



DOI: 10.5937/ISAE25096M

ISAE 2025 - Book of Abstracts
The 7th International Symposium on Agricultural Engineering
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OVERVIEW OF THE CURRENT VALUES OF THE EUROPEAN AGRICULTURAL MACHINERY DEALERS' SATISFACTION INDEX

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Abstract. The results of the CLIMMAR 2024 DSI survey reflect the improvement of manufacturer-dealer relations and the strengthening of cooperation, as the tractor dealer satisfaction index (DSI) reached its highest value ever. The recent moderate market demand for power machinery in Europe, stagnating sales and increasing competition in the market have forced tractor manufacturers to increase their support to their sales channels in the commercial, marketing and technical fields, and to improve their service levels, which is welcomed and positively assessed by dealers.

The average value of the dealer satisfaction index for the leading tractor brands, which has remained stable in recent years, started to rise in 2024. The last time we saw such an intense positive shift was in 2019, under more balanced machine market conditions.

The ranking of the tractor brands by index value showed some slight and some major movements. There was a change in the top ranking and a significant shift in the middle ranking.

Key words: Dealer Satisfaction Index, agricultural machinery distributors, agricultural machinery manufacturers, trends, CLIMMAR

1. INTRODUCTION

CLIMMAR, the European Agricultural Machinery Dealers Association, has been conducting a survey of machinery dealers in several European countries since 2011. The aim of the Manufacturer-Distributor Relationship Satisfaction Index is to provide dealers with a tool to express their level of satisfaction with the manufacturer's activities and services. (CLIMMAR 2017) (Magó 2015) The National Association of Agricultural Equipment and Machinery Distributors (MEGFOSZ) is a member of CLIMMAR in Hungary and an active contributor to the CLIMMAR Statistical Committee. As a result, from 2018 onwards, Hungarian machinery dealers provide data to help put the Dealer Satisfaction Index (DSI) on a more reliable basis and to provide more comprehensive data. (CLIMMAR 2018) (Magó 2019)



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2. METHOD

In 2024, the determination of the DSI now covers eleven countries (England, Belgium, Denmark, France, Germany, Hungary, Italy, Luxembourg, the Netherlands, Poland, Sweden, and the UK).

The questionnaire itself consists of 15 chapters and 73 questions. Two new groups of questions have been added to this year's survey. The questionnaire also included an evaluation of other self-propelled machines in terms of brand image and marketing. In contrast, the chapter on anti-theft protection has been removed from the survey, as there is no significant difference between manufacturers' actions in this area.

The survey, which was carried out between 2 April and 31 May 2024, resulted in more than 800 completed questionnaires for the top ten tractor brands being received by CLIMMAR's member organisation that processes the data. The composition of the top rated brands has not changed this year. The published results of the survey present the top ten tractor brands with the highest scores, namely Case IH, Claas, Deutz, Fendt, John Deere, Kubota, Massey-Ferguson, New Holland, Same, Valtra.

For tractors, the evaluation covered several areas: brand image or awareness; brand-related marketing; marketing of spare parts, i.e. brand protection against aftermarket parts; quality of IT services; warranty and warranty-related services; and brand awareness. the manufacturer's attitude towards warranty and after-sales service; advertising and product support, i.e. the extent of the manufacturer's contribution to distributors' advertising costs; payment terms and administration; the quality of the training programmes organised by the manufacturer and their price/value ratio; management, i.e. the reality of the manufacturer's strategy and its communication; the quality of the manufacturer-dealer relationship; the contribution to profitability, the suppliers' willingness to help correct weaknesses; assistance in financial financing. (CLIMMAR 2019, 2024) (Magó 2025a)

3. RESULTS

3.1. Dealer satisfaction index values for 2024

After evaluating the responses, CLIMMAR ranks the brands according to the overall satisfaction index of the dealers.

In the overall dealer satisfaction index for 2024 Deutz came out on top, ahead of Fendt, which has held the throne for the past five years. Claas retained its position, while Valtra made a significant "leap" onto the podium. John Deere slipped to fifth place. It is followed by Same, which is holding on to its position strongly, in sixth place. New Holland is seventh and Kubota eighth. Both have improved two or three positions on last year. Case IH and Massey Ferguson are next, down four and three places respectively from last year. (Figure 1., 2.) (Fradier 2024)

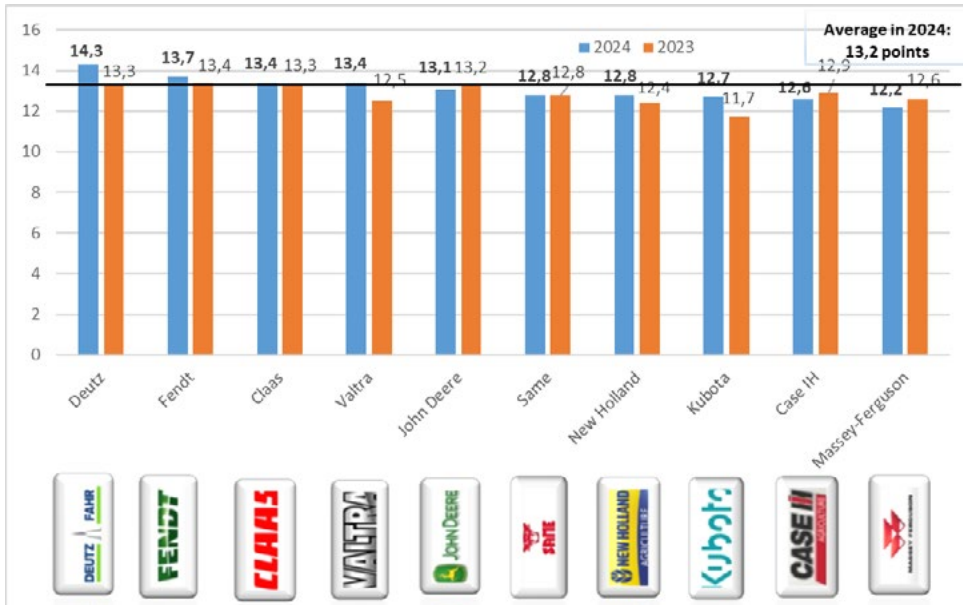


Fig. 1 Dealers' satisfaction index for each brand (own editing, Source: Fradier 2024, CLIMMAR)

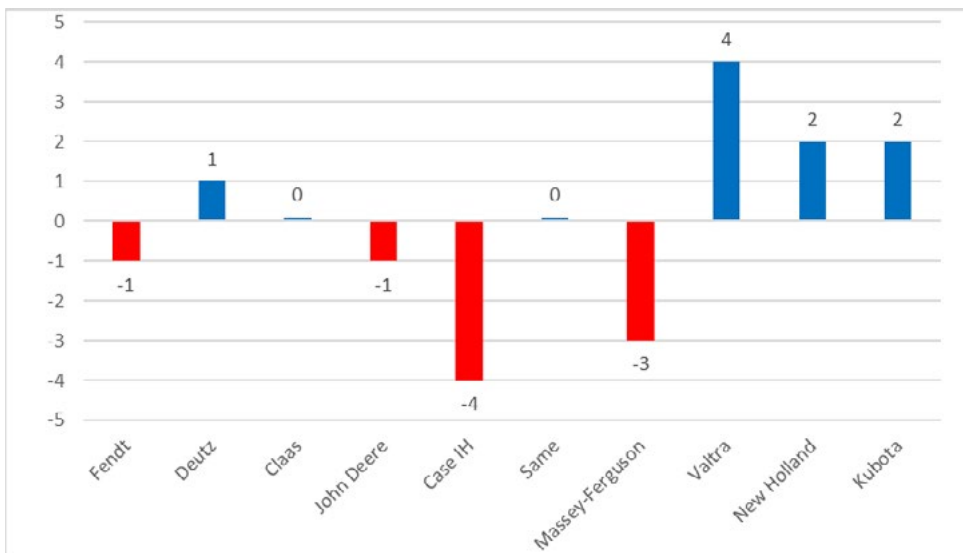


Fig. 2 Change in ranking of tractor brands between 2023 and 2024 (Source: Fradier 2024, CLIMMAR)



Based on the scores achieved, we can divide each tractor brand into four groups. The leader Deutz has moved away significantly by about 0.7 points from the following podium finisher Fendt and by a whole point from Claas and Valtra. The midfield is represented by John Deere, Same, New Holland, Kubota and Case IH with an index point range of 12.6 to 13.1. This is followed by Massey Ferguson in 10th place with 12.2 points, 0.4 points behind.

Looking at the change in the overall scores of each tractor brand over the past year, the most significant, almost outstanding improvements were achieved by Deutz, Valtra and Kubota, putting Deutz at the top, Valtra on the podium and Same in the middle. Fendt, New Holland and Claas made smaller improvements. John Deere's rating deteriorated slightly. Massey Ferguson and Case IH have weakened significantly over the past year (**Figure 3**).

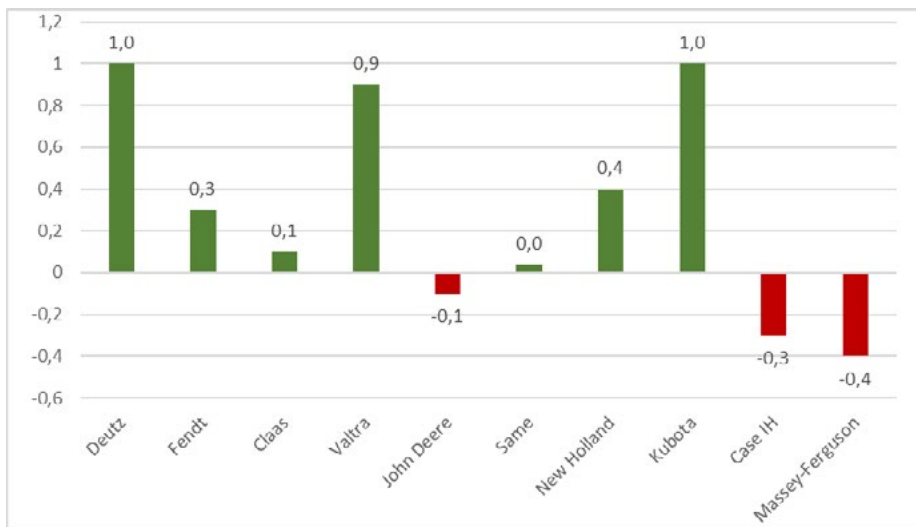


Fig. 3 Change in the aggregate rating score of tractor brands between 2023 and 2024
(Source: Fradier 2024, CLIMMAR)

In terms of the scores obtained, out of a maximum of 20 points, Deutz has 14,3 points, representing a rating of around 71,5 %, and Massey Ferguson 12,2 points, representing a rating of 61 %. The difference between the leading and the last brand is 2.1 points, an increase of 0.4 points compared to last year.

If we look at the change in the indicators for each brand from the start of the survey in 2011, it is clear that Same has made the most significant improvement, increasing its initial score by around 3.1 points. Deutz (2.8 points), New Holland and Kubota also showed an improvement, although the latter's increase was more modest, 0.7 and 0.1 points respectively. Case IH's score is the same as at the beginning. Claas, John Deere and Valtra have seen their scores fall slightly over the years (by 0.1 and 0.2 points respec-



tively), while Fendt and Massey Ferguson have suffered a marked change in their scores, which have fallen by 1.1 points (**Figure 4**). (**Hajdú - Magó 2021**) (**Magó 2025b**) (**Fradier 2024**)

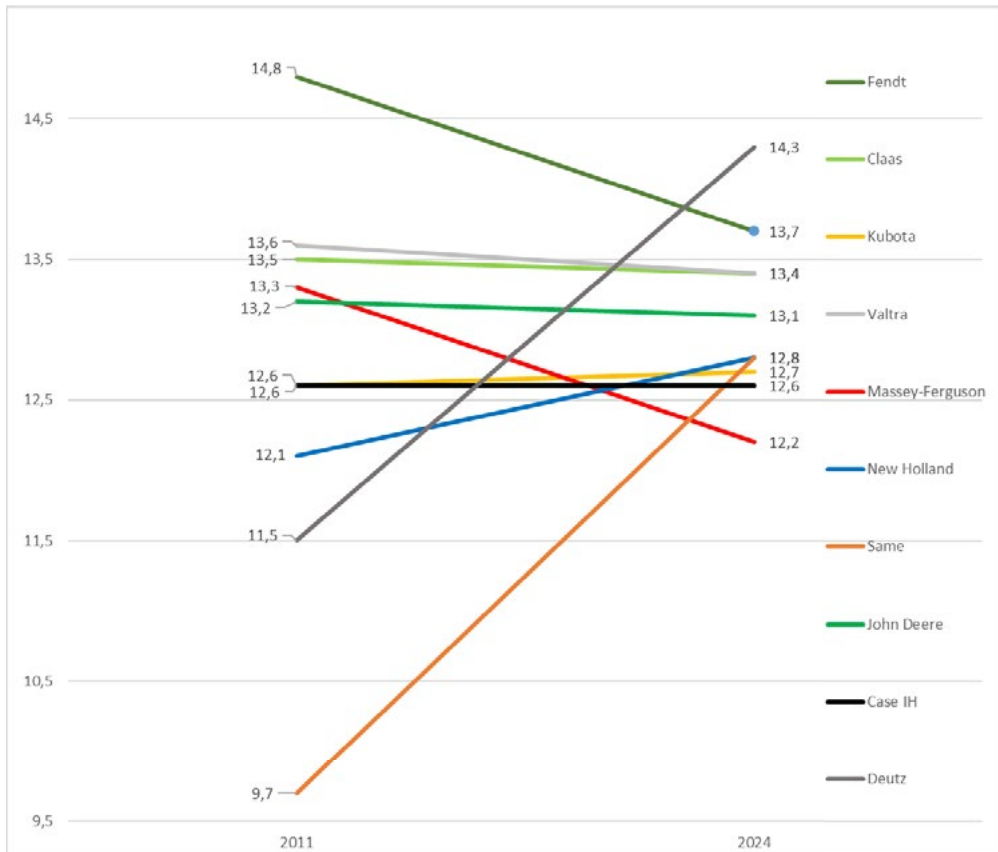


Fig. 4 Change in the aggregate rating score of tractor brands between 2011 and 2024 (own editing, Source: Hajdú - Magó 2021, Fradier 2024, CLIMMAR)

Table 1 shows the values and trends of the 2023 and 2024 DSIs by question group, disaggregated by assessment criteria. It can be clearly seen that in most areas the quality of manufacturer service has been on an upward trend in the last year. The exceptions to this are brand image, manufacturer training, contribution to profitability and improvements. (Fradier 2024)



Table 1 Average value for each group of questions in 2023 and 2024 and the trend of year-on-year change (own editing, Source: Fradier 2024, CLIMMAR)

Question groups	Average in 2023 (points)	Average in 2024 (points)	trend
brand image	14,9	14,6	
marketing	11,1	12,3	
marketing of spare parts	13,5	13,8	
warranty, after-sales service	13,6	13,9	
advertising and product support	11,5	12,4	
payment terms and administration	13,5	13,9	
manufacturer training	13,7	13,3	
management	13,4	13,7	
manufacturer-dealer relations	13,7	13,7	
contribution to profitability	13	12,7	
improvements	12,4	12,3	
financing offers	10,8	10,8	

3.1.1. Assistance in financing offers

The tractor brand rankings within each of the evaluation criteria can be seen to be substantially different from those found for the overall satisfaction index.

If we consider the dealer satisfaction index scores for each brand in relation to the assistance provided by the manufacturers in the financial financing, we can conclude that Deutz performed best, followed by Valtra. Fendt is third in the ranking, and the other tractor brands follow each other in a steadily decreasing order (**Figure 5**).

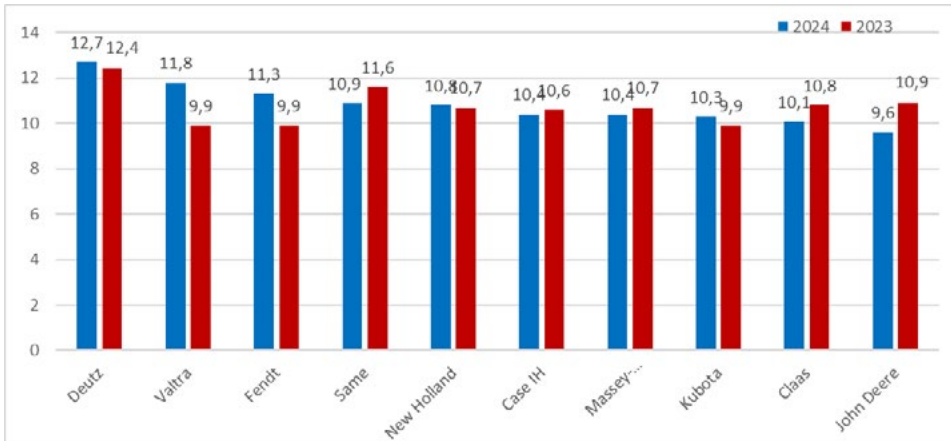


Fig. 5 Satisfaction index of dealers for each manufacturer based on assistance in financing offers (own editing, Source: Fradier 2024, CLIMMAR)

In terms of financing, the ratings of Valtra and Fendt have improved significantly, while Kubota's rating has improved slightly over the past year. This is a significant shift compared to the previous year, when all the tractor brands surveyed were downgraded in 2023. This year, John Deere's rating deteriorated the most, followed by Same and Claas, and to a lesser extent Massey Ferguson and Case IH (**Figure 6**).

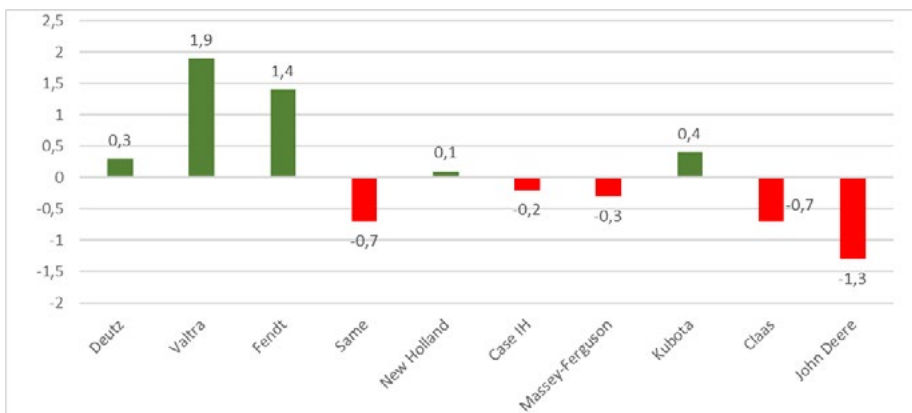


Fig. 6 Change in dealers' satisfaction index from 2023 to 2024 for each manufacturer, based on the assistance provided in the financing offers (own editing, Source: Fradier 2024, CLIMMAR)

3.1.2. Manufacturer-dealer relationship

The other priority area is the quality of the manufacturer-dealer relationship (**Figure 7**). Compared to the previous year, the quality of Kubota and Deutz has improved the

most. They are followed by Fendt, then Valtra, and New Holland. Massey Ferguson's rating remained unchanged in this respect. Claas and Case IH have seen the biggest declines, but Same and John Deere have also lost ratings (**Figure 8**).

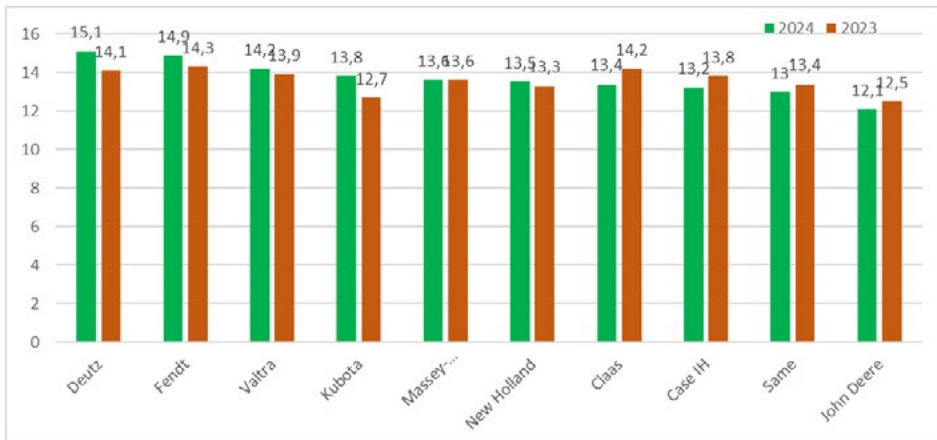


Fig. 7 Machinery dealers' satisfaction index for each manufacturer, based on the quality of the manufacturer-dealer relationship (own editing, Source: **Fradier 2024**, CLIMMAR)

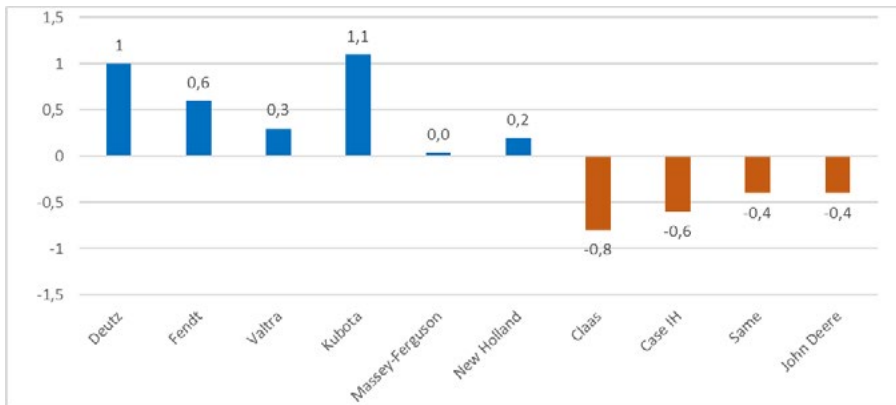


Fig. 8 Change in the satisfaction index of machinery dealers between 2023 and 2024 for each manufacturer, based on the quality of the manufacturer-dealer relationship (own editing, Source: **Fradier 2024**, CLIMMAR)

3.2. Results of the DSI survey in Germany

The survey described above is based on the European-wide database coordinated by CLIMMAR, with 11 countries represented. In addition, individual countries, e.g. Ger-

many, i.e. CLIMMAR’s German member LandBauTechnik e.V., also evaluate questionnaires in their “own competence”, reflecting the satisfaction of German tractor dealers. (Messerer 2024a)

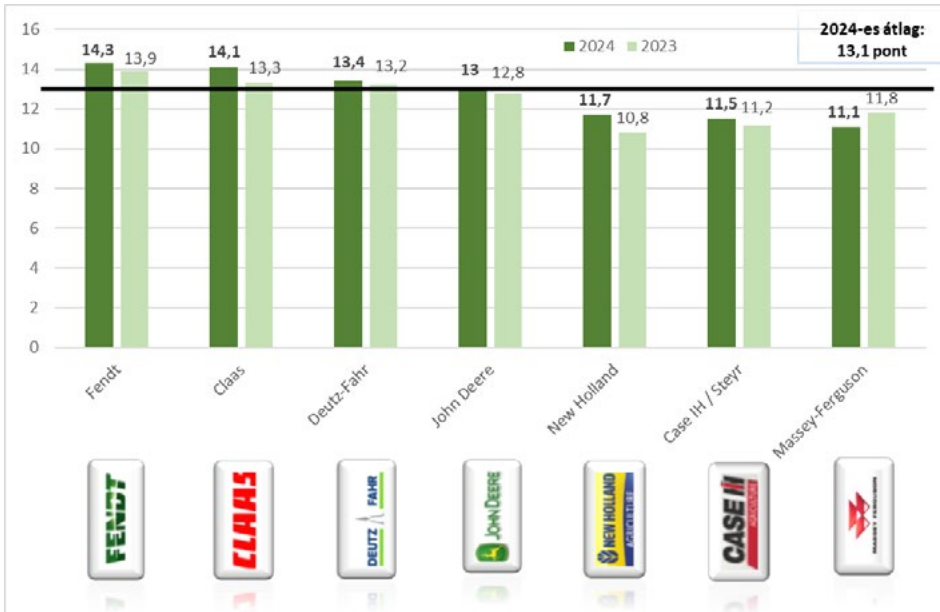


Fig. 9 Satisfaction index of machinery dealers for individual brands in Germany in 2024 and 2023 (own editing, Source: Agrartechnik 10/2024, Messerer 2024a)

These DSI results are country-specific and may differ slightly from the overall European trends. This is well illustrated by the German example, where it can be seen that, although based on a narrower population, the ranking is typical for the most popular tractor brands in Germany, but is close to the European ranking. One notable exception is that the list is not headed by Deutz-Fahr, but by Fendt, which has been the most popular in Germany for some time, followed by Claas in second place. (Figure 9). (Messerer 2024b)

4. CONCLUSIONS AND RECOMMENDATIONS

The survey is not intended to compare individual tractor brands. It is intended to provide a basis for constructive dialogue between manufacturers and dealers to address critical areas. The results of the questionnaire will serve as a tool for manufacturers to work with their sales network to identify and address areas for improvement, to the benefit of both parties. CLIMMAR strongly emphasises that the survey is not a rating of the products sold by the manufacturer. (CLIMMAR 2024)



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