



European Panorama of the agricultural, rural and forestry contractors



Edition 2015

**European Panorama
of the agricultural, rural and forestry contractors**

**with the collaboration of
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European Organisation of Agricultural and Rural Contractors

Europäischer Zentralverband der Lohnunternehmer

FOREWORD

The decision-makers frequently provide us with all kinds of rules and regulations on how we organise agriculture, the forests and land. But very few of them are interested in the consequences of policies drafted at Community or national level for those who actually work in the sector.

Similarly, few people realise that, almost throughout Europe, agricultural, rural and forestry contractors are not just another group of people that contribute to agriculture, forestry and economic life in rural areas. They have become indispensable: farmers and forest owners are very often unable to complete the work carried out by contractors, as they are not in a position to invest in the necessary equipment or handle the available technology in the appropriate manner.

For several years, the development of CEETTAR as a representative organisation and recognised partner for the European institutions has gained pace. CEETTAR and ENFE, the European organisation of forestry contractors, decided to merge on 1 January 2015, in order to join forces and share expertise.

By providing services for farmers, landowners and the rural communities, contractors really do help to meet many of society's needs, including the supply of food products and wood as a primary material for use in construction, as well as energy, the paper industry, rural development and maintenance of natural areas. It is therefore time for us to shed some light on contractors and what they do.

This is the aim of the first edition of this European guide. We hope that this guide will gradually become a reference work, which will be updated regularly, so that becomes even richer in terms of content and relevance.

In the meantime, we hope that you will find it informative.



Gérard NAPIAS
President



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Context and characteristics of the sector

In the absence of official statistics, as there are no indicators in the European Farm Structure Survey, this survey of agricultural, rural and forestry contractors is based on estimates. Based on membership figures for CEETTAR member organisations, it would be reasonable to estimate that **150,000 agricultural, rural and/or forestry contractors** exist within the territory of the European Union.

Due to the fact that the sector is dominated by small and medium-sized enterprises, we can also estimate that **600,000 people are directly employed** in the sector (including managing directors and self-employed workers) at Community level.

In addition, the services that they provide for the agricultural/forestry sectors and local authorities cover **a wide variety of professions and operations**. They include all types of agricultural work, such as soil cultivation, fertilisation, harvesting, transport, livestock and agricultural management services. This is in addition to a wide range of maintenance and management services for rural areas, focusing on networks (communication, infrastructure), the environment and public spaces. Forestry contractors provide a wide range of forestry/reforestation, maintenance and farm management services for forest owners, farmers, suppliers and timber companies.

However, it is safe to say that 50% of regular work in the sector is completed by contractors and, for some harvesting activities, this can figure can rise to over 80% or 90! Here are a few examples:

In France, over 65% of farms specialising in arable crops and over 75% of livestock farms make use of contractors, which harvest sugar beet across an area covering over 250,000 ha;

In Germany, agricultural contractors harvest and make silage from approx. 90% of maize. For grain maize alone, this is equivalent to 1.35 millions hectares and 54 million tonnes;

In Ireland, over 80% of 25 million tonnes of grass silage is harvested by agricultural contractors every year;

In Italy, contractors provide soil preparation services on over one million hectares, as well as services for harvest arable crops and vegetables on close to 2.5 million hectares.

In the Netherlands, contractors maintain over 10,500 km of roads and 140,000 km waterways of different sizes.

In the forestry sector, almost 70% of forestry and harvesting work in Europe is completed by contractors...

Within this highly competitive context, agricultural, rural and forestry contractors are continuously embracing the challenge of adopting new technology. This means that, regardless of their line of work, they are highly capital intensive. As they provide services that cannot be completed without the use of cutting-edge equipment, these contractors need an efficient fleet of machinery based on the latest innovations, which can ensure that work is completed to the highest standard. According to an internal study, **the sector invests almost 6 billion Euros per year**. It comes as no surprise that it is often the contractors who enable new technologies to be rapidly introduced in the fields: precision agriculture, Farming 4.0 and sustainable intensive farming are concepts, which have already been put into practice or are currently being introduced.

Similarly, these contractors, due to this innovative dimension, are characterised by their use of a **qualified workforce and skilled**

professionals. In fact, trained and qualified employees who are able to learn new skills are needed if we are to fully embrace technological advances. In several member states, recognised professional training programmes are already in place or are currently being introduced.

It goes without saying that the combination of these two factors makes it necessary for contractors to guarantee the quality of their services. For this reason, **certification**, though

not compulsory in some cases (such as the use of phytosanitary products), is common practice in most of the sector. This is because, despite the constraints and work involved with certification, the sector is aware of its added value. It guarantees that customers receive the level of service that they deserve, by promoting professional standards for contractors. At the same time, it encourages high standards in terms of health and safety, while also reinforcing compliance with environmental regulations.

An asset for the agricultural and forestry sectors

Agricultural, rural and forestry contractors have all that it takes to provide and complete tailor-made services as rapidly as possible for farmers, forest owners and their other customers. Fine-tuned techniques, qualified staff and professional planning of even the most complex work processes **make it possible to achieve results efficiently, while keeping costs under control.**

As a sector, agriculture is particularly subject to increasingly high demands in terms of farm management and marketing. Agricultural, rural and forestry contractors provide cutting-edge techniques at attractive prices. At the same time, they are able to work flexibly, based on contracts, and their customers are provided with the services that they need and when they need them. Moreover, farmers do not have to invest in their own machinery and can avoid certain financial risks, which is even more important for young farmers. They can therefore devote more financial resources to expanding their businesses and spend their precious time managing the latter. **This makes farms more competitive.**

If a contractor cannot make maximum use of the workforce and available technology or the acquisition of new machines would cause costs to rocket, it is often wise, from the work and farm management point of view, to call upon outside specialists, as this approach can improve **the quality of work** in many cases. This is all the more true as, by introducing the latest innovations to the agricultural and forestry

sector, contractors can also provide unique expertise.

Contractors also carry out important work for public authorities (municipalities), so that they can meet safety requirements on the roads, and maintain paths, roads and waterways. The unpredictable weather of the last few years has shown on several occasions that, in severe winter weather conditions, the traffic grinds to a complete halt, if you cannot rely on outside snow clearing or gritting services. Many contractors have specialised in path and waterway maintenance. In addition, these contractors take care of all kinds of green spaces throughout the year. Whether they maintain sports fields, mow grass verges or cut the trees along our roads or apply mulch to vast areas of non-cultivable land, these businesses have the **required expertise when it comes to the necessary planning, experience and techniques.**

In the forestry sector, using contractors also guarantees greater added value in the final product. Round timber is already cut and measured at the start of the process. When the tree is felled, stripped and cut into logs, information on log types and the volume of trees is recorded on the on-board IT system on the harvesters. This up-to-date information on quality and volume can be used to manage logistics and plan processes at the sawmills. This helps to improve the value of the product and limit stock levels.

Current challenges for contractors

Despite being little known or even unknown to the general public and those who make the decisions, for a long time, agricultural, rural and forestry contractors have been vital partners for the agricultural and forestry sectors. This lack of profile seriously hampers recognition of the contribution made by agricultural, rural and forestry contractors and leads to the **unfair competition** that prevails in many European countries. This unfair competition results in a grey area, in which services are provided outside any kind of legal framework by non-contractors, coupled with unequal treatment for equivalent players in terms of access to public funding linked to the CAP.

The **difficulties experienced when driving agricultural and forestry machinery on public roads** are a major problem for contractors who frequently have to travel. The population increasingly complains about the presence of enormous machines and the dangers that they present for local traffic. During the work season, it is important that society is made aware of the use of these machines. Improved skills, driver attitudes and working on communication may alleviate this feeling of being annoyed. In addition, the member states have strict regulations on the speed and size of machines, combined with maximum axle loads, which do not make it easy to drive the vehicles available on the market.

The problem of driving machines is accentuated by the urban sprawl, which is encroaching on rural areas. This peri-urbanisation leads to the fragmentation of land used for agriculture,

which forces contractors to make more journeys with their machines in areas where the population is increasing, so that the presence of these machines becomes a source of conflict for the latter.

Access to funding remains a major concern for all SMEs. This is especially true for agricultural and rural contractors as capital investments are vital for their work. Since the beginning of the crisis, contractors have noticed more stringent requirements in terms of bank guarantees and other expectations. In some countries, the credit crunch was so powerful that the banks stopped providing liquidity facilities and drastically limited loans for a while. Even if things seem to be improving, interest rates can still vary as much as by threefold between the member states.

Yet, although the number of jobs in traditional agriculture is constantly falling, it can be seen that contractors providing technical services in rural areas now represent a new and continuously developing sector, which is creating qualified jobs and training opportunities. In order to keep up with these developments, the **sector must ensure that the profession remains attractive** to qualified employees, as expectations are constantly rising for operators and this calls for talented professionals who can be difficult to find.

Finally, other issues, such as regulations for awarding public contracts, energy taxation, providing transnational services and even profitability are also a major source of concern for contractors.



Key figures and contractor profiles

The national association of agricultural and rural contractors (VLÖ) has 120 members out of a total of approximately 400 full-time contractors. On average, it is estimated that each contractor generates an annual turnover of approximately €450,000.

Their main activities are cereal/corn threshing (50%), grass/corn silage (60%), wood chip production (60%), which is very important in Austria due to the large number of wood heating systems, forestry work using harvesters and cable cranes (70%), sugar beet/potato harvesting (30%), maize/cereal seeding (10%), slurry spreading (30%) and plant protection (10%). Turnover generated by technical agricultural contractors from harvesting services in Austria is estimated at about €100 million. Austria has a very high density of communal machinery, which is organised and managed by machinery cooperatives. Some communal machines are funded by state subsidies, but the actual contractors do not receive any subsidies.

In Austria, there is a strong tendency for farms and forestry businesses to own their own equipment.

The market for external services is increasing slowly with an annual growth rate of 4%. The market volume of Austrian agricultural, rural and forestry contractors is estimated at €180 million.

Most contractors are small businesses with up to 10 employees and specialise in providing services within their regions. Their customers are mainly large farms and forestry businesses, most of which subcontract all their silaging, wood chipping and manure spreading to contractors.

No specific training programmes exist for contractors or their employees in Austria. For four years, business management courses have been available for contractors, together with courses for drivers on how to deal with customers, drive tractors and handle large agricultural machines. In April 2015, the very first specialist course for skilled agricultural workers was offered at a state college in Upper Austria. It focuses on agricultural services provided by contractors and lasts 4 weeks.

Activities of the national representative organisation

In 2014, the association focused on increasing its membership, improving framework conditions for lobbying initiatives, advising technical contractors, defining a professional profile for technical contractors and introducing professional training as part of the public education system.

In 2015, VLÖ set up a new organisation (a new office and approaches) when its partnership with the agricultural machinery cooperatives came to an end. This was an opportunity to develop a more professional and effective structure.

Further information



Name

Vereinigung Lohnunternehmer Österreich, VLÖ

Date established

2010

Brief history

The long time that it took to create an association for the sector is mainly due to two factors. Agricultural machinery and farmer cooperatives are very widespread in the Austrian countryside. At the same time, for various reasons, the legal framework in Austria has not promoted the development of technical, agricultural and rural contractors. (After Germany, Austria is the country with the largest number of agricultural machinery cooperatives).

However, since 2000 and the years that followed, more and more agricultural, rural and forestry contractors have made these services their main activity. In 2010, a framework was

put into place, in the form of a partnership with the agricultural machinery cooperative of Upper Austria. At this time, 120 contractors from all over Austria joined the Vereinigung Lohnunternehmer Österreich (VLÖ).

On 1 January 2015, the partnership between these two organisations came to an end and VLÖ now conducts its activities completely independently.

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Key figures and contractor profiles

The history of agricultural contractors in Belgium goes back a long way. Research has shown that a union of contractors for threshing cereals and steam engine owners already existed in Belgium between 1908-1910. It was only in 1951 that the National Central Agroservice was created.

The number of professional contractors is currently estimated at approx. 1,200.

According to a survey of 125 Flemish and 52 Walloon companies, conducted by the National Central Agroservice in December 2012, contractors are increasingly diversifying their activities. Indeed, it can be seen that the proportion of “agricultural contract” work is significantly decreasing as part of their gross turnover, both in Flanders and Wallonia.

Only 10% of the surveyed companies were exclusively active in the agricultural sector in 2012. Agricultural contractors in Wallonia are therefore in the process of diversifying in the following fields: spraying (15%), farm management (13 %) and manure/slurry spreading (13 %). This top 3 is followed by transport services using agricultural tractors (10%). In Flanders, manure/slurry spreading services occupy first place (17%), followed by equipment maintenance and repairs (14%) and earth-moving (13%).

Most companies work in agriculture but they are diversifying into fields, such as earth-moving and transport, in order to keep their employees busy throughout the year.

According to the National Central Agroservice survey of December 2012, the outlook for 2017 suggests major investments will be required and mainly for tractors. Indeed, by if the different power categories are taken into consideration, 70% of the companies surveyed say they plan to invest in tractors between 50 and over 250 horsepower. This is followed by investments in general equipment (33%) and GPS systems (25%). Brands are still well represented in the agricultural sector and the majority (93%) of the managing directors say that they are loyal to one brand.

The number of employees is unknown, as many contractors are registered with another joint committee (transport, construction, etc.) rather than the organisation of agricultural contractors, which boasts 1,600 full-time and 2,000 part-time employees who work for approx. 400 companies.

Forestry contractors in Belgium represent 419 companies (which provide jobs for 648 employees) and 1914 self-employed workers.

Activities of the national representative organisations

Since 2014, the National Central Landbouwservice has organised online seminars, which answer most questions on excise duties. It has also set up training sessions in Flanders on professional skills for drivers with EC driving licences.

Finally, both the National Central Landbouwservice and UNEBO organise regular study days on various subjects: Common Agricultural Policy and ‘greening’, explaining regulations on excise duties and professional skills training, sustainable management of forests....

Further information



Name

Agro-service / Landbouwservice

Date established

1951

Short history

“Research has shown that a union of contractors for threshing cereals and steam engine owners already existed in Belgium between 1908-1910. This ambitious initiative included the publication of a weekly professional magazine called “La Locomobile”. The organisation started to collapse, due to internal conflicts, and later cease its activities. The national federation of threshing contractors is probably better known. Created in 1929, this federation, with an executive board consisting exclusively of agricultural contractors, rapidly began to represent employers from the sector throughout Belgium. After the war, the

federation was still the obvious partner for social dialogue and price fixing until the late 1950s. However, it was gradually overtaken by Loondorsersverbond, which is one of the 4 pillars of the National Central and forms the basis of the current professional federation.”

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Name

Union Nationale des Entreprises du Bois,
UNEBO / Nationale Unie Houtsector, NUHOS

Date established

2009

Short history

The National Union for Wood Companies represents the forestry, logging and timber sectors in Belgium. It was founded in 2009 by the Belgian Federation of Foresters and Wood Dealers and National Federation of Wood

Traders. In early 2014, the union for forestry contractors of Wallonia joined this structure.

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Key figures and contractor profiles

Part of a federation of 14 regional agricultural contractor associations, the DM&E association now consists of agricultural contractors, as well as contractors from other fields, such as construction, forestry and sewer maintenance.

DM&E has 725 members, including about 500 agricultural contractors out of a total of approx. 700 contractors in Denmark (equivalent to a market share of 75%).

Agricultural contractors complete various tasks on farms, but concentrate mainly on slurry spreading, sowing maize, harvesting grass/silage for fodder, baling and transporting straw, harvesting and more specialist tasks, such as drain maintenance, tree cutting or lime spreading.

Construction contractors work in the fields of earth-moving, drinking/waste water pipes installation and preparation of trenches for laying cables and pipes.

Forestry contractors complete all kinds of forestry work, such as the production of wood chips, pellets, Christmas trees, etc.

Agricultural contractors generate an average turnover of 660,000€ per year/company. The total turnover achieved by members is 350,000,000€. General construction and

agricultural contractors produce an average turnover of 540,000€ per year/company (total figure for agriculture and construction).

Construction contractors produce an average turnover of 420,000€ per year/company. The combined turnover generated by members is 364,000,000€.

Forestry contractors generate an average turnover of 230,000€ per year/company. The total turnover generated by members is 40,000,000€.

The companies have very different profiles and can have from 1 to over 100 employees. However, the average is 4 - 8 employees. Forestry contractors or those responsible for maintaining the sewers are often one-man businesses. The average turnover is approx. 170,000€ per employee.

It can be observed that agricultural contractors make the largest investments (200,000€ per employee, acquisition and maintenance). The construction sector uses machines that are operated for more hours each year, which spreads out the investment. This is also the case for the forestry sector, but the machines are more powerful and expensive. 4300 employees currently work for contractors in this sector.

Activities of the national representative organisation

In 2014, DM&E created a smartphone application for all traffic regulations. In addition, a Digital Quality System has been developed for waste water.

In 2015, the organisation will help some 200 members to migrate from the Microsoft C5

platform (which is no longer supported) to the Microsoft NAV platform. DM&E will also extend the digital quality system to other fields and develop other tools for members, in order to facilitate their activities.

Further information



Name

Danske Maskinstationer og Entreprenører,
DM&E

Date established

1963

Brief history

DM&E started out as an association for 14 regional associations for agricultural contractors. Today, the DM&E association includes agricultural contractors, as well as contractors from other fields, such as construction, forestry and sewer maintenance.

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Key figures and contractor profiles

The national association Koneyrittäjien liitto boasts approx. 2500 member companies, including associate members.

Forestry is its largest sector, with over 1200 members. Their services focus mainly on tree felling, transport and sometimes undergrowth clearance.

Around 1000 members come from the earth-moving sector, which offers a wide range of services, ranging from road construction, drinking and waste water pipe construction, overhead power cable construction, building substrates, snow clearing in winter, transport by tractor, various types of maintenance work, agricultural contracting, etc.

Forest undergrowth clearing and silviculture contractors account for approx. 250-300 members. Around 250 members come from the peat energy sector. As peat energy is generated during the summer, most of these contractors offer other services during the rest of the year. Just under 100 contractor members offer wood chipping services.

The forestry sector employs approx. 4300 people, while the earth-moving sector boasts

between 500-1000 employees. This figure may increase during the summer. Several thousand employees work in the peat production sector during the summer (late May – late July), compared to about 100 in the winter.

According to internal surveys, the average turnover in 2013 varied according to activity: 680,000€ for wood harvesting contractors, 179,000€ for earth-moving contractors, 347,000€ for peat production contractors, 100,000€ for undergrowth clearing contractors and 500,000€ for wood energy production contractors.

Every year, forestry contractors invest approx. 100 million Euros, mainly in new and used machines. This is equivalent to about 15-20% of their annual turnover. These contractors purchase over 200 forwarders, more than 200 harvesters and other equipment – such as trailers, cars and maintenance buildings/tools.

High-level on-board technology enables contractors to further enhance the wood that it is sold on the market.

Activities of the national representative organisation

In 2014, Koneyrittäjien liitto focused its attention on several customer-orientated forums, politicians and public authorities. It also contributed to various working groups, most of which were set up by the Ministry of Agriculture and Silviculture.

In 2015, the main project is called “10 % - movement” and consists of various

development, communication and training initiatives, which aim to increase profitability to over 10 % over the next few years. The process began two years ago and will be continued by the organisation for several years.

Koneyrittäjien liitto will launch another major project, which includes the creation of a new salary grid for forestry contractors.



Name

Koneyrittäjien liitto

Date de creation

1969

Brief history

The union of Finnish contractors was created by contractors, who mainly worked in the forests. Over the years, the contractors have gradually moved into other sectors, such as earth-moving, peat biomass and wood energy.

Parallel to the above development stages, the contractor associations have seen major changes. In the beginning, every type of contractor was represented by an organisation. They have gradually merged and established a strong national representative organisation: the council of the national organisation is nominated by the general meeting and the regional associations have their own councils.

Officially, each one-man business is a member of a regional association. And these 16 associations are members of the national

association. However, almost all services are provided by the national organisation. In addition, all subscriptions are paid directly to the central organisation.

The member contractors are assigned to different categories, depending on the sectors, in which they operate, and the type of services that they provide. But a large number of these contractors work in various sectors, so that the number of members in the different sectors is greater than the number of one-man businesses.

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Key figures and contractor profiles

21,000 agricultural, forestry and rural contractors were working in the heart of the country in 2013, assisted by over 88,000 employees.

The combined turnover generated by all agricultural contractors is around 3,424 million Euros (13,055 contractors). The combined turnover produced by all forestry contractors is approx. 800 million - 1 billion Euros, according to estimates (8,929 contractors).

Out of the 21,000 contractors in the three sectors, 10,000 are one-man businesses: 5,716 are agricultural contractors, 360 are silviculture contractors and 3,927 are forestry contractors.

Contractors with 5-50 workers employ almost half the people that work in agriculture. Contractors with less than 1-5 or over 50 workers employ the other half. The lowest concentration can still be seen in the forestry sector. Contractors with less than 1-5 employees account for two thirds of employees. For silviculture contractors, the number of

employees is divided into thirds according to the different types of employer.

The sector employs 88,376 workers, including 30,334 full-time equivalent employees. 22,187 work in agriculture, 6,326 in forestry and 2,959 in silviculture. Out of the 104,488 contracts registered in 2013, 88,162 were for agricultural services, 13,367 for forestry work and 2959 for silviculture services.

Two key facts underline the dynamic nature of the profession: 49% of all employees are under thirty years of age and the total number rose by 39% between 2003-2013. This increase mainly affects agricultural contractors, for which the number of employees rose from 48,621 in 2003 to 73,920 in 2013.

Seasonal activities remain essential when it comes to coping during peak periods. October, September, July, May, June and January are generally the months, in which the most contracts are signed in the agricultural services sector.

Activities of the national representative organisation

The 83rd congress of the national federation EDT, which took place on 19-20 March 2015, was an opportunity to take stock of what was achieved in 2014: negotiations within the framework of social dialogue, rejection of unfair and distorted competition for contracts awarded by local authorities, work on the Irstea

agricultural equipment mission and signature of the strategic committee of the timber industry.

At the congress, it was pointed out that contractors need to communicate more with each other, as well as research partners and particularly political decision-makers.

Further information



Name

Fédération nationale des Entrepreneurs Des Territoires, FNEDT

Date established

1922

Brief history

Created in 1922, this professional organisation traditionally attracted threshing contractors. The diversification of its activities and addition of other federations, in 2002, gave a new impetus to its work, when it merged with the FNSETF (National Federation of Forestry Contractor Unions).

In 2003, the National Federation of Agricultural, Rural and Forestry Contractors (FNETARF) became the FNEDT, which unites agricultural, forestry and rural contractors.

Land-based contractors are men and women who work as part of a network, which strives to help agricultural, forestry and rural contractors to develop markets.

The federation currently consists of 80 departmental and 20 regional unions, 16 of which have so far been constituted.

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Key figures and contractor profiles

In Germany, there are currently approx. 6,000 professional agricultural, rural and forestry contractors. However, over 40% of them are run by farms as a sideline.

In 2014, the sector generated a total turnover of approximately €3.3 billion. As before, agriculture is the most important customer group, with a share of over 70%. Agricultural, rural and forestry contractors offer all kinds of services “from sowing to harvesting” on arable land and pasture. They also harvest silage/maize and apply commercial fertilisers (slurry, manure) for livestock farms, which represent the largest market shares. Over the last 10 years, providing supplies and waste management for biogas systems used to generate power has now developed into a major source of income, which amounts to €600 million per year.

With an average annual turnover of over one million Euros, German agricultural, rural and forestry contractors have a highly varied profile and can employ up to 100 people.

It is estimated that they invest approx. 800 million Euros per year, so that their customers can benefit from technical advances in the agricultural sector and acquire new market shares.

The agricultural, rural and forestry contractor sector currently employs about 16,000 full-time and 20,000 part-time workers. This means that approximately 20,000 full-time employees (full-time equivalent) work for German agricultural, rural and forestry contractors.

For 10 years, professional training has been available for people employed by contractors. Every year, 230 young people complete professional training as skilled agricultural service technicians, so that they can be employed by agricultural, rural and forestry contractors as qualified workers. In order to take on business management responsibilities, it is possible to complete further training as an “agricultural service engineer”.

Activities of the national representative organisation

A new campaign called “10 points for image and acceptance” aims to improve the image of the profession and how it is perceived by the population.

The 5th edition of the biennial DeLuTa fair was held in early December 2014 in Münster. Some 12,000 contractors and guests made this specialist BLU event a special occasion, which united two thirds of its members from all over the country. One of the factors behind the success of DeLuTa is its international

dimension. It was also attended by contractors from the Netherlands, England, Denmark, Luxembourg, Switzerland, Austria, Poland and Italy.

Agritechnica 2015, which will be held in Hannover, will be an opportunity for the BLU to promote its members and activities, as well as its new “Young BLU” organisation (“Young people of the BLU”), which unites young farm managers and represents the future of the association.

Further information



BLU Bundesverband
Lohnunternehmen e.V.

Name

Bundesverband Lohnunternehmen e.V., BLU

Date established

1988

Brief history

The BLU (Bundesverband Lohnunternehmen e.V.) was formed in 1988 as an independent umbrella organisation for national associations and specialist groups based all over Germany. These regional organisations still have their own offices, which used to manage the federations and regional working groups, while overseeing and advising affiliated rural contractors. The BLU office now supports approximately 75% of agricultural, rural and forestry contractors in the Federal Republic.

The BLU developed from the federal working group of agricultural, rural and forestry contractors, which was supervised by an employee of the German Farmers' Association (DBV) in Bonn until the late 1980s.

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Key figures and contractor profiles

There are a total of 1,800 agricultural and rural contractors in Ireland.

Most contractors in Ireland are family businesses, which operate as either limited companies or sole traders.

On average, each contractor employs four full-time and twelve part-time workers.

There is everything to suggest that over 6000 workers are employed on a permanent basis.

Most seasonal work takes place during the grass silage season.

The average turnover for an Irish contractor is 300,000€, while the total estimated turnover for the sector is 540 million Euros.

150 million Euros are invested in tractors and machines every year.

The national contractor association has set up a training programme for crop treatment operators.

Thanks to the contractors, services are more profitable and farmers have fewer costs. In addition, the use of up-to-date and expensive machinery is more efficient.

Activities of the national representative organisation

In 2014, the association became highly involved in the preparatory phase of the national rural development programme. In addition, it alerted the government and Dáil Éireann (the Irish parliament) to the difficulties surrounding the treatment of contractors and the negative impact of illicit work on the sector.

In 2015, a national meeting was held at the same time as the national agricultural machinery fair in February 2015, regional meetings and meetings with the authorities (recognition/aid, etc.).

Further information



Association of Farm Contractors in Ireland

Name

Association of Farm Contractors of Ireland, FCI

Date established

2012

Brief history

The FCI was established two years ago. At first, the association was concerned with more immediate problems (repossession of machines by the banks, illicit labour, etc.). Many of these issues were intrinsically linked to tax differences for farmers and agricultural contractors. This was the starting point for the FCI, which is the only democratic organisation that represents agricultural contractors in Ireland.

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Key figures and contractor profiles

In Italy, there are 11,600 contractors, of which 7,000 are professionals. 69% of contractors also have farms. 3,700 of them are members of the national association UNIMA.

The main activities of these contractors are ploughing (approx. 900,000 ha), seeding (600,000 ha), fertilisation (200,000 ha) and harvesting (approx. 2,400,000 ha). Harvesting covers a wide range of products – obviously, major crops, such as wheat, maize, barley and soya are well represented. But it also reflects the diverse nature of agriculture in Italy, as a large proportion of contractors work for the wine industry, while assisting with the cultivation of vegetables, such as tomatoes, and forage. Some of them also provide all services for the same farm (800,000 ha).

28% of contractors generate a turnover of less than €50 000, 27% between €50,000-100,000 and 28% between €100,000-300,000, 12% between €300,000-600 000 and 6% over €600,000.

On average, contractors have 1-2 partners. This is equivalent to 534,000 customers for a

total area of 5.5 million hectares: 45 % have less than 9.9 ha, 16% between 10-19.9 ha, 18% between 20-49.9 ha and 21% have over 50 ha.

Contractors have an average of 2-3 employees, which is equivalent to 17,500 workers (10,500 full-time equivalent), of which 21% have permanent and 79% temporary jobs

The equipment fleet has also been surveyed and amounts to 41,000 tractors, over 15,000 combine harvesters and approx. 100,000 other machines.

The importance of this sector is implicitly recognised, as it is regulated by a collective agreement, which applies to all workers within the sector. The same can be said of various agreements with the public sector and industry, in addition to continuous updates to general regulations, with particular reference to the world of agricultural machinery. Finally, exclusive agreements with public bodies that are linked to this sector continue to apply, which ensure that it is “visible” and underline its economic importance.

Activities of the national representative organisation

In 2014, UNIMA organised a wide-ranging survey of contractors in Italy, in order to gain an accurate picture of the sector and emphasise their importance for Italian agriculture. The organisation has also participated in a variety of events, including two international fairs: FIERAGRICOLA Verona and EIMA INTERNATIONAL Bologna.

Many different activities are planned for 2015. First of all, UNIMA will officially launch and develop UNIMA Jeunes, which is the association for contractors aged under 40.

In addition, agreements are being negotiated with the main manufacturers, in order to secure tangible advantages for the industry;

Moreover, UNIMA will continue the partnership forged in 2014 with the main agricultural organisations, in order to plan joint initiatives and develop appropriate synergies;

Finally, as usual, the organisation will be present at EXPO in Agrilevante and organise another edition of the Contractors’ Day in December.

Further information



Name

Unione Nazionale Imprese di Meccanizzazione Agricola, UNIMA

Date established

1946

Brief history

The “National Union of Agricultural Mechanisation Companies” was founded in 1946 with the aim of protecting of the interests of agricultural engineers, who pioneered the introduction of agricultural machinery. After more than half a century, only the men and methods have changed, but this aim remains the same.

Just two years after it was formed, UNIMA founded Confindustria, the General Confederation of Italian Industry.

Since its inception in 1946, UNIMA has achieved significant results in various fields: support for business management (accounts and tax), using subsidised fuel (and its long-term maintenance), a collective agreement for workers in the sector and agreements with the public sector and industry, in addition to the continuous updating of general regulations, with

particular reference to the world of agricultural machinery.

Exclusive agreements with public bodies, which are also related to this sector, are still in force. They also ensure that it is "visible" and underline its economic importance.

UNIMA is now the only entity in the trade union that represents contractors within very important organisations, such as Confindustria and ENAMA.

Relationships with government representatives, ministries and trade unions also create synergies in the world of business and especially in the primary sector.

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Key figures and contractor profiles

Luxembourg has five major agricultural contractors: Reiff Troisvierges, Hess Carlo Oberglabach, Beck Oberdonven, Gengler Josy and Altmeisch & van der Kley SCA.

These contractors are well equipped, as they own, for example, over 25 combine harvesters, in addition to tractors, which are the ultimate versatile tool!

Together, these five major contractors provide jobs for approx. 30 full-time employees.

Maize and grass silaging are some of the contractors' main activities and require the use of a silage harvester or self-loader (50/50). What makes the farmers of Luxembourg special is that they are over-equipped due to a state subsidy system. For this reason, only the silage harvester needs to be provided by most contractors, as the farmer himself transports and fills the silos.

If we consider the other activities of these contractors, we must single out the various cereal harvests, straw baling, haymaking and silage. Due to the increased number of biomethanation plants, digestate substrate spreading is currently developing rapidly.

Every contractor has his own regular customers.

An increasing number of contracts are being awarded by municipalities and biomethanation plants and particularly for major work tasks that require specific equipment.

Average customer profile: 40 ha silage, 45 ha harvesting, approx. 40 dairy cows and a field size of 2.5 - 3ha.

Due to Luxembourg being a small country, most agricultural contractors work extensively in the neighbouring countries. Their presence is often frowned upon by contractors in these countries, as the machines used by contractors from Luxembourg have been partly subsidised. In addition, contractors in Luxembourg are allowed to use red diesel, which is less heavily taxed, and this advantage does not exist in Germany or the Netherlands.

However, two factors make the mobility and work of contractors from Luxembourg more difficult, compared to the neighbouring countries: the urban structure of the Grand Duchy and small areas covered by farms. This makes the use of large harvesting machines difficult, especially as the contractors are mostly based in urban areas in the centre/south of the country, where the roads are affected by heavy traffic.

At the same time, the cooperative for the use of agricultural machinery organises workshops, as many farmers have their own silage harvester, harvester or other agricultural equipment. In this way, they attempt to make more profit using their equipment, which they primarily purchase for their own needs.

Further information



Name

LU Altmeisch-Van Der Kley

Brief history

Luxembourg does not really have a specific association for agricultural contractors.

For this reason, this small group of contractors has joined the German federation of contractors.

Details

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Key figures and contractor profiles

It is not known how many contractors exist in Poland. There is a wide range of companies. Some very small organisations operate on a limited scale and with a restricted number of customers. They exist alongside a small number of highly specialised contractors that offer all kinds of services over a larger area, which sometimes extends across Poland's borders.

Main activities: sowing, fertilisation, harvesting, mowing, spraying, liming, transport, crops, seed crushing, silage, slurry spreading and legal advice.

It is estimated that agricultural contractors in Poland complete 80% of sugar beet harvesting,

but are only involved in 10-15 % of cereal harvesting.

Founded in Myślęcinek, the PZPUR association has been a CEETTAR member since 15 April 2005. It provides agricultural services for farmers. Its members actively participate in international meetings and take an interest in themes linked to European agriculture.

Out of the association's 40 members, twenty are active. It is headed by 4-5 major contractors who also act as agents for Europe's leading agricultural machinery brands. PZPUR has a sugar beet section, which unites about 12 contractors who work on these crops.

Activities of the national representative organisation

In 2014, the organisation participated in training courses organised by the Deule Institute (DEULA-NIENBURG GmbH) and conducted studies on opportunities for agricultural contractors to benefit from European aid. On 2 October, the PZPUR association took part in the Beet Europe 2014 fair, which was held in

the district of Dobieszów in the south-east of the country.

In 2015, the PZPUR organisation will participate in training courses organised by the Deule Institute (DEULA-NIENBURG GmbH) and work on certification for providers of agricultural services.

Further information



POLSKI ZWIĄZEK PRACODAWCÓW
USŁUGODAWCÓW ROLNYCH

Name

Polski Związek Pracodawców-Usługodawców Rolnych, PZPUR

Date established

2004

Brief history

Formed in Myślęcinek, the PZPUR association has been a CEETTAR member since 15 April 2005. It provides agricultural services for farmers. Its members actively participate in

international meetings and take an interest in themes linked to European agriculture.

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Key figures and contractor profiles

contractors are family businesses, which means that the owners are generally family members and work for the company. Customer profiles are varied and depend greatly on the type of company. Their customers are mostly forest owners, but may also be other companies or industries.

There are no official statistics, but the turnover generated by contractors is between 100,000 - 35 million Euros. The Portuguese organisation ANEFA has 86 members. ANEFA represents the interests of a large number of contractors in a variety of fields: technical services, plant cultivation, forestry, agricultural land and even the processing and marketing of agricultural products.

The nature and intensity of investments vary according to the type of company. Over the last few years, most investments were made in harvesting machines, due to the low level of activity on plantations and forest maintenance,

as well as subsidies for harvesting machines, which have helped companies to upgrade their machinery fleets.

In general, companies have less than 10 employees, but some of them have more, depending on their line of business. For example, the number of employees is greater for companies working on plantations and lower for companies providing technical services.

Companies usually have permanent structures of different sizes, which generally consist of 3-10 people. The number of permanent jobs depends on the type of work completed by contractors, which also have 5-10 temporary workers. It should also be noted that seasonal employees work in some areas.

Training programmes exist, but are organised privately and provided by the companies. There are also subsidies for training programmes, which are usually organised by ANEFA in partnership with training companies..

Activities of the national representative organisation

During 2014, ANEFA's activities focused on representing and protecting the interests of members and other partners, including forest owners and farmers, organising meetings, information sessions and seminars, publication of the ANEFA journal, disclosure of investment programmes: labour, social and tax legislation, events, national and international invitations to tender, organisation of several training sessions, development of work on forest certification, with active participation in the FSC (forest stewardship council) and PEFC (programme for the endorsement of forest

certification systems), development of the CAOF (committee for the monitoring of forest operations), whose long-term objective is to monitor and update working costs for various types of forestry work, such as reforestation and maintenance.

In 2015, the association plans to continue to develop the above activities, organise Expoflorestal 2015 – which is Portugal's only forestry fair – and organise the annual meeting of EFNA (European Forest Nursery Association).

Further information



Name

Associação Nacional de Empresas Florestais, Agrícolas e do Ambiente, ANEFA

Date established

1989

Brief history

ANEFA represents the interests of a large number of contractors from a variety of fields: technical services, plant cultivation, forestry, agricultural land and even the processing and marketing of agricultural products.

ANEFA, which represents 86 small and medium-sized enterprises, attends various councils, committees, working groups of the Ministry of Agriculture, Ministries of Labour and Social Security and Ministry of the Economy. The association also has very close links with other organisations that are active in the fields of agriculture, forestry, rural development rural and the environment.

The association consists of four sections:

- Plant cultivation (nurseries)
- Technical services
- Contractors
- Felling (cutting and marketing of timber)

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Key figures and contractor profiles

The number of technical service contractors is not known, but is estimated at approximately 60.

Contractors who are part of the national organisation do not own land and provide various services for farmers: tractor repairs, manufacture of livestock farming equipment, agricultural building construction, services for trucks, sale of replacement parts for agricultural machines and new agricultural machines, services for combine harvesters, etc.

The turnover generated by contractors amounts to approx. 7 million Euros.

As they do not own agricultural land, the members cannot benefit from any EU subsidies and investments in machinery are therefore very low.

Approx. 120 people are full-time employees.

About 20% of contracts are permanent and the remaining employees have temporary contracts.

Training focuses exclusively on professional diagnostics and repairs, but no training is available, in the traditional sense, for agricultural workers, such as tractor drivers or agricultural machinery technicians.

In addition to quality of service and the professionalism of their employees, contractors enable farmers to make maximum use of combine harvesters. They also guarantee that European investments are profitable.

The legal and tax system for contractors does not enable them to develop properly or sustainably.

Activities of the national representative organisation

In 2014, ZZTSPL strove to recruit new members. The association signed a tripartite agreement between the Ministry of Agriculture and agricultural trade unions.

The main objective of the organisation for 2015 is to recruit new members.

Further information



Nom

Združenie zamestnávateľov technických služieb v poľnohospodárstve a lesníctve, ZZTSPL Slovakia

Date established

2008

Brief history:

The association was founded, under the coordination of CEETTAR, by a group of Slovakian technical contractors, which were formerly known as STS. As a legacy of the communist period in Slovakia, STS was the name generally given to machine and tractor stations that provided technical services and were present in every district of the country. After the Velvet Revolution in Slovakia, these contractors were privatised and some of them went bankrupt. The first step towards forming the ZZTSPL association was made by Eddy Klöcker, former director of CEETTAR, and

Pavel Števík, director of STS Nitra. These two men decided to form the association of technical service contractors in Slovakia, which later became ZZTSPL Slovakia. The latter had seven members and was accepted as a CEETTAR member. In order to better understand the Slovakian context, we should explain that technical services provided for agriculture disappeared after the economy was privatised and there were traditionally very strong independent agricultural cooperatives with their own machinery fleets and tractors. As a result, the market for technical agricultural services is weak in Slovakia.

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Key figures and contractor profiles

The only official statistic concerning the agricultural contractor sector dates back to 2006. The number of agricultural contractors is estimated at 3,400 at national level, with a fleet of over 2,300 machines.

Their activities cover virtually all types of agricultural work: precision seeding, fertilisation, soil levelling work using scrapers or lasers, harvesting cereals, rice, maize, cotton and olives. These contractors provide services for all types of farmer – from the smallest to the biggest – and constantly travel from one region to another. All kinds of contractor can be found in the sector, including large businesses with about fifty vehicles, workshops and permanent employees.

In terms of jobs, it is estimated that each machine requires one permanent employee. This is in addition to another three employees during peak periods. This makes it possible to estimate, in the absence of statistics, that there are at least 15,000 workers in this sector. Most contracts are temporary, although the contractors are continuously expanding and diversifying their machinery fleets and services. This promotes the creation of permanent jobs and employee training.

Customer profiles have also changed. Alongside medium-sized farms, which were already using service providers, large farms can now also be found. The latter make use of

external services due to the lack of a qualified workforce and the financial burden of investments in equipment.

In the forestry sector, 40 contractors have joined the Spanish national association of forestry contractors. Their activities include reforestation, silviculture treatments, preventing and putting out forest fires, managing forest biomass and natural spaces, environmental training, hydrological restoration, development of degraded areas, green spaces and landscapes.

In small businesses, the managing director is legally and technically responsible. He is primarily trained as a forest management engineer. Larger businesses generally have a forestry department, led by a manager who usually has forestry training.

Public authorities represent 90% of the contractors' customers. Only 10% of customers are private individuals. The annual amount invoiced ranges from €300,000 to over 10 million Euros for the biggest companies.

The Spanish forestry sector employs 189,875 workers who work for forest owners, forestry contractors, and the wood/paper industry – in other words, the entire value chain in the forestry sector. The majority of jobs with forestry contractors are temporary, with the number of available jobs reaching a peak during the summer campaigns against forest fires.

Activities of the national representative organisations

Within the framework of agricultural services, the organisation plans to organise its activities in 2015, by focusing on a wide range of themes (insurance, training, access and management of subsidies, tax exemptions for fuels, road traffic regulations, etc.).

In the forestry sector, major attention will be paid to the 9th study looking at investment and employment in the forestry sector, together with rural development programmes for 2014-2020.

Further information



Name

Asociación nacional de Empresas de Servicios agrícolas y Empresarios de Maquinas cosechadoras, AMACO-ANESA

Date established

1982

Brief history

AMACO-ANESA was founded in 1982 as an association for contractors that owned harvesting machines, which was the only service provided by these companies at the time. In 2003, the statutes and the name of the association changed, when it broadened its services to include all types of services and agricultural machinery.

AMACO-ANESA is the only national entity that represents this sector, which provides services for customers in Spain, using agricultural

machinery, and is recognised by the Ministry of Agriculture. The association currently has 250 members at national level, who have different legal statutes, ranging from limited companies to cooperatives, without omitting the many independent companies, which offer agricultural services without being farmers.

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Name

Asociación Nacional de Empresas Forestales, ASEMFO

Date established

1994

Brief history

ASEMFO is a national non-profit organisation for private forestry companies. It was founded in 1994, in order to represent and protect the interests of the private forestry sector and coordinate relationships between members and public service organisations.

The association represents 85% of private forestry companies and contractors in Spain. These contractors aim to protect, preserve and

improve the natural environment. They work throughout Spain.

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Key figures and contractor profiles

There are approximately 200 agricultural contractors in Sweden.

Sugar beet production is the main source of work for contractors in the south of Sweden and covers approx. 20,000 ha out of a total of 32,000 ha that are planted with crops (1.3 billion tonnes).

Information concerning activities in the rest of Sweden is very fragmentary. However, all contractors provide general agricultural services for farms, road construction, etc.

Each company has of 3-4 employees and a team leader, all of whom are well trained by the company.

40% of employees have long-term verbal contracts, while the remaining 60% have contemporary contracts.

Thanks to contractors, customers have the opportunity to use the latest techniques while spending less. They are able to use high capacity machines, if required. In addition, contractors solve the problem of the lack of a qualified workforce.

Currently, the main issues for Swedish contractors are employee training, stability of the rural development programme, questions surrounding insurance, investment needs (capital needs) and the possibility of including all costs in invoices sent to customers.

In the forestry sector, the representative association has a total of approx. 1500 contractors.

While contractors operate on a small-scale with an average of four employees, the customers are larger and include multinational companies, such as SCA, Holmen, StoraEnso and others.

The average turnover generated by forestry contractors is 5.6 MSEK

Examples of investments for forestry contractors: harvesters - approx. 6 MSEK, forwarders - approx. 4 MSEK.

On average, contractors have four employees, with one to drive the harvester and the other to operate the forwarder (2-man team).

Overall, the sector employs about 6000 people full time.

The main issues currently facing Swedish contractors concern how to improve the administrative skills of contractors, in order to produce a reasonable profit, improve the skills of contractors and customers in terms of drafting contracts (for example, in legal terms and the formal wording of contracts, etc.), create a general image for the forestry sector and understand how the harmonised PEFC standards work for contractors.

Activities of the national representative organisations

In 2014, the main task for the association was to increase its membership.

The association plans to increase its membership numbers, raise public awareness

of the importance of the industry, lead monitoring and lobbying initiatives aimed at salary policy issues and improve training in the rural industry.

Further information



Name

Landsföreningen Sveriges Maskinstationer, LSM

Date established

2003

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Name

Skogsentreprenörerna, SMF

Brief history

SMF began as an association for forestry contractors and was initially intended to negotiate prices, etc. as a cooperative.

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Key figures and contractor profiles

Out of a total of approx. 3,000 contractors (which provide agricultural/rural, landscape maintenance, public works, infrastructure construction and civil services), 1,943 are members of CUMELA Nederland.

Contractors in the Netherlands are either specialised or work in several areas, such as agricultural or forestry services, landscape maintenance, slurry spreading, road construction and public works, equipment hire and temporary workers.

90% of Dutch contractors are based in rural areas, where they are the main employer.

Dutch contractors are responsible for 90% of sugar beet harvesting and over 70% of maize harvesting.

The average turnover for contractors was 1,376,000€ in 2013. It can be divided into 801,000€ for construction work, landscape maintenance, road construction and forestry work, 364,000€ for agricultural services and 92,000€ for slurry spreading, with the remainder coming from various other activities.

Customers of CUMELA contractors include: farmers (agricultural work, slurry spreading), local authorities (landscape maintenance, road

construction, infrastructures, services, road sweeping), regional authorities (road construction, waterways and rivers, forests), government (motorways, canals, major civil projects) and the Wood Council (forests).

A few key figures shed light on the activities of CUMELA contractors. Over 22 million tonnes of slurry are transported each year. The association is responsible for maintaining over 10,500 km of roads, over 11,000 ha of sports fields/playgrounds and more than 140,000 km of streams, canals, rivers and riverbanks. Finally, it completes over 70% of public works.

Investments in machinery have remained stable at around 650,000-700,000€ per year over the last five years.

Dutch contractors own 15,000 tractors, over 5,000 harvesters and 18,000 machines used for construction work (excavators, wheel loaders, articulated 6x6 dump trucks, bulldozers).

The 3,000 contractors employ over 30,000 people, mainly as drivers, machine drivers, mechanics, bookkeepers and managers. On average, contractors have 10-12 employees and CUMELA provides contractors with several training programmes.

Activities of the national representative organisation

2014: Tractor bumper project (4 different bumpers were tested as part of a programme involving eight companies), "Safety for Agricultural Vehicles" campaign, launch of "IJzersterk naar morgen" (Strong as Iron Tomorrow) campaign aimed at pooling resources and bringing our key projects under a single slogan. The aim is to organise and

rationalise our regional activities and develop a strong image for the sector and profession.

Projects for 2015: Regional representation of members in regional and local government, sector plan project (providing over 100 posts for a public that is reluctant to become involved), developing an image for the sector.

Further information



Name

CUMELA Nederland

Date established

1936

Brief history

CUMELA Nederland was founded in 1936 as a lobbying organisation for agricultural contractors. At this time, harvesting and threshing, together with the application of pesticides, were the main activities for contractors. In the 1960s and 1970s, Dutch contractors modernised their sector, by adding earth-moving services. 70% of earth-moving in the Netherlands is now completed by the sector (CUMELA).

Over the last three decades (since the 1980s), the organisation has developed a more balanced programme of activities, in order to support its members, with activities at macro and micro level.

Approx. 50 people now work for CUMELA, where they support and provide services for over 1920 members.

Nowadays, key issues for CUMELA include: a competitive and stable labour market (social security, training), effective legislation for mobile equipment, safety, sustainability, environmental issues and current concerns for the agricultural and rural sectors, which are directly or indirectly linked to contractors.

Details

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Key figures and contractor profiles

Out of the total membership of British association NAAC (National Association of Agricultural Contractors), which was founded in 1893, 63% members provide agricultural services, such as field work and crop spraying, 9% are mobile seed processors and 12% are green space contractors, while 6% have a mobile feed mill or mixer and 10% contractors provide livestock services, such as sheep shearing.

Small contractors with 1-3 employees typically generate a turnover of about £25,000-£100,000.

Medium-sized companies produce a turnover of £100,000 - £250,000, while the largest contractors make a turnover of £250,000 - £1 million and above.

It is estimated that there are approx. 6,000 professional contractors in the United Kingdom.

Based on internal estimates, there are approx. 15,000 people working in the sector.

There are a certain number of training programmes. Information can be found at: <http://www.nptc.org.uk/>

Activities of the national representative organisation

In 2014, the organisation's activities focused on various lobbying activities, such as increasing the maximum authorised weight and speed for tractors (with and without trailers), training courses for members on the cost of materials and development of a spreading module for the "Assured Land-based Contractor Scheme".

The activity programme for 2015 including making a special effort to increase member numbers, by providing them with a new package of services and benefits, organising

the flagship "Contractor 2015" event in December, continuing to develop the Assured Land-Based Contractor (ALBC) Assurance Schemes and conducting members surveys, in order to better define their needs and represent them more effectively. It also involves developing a wide range of advice and guidance, both for contractors and their customers, with the dual aim of ensuring that members benefit and encouraging new members to call upon services provided by contractors from the NAAC association.

Further information



Name

National Association of Agricultural Contractors, NAAC

Date established

1893

Brief history

Established in 1893, as the National Traction Engine Owners and Users Association, it became the Nation Traction Engine and Tractor Association in 1945, before finally adopting the name National Association of Agricultural Contractors (NAAC) in 1956.

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