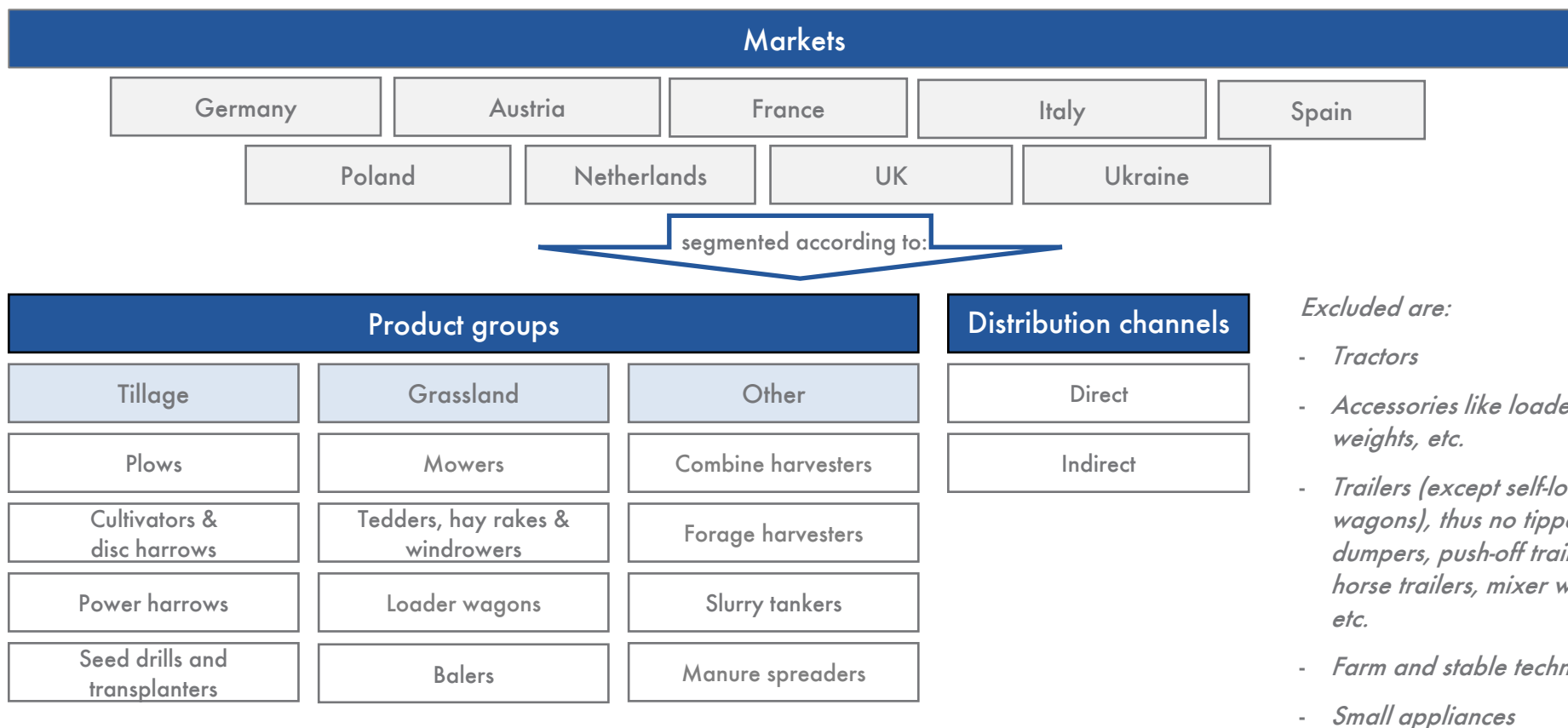


IC Market Tracking Agricultural Machinery in Europe 2018

- Germany
- Austria
- France
- Italy
- Spain
- UK
- Poland
- Netherlands
- Ukraine

- ✓ Overview of the development of the **total market** and the **individual Segments**.
- ✓ **Market Forecasts** for all product segments and regions for the upcoming three years, based on our econometric models.
- ✓ Awareness of **Market Position** and development during the last two years, in comparison with major competitors and with respect to:
 - Total Market
 - Product Groups
 - Types of Machine
 - Distribution Channels
- ✓ Information about the most important **Factors of Influence**
- ✓ Graphic Presentation of the results facilitates the development of your own strategies.





For each segment the total market and market shares of the top players for the last two years and forecasts for the next three years are available in the study

Tillage

Plows

Implement used for breaking up soil and cutting furrows in preparation for sowing. Includes packers and subsoilers.

Cultivators & disc harrows

Tilling implement or machine for seedbed preparation, i.e. cutting, turning and loosening the soil and destroying weeds using shanks or discs. Includes seedbed combinations.

Power harrows

Rotary harrow. Implement with moving vertical tines to loosen the soil horizontally without turning soil layers.

Seed drills and transplanters

Machines for the rapid, uniform planting of seeds or seedlings, e.g. seed drills, potato planters etc.

Grassland

Mowers

Front- or rear-mounted rotary machines for grassland harvesting grass; disc or drum type. Excludes conditioners, mulchers, flail mowers, sledges, trailed corn harvesters.

Tedders, hay rakes & windrowers

Farm implements for distributing and turning over hay and for raking it into windrows.

Loader wagons

Trailed machine for collecting hay or other forage with a pick-up device. Also called self-loading wagon or silage trailer.

Balers

Round and rectangular hay balers, big and small bale presses as well as machines for wrapping bales. Excludes bale grippers, baleloaders und bale transporters.

Definitions and Demarcations 2/2

Other

Combine harvesters

Self-propelled farm vehicle for reaping, threshing and winnowing of crops in a single process

Forage harvesters

Self-propelled farm vehicle for cutting, chopping and loading of grass or silage.

Slurry tankers

Trailed or self-driving machine for transporting and/or spreading liquid animal waste.

Manure spreaders

Muck spreader. Trailed or self-driving machine for distributing manure over a field.

Distribution channels

Direct

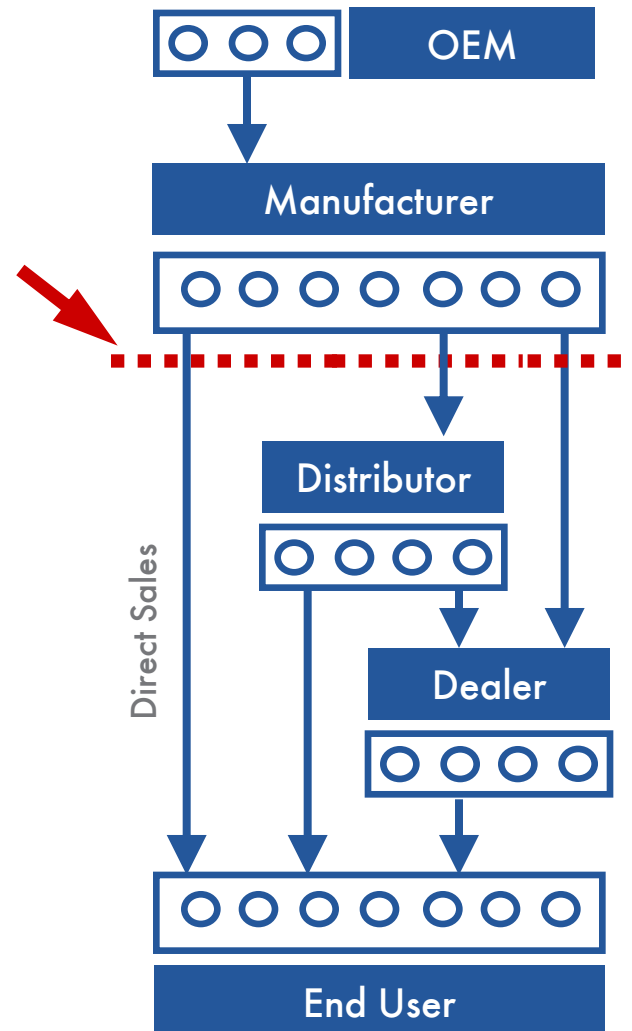
Sales directly to consumers, through own sales staff, internet, etc.

Indirect

Wholesale, retail and all other forms of trade in goods are sold to third parties.

Interconnection measures the total sales at street prices without VAT per branch to the first buyer (without OEM)

Sales are segmented by the first distribution partner.



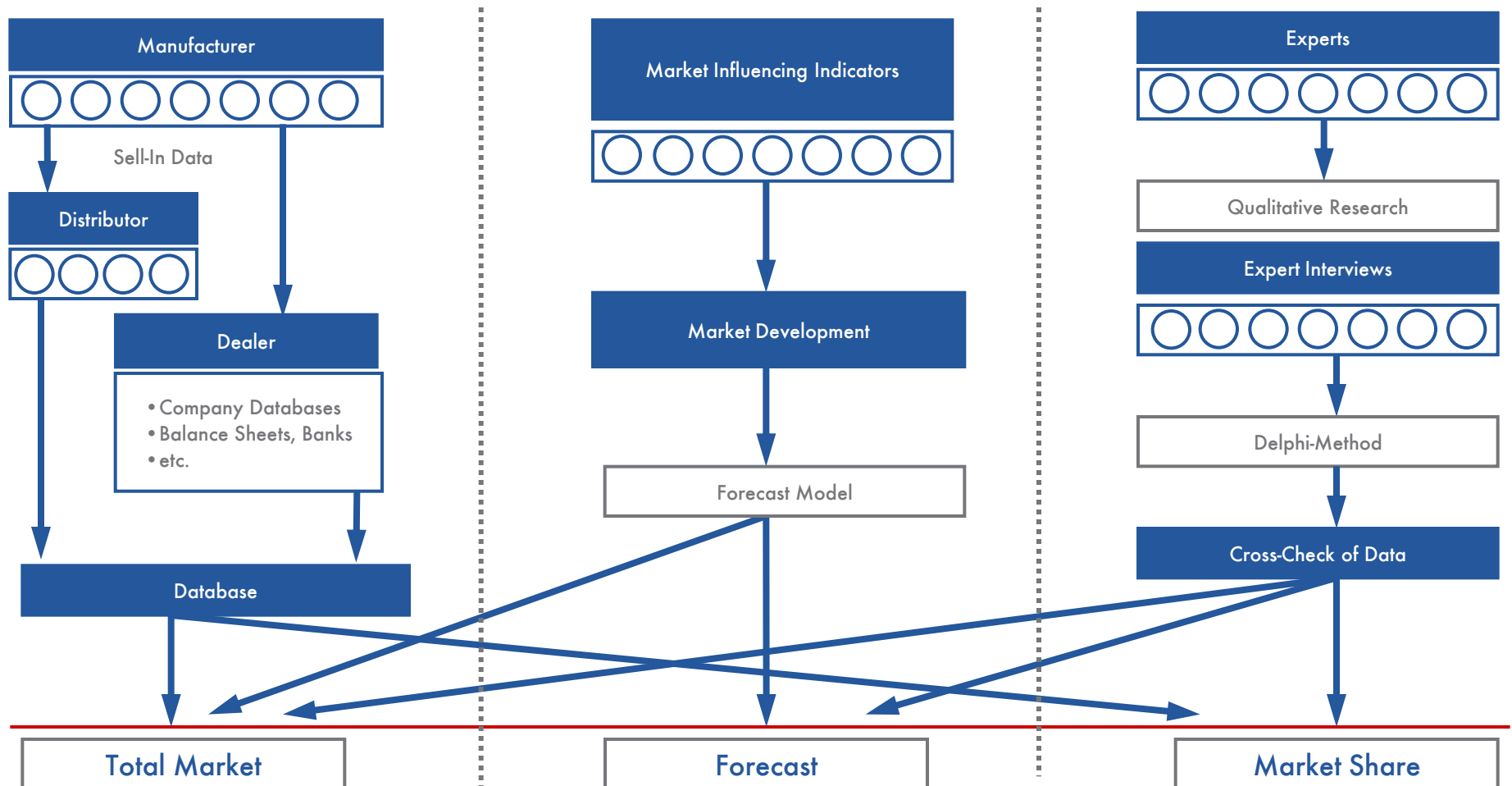
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

Interviews with distributors and specialised dealers act as a cross-check of the data. In addition, investigations of listings and average prices are carried out.

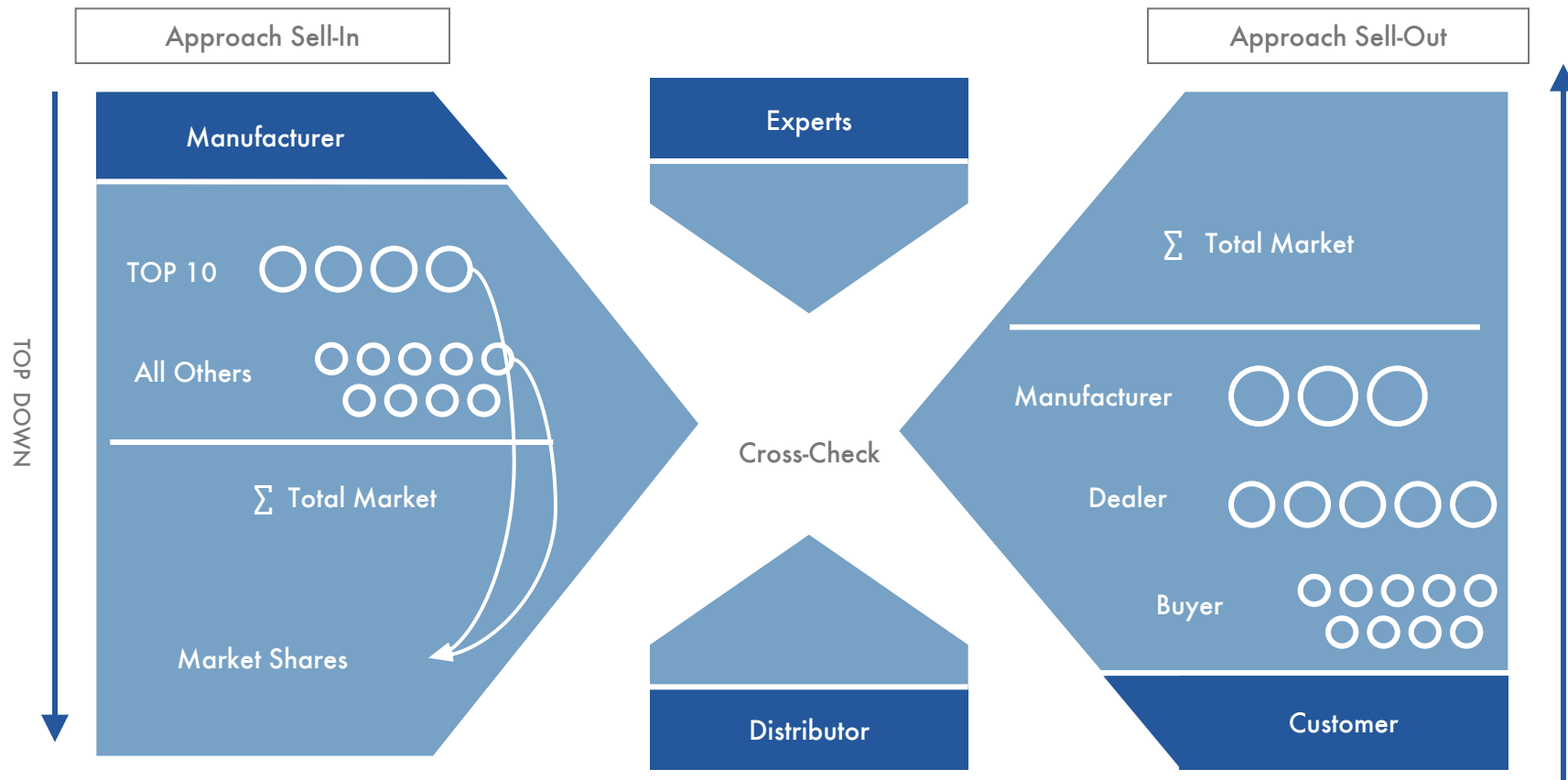
Base of Primary Research by Manufacturers & Experts

Description Structure of Survey Methodology

Methodology



Data of Manufacturers Aligned with Market Calculation



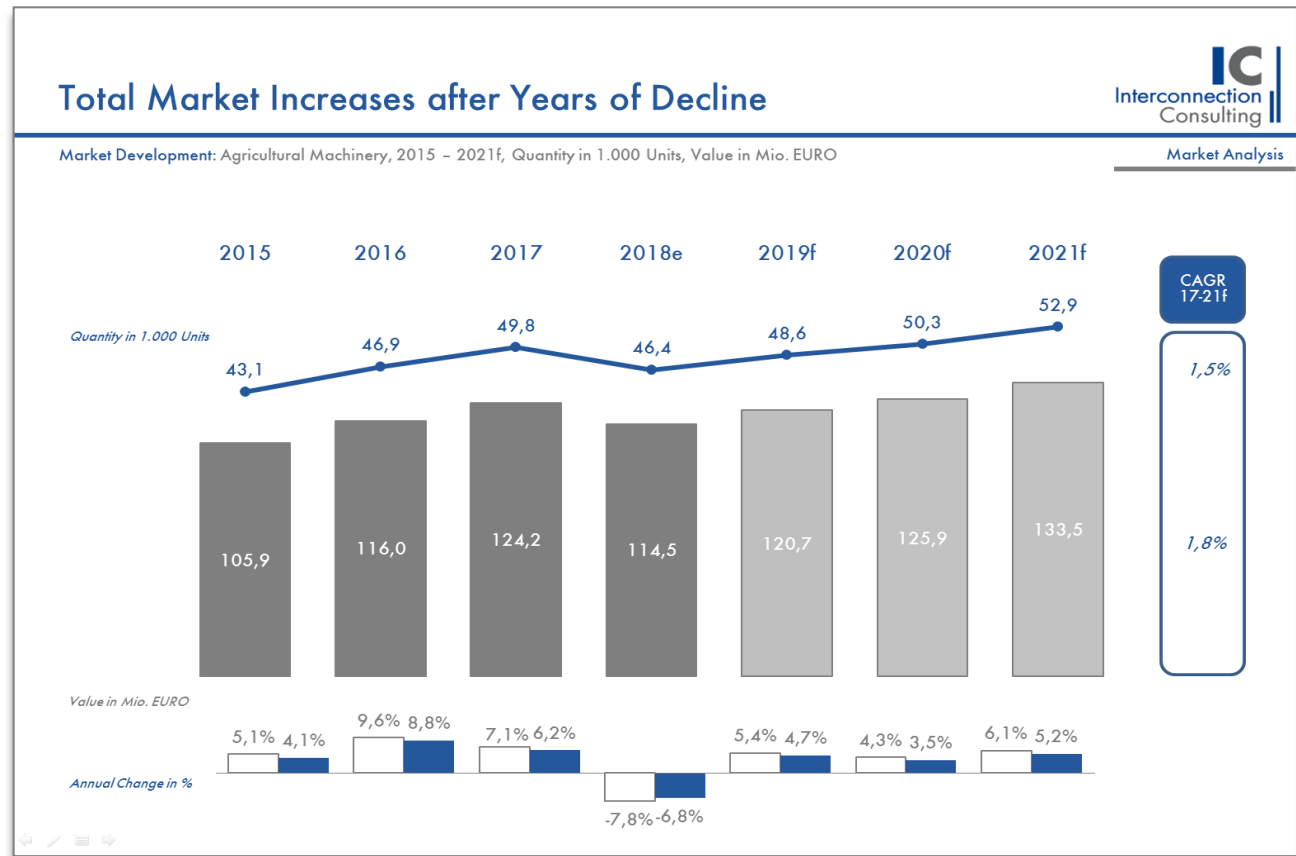
The IC Market Tracking® is modularly built and consists of the following sections:

Content

- The **Introduction** shows the definition and demarcation of product groups, regions, and methodology as well as the objectives of the study.
- The **Executive Summary** gives a short overview of the results of the study and analyses key facts.
- As an introduction key factors influencing the market are analyzed in the **Economic Environment**: You will find the most important data on consumer behaviour, main economic indicators, etc.
- The **Total Market Analysis** shows the development of the market surveyed by value and quantity in different dimensions, such as regions, product groups, and ways of distribution. A forecast for the next years is an essential part of this analysis.
- The **Competition Analysis** shows in detail the development of the top companies in the market by finding out about the market shares in different categories, changes in market position, benchmarks, average prices, etc.
- Finally, all data are documented in the table section, also called **Facts & Figures**. Here you will find all absolute and relative sales figures of the top companies in order to check our results. Company profiles provide you with further practical information on the main companies in the market.

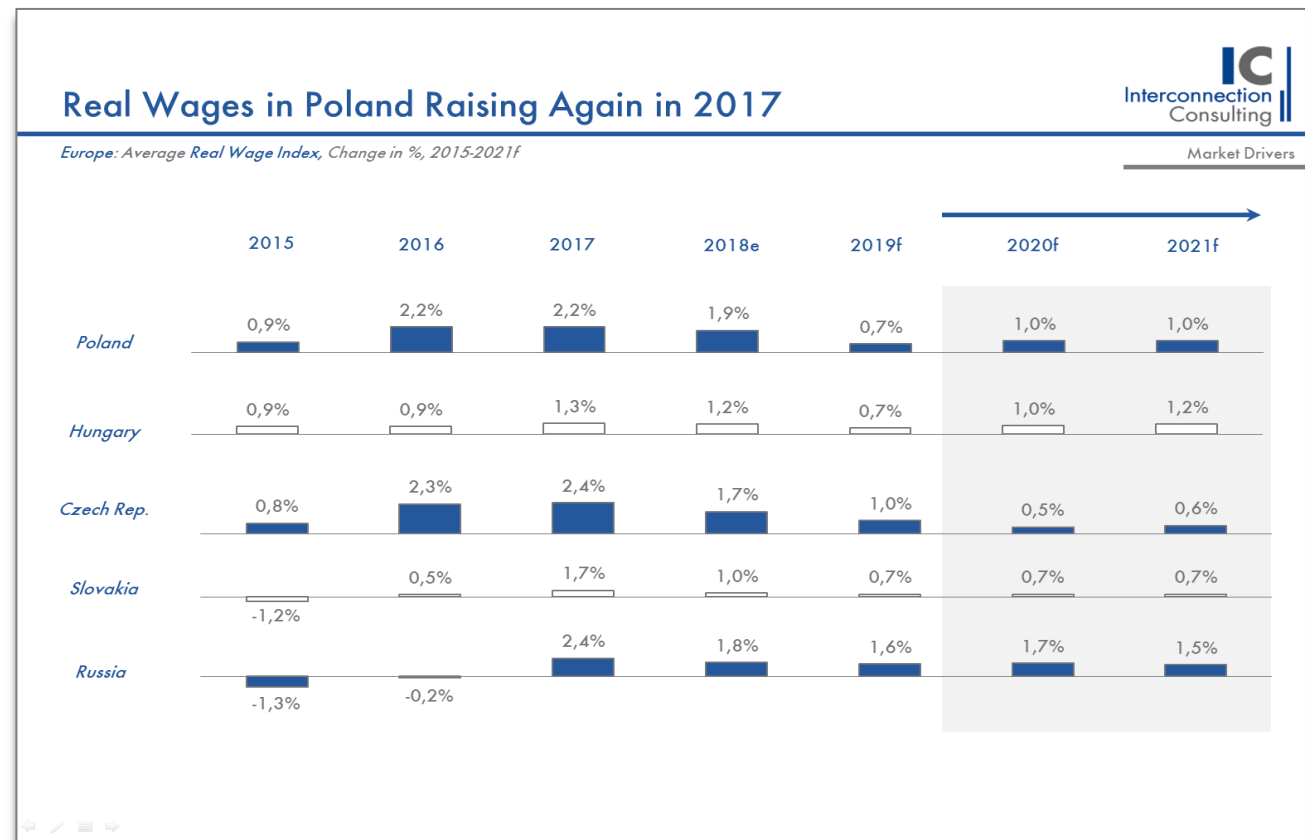
Total Market and Development

- ❑ *Presentation of Total Market & Forecasts for the next three years.*
- ❑ *Overview of Market Development according to regions, market segmentation in different customer segments.*
- ❑ *This Sample Chart shows fictive figures.*



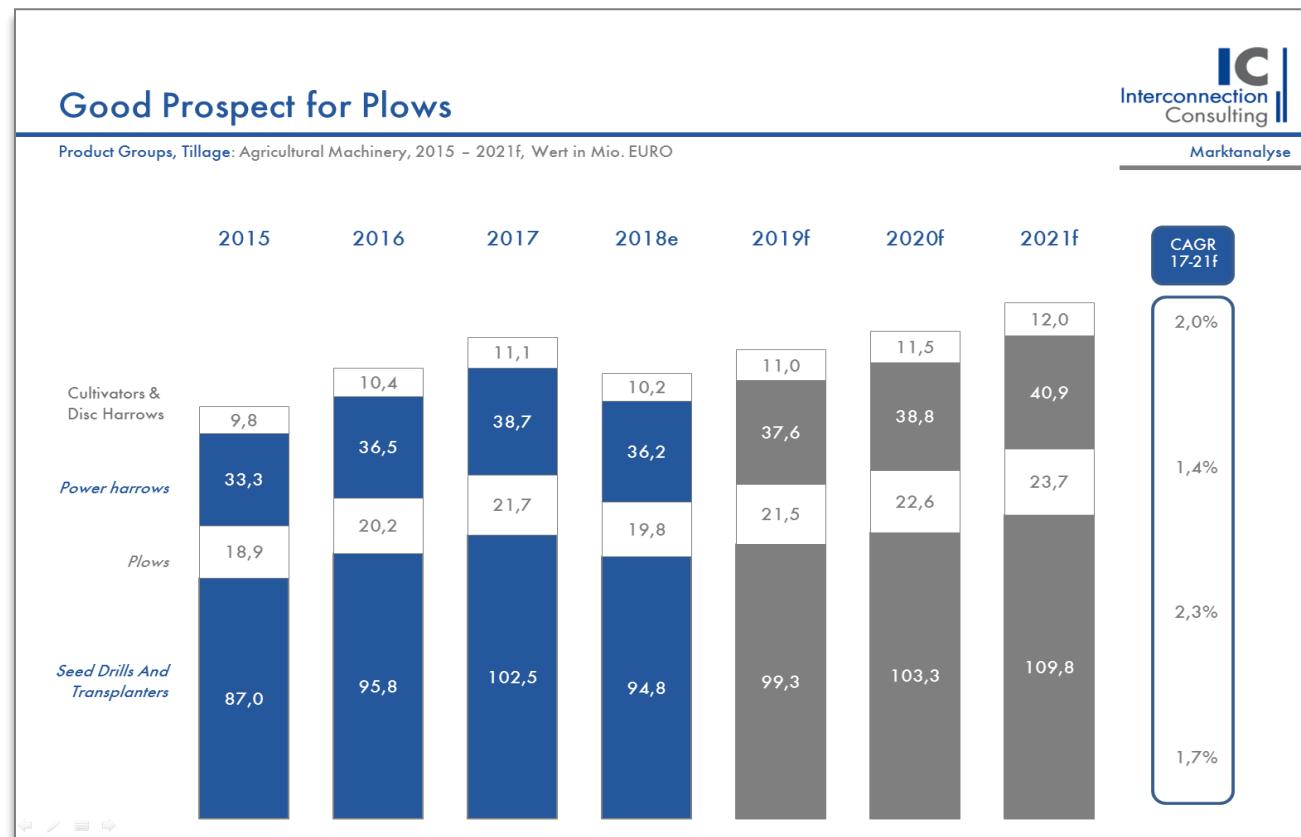
How Is the Market Environment Developing?

- ❑ Overview of the *Development* of relevant micro- and macro economical *market influencing factors*.
- ❑ This Sample Chart shows fictive figures.

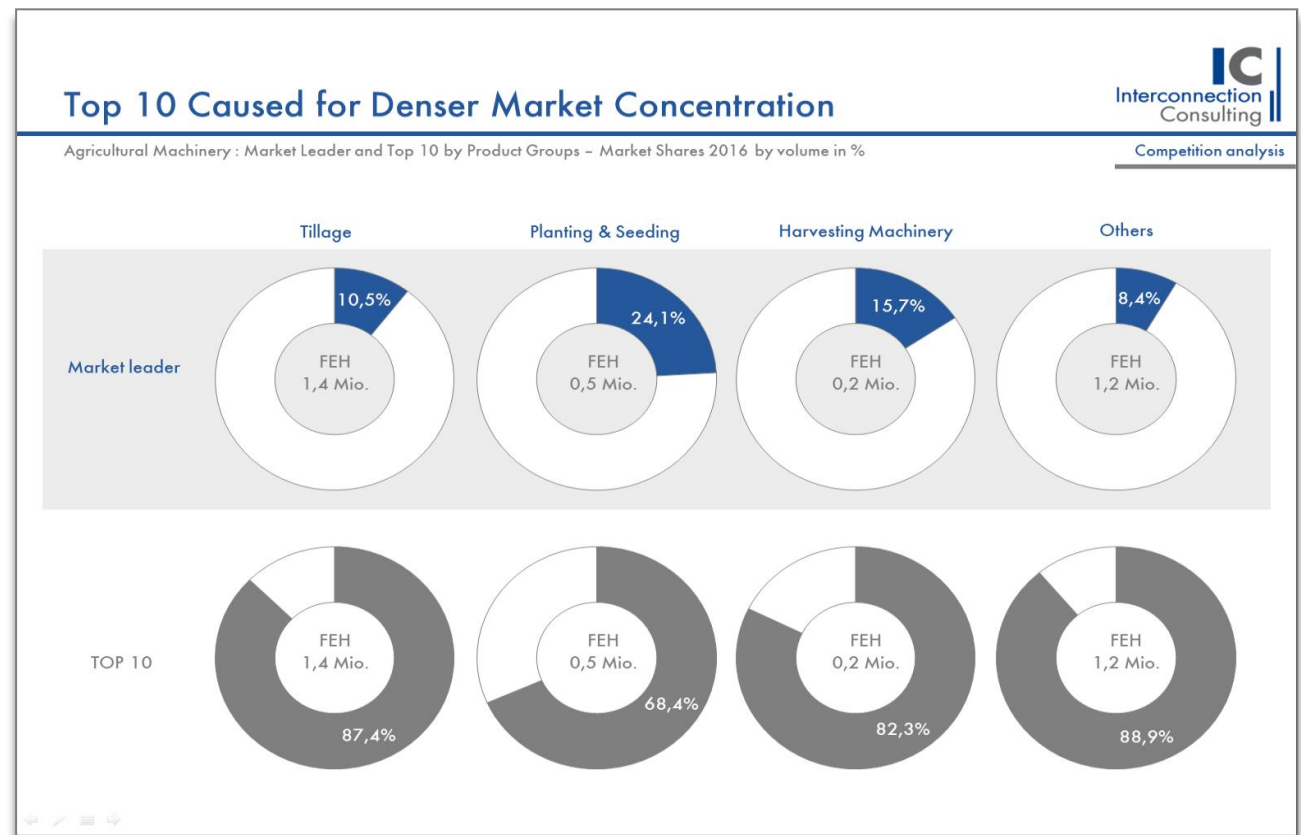


Size and Market Shares of Different Segment

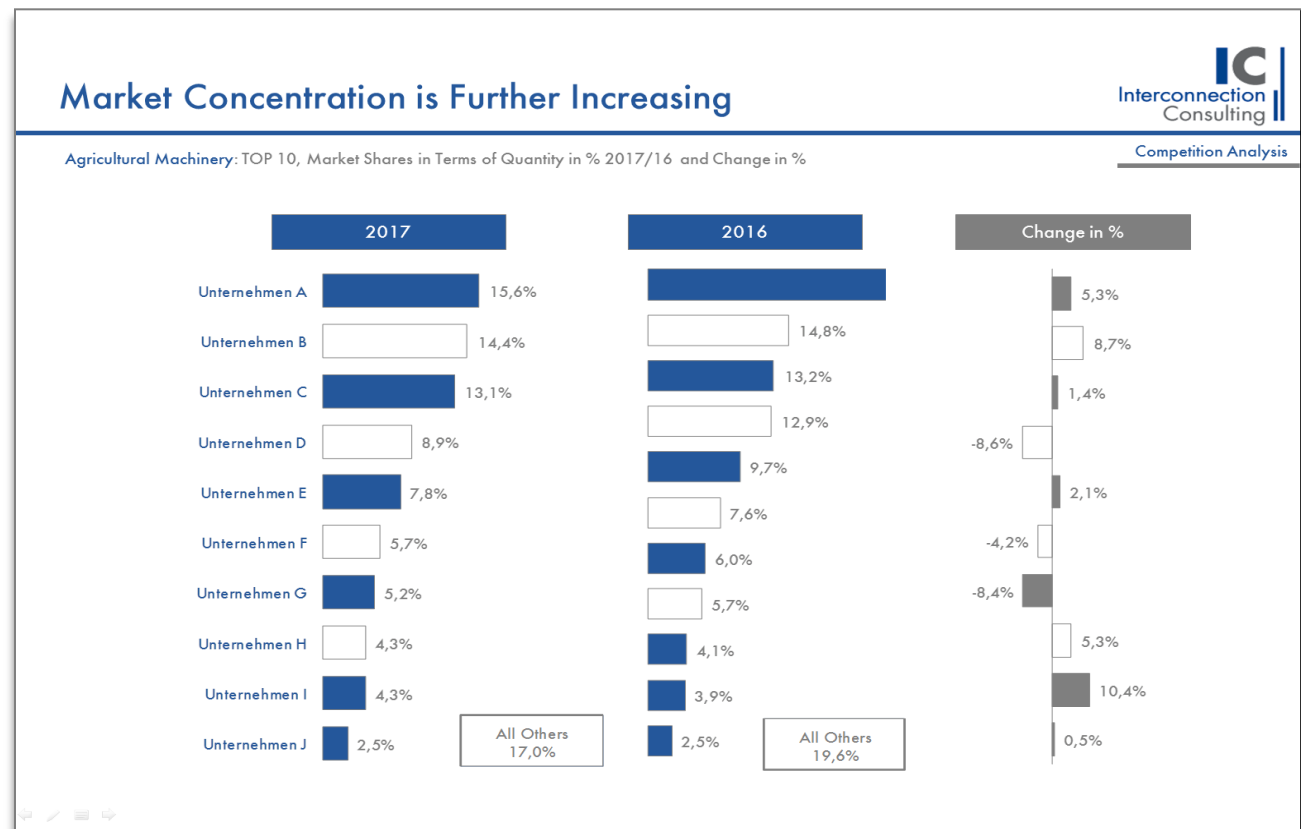
- ❑ *Presentation of different **Segments** and their **Market Shares***
- ❑ *Forecasts for the next three years*
- ❑ *This Sample Chart shows fictive figures.*



- ❑ Detailed presentation of most important companies regarding market shares, development, etc.
- ❑ This Sample Chart shows fictive figures.



- ❑ Detailed presentation of most important companies regarding market shares, development, etc.
- ❑ This Sample Chart shows fictive figures.



- Additionally to the visualised report a Pivot Table will be included
- This tool allows individual and selective analyses to be made by the user with the available data, especially when it comes to future trend and segmentation modeling.
- Pivot tables are available for the competition analysis as well as for the total market and forecast studies.

How to use Pivot Tables

1. Generally, the desired sub-categories (i.e. Technology - A) can be selected with the ordinary drop down menus.

Technology	A
Distribution	(All)
Quarter	4
Quantity/Value	Quantity
Weight Classes	(All)
Country	Germany
Brand	(All)
Ø Price in € (Classes)	(All)


Sum - #	
Segments	Results
Segment A	18.592
Segment B	8.434
Segment C	5.310
Segment D	3.290
Segment E	1.332
Total	36.958

2. If you want to analyse a different category (i.e. Technology), click on the gray field and drag it down to the table.

Distribution	(All)
Quarter	4
Quantity/Value	Quantity
Weight Classes	(All)
Country	Germany
Brand	(All)
Ø Price in € (Classes)	(All)

Sum - #	Technology		
Segments	A	B	C
Segment A	3.290	5.452	7
Segment B	5.310	8.825	21
Segment C	8.434	10.794	
Segment D	18.592	14.624	13
Segment E	1.332	2.229	6
Total	36.958	42.025	47

Dieses Chart zeigt fiktive Zahlen zur Illustration

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Interconnection Delivers Data for Company Decisions

- Interconnection is the leading institute for market data in the agricultural industry.
- Our studies support the leading companies in defining targets and marketing strategies, including competition monitoring and control of marketing actions.
- Interconnection draws its Know-how from over 100 international market studies per year and a number of Ad-hoc studies in several industries.
- Next to market data we offer for the construction branch Ad-hoc studies in the field of distribution analyses, pricing, market entry strategies, customer satisfaction, image analyses etc.
- Our Consultant supports companies also when it comes to translating data into actions, i.e. the development of marketing strategies.



Our Market-Intelligence Tools

Market Analysis



Market Volume
Market Shares & Entry
Competition Analysis

Distribution Analysis



Channel Map
Distribution Matrix
Margins

Customer Insight



Focus Groups
Buying Motives
Customer Benefits

Market Forecasts



Indicator Models
Life Cycle Models
Econometric Analysis

Brand Analysis



Brand Scorecards
Brand - Triangle
Brand Affinity

Customer Satisfaction



Importance/Satisfaction
Portfolios
Customer Loyalty
Customer Typology

Price Research



Price-Sales-Function
Price-Simulation-Tool
Optimal Pricing

E-Commerce



E Commerce Insights
Search Engine Marketing
Web Channel Analysis

“Long experience and a deep insight of the construction markets constitute the quality of Interconnection studies.”

Mr. Bernd Blümmers

Directeur General, Saint-Gobain Solar Systems, Central Europe, Aachen



If there are any questions please
do not hesitate to contact us!

Interconnection Consulting

Dostojevského rad 11, SK -811 09 Bratislava

Tobias Stickelberger – Market Analyst

Tel: +43 1 375 00 15 18

erdpresser@interconnectionconsulting.com

Andreas Erdpresser – Managing Director

Tel: +421 2 20 748 248

+43 1 375 00 15 10

Fax: +43 1 5854623 -30

erdpresser@interconnectionconsulting.com

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Content:

Structure of Study

Language of the report

English

Introduction, market structure & executive summary

Definition and demarcation of product groups, regions and methodology; summary of study results

Market drivers

Key economic factors influencing the market: consumer behavior, main economic indicators etc. Import & export statistics

Total market analysis

Total market development and forecasts for all market segments in quantity and value by regions, product groups, business segments, customer segments, distribution channels and opening types.

Competitive analysis

Market development by value for each region and segment. Market shares of the top manufacturers for each region.

Market Structure

Available countries:

Germany, Austria, France, Italy, Spain, Great Britain, Poland, Netherlands, Ukraine

Product segmentation:

Tillage: 4 product subgroups (ploughs, cultivators & disc harrows, power harrows, seeders & transplanters)

Grassland: 4 subgroups (Tedders/hay rakes/windrowers, loader wagons, balers)

Other: 4 subgroups (combine harvesters, forage harvesters, slurry tankers, manure spreaders)

Distribution channels

Direct, indirect

Methodology

Methodology and data sources

The market and competitive analysis is conducted through interviewing the most important manufacturers in the respective industry. All data are cross-checked for plausibility and evaluated by means of additional sources of information.

The market models and forecasts are based on economic indicator models, which are developed individually for each market. The influencing factors are analyzed by means of multivariate regression analysis and updated each year.

The economic indicators and environmental data are a result of secondary research of prestigious statistical institutes and are supplemented by internal market analyses.