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Dear dealers,

This year marks 30 years of AGRITECHNICA, the world’s largest agricultural machinery and equipment show, which has been taking place every two years since 1985. And this year we are once again expecting around 2,800 exhibitors from more than 50 countries. This world-leading event will be home to the very latest solutions for the future of crop production. There will be an exciting array of agricultural innovations to explore across 24 halls – making this an unparalleled forum for networking, gaining inspiration and fact-finding.

AGRITECHNICA is becoming ever more popular year on year. Not just among farmers but also among contractors, machinery rings – and, of course, among you, the dealers, as a key link between manufacturer and end customer. So this year Hall 2 will be dedicated entirely to the trade and services industry. Our new International Dealer and Service Centre will be open for you to use throughout the entire event. Here you’ll find professional solutions to any issue that may arise from your business activity – from a market place for new and mature spare parts to advice on financing and haulage. This is the go-to place for meeting national and international farm machinery dealers. So please do come along and visit us in Hall 2. You’ll find a very warm welcome there.

Right next door will be the Information Centre for the Used Machinery Trade, where more than 50 companies will be selling used machinery and allied services. To complement the comprehensive offering in Hall 2, this year sees the return of our unique Workshop LIVE stand, where we give visitors a taste of day-to-day life in a workshop and demonstrate just how multi-faceted and attractive a career as an agricultural and construction machinery mechanic can be. As a potential employer, you can use this unique platform to talk to and recruit the next generation of professionals in this field. Read more on this on pages 10–11.

This year there is a new feature to bear in mind when planning your visit: the VIP Card has been replaced with a voucher system. So before you come, don’t forget to trade in your day pass voucher for an admission ticket by going to our website. You’ll find more information on this on page 23.

Plenty of old favourites, but lots of new, exciting and dynamic features as well – that’s what you’ll find at this year’s AGRITECHNICA. We’re a trade fair at which agricultural machinery dealers are playing an ever more important role, and we’re home to every aspect of the business and its national and international associations.

I hope you enjoy reading this brochure and that it will give you an exciting taste of the world’s biggest agricultural machinery and equipment event here in Hanover in November. We look forward to welcoming you to AGRITECHNICA 2015!

F. v. Czettritz

Project Manager
Dear colleagues,

Within Climmar we work on better conditions for the dealers, more unified regulations in Europe and the European promotion of our profession. This year’s edition of AGRITECHNICA will have a maximum contribution on this work as there will be a large area (“Werkstatt live” in Hall 2) to promote our jobs and a meeting point where you are all invited to hear the last positions of our work and help us with your ideas: the International Dealers’ and Service Center, also in Hall 2. In this way Climmar is able to support your national branch organization’s items in the best way.

The presentation of the European results of the dealer satisfaction index will be a central item to improve the relationship between you as a dealer and the manufacturer. Over the last years we have really seen a big improvement with the manufacturers that are positive against this survey and a decrease in satisfaction with some manufacturers that ignore the needs of their dealers. In fact this result is not only in satisfaction but also in market share. These results encourage us to continue our work on the DSI and ask all European dealers to fill in the national questionnaires. Please ask for the results and your possibility to participate at the Climmar counter in Hall 2.

We find ourselves in challenging time where EU regulations have a huge impact on our business. One of these items is the new regulation on Repair and Maintenance Information (in force from 2018). This will probably change the way we work in the chain dramatically. Within Climmar we are working hard to be ready for these changes so all European dealers are able to continue their service for the customers without being forced into investments that will make it hard to survive.

We are all working in a beautiful branch where we contribute to the most basic needs of the world’s population – this with the challenge to increase production with respect for the environment. Together we can contribute to keep these goals as clear as possible with respect for all people that are working in it.

As more than 30,000 dealers from all over the world will visit AGRITECHNICA it is fair to say that the importance of this exhibition for the agricultural world is above all doubts. In the present time the actual sales on an exhibition are mostly less than we would want, but perhaps the importance of an exhibition is more to create an overview for the customers of what the industry is capable of. With this we make our customers (young or old) proud to be a farmer and inspire them to improve their production with new techniques. The result of the exhibition is in this case shown over the year after the show. AGRITECHNICA as a meeting point of all stakeholders in agriculture is in this case your biggest profit.

See you soon in Hall 2!
Mr Kopplin, the Federal Agricultural Machinery Association and CLIMMAR are operating the new Dealer and Service Centre at this year’s AGRITECHNICA. What is that, and what new features does it offer?

Kopplin: Dealers and craftsmen play different roles at AGRITECHNICA. First off, they are visitors to the trade fair. Besides that, act as consultants to customers on their manufacturers’ stands and last they work hard to get as many of their own customers as possible to come along to the event. That’s as true for German dealers as it is for their international counterparts. But in the past all these dedicated people did not have a natural home at the trade fair. This is set to change now with the Dealer and Service Centre, which we are calling ‘my home at the fair’. It has been this way since 2003, so this year we’ve added something new.

Our association and DLG have created the new Dealer and Service Centre in Hall 2 specifically for businesses that would not normally have their own stand at AGRITECHNICA, either because they are too small or would not seem attractive enough or because they would not be found, except perhaps by the wrong people. So the Dealer and Service Centre is a place where these smaller exhibitors can find exactly the right target group for their specialist services.

So is it aimed exclusively at dealers?

Kopplin: In visitor terms, yes – both German and international dealers, regardless of what association they belong to. Naturally, this also includes their staff, partners and core customers. After all, it’s ‘their stand’. We want to give dealers and service organizations a home base on the stand. In addition, there will also be lots of additional offerings at the Dealer and Service Centre to make sure there is something for everyone.

What kinds of offerings?

Kopplin: I have already mentioned the special service providers. They will have information desks around the outside of the centre. All the exhibitors will have AV technology available for one-off presentations – we have yet to work out the timings for these. And people holding small impromptu meetings, for example with fellow manufacturers or guild members, will also be able to use the equipment for short, ad-hoc presentations. National and international advisers from our various branches will also be on hand to give members advice on different subjects. So it will be our Centre of Excellence for all aspects of running a business in the sector.

What kinds of service providers are we likely to see at the centre?

Kopplin: It could be any that see us specialists as customers, such as used machinery valuers, logistics companies, customs clearance companies, dealership and network developers, insurance companies, niche banks, conditioners, tool suppliers, online marketplaces, personnel development companies, buying cooperatives, trade schools, and any other businesses that cooperate with the associations. We will see how this develops. Not everyone will be there the first time around; this new concept needs time to bed down and develop.

Where will the centre be?

Kopplin: We will be in Hall 2. And not without good reason. This way we are near all the usually smaller stands of dealers, dealer groups and exchanges within the Information Centre for the Used Machinery Trade. Right next door, Workshop LIVE will be running an activity every hour. We developed these two formats jointly with DLG over many years and which are our joint babies. So Hall 2 will be a true melting pot for dealers and craftsmen from Germany and abroad. It’s something no dealer should miss out on.
**Interview with Project Manager Freya von Czettritz**

Freya von Czettritz has been Project Manager of AGRITECHNICA since 2010. We spoke to her about changes and new features at AGRITECHNICA 2015.

**What are the main changes in this year’s key area floor plan?**

Freya von Czettritz: The fairgrounds are fully booked again this year. All the exhibitors have once again been sited according to their product or key area. The key areas are designed to enable visitors to find their way easily around the fairgrounds. Tractors and combine harvesters, which act as a magnet for visitors, will be located in the north, east, south and west of the grounds. The Tillage and Crop Management area will be in Halls 8, 9, 11 and 12 for the first time. The rapidly developing area of Agricultural Electronics and Software can be found in the southern part of Hall 15. Organic Fertilization will be in Halls 21, 22 and 23 this year, right next door to the Bioenergy zone in Halls 18 and 23. Another innovation this year: the open-air demonstrations of forestry equipment will be under the large wooden roof to the south of Hall 26. Also featuring many DLG highlights, this AGRITECHNICA Plaza area will be very popular with visitors. The new Campus & Career area with its focus on training, careers and science will also be located there. The future is something that concerns us all, so there will also be some exciting features and highlights for the younger generation, alumni, young professionals, and engineers and developers.

Where can agricultural machinery traders find relevant offerings, and what is on offer for them?

Freya von Czettritz: Everything to do with agricultural machinery trade can be found in Hall 2, from workshop equipment to wholesalers to the new Dealer and Service Centre. All aspects expected of the trade these days, such as servicing, delivery times, financing and much more besides, will be covered here. To complete the offering, there will also be a series of interesting seminars at the Dealer and Service Centre. Right next door, Land-BauTechnik, the German Agricultural and Construction Machinery Association, and other representatives of the agricultural machinery industry will be demonstrating the work of the agricultural and construction machinery mechanic. As in previous years, we hope this successful concept will once again inspire lots of young people to join the fascinating world of agricultural machinery and show them what a diverse and exciting career this can be.

**What will AT 2015 have on offer for the next generation in our industry, and where will they find that?**

Freya von Czettritz: At Campus & Career – Training. Job. Science. For the first time this year, DLG is running a dedicated career area at AGRITECHNICA called Campus & Career. This will be an excellent starting point for jobseekers and young entrants to the profession looking for more information on careers in agricultural machinery and the agricultural sector in general. Campus & Career will bring together everything to do with jobs, further training and careers as well as research and science. In addition to personnel recruitment stands there will be established features such as Young Farmers Day, Campus and DLG Career and Job Advice. And for the techies amongst us, Workshop LIVE in Hall 2 will once again offer a behind-the-scenes look at the work of an agricultural and construction machinery mechanic. Young trainees and their companies will talk about their jobs, what training is needed and what kind of work is involved.
Mr Thiesgen, what is Workshop LIVE and what do you hope to achieve with it?

Thiesgen: Workshop LIVE is an exhibition of trades and crafts in Hall 2 on the AGRITECHNICA fair ground. After all, AGRITECHNICA is the world’s leading trade fair for agricultural machinery and equipment held every two years in Hanover during seven days and attracting over 450,000 visitors. It is the second largest trade fair anywhere in the world, far bigger than CeBit, Autosalon, the Frankfurt Motor Show (IAA) or the Hannover Messe. And yet many people still know very little about our industry. We hope to change this with Workshop LIVE – at exactly this ‘World’s No. 1’ show. As the association of agricultural and construction machinery dealers and manufacturers we want to fly the flag for our industry with our Workshop LIVE team: Our industry is so sexy, future-proof, innovative, trendsetting, challenging and offering a wealth of opportunities all over the world for those who finish a training in it. Pupils in years 8 to 10 will be able to set their hands on the machinery, discuss it with their peers, find out what apprenticeships are available or try a practical taster.

Who makes up the Workshop LIVE team?

Thiesgen: Workshop LIVE shows what happens in an ordinary workshop on a day-to-day basis. But instead of using actors, we use young people from our companies. So it’s ‘real people’ straight from the shop floor that make up our Workshop LIVE team. The team consists of 15 apprentices, journeymen (who have completed their apprenticeships), service technicians and master craftsmen – drawn from several federal states and featuring a disproportionate number of girls. The whole stand is branded to reflect our ‘starke Typen’ campaign, which aims to encourage young people, and girls in particular, to pursue a career in the agricultural machinery sector. It translates roughly as ‘strapping lads’, though ‘pick of the crop’ may be more appropriate. And the team members are certainly starke Typen. After all we have several federal and regional winners on board and even the German European master. Participating in this event is a reward and an honour for the team members and certainly looks good on their CVs. They are ambassadors for our industry – on a European scale.

What actually happens at the stand?

Thiesgen: We present and explain our industry and the career opportunities available in it to all visitors, especially to school children, parents and teachers. Together with the DLG, we offer free entry to all schools within a 200 km radius of Hanover. From Tuesday onwards we expect school classes to be arriving by bus. We can accommodate up to 200 people at each show which will start on the hour, with as many as over 50 performances taking place throughout those seven days. Our Workshop LIVE stand features two tractors, one big baler and a drill combination. In addition there are an infinitely variable transmission and a knotter on display which were removed from their machines for practicing on. Furthermore, we will be servicing a chainsaw and holding competitions to see who can change a tyre in the fastest time. Girls versus boys.

Each show – no two are alike – will be moderated by an industry outsider. The person will ask the team mem-
bers to explain what they are doing and why, what kind of plans they have for their future, what they find so fascinating about the industry and the machinery, what prompted them to do the apprenticeship and where they see themselves in 10 years’ time. The moderator will also bring in teachers, experts, passers-by, trainers and alumni in a variety of ways.

Everything will be filmed and shown live on a huge screen above the stand and streamed online and compressed into video clips so the audience can access the information at a later date. Even the BBC has reported live from Workshop LIVE in the past!

Federal Minister Andrea Nahles is a patron of the ‘starke Typen’ campaign featured at the Workshop LIVE stand. How did this come about?

Thiesgen: Andrea Nahles, the German Minister for Labour, responded in a straightforward letter that she was very willing to take on the role of a patron. Ultimately this is a campaign that pulls an entire industry together in the same direction – not just dealers and manufacturers, but every service provider within the industry, representing an estimated 500,000 jobs throughout the EU. Without agricultural machinery there would be no agriculture, and that applies the whole world over. In global terms our sector is one of the key 21st-century industries. If it acts in a concerted manner, a responsible government will not fail to support it. And who knows – perhaps we will be able to welcome the Minister in person should her busy schedule allow it. That would be another highlight for Workshop LIVE!
Besides Workshop LIVE and the Dealer and Service Centre, AGRITECHNICA 2015 will once again feature the Information Centre for the Used Machinery Trade, with small stands ranging from 12 to about 60 m² for dealers, dealer groups, exchanges etc. You’ll find it right outside the new Dealer and Service Centre in the eastern part of Hall 2 (by the entrance to Hall 3).

Used machinery is not something you’d automatically associate with AGRITECHNICA. After all, the World’s No. 1 sees itself primarily as a source of innovation for the industry and not as a second-hand machinery show. But the organizers are happy to include it, given the important role the trade plays at the event: providing advice on manufacturers’ stands (key suppliers), organizing transport for farmers and VIP customers in the form of buses, trains and even some special flights, and even as exclusive customers on the two exclusive days (formerly ‘Dealer Days’). Up until 2005 dealers’ interests were barely represented at AGRITECHNICA at all, so the trade did not really have its own home at the event. But for the past 10 years there have been three special features covering key trade issues: the Information Centre for the Used Machinery Trade, Workshop LIVE and the new Dealer and Service Centre, all of which are located right next to Hall 2 by the North 2 entrance.

Like last time, various dealers and trade associations will be presenting their used machinery and allied services in Hall 2. Their main target groups are German and foreign farmers and contractors, and the focus will be on sustained machinery sales with an option for follow-up business ranging from after sales to employee training and staff exchanges. In the past many dealers have made international contacts that have proved fruitful for all parties. Later in the summer we will be publishing a separate flyer on this subject entitled “Used Machinery Trade Fair Guide“.

Look out for more information from August onwards at agritechnica.com

Ludger Gude
Vice-president of LandBau-Technik Bundesverband, the German Agricultural and Construction Machinery Association, and General Manager of LVD Krone GmbH

LVD Krone is a John Deere dealer operating 16 dealerships in three sales regions across Germany.

Flyer on the Information Centre for the Used Machinery Trade

This flyer provides a list of all exhibitors at the Information Centre. More details can be found on the AGRITECHNICA website.
Christian Thomsen (DK)
Vemas A/S DK – Deutz Fahr dealer
We arrange an AGRITECHNICA bus tour for our customers, because AGRITECHNICA can show EVERYTHING within the industry. It's the producers' largest shop window and we can also arrange guided Danish speaking tours on our suppliers' stands. Our customers can see different machines we might not know here in Denmark, so it can be an appetizer for customers. And geographically Hanover is a good location to travel to from Denmark.

Alain Dousset (F)
DOUSSET MATELIN
Ex-President of the French Dealers Association SEDIMA and CLIMMAR President until 2014
Citius, Altius, Fortius, (faster, higher, stronger) – the motto of the Olympic Games could clearly apply to AGRITECHNICA as well. But you could also say latius (larger) or maius (bigger), because the machines get bigger every year to deliver higher performance and more productivity… It was here that I first saw a trailed sprayer with a capacity of 12,000 litres.

Jörg Studer (CH)
President of the Agricultural Machinery Association and member of the Board of the Swiss Metal Union
As recognition and thanks for their magnificent work, our organization’s sales staff and directors are regular visitors to AGRITECHNICA. This show is a chance for us to meet our manufacturers’ staff. We also take the opportunity to analyze our competitors and identify product innovations and trends in the industry. We love how easy it is to maintain our network, share ideas with CLIMMAR contacts and make appointments for visits to suppliers.

Carl Lindell (S)
CEO Axima Group AB, President of the Swedish Dealers Association Maskinleverantörerna
The AGRITECHNICA trade fair is becoming more and more important for dealers all over Europe. National fairs are currently having problems getting exhibitors, after all the customers want to see the latest products and the full range available in the market. At the moment, AGRITECHNICA is the only fair that can offer this. Even from a ‘remote’ country like Sweden it is easy to get to AGRITECHNICA. Especially for the dealers and customers in the south of Sweden, AGRITECHNICA plays an important role for business.

Engelbert Pruckner (A)
Chair of ARGE Landtechnik
As chair of ARGE Landtechnik, I always find AGRITECHNICA a fascinating place for meeting colleagues and discussing technical challenges. Naturally, I am also interested in finding out what’s new: it never ceases to amaze me what outstanding technical performance our industry is capable of achieving.

Joost Merckx (B)
CLIMMAR Vice-President and New Holland dealer
Visiting AGRITECHNICA is clearly a must for any professional dealer. It is an ideal technical and business platform and for me it is the opportunity to keep up with the (r)evolution in agricultural machinery. I meet business colleagues from other countries and these contacts give me insights into new strategies and how to adapt my small family company to an ever changing market. My grandfather soon realized that the only way to survive as a (small) manufacturer of agricultural machinery, is to open your eyes and widen your horizon. AGRITECHNICA is the best place to learn more about state-of-the-art machinery.
The trade fair on systems, modules, components and accessories for agricultural machinery and related industries.

Under the roof of AGRITECHNICA, the world’s leading trade show for agricultural machinery, SYSTEMS & COMPONENTS provides an international platform to present mobile application systems and components that are geared to the agricultural machinery and related industries.

Vital part of a greater whole

Over the last decades, agricultural machines and their components have developed into highly complex systems that integrate a vast range of mechanical, hydraulic, electric and electronic components interacting in innovative mobile applications.

Systems and components play a vital role in innovative mobile machinery and relate to such concepts as dependability, efficiency, environmental protection and safety. Nowadays manufacturing processes differentiate into the production of systems, modules, components, and parts which are all integrated into complex networks. This differentiation is reflected by Systems & Components which went on show for the first time at AGRITECHNICA 2013. Orchestrating all these systems, modules and components into integrated systems is the art that creates modern mobile machines and this requires extensive networking among people and companies. The focus of this show space is on an optimized interaction of the various components that make up a mobile machine. Yet any optimization requires communication among people.

New hall

The ‘Systems & Components’ show space has moved to Halls 15-17. Here, visitors will find anything that is of interest to researchers, developers and purchasers, but also to ordinary customers – from a basic hose clamp or hydraulic fitting to advanced CVT gearboxes or powerful 500hp engines.

This is the place to meet and make new contacts with international trade visitors from procurement, sales, R&D as well as with farmers and contractors.

Further information:
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r.talarico@DLG.org

Match & Meet

‘Match & Meet’ is a free business contacting service that helps you set up new international business partnerships, offering you the opportunity to contact trade visitors and exhibitors and arrange meetings in Hanover before the show opens its gates.

Registration will start in September.

For further information please go to agritechnica.com
More and more companies and agricultural businesses are having problems finding suitable staff. The agricultural industry is forecast to have skills shortages intensify in the future. For this reason it is vital that the industry communicates its opportunities to the public and promotes itself as an employer.

So this year, for the first time, AGRI-TECHNICA sees a special area dedicated to such issues as jobs, further training and careers, as well as science and research. This 'Campus & Career' space provides a central point of contact for visitors seeking advice on careers in agriculture and the agricultural machinery industry. The point of contact aims to appeal to newcomers to the industry by answering questions such as “what training opportunities and careers are available in agriculture?” or “what makes the industry particularly attractive?”

Alongside personnel recruitment and training exhibitors, 'Campus & Career' will also host established opportunities as offered by the Young Farmers Day, the Campus and the DLG Careers Advisory Service. In addition, universities and research institutes participating in the scheme will provide an overview of ongoing trials and research findings.

Complementing this offering, the 'Campus & Career' stand also features a stage, a red sofa and an activity platform where visitors can enjoy a fascinating range of informative events.

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Varying expectations: investment confidence in agriculture on a downward trend but still at a high level.

Farmers in Europe have different expectations of how their business will perform in the next twelve months. While operators in Germany and the UK expect business as usual, Polish farmers are less optimistic. Meanwhile, farmers in France are taking a much more optimistic view.

**Stability in Germany and the UK, slowdown in Poland, buoyancy in France**

The farming sector will develop at different speeds in the next twelve months (Fig 1). Farmers in Germany do not expect any changes compared with autumn 2014. Arable farmers expect business to remain stable because, despite the bumper harvest of 2014, the brisk export market has supported prices. Although prices are expected to remain under pressure during the current year, contracts offer the opportunity to fix the unexpectedly high level of grain prices, at least for non-bulk deliveries. Milk producers are less confident about the next twelve months. Currently, strong exports due to the weak euro are holding up prices, but the global glut in milk supplies means minimal price movement. A recovery in milk prices is not expected before the end of the year. Expectations of pig farmers for the next twelve months are also down on autumn 2014.

Farmers who were surveyed in the UK also have varying expectations. While arable farmers and milk producers are less optimistic about their business, pig farmers gave a more positive response. In contrast to the prices in many parts of the EU, pig prices in the UK have held steady at a high level of around €1.70/kg despite noticeable downwards pressure. Farmers expect stable prices in the coming months and thus profitable business.

Arable farmers as well as milk and pig producers in Poland are less optimistic about business prospects for the next twelve months. African swine fever and the continuing import ban imposed by Russia have depressed the current mood and business expectations for the next twelve months. Farmers in all sectors of production are forecasting minimal movement in their markets and a potentially volatile economic situation.

Contrary to the trend in the aforementioned countries, business prospects in France are looking much brighter. In recent weeks, the French farmers once again began exporting grain, which has pushed producer prices into positive territory. Milk producers are expecting more favourable performance than they were in autumn 2014. The end of the milk quota system has opened up new scope for development since 31st March, before which date only

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**Figure 1: Expectations of business development**

[Graph showing expectations of business development from Autumn 2006 to Spring 2015 for Germany, France, UK, and Poland. The x-axis represents the years from Autumn 2006 to Spring 2015, and the y-axis represents expectations ranging from 1 to 5, with 1 being very poor and 5 being very good. The graph shows a general downward trend from Autumn 2006 to Autumn 2014, with a slight improvement in Spring 2015. The bars for Germany, France, UK, and Poland are shown in different colors.]

Spring 2006 - spring 2015, average values; N = Valid cases; facilitated; only one answer possible.
limited transfer of quotas between regions was possible. Producers are also expecting an increase in prices.

**Less appetite for investment in Germany, the UK and Poland, more in France**

Investment confidence in Germany has declined from 51% to 46% since the autumn 2014 survey. Arable farmers (-5%) and pig producers (-3%) in particular are displaying more reluctance to invest during the next twelve months (Fig 2). For those farmers who are investing, the main focus is on optimization of current production, since growth at individual producer level is being made harder by the sharp rise in field management costs and legal compliance costs. The willingness of milk producers to invest is holding fairly steady at 53% compared to 54% in autumn 2014. Dairy farmers want to increase productivity in the barn and in fodder production and to use their operational capacities more efficiently.

In the UK, the propensity to invest has declined by 7% compared to autumn 2014. Currently, 48% of the farmers surveyed are planning some form of investment in the next twelve months. The figure among arable farmers is significantly lower. Whereas 57% of respondents in autumn 2014 intended to invest, the latest survey reveals that this figure has now gone down to 47%. Although milk producers also plan to invest less, the proportion still remains relatively high at 55% compared with more than 63% in autumn 2014. Pig farmers are more enthusiastic about investing, with spending forecast to increase by an impressive 12% to 63%. The above-average price for pork compared to the rest of the EU taken together with stable business prospects is bolstering the willingness to invest.

In Poland, investment confidence has declined slightly but remains at a high level, with 46% of Polish arable farmers (-4% compared to autumn 2014), 50% of dairy farmers (-6%) and 47% of pig farmers (-2%) looking to invest during the coming twelve months. They aim to focus on expanding their core businesses. Polish farmers will thus be continuing along the route of expansion and modernization.

The situation in France is characterized by a modest recovery in investment activity: whereas only 14% of farm owners were willing to invest in autumn 2014, the latest survey shows that this has gone up to 21%. While the propensity of pig farmers to invest has gone down by 4% to 20%, the investment confidence of arable farmers has increased by 6% to 15% and of dairy farmer by 8% to 29%. The end of the milk quota system has opened up new opportunities for business development now that the transfer of delivery rights between regions is no longer severely restricted.

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**Conclusion**

The results show the widening differences between European markets in terms of opportunities for development. Whereas farmers in Germany and the UK are focusing on the optimization of production, farmers in Poland are thinking primarily of opportunities for expansion.

**Further information available at** www.DLG.org/trendmonitor
THE EUROPEAN USED TRACTOR MARKET

The used machinery market for tractors in Germany and Europe is subject to a wide range of external factors, including some that are politically motivated and some that are determined by the manufacturer or national government. Hence, the economic implications are not always predictable. For this reason, it is important to conduct regular in-depth market surveys. An export analysis carried out by LandBauTechnik, the German Agricultural and Construction Machinery Association, showed that the Netherlands, Spain and Greece import from Germany considerably more tractors of certain power classes than would actually be justified by the needs of their domestic markets. From Spain, the surplus was mainly shipped on to North Africa, Central and South America, and from Greece to the Middle East. In the case of the Netherlands, the extra machines often went on to Poland, a somewhat surprising though not inexplicable finding.

The international second-hand machinery market has been somewhat obscured until now. It takes great effort to obtain a complete overview of the prices commanded by different brands by power bracket and age. There have recently been a number of interesting approaches to making this aspect of the market more transparent. The Information Centre for the Used Machinery Trade in Hall 2 provides practical assistance in this regard.

A statistically reliable and current source of information is the recent Gebrauchtmaschinenreport Traktoren zu den Jahren 2010 bis 2014 (Used Machinery Report: Tractors 2010 - 2014).

Published by Lectura, the leading provider of data, reviews and statistics on machinery, this report contains information about almost 120,000 used tractors which were put up for sale over a period of five years in countries all across Europe. Based on this wealth of data from a variety of online and offline forums and auctions, the report analyzes the European market by dividing it into four horsepower classes.

Why is this important?

Until now, agricultural machinery dealers have known their regional market inside out; furthermore, they have rarely had to search according to machine, make, age, operational hours or price.

So if you want to know

• which machines sell best in which country,
• which is the best European country for buying or selling compact or high-horsepower tractors,
• or which brands are most popular on the wholesale markets and how many hours’ service they put in,

you will find the corresponding reviews and statistics in the used tractor report published by Lectura.

You will find two spreads on the right-hand side.
Manufacturer overview 2010 – 2014

This graph shows used tractors of all power classes. These are machines that were offered for sale as second-hand tractors in the developed markets of Europe between the years 2010 and 2014. The survey covered 117,276 machines, which were ranked by brand in the following order:

- John Deere, Case IH, New Holland, Claas, Fendt, Deutz-Fahr, Renault, Same, McCormick, Steyr (these manufacturers account for over 90% of the market).

- John Deere 31.82% / 37,346 pcs
- Case IH 12.94% / 15,184 pcs
- New Holland 12.60% / 14,790 pcs
- CLAAS 8.69% / 10,197 pcs
- Fendt 8.63% / 10,133 pcs
- Deutz-Fahr 6.48% / 7,608 pcs
- Renault 4.99% / 5,854 pcs
- SAME 2.55% / 2,993 pcs
- McCormick 1.86% / 2,188 pcs
- Steyr 1.57% / 1,847 pcs
- Other 7.87% / 9,236 pcs

Further information:
Lectura GmbH
report.lectura.de

Price history for used tractors 2010 - 2014

This graph shows the quarterly price development of used tractors up to a lifetime of 15 years, divided into four age brackets. The list price of the relevant model is given as a reference. The graph shows all power classes for all of Europe.
Exciting and challenging professional contests for the agricultural machinery sector.

Competitions to identify the best exponents of their profession have certain similarities with the Olympic Games: just like elite athletes, top professionals have to go through a marathon qualifying process. In Germany, contestants vie with each other at chamber (Kammer), regional and national level before being entered for the EuroSkills finals. A respectable result in the training or apprenticeship examination is a sound basis. In the case of German contestants, this is at least the second-highest grade (Gut = good), otherwise the chances of progressing any further in the competition are slim. It is actually quite an achievement to be selected as the best among 50 to 2,000 of your peer group who are taking these professional exams at the same time.

EuroSkills is the European Championship for professionals. This is where the best of each professional group drawn from at least six European countries compete against each other. In the 2014 agricultural machinery event, they came from Austria, Switzerland, Germany, the Netherlands, Denmark, France, Sweden and Hungary. Contestants have usually had to take a similar route via regional heats, but in smaller countries they are often put forward by selection committees. Unlike the Olympics, all the people who enter for this competition are amateurs, and indeed that is the intention.

And unlike the national competitions which – in Germany at least – generally take place behind closed doors, the biennial EuroSkills events are a spectator sport and a unique experience for all participants in the true Olympic spirit. There is also plenty of public interest: French colleagues claim that 40,000 mainly younger visitors watched the approximately 60 professional events; two years before that in Spa, the crowds were similar in size and there was daily TV coverage. EuroSkills is career guidance on a grand scale and

“Europe’s finest are pitted against each other at EuroSkills”
represented Germany last time: “I arrived in Lille with mixed feelings but have to say that the whole thing will always remain in my memory as a great experience. That would have been true even if hadn’t won.”

**Thorough preparation**

It is of course necessary to prepare for the contest. For example, all forty members of the Team Germany squad coming from different professional backgrounds get together three months beforehand and size each other up while the team management and coaches tell them what to expect during the three days of competition. Everything is planned with military precision. About two months before the event, the relevant organizer – in the case of agricultural machinery, that is obviously CLIMMAR – draws up a shortlist of the machines that the contestants will operate in sequence. There are specialists referred to as ‘coaches’. Each contestant has a coach from his or her country who is involved in setting the tasks and who looks after his or her own entrant. The coach is the only person with whom the contestant may discuss technical matters during the competition. However, any preparation of a more intensive nature is prohibited by the rules. In contrast to the WorldSkills contest, for which several years of special training is not uncommon, especially in Southeast Asian countries, EuroSkills continues to cherish and uphold its amateur status.

The field of contestants at the last EuroSkills in October 2014 in the northern French city of Lille was seven. Due to outstanding performances from Daniel Patzelt of Germany and Giel Buijs from the Netherlands, two gold medals were awarded, with bronze going to Benjamin Schmid from Austria.

**A biennial event**

EuroSkills is held every two years, which is particularly unfortunate for the people who win national championships in one of the alternate years, because each country is allowed to send only one representative. The next EuroSkills will be held in the week of 30th November to 4th December 2016 in Gothenburg, Sweden. Even for non contestants, this is a must-see event!

**Further information:**

**National-level competition in Germany:**

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**How is the competition organized?**

EuroSkills is a biennial Olympic-style event staged over several days and hosted by a major European city. To qualify, a contestant must be the national champion of his or her country. In Germany, contestants must first successfully complete their training and achieve the best grade in their guild or local chamber of trade and commerce exam to take the title of Kammersieger. They then go on to compete at regional level for the Landessieger title. The regional winners are then invited to an annual master class some time during October. In a one-day competition, the top three are chosen at national level, with all other entrants being classed as equal fourth. Every two years, the national winner is entered for EuroSkills. The last such event was held in 2014 in Lille (France) and the next is scheduled for the week of 30th November to 4th December 2016 in Gothenburg (Sweden).

**Winners of the European awards 2008 – 2014**

<table>
<thead>
<tr>
<th>Year</th>
<th>Location</th>
<th>Gold</th>
<th>Silver</th>
<th>Bronze</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>(Aarberg, CH)</td>
<td>Tobias Fürst (CH)</td>
<td>Anthony Halbout (F)</td>
<td>Sebastian Bartsch (D)</td>
</tr>
<tr>
<td>2010</td>
<td>(Biddinghuizen, NL)</td>
<td>Gosse Koerts (NL)</td>
<td>Benjamin Wuthrich (CH)</td>
<td>Jonathan Brodbeck (D)</td>
</tr>
<tr>
<td>2012</td>
<td>(Spa Francorchamps, B)</td>
<td>Helmut Scheidl (A)</td>
<td>Stefan Habegger (CH)</td>
<td>Michel van de Loo (NL)</td>
</tr>
<tr>
<td>2014</td>
<td>(Lille, F)</td>
<td>Daniel Patzelt (D)</td>
<td>Giel Buijs (NL)</td>
<td>Benjamin Schmid (A)</td>
</tr>
</tbody>
</table>

**Responsible for EuroSkills at CLIMMAR:**

Gilbert Daverdisse,  
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AUTHORIZED DEALERS’ SATISFACTION
WITH THEIR TRACTOR BRAND

The DSI – a tool which helps to forge genuine partnerships with manufacturers.

If dealers are satisfied with their product, they will be far more successful at selling it. There is a close correlation between brand satisfaction and sales success in many industries. CLIMMAR, the European umbrella organization for national agricultural machinery associations and their member companies, first set the ball rolling in 2008 when six of its 16 associations conducted a survey in their home countries. Originating in France and translated from French into the individual languages, the survey used identical wording in all countries. The national results were then compiled by CLIMMAR at European level.

Given that decisions in manufacturing companies tend no longer to be taken at national level but rather at European or even global level, CLIMMAR felt it was important that the results of the survey provided dealers with a tool that enabled them to assess the quality of the partnership between dealers and manufacturers: the Dealer Satisfaction Index (DSI).

The questions, formulated in the spirit of mutual cooperation, are designed to provide statistically reliable statements about how well or poorly a particular manufacturer scores from a marketing perspective. The DSI can be regarded as an affordable development tool which enables tractor manufacturers to shape their marketing policies, and one that operates both at national and international level since it enables comparisons to be made between individual countries. It is important to bear in mind that in giving their opinion, dealers are not rating the product which they sell, but are enabling a statement to be made about the quality of the manufacturer’s relationship with its various dealers.

Although the survey has grown and some aspects have been added since it was introduced in 2008, but its structure and the questions have remained identical in all languages. The number of respondents has steadily increased and several CLIMMAR member states have extended the survey to include further industries, for instance in Germany it now covers also power tools and in the Netherlands livestock and milking equipment. The results of the survey always generate a great deal of interest. They are evaluated by the brand’s national representatives from trade and industry, asking: “How can we work together to improve?” In many countries the DSI is virtually the only tool to get into contact with the manufacturer to achieve this.

At present the DSI survey is routinely conducted in Germany, Belgium, Denmark, France, the Netherlands, Poland, the UK and Switzerland. Over 1,200 authorized dealers representing around 15 tractor brands took part in the summer 2004 survey. The most recent European results were presented at the CLIMMAR congress in Stockholm, which ran from 15 to 18 October 2015. In general, access to the individual national results is exclusively reserved to the relevant member associations – so for instance the German agricultural machinery and construction association (Land
BauTechnik-Bundesverband always presents the previous year's results at their January conference where it awards certificates of achievement to the 12 manufacturers rated.

Presently the survey is composed of 14 different sections, numbered I to XIV, each listing about five questions. We have compiled the results of some of these questions and how they developed through the period between 2011 and 2014. A score of 20 indicates maximum satisfaction (school mark 'A'), whilst zero denotes maximum dissatisfaction (school mark 'F').

Further information:
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anne.fradier@sedima.fr
### Organizer: DLG e.V.

<table>
<thead>
<tr>
<th>Tickets</th>
<th>Price</th>
<th>Validity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day ticket</td>
<td>24 EUR</td>
<td>Valid for one day from 10 to 14/11/2015</td>
</tr>
<tr>
<td>Two-day ticket</td>
<td>36 EUR</td>
<td>Valid for two days from 10 to 14/11/2015</td>
</tr>
<tr>
<td>Season ticket</td>
<td>60 EUR</td>
<td>Valid for the whole period from 10 to 14/11/2015</td>
</tr>
<tr>
<td>Preview Day ticket</td>
<td>75 EUR</td>
<td>Valid on 8 or 9 November 2015</td>
</tr>
<tr>
<td>Students/pensioners/disabled visitors</td>
<td>13 EUR</td>
<td>Valid for one day from 10 to 14/11/2015</td>
</tr>
<tr>
<td>Children up to age of 12</td>
<td>free admission</td>
<td>accompanied by adults</td>
</tr>
<tr>
<td>DLG Members</td>
<td>free admission</td>
<td>Free admission on presentation of the DLG Membership Card as of the second Preview Day, from 9 to 14/11/2015</td>
</tr>
<tr>
<td>Voucher for free day ticket</td>
<td>free admission</td>
<td>If you received a voucher, you can register online at agritechnica.com to convert it into a one-day ticket. Valid for one day from 10 to 14/11/2015</td>
</tr>
</tbody>
</table>

### Hotel service:

- **Hanno Fair Incoming, Anette S. Burgdorf,**
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  - Tel: +49 5321 352020, Fax: +49 5321 352021
  - E-Mail: info@hanno-fair.de, Web: www.at.hanno-fair.com
- **Hannover Marketing & Tourismus GmbH**
  - Vahrenwalder Straße 7, 30165 Hannover, Germany
  - Tel.: +49 511 12345-555, Fax: +49 511 12345-556
  - E-Mail: hotels@hannover-tourismus.de, Web: hannover.de/hotels/agritechnica

### Travel partners:

In many countries we have partners who will be happy to help you with your travel arrangements. As required they can find an accommodation, organize the journey, or answer any questions you may have in your own language.

You can find a list of available partners at agritechnica.com/travelagencies.html

### Travel by car:

You can reach the Exhibition Grounds directly via autobahn/motorway A2 and A7 and then A37 and the Messeschnekelweg (exhibition expressway, B3/B6).

In order to improve the air quality and reduce exhaust emission burdens, ever more German cities - including Hanover – are introducing Emission Zones indicated by signs ("Umweltzone"). Only vehicles bearing an official permit sticker may enter these zones. The Exhibition Grounds are located outside Hanover’s Emission Zone. However, for many parts of the city you need the green special permit sticker introduced on 1 January 2009.

### Travel by rail:

Selected regional and long-distance trains will also include an extra stop directly at the Exhibition Grounds in Hanover/Messe Laatzen. Travel times will be published on the rail website www.bahn.de as of September 2015.

You can reach the Exhibition Grounds by public transport from Hanover city centre by taking the suburban train (Stadtbahn) U8 or U18.

### Travel by plane:

You can reach Hanover by air using domestic or international scheduled or charter flights. During the exhibition an exclusive AGRITECHNICA Shuttle Service will be operated for you.

For detailed information, please visit agritechnica.com/airport_and_distances.html

### Further information for visitors:

- **DLG Service GmbH**
  - Eschborner Landstr. 122, 60489 Frankfurt am Main, Germany
  - Tel.: +49 69 24788-265, Fax: +49 69 24788-113, E-mail: expo@DLG.org
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