 15,000 m² of exhibition area (total area of 45 ha).

AGRO SHOW

AGRO SHOW is the largest outdoor agricultural exhibition in Europe that has been organised since 1999 with over 900 exhibitors (100 from abroad), 150,000 visitors and 150,000 m² of exhibition area.

Education & Training

- MECHANIK NA MEDAL (PERFECT MECHANIC) – the contest intended for the employees of the services of agricultural machines and facilities.
- MŁODY MECHANIK NA MEDAL (PERFECT YOUNG MECHANIC) – the contest intended for the students of the agricultural schools, who plan their future with a profession of a mechanic for agricultural machines.
- SERWIS NA MEDAL (PERFECT SERVICE) – the contest, which is aimed at designating the best servicing points in Poland and improving quality of service in the servicing points within the whole area of Poland.
- ACADEMY OF COMMERCE AND MANAGEMENT – the training project intended for the members of the Chamber within the frames of which are conducted trainings for the employees of the commercial departments and for the middle- and to-level management.

NAME

Polish Chamber of Commerce of Agricultural Machines and Facilities

PRESIDENT

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- FIRM FRIENDLY FOR AGRICULTURAL EDUCATION – an objective of the project is to deliver current and modern training materials prepared by the firms associated in the Chamber to the schools.



AGRION – the Slovak Association of Agricultural Technology Suppliers

AGRION – the Slovak Association of Agricultural Technology Suppliers was established in 1994. It connects 50 of the most important importers, sellers and manufacturers of agricultural machinery. Members of the association have approximately 800 employees.

In 1995 we started organizing a practical demonstration of agricultural machinery, where farmers got the opportunity to compare how individual technological lines work. The event, called the Fodder Plant Field Day, was organized in Central Slovakia and has taken place every year since then. The event is hosted by members of the only faculty in Slovakia specializing in agricultural machinery and also includes an expert workshop. The aim of the event is to present the work of various technological lines to farmers. The Fodder Plant Field Day is regularly attended by more than 20 companies, which present approximately one hundred machines altogether. The event is attended by around a thousand farmers.

Another important event is the Maize Field Day, which is organized in September. The autumn date provides the opportunity to present technologies used for maize harvesting, tillage and plant protection. In addition to the commented presentation of machinery, the event also includes a display of approximately 150 maize hybrids from world-class seed companies.

AGRION has long been taking part in the organization of AGROKOMPLEX, a trade fair for agricultural machinery that has taken place every August since 1974. AGRION also initiated the establishment of a specialized trade fair for agricultural machinery called AGROSALÓN, which has been held biannually since 2006.

The association's newest activities include the preparation of a new secondary school study programme entitled AGRO-MECHATRONICS. This new modern specialization is based on recent findings

from the area of agricultural machinery. The content of the study programme is supervised by the member companies of AGRION themselves. Their duties include retraining teachers, providing educational documents, lending machinery to schools as well as helping provide practical experience. The new secondary school study programme was created in record time, partly thanks to the approach of state institutions and schools themselves. The first students will start with the programme in three select schools as soon as September 2017.

The aim of the AGRION secretariat is providing the members of the association with information about tractor sales, aid for machinery purchases and educational activities. We publish approximately 40 fact sheets with these overviews annually.

AGRION organizes a wide range of activities, which is why in recent years there has been a steady increase in the number of members who are interested in our services and presentation activities.

Information about Slovak agriculture

Agricultural land	1,9 mil. hectares
– arable land	1,35 mil. hectares
Number of employees	52,000
Number of farms	24,473
– legal entity	2276
The average area of farms	80 hectares
The average area of legal entity	695 hectares
Value of agricultural production	1960 mil. eur
– crop production	1124 mil. eur
– animal production	836 mil. eur
Sales of tractors over 50 HP (2016)	779

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About MaskinLeverantörerna (ML)

Established in 1948

ML today consists of six different sectors. The member companies are suppliers or dealers for: Construction equipment, Forklifts, Forest machinery, Road maintenance equipment, Agricultural machinery or professional Lawn and Garden equipment.

The agriculture sector in ML has 77 dealer members and 47 importers and manufacturer members. (figures from January 2017). ML has approximately 90 % representation in the total agriculture sector in Sweden.

ML is a forum for cooperation and exchange of experience, and a body for acting in common questions in the trade. The focus lies on developing general terms of supply and counselling regarding these, compiling statistics and coordinating national trade fairs in the best interest of the members.

The daily work is run from an administration located in Stockholm.

Activities in MaskinLeverantörerna (ML) in 2016

In the beginning of June ML organised it's first own national exhibition for mobile machines where only members of ML were allowed to exhibit: "Svenska Maskinmässan". The exhibition was held at Solvalla horse race track just outside of Stockholm. The exhibition was very appreciated by both exhibitors and visitors and attracted about 12000 visitors.

Another big exhibition in 2016 for ML members was the agriculture fair "Elmia Lantbruk" (Elmia Agriculture). This fair was held in October in Jönköping in the south of Sweden and attracted almost 20,000 visitors. This time all sectors of Sweden's agricultural industry were present. A bigger and more complete exhibition than before.

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Key sales figures in Sweden

	2015	2016
Tractors	2681	2965 (+11%)
Combine Harvesters	195	216 (+11%)
Seeding machines	423	468 (+11%)
Round Balers	275	294 (+7%)
Ploughs	462	413 (-11 %)
Turnover for the member companies (dealers)	9,295,000,000 SEK = 981,238,000 €	-





Agrotec Suisse, the association of the Swiss agricultural machinery business

Agrotec Suisse is the Swiss association of agricultural machinery companies. It counts over 600 members and is part of the umbrella organisation AM Suisse. Agrotec Suisse is responsible for the technical education of agriculture, construction and garden machinery mechanics as well as the farriers in the area of basic, further and higher education. In addition, Agrotec Suisse provides a large amount of services in the field of occupational safety, economics, nature of expertise and the legal service. The Swiss agricultural machinery branch of trade is rather small-structured compared to many European countries. Only 20% of Agrotec Suisse member companies employ more than 10 people. In 2015 our approximately 600 members employed around 4,800 people and had 1,200 apprentices. Members are specialised agricultural machinery dealerships, agricultural machinery traders and importers with their own distribution bases in the fields of agricultural and communal machinery as well as garden machinery equipment. Many companies are doing additional activities in other related fields.

A brief history of AM Suisse

In 1891, the Swiss Association of Forges and Wainwrights was founded, shortly before the Swiss Association of the Locksmiths. 1972 they merged to the Swiss Metal Union. Since then, the interests of the agricultural, metal construction and farrier industries have been perceived by a joint umbrella organisation. For over 125 years, the work of the association was dominated by the core themes of business management, vocational education and lobbying. In 2016 the association got the new name AM Suisse. Today it represents the interests of some 1,900 member companies and their 22,000 employees. They generate a turnover of CHF 5 billion and educate more than 4,300 apprentices.

This year, AM Suisse invests about CHF 10 million in the extension of the educational centre in Aarberg.

Structures of the agriculture

Swiss agriculture is characterised by its diversity. The branches of production range from agriculture to milk and livestock farming (including alpine farming) to specialised crops such as wine and fruit growing. Actually, Switzerland still counts almost 53,000 farms in the Swiss plateau region as well as in the mountains. The average farm size is almost 20 hectares. The wages and costs in Switzerland are at a very high level. The environmental and animal welfare regulations are the strictest worldwide and the level of agricultural mechanisation is relatively high. Contractors do an increasing share of agricultural work.

Swiss agricultural machinery market

Switzerland is also often referred to as a country of milk. Thus, animal husbandry is an outstanding element in Swiss agriculture, characterised by family farming businesses. The investments in technology for livestock management makes up a substantial part of the industry. Swiss milk producers are increasingly investing in automatic systems: more than 600 milking robots are already in use. The importance of livestock production is also reflected in the market volume green line machinery, which was around 4,300 units in the 2015/16 season. With some 2,200 units, the market for agricultural tractors fell by 13% in 2016 compared to the previous year. 50% of the tractors sold are in the segment between 100 and 140 hp, 30% in the range under 100 hp and 20% over 140 hp. The structures in Swiss agricultural machinery dealer networks are subject to increasing dynamism. The traditional role division between importers, dealers and, in some cases, customers is constantly developing. There is a noticeable trend towards larger and more professional structures.

NAME

Agrotec Suisse
A professional association of AM Suisse

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Machinery Association

The British Agricultural and Garden Machinery Association (BAGMA) supports thousands of independent agricultural, garden and groundcare machinery dealers across the UK providing support and services to industry.

BAGMA's heritage goes back to its 1917 inception as the National Association of Agricultural Engineers and Implement Dealers, becoming BAGMA in 1972. In 2017 BAGMA celebrates its 100th anniversary as a trade association. BAGMA represents the interests of its members and industry as a whole by campaigning to improve the trading conditions for dealers within the UK by working together with other industry partners and various government departments. BAGMA has over 600 members representing over 750 outlets in agricultural machinery, garden machinery and groundcare equipment.

The UK Land-based Engineering Sector has over 3000 dealers with in excess of 25,000 staff in an industry sector that is worth over £4 billion a year (Euro 4.8 billion). There are approximately 1200 agricultural machinery dealers with 700 having tractor franchises.

One of the main roles of BAGMA over the many years has been to ensure that new people are drawn into the land based industry sector and that they have access to training and apprentice programs to ensure that they are fully trained to meet the developing technology that our industry uses, enjoys and benefits from. To this end BAGMA works with industry and the education system to ensure that there is always new talent coming into industry and that the existing talent has a clear career pathway to follow.

BAGMA has developed a number of industry specific training courses and provides training on these courses for around 450 technicians and sales people a year through BAGMA appointed training providers and partners.

Go to <http://bagma.com/training/>

UK Industry Key Facts

- BAGMA have 650 members, agricultural and garden machinery dealers
- BAGMA members represent over 1.2 billion pounds of UK sales
- UK Sales of agricultural equipment is estimated at over 4 billion pounds
- 1200 Agricultural Machinery Dealers
- 703 Tractor Franchised dealers representing 15 brands
- 1000 Garden Machinery Dealers
- Over 25,000 employees
- 10,000 technicians (40% of dealers staff)

BAGMA has a Council of Representatives who deal with strategic issues and a BAGMA Connect Group who deal with daily industry issues and provide the connection between BAGMA and its members in a proactive and a constructive way using social media and regional meetings.

UK Farming Facts

- Farmed area represents 70 % of land in the UK
- UK utilised agricultural are 17.2 million hectares
- Total available agricultural area 18.4 million hectares
- Average farm size 77 hectares
- 36 % crops
- Sheep and lambs 32 million
- Pigs 4.5 million
- Dairy cattle 4.5 million
- Cereal crops 3.1 million hectares (wheat 2 million hectares)
- Oil seed rape 756 hectares

Figures above from 2015

The UK produces less than 60% of the food it eats. Although agricultural activity occurs in most rural locations, it is concentrated in East Anglia (crops) and the South West (livestock). Of the 212,000 farm holdings, there is a wide variation in size from under 20 to over 100 hectares. There are approximately 58,000 people engaged in UK farming.

UK Machinery Sales

Tractor registrations in the UK of over 50hp units have fallen in the last ten years from just over 17,000 to just over 10,600 in 2016. Average registered horsepower's have increased to just under 160hp in 2016. Combine sales have averaged around 800 in the UK but have seen a

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peak in 2015 of 1250 and lower numbers in 2016 of around 650.

Consolidation of agricultural machinery dealers is still an issue in the UK with the number of companies reducing but outlets remaining the same.

Garden machinery and groundcare machinery sales have been in the region of £550 million (Euro 660 million) per year. Domestic trends are showing an increase in robotic mower sales and an increase in battery powered hand held tools with development toward battery power in larger machinery.



Conclusions from the 63rd CLIMMAR Congress – 20 to 23 October 2016

During the 63rd edition of the annual CLIMMAR congress held in Venice (Italy) from 20th to 23rd October 2016, 16 national dealer associations discussed about the future of agricultural dealer organisations. With difficult market conditions, continuing reorganisations of distribution channels and new upcoming European RMI regulations, the landscape remains to be very challenging.

The 63rd congress was organised by Italian member association, UNACMA. All in all 70 participants including delegates from dealers all over Europe as well as various speakers shared their conclusions and worries about their national markets. A special welcome was given for the representative of the China Agricultural Machinery Distribution Association (CAMDA), who joined the congress in Venice as a possible prelude for CLIMMAR membership.



Low commodity prices put stress on distribution channels

Low prices for commodities like milk, meat and arable products have led and are still leading to lower incomes for farmers throughout Europe resulting in lower demands for new tractors and new machinery. In Germany for instance, LandBauTechnik-Bundesverband reports an average downturn in the market leading

to lower dealer margins and uncertainty. Globals like f.e. John Deere decreased the number of authorised dealers from 60 to under 40 and AGCO (Fendt) and Claas force large dealer companies to choose a single and exclusive brand strategy. We estimate that cooperatives like f.e. Agravis and BayWa service up to 50% of their regional markets. Germany currently has 500 tractor dealers for the most important 8 brands. British BAGMA sees AGCO and New Holland dealers going out of business whilst others put (renewed) effort in garden and grounds care machinery. There are 25 John Deere dealers (down from 40) and 11 Claas dealers with 22 outlets, partly owned by Claas. The overall agricultural machinery market in 2016 has gone down by 20%. The devaluated English Pound offers chances for exporting used machinery. French SEDIMA sees the number of private dealerships increasing. Agricultural dealers no longer grow

regionally, but nationally and new companies build new distribution channels. One example is Groupe Dubreuil who is active with car dealerships, petrol distribution and airline transport and has bought several successful Case IH and New Holland dealerships, now owning 23 outlets. In both Italy and Sweden several tractor and machinery manufacturers have started with direct sales. In Italy, multiple manufacturers (like MaterMacc and Goldoni) are now owned by Chinese manufacturers. One of the largest New Holland dealers quit business with other brands filling the

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gap. New European distribution models are becoming effective.

Despite of the market conditions stabilising again, Danish Dansk Maskinhandlerforening is experiencing turmoil in dealerships. Several brands including AGCO, Claas, John Deere and Väderstad reorganise their distribution channels both severely and rapidly. One third of the AGCO dealers is gone and LMB Danmark A/S took over the Claas importership. Most striking is the new strategy of John Deere, that transfers the complete importer and dealerships to Semler Gruppen, the importer of Volkswagen Group.

Alike the bigger countries, smaller markets also suffer from severe market conditions. Belgian Fedagrim speaks of a downturn of 15% and also in Luxembourg sales are down dramatically. Tractor sales decreased from 229 in 2013 to 124 until October 2016. Combine sales are down from 12 (2013) to 4 and forage harvesters are down from 12 (2013) to 2 units in 2016 so far. Grey import of new tractors and machinery is causing increasing problems in most European countries. Austrian association ARGE reports one third less tractor registrations in 2016 so far. More worrying is the average gross profit of dealer companies of only 1.9%. A striking 34% of the dealers is making a loss on operations.

CLIMMAR will continue to lobby and advocate for the interests of dealer companies throughout Europe and continue to carry out the necessary activities to help creating optimal conditions for them.

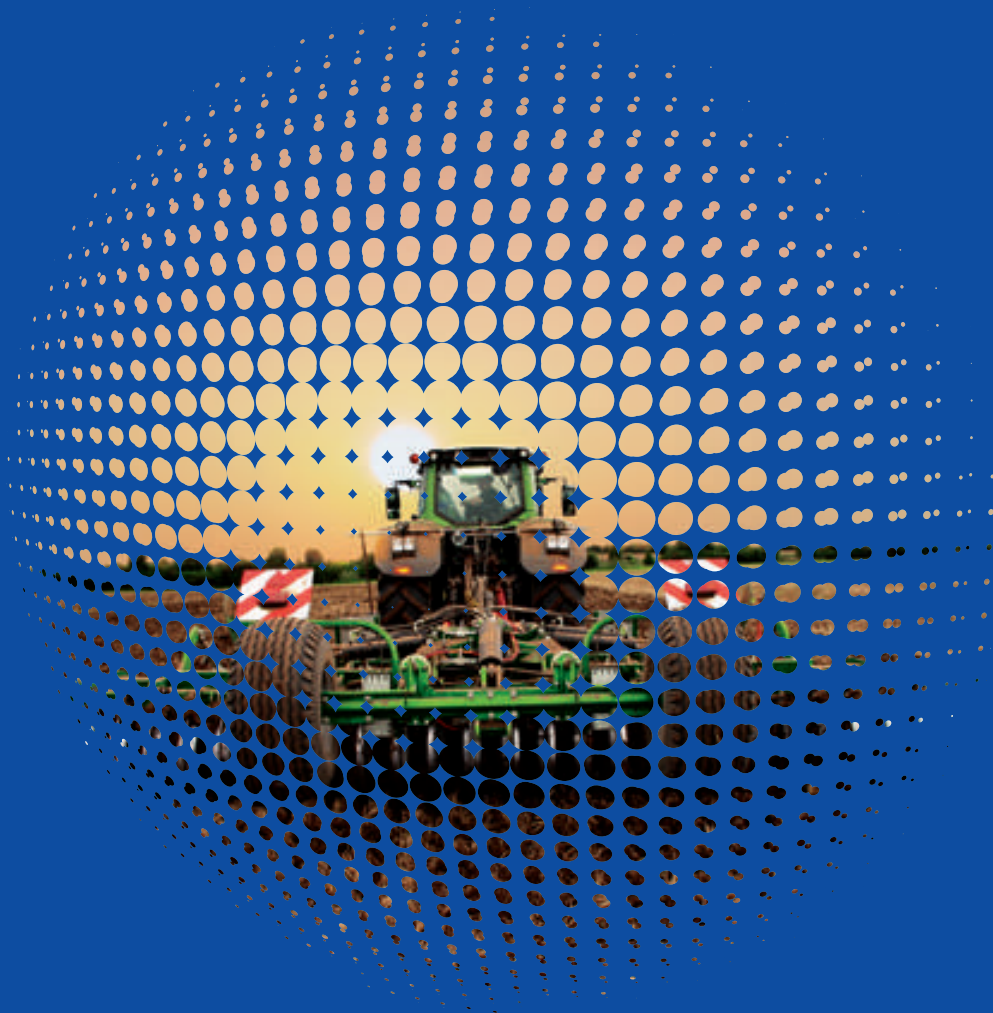
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CLIMMAR congresses through the years

Once a year, CLIMMAR members gather for the annual congress in one of the members' countries. The first edition of the congress was held in 1953 in Paris, France and the most recent congress took place from 20 to 23 October 2016 in Venice, Italy. The 2017 edition is scheduled for 5 to 7 October in Luxembourg city. The national branch organisation Fédération des Entreprises du Machinisme Agricole Luxembourgeois (FEMAL), is responsible for the organisation of this 64th CLIMMAR congress.

The congress is not only one of the highlights in the activities of CLIMMAR, it also plays an important role in determining the strategy and activities of CLIMMAR as a branch organisation and the activities of the various working groups. During the congress relevant international subjects are addressed with the objective of enhancing the sharing of experiences, developing innovative techniques in the management of the distributors and applying modern technology in agricultural mechanisation. Both internal as well as

eminent external speakers and guests pay their attention to the congress. The 2016 edition in Venice attracted 70 participants including delegates from dealers all over Europe as well as various speakers. A special welcome was given to the representative of the China Agricultural Machinery Distribution Association (CAMDA), who joined the congress as a possible prelude for the CLIMMAR membership.

In chronological order the CLIMMAR congresses took place in:

1953 – **Paris** (France)
1954 – **The Hague** (The Netherlands)
1955 – **Vienna** (Austria)
1956 – **Zurich** (Switzerland)
1957 – **London** (Great Britain)
1958 – **Verona** (Italy)
1959 – **Bad Godesberg** (Germany)
1960 – **Copenhagen** (Denmark)
1961 – **Grand Duchy** (Luxembourg)
1962 – **Paris** (France)
1963 – **The Hague** (The Netherlands)
1964 – **Vienna** (Austria)
1965 – **London** (Great Britain)
1966 – **Berlin** (Germany)
1967 – **Rome** (Italy)
1968 – **Paris** (France)
1969 – **Amsterdam** (The Netherlands)
1970 – no congress
1971 – **The Hague** (The Netherlands)
1972 – **Hertenstein-Weggis** (Switz.)
1973 – **Rottach-Ergern** (Germany)
1974 – **Vienna** (Austria)

1975 – **Edinburgh** (Great Britain)
1976 – **Brussels** (Belgium)
1977 – **Palermo** (Italy)
1978 – **Obernai** (France)
1979 – **Amsterdam** (The Netherlands)
1980 – **Dublin** (Ireland)
1981 – **Lisbon** (Portugal)
1982 – **Munich** (Germany)
1983 – **Appenzell** (Switzerland)
1984 – **Salzburg** (Austria)
1985 – **Dijon** (France)
1986 – **Maastricht** (The Netherlands)
1987 – **Porto** (Portugal)
1988 – **Athens** (Greece)
1989 – **Grand Duchy** (Luxembourg)
1990 – **Locarno** (Switzerland)
1991 – **Ostend** (Belgium)
1992 – **Cologne** (Germany)
1993 – **Vienna** (Austria)
1994 – **Troyes** (France)
1995 – **Copenhagen** (Denmark)
1996 – **Amsterdam** (The Netherlands)

1997 – **Swindon** (Great Britain)
1998 – **Stockholm** (Sweden)
1999 – **Grand Duchy** (Luxembourg)
2000 – **Venice** (Italy)
2001 – **Brno** (Czech Republic)
2002 – **Budapest** (Hungary)
2003 – **Lisbon** (Portugal)
2004 – **Dublin** (Ireland)
2005 – **Morat/Murten** (Switzerland)
2006 – **Berlin** (Germany)
2007 – **Brussels** (Belgium)
2008 – **Neudorf/See** (Austria)
2009 – **Avignon** (France)
2010 – **Krakow** (Poland)
2011 – **Edinburgh** (Great Britain)
2012 – **Kolding** (Denmark)
2013 – **Rotterdam** (The Netherlands)
2014 – **Riga** (Latvia)
2015 – **Stockholm** (Sweden)
2016 – **Venice** (Italy)



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