



CLIMMAR MAGAZINE

2018





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Marchands de Machines Agricoles et Réparateurs**

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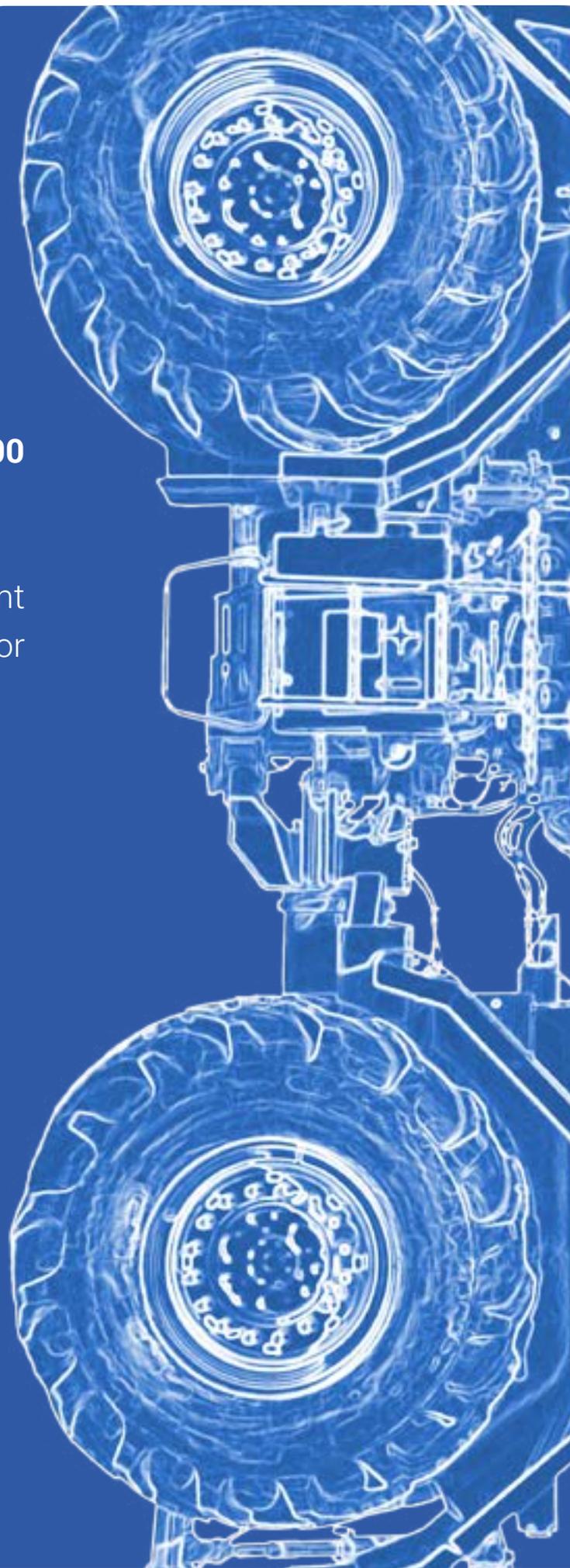
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Welcome to CLIMMAR!

The New Year for CLIMMAR already began at last years' congress where we put a mark on the horizon together: "Dealer 2030". If we see the changes expected to come towards us and consider that the year 2030 is only 12 years away, we realise how fast our industry has to develop and innovate.

Just a few years ago, there were only a couple of large hotel organisations that operated worldwide and nobody had ever heard of Airbnb... Now, all of a sudden, hotel organisations struggle in their "fight" against "startup" Airbnb. It has rapidly become the world's largest organisation in offering, or rather facilitating, accommodation without owning a single hotel room or apartment! It's not my intention to forecast similar developments for our industry, but it surely is important to keep an open-minded view towards new opportunities. Also a few years ago, the discussion on RMI (Repair & Maintenance Information) surfaced and during the last years we have been working hard to get this law in place in the best possible way for our members and dealers. Now we see that open access to RMI is anchored in European Law and this means that we can keep our promise to our customers to guarantee servicing his tractors and machines even if manufacturers decide to merge or change their distribution channels.

"It is neither the strongest one that survives nor the most intelligent, but the one that is most adaptable to change."

In the Dealer 2030 discussion, increasing problems in the relationships between dealers and manufacturers were put high on the agenda. The gap between the

global view of manufactures and the local focus of dealers, is getting bigger and bigger. Contracts between dealers and manufacturers are nowadays orchestrated by law firms. They don't like uncertainties and see no reason to keep in mind the investments, in time and money, done by dealer organisations. This results in contracts without the right balance. CLIMMAR wants to work together with manufacturers to create a better understanding about each other's positions and set up basic guidelines for a mutual win/win contract.

Nowadays, every organisation in our sector talks about Smart Farming. It's not a matter of finding new technologies, but of integrating them in our life and businesses without making it (too) complicated. The Big Data development could speed up significantly, if all parties understand the importance of open access to data. Manufacturers as well as farmers seem to prefer to keep their data proprietary. I believe that this has to do with the fear of the unknown. Earlier on, it was quite common to share information (data) in groups, study clubs, books and organisations. And common funding was made available to develop our businesses together. Big Data makes this possible in a much easier way and even much faster. This brings me back to the words of Charles Darwin: "It is neither the strongest one that survives nor the most intelligent, but the one that is most adaptable to change."

Erik Hogervorst
President of CLIMMAR



PRESIDENT
Erik Hogervorst



SECRETARY-GENERAL
Jelle Bartlema



VICE-PRESIDENT
Ludger Gude



VICE-PRESIDENT
Joost Merckx

CLIMMAR future agenda and position papers

The fit for the future dealer, “Dealer 2030” as CLIMMAR calls him or her, knows how to connect with the customer by presenting excellent service, the best advice on new techniques, and the best machines to do the job. Whether he does this in a full line brand concept, or with a multi brand customer specific product line, is less relevant. In the end, the customer will decide what the best solution is for his requirements.

During the annual CLIMMAR congress in Luxembourg in 2017, eight themes or rather trends were recognised that will have major impact on the (near) future dealer businesses. Each trend calls upon CLIMMAR for specific action points:



<p>1. Collaboration: urgent requirement to improve collaboration between manufactures and dealers</p>	<p>CLIMMAR action point 1:</p>	<p>jointly develop dealer contracts that better respect dealers' interests like exclusivity, termination terms, compensation and good will</p>
<p>2. Smart Farming: enable better and stronger facilitation of Smart Farming by dealers towards farmers and contractors</p>	<p>CLIMMAR action point 2:</p>	<p>play a crucial rol in European smart farming, join forces and set up a platform with farmers association COPA/COGENA, contractors association CEETTAR and manufacturers association CEMA</p>
<p>3. Big Data: elaborate on the opportunities of Big Data to improve crop yields and business operation and efficiency by open data sourcing and exchange</p>	<p>CLIMMAR action point 3:</p>	<p>support and co-develop a code of conduct for open data exchange with COPA/COGENA, CEETTAR and CEMA</p>
<p>4. Service level qualification: standardise dealer service levels on a European scale</p>	<p>CLIMMAR action point 4:</p>	<p>study the introduction of a CLIMMAR Quality Service Standard for all dealers</p>
<p>5. Profitability used equipment: increase the profitability of (international) trading used tractors, machinery and equipment with a focus on high spec electronic features</p>	<p>CLIMMAR action point 5:</p>	<p>develop and initiate new business models to increase the value of used equipment and to upgrade/retrofit machinery to today's features</p>
<p>6. 24/7 on demand service: act upon the growing interest from contractors and large famers for machinery and specialised service on demand.</p>	<p>CLIMMAR action point 6:</p>	<p>develop new business models for machinery on demand, 24/7 service on demand and agronomic services and create awareness amongst member associations</p>
<p>7. Competent organisation: attract young mechanics and other talents and retain qualified and competent employees</p>	<p>CLIMMAR action point 7:</p>	<p>support and initiate initiatives and activities on education and training to promote the sector and its jobs</p>
<p>8. Collaboration in EU: search for collaboration and cooperation with European organisations that help the agricultural sector forwards and strengthen the position of dealers</p>	<p>CLIMMAR action point 8:</p>	<p>work together with COPA/COGENA, CEETTAR, CEMA and other organisations on relevant trends and lobby issues, issue position papers and exchange mutual interesting statements and documents</p>

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.

Working group “Data & Service”: Data from Europe for the members



Working group 2 “Data & Service” is open for all CLIMMAR members since 2017

In 2014, CLIMMAR Working group 2 “Data & Service” was founded, chaired by Germany. Working group 2 cut down the previous survey system concentrating onto basic themes:

1. Basic national markets data:

number of dealers, employees, tractor sales , etc.

2. Current branch trends: how was it, how will it develop? A quick check for 10 key items like turnover, costs, investments

3. Average dealer data from national members: average turnover per dealer, margins, costs, wages, etc.

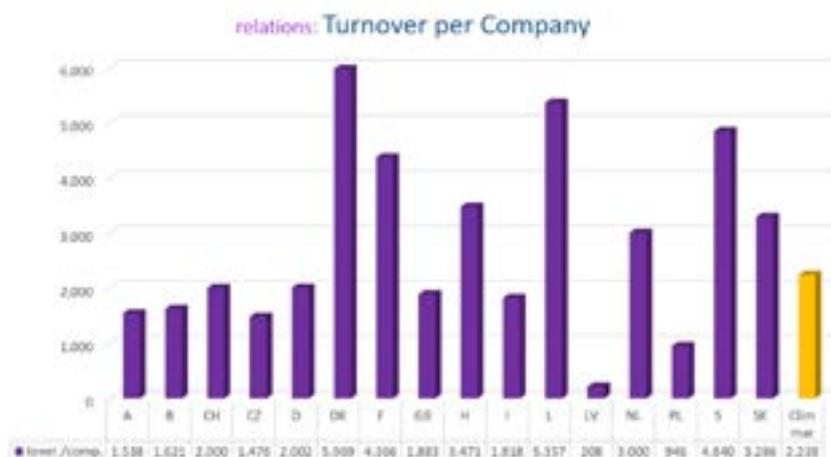
4. Warranty conditions: detailed overview of the most important brands

In order to make things easier, we distinguish between questions that are obligatorily to answer and questions that can be answered optionally. All (100%) members meanwhile participate in the survey, and in 2017 88% of the obligatory questions were answered and 49% of the optional ones. Some member countries implemented CLIMMAR’s questions in the national task area for the first time. This means that CLIMMAR figures become more and more relevant.

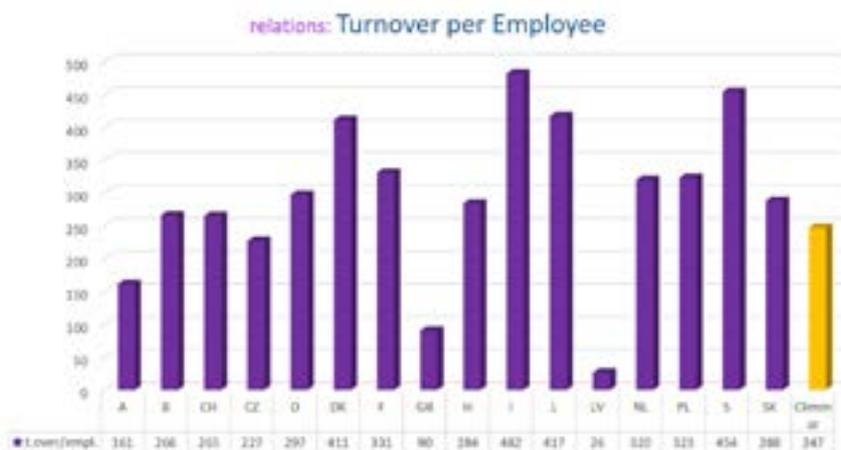
At the annual congress, Working group 2 gives a short overview of the current results is given after which all CLIMMAR-members get the full results. Below you’ll find just a short overview of the results from all four above mentioned survey parts.

I: Basic national markets data

We compare basic structures and from that relations between countries with that we create a European average. Two examples:



An (imaginable) average dealer company in one of the 16 CLIMMAR member countries creates an annual turnover of €2,238,000. The largest national averages can be found in Denmark, Luxembourg and Sweden.



The average turnover per employee is €247,000.

2: Current branch trends

The current branch trends are presented in a table, on a map of Europe and finally as an index. The question always is the same and in comparison with the year before. Were the conditions and developments better, equal or worse? We distinguish between different areas of interest including sales of new and second-hand equipment, workshop sales and parts sales as well as costs, employees, stock levels and investments.

As this relates to national results only, we developed the so-called index view in order to describe the situation in Europe. For that purpose, every "plus" and "minus" is weighted depending on the country the data and sentiment is coming from. This results in an index for the branch trends in Europe (CLIMMAR members only). How was the sentiment and how is it expected to develop in the following period?

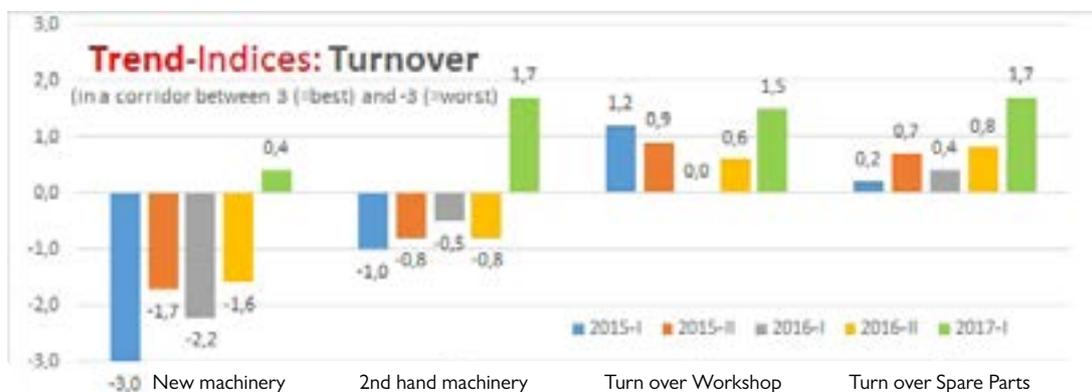
Currently, Working group 2 is busy in defining a specific "CLIMMAR index" that shows in one figure how the branch looks and feels like – all over Europe.

I. Comparison to same period last year: January - June 2017			
	- (minus / worse)	= (equal)	+ (plus / better)
A. Turnover total	A, F, NL	B, CH, CZ, I, PL, S	D, DK, H, L, LV, SK, UK
A.I Turnover Machinery	A, F, NL	B, CH, D, PL, S	CZ, DK, H, I, L, LV, SK, UK
A.I.1 New machinery	A, F, NL, S	B, CH, D, I, PL	CZ, D, DK, H, I, LV, SK, UK
A.I.2 Second hand	NL	A, B, CH, CZ, F, LV	D, DK, H, I, L, PL, S, SK, UK
A.II Turnover Workshop	NL	A, B, CH, H, I, LV, UK	CZ, D, DK, F, L, PL, S, SK
A.III Turnover Spare Parts	NL	CZ, CH, DK, I, LV, S	A, B, D, F, H, L, PL, SK, UK
B. Costs		A, CZ, F, NL, PL, UK	B, CH, D, DK, H, I, L, LV, S, SK
C. Employees		A, B, CH, CZ, D, I, LV, NL, PL, S, UK	DK, F, H, L, SK
E. Stock	D, F, UK	A, B, CH, CZ, H, I, L, NL, S	DK, LV, PL, SK
F. Investments	A, I	CH, CZ, D, DK, F, NL, PL, S, SK	B, H, L, UK

Is the development of turnover and other criteria in the first half of 2017 better, equal or worse compared to the first half of 2016?



Has the overall turnover in CLIMMAR member countries improved (green), stabilised (grey) or decreased (red)? Comparison of overall turnover in the first half of 2017 compared to the same period in 2016.



Turnover development of the last couple of years divided in six months. In the first half of 2017, new machinery sales rose for the first time again. Others: 1.7% for second hand equipment, 1.5% for workshop turnover and 1.7% for parts.



Dealers' expectations mostly became true. For half year 2017/I (green) they first time expected increasing turnover. For 2017/II (blue) they expect quite a bit more.

3: Average dealer data

This statistic is the most complicated one as several members aren't able or willing to give the answers CLIMMAR is asking for, but it improves every year. As an example, the average income of an average mechanic in the workshop is presented. This is from an employer's point of view which includes all social costs.



4: Warranty conditions

Finally, CLIMMAR wants to compare warranty conditions of the most important tractor brands, compared in detail on about 10 aspects, country by country. There are a lot of differences to be seen... Ask your national associations' offices: they have the current conditions from these brands and countries.

All in all, CLIMMAR-Working group 2 meanwhile is quite satisfied with the members work, regarding both: quality and quantity.

	A	B	CH	CZ	D	DK	F	GB	H	I	L	LV	NL	PL	S	SK
JD	x	x	x		x	x	x				x	x				
NH	x	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
CASE	x	x	x		x	x	x					x				
Valtra	x		x		x	x	x					x				
Fendt	x	x	x				x					x				x
Kubota			x		x		x				x					x
Landini	x						x									x

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Education and training: a very important topic for CLIMMAR



All CLIMMAR member countries have a strong focus on employment, education, training and recruitment. The commitment of CLIMMAR in these subjects is also strong and the promotion of our jobs is one of the most important files for each country, in order to attract and bring young people to the profession. This is the key for the future, and that is why CLIMMAR is also involved in the WorldSkills competitions, and particularly in Europe for the EuroSkills held every two years.



Even before joining the organisation of EuroSkills, that promote the profession of agricultural machinery mechanics and technicians, the CLIMMAR Skills had shown the aim to create a European platform for vocational training. Two editions took place before joining WorldSkills Europe for a larger information.

The first CLIMMAR Skills were held in Switzerland in June 2008. The second were held in The Netherlands within the framework of the open-air trade fair AgroTechniek Holland in September 2010. Then, 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. The last edition was also featured in the previous edition of the CLIMMAR magazine.

The aims of this scheme are various. 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 first forum on education and training in 2008 where we talked about the way each country was organising the promotion of 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, what is most difficult is to get the population and the general public to take an interest in agriculture, and particularly in the jobs linked to agriculture 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 another.

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, AGRIBEX and EIMA, but also during agricultural weeks or fairs such as SIA in Paris. For example, after such an event in France, the number of young people entering vocational training in agricultural machinery increases.

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.

Recruitment is a big preoccupation for the dealers in all countries. The strong relations between training centres and dealers are key for a better work together and for a good promotion of our jobs. We need to open our dealerships to the youngsters and to mention that our jobs are evolutive, creative, done with passion, autonomy and with a lot of contacts with the customers.

Following programme

At the end of the competition in Gothenburg, 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 bigger types of machines. The next EuroSkills competition will take place in Budapest, Hungary from 26-28 September 2018 and in 2020, the Austrian city of Graz will host the event.

Working group DSI: European dealers evaluate their relationships with tractor manufacturers

The DSI (Dealer Satisfaction Index) originates from France where it was initiated in 2005. The year after, France presented it at the CLIMMAR Congress and in 2011, the first European CLIMMAR DSI was established. This was when the association decided to open out the French survey to the CLIMMAR member countries.

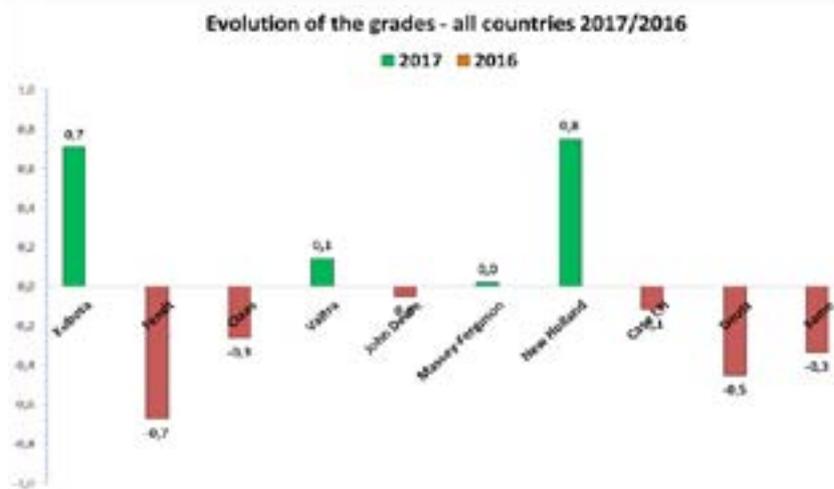
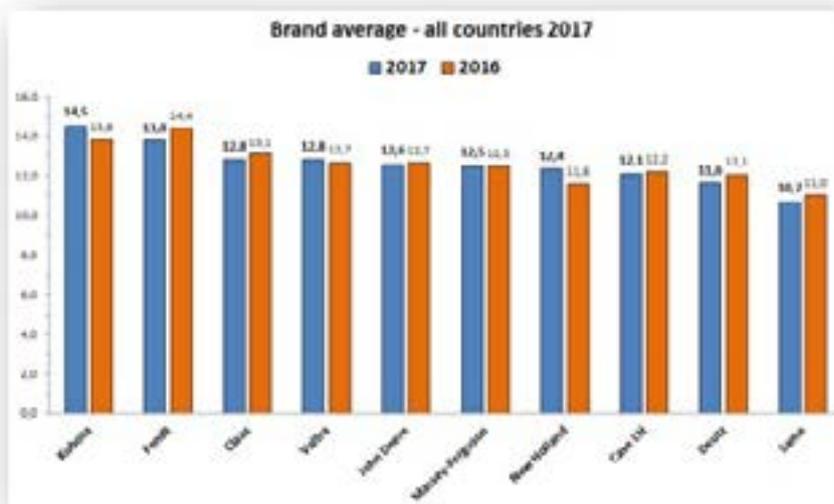
The aim of the DSI survey and its publication is improvement of the relationships between tractor dealers and tractor manufacturers and for the benefit of the concerned networks and brands. This benefit is at the European level. In 2017, eight countries realised the same survey at the same time and with exactly the same conditions: Belgium, Denmark, France, Germany, Italy, Poland, The Netherlands and the United Kingdom.

Last year, the DSI Working group of CLIMMAR conducted by France, decided to execute the survey completely online and this was quite a challenge for all countries. A questionnaire with more than 60 points was filled out online by 1,160 dealers throughout Europe. In 2017, CLIMMAR decided that a brand could not present in the European result if it is not present in at least four countries.

The answers to the questionnaire show the feeling of each dealer, at a precise date, on his relation with his tractor manufacturer. The weak or strong points that appear show the relation between dealer and manufacturer, but do not show the value of a brand or a network for the customers.

At the last CLIMMAR congress in Luxembourg, October 6, 2017, Anne Fradier, Sedima General secretary, and head of the DSI Working group from CLIMMAR, revealed the results of the 2017 DSI survey.

Brand average of the 2017 DSI survey



Compared to last year, Kubota has taken the first place in front of Fendt. Same remains at the bottom of the ranking. We can see the great progression for Kubota and New Holland and the significant decrease for Fendt.

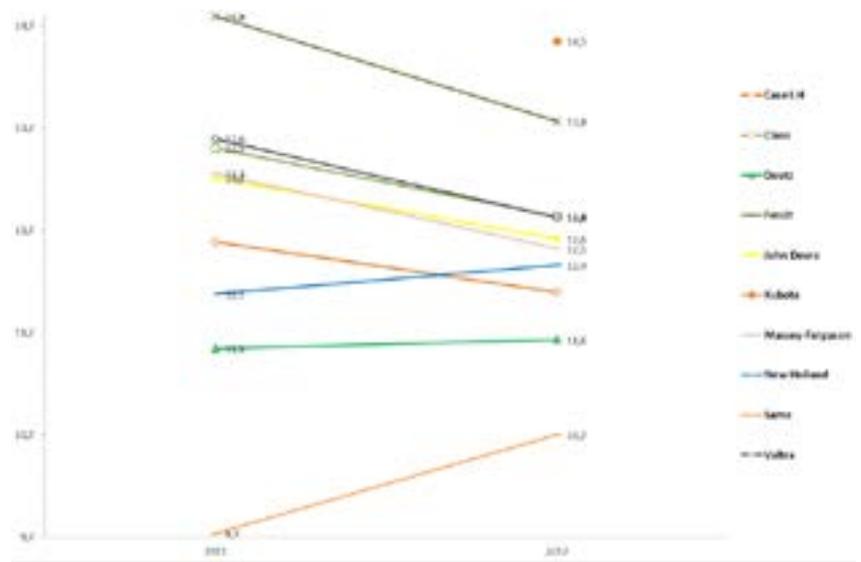




Evolution of the DSI brand average since 2011

Only Same, Deutz and New Holland have improved their grades. Fendt has lost one point since the beginning. The other brands have lost almost half point. The CLIMMAR results of the survey were sent to each tractor manufacturer present in the ranking.

During a press conference at the Agritechnica exhibition in Hanover last year, CLIMMAR President Erik Hogervorst presented the DSI survey results to members from the worldwide agricultural press.



CLIMMAR activities 2017



**CLIMMAR Spring Forum
4 & 5 April 2017, Bratislava, Slovakia**



**Working group meetings
26 & 27 June 2017, Paris, France**





**BAGMA 100 years reception
13 November 2017, Agritechnica, Hanover**

CLIMMAR President Erik Hogervorst congratulates BAGMA President Brian Sangster



**ARGE Tag der Landtechnik
23 November 2017, Wieselburg, Austria**



**LTU (Agricultural Entrepreneur Congress)
11 & 12 January 2018, Würzburg, Germany**

LandBauTechnik-Bundesverband President Ulf Kopplin (left) and CLIMMAR President Erik Hogervorst (middle)





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 about 600 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 €1.2 billion and excludes turnover with used machinery.

In Austria we sell about 4,500 to 5,500 tractors annually and 100 harvesters. We employ around 6,400 people in different functions. That means that our members have 9-12 employees on average.

NAME

ARGE Landtechnik

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KRAMP

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 animal husbandry.

The federation consists of four sub-groups, one of which is an association of those companies distributing agricultural and garden materials. The federation has 72 member dealers, representing 20% of all Belgian tractor dealers.

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. A Belgian dealer employs on average 6.5 workers (based on FTE = Full Time Equivalent). In 2016, machine sales, on the other hand, were decreasing, with sales amounting to 1,892 tractors and 59 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, machinery import, work for agricultural and/or horticultural companies, the sale of products connected with the garden industry, retail commerce or the construction of buildings and stables.

As an example of the services offered by to its members, over the last year Fedagrim organised a number of meetings with themes such as organizing a showroom, managing a shop, the latest European legislation on a Europe-wide certification process, and communicating with clients. This year, for the fourth year running, Fedagrim also conducted a satisfaction survey among Belgian tractor distributors. In 2017, the results represented the views of over a third of the market in tractor distribution.

Fedagrim has also joined forces with a public employment partner to organise a course to train those looking for a job as an agricultural mechanic. This training is partly conducted in a training centre and partly in companies and began in 2016. The second edition will take place in 2018.

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

- **Agribex**, the bi-annual international trade fair for agriculture, farming, gardens, and green spaces in Brussels. The next edition will be held in December 2019.
- **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 Fenaison**, which takes place every four years, is an open-air demonstration of haymaking materials.
- **Potato Europe**, organised every four years by the Belgian federation, is a potato trade fair including a demonstration of materials involved in potato harvesting.

NAME
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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 (Sdružení Dovozců Zemědělské Techniky) supports independent agricultural machinery dealers across the Czech Republic, providing support and services to the industry.

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

The agricultural mechanisation industry is characterised by a high degree of innovation. The mechanisation industry operates in a dynamic world: upscaling and globalising 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, and on the road. SDZT underlines the importance of testing and certification.

Mission

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 cooperates very closely with the association of manufacturers. This way, these parties can address areas of attention more efficiently. The platforms also constitute one interlocking entity in terms of agendas for strategy and lobbying.

Based upon a joint approach, SDZT wants to utilise the efficiency of the industry more effectively, as well as to promote it. To achieve these goals, SDZT cooperates with politicians, and collaborative partners. SDZT boasts specific know-how in the agricultural mechanisation industry and 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.

Exhibitions

SDZT closely collaborates with the organisers of the two most important domestic exhibitions of agricultural machinery, BVV Trade Fairs Brno and Výstaviště České Budějovice a.s. The fair that meets the strictest benchmarks is the international trade fair trio TECHAGRO / SILVA REGINA / BIOMASS in Brno. It has gained high international renown, and ranks to the most important European events. SDZT is one of the co-organisers of the fair and participates in shaping the concept of the fair and its accompanying programmes.

All decisive importers are now members of SDZT. The total amount of member companies currently is 43. The daily work is run from an administration located in Brno.

NAME

SDZT

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Tomáš Kvapil



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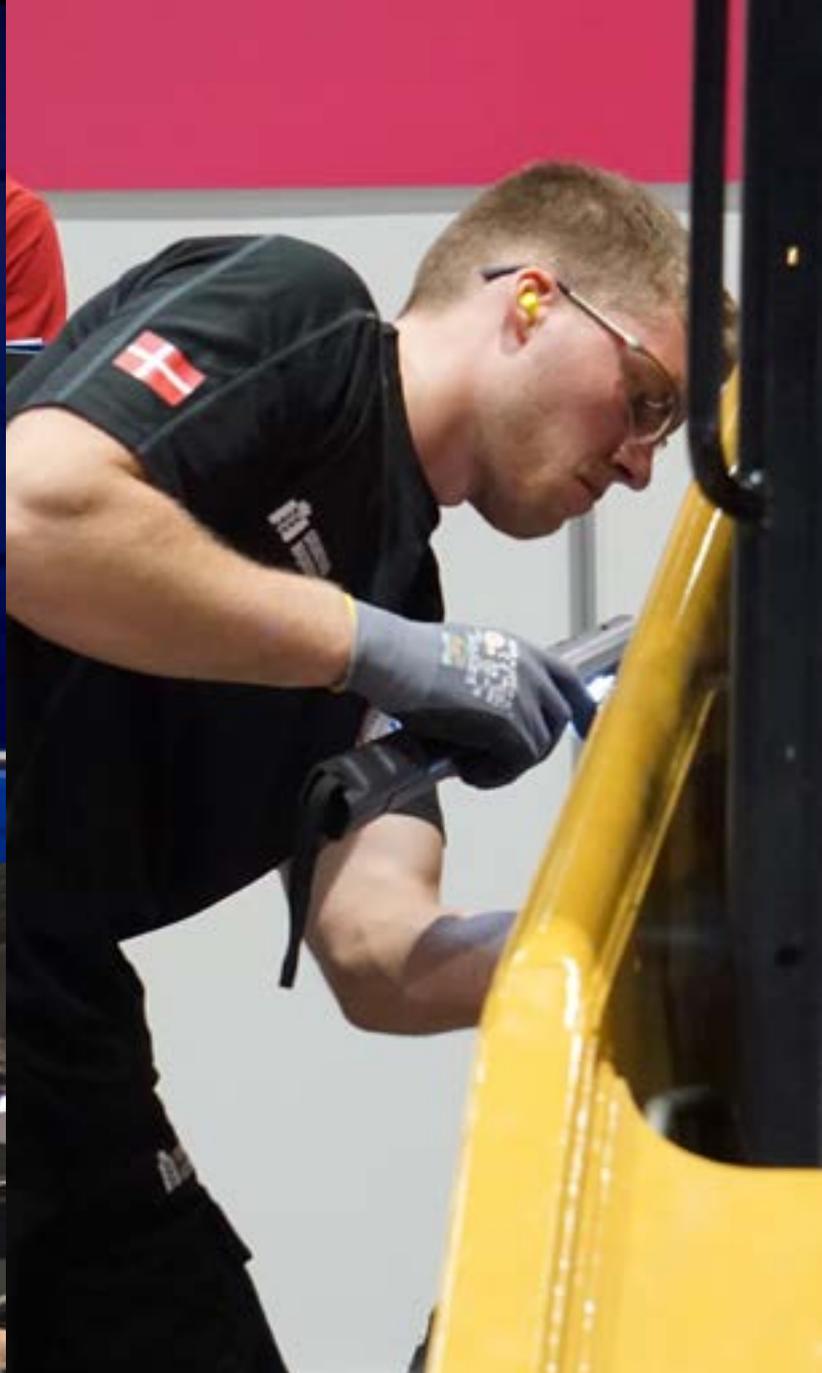
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About the Association of Danish Agricultural Machinery Dealers

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 this year.

Our organisation represents about 300 companies within agricultural machinery, contractor materials, lifting equipment and the garden & park segment. About 160 companies are also members of our employer organisation "DM-Arbejdsgiver".

Danish agricultural machinery market

In recent years, sales of new tractors have declined significantly, from 3,525 in 2007 to 1,532 in 2016. From 2015 to 2016 alone, we witnessed a decrease of approximately 13%. However, 2017 shows quite positive tendencies. The sale is up by 25% but this is partly because some dealers have decided to register stock tractors with the old EU type approval before they are sold. We estimate that the real sales are between 5 to 10% up compared to 2016. As for other agricultural machinery sales, we also saw some positive tendencies from 2015/2016 to 2016/2017, with a drop of 2% on combine harvesters, an increase of 7% on balers and an increase of 45% on foragers.

Structural development continues

The industry has been characterised in the past years by extensive and significant restructuring and new importer strategies. The structural development is currently conducted on ownership level. The fine-meshed net of businesses across Denmark remains the same and nothing indicates

future changes. As long as an agricultural concentration exists in a given area, there will also be machinery dealers. We are experiencing a reduction in main tractor dealers. However, this does not mean the end of dealers with no tractor brand, on the contrary. Instead, these dealers become sub-dealers or concentrate on other agricultural equipment.

WorldSkills in Abu Dhabi

In 2017, we proved again that Denmark has one of the worlds' best agricultural machinery mechanic educations. Søren Lykke Døssing proved it, when he won a bronze medal at WorldSkills in Abu Dhabi in October 2017. Søren competed in the category "heavy vehicle maintenance", meaning that he actually did not get to show the world his skills within his special area of expertise, agricultural machinery, since the machines used in the competition were Caterpillar exclusively.

New branch magazine

In the autumn of 2017, we took an exciting step in an otherwise digitalised world. We launched a new magazine – "Maskinhandleren" (The Machinery Dealer), which will be published four times a year. The idea of the magazine is to show our surroundings that we are a complex and exciting industry. To show that we are proud of our profession and that the industry is characterised by many interesting and inspiring people. And finally, to show that we are a booming industry, both in terms of technology and structure.

Agromek exhibition

The association is a co-organiser of Agromek, which is Northern Europe's largest agricultural fair. Agromek will be held in November 2018 in Herning, Denmark. In 2016, Agromek had 41,688 visitors in total. This year, we will participate with new initiatives.

NAME

The Association of Danish Agricultural Machinery Dealers

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**Dansk
Maskinhandlerforening**

Sikkerhed & kvalitet
siden 1918





SEDIMA is a federation of employers, the professional organisation for agricultural and garden machinery dealers. SEDIMA works for its members and also as a partner with the Ministry of Education, Ministry of Labour, and the Ministry of Internal Affairs. But also with trade unions for social laws and partners within the branch including manufacturers and farmers. The federation was founded in 1919 and will celebrate its 100th anniversary next year.

A new Board in 2017

In February 2017, the election of the new president, Pierre Prim, and a new Board for four years took place with new goals:

- Better gathering with and next to SEDIMA
- Continuation of the integration of specialized activities like irrigation, breeding, milk
- Improve the exchange of information between the national and the local
- Build a modern communication policy towards customers, manufacturers, politics
- Arouse the interest of young people for our jobs and our profession
- Adapt, create and display the services of tomorrow around the new technologies (robotic, big data, internet, 'Uberisation')
- Defend a fair sharing of added value
- Ensure the compliance of our independent status
- Enhance the supply of services of SEDIMA

The promotion events

SEDIMA is present during the big professional shows in France. Four big events took place in 2017:

- SIMA in Paris (February): with the creation of an international event, the dealer days or dealer's day-ting, offering other countries to present their actions
- SPACE in Rennes (September): the international exhibition for animal production, a dynamic expo benefitting the milk and livestock industry

- SALON VERT (September): the French professional event in green space and landscape sector
- SOMMET DE L'ELEVAGE in Clermont-Ferrand (October): Europe's no. 1 livestock show, 1,500 exhibitors and 93,000 professional visitors

Services to members

One of the missions of SEDIMA is the service to the members. Information, advice and help with all the questions, processes, problems that they can encounter in the administration and economic management of the firm. We get about 6,000 direct demands annually from our members and the use of our website is a big help to them.

Education & Training

SEDIMA is the official federation that works with the Ministry of Education and the Ministry of Labour for the evolution and the content of the qualifications and the degrees. We want to ensure the appropriateness of the needs of the dealers for the new jobs and the contents of the education and training programmes.

SEDIMA launched many actions and tools for the promotion of the jobs. It is important to attract new youngsters every year towards the profession.

One of the tools, the most mediatric for the promotion, is the involvement in the Skills organisation, at the different levels in France: regional, national, European and world competitions.

We noticed the impact of the last WorldSkills final in Abu Dhabi in October 2017, where our French champion Guillaume Leroux won a medal of excellence and a beautiful fourth place among 16 candidates from 16 countries. All the French regional champions are ambassadors for the profession and our dealers are also invited to the open-door days at the colleges and the different shows for the vocational training.

NAME

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

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Special items

Registration of tractors: SEDIMA has signed a convention with the Ministry of Internal Affairs that allows the members of SEDIMA to register the vehicles and machines via a process which is developed together with the Ministry.

Simo-net: Our website www.simo-net.fr for the evaluation of a second-hand machines has been renewed and the users can now define more criteria for a precise quotation.





Association's structure

The structure of firms and their association in Germany differs a lot from other 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". These Innungs aggregate in a supra-regional organisation called "Landesinnungsverband" and all of them form the national relevant association "LandBauTechnik-Bundesverband" (LBT). This means that the German LBT formally has 10 members, but is representing about 4.300 companies, dealing with agricultural equipment as well as garden, construction and cleaning machinery and, most important, they service all this machinery. Industrial-firms, manufacturers and even contractors are not LBT-members. All in all, LBT covers about 60% of the relevant companies and more than 90% of the national market.

About 550 of the dealers have exclusive contracts with most important tractor brands, so-called A-dealers. They normally are fairly large and create 80% of the national machinery turnover. In most cases they have multiple own satellite companies in the countryside. Especially for them, LBT founded so called "Brand-Associations", professionally managed groups of dealers for just one (tractor) brand, settled directly on the national top level. On the other hand, there is a special daughter association for dealers that concentrate on garden and municipal machinery market: "Bundes-Fachgruppe Motorgeräte", BuFa-MOT.

Key figures

In Germany we count 4,327 active companies with 43,900 employees creating €8.8 billion turnover annually (2017). 3,600 of the companies are educating young people for their staff, all together 7,700. Just 1% of all apprentices are females.

Market and Branch

275,000 German farmers cultivate 16,425,000 ha, on average 60 ha per farm. Eastern German farmers farm on average

232 ha, in the South this is 37 ha/farm and in the North about 100 ha/farm. This means that the concentration of farmers (our customers) varies enormously, as well as their activities. On average, farmers invest €73 €/ha for spare parts. In Eastern Germany this is €38, in the South €100 and in the North €86.

Farmers	275,400
Farmland (ha)	16,425,000
Contractors	3,300
Tractor registrations (new)	37,722
Second hand tractor sales	79,500
Tractors in customers' stock	1,420,000
Employees per company	10.2
Turnover per company (€)	2,010,000

Statistics based on 2016:

Qualification

One of the most important aspects is qualification of the whole staff in the dealerships, from the start through the whole career. LBT is continuously developing the basic qualification for apprentices, even creating new steps on the career ladder. LBT is looking for partnerships with High schools and Universities. Even for all the other experts in a current dealership, sales, spare parts, exports, second hand equipment, financial items and a lot more, we founded an own LBT-Academy, together with our official magazine AGRARTECHNIK.

Promotion of branch and profession

For the promotion of the branch and the professions, LBT developed the campaign "starke Typen", which translates to "technics for solid youngsters". The campaign is supported by nearly all manufacturers! LBT developed a lot of materials for companies to help them convince interested people that agriculture is "the best branch of the world".

NAME

LandBauTechnik-Bundesverband e.V.

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Ulf Kopplin



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Exhibitions

LBT is partner of the Agritechnica, the "world's no. 1" in the branch-exhibitions. Every two years LBT is responsible for the International Dealers' Centre in hall 2: a lounge where colleagues from all over the world are invited to feel host for their customers, partners and employees. It is our all "home on the fair". Quite close LBT organises the "workshop live", a show for promotion our branch and profession especially for schools from all over Germany. LBT is also a partner of some other exhibitions of national importance like DemoPark (garden- and municipal-equipment), EuroTier (indoor-farming equipment) and others.



MEGFOSZ (National association of Agricultural Tool and Machinery Distributors)

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

An important task of the association is to determine the basic norms of the members operation, making known the provision of law and participation in the preparation of changing laws. The association expresses the opinion of member companies in the permission and control issues of agricultural tool and machinery distribution to increase the efficiency. Another important issue is the evaluation of domestic and international markets and the submission of its analysis to the members during professional forums or any other ways.

MEGFOSZ management was renewed in 2012. The new management has very actively organised the association operation which brought results. At the general meeting in 2017 of April almost the same persons were re-elected, so the renewed presidency continues the work started before. The number of association's member companies was 60 in 2012 and grew to 101 in 2017.

Annual turnover of MEGFOSZ members from the distribution of agricultural tools and machinery was approximately €717 million in 2016. For 2017 we expect increasing numbers. More than 3,100 employees worked at 255 companies of the sector in 2017 and there were about 448 trainees in the sector.

MEGFOSZ started a campaign in 2014 called „Become Agricultural Mechanic too!” The main goal of this program that is also continued in 2018, is to promote our sector with a cooperation of over 100 partners, such as Ministry of Agriculture, The Hungarian Chamber of Agriculture, MKB Bank Zrt., Hungarian association of Agricultural Machinery Manufacturers, and almost all of the agricultural secondary

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

Goals of the campaign are:

- MEGFOSZ would like to assure the agricultural replenishment of mechanics, mechanical engineers, machine operators, etc.
- Increase the image of the agricultural career
- Improve the employment rate of the agricultural sector outside the capital Budapest
- Increase the competitiveness of the Hungarian agricultural output through assuring the appropriate experts in long term

Exhibitions

There are a lot of regional agricultural exhibitions in Hungary and therefore, so our Marketing Committee has decided to focus only on the three biggest events in order to help the members optimise their presence and budget. The selected exhibitions are:

- **Agricultural Machine Show** (AgrárgépShow), Budapest
- **Animal Husbandry Days** (Alföldi Állattenyésztési Napok), Hódmezővásárhely
- **II. NAK Field Days and Agricultural Machine Show**, Mezőhegyes

Thematic committees

MEGFOSZ has several thematic committees including:

Statistics – The team is supposed to control the compliance with regulations of the data collection and data management in the country, and give Climmar data

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service too. This year we started to work on an inner statistics system in accordance with the competition law.

Exhibitions – For every Hungarian agricultural exhibition, we have a special committee. Their main task is to get good conditions at the fairs.

Approved Machine Dealers Program – At the end of 2015, the members decided to make the market more transparent by working on a new system that classifies the market participants based on criteria. The aim of the committee is to work this system out.





UNACMA is the National Association of dealers, repairers of agricultural and garden machines. It is also the representative of merchants, workshops and spare parts' dealers for the agricultural, gardening, forestry, irrigation and zootechnic machineries' fields. It is uniformly present throughout the national territory and it gathers together both the locals ACMA (Agricultural Machineries' Merchants' Associations) and the individual companies.

In 2017 the Association mostly focusses its activity on:

- To solicit agricultural machineries' inspection
- Lobbying activities to the Italian Parliament, Ministers, Regions, Institutions
- Unacma Roc: a certificated network of workshops
- Mech@grijOBS: through the most important national fairs Unacma promotes youth education in mechanics, agriculture and mechatronics
- Unacma for life: Unacma is promoting the realisation of two workshops in Africa
- Unacma takes part in the biggest national and international fair and occasionally also organizes events
- Unacma has supported survey activities made by Climmar
- Application of Mother Regulation
- Digital agriculture
- Management of problems related to sale of used and theft in the industry
- PSR (Rural Development Programme)
- Quarterly magazine called Unacma life
- Guarantee for second hand machinery (Sicura!).

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 agricultural machinery dealers handling tractors, and combine harvesters**. Unacma has about 200 members with an aggregate turnover of 80% of the total. The total number of dealers' employees is about 8,300.

The market trend reveals that in the past 15 years, there has been a decrease of 50% in tractors sales even if no change in the number of dealers has occurred. This proves the ability of the dealers to meet the need of the marketplace.

According to data collected by FederUnacoma, **the number of new tractor sales in 2017 will be about 18,500**.

Activities of the national representative organization

With respect to its educational activities, the most important and successful project is the **Mech@grijOBS**.

The aim of the project is to inform students of Italian technical institutes about the skills they need to have in order to become professionals in the sector. By participating to the project, the students have the chance to do an internship at an Italian dealer. This year, Unacma met more than 1,000 students from several Italian secondary schools who participated to our workshops.

In partnership with INAIL (National Institution for Insurance of the workers), Unacma deals with professional updating

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courses regarding the compliance with the latest Italian codes. The aim of the program is to train dealers and workshop employees about Italian law on the agricultural machineries' inspection and get them into the our Unacma Roc network: the "certificated network of workshops".

Unacma is partner of Enama (National Authority for the agricultural mechanization) and Confcommercio (General confederation of trade company).





LTRTA is a voluntary non-governmental organisation, founded in 1999 by 6 members as the industry's business representative. It combines agricultural equipment manufactures, trades 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.

LTRTA goals:

- Protect the interests of agricultural machinery manufactures and dealers – to arrange 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 member's interests at national and local level – Ministry of Agriculture, Farmers Parliament, CLIMMAR and farmers NGO Advisory Council.
- Education & Training – young professional's mastery competition.
- Improvement of agricultural education system in Latvia and cooperation with professional education institutions, helping to increase the prestige of professional education.

Our members and the market

- Work in different regions of Latvia, with a wide range of sectors: crops, milk equipment, breeding, forestry, market gardening, landscape maintenance, road construction.
- 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.
- The customers: farmers, local authorities, contractors, construction enterprises, infrastructures, owners of forest, horticulture and landscaping companies.
- 58,496 farmers cultivate 1,711,481 ha agriculture land, average farm size 29.26 ha including small farms. The market is divided in four regions.
- Market activity is highly dependent on announced project applications for EU Structural Funds under the Rural Development Plan 2014-2020.

• Sales volumes for 2017:

Tractors	796
Combine harvesters	144
Telehandlers	135
Foragers	4

	Latvia	LTRTA members
Registered in Register of Enterprises of Latvia	258	29
Turnover	€ 528.8 million	€ 329.4 million
Number of employees	1,945	738

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Key figures and contractor profiles

Fédération des Entreprises du Machinisme Agricole et Industriel du Grand-Duché de Luxembourg (FEMAL) consists of 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 agriculture, viticulture, forestry, horticulture, 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 three years of professional training (company/school) in an apprenticeship contract in an established company.

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

The turnover of the whole sector was around €180 million 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 agricultural enterprises decreases annually (with 15-20 firms/year), which naturally has a negative effect on the sales 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 amount to €20,000.

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

	2017 (1st half)	2016	2015	2014	2013
Tractors	128	160	168	183	229
Combine harvesters	5	4	5	17	12
Telescope loader	59	69	65	126	170
Forage harvesters	5	7	4	2	12

Activities of the national representative organisation

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 the 64th CLIMMAR Congress in October.

Projects for 2018: organisation of a "Market for second-hand agricultural machines", reorganisation of the vocational training, presence at National Agricultural Exhibition of Ettelbruck in June, participation at CLIMMAR Congress in October in Prague, organisation of a "Week of Agricultural Machines" in all enterprises of the federation 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 930 members, of which about 700 are dealers, 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 62,000 in 2017 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 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). Main goals of Fedecom 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 Business School, we train new students and experienced workers. An essential part of the Fedecom Business School is the "lifelong support" by our MentorPlus consultants. They visit over 400 students and their employers six times a year in order to optimise the effect of the training.

A-Keur is our own dedicated certification tool. Even though annual testing is not mandatory in the Netherlands, about 30% of our members are VA-Keur certified and execute over 150,000 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
- **GroenTechniek Holland** for turf-care 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 LTO (farmers) and Cumela (contractors). 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 are then updated with a lot of valuable information.

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

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Fedecom

PRESIDENT

Erwin Ros



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Main activities 2017:

- Lobby EU regulation machinery and road traffic registration
- Restructuring the collaboration model with education centres and start up own education tools
- Indoor Agricultural trade fair in Assen
- Several theme information sessions for members
- Smart Green Business event and start-up of a new network group on this issue
- M.O.V.E., 'Mechanization Development Women Event' on interactive competence development
- Start-up the project of durable availability of staff



Big size gives power

This motto promotes the firms which decided to establish the Polish Chamber of Commerce of Agricultural Machines and Facilities (PIGMiUR) in 1998. The motto is still valid. Nowadays, the Chamber has a significant voice in the industry, that takes care about its interests. PIGMiUR is an independent organisation currently bringing together 93 companies from the sector of agricultural machinery and equipment. It includes all the major domestic manufacturers and distributors of machinery and representatives of international brands of agricultural machinery and equipment.

Industry facts 2017

- In 2017, 10,850 new agricultural tractors were registered. 1,898 more than in 2016 (+21.2%)
- The sales volume of used tractors increased to 16,292 units versus 15,302 units in 2016 (+6.4%)
- The number of registered agricultural trailers increased to 4,703 units from 2,994 units in 2016 (+57%)



No. of registered of new tractors in Poland

Exhibitions

Mazurskie AGRO SHOW (Mazurian AGRO SHOW)

An indoor exhibition of agricultural machines, that 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 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 and it has been organised since 1999 with over 900 exhibitors (100 from abroad), 150,000 visitors and 150,000 m2 of exhibition area.

In 2018, the 20th edition of the exhibition will be held.

Education and training

- MECHANIK NA MEDAL (PERFECT MECHANIC): contest intended for employees of the services of agricultural machines and facilities.
- MŁODY MECHANIK NA MEDAL (PERFECT YOUNG MECHANIC): contest intended for students of agricultural schools who plan their future with a profession of a mechanic for agricultural machines.
- SERWIS NA MEDAL (PERFECT SERVICE): contest that 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: training project intended for 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.

PIGMiUR analyses and studies

PIGMiUR regularly monitors the market of tractors and trailers. Reports based on

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Polish Chamber of Commerce of Agricultural Machines and Facilities

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data from Central registration of vehicles and drivers are sent to the members of our Chamber every month. Every six months, we conduct a survey of sentiments in the sector. Its results are used to calculate an indicator of the sentiments in the sector of agricultural machines and facilities.

PIGMiUR Bulletin is published every quarter and contains the most important information about our activities and news from companies belonging to our Chamber.



AGRION – the Slovak Association of Agricultural Technology Suppliers

AGRION – the Slovak Association of Agricultural Technology Suppliers – was established in 1994. It currently connects 54 of the biggest and most important importers, sellers and manufacturers of agricultural machinery.

2017 was a significant but also a difficult year for AGRION. In addition to its traditional events, the association also focussed on new activities and goals. After 23 years, AGRION appointed a new president. The association became the guarantor of a new secondary school study programme called Agromechatronics. Finally, due to unfair pricing conditions, AGRION members refused to attend an exhibition whose establishment they initiated ten years ago.

New President

Ján Jech, who had served as the association's president for 23 years, has been succeeded by Peter Matejovič. The new president of AGRION has been active in the area of agricultural machinery maintenance and sale since 1992. He is one of the founding members of AGRION and before being appointed president he had served as vice-president for years. One of his main achievements as vice-president was helping AGRION join CLIMMAR. For the future, AGRION is considering focussing on other business activities that could have a positive impact on the association's financial situation and could reduce its members' business costs.

Agromechatronics study program

There is an increasing need for experts in the area of agricultural machinery maintenance. In cooperation with the Ministry of Education, AGRION has prepared a study programme called Agromechatronics that addresses this need. The association has joined forces with three secondary profes-

sional schools and as many as 30 students enrolled in the new study programme in September 2017. Our goal is to increase the number of students enrolled in the first grade to more than 40.

AGROSALÓN

AGROSALÓN, the specialised exhibition for agricultural machinery, was established in 2006 as an initiative of the AGRION association. In 2016, unfortunately, the organiser of the fair - the state-owned exhibition centre Agrokomplex - failed to reach an agreement with AGRION about attendance conditions at AGROSALÓN 2017 for its members. As a result, nearly all members of the association refused to attend the event. The management of AGRION is convinced that it will be important to strengthen the association's position in the fair's organization process in the future.

Field Days

The Fodder Plant Field Day traditionally is organised by AGRION in May 2017 marked its 23rd edition. Our member companies were very satisfied with the event, which had a high attendance and maintained an excellent standard from a professional perspective. Sadly enough, the Autumn Agriculture and Maize Field Day, which took place in September 2017 in Eastern Slovakia and is co-organised by AGRION, was adversely affected by unfavourable weather. For this year, AGRION plans to increase the number of field days where it acts as the main organiser from two to three and it also plans to continue co-organizing the nationwide event.

CLIMMAR Spring Meeting

The main task of organising the CLIMMAR Spring Meeting in April 2017 in Bratislava consisted of arranging a venue and a programme for the delegates. In the future, AGRION will also express interest in organising a CLIMMAR Congress.

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Information sheets

AGRION members are continuously informed about matters such as new legislation, market development and the organisation's activities. This is achieved by means of information sheets, of which AGRION published 42 in 2017.





About MaskinLeverantörerna (ML)

ML, established in 1948, 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 agricultural machinery sector in ML has 70 dealer companies and 47 importers and manufacturers. ML members have approximately 90% representation in the total agricultural sector in Sweden.

Together with LRF – the Federation of Swedish Farmers – ML has formed a council, to which the members can turn to resolve disputes between seller and buyer. This is an alternative to resolving the dispute in public court. This council deals with about 5-10 disputes annually. ML also offers members a unique insurance for compensation for indirect losses. If the farmer has a loss of production caused by the goods purchased from a member in ML within the first 18 months from delivery, this insurance can compensate these kinds of losses.

Activities in 2017

Education

ML is focusing on finding new mechanics. The member companies need to recruit over 200 mechanics per year over the next five years. Only 60 new mechanics are finishing high school every year. Many schools are closing their mechanic programmes due to high costs. In order to stop this downward spiral, ML will choose ten schools throughout Sweden to cooperate with and provide them free of charge with machines, technical service information and supplementary training for the teachers. The students in the chosen schools are invited every year to the Volvo Visitor Centre, which is much appreciated by the students! Every year ML also arranges a trip for the graduating students to a manufacturer in Europe. In May 2017 we visited JCB in Rochester, England with 45 students.

Exhibitions

ML is increasingly getting involved in trade fairs in Sweden. The members were of the opinion that the existing fairs had lost focus on the core products, that visitors did not have enough time to see the actual machines with all the novelties and nick-nacks being sold at the fairs. In 2016 we organised our first own fair, Svenska Maskinmässan, where only members were allowed to exhibit. This resulted in 46 new member applications (of which 38 were approved). This first fair in 2016 was a big success and got very good reviews from both visitors and exhibitors. The fair will return in 2018 (31 May to 2 June) and is already sold out in terms of exhibitors.

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Key sales figures in Sweden

	2015	2016	Change	Jan-Aug 2016	Jan-Aug 2017	Change
Tractors	2,681	2,965	11%	1,863	1,668	-10%
Combine harvesters	195	216	11%	156	147	-6%
Seeding machines	423	468	11%	341	353	4%
Round balers	275	294	7%	220	222	1%
Ploughs	462	413	-11%	253	381	51%
Turnover for the member companies (dealers):	9,487,400,000 SEK = €976,477,000					





Gold for Switzerland

Swiss agricultural engineer Adrian Krähenbühl shot to first place at the WorldSkills competition in Abu Dhabi, earning the title of world champion. His achievement is the perfect testament to the outstanding quality of vocational training in Switzerland. Months of intensive preparation in partnership with the professional association Agrotec Suisse really paid off. The competition programme in Abu Dhabi was tough. Over four days, participants completed seven practical tasks which involved identifying and performing diagnostic, adjustment and repair work. Tackling these challenges with the utmost concentration, precision and a remarkable level of calm, Adrian came out on top.

Congratulations Adrian, we're proud of you!

New advanced training course in diagnostics engineering for agricultural machinery

Until now, Swiss agricultural engineers have completed further training by taking a professional examination to become a workshop manager for agricultural machinery and then an Advanced Federal Diploma of Higher Education to become a mechanical engineer specialising in agricultural machinery. Nowadays, workshop managers at agricultural machinery businesses in Switzerland often have the latter qualification, which is why the former has been developed further and given a new practice-oriented title.

It is not just the title of the new training course in diagnostics engineering for agricultural machinery that has changed. The course places a greater focus on specialist basic principles and complex technical work, while staff and workshop management are addressed primarily in the Advanced Federal Diploma.

Diagnostics engineering for agricultural machinery covers complex diagnostics, repair and modification work on agricultural, farming, municipal and forestry machinery. It analyses intricate problems systematically and comprehensively, developing and applying needs- and customer-oriented solutions. This new advanced training course aims to make diagnostic engineers working with agricultural machinery the best qualified members of staff in their companies. It provides training on how to communicate appropriately with workshop staff, customers and suppliers. The course is due to start in spring 2018.

About Agrotec Suisse

With some 630 members, Agrotec Suisse is the Swiss professional association of agricultural engineering companies and is part of the umbrella organisation AM Suisse. The Agrotec Suisse association is firmly established in the local regions and is committed to the entrepreneurial success of its members, cultivating a broad network of experienced companies and specialists. It offers a range of training and advanced training courses to share tomorrow's knowledge today. The association is responsible for providing technical training in agricultural, construction and power tool engineering as well as basic and advanced blacksmith training. Agrotec Suisse also offers a wide range of services relating to occupational safety, technical support, surveys, corporate management and legal consulting. Compared to many European countries, the Swiss agricultural engineering sector is fairly small-scale. Only 15 per cent of Agrotec Suisse's member companies employ more than ten members of staff. In 2016, the 630 members had around 4,700 staff and some 1,300 apprentices. The members include agricultural engineering companies, dealers of agricultural equipment and importers with their own distribution centres for agricultural and municipal equipment as well as power tools. Many companies perform additional activities in other related fields.

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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 of the 64th CLIMMAR Congress 5-7 October 2017

At the 64th annual CLIMMAR congress held in Luxembourg city from 5 to 7 October, 16 national dealer associations discussed about the future of agricultural and garden machinery dealer organisations. The congress, visited by delegates from dealers from all over Europe, was organised by Luxembourg' member association, FEMAL and opened by **Michel Reckinger**, President of the Luxembourgish Federation of Crafts and **Romain Siebenaller**, President of FEMAL.

In his opening speech, President **Erik Hogervorst**, addressed the large focus dealers tend to have on the represented brand(s) instead of focusing on the customer and his needs. He also emphasized that dealers play a big or maybe even the biggest role in the brand awareness of customers. With (full line) manufacturers struggling to keep their shareholders satisfied and their market shares rising, it's important for dealers to make a difference with entrepreneurship.

Election of the Presidency

Erik Hogervorst was re-elected as President for a second three years term. Vice President Joost Merckx was re-elected for another three years term as well and served six years so far. Vice President Ulf Kopplin served for nine years and was not re-electable. Ludger Gude was therefore elected as the new Vice President.

Erick Thürmer, CEO and owner of Danish thread cutting tool manufacturer Thürmer Tools first wowed the audience with his presentation about 3D and 4D

printing and virtual reality and how it will change the agricultural machinery industry. After that, four groups discussed on the congress theme "Dealer 2030" that will result in the future agenda of CLIMMAR and a position paper.

Dieter Dänzer, Editor in Chief of German magazine AgrarTechnik, moderated the plenary discussion afterwards that resulted in the following themes that will be part of the CLIMMAR future agenda and position papers.

Partners COPA/COGENA and CEETTAR

The second day of the congress was opened by the Luxembourg Minister of Agriculture **Fernand Etgen**. After that, **Max Schulman**, Finnish farmer and Chairman of a working group within farmers association COPA/COGENA, explained that farming is an old profession but far from old-fashioned. He says the industry is in a rapid change from simple machines to intelligent and connected machines. Dealers face the challenge of selling these connected solutions in understandable language, making sure old and new machines work together and delivering knowledgeable service 24/7 and 365 days per year.

Klaus Pentzlin, German contractor and President of the European Contractors Association CEETTAR and of the German Association of Contractors BLU, urged manufacturers and dealers to come up with a uniform data communication

standard and platform to ensure any tractor can communicate with any implement. According to him, smart farming solutions require a customer – dealer partnership and loyalty built on confidence and personal service by specialists.

Mr. Pentzlin described this service as a primary ("kaufentscheidende") purchasing decision and he stressed that only dealers in close proximity can provide this year-round. Last but not least, he mentioned that the drive of many manufacturers to become full liners, is not a good development for farmers, contractors nor dealers.

Dealer remain to be key success factor

Jürgen Linder, Vice-President Distribution Management of AGCO, explained how AGCO expects that on tractors, machines and implements, electronics will account for 60% of the machine related services in the year 2030 and hardware like steel and hydraulics only for 40%. Currently it is the other way around. Mr. Linder also explained that AGCO expects software and consultancy, or rather non-machine related services, will play a decisive role in 2030. He stressed out as well that a successful dealer network will remain to be a key success factor in distribution for full line manufacturers. The future role of dealers however depends on the (added) value they provide in the distribution chain. Added value on multiple aspects and certainly on customer knowledge and trust, after sales service, smart farming and agronomic understanding.





**CLIMMAR Congress
5-7 October 2017, Luxembourg City,
Luxembourg**





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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 5 to 7 October 2017 in Luxembourg city, Luxembourg. The 65th edition is scheduled for 4 to 6 October 2018 in Prague, Czech Republic. The national branch organisation SDZT is responsible for the organisation of the 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 congresses.

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 – **Neudsiedl/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)
2017 – **Luxembourg City** (Luxembourg)



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