



DEALER-MANUFACTURER RELATIONS REPORT

2021

EQUIPMENT DEALERS ASSOCIATION

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Table of Contents

Notes on the 2021 Dealer-Manufacturer Relations Survey	4
Ratings by Manufacturer Type	8
Full-Line Manufacturers	9
Tractor Manufacturers	10
Shortline Manufacturers	11
OPE Manufacturers	12
Category Ratings.....	13
Overall Satisfaction	14
Product Availability	15
Product Quality	16
Product Technical Support ..	17
Parts Availability	18
Parts Quality	19
Return Privileges	20
Communications with Management	21
Warranty Procedures	22
Warranty Payments.....	23
Marketing & Advertising Support	24
Manufacturer Response to Dealer Needs/Concerns	25
Ratings by Brand/Manufacturer	26
AGCO	27
Case IH	28
Claas	29
John Deere	30
Kubota.....	31
New Holland.....	32
Branson Tractor	33
JCB	34
Kioti.....	35
LS Tractor.....	36
Mahindra.....	37
McCormick	38
TYM	39
Versatile.....	40
Yanmar	41
Art's Way.....	42
Bobcat (Doosan)	43
Bourgault	44
Bush Hog	45
Degelman.....	46
Elmer's Mfg.....	47



Table of Contents

Gehl.....	48
Great Plains.....	49
H & S Mfg.....	50
Highline Mfg.....	51
Kinze.....	52
Krone NA.....	53
Kuhn NA.....	54
Landoll.....	55
Land Pride.....	56
MacDon.....	57
Meyer Mfg.....	58
RhinoAG.....	59
Unverferth.....	60
Vermeer.....	61
Woods.....	62
Ariens.....	63
Bad Boy.....	64
Big Dog.....	65
Billy Goat.....	66
Briggs & Stratton.....	67
Cub Cadet.....	68
Dixie Chopper.....	69
ECHO.....	70
Exmark.....	71
Ferris.....	72
Grasshopper.....	73
Gravely.....	74
Honda.....	75
Husqvarna.....	76
Hustler.....	77
Kawasaki.....	78
Kohler.....	79
Scag.....	80
Shindaiwa.....	81
Simplicity.....	82
Snapper.....	83
STIHL.....	84
Toro.....	85
Walker.....	86
Wright Mfg.....	87



Notes on the 2021 Dealer-Manufacturer Relations Survey

Equipment Dealers Association

INTRODUCTION

Every year, the Equipment Dealers Association (EDA) conducts its Dealer-Manufacturer Relations Survey. This survey allows equipment dealers an opportunity to rate the companies whose products they represent on 11 key categories of dealership operations and support plus a separate rating for Overall Satisfaction.

This report contains valuable information about the relationship between dealers and their suppliers. Both manufacturers and dealers have found the data beneficial in improving product and service quality and promoting top-ranked products to consumers.

Many manufacturers have used the survey results to promote their performance to their dealer network and end-users. They have also used the results as a means to support change and improvements within their organizations. Dealers have used the results to evaluate potential new product lines for competitive comparisons with brands they currently handle and to communicate areas of strengths and needs for improvement of their represented manufacturers.

While the survey results provide an accurate assessment of dealer attitudes regarding the lines they represent, it is important to note that the ratings represent dealer satisfaction captured in a singular moment in time. The results could change relatively quickly due to a number of external factors or situations.

Manufacturer Classifications - In an effort to recognize the operational differences between manufacturers, they are placed into one of four classifications, defined as follows:

- ***Full-Line Manufacturers*** – Equipment manufacturers who produce, distribute and market a full complement of farm and ranch equipment including combines, harvesting machines, tractors and implements.
- ***Tractor Manufacturers*** – Equipment manufacturers who produce, distribute and market tractors of varying horsepower used primarily in farm and ranch, construction, landscaping, municipal and land owner operations.
- ***Shortline Manufacturers*** – Equipment manufacturers who produce, distribute and market implements used primarily in farm and ranch, construction, landscaping, municipality and land owner operations. These products may include planters, tillage, sprayers, skid steer loaders, post-hole diggers, and small horsepower tractors not affiliated with a Full-Line or Tractor Manufacturer.
- ***OPE Manufacturers*** – Equipment manufacturers who produce, distribute and market outdoor power equipment used in commercial and residential applications for turf, lawn and/or grounds maintenance. These products may include chainsaws, mowers, trimmers, edgers, blowers, sprayers, pruners and similar items not affiliated with a Full-Line, Tractor or Shortline Manufacturer.

Report Contents - This summary report contains response data in both table and graph formats for the following areas:

1. Rating compilations and comparisons for the four manufacturer categories plus an aggregate for all manufacturers.
2. Dealer Ratings for the 11 key categories of operations and support plus a separate Overall Satisfaction rating.
3. Ratings by individual brands (61 manufacturers) for each of the 12 rated categories with comparisons to 2020 and the aggregate means for the respective manufacturing classification.

METHODOLOGY

Dealers were asked to select and rate the manufacturers they represent in each of the 12 categories on a 1-7 rating scale with the following descriptors:

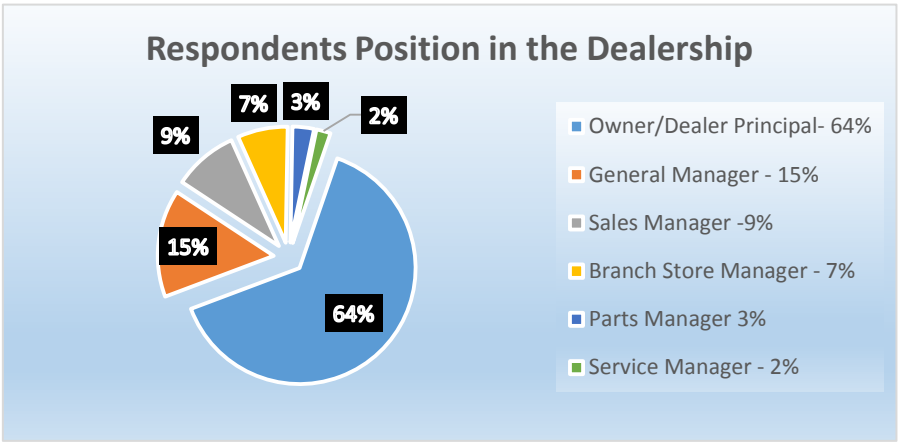
- 1 = extremely dissatisfied
- 2 = dissatisfied
- 3 = somewhat dissatisfied
- 4 = neutral
- 5 = somewhat satisfied
- 6 = satisfied
- 7 = extremely satisfied

Each dealer respondent was able to select and rate up to seven manufacturers. After the initial selection, respondents were prompted to rate each company within the 12 categories.

Survey Distribution - The Dealer-Manufacturer Relations Survey was distributed to dealership contacts on February 4, 2021 and remained active until March 4, 2020. Multiple reminders were sent to all who had not yet completed the survey. Each survey link was unique to the recipient, which prevented the survey from being taken more than once. To assist in distribution, 40 manufacturers provided lists of their U.S. and Canadian dealer networks. Duplicate email addresses were removed via a multi-step process.

Responses - Dealer responses were collected anonymously by a third party research firm. There were 2,553 individual dealer contacts who participated in the survey. Dealer responses were received from 49 U.S. states, 11 Canadian provinces/territories. Each respondent rated an average of four manufacturers.

The chart below shows the distribution of survey respondents by position in the dealership. Eighty-six percent of the respondents were either the dealer principal/owner, general manager or store/branch manager. Fourteen percent of respondents were department managers.



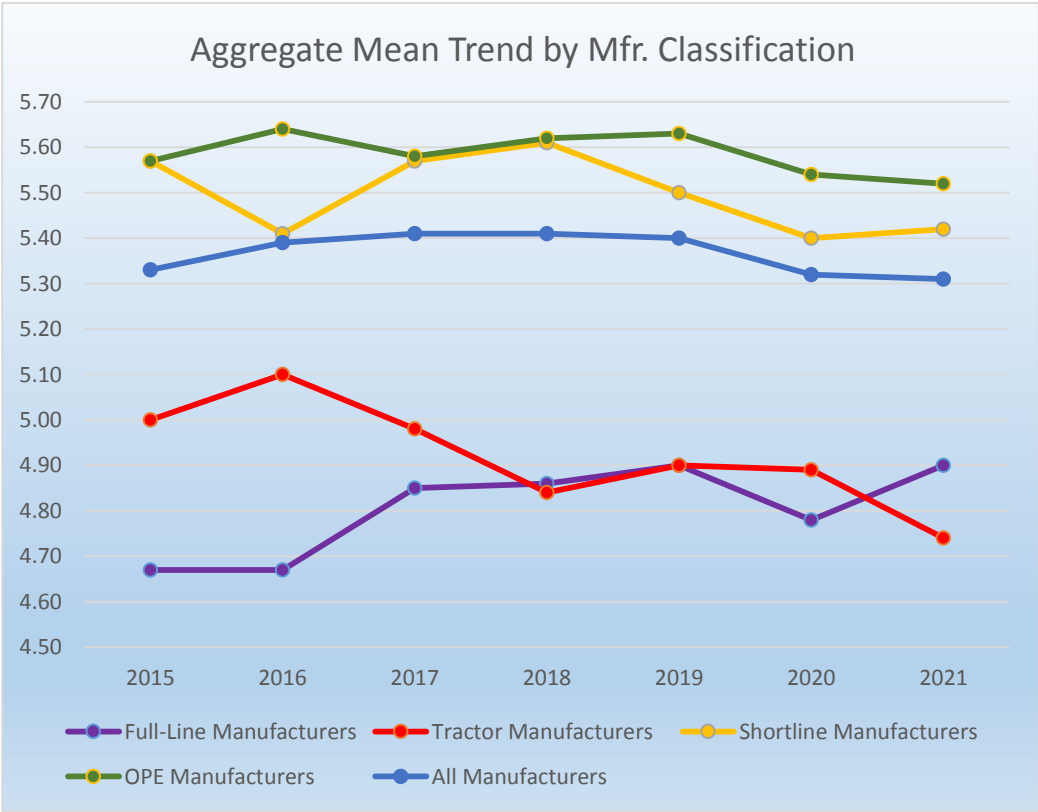
STATISTICS

The 61 manufacturer brands featured in this report received a minimum number of dealer ratings as required to be included in the report. Each company’s mean score for each of the 12 rated categories is measured against the mean for all manufacturers in their classification along with the previous year’s rating.

The rating for Overall Satisfaction is a stand-alone rating and is not compiled from the remaining 11 categories.

Variance and standard deviation data and other statistical data are not reported in this summary, but can be made available upon request for an additional fee.

The chart below shows the trend in aggregate mean ratings for the manufacturer classifications over the past 7 years.



Ranking of Rating Category by Importance – Respondents were asked to rate the importance of each of the 11 rated operational categories as it relates to the overall relationship with a manufacturer. As shown in the table below, most respondents rated each category as Important to Very Important. The mean number represents the degree of importance, and the lower the number, the more important the category.

Rating Category	Very Important	Fairly Important	Important	Slightly Important	Not at all Important
Product Quality	91%	5%	2%	1%	1%
Parts Availability	84%	11%	3%	1%	1%
Parts Quality	79%	15%	4%	1%	1%
Product Availability	79%	14%	6%	1%	1%
Manufacturer Response to Dealer Needs/Concerns	76%	18%	4%	1%	1%
Product Technical Support	74%	19%	5%	1%	1%
Warranty Payments	64%	25%	9%	1%	1%
Warranty Procedures	55%	32%	10%	1%	1%
Communication with Management	55%	30%	11%	2%	1%
Marketing & Advertising Support	42%	35%	18%	4%	1%
Return Privileges	37%	36%	22%	4%	11%

The order of importance of the rating categories has remained consistent from year to year especially among the top six categories. However, in 2021 dealers rated Product Availability of more importance than previous years. This was expected due to disruptions in the supply channel in 2021.

ADDITIONAL DATA

This comprehensive report is made available to all EDA dealer members as a benefit of membership and to all manufacturers featured in the report. The survey questionnaire includes embedded data, which allows for more detailed reporting. As a result, we are able to provide Manufacturer Members of EDA more detailed statistical data from their dealer ratings, respondent breakouts by regions, data comparisons and most importantly anonymous dealer comments as an added benefit of membership. Dealer comments are not included in the general report. For an additional fee, we are also able to conduct confidential follow-up surveys for manufacturers interested in collecting more specific information and analysis. If you would like to join EDA as a Manufacturer Member, contact Joe Dykes at 636.349.6205 or JDykes@EquipmentDealer.org.

RATINGS BY MANUFACTURER TYPE



Equipment Dealers
A S S O C I A T I O N

Full-Line Manufacturers

	RATINGS SCALE: 1 = EXTREMELY DISSATISFIED 7 = EXTREMELY SATISFIED											
	Overall Satisfaction	Product Availability	Product Quality	Product Technical Support	Parts Availability	Parts Quality	Return Privileges	Communications with Management	Warranty Procedures	Warranty Payments	Marketing & Advertising Support	Manufacturer Response to Dealer Needs/Concerns
All Manufacturers	5.54	4.97	5.76	5.42	5.35	5.81	5.13	5.14	5.24	5.27	5.09	5.01
Full-Line Manufacturers	5.14	4.11	5.30	4.85	4.88	5.52	5.05	4.81	4.85	4.99	4.85	4.44
AGCO	5.28	4.41	5.47	5.03	5.21	5.62	5.05	4.83	5.02	5.08	4.47	4.53
Case IH	5.47	4.63	5.19	4.86	4.60	5.25	4.99	5.27	4.84	4.88	5.09	4.96
Claas	5.67	5.16	6.16	5.67	5.62	6.05	5.42	5.15	5.16	5.30	5.07	4.93
John Deere	5.22	3.63	5.63	5.27	5.62	5.97	5.33	4.98	5.36	5.51	5.25	4.53
Kubota	4.45	2.73	4.64	4.30	4.03	5.21	4.81	4.21	4.25	4.51	4.83	3.71
New Holland	4.73	4.09	4.69	3.99	4.19	5.00	4.72	4.44	4.46	4.63	4.37	3.98

Tractor Manufacturers

	RATINGS SCALE: 1 = EXTREMELY DISSATISFIED 7 = EXTREMELY SATISFIED												
	Overall Satisfaction	Product Availability	Product Quality	Product Technical Support	Parts Availability	Parts Quality	Return Privileges	Communications with Management	Warranty Procedures	Marketing & Advertising Support	Manufacturer Response to Dealer Needs/Concerns		
All Manufacturers	5.54	4.97	5.76	5.42	5.35	5.81	5.13	5.14	5.24	5.27	5.09	5.01	
Tractor Manufacturers	5.04	4.16	5.52	4.77	4.45	5.51	4.71	4.45	4.61	4.69	4.76	4.25	
Branson	6.11	5.10	6.34	5.67	5.90	6.36	5.90	5.39	5.61	5.84	6.00	5.31	
JCB	4.77	4.27	5.21	4.56	4.27	5.12	4.44	4.60	4.50	4.40	4.58	4.23	
Kioti	4.93	2.88	5.81	4.72	4.24	5.69	4.58	3.54	4.74	4.90	5.04	3.60	
LS Tractor	5.53	4.51	5.90	5.35	5.05	5.97	5.26	4.80	4.77	4.74	4.91	4.57	
Mahindra	3.61	2.76	4.26	3.38	2.19	4.11	3.47	3.04	3.62	3.76	4.45	2.74	
McCormick	4.36	4.02	4.84	4.36	4.07	5.23	4.36	3.91	4.18	4.14	3.95	3.77	
TYM	5.19	4.24	5.54	4.59	4.11	5.68	4.70	4.54	4.24	4.51	4.41	4.35	
Versatile	5.32	4.95	5.4	4.96	4.95	5.44	4.77	5.40	4.85	4.76	5.09	5.01	
Yanmar	5.54	4.75	6.40	5.36	5.29	5.98	4.88	4.84	4.98	5.16	4.45	4.64	

Shortline Manufacturers

RATINGS SCALE: 1 = EXTREMELY DISSATISFIED 7 = EXTREMELY SATISFIED	Overall Satisfaction	Product Availability	Product Quality	Product Technical Support	Parts Availability	Parts Quality	Return Privileges	Communications with Management	Warranty Procedures	Marketing & Advertising	Support	Manufacturer Response to Dealer Needs/Concerns
	All Manufacturers	5.54	4.97	5.76	5.42	5.35	5.81	5.13	5.14	5.24	5.27	5.09
Shortline Manufacturer	5.67	5.14	5.82	5.51	5.52	5.84	5.20	5.31	5.27	5.26	5.18	5.25
Arts Way	4.11	4.31	4.23	3.88	4.29	4.94	4.24	3.82	4.03	4.06	4.03	3.74
Bobcat	4.85	3.88	5.00	4.74	4.22	5.40	4.79	4.36	4.46	4.59	4.74	4.09
Bourgault	6.35	5.49	6.41	6.22	6.22	6.43	5.76	6.30	5.97	6.03	6.14	6.22
Bush Hog	5.88	4.97	6.02	5.75	5.68	5.95	5.33	5.50	5.54	5.56	5.14	5.41
Degelman	5.76	5.55	6.05	5.64	5.60	5.83	5.26	5.10	5.10	5.07	5.21	5.32
Elmers Mfg	5.90	5.50	6.10	5.60	5.40	5.50	5.00	5.30	5.60	5.40	5.10	5.50
Gehl	4.58	3.79	5.37	4.14	4.76	5.63	4.41	3.80	4.08	4.20	3.97	3.62
Great Plains	5.99	5.38	6.13	5.91	5.84	6.01	5.39	5.69	5.65	5.68	5.71	5.73
H & S Mfg	6.16	5.83	5.94	5.87	6.08	6.14	5.54	5.77	5.59	5.55	5.55	5.84
Highline Mfg	6.14	6.05	6.00	5.77	6.09	6.18	5.68	5.82	5.68	5.59	5.77	5.86
Kinze	5.38	5.13	5.68	5.24	5.22	5.71	4.78	5.05	4.94	4.91	4.85	4.89
Krone	5.75	5.53	5.97	5.21	5.39	5.89	5.14	5.32	4.96	4.93	4.99	5.13
Kuhn NA	5.57	4.92	5.81	5.57	5.46	5.79	5.15	5.39	5.11	5.15	5.19	5.16
Landoll	6.10	5.62	6.10	5.99	5.86	6.04	5.31	5.61	5.56	5.54	5.41	5.72
Land Pride	5.42	3.52	5.76	5.46	5.47	5.77	5.19	5.20	5.26	5.23	5.01	5.02
MacDon	6.00	5.72	6.10	5.90	5.76	5.99	5.41	5.49	5.44	5.43	5.51	5.63
Meyer Mfg	6.03	5.76	6.06	6.06	6.09	6.09	5.41	6.03	5.74	5.50	5.29	5.79
RhinoAG	5.57	4.92	5.75	5.47	5.38	5.65	5.08	5.17	5.26	5.27	5.19	5.21
Unverferth	5.93	5.69	5.97	5.83	5.66	5.79	5.40	5.53	5.53	5.43	5.31	5.53
Vermeer	5.96	5.70	5.99	6.07	5.95	6.22	5.87	5.88	5.85	5.96	5.64	5.69
Woods	5.63	4.63	5.81	5.49	5.48	5.79	5.14	5.39	5.40	5.41	5.10	5.21

OPE Manufacturers

RATINGS SCALE:
1 = EXTREMELY DISSATISFIED
7 = EXTREMELY SATISFIED

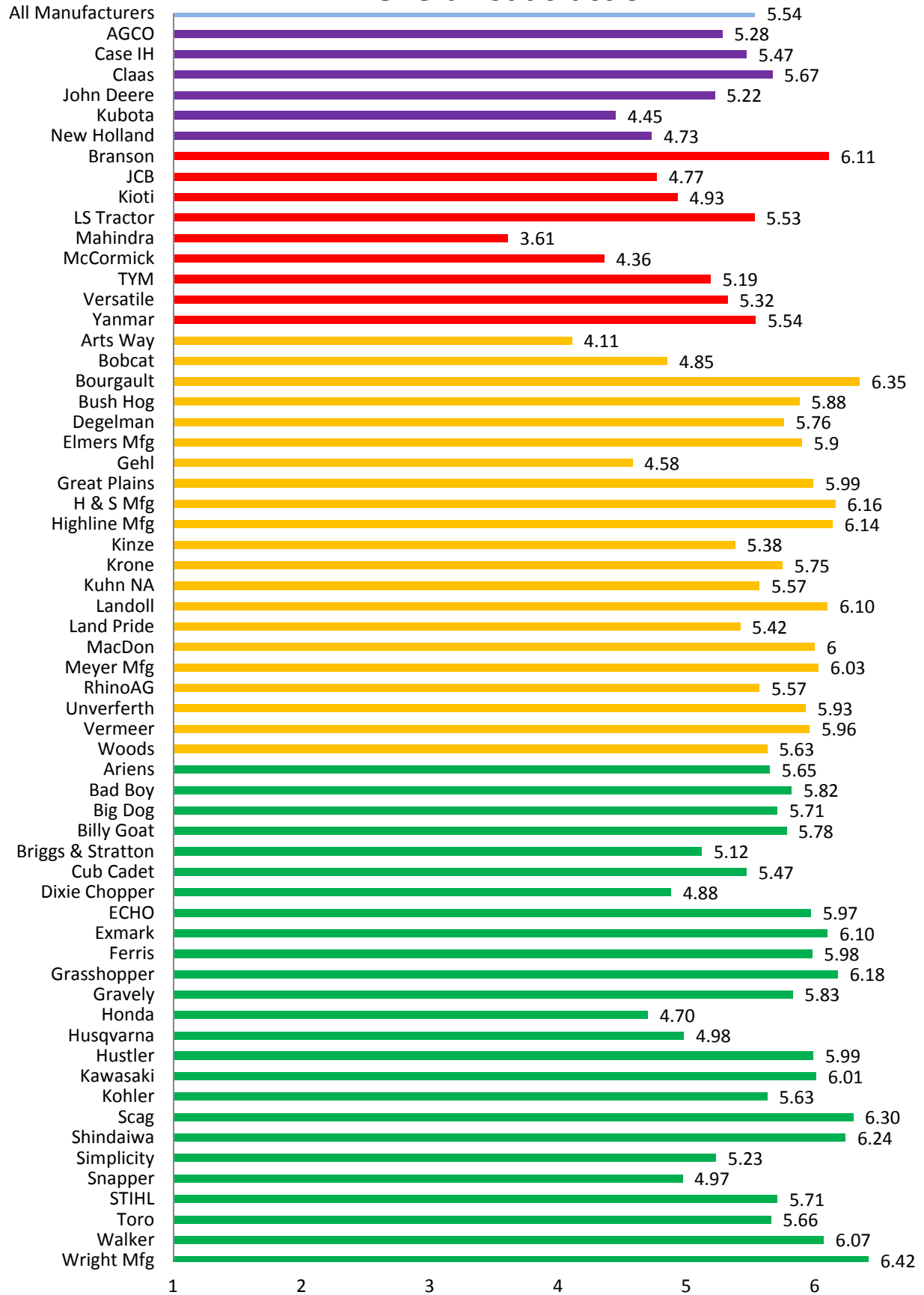
	Overall Satisfaction	Product Availability	Product Quality	Product Technical Support	Parts Availability	Parts Quality	Return Privileges	Communications with Management	Warranty Procedures	Warranty Payments	Marketing & Advertising Support	Manufacturer Response to Dealer Needs/Concerns
All Manufacturers	5.54	4.97	5.76	5.42	5.35	5.81	5.13	5.14	5.24	5.27	5.09	5.01
OPE Manufacturers	5.70	5.32	5.90	5.71	5.64	5.96	5.23	5.31	5.53	5.56	5.19	5.21
Ariens	5.65	5.50	5.87	5.59	5.64	5.94	4.99	5.26	5.53	5.59	5.12	5.07
Bad Boy	5.82	6.20	6.15	5.59	6.16	6.06	5.32	5.23	5.47	5.43	5.45	5.14
Big Dog	5.71	5.78	5.92	5.95	6.00	6.12	5.59	5.68	5.73	5.88	5.34	5.44
Billy Goat	5.78	5.66	5.81	5.36	5.68	5.76	5.04	5.03	4.91	4.93	4.69	5.07
Briggs & Stratton	5.12	4.88	5.27	5.32	4.90	5.40	4.68	4.79	5.13	5.28	4.46	4.61
Cub Cadet	5.47	4.83	5.36	5.10	4.92	5.40	4.76	5.05	4.76	4.86	5.24	4.81
Dixie Chopper	4.88	4.63	5.69	5.13	5.19	5.88	5.47	5.20	5.13	5.13	5.06	5.19
ECHO	5.97	5.79	6.28	5.98	5.87	6.20	5.26	5.45	5.72	5.64	5.23	5.34
Exmark	6.10	5.73	6.28	6.15	6.15	6.32	5.58	5.82	5.97	5.93	5.63	5.74
Ferris	5.98	5.44	6.12	5.83	5.52	5.98	5.25	5.44	5.81	5.72	5.12	5.33
Grasshopper	6.18	6.09	6.36	6.04	6.27	6.31	5.55	5.66	5.77	5.64	5.72	5.66
Gravely	5.83	5.42	5.96	5.74	5.76	5.89	5.41	5.53	5.67	5.76	5.38	5.44
Honda	4.70	3.60	5.84	5.19	5.39	5.95	4.95	4.27	4.76	4.81	4.53	3.98
Husqvarna	4.98	4.32	5.09	4.98	4.73	5.37	4.51	4.35	5.31	5.44	4.57	4.23
Hustler	5.99	5.82	6.00	5.90	5.91	6.05	5.38	5.57	5.64	5.68	5.46	5.49
Kawasaki	6.01	5.68	6.17	5.86	5.89	6.17	5.30	5.55	5.63	5.75	5.45	5.50
Kohler	5.63	5.64	5.57	5.60	5.73	5.83	5.21	5.26	5.23	5.40	4.98	5.13
Scag	6.30	6.26	6.39	6.21	6.22	6.31	5.82	6.04	5.89	5.85	5.79	5.99
Shindaiwa	6.24	6.00	6.36	6.19	6.04	6.28	5.63	5.73	6.03	6.00	5.43	5.67
Simplicity	5.23	4.77	5.29	5.45	4.56	5.39	4.58	4.74	5.29	5.35	4.50	4.62
Snapper	4.97	4.46	5.00	5.50	4.81	5.35	4.76	4.77	5.49	5.63	4.37	4.61
Stihl	5.71	4.05	6.07	5.98	5.45	6.13	5.00	5.25	5.65	5.56	5.43	5.15
Toro	5.66	5.04	5.72	5.64	5.78	6.06	5.35	5.10	5.76	5.80	5.26	5.02
Walker	6.07	5.66	6.38	6.26	6.09	6.28	5.67	5.98	6.02	5.98	5.91	6.05
Wright Mfg	6.42	5.81	6.61	6.19	6.28	6.50	5.81	6.08	6.06	6.08	5.67	5.97

CATEGORY RATINGS

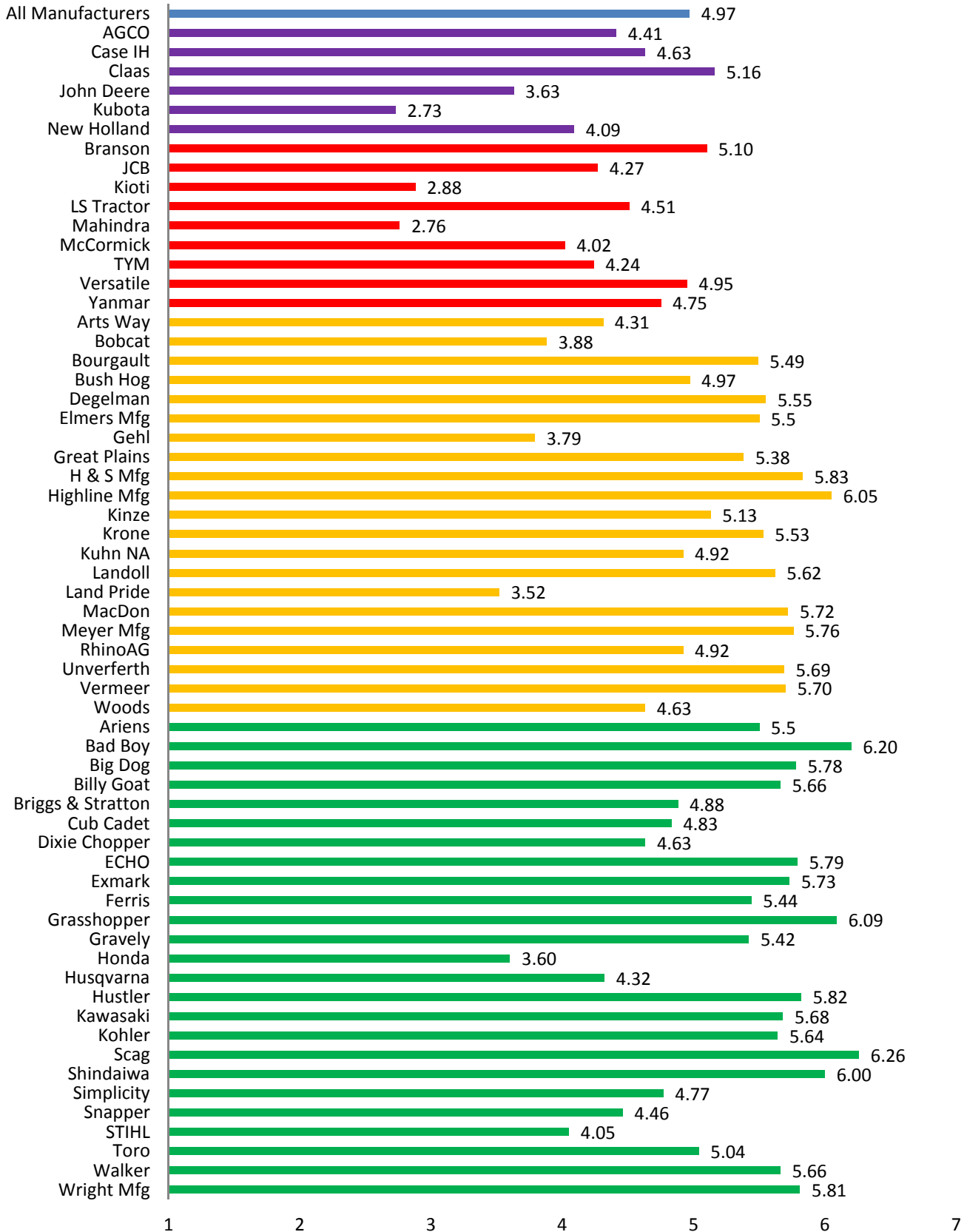


EquipmentDealers
A S S O C I A T I O N

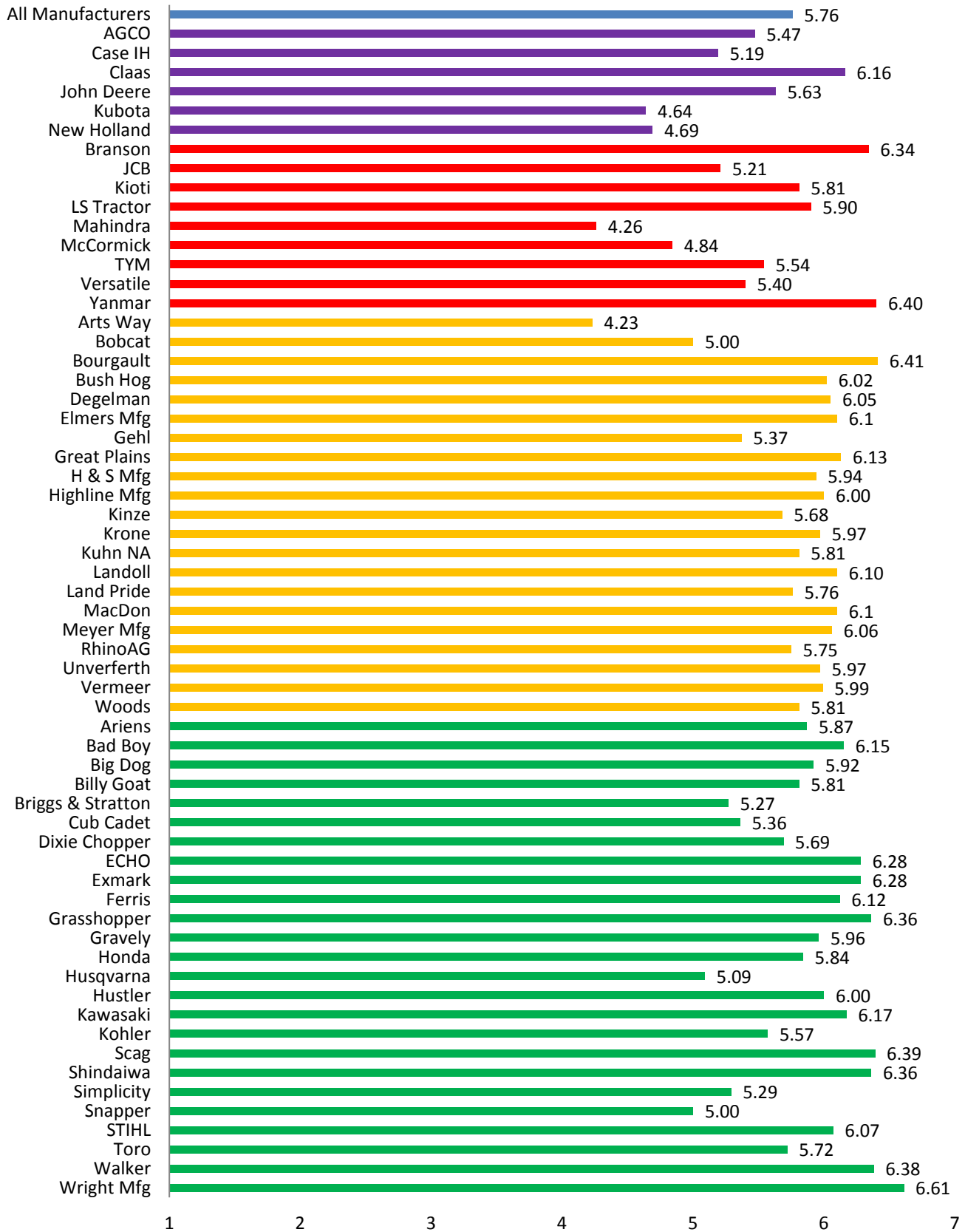
Overall Satisfaction



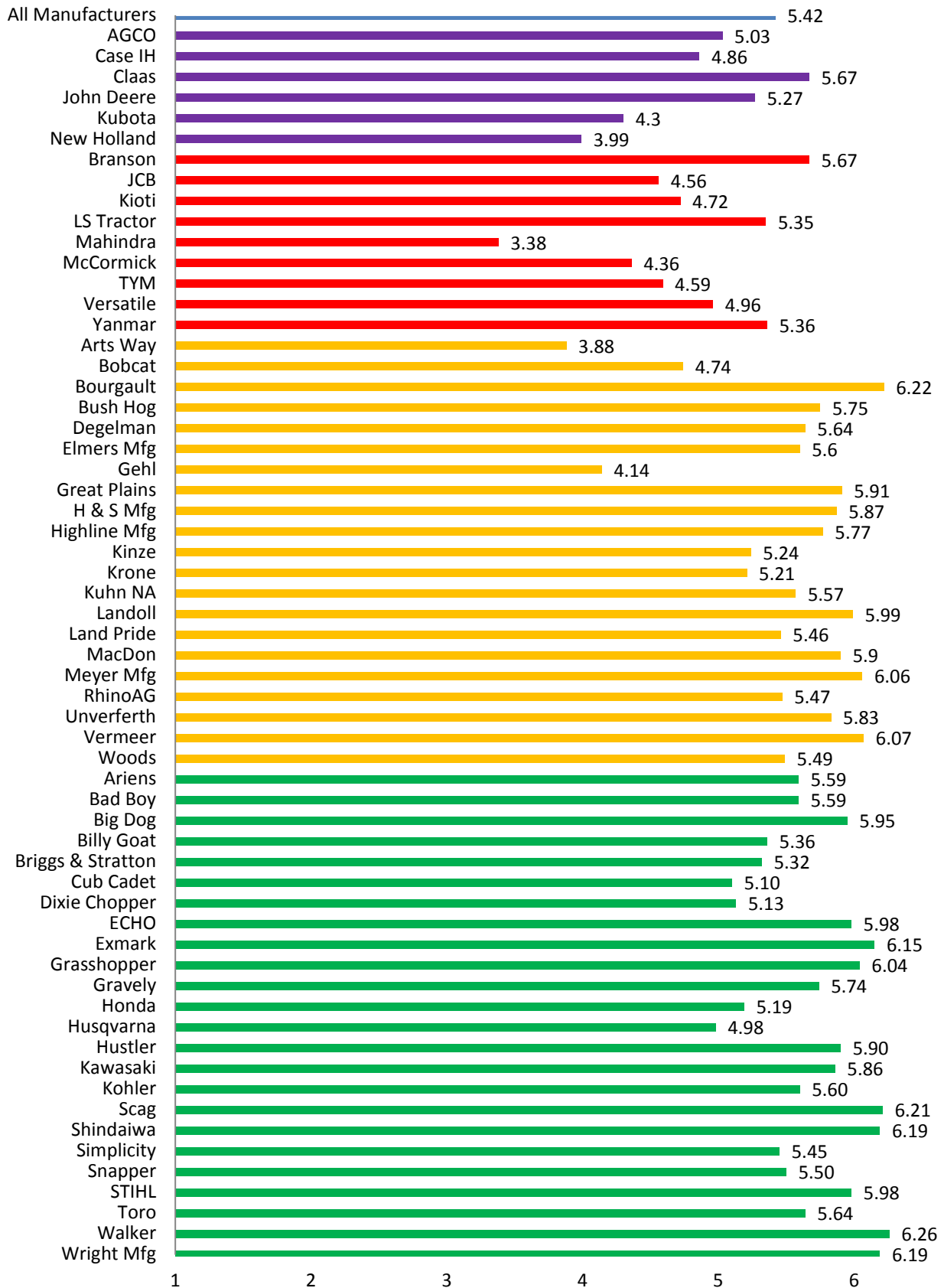
Product Availability



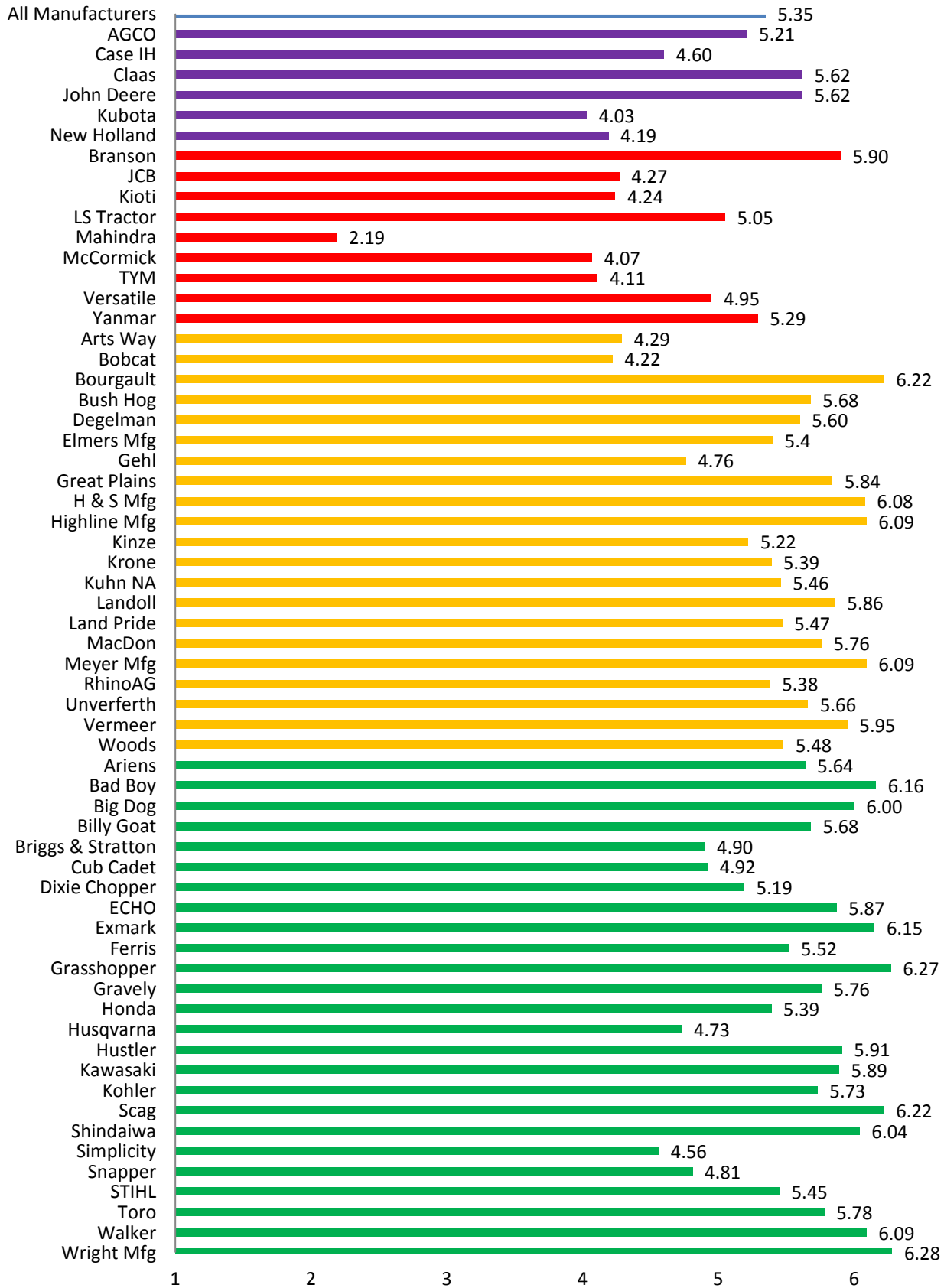
Product Quality



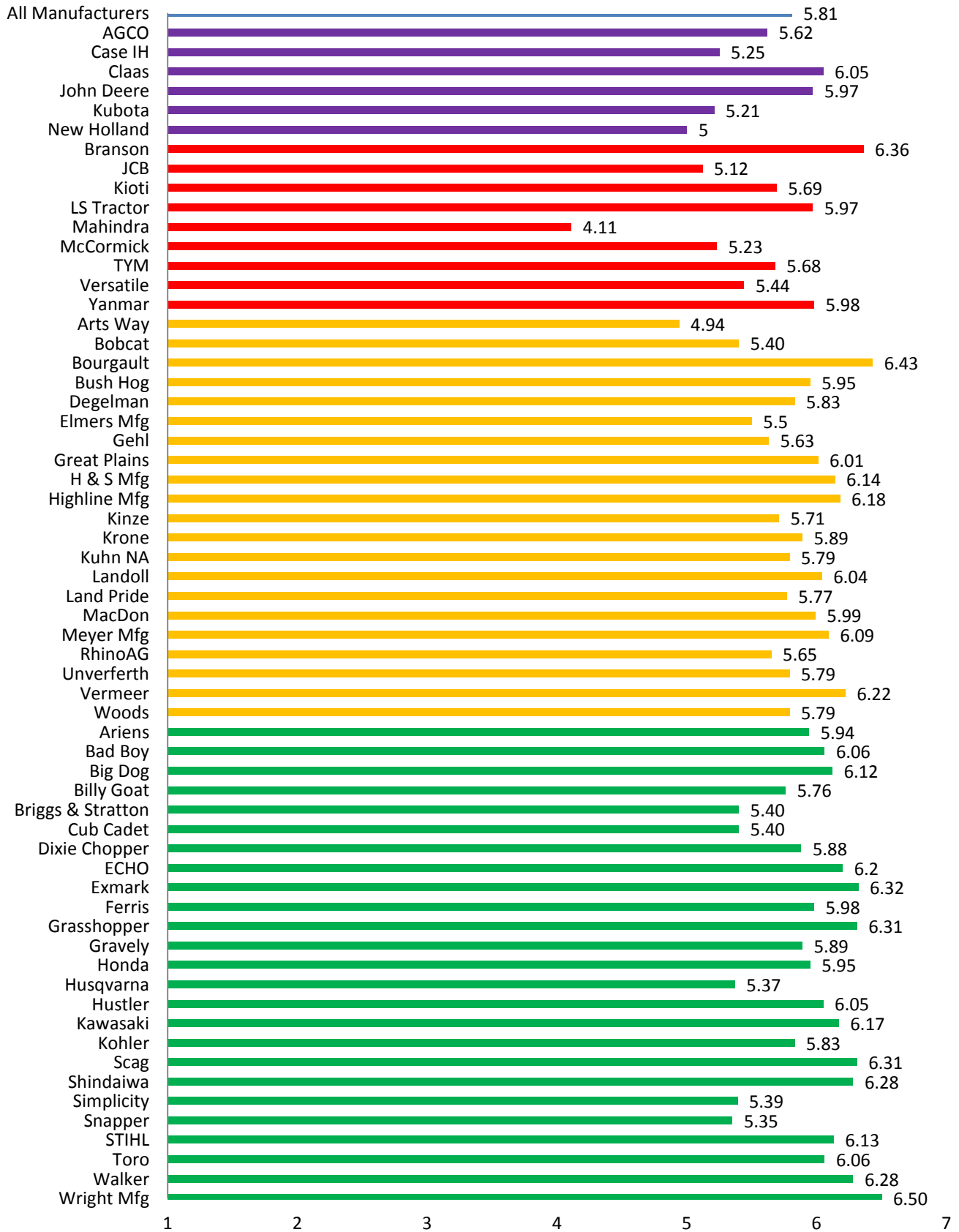
Product Technical Support



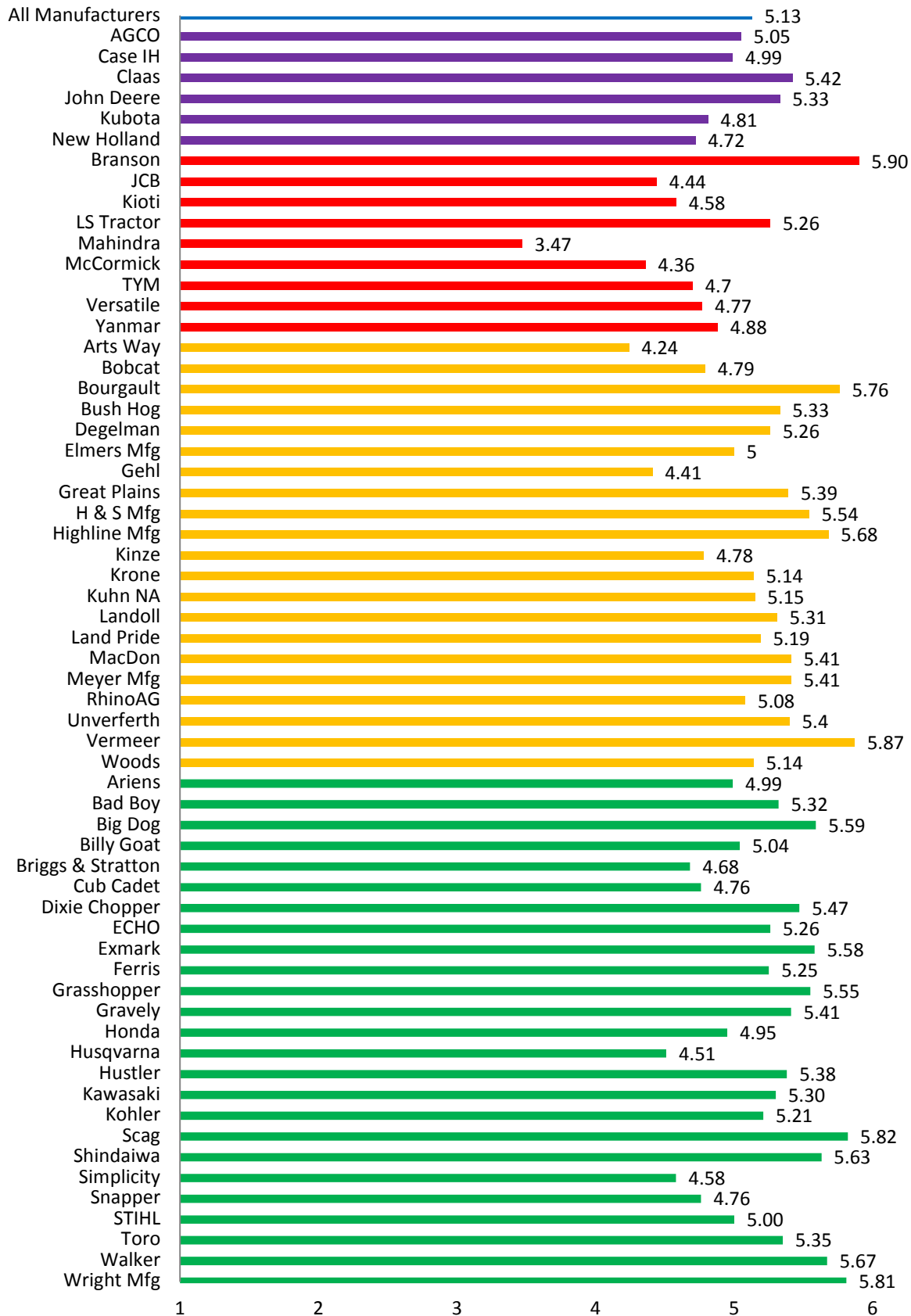
Parts Availability



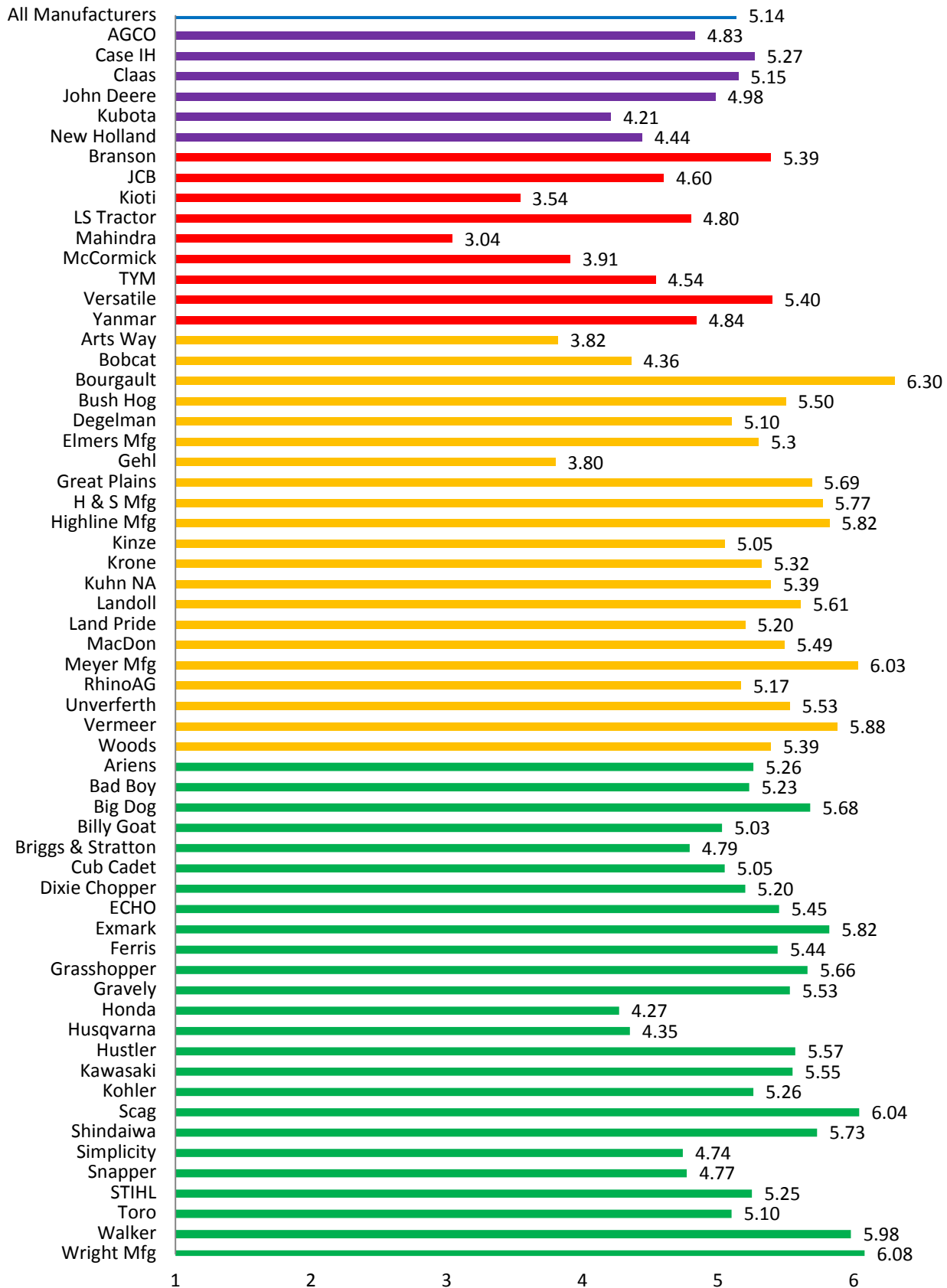
Parts Quality



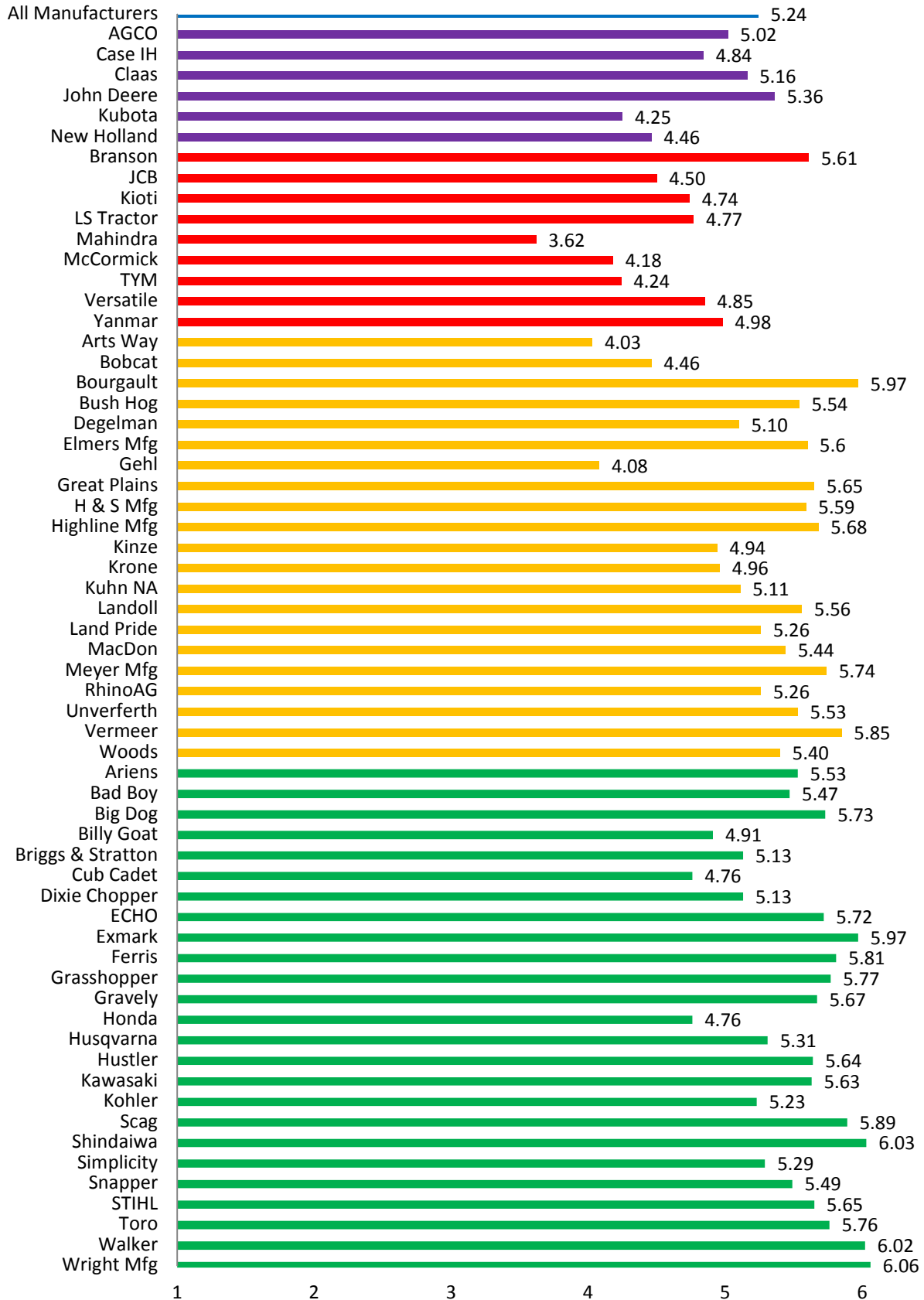
Return Privileges



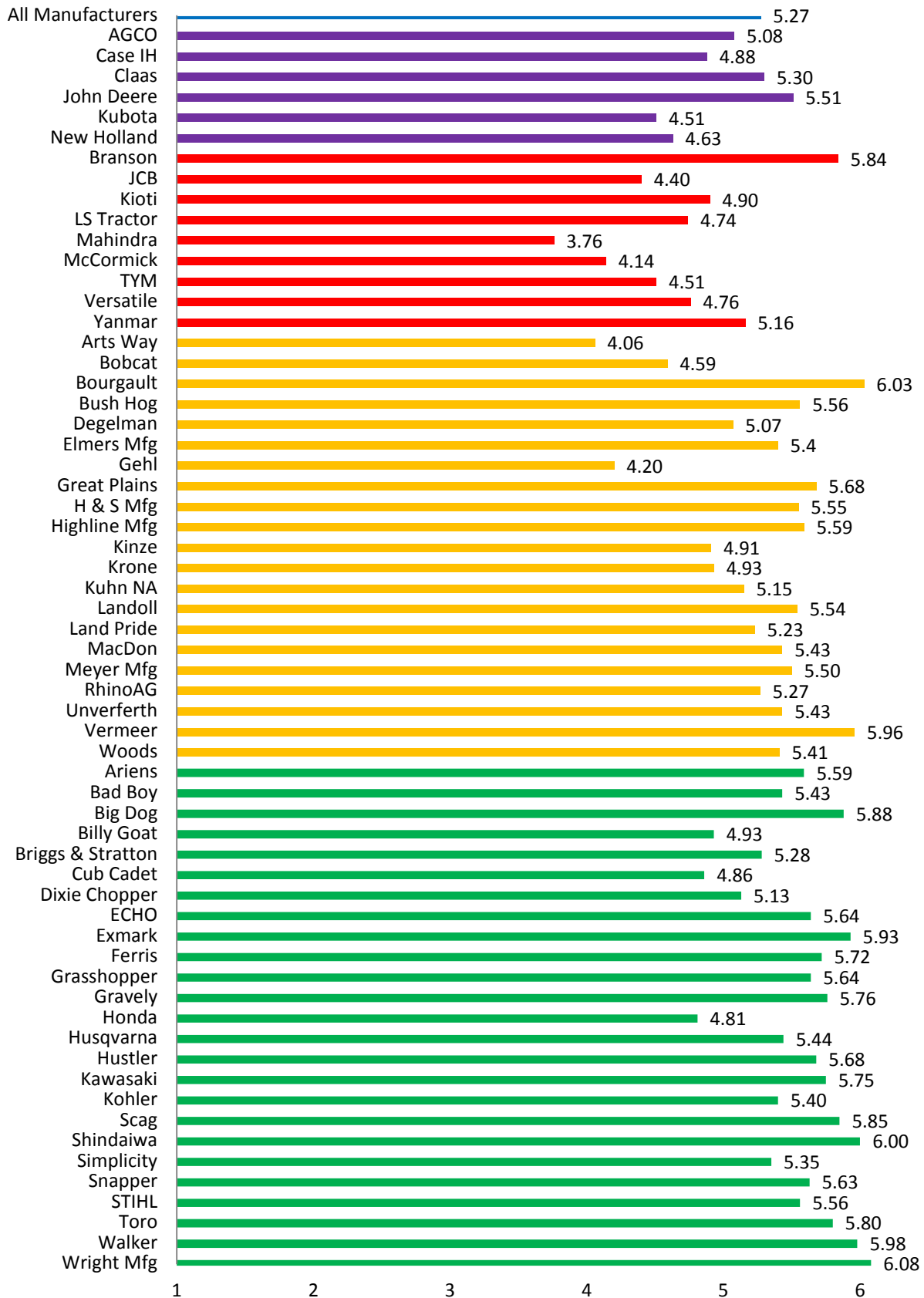
Communication with Management



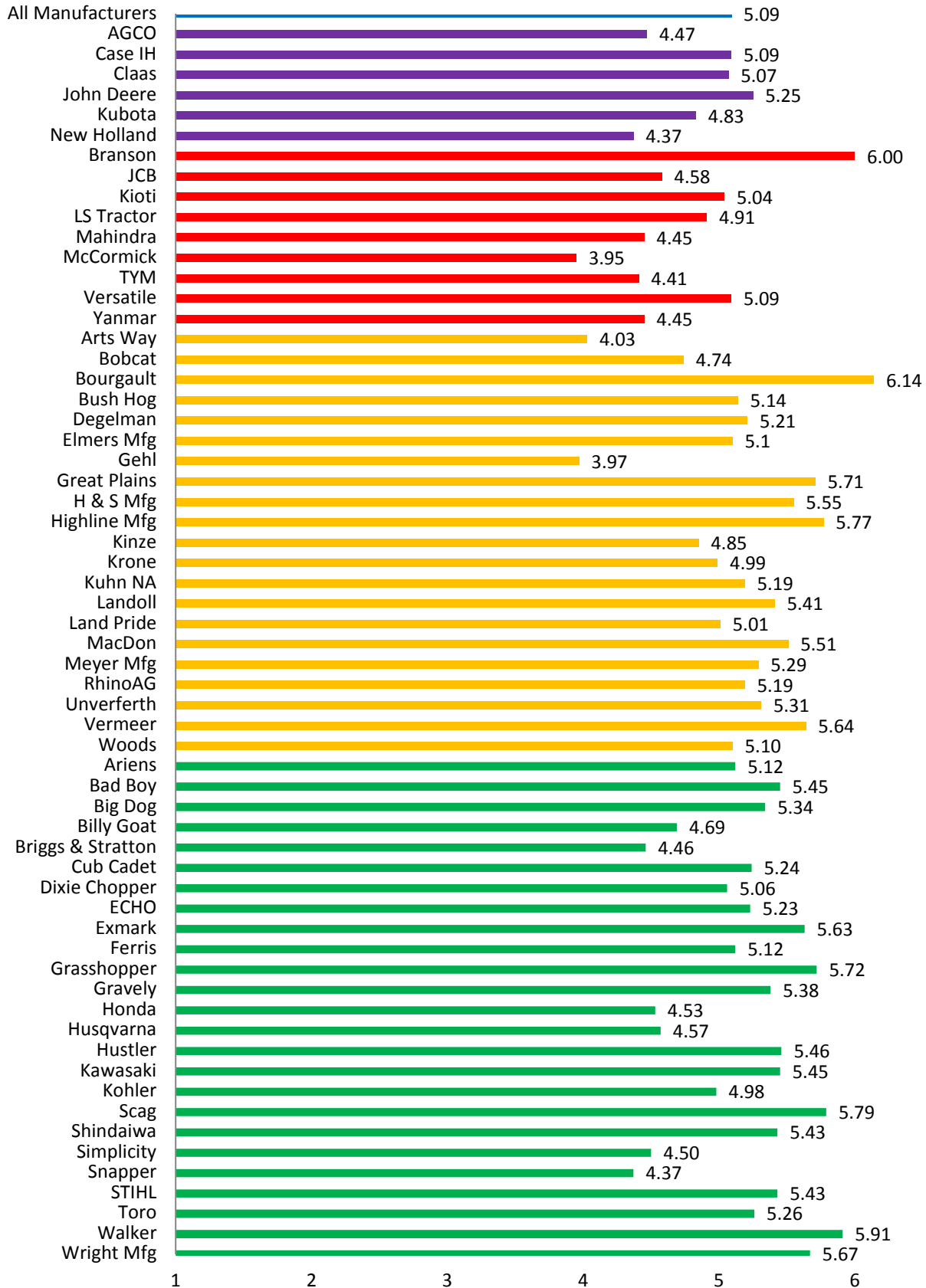
Warranty Procedures



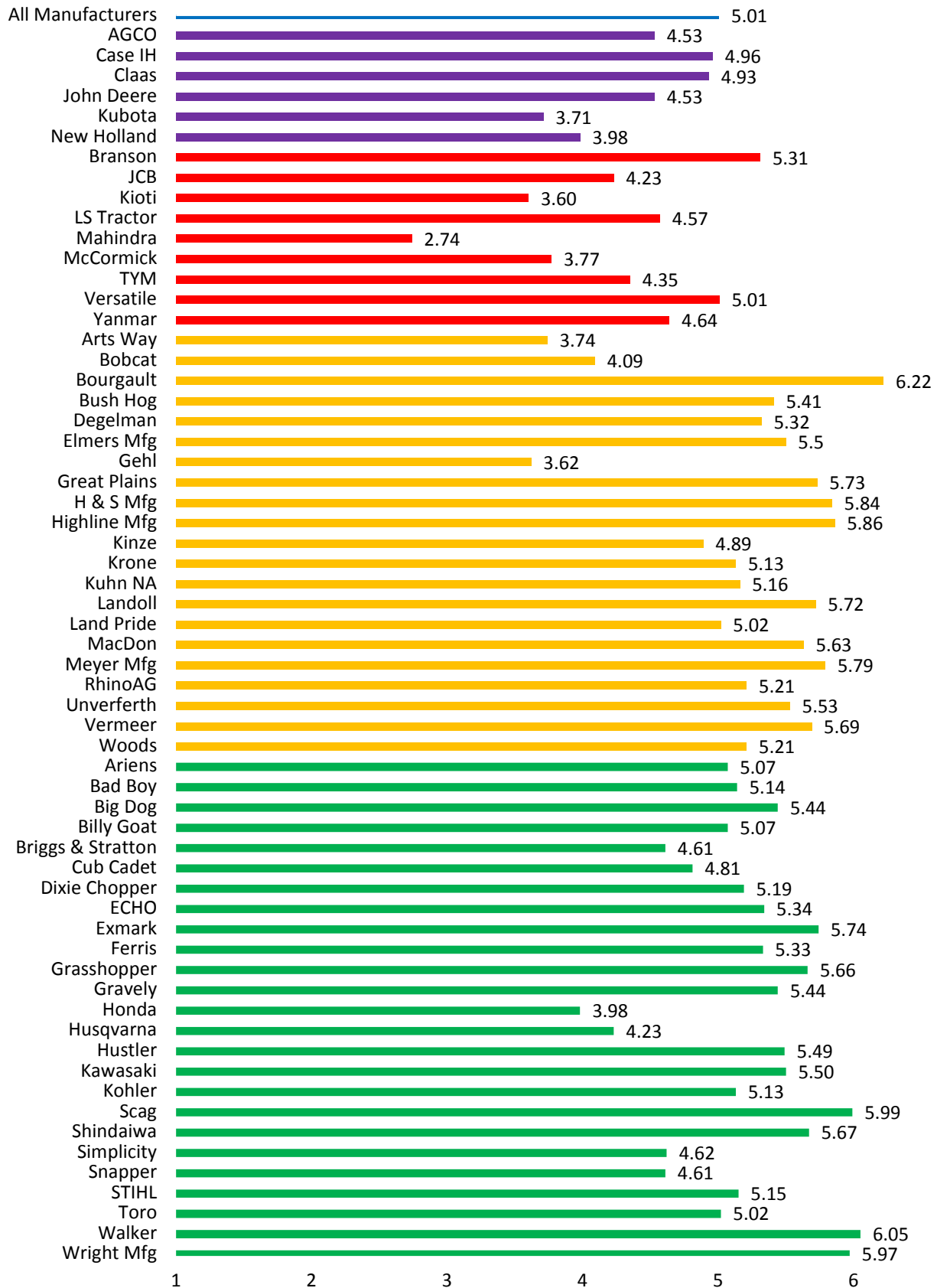
Warranty Payments



Marketing & Advertising Support



Manufacturer Response to Dealer Needs & Concerns



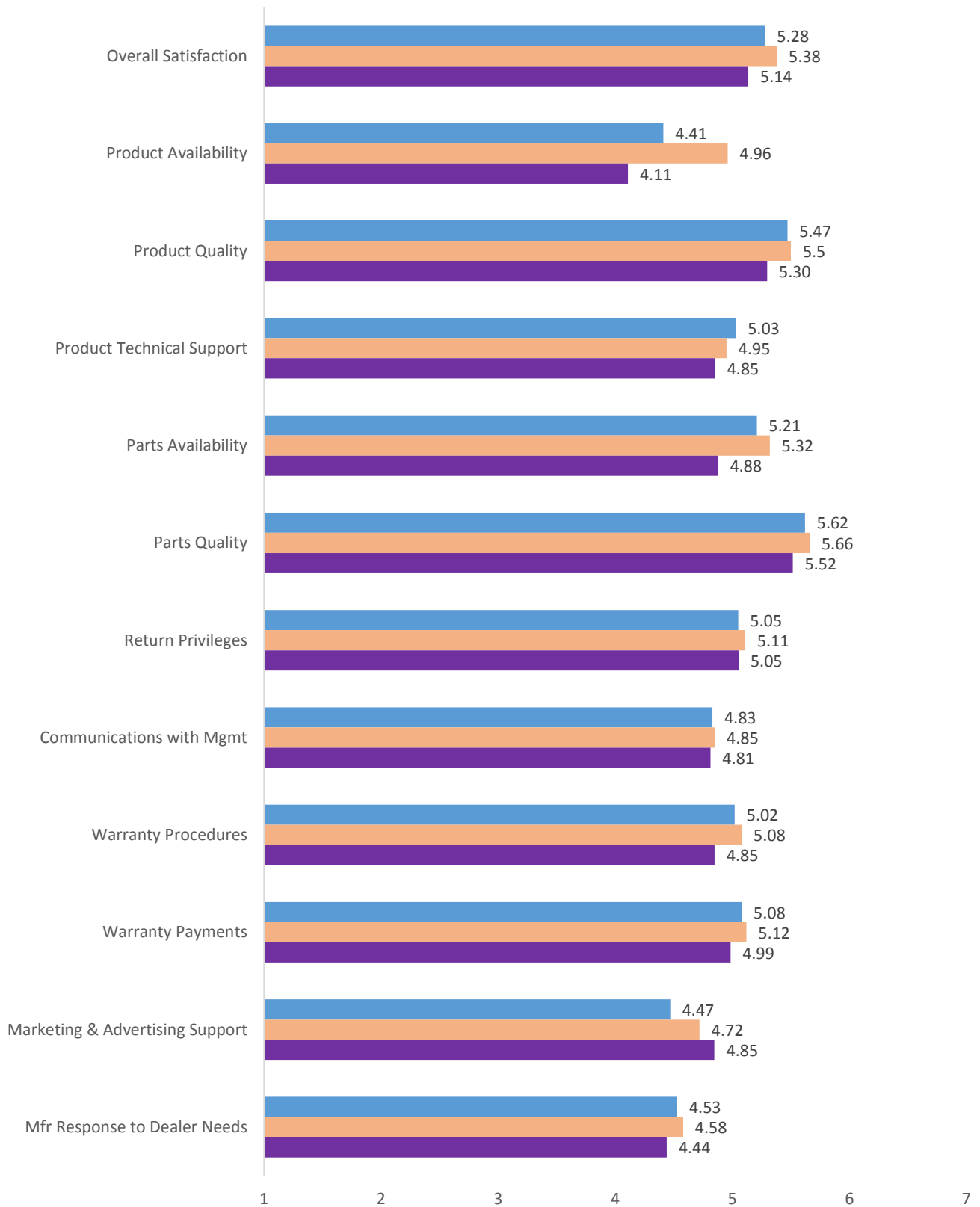
RATINGS BY BRAND/MANUFACTURER



EquipmentDealers
A S S O C I A T I O N

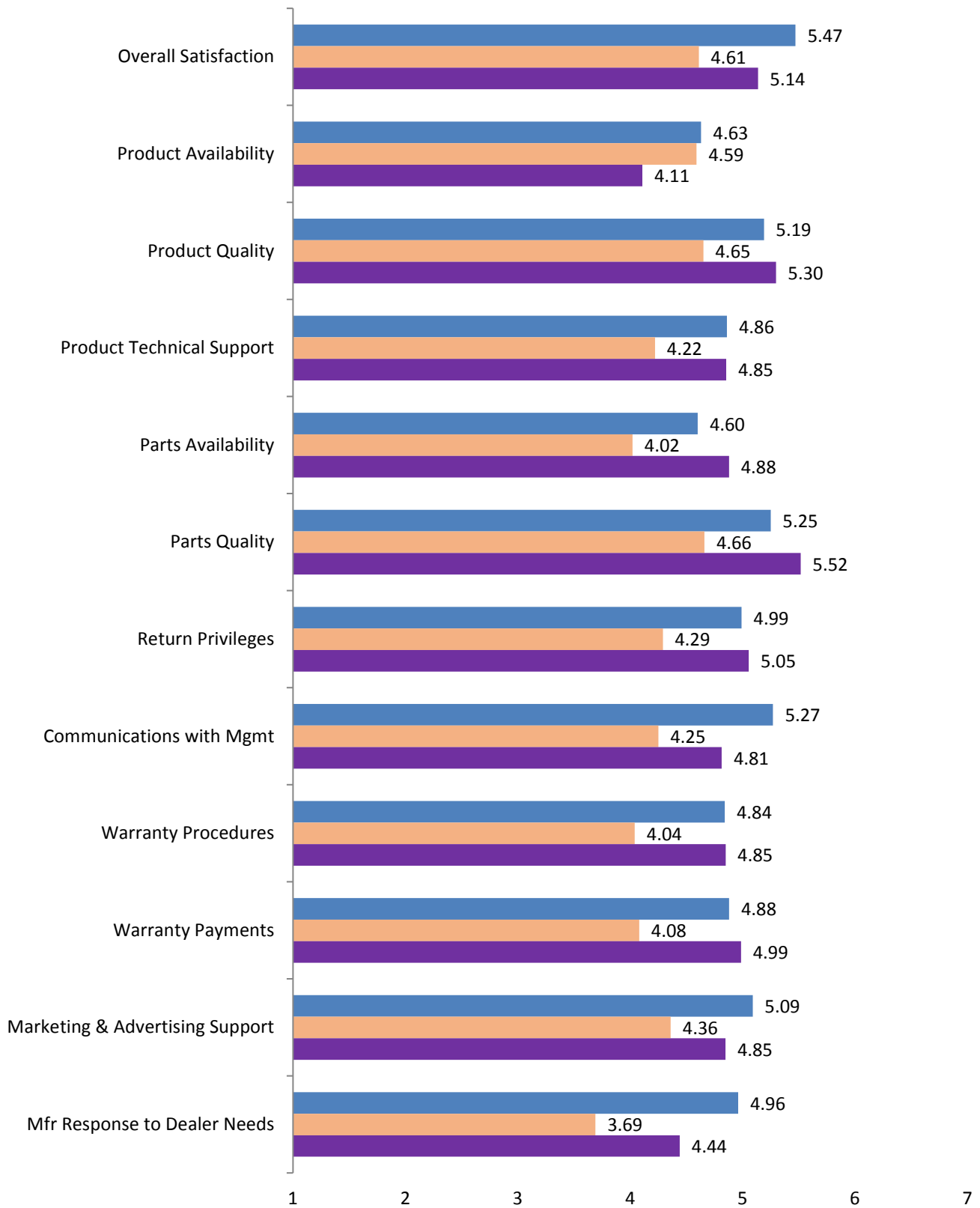
AGCO

■ 2021 Rating ■ 2020 Rating ■ All Full-Line Mfr Rating 2021



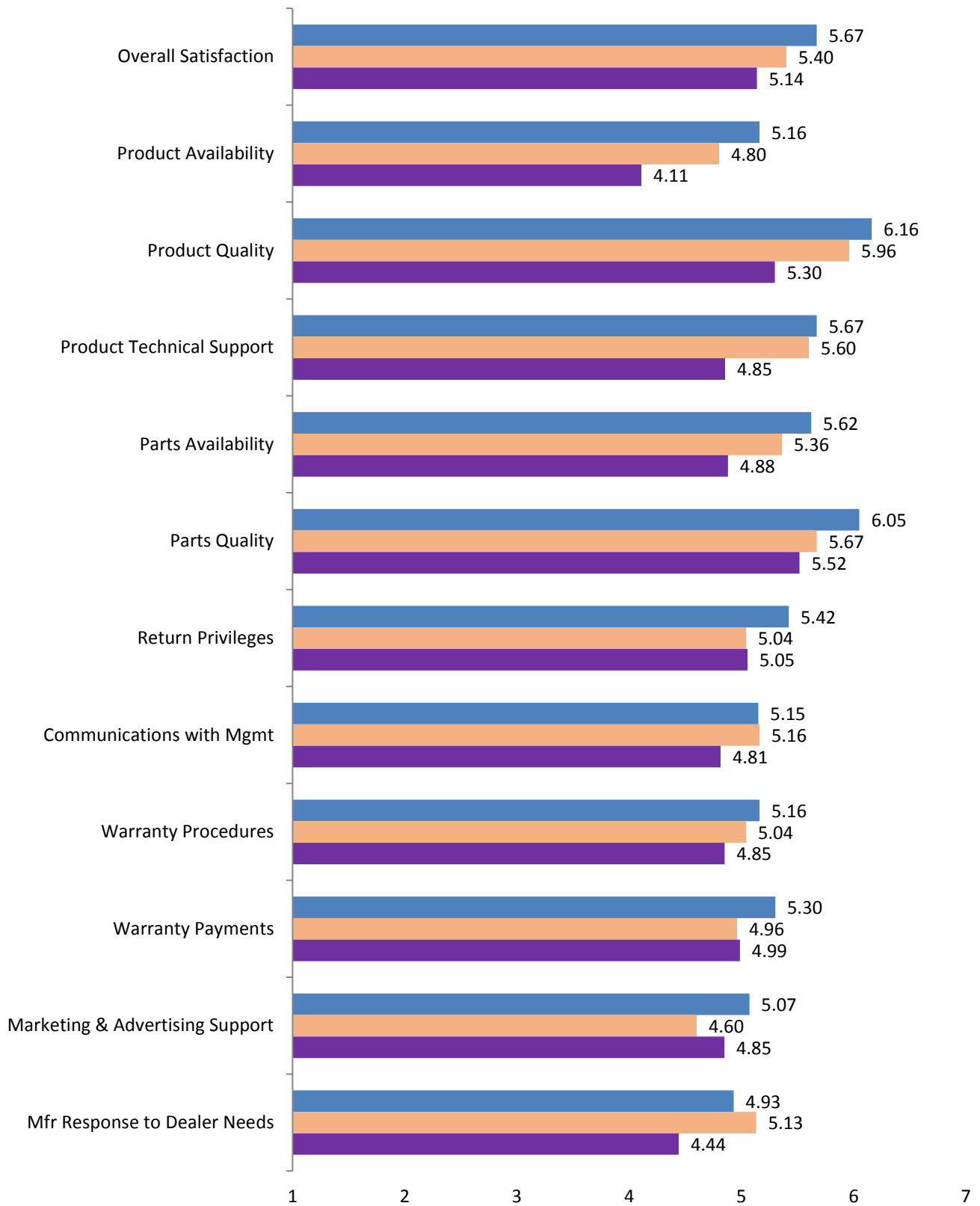
Case IH

■ 2021 Rating ■ 2020 Rating ■ All Full-Line Mfr Rating 2021



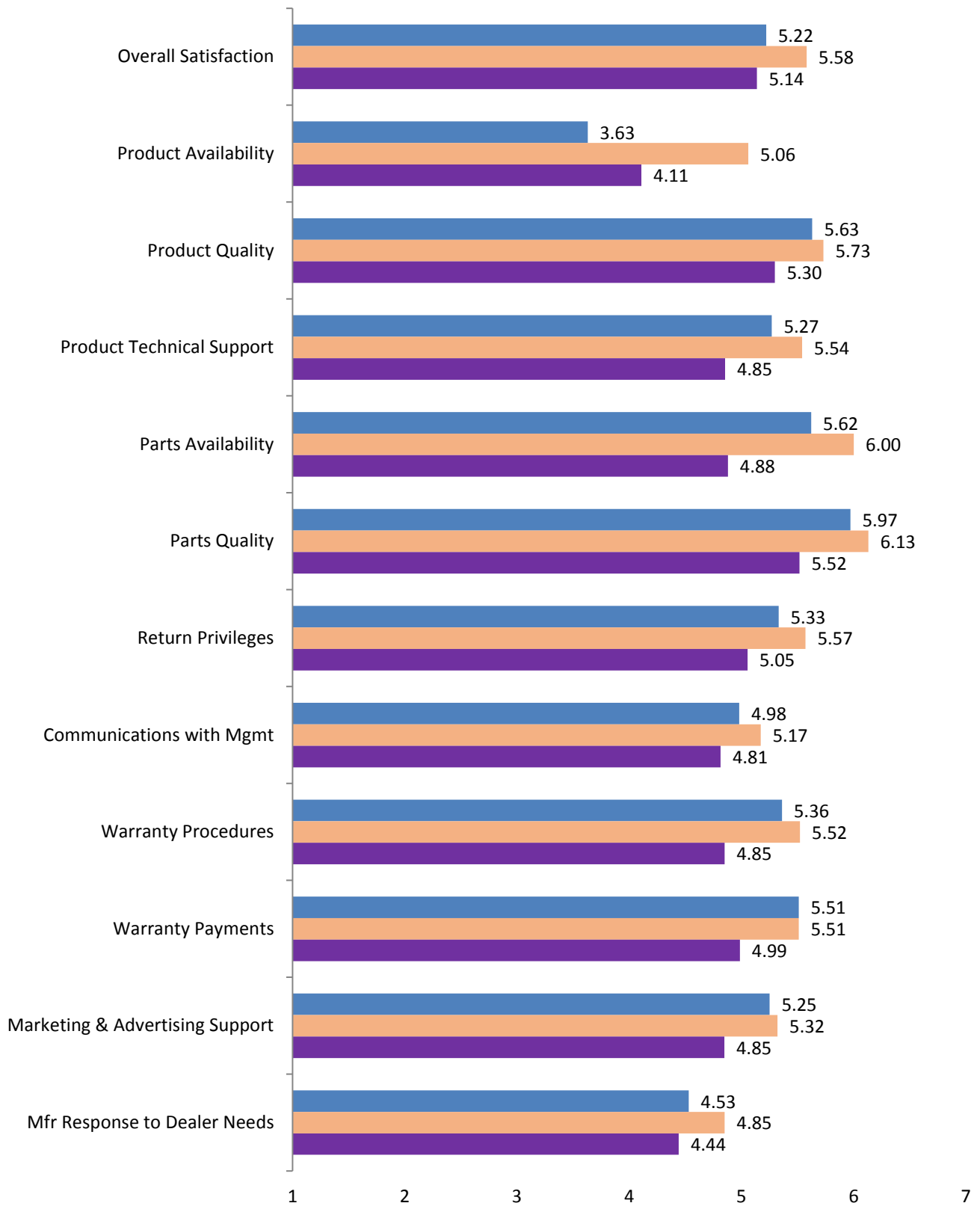
Claas

■ 2021 Rating ■ 2020 Rating ■ All Full-Line Mfr Rating 2021



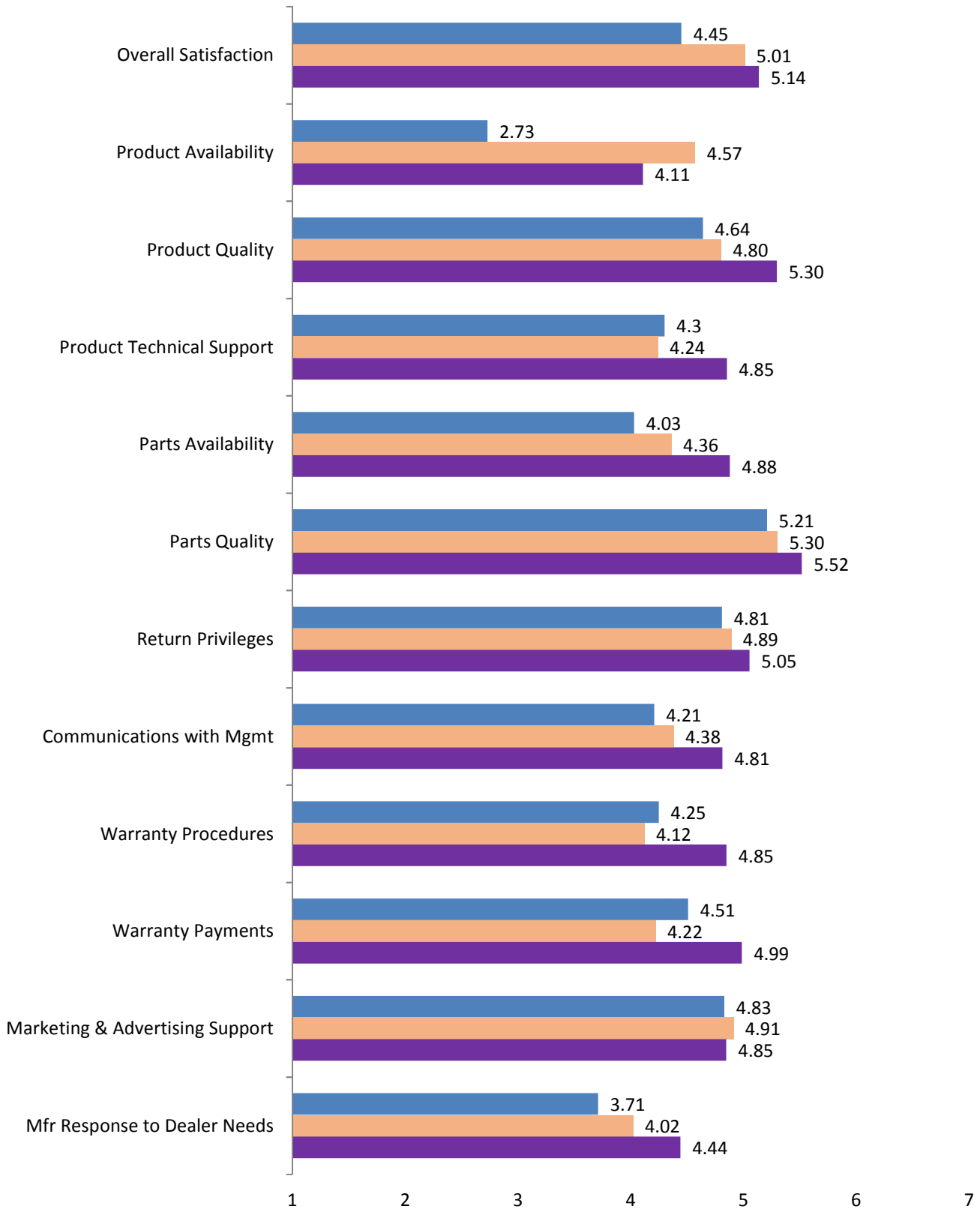
John Deere

■ 2021 Rating ■ 2020 Rating ■ All Full-Line Mfr Rating 2021



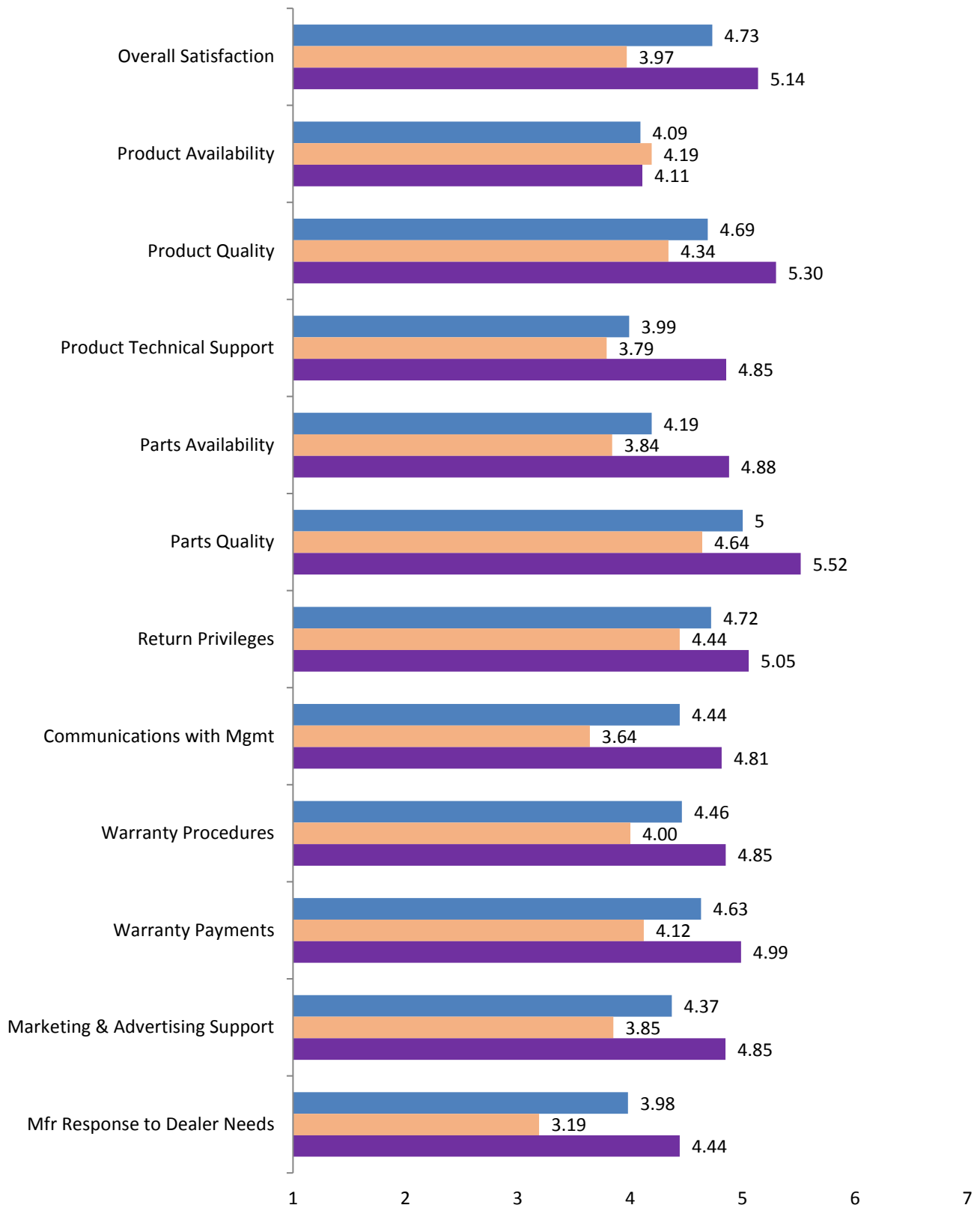
Kubota

■ 2021 Rating ■ 2020 Rating ■ All Full-Line Mfr Rating 2021



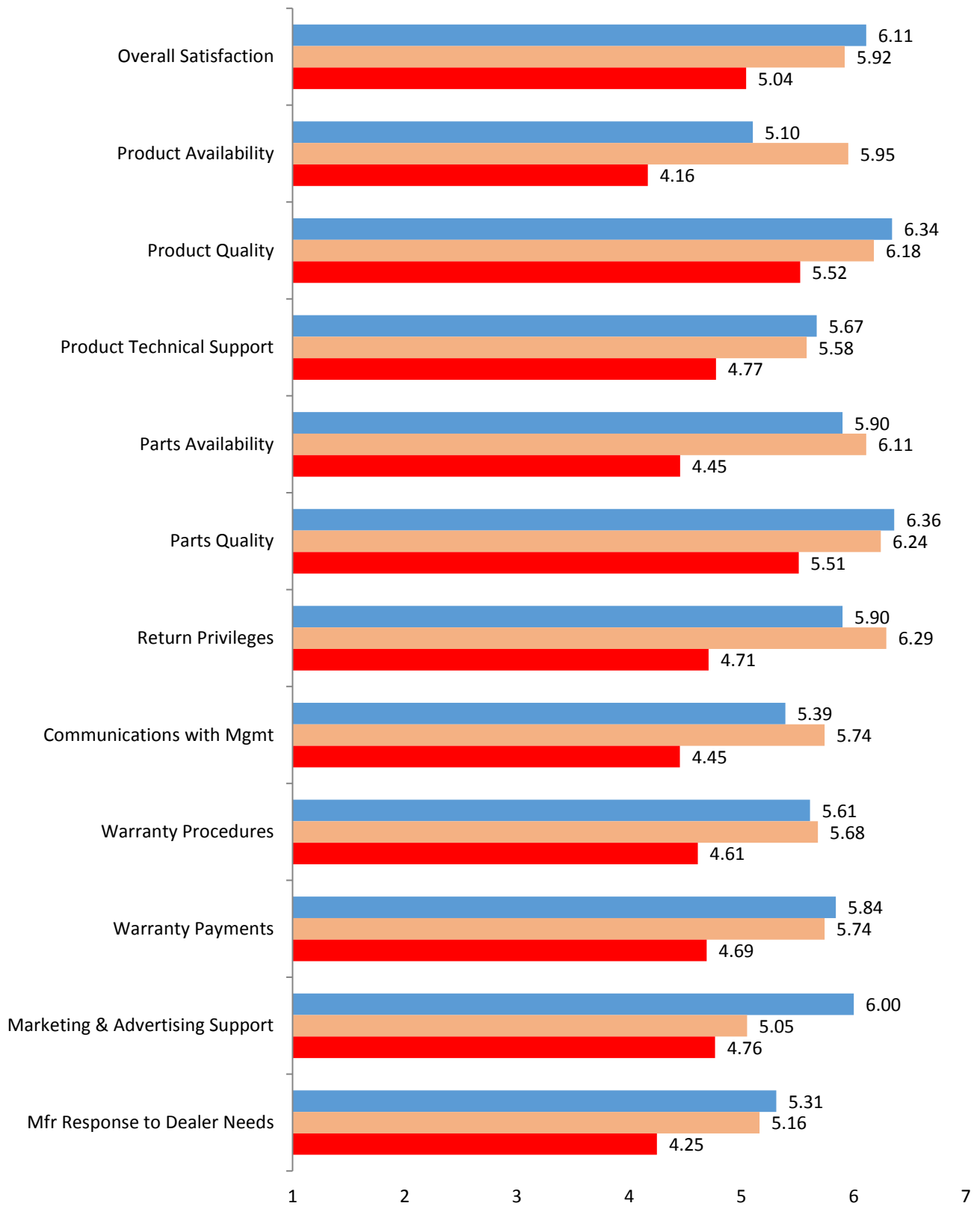
New Holland

■ 2021 Rating ■ 2020 Rating ■ All Full-Line Mfr Rating 2021

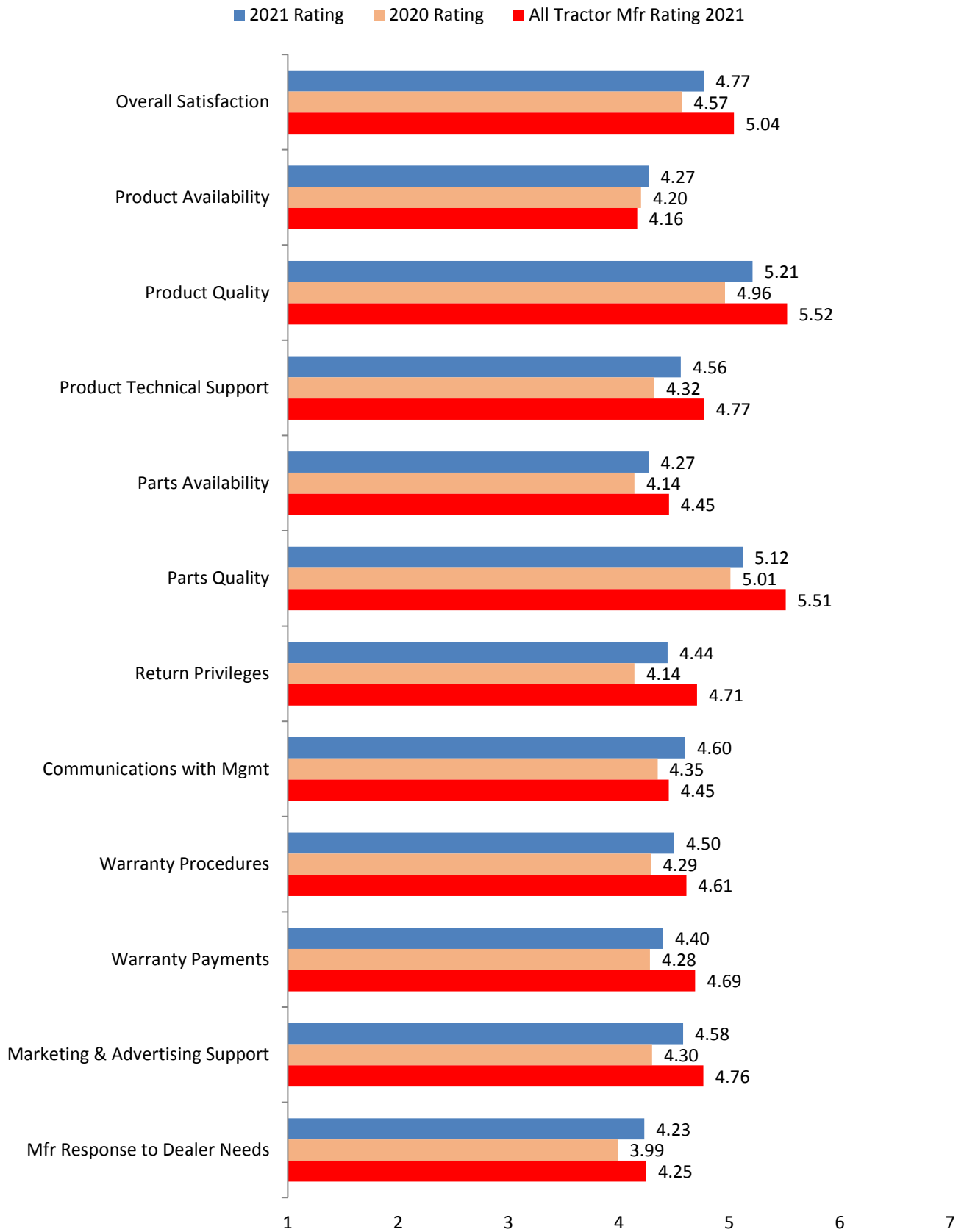


Branson

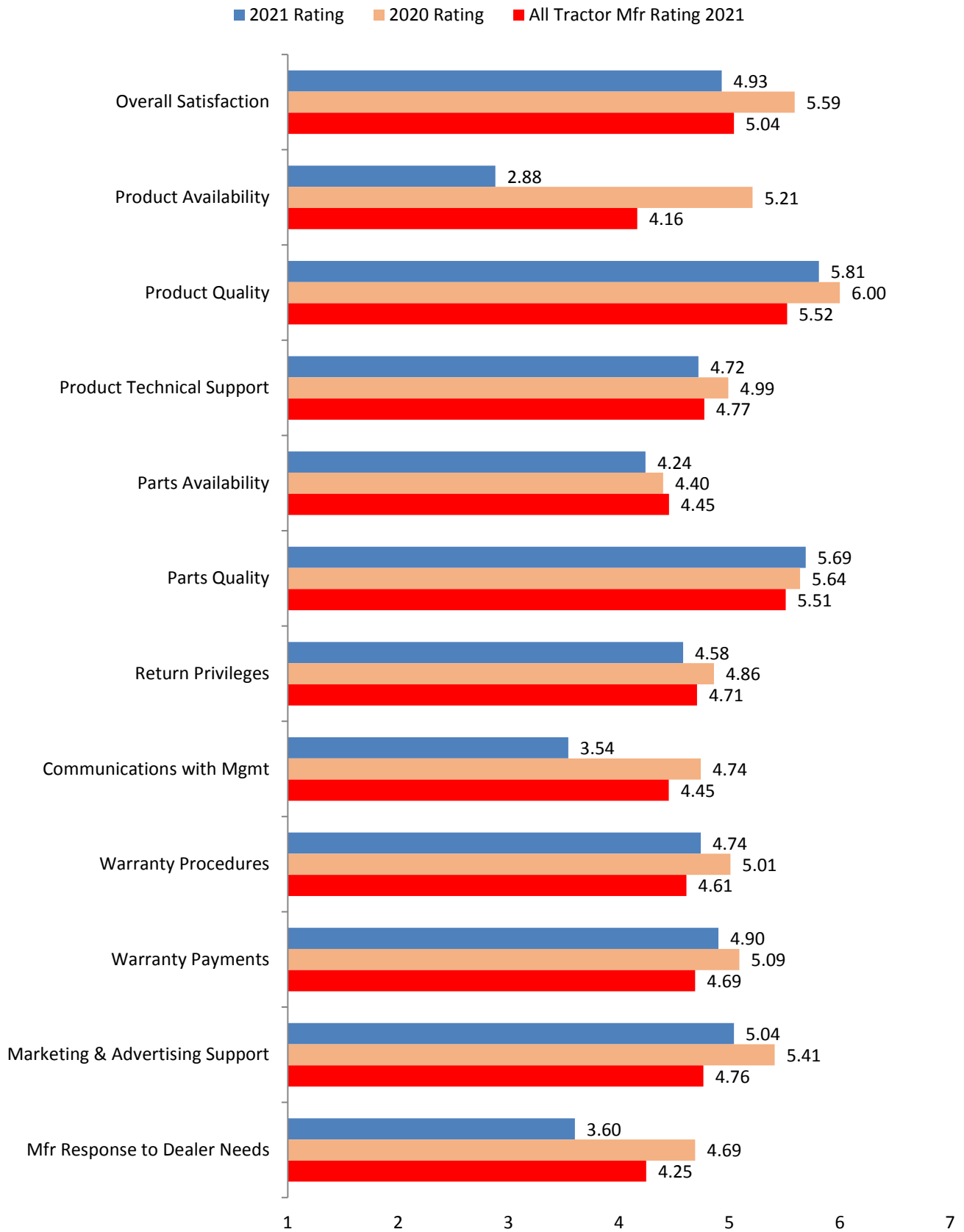
■ 2021 Rating ■ 2020 Rating ■ All Tractor Mfr Rating 2021



JCB

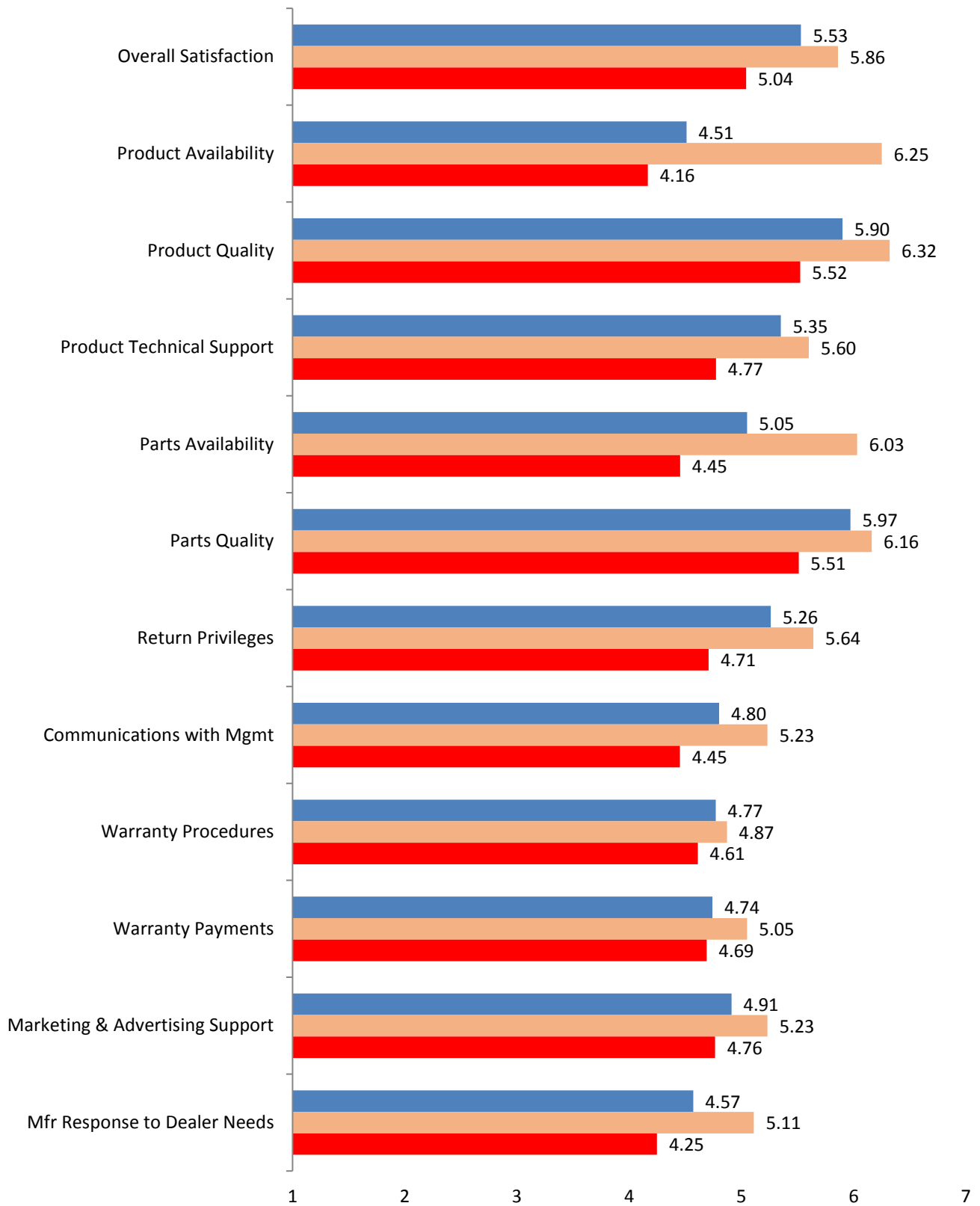


Kioti



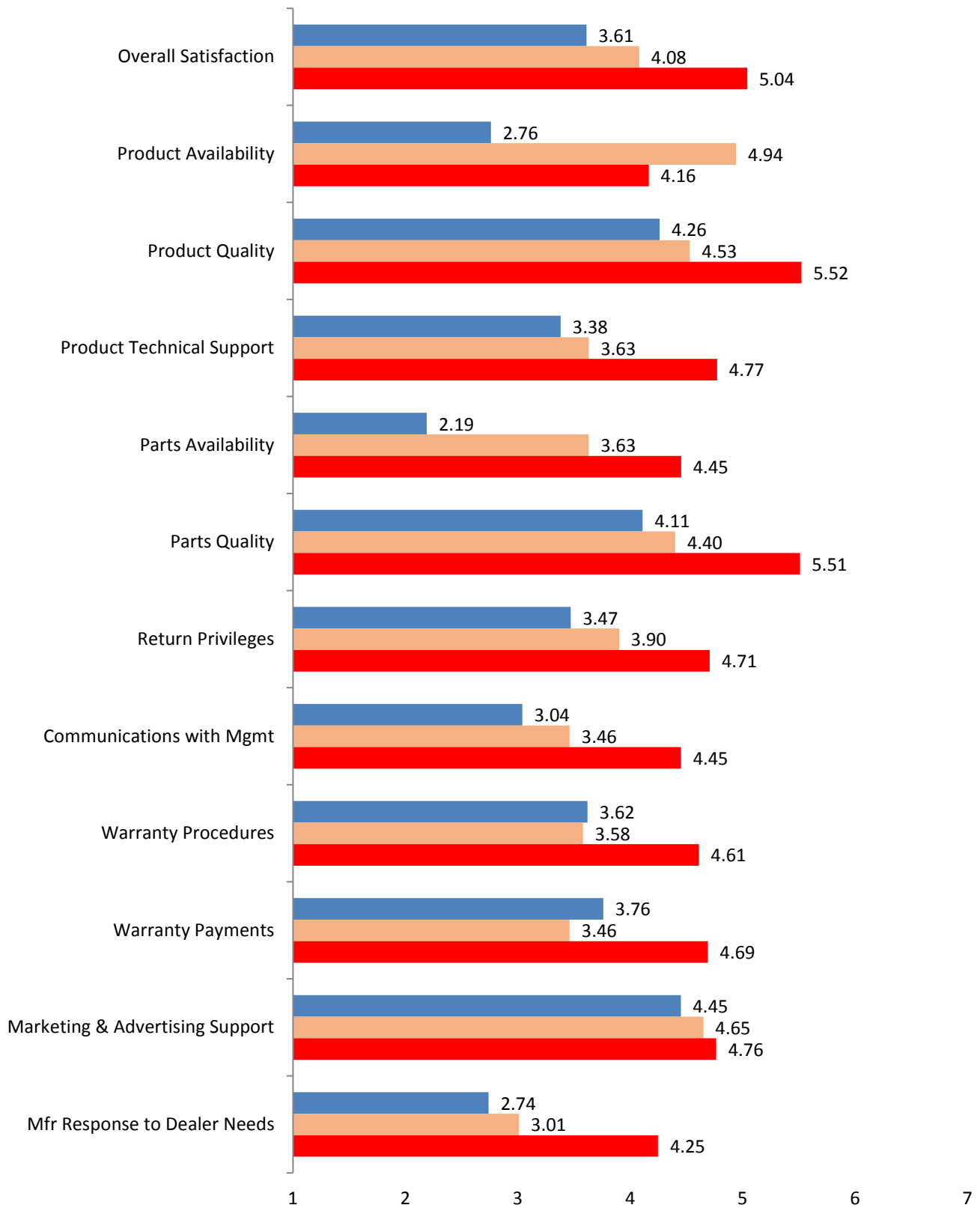
LS Tractor

■ 2021 Rating ■ 2020 Rating ■ All Tractor Mfr Rating 2021



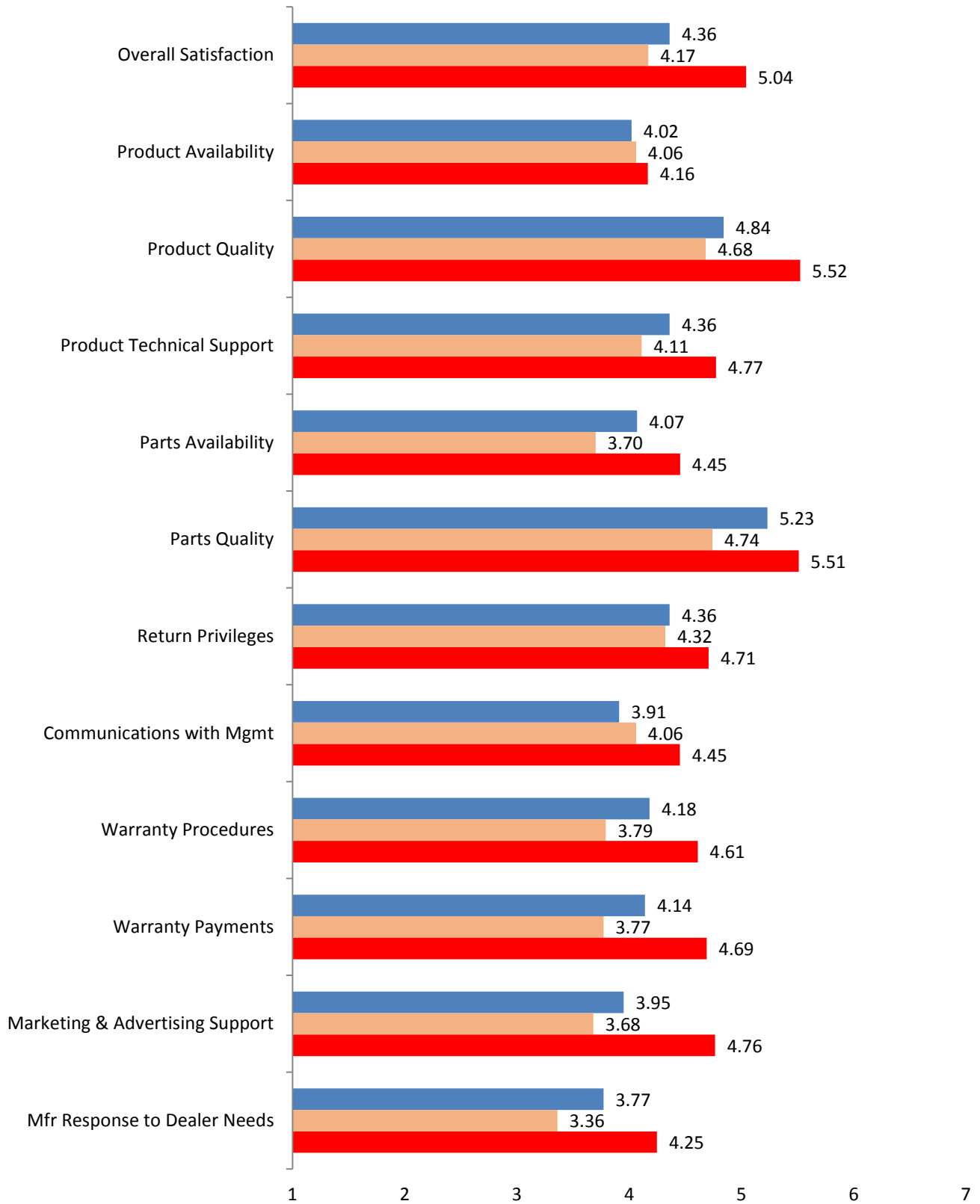
Mahindra

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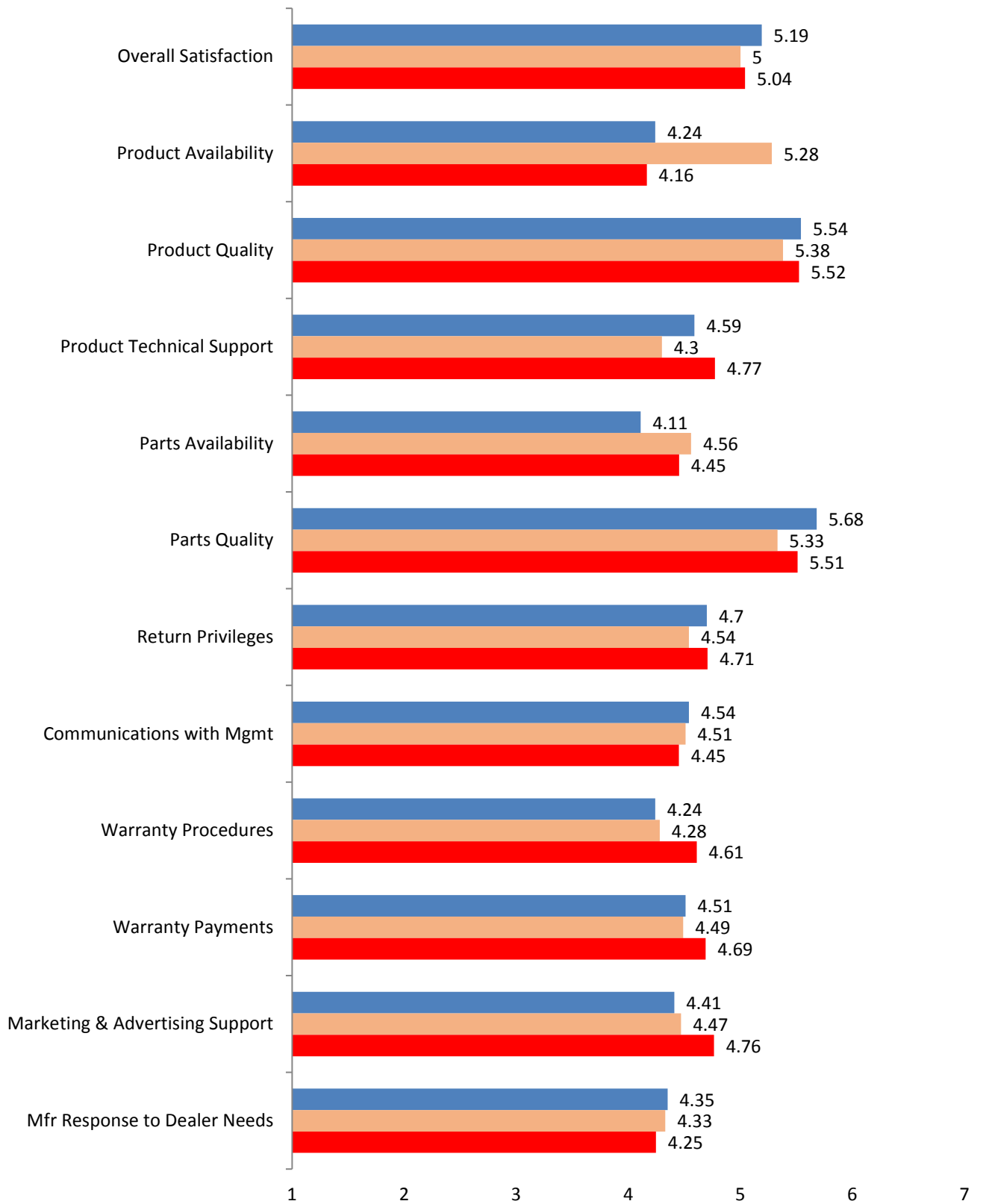
McCormick

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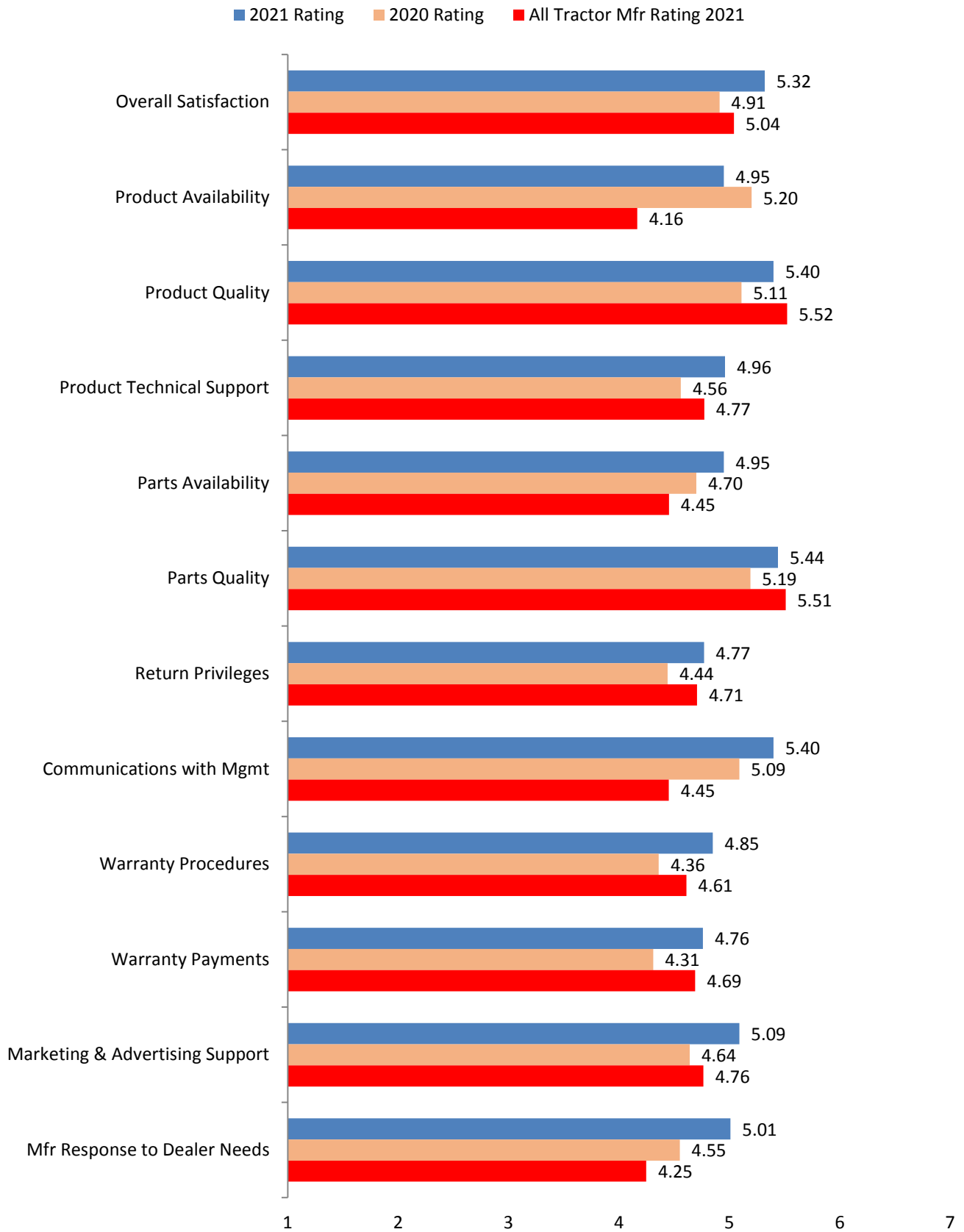


TYM

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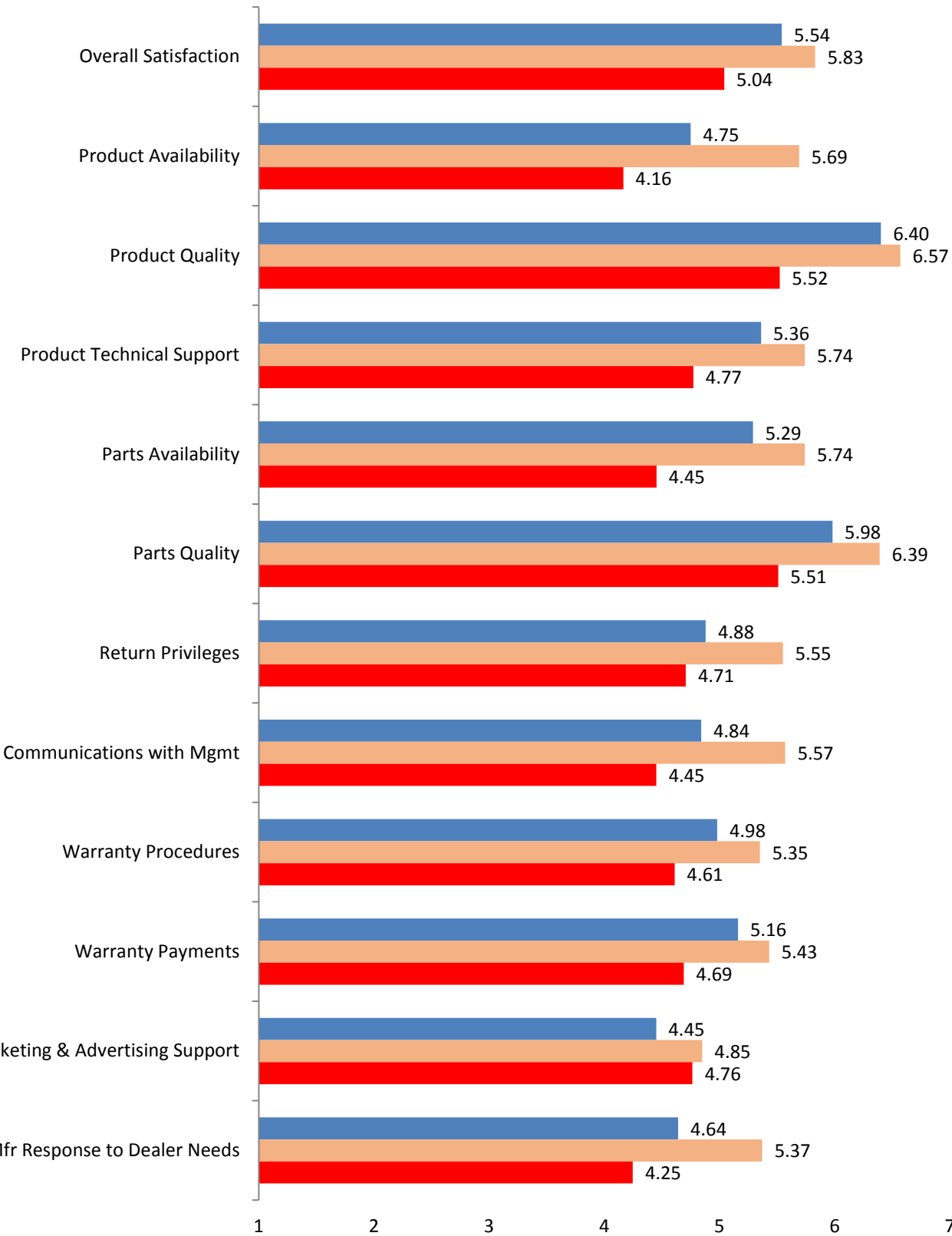


Versatile



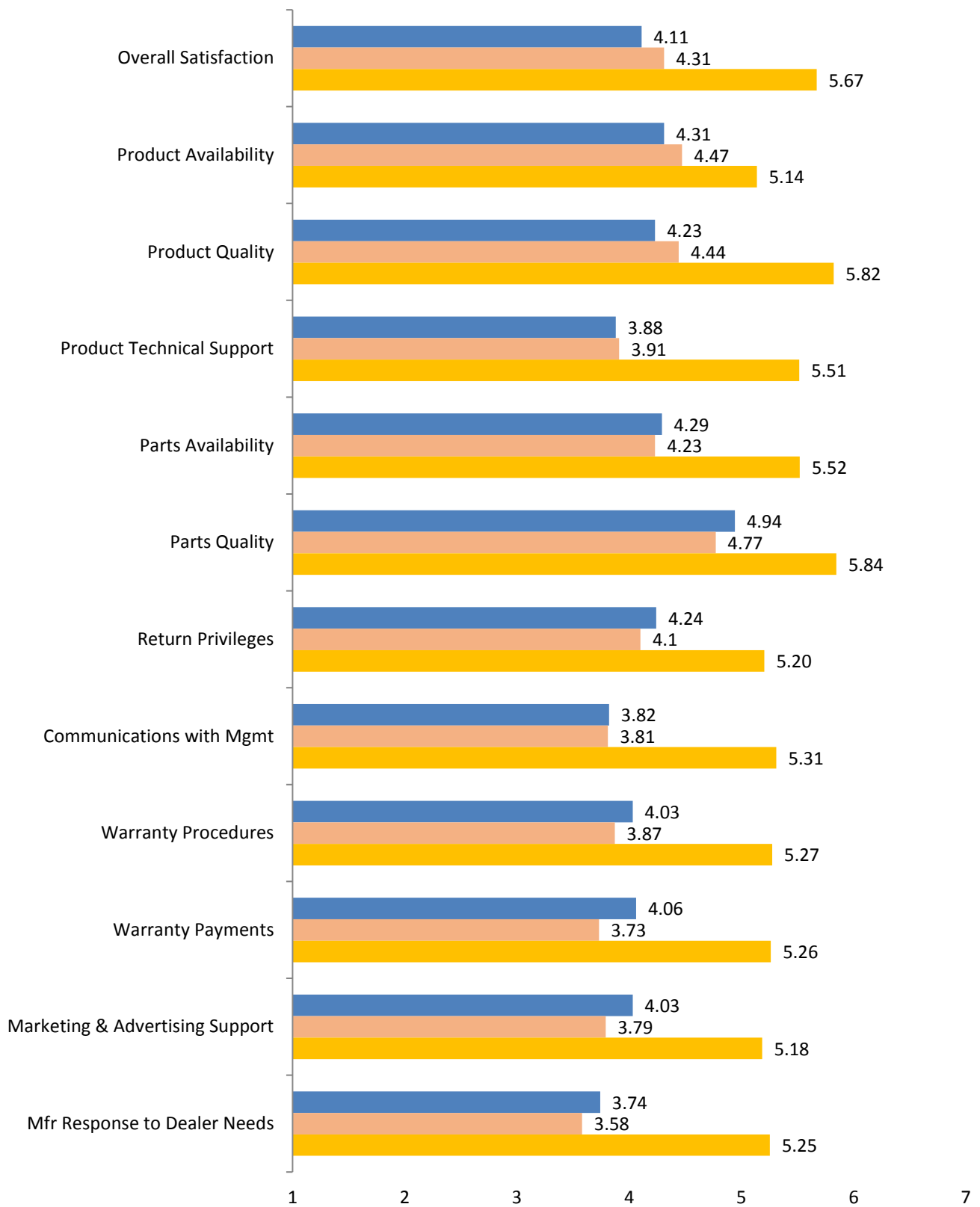
Yanmar

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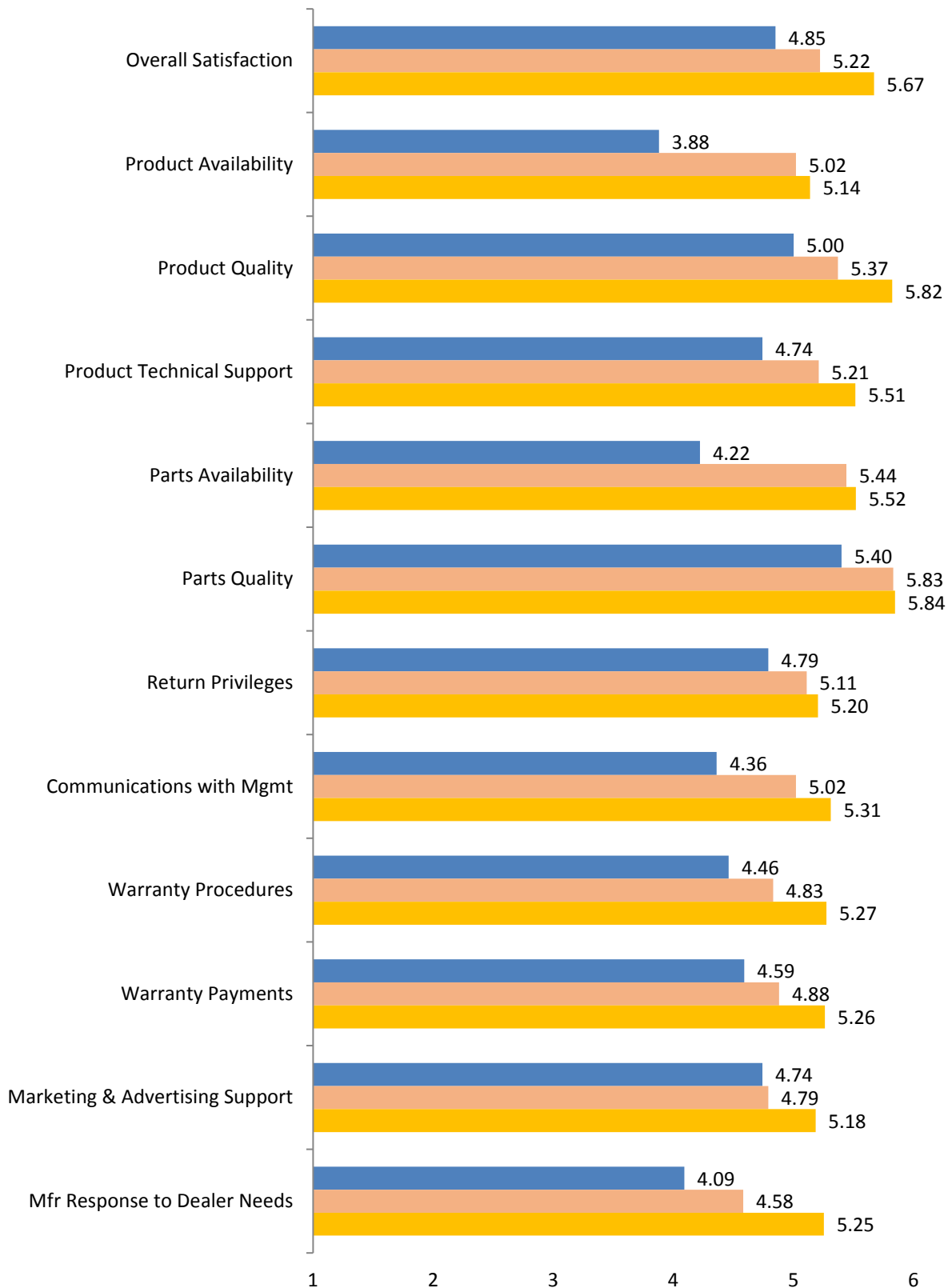
Art's Way

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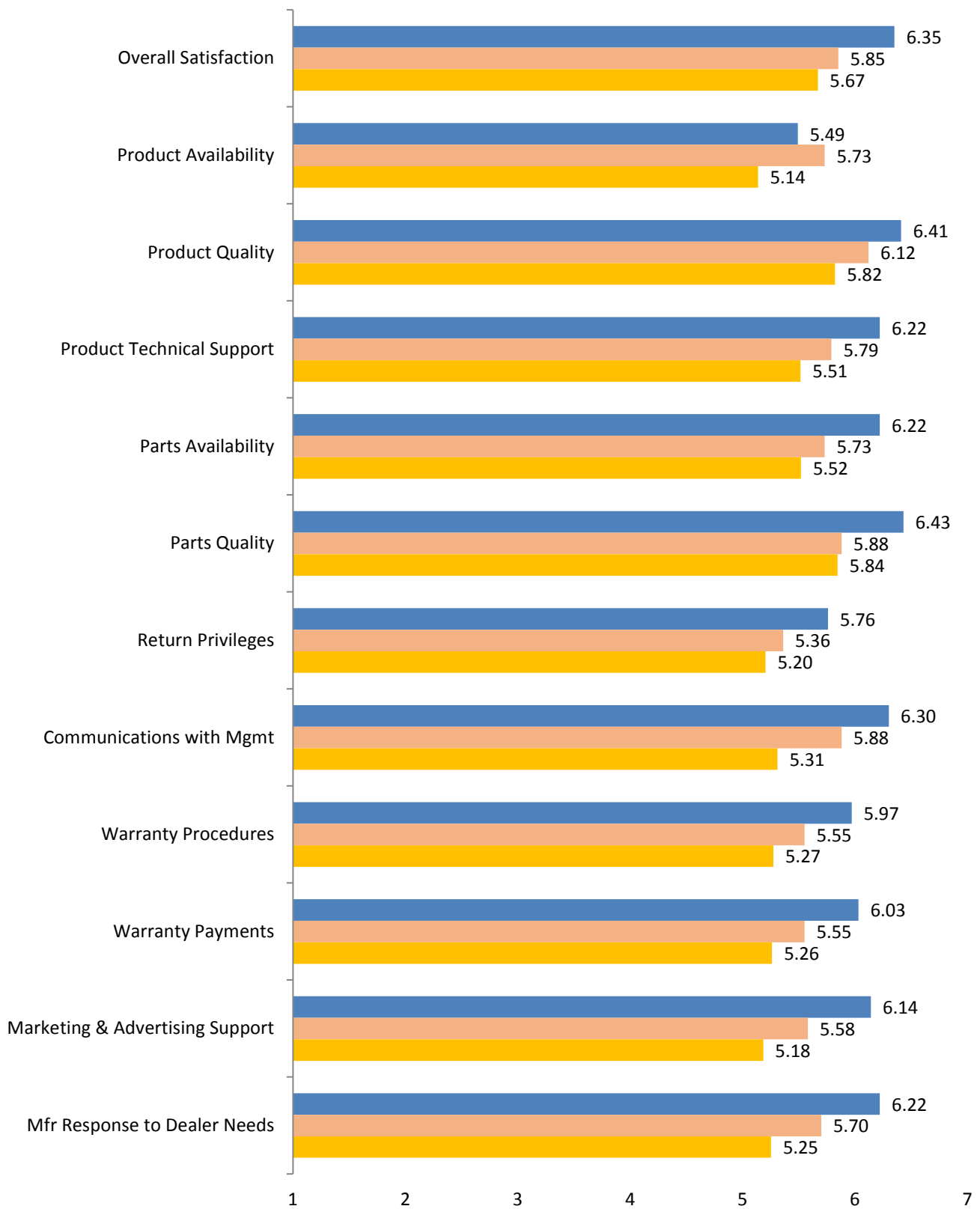
Bobcat (Doosan)

■ 2021 Rating ■ 2020 Rating ■ All Shortline Mfr Rating 2021



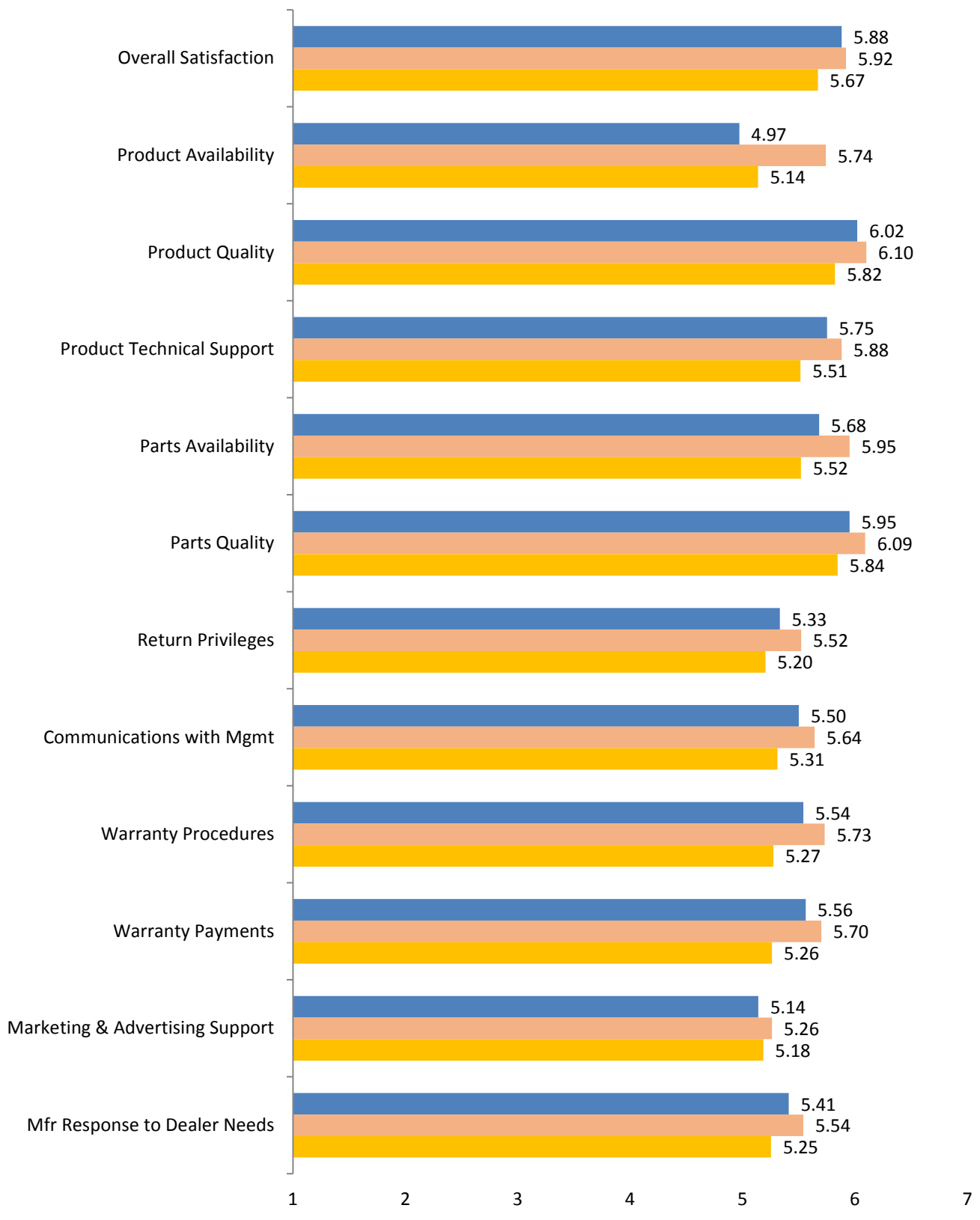
Bourgault

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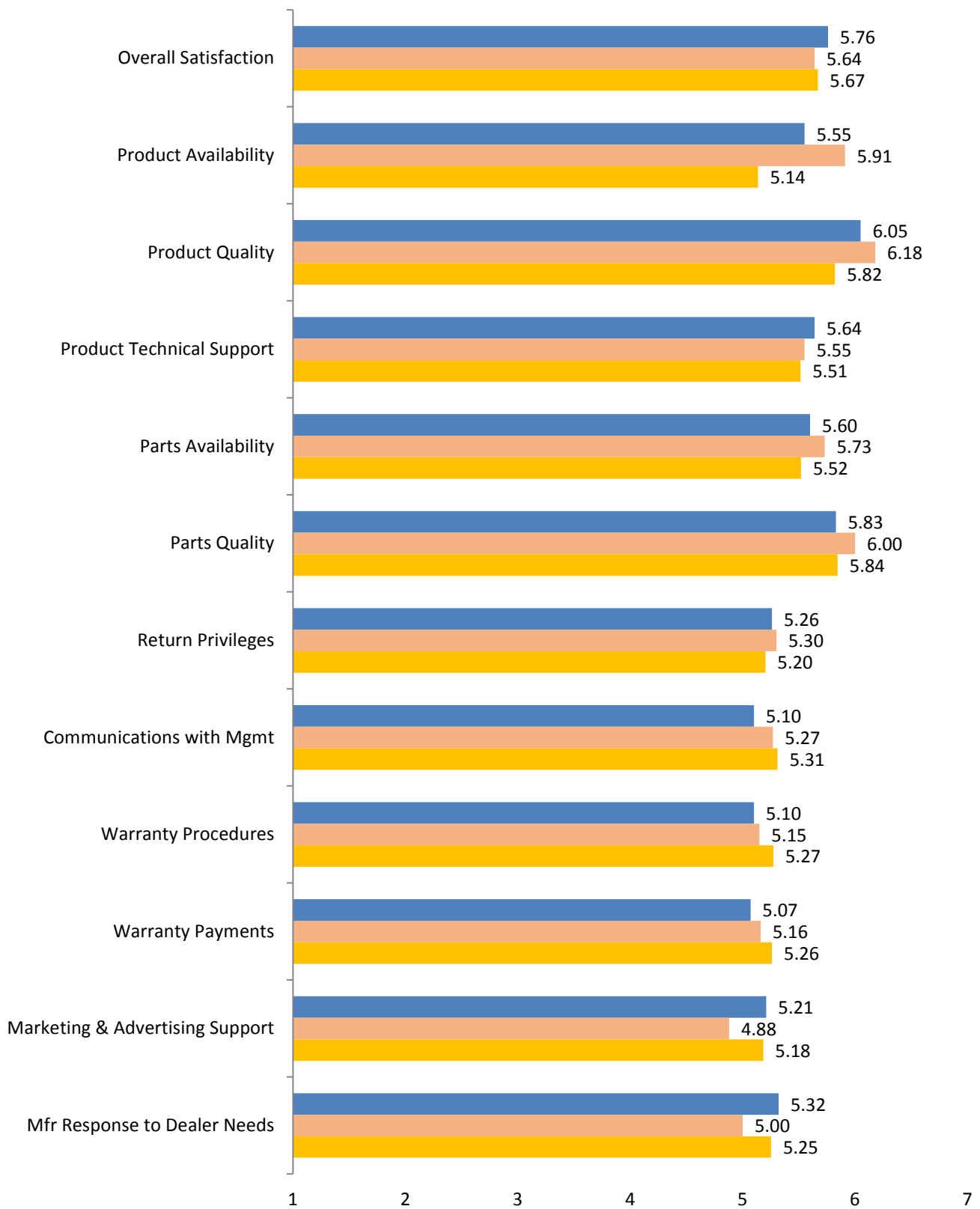
Bush Hog

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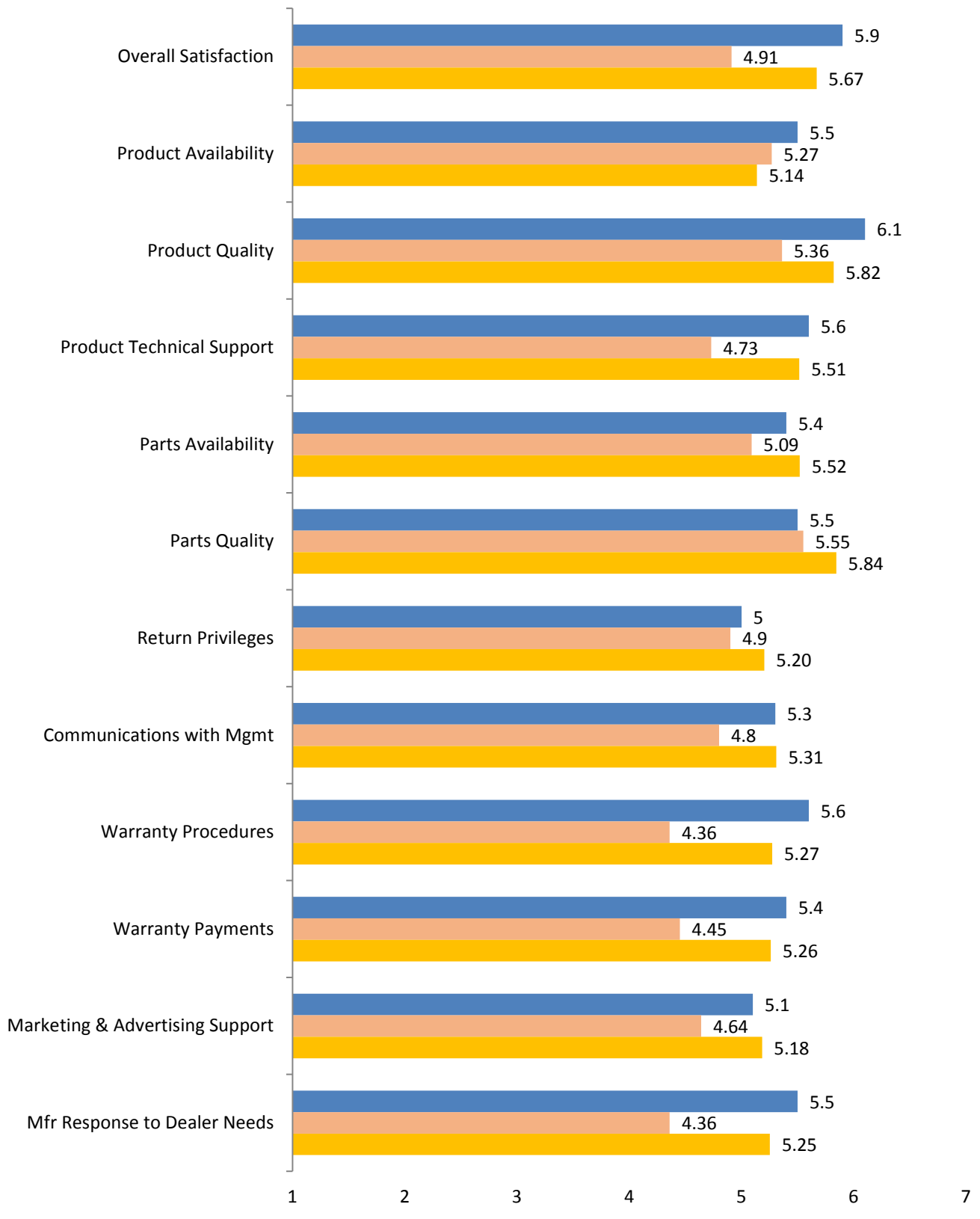
Degelman

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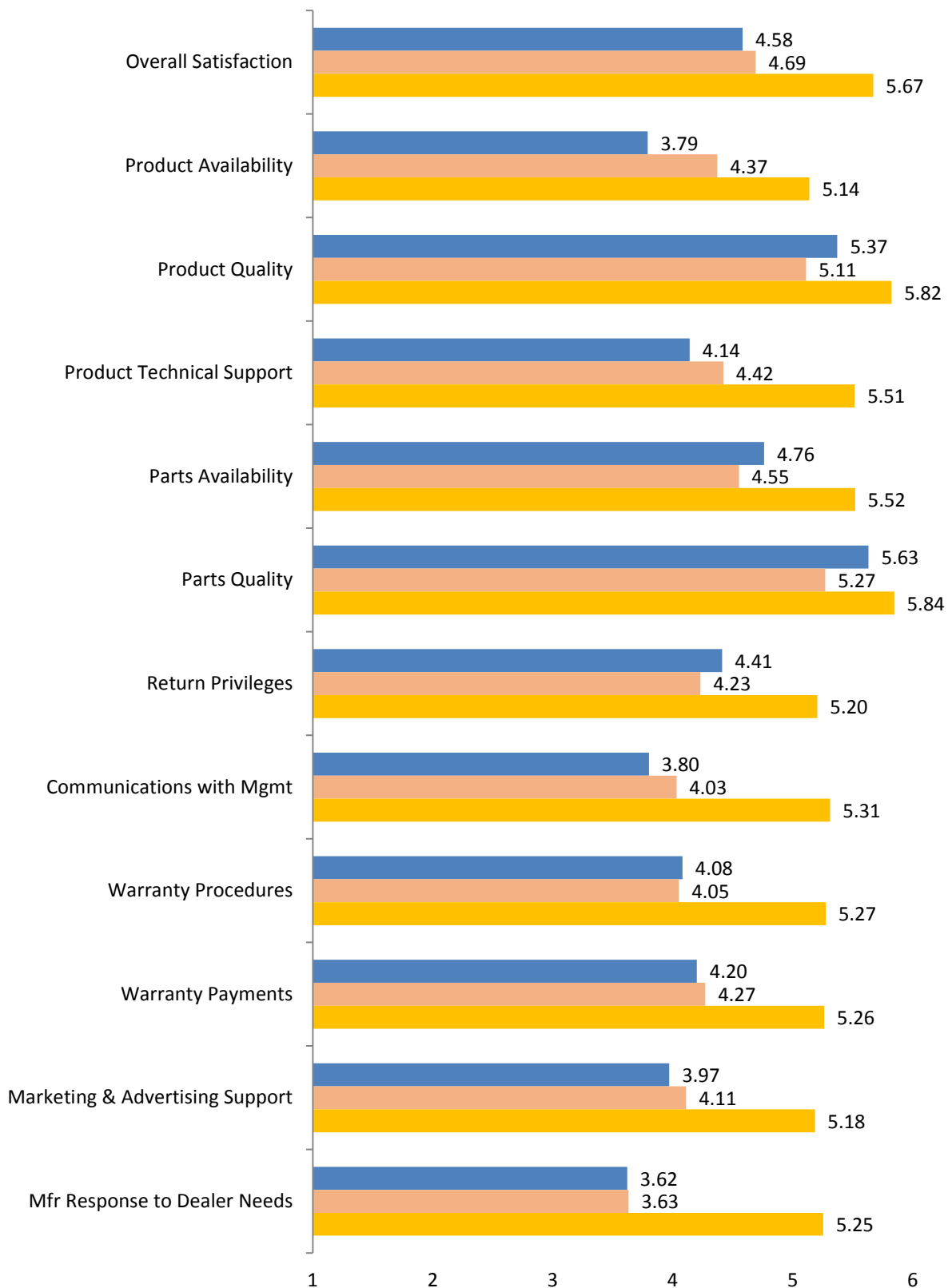
Elmer's Mfg.

■ 2021 Rating ■ 2020 Rating ■ All Shortline Mfr Rating 2021



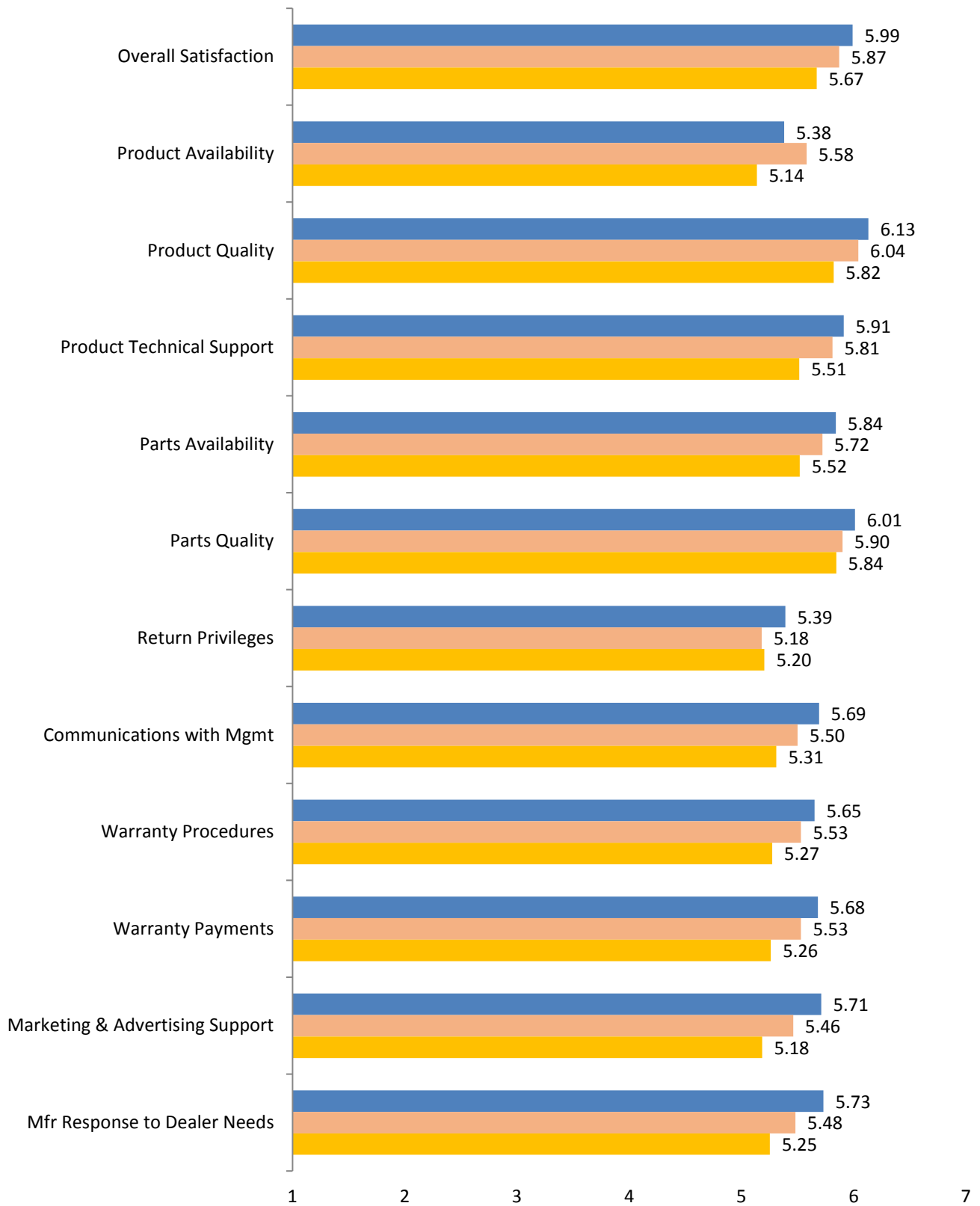
Gehl

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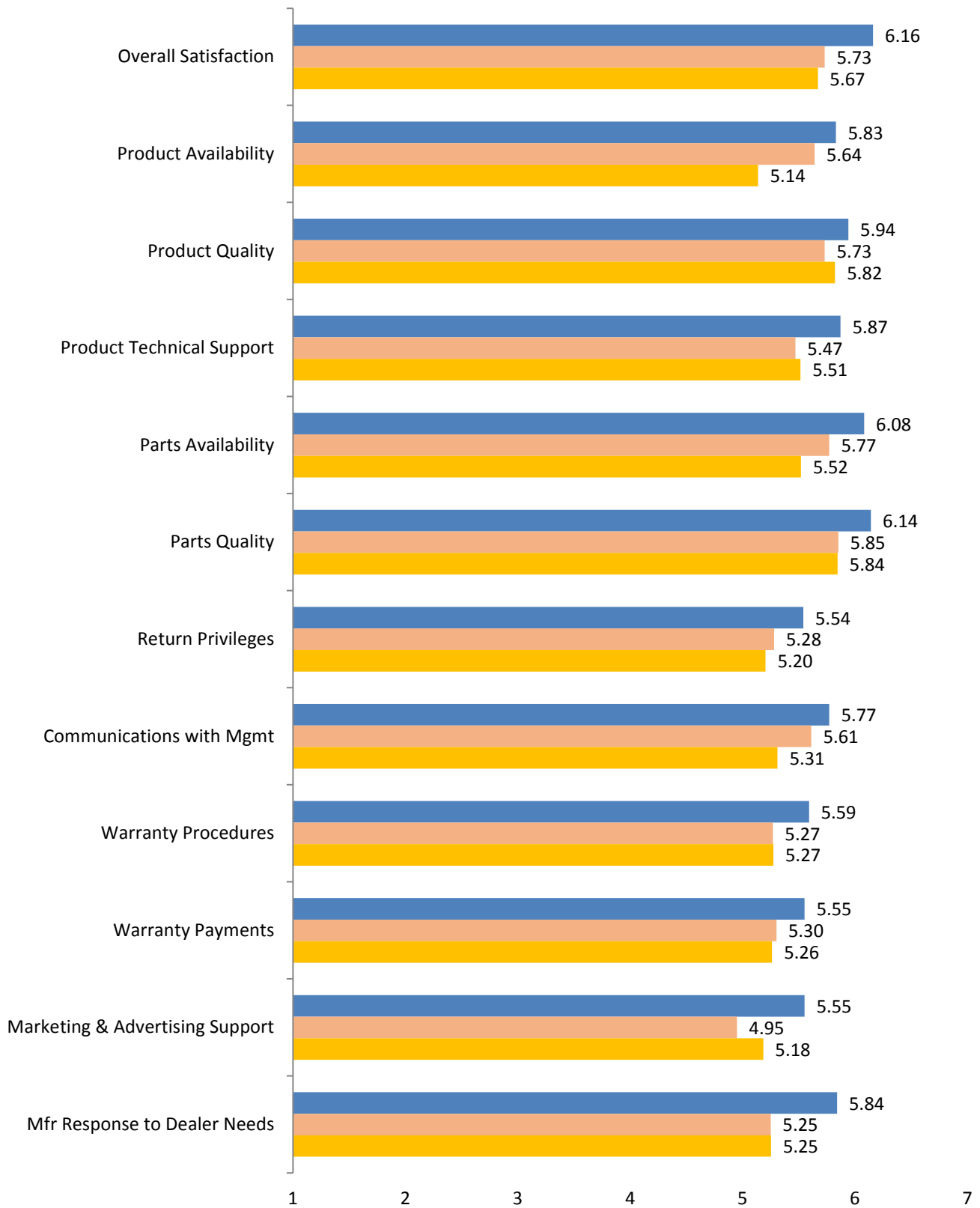
Great Plains

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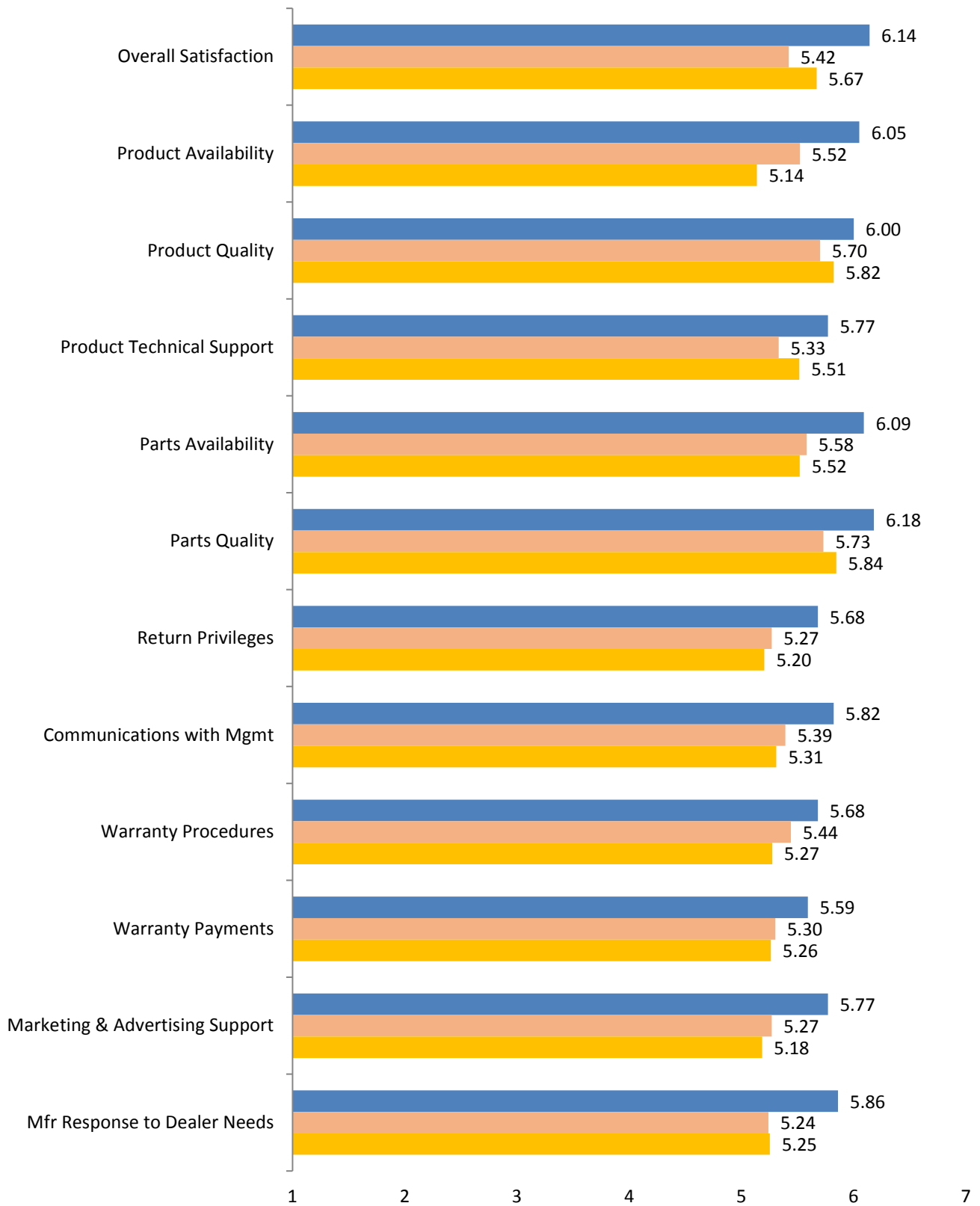
H & S Mfg.

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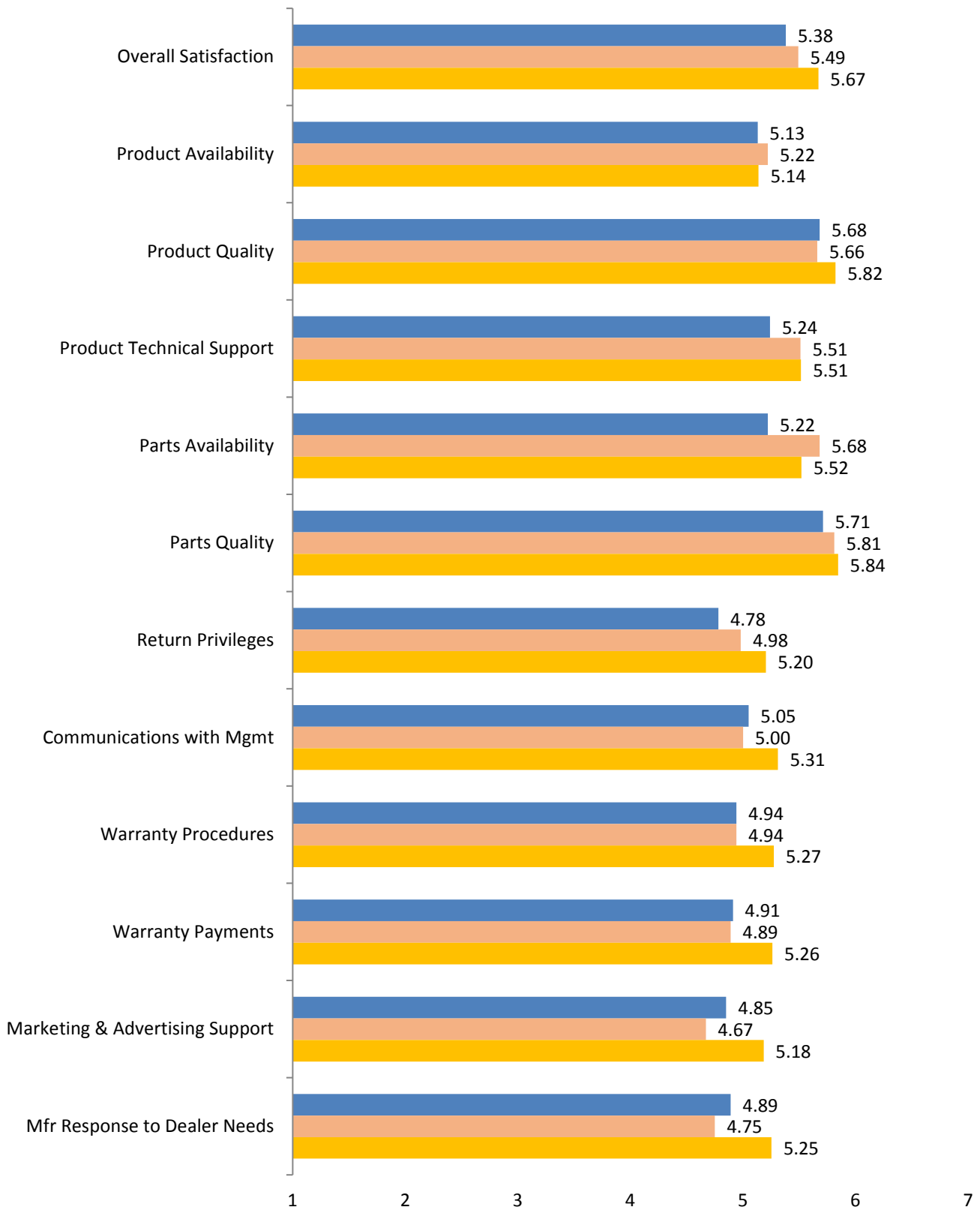
Highline Mfg.

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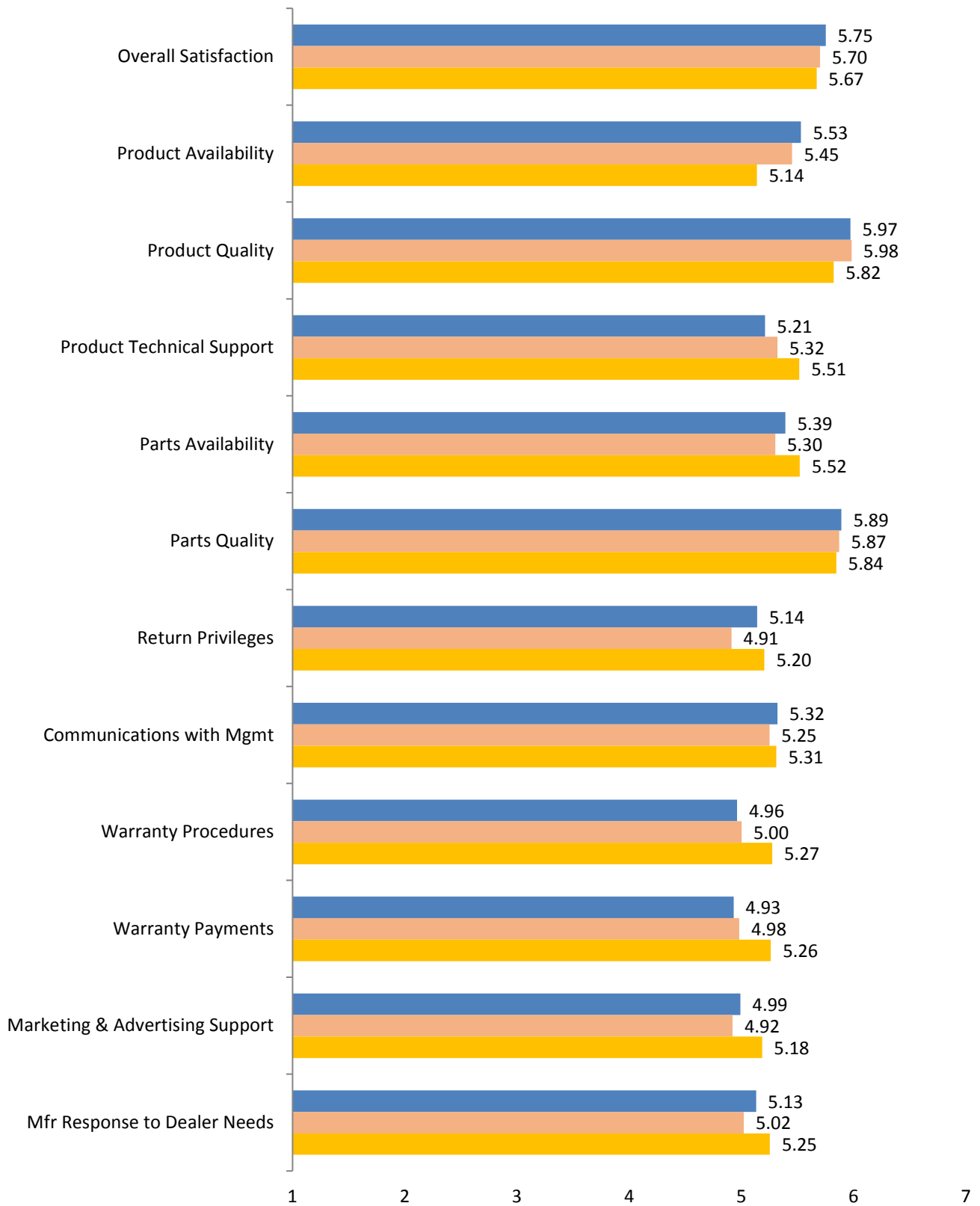
Kinze

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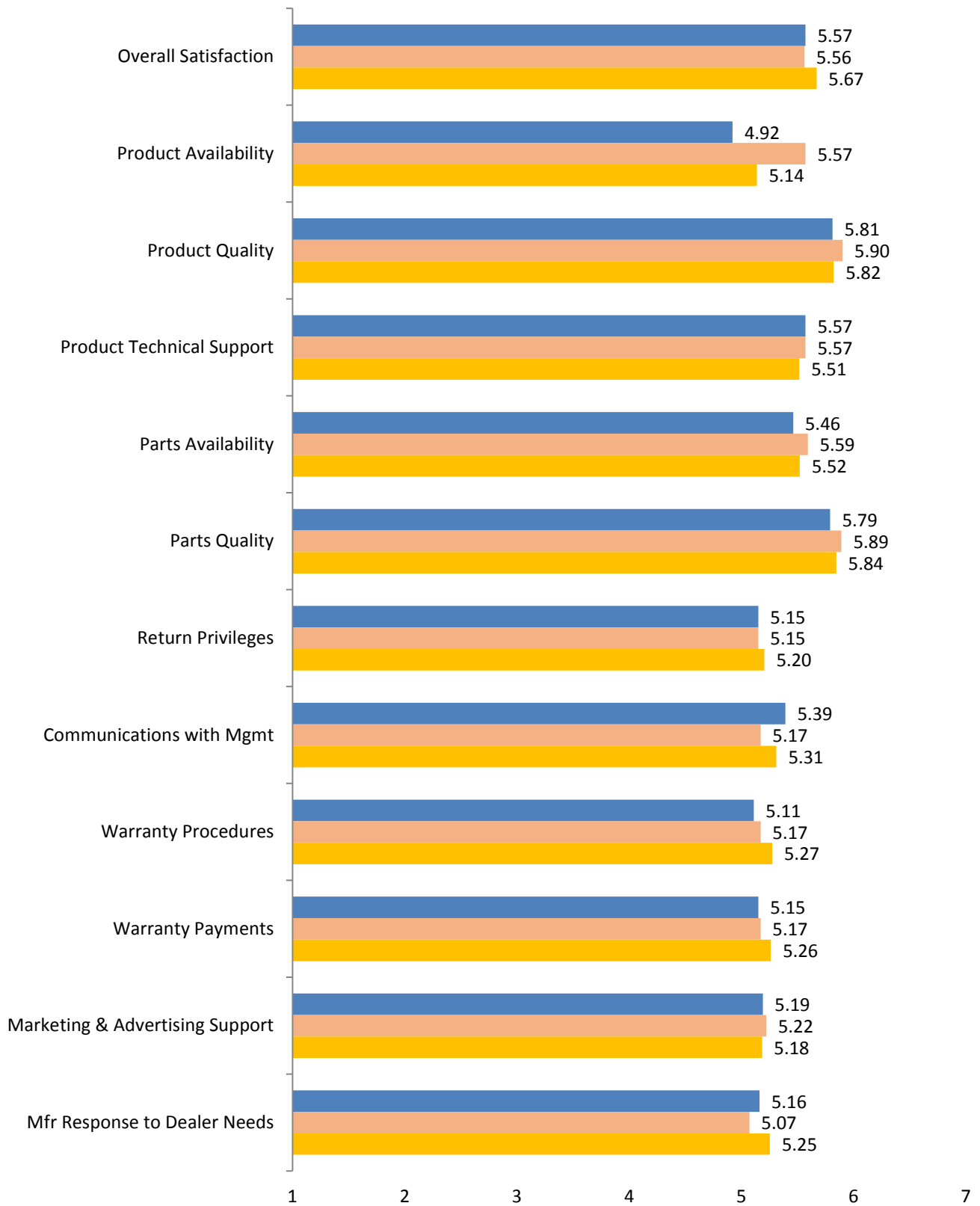
Krone NA

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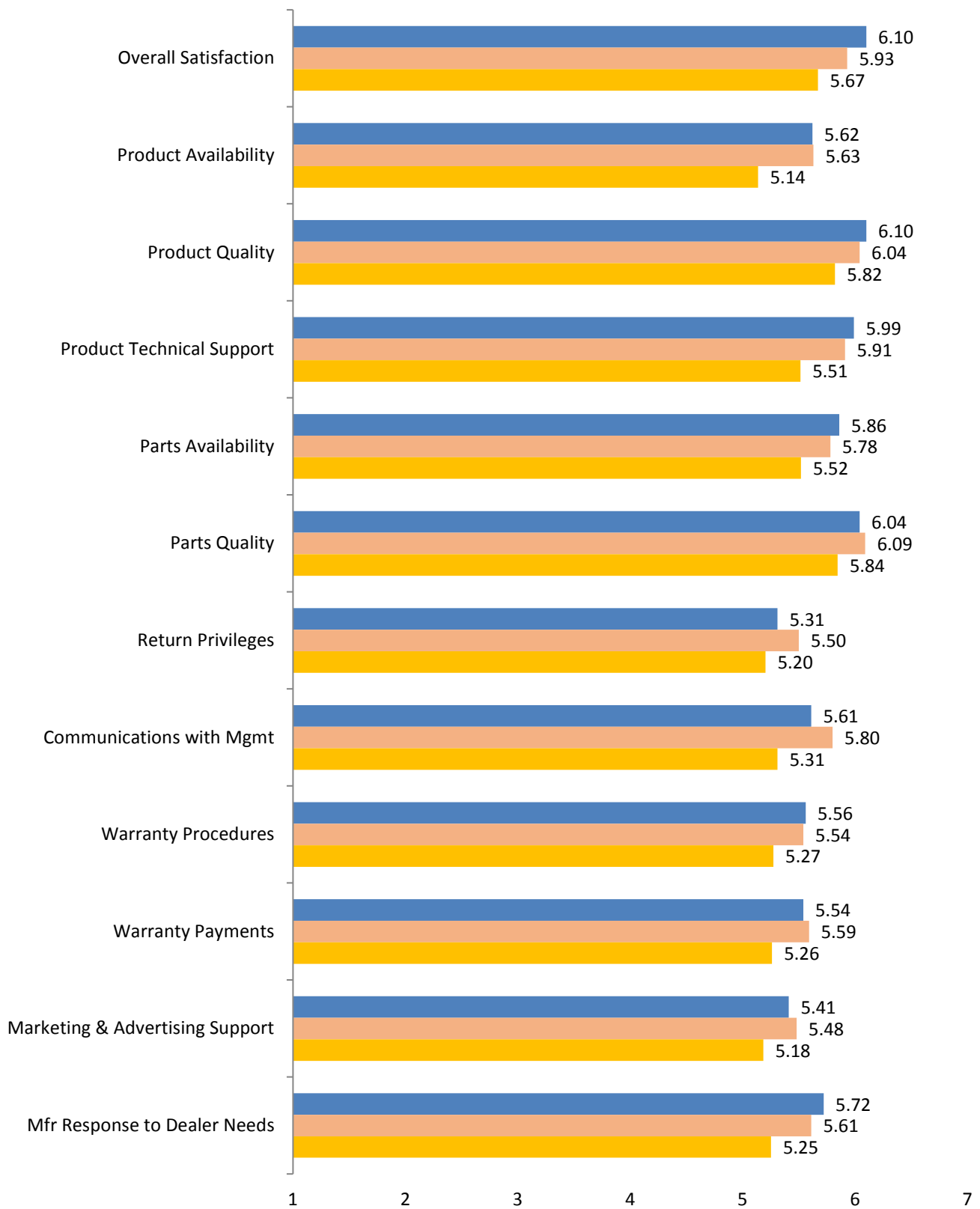
Kuhn NA

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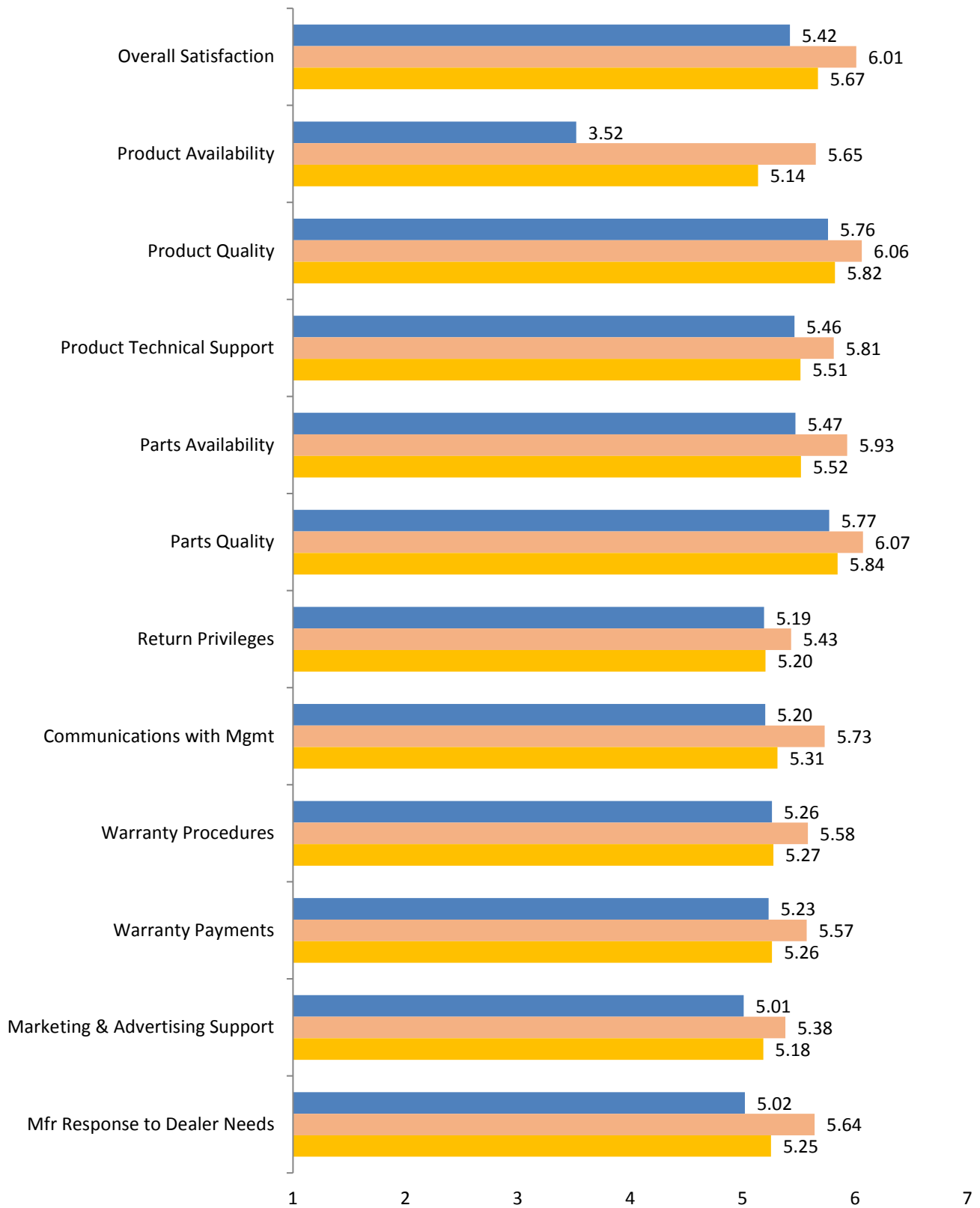
Landoll

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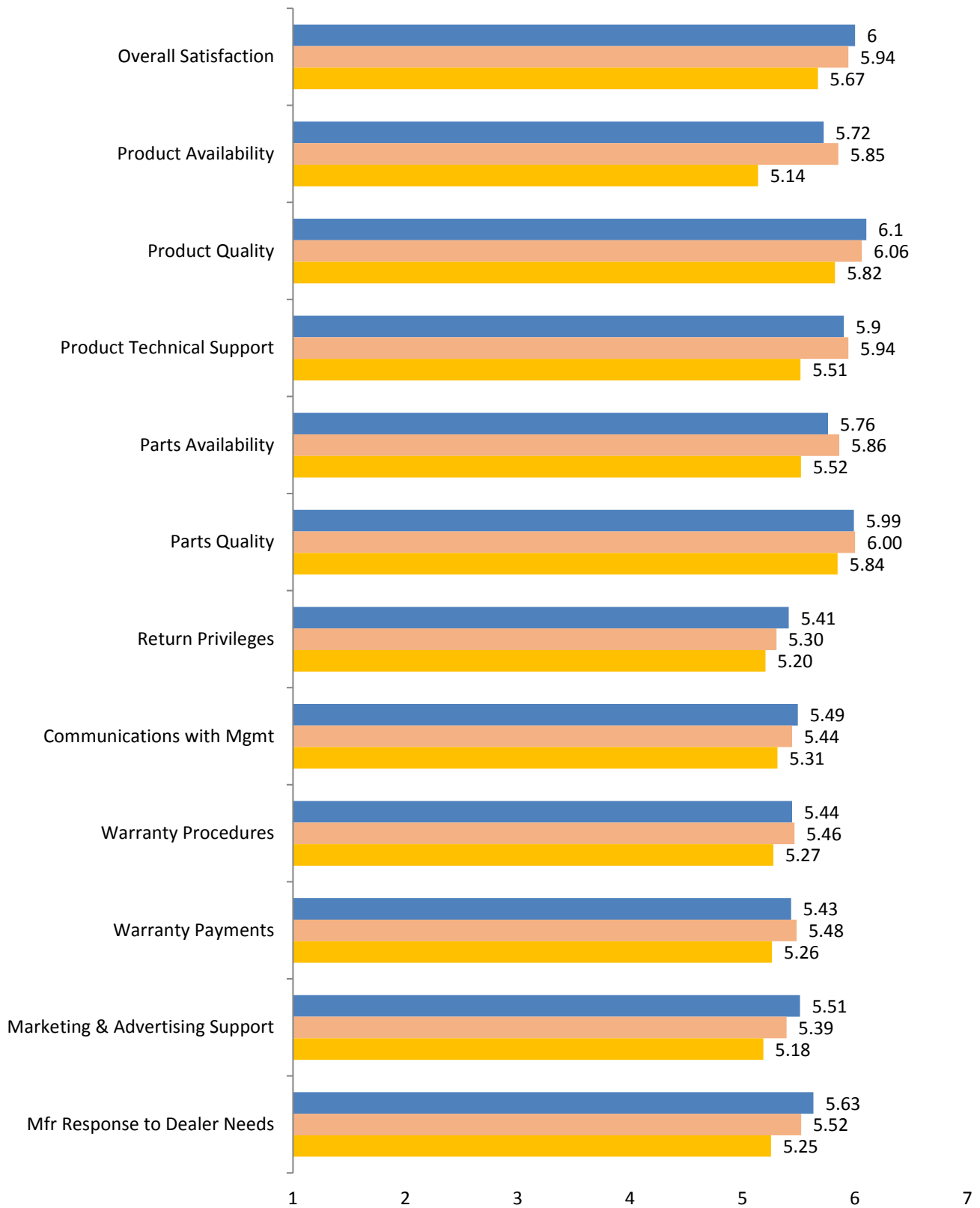
Land Pride

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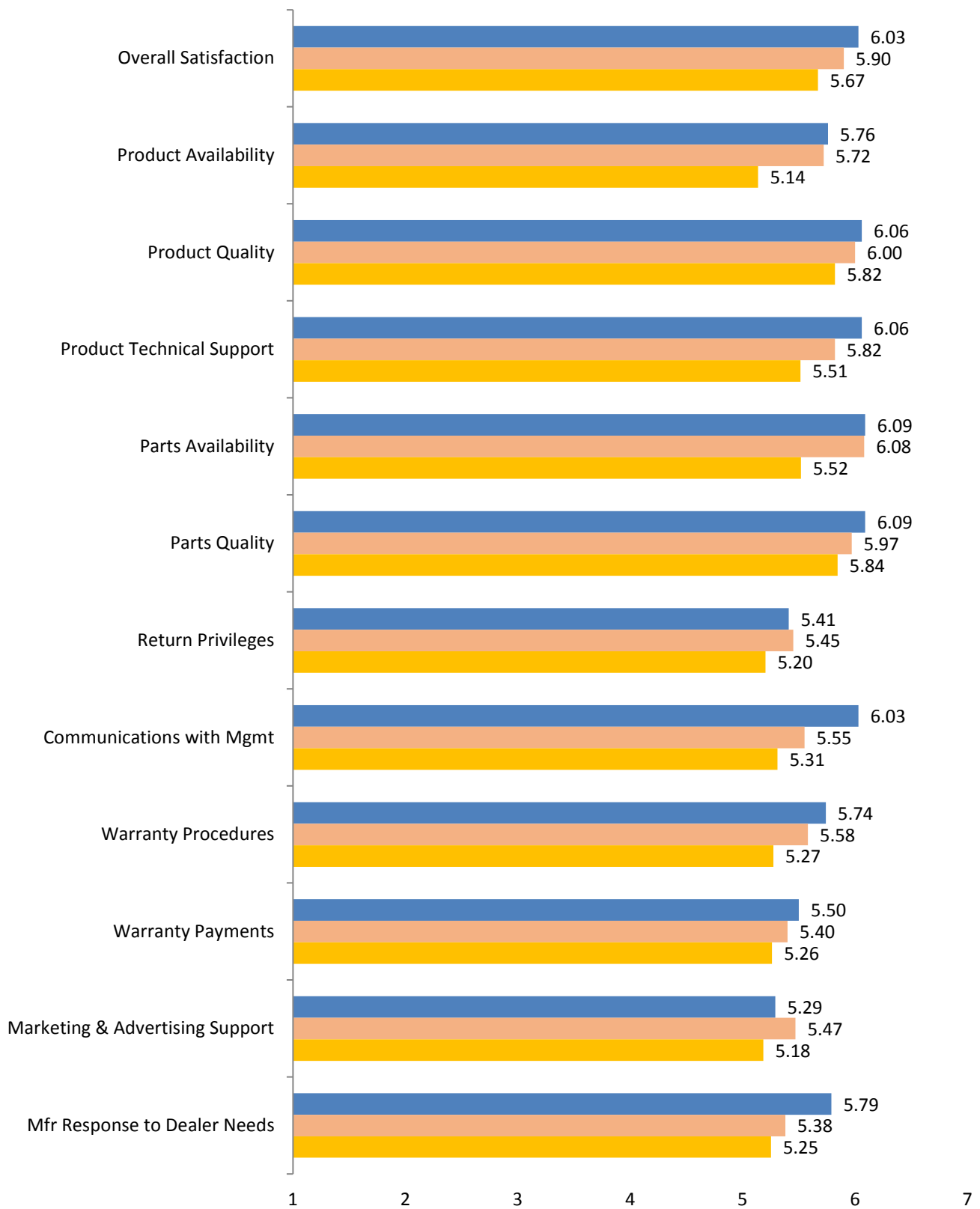
MacDon

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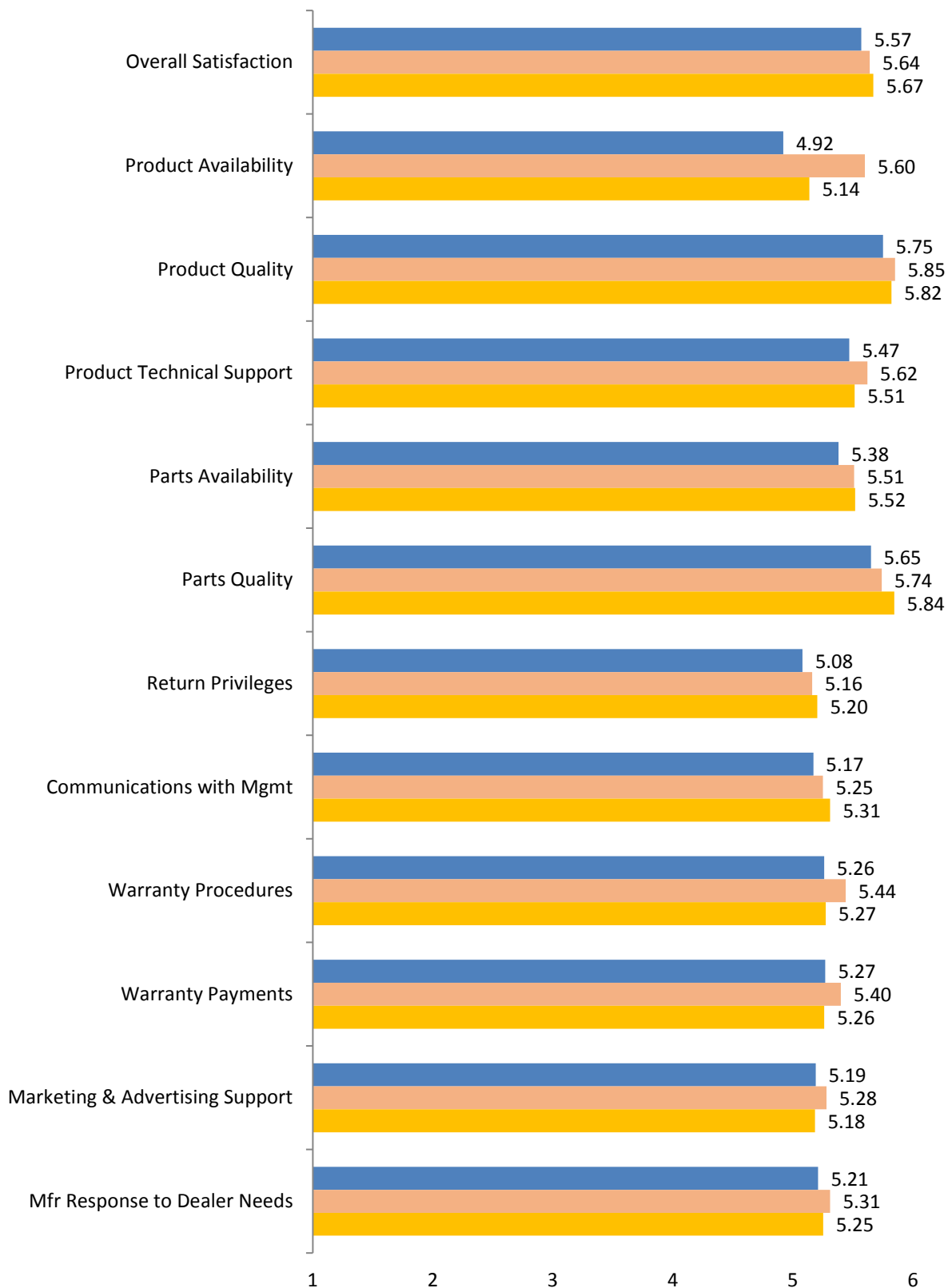
Meyer Mfg.

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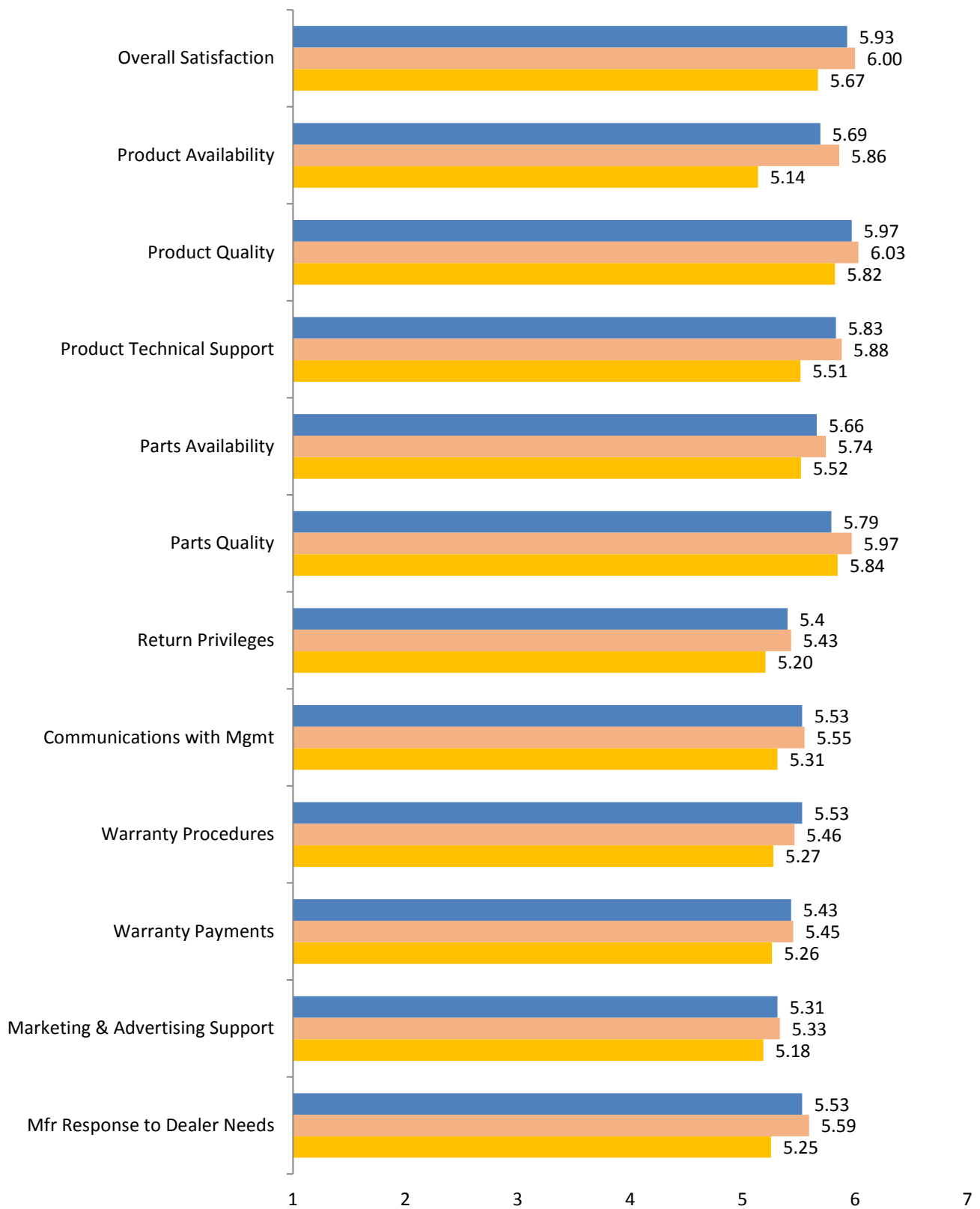
RhinoAG

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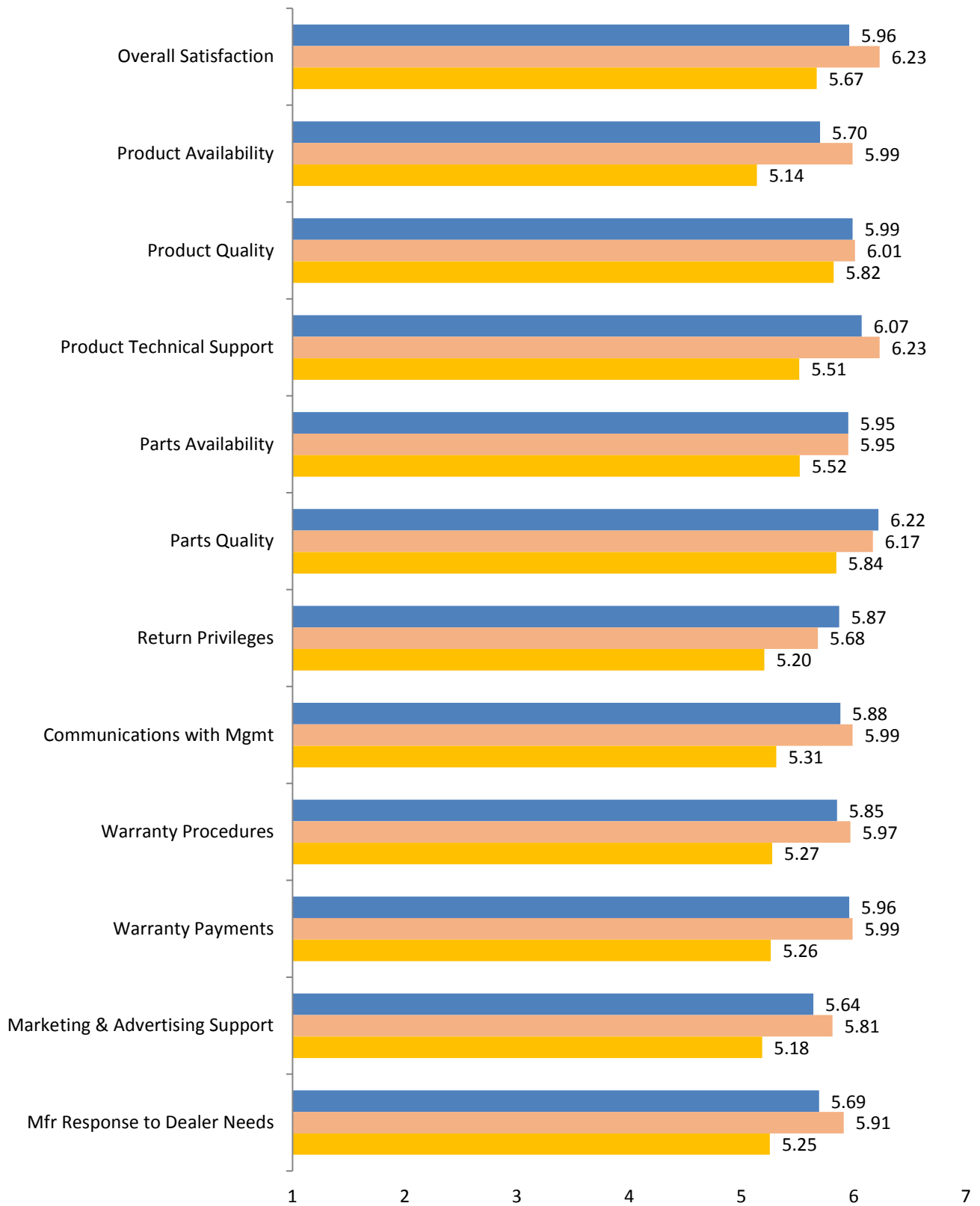
Unverferth

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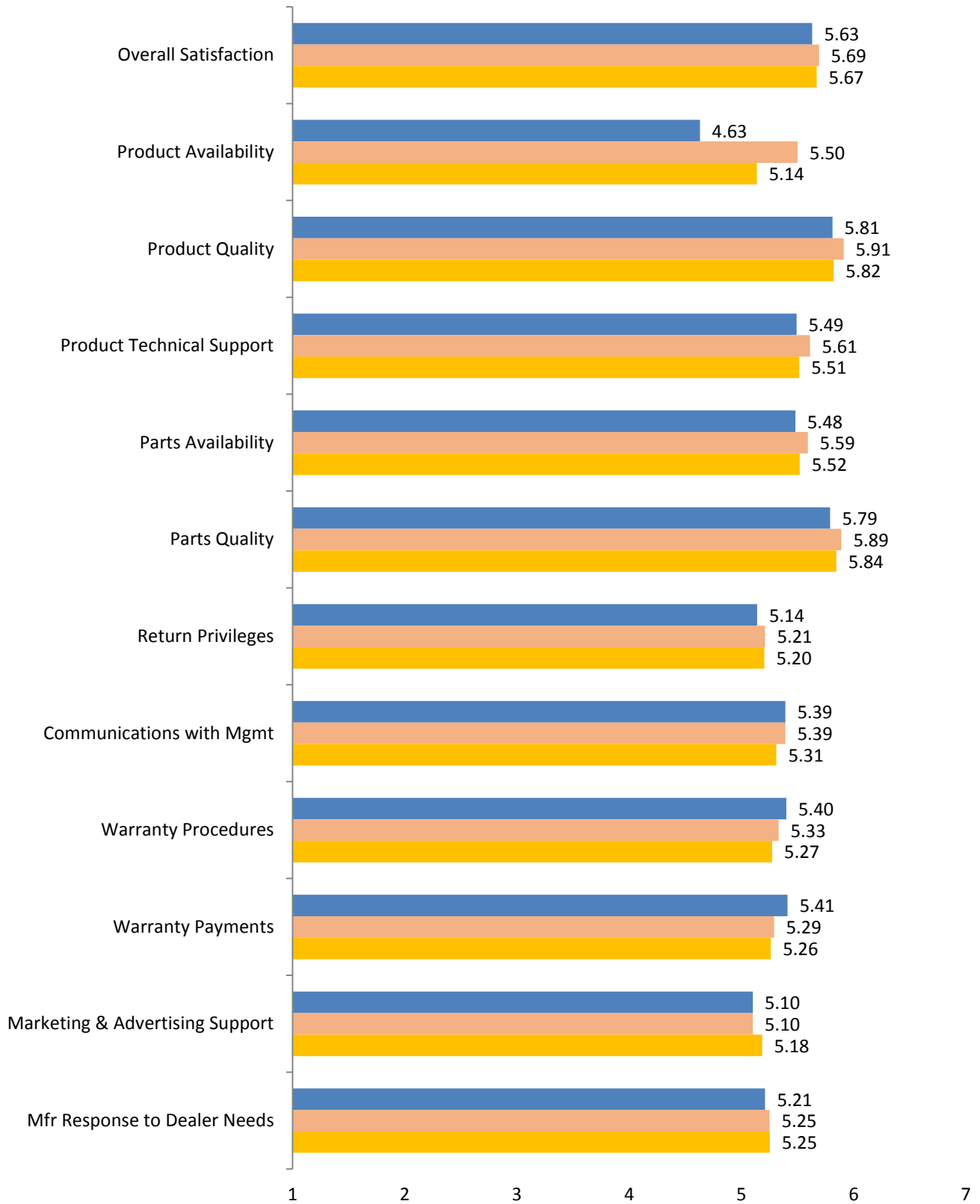
Vermeer

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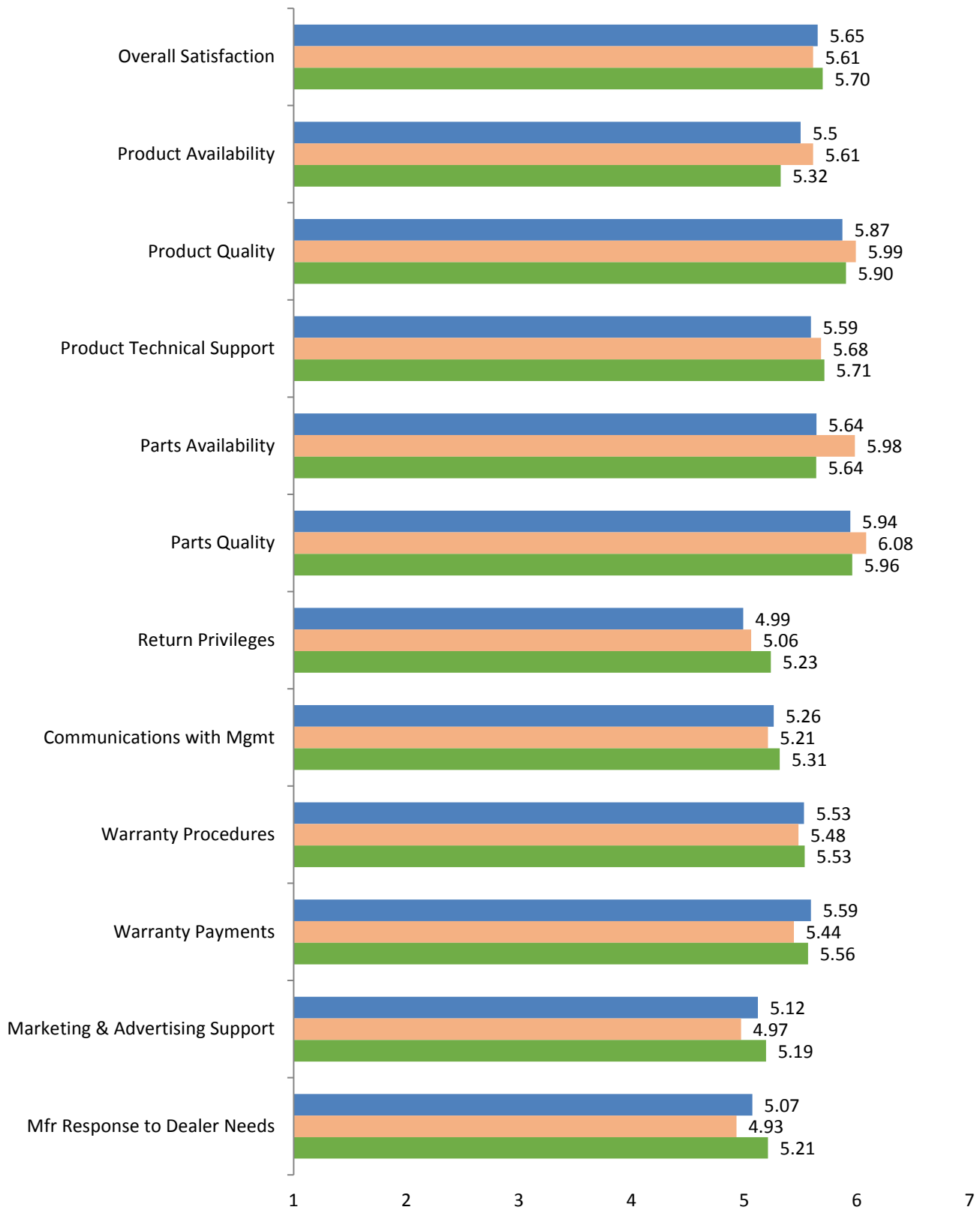
Woods

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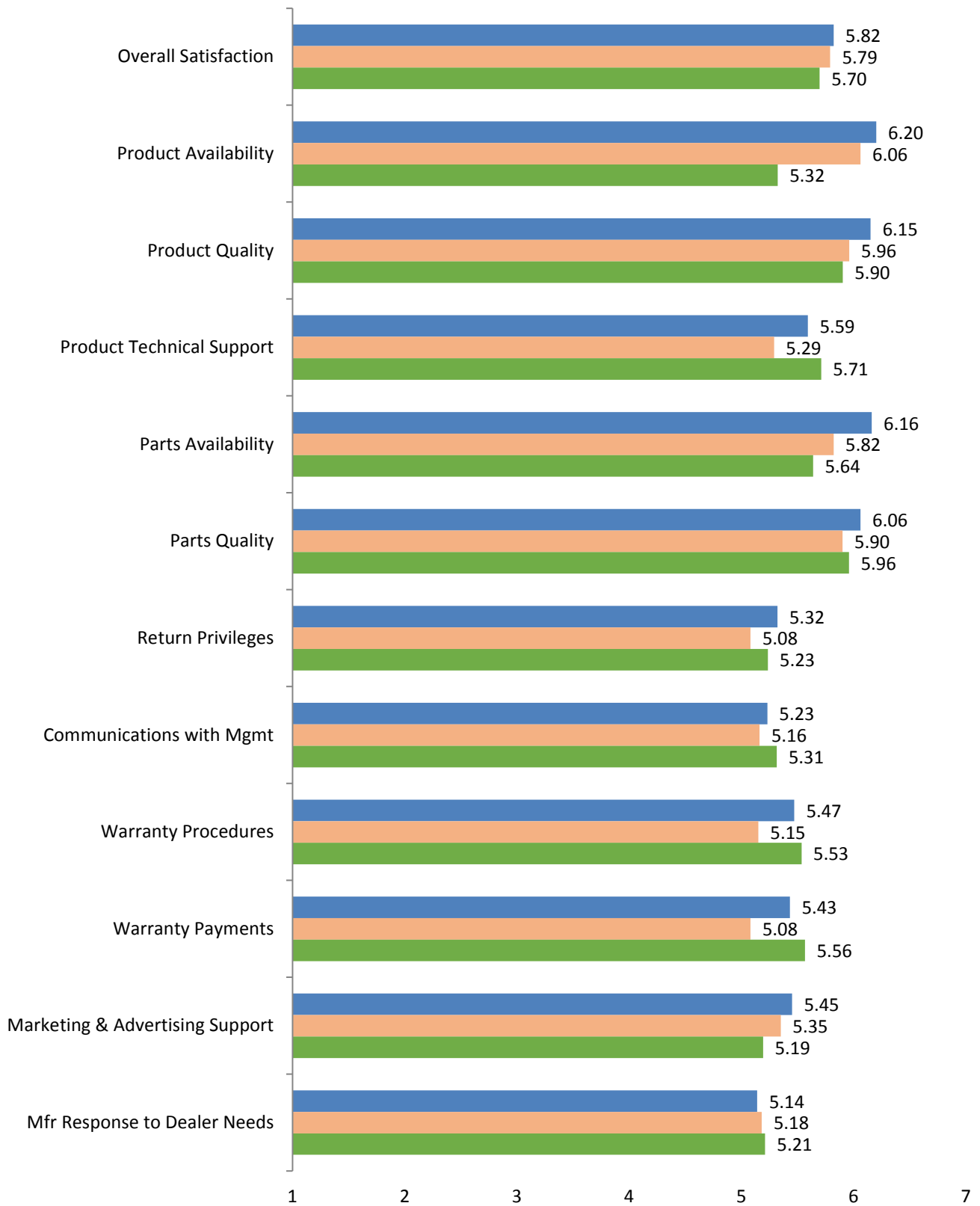
Ariens

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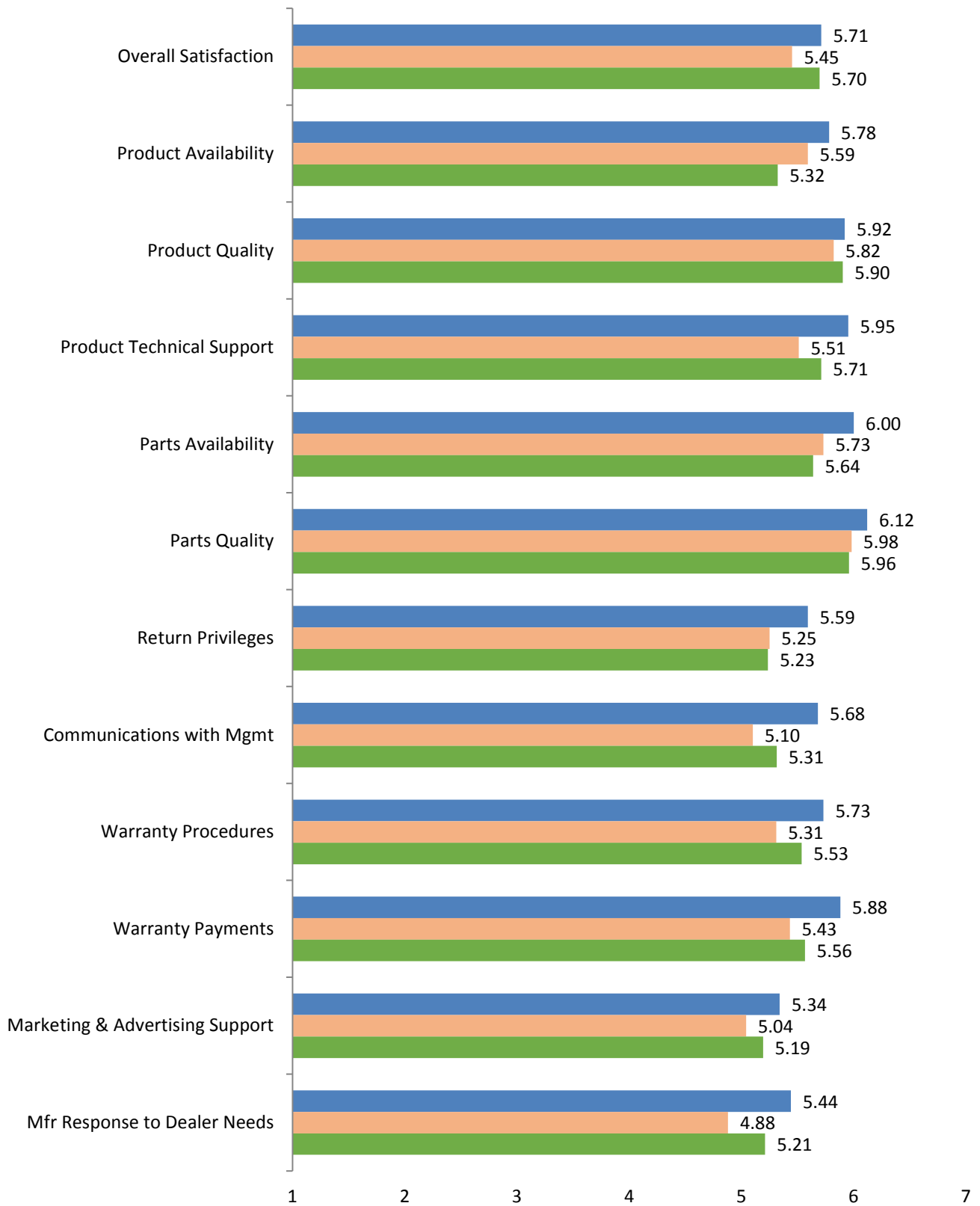
Bad Boy

2021 Rating 2020 Rating All OPE Mfr Rating 2021



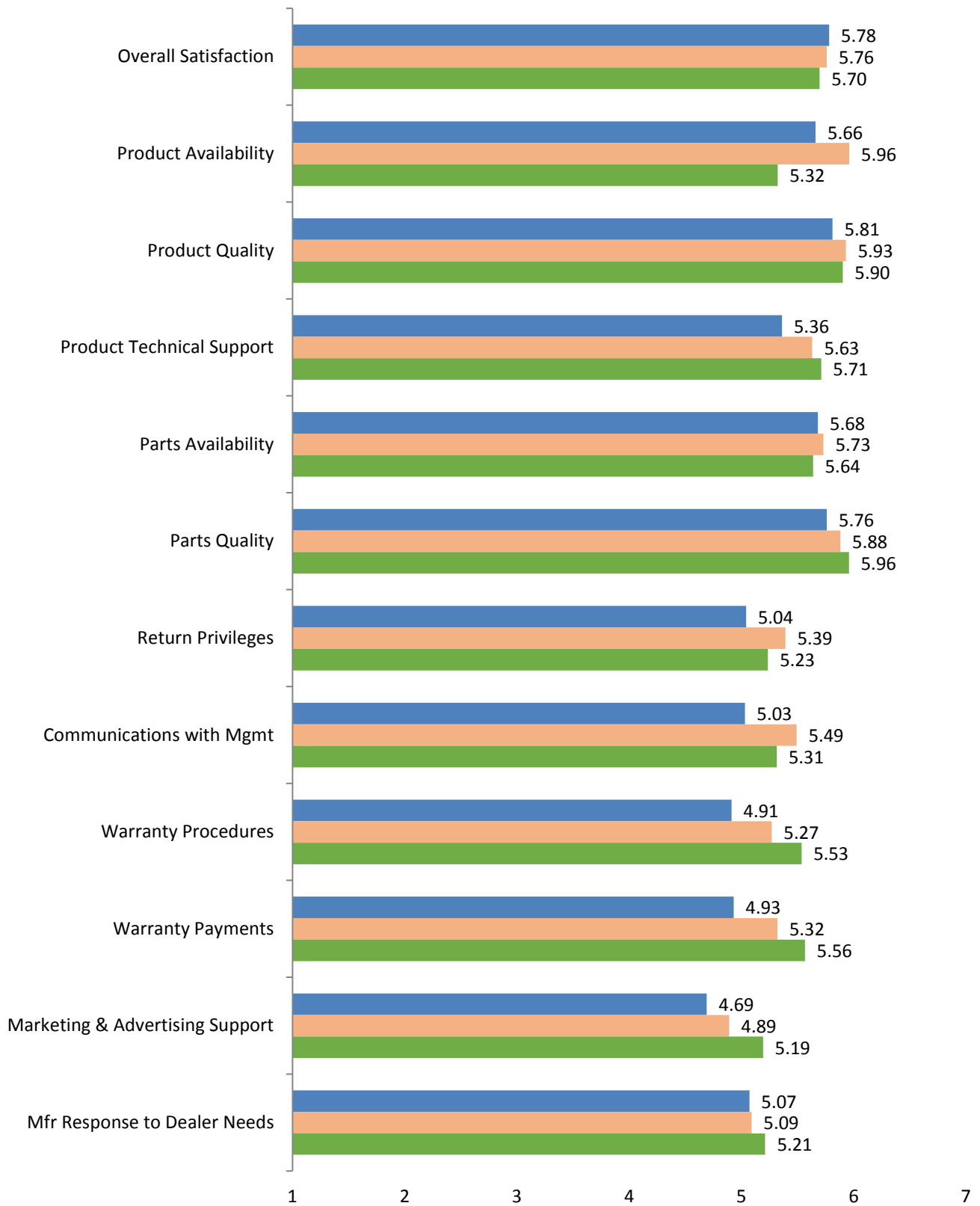
Big Dog

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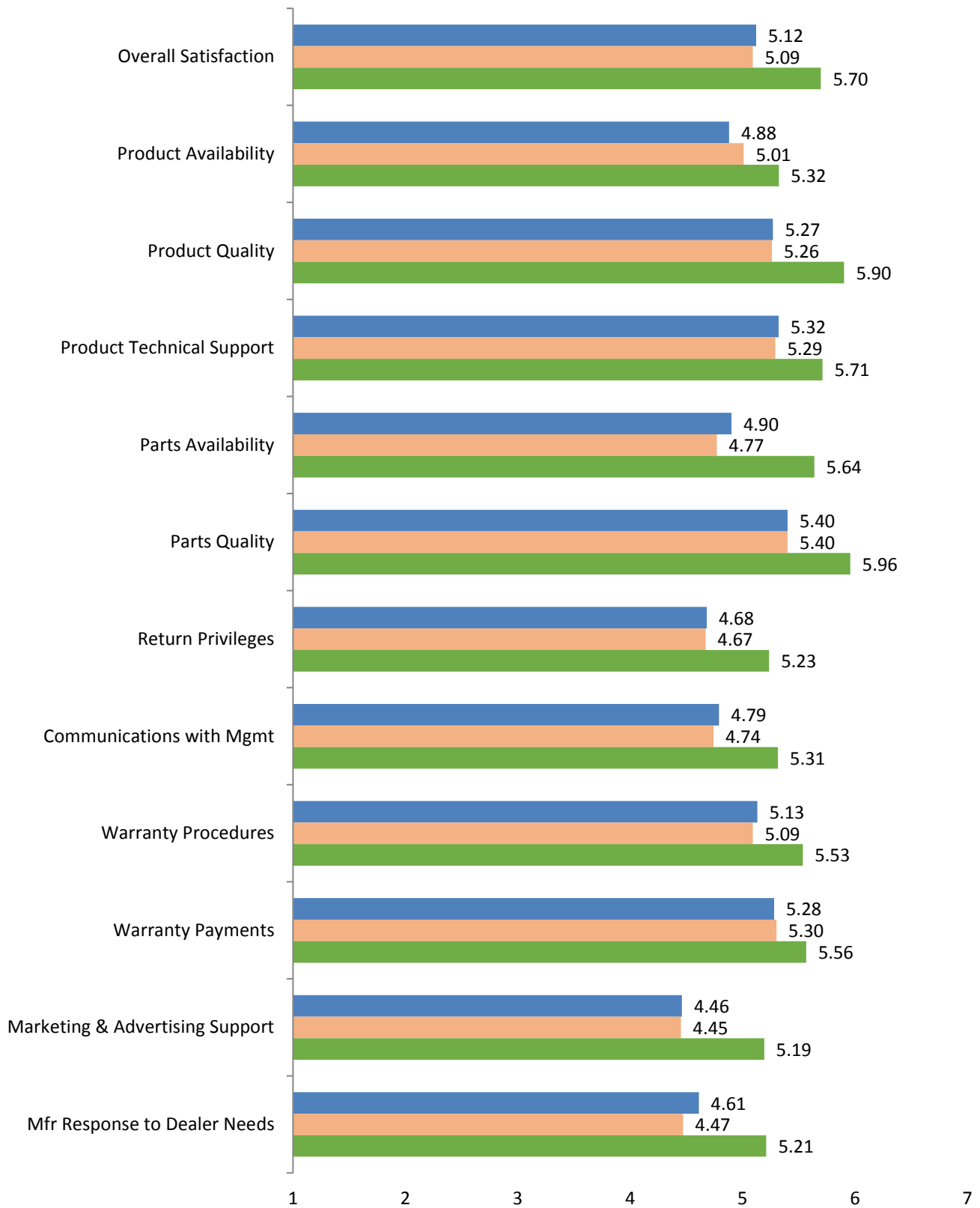
Billy Goat

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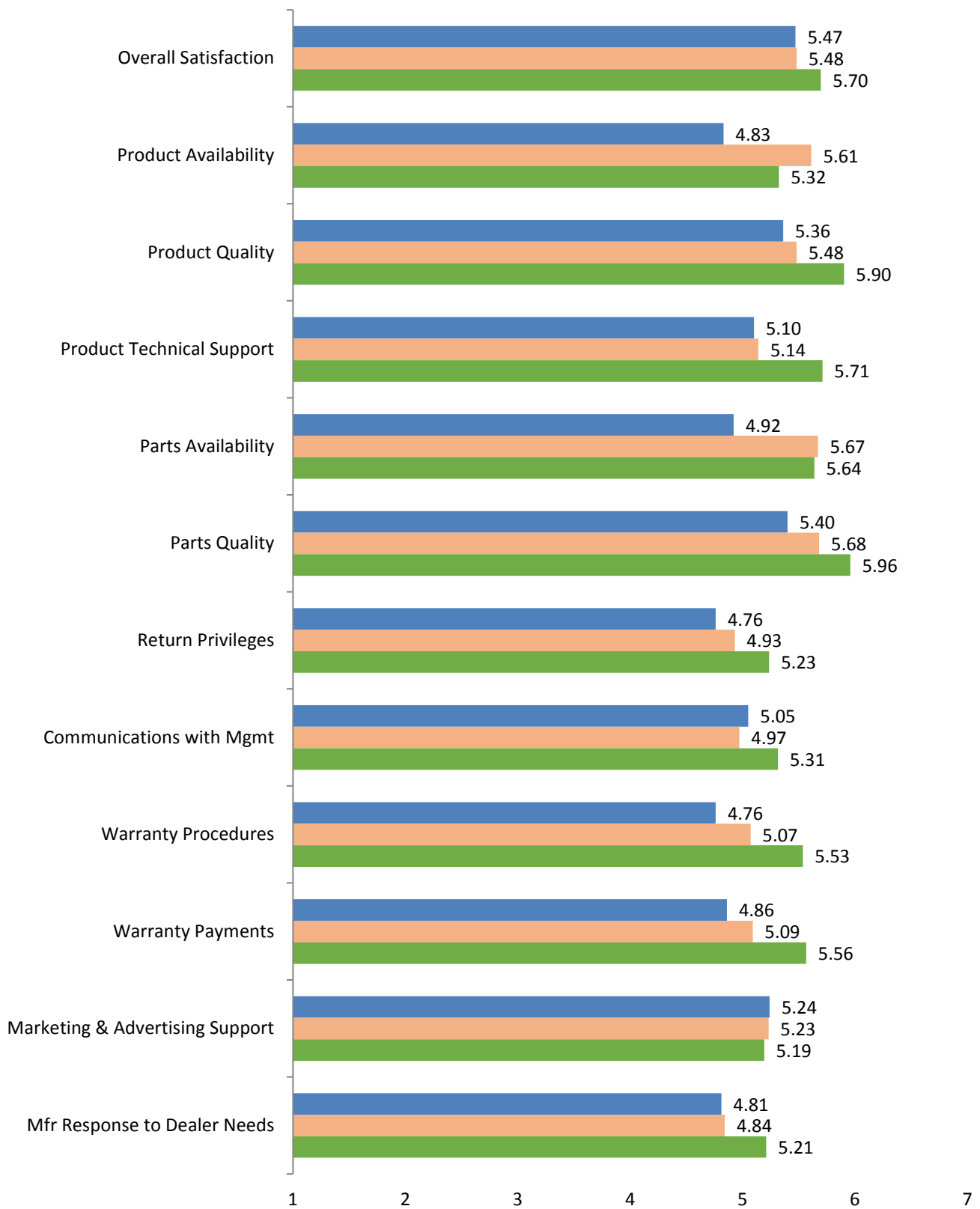
Briggs & Stratton

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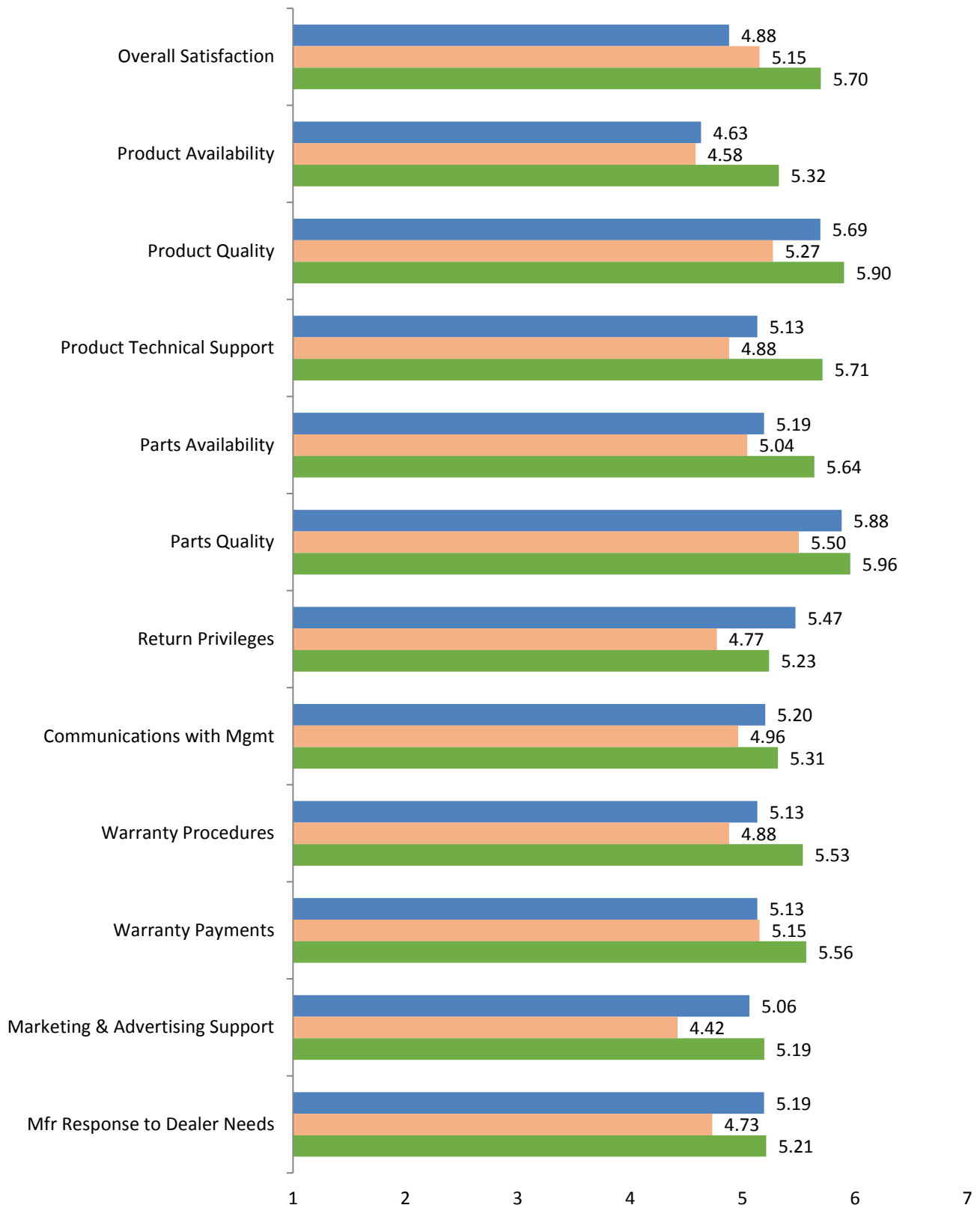
Cub Cadet

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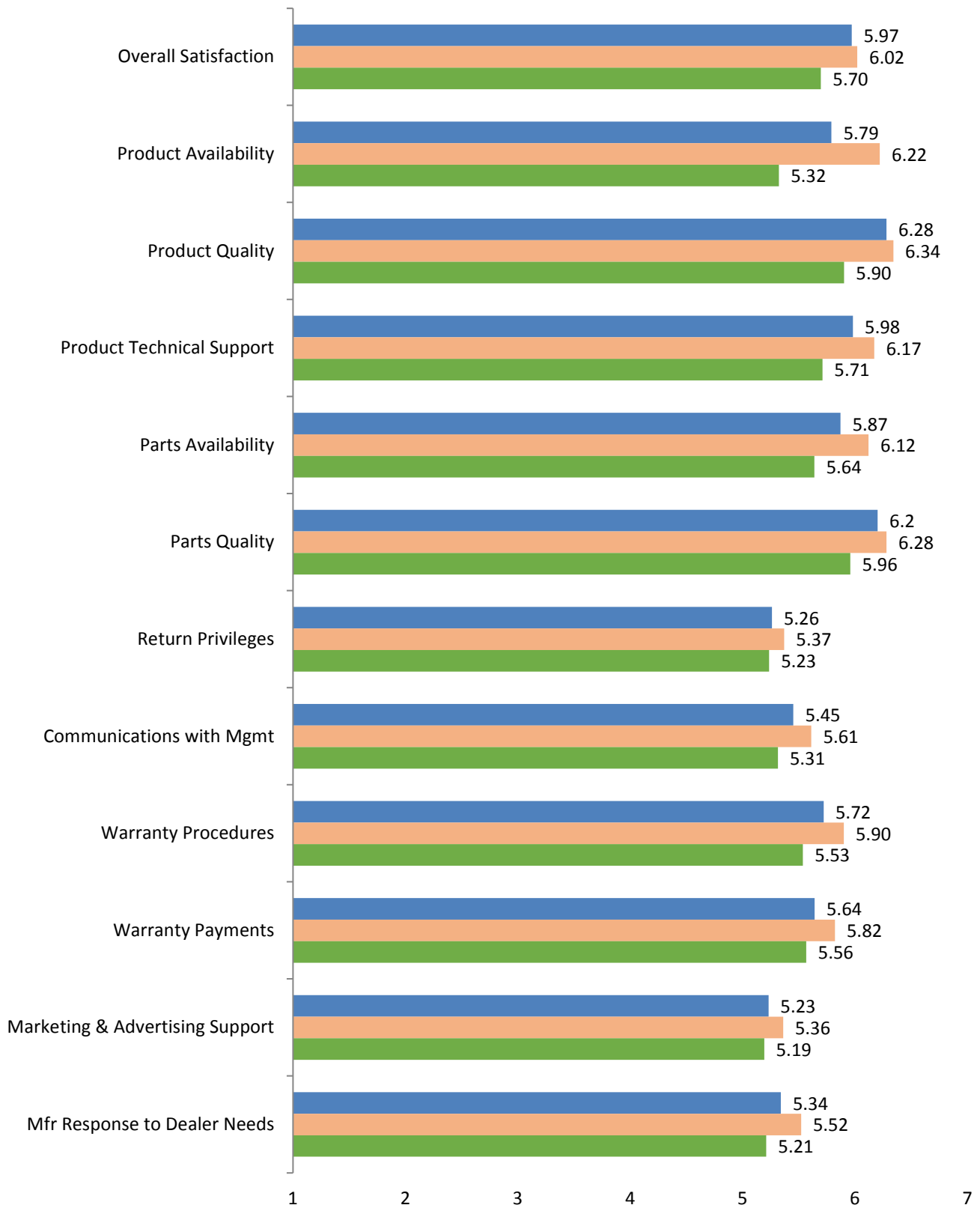
Dixie Chopper

2021 Rating 2020 Rating All OPE Mfr Rating 2021



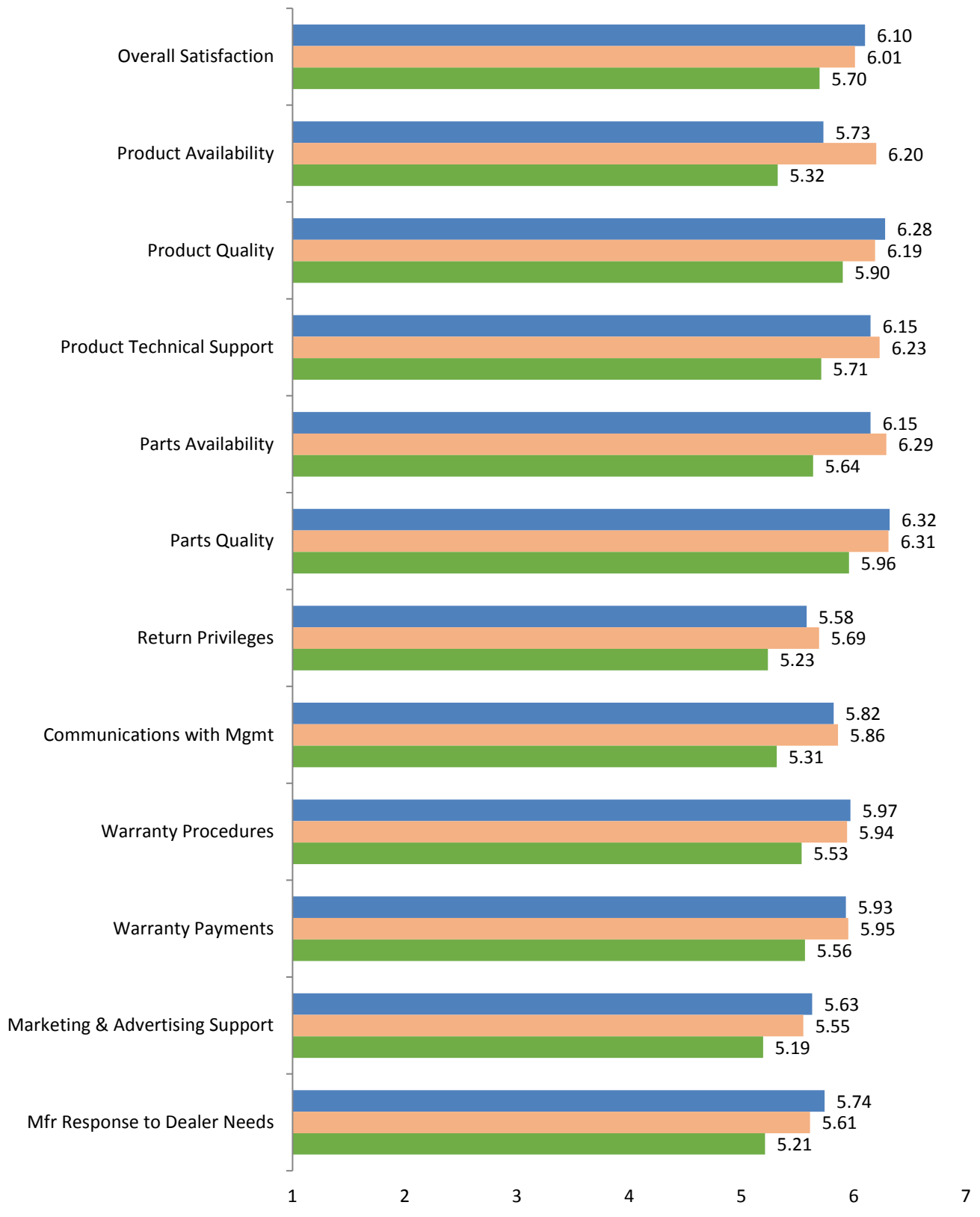
ECHO

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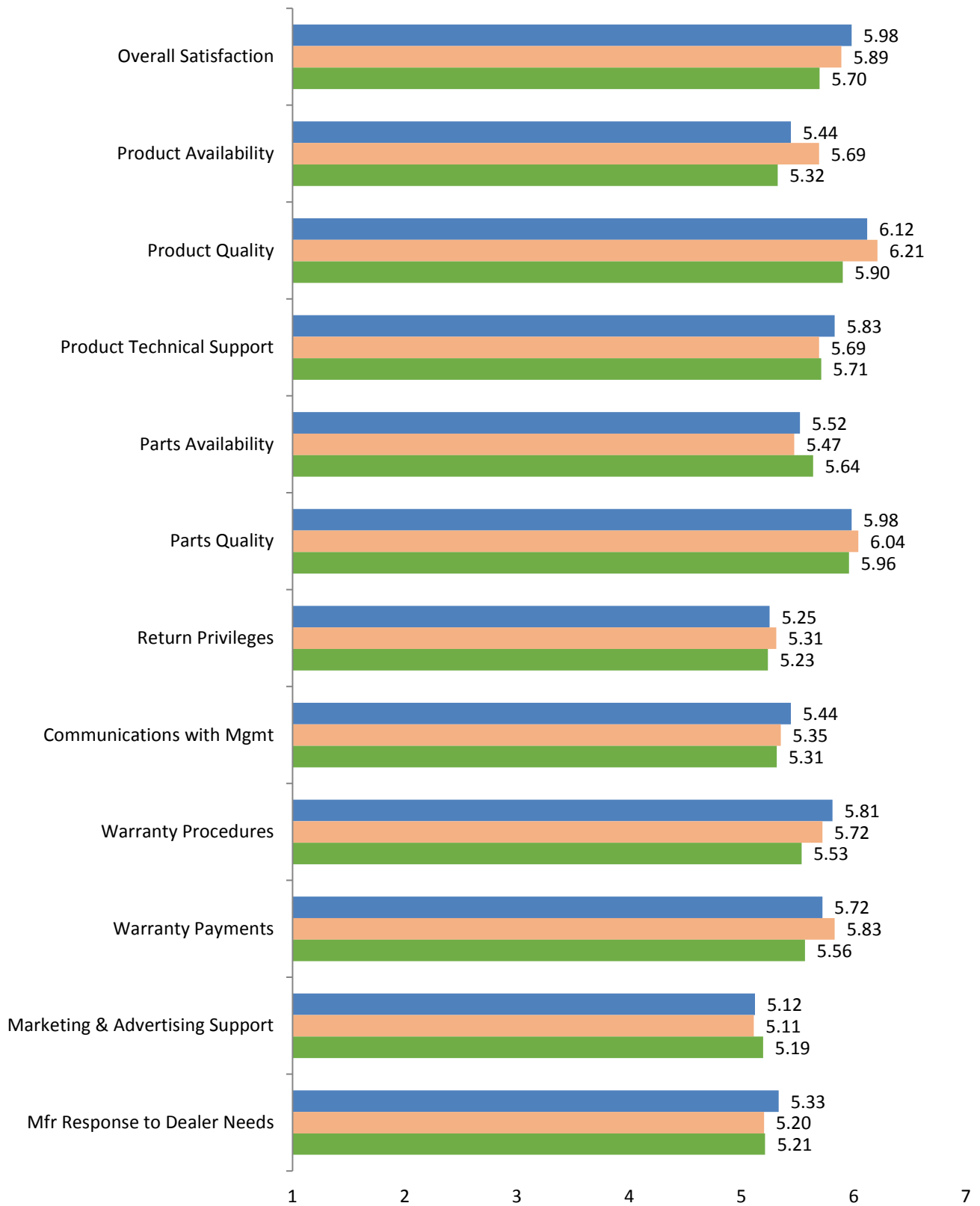
Exmark

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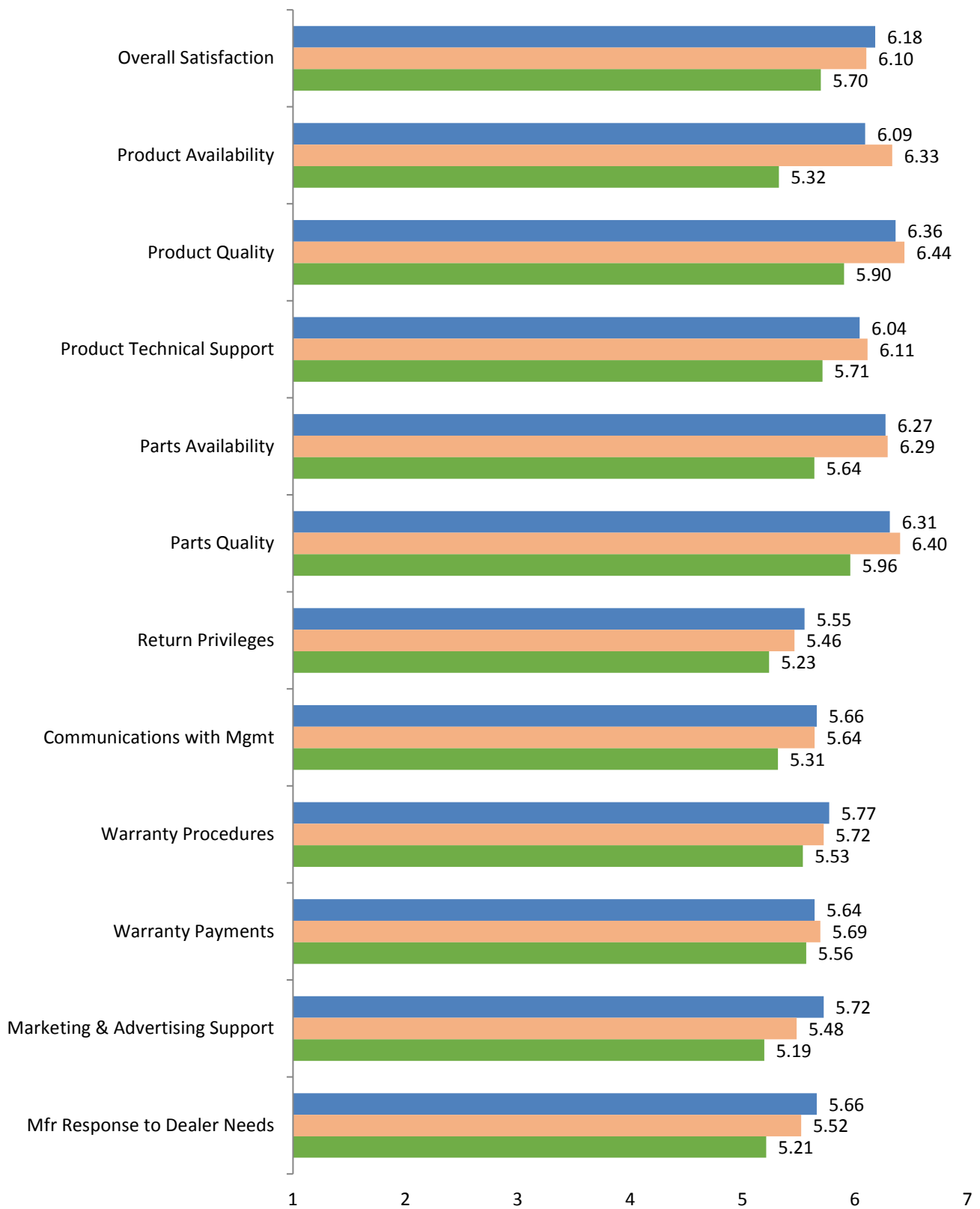
Ferris

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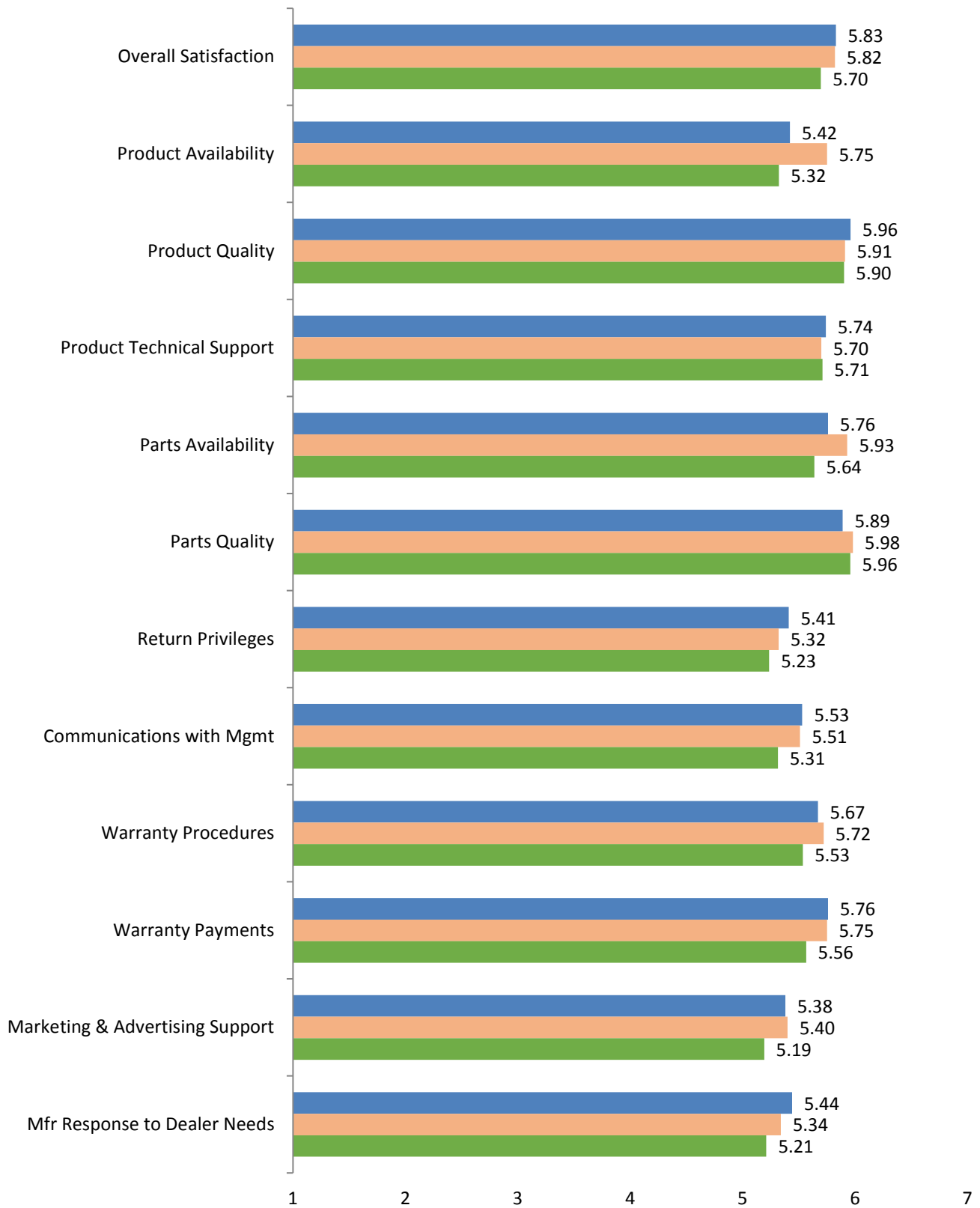
Grasshopper

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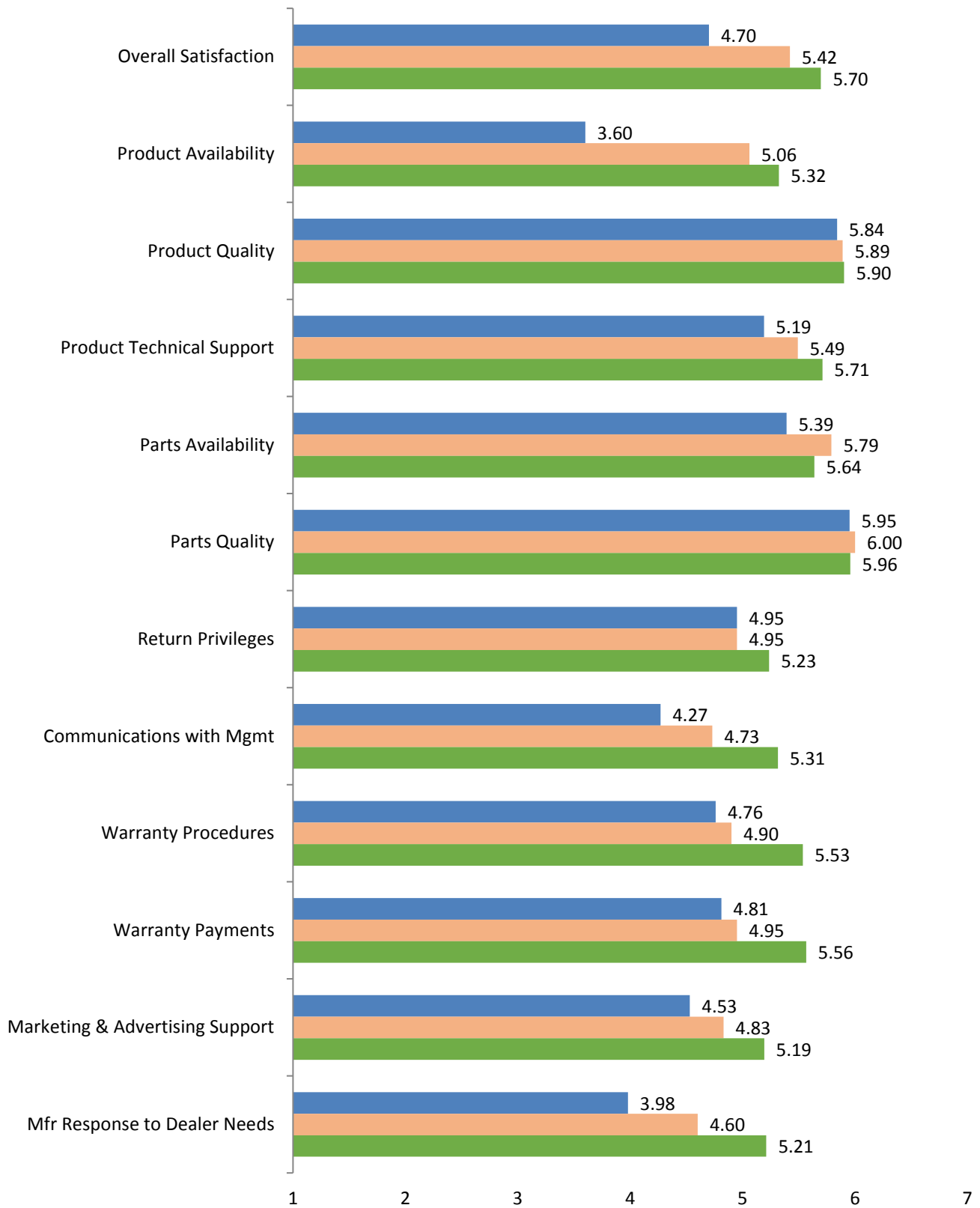
Gravelly

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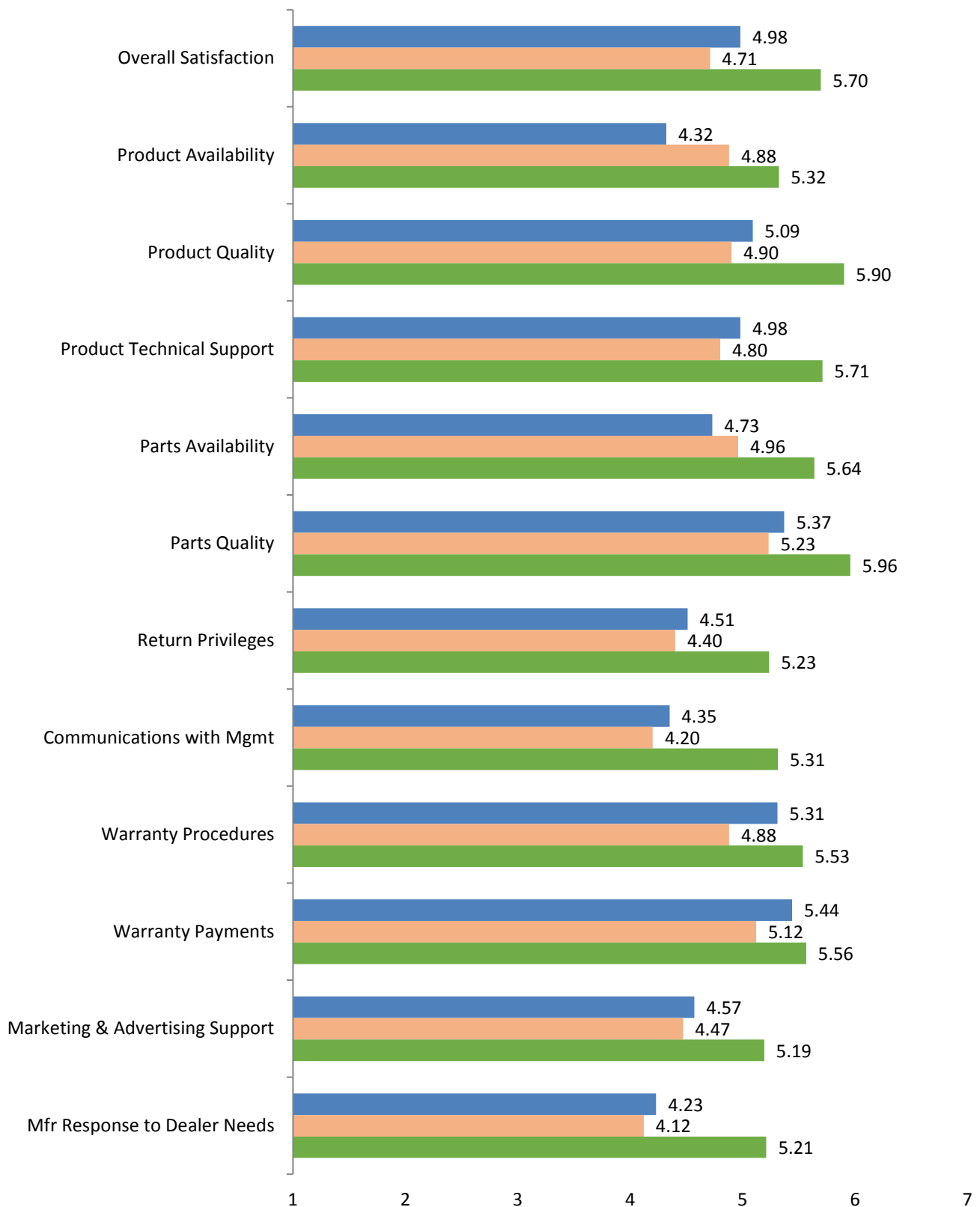
Honda

2021 Rating 2020 Rating All OPE Mfr Rating 2021



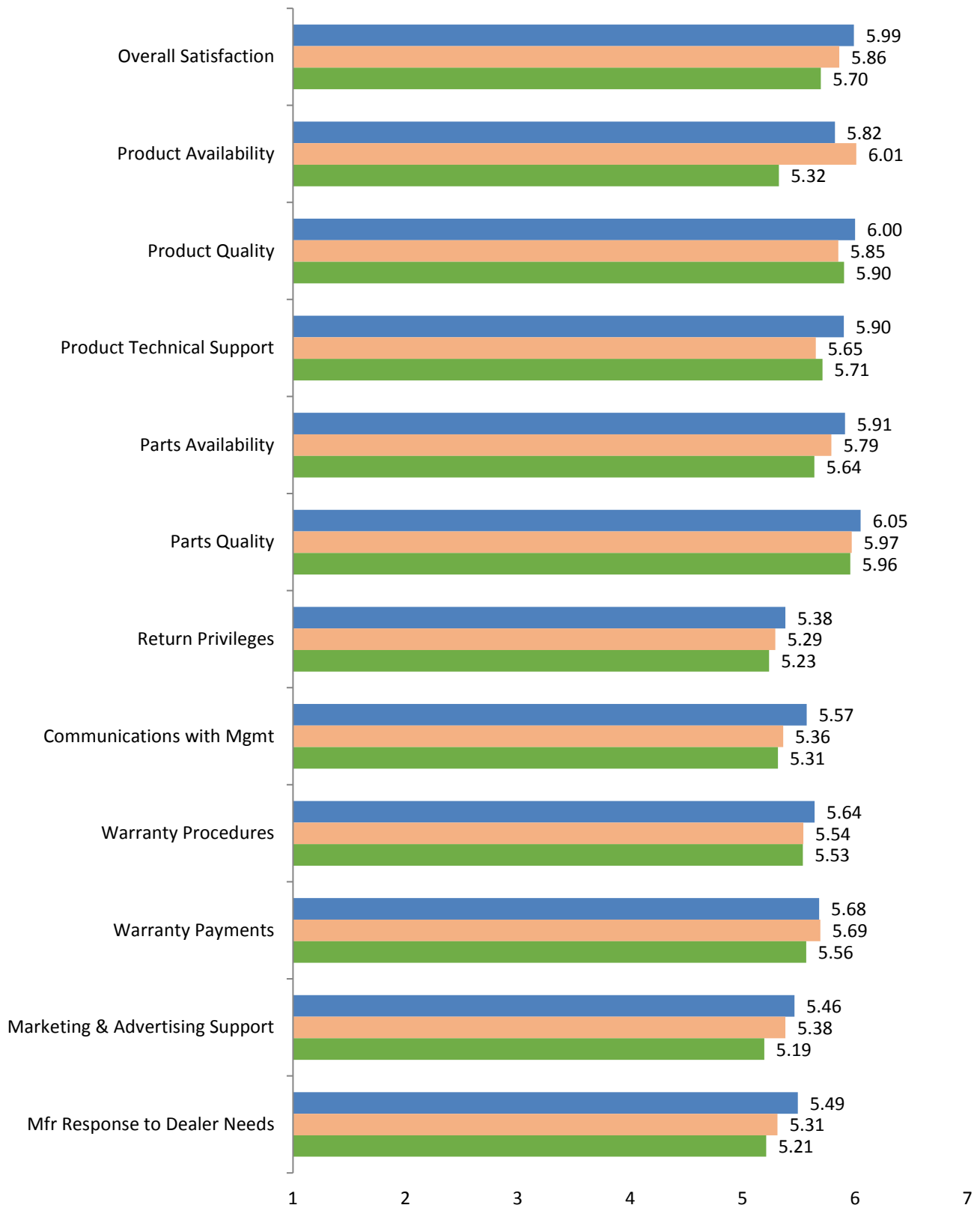
Husqvarna

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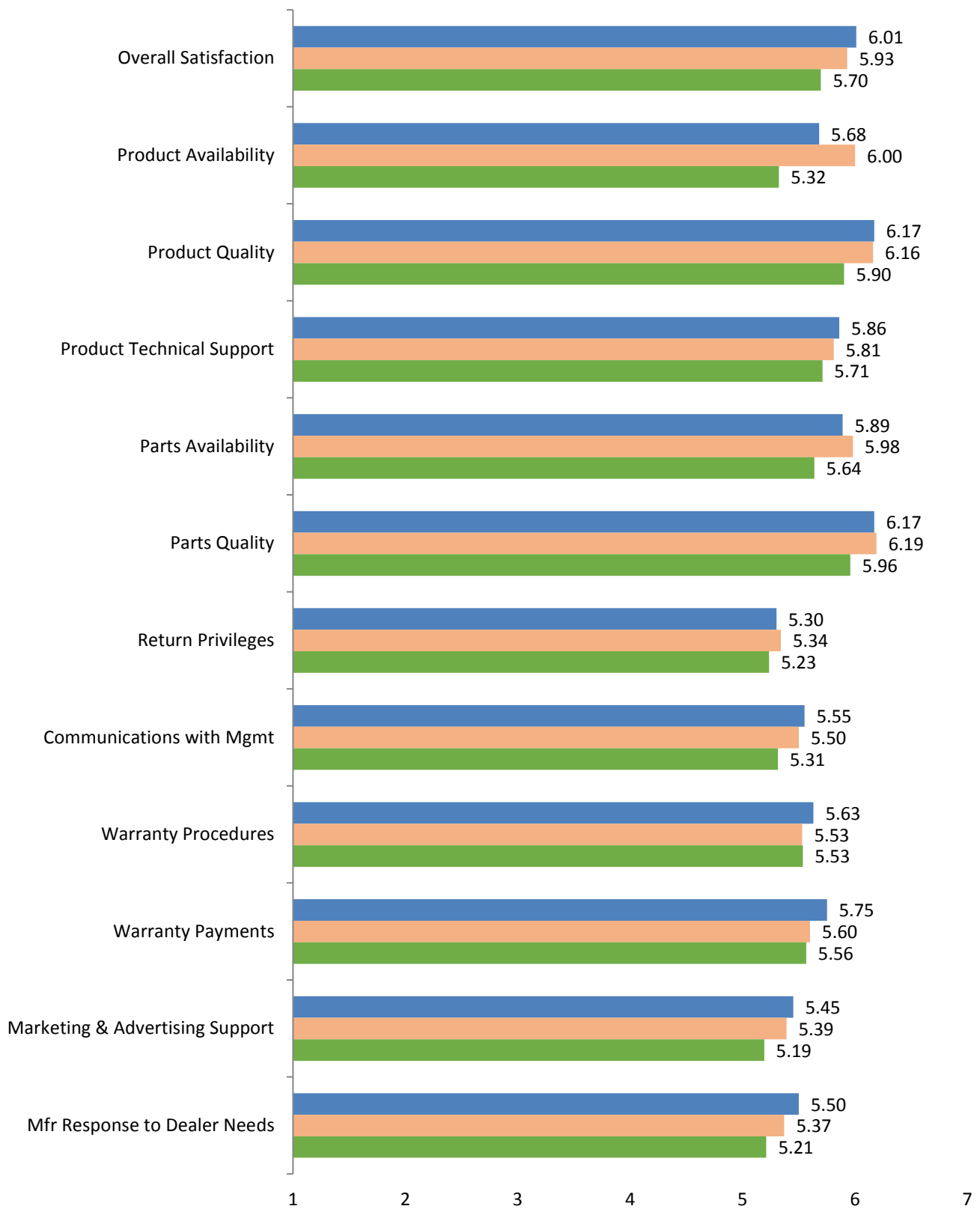
Hustler

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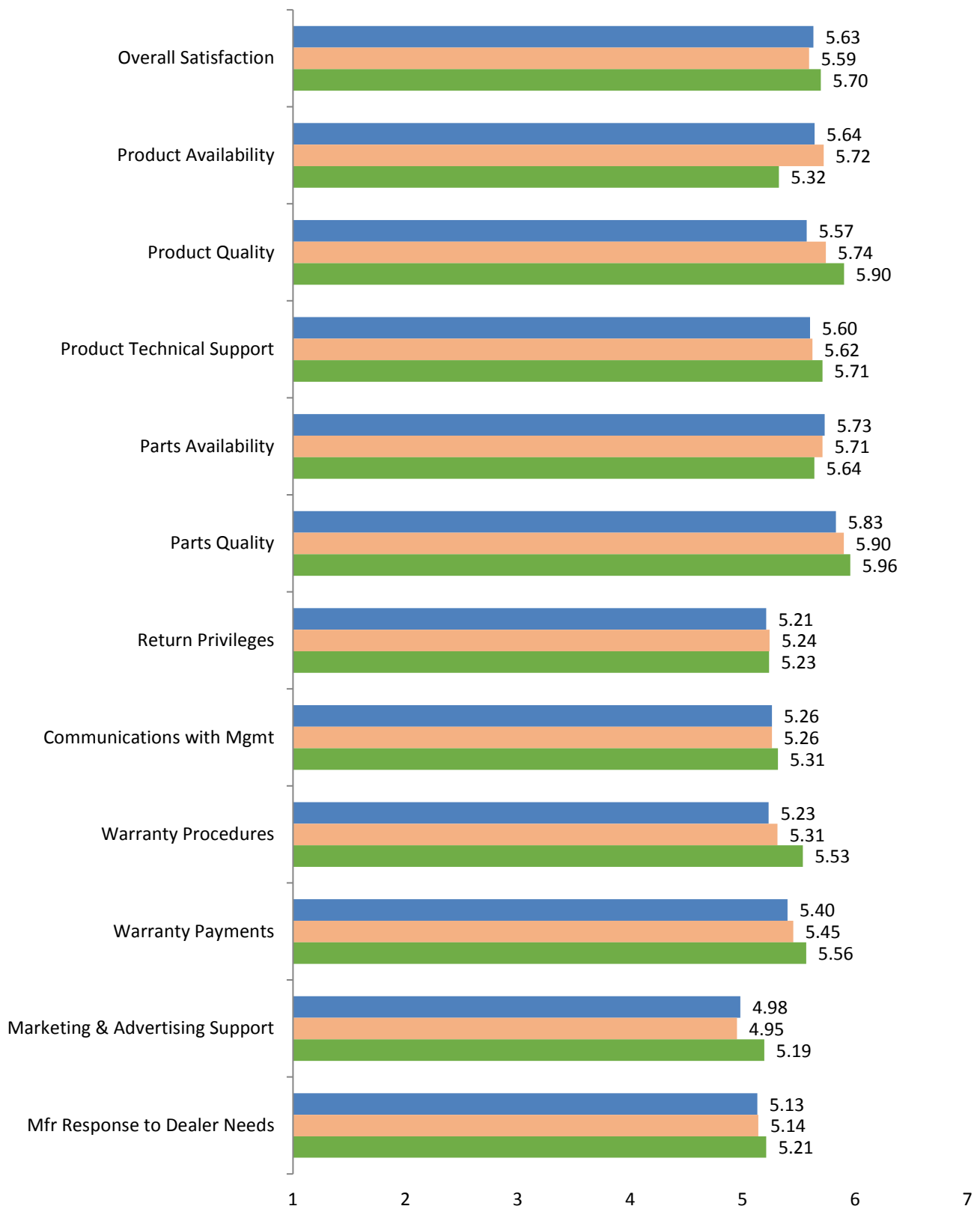
Kawasaki

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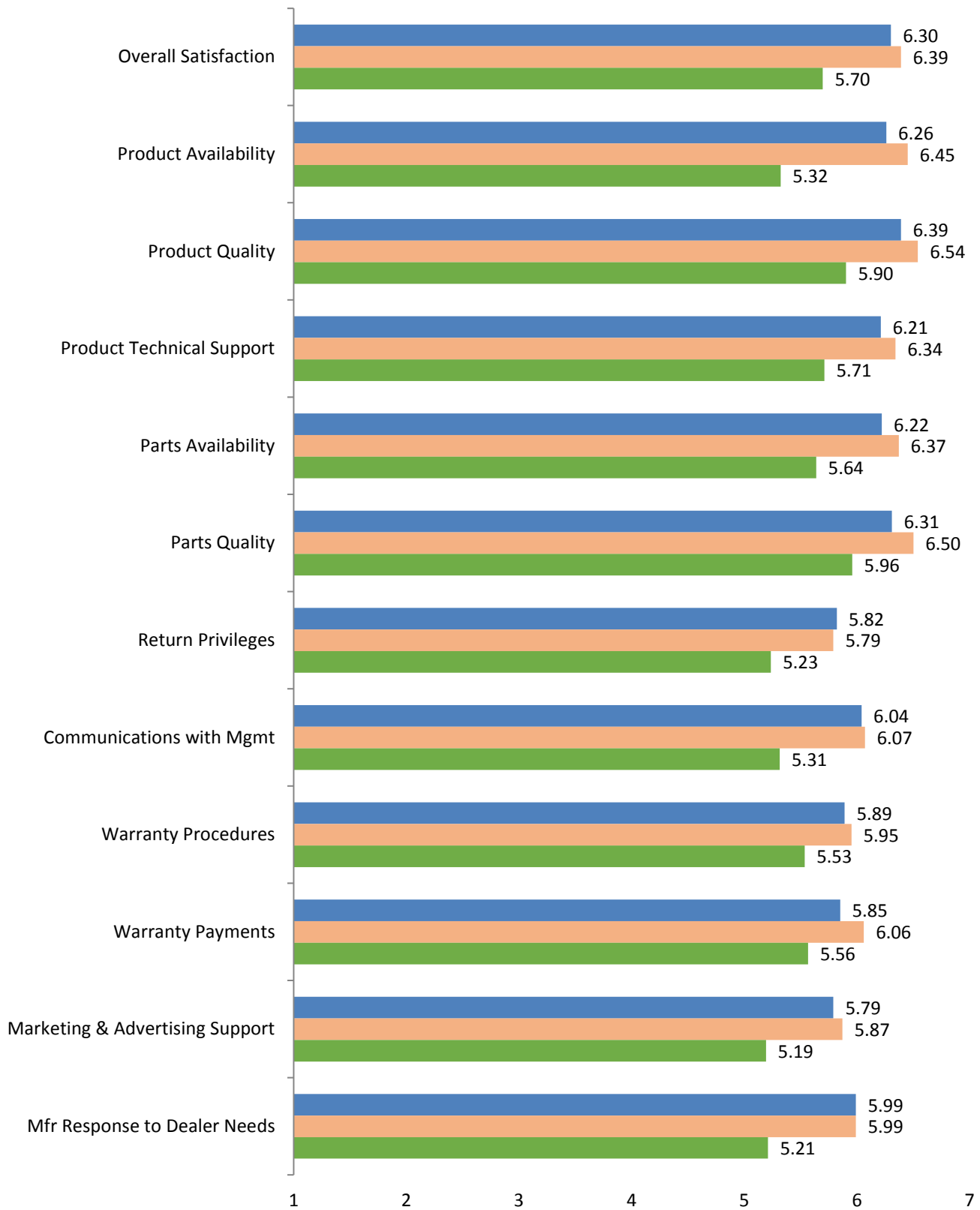
Kohler

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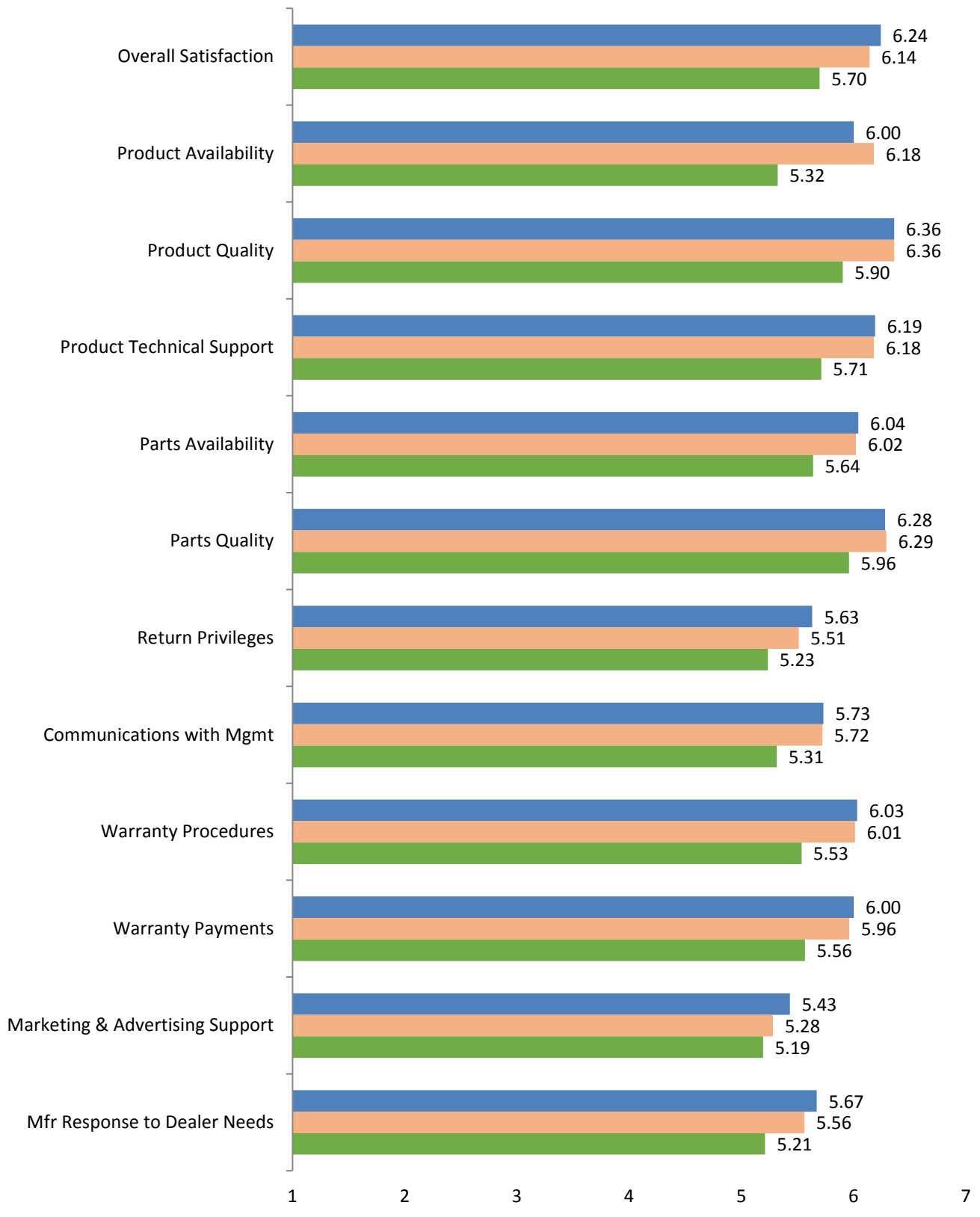
Scag

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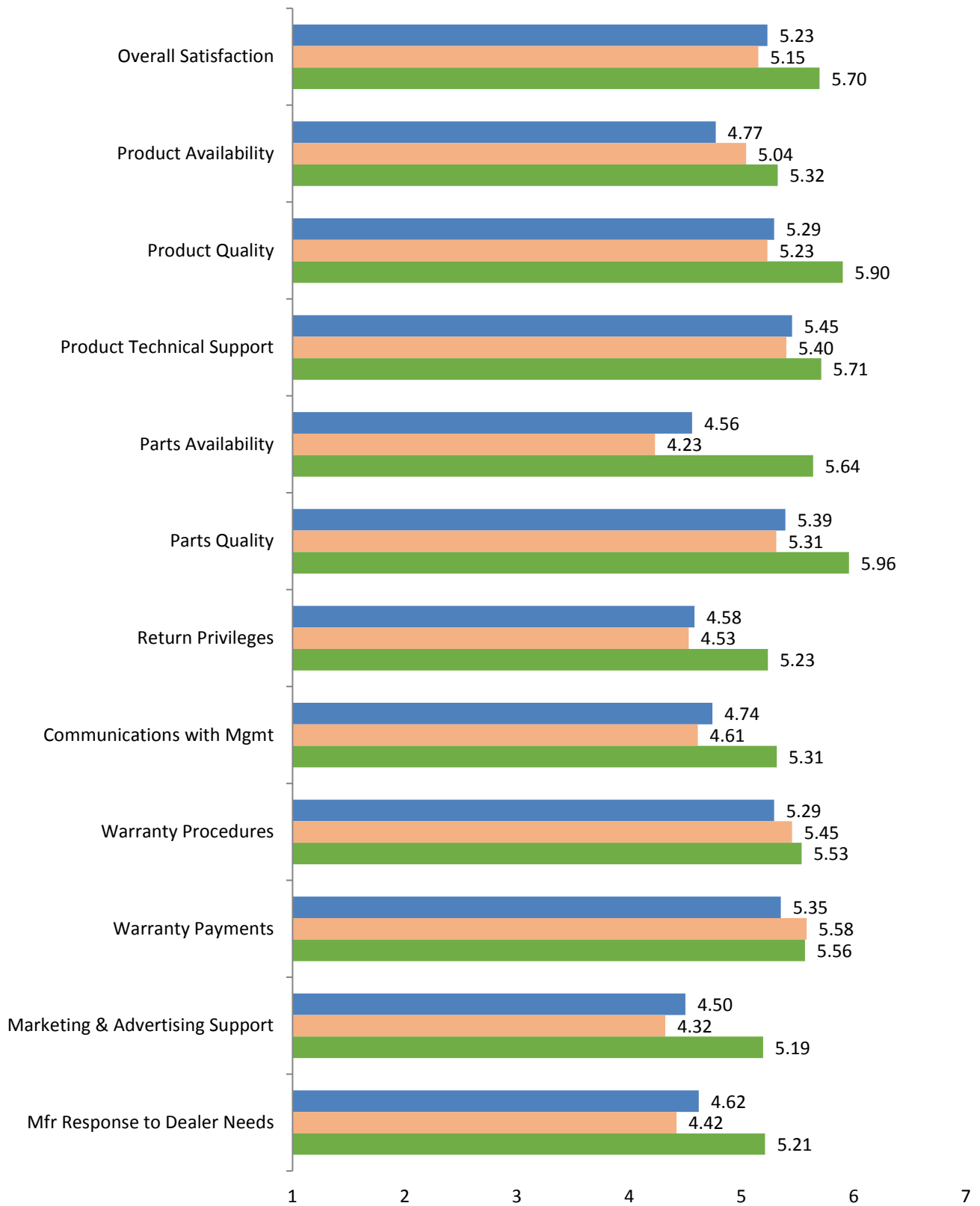
Shindaiwa

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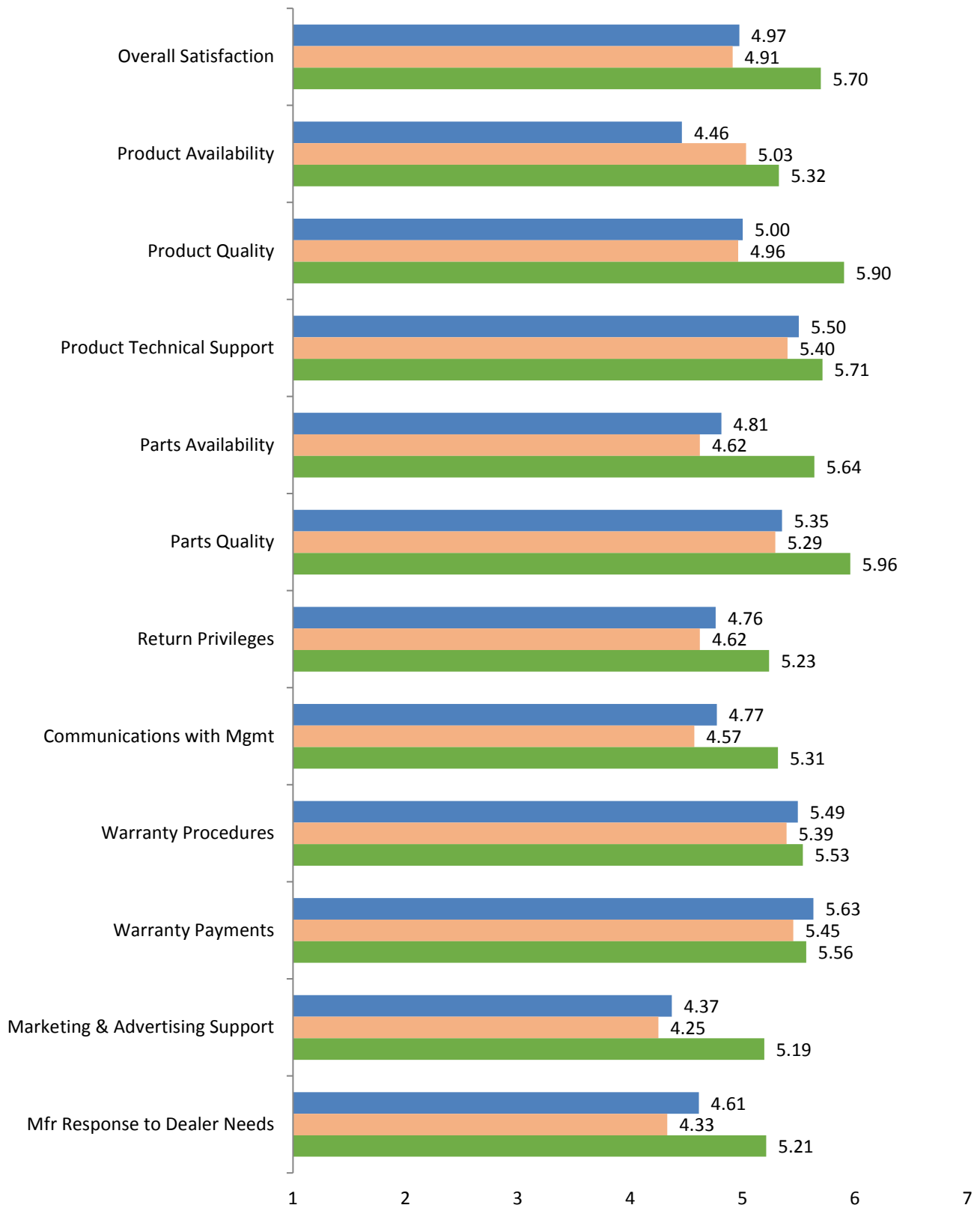
Simplicity

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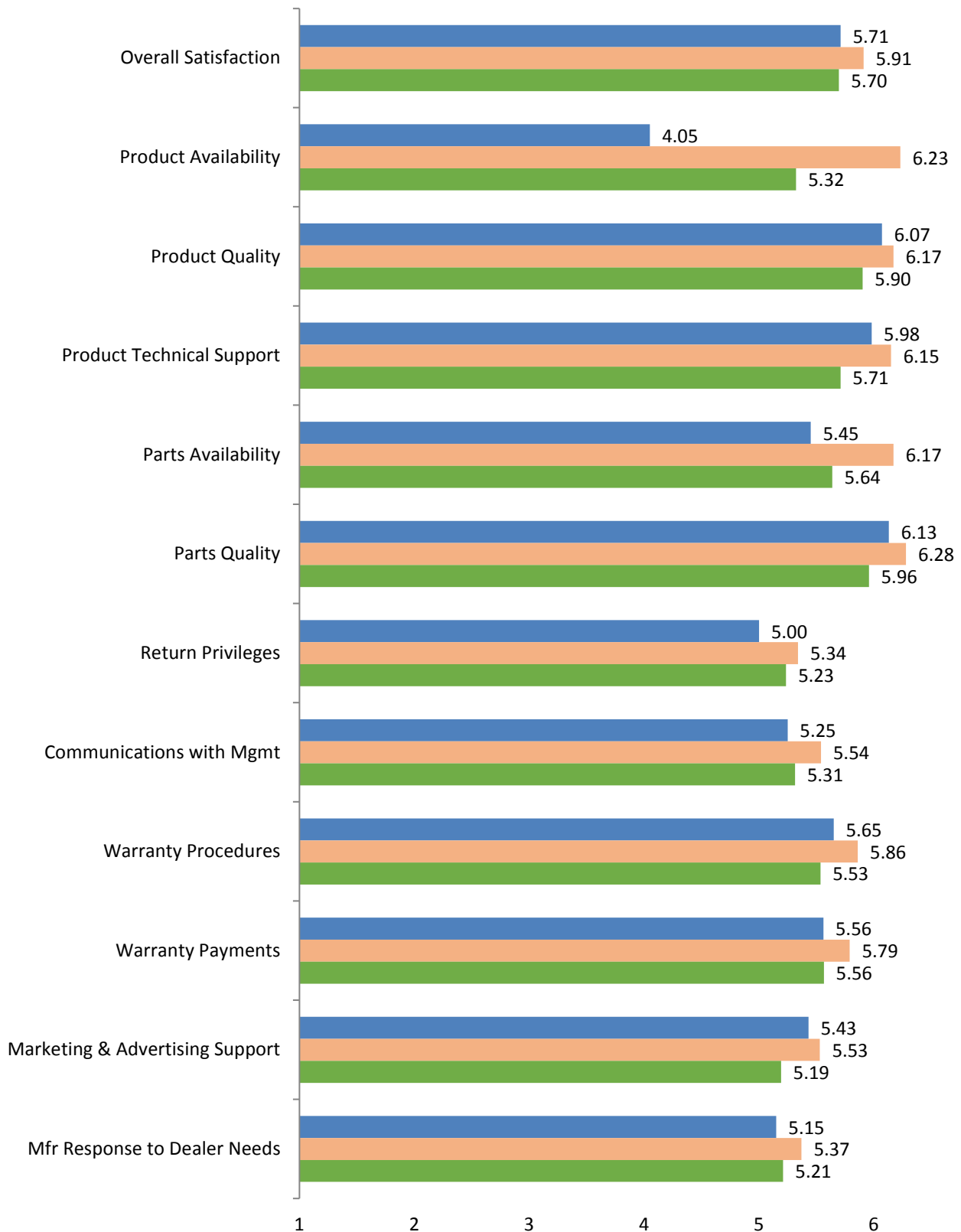
Snapper

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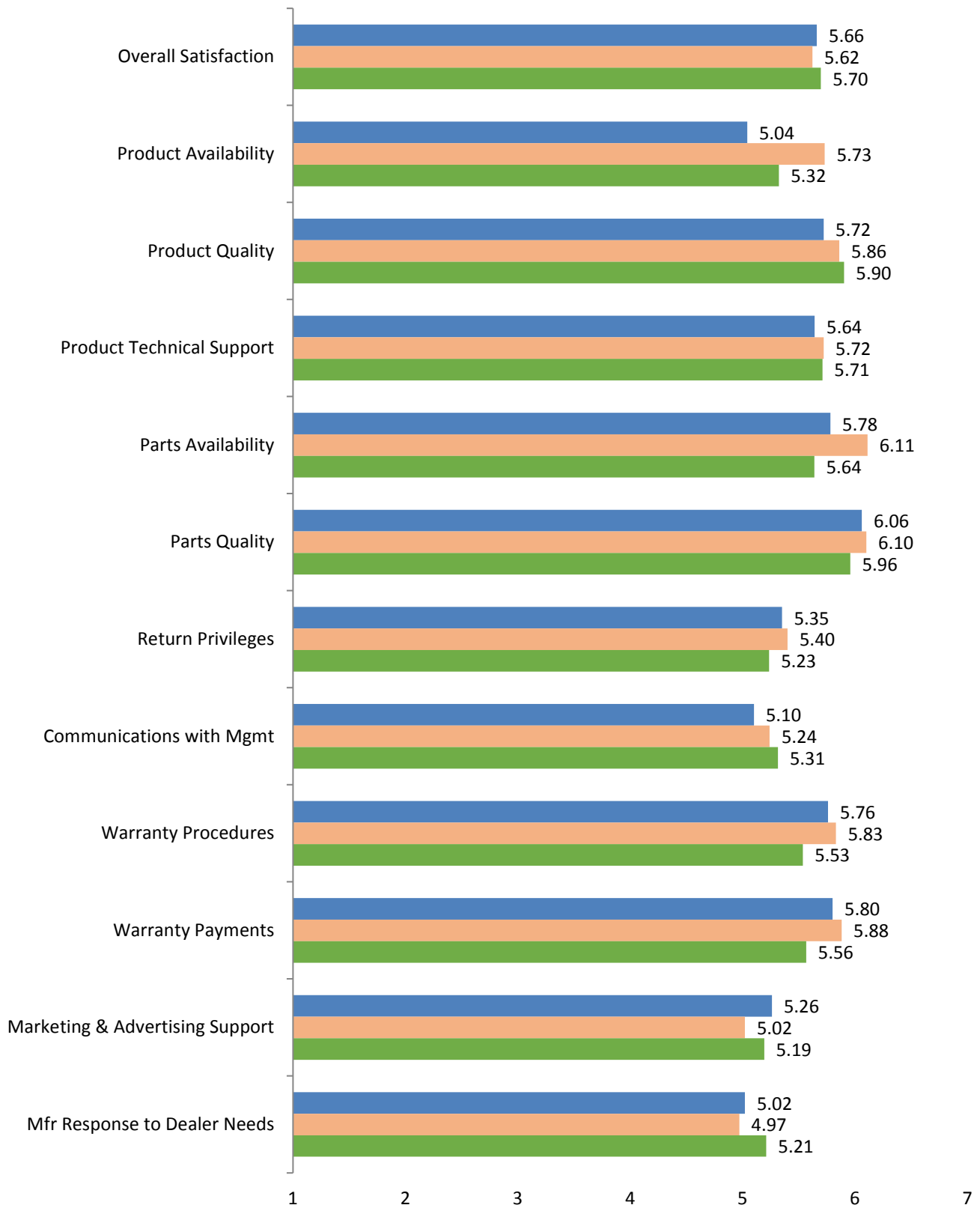
STIHL

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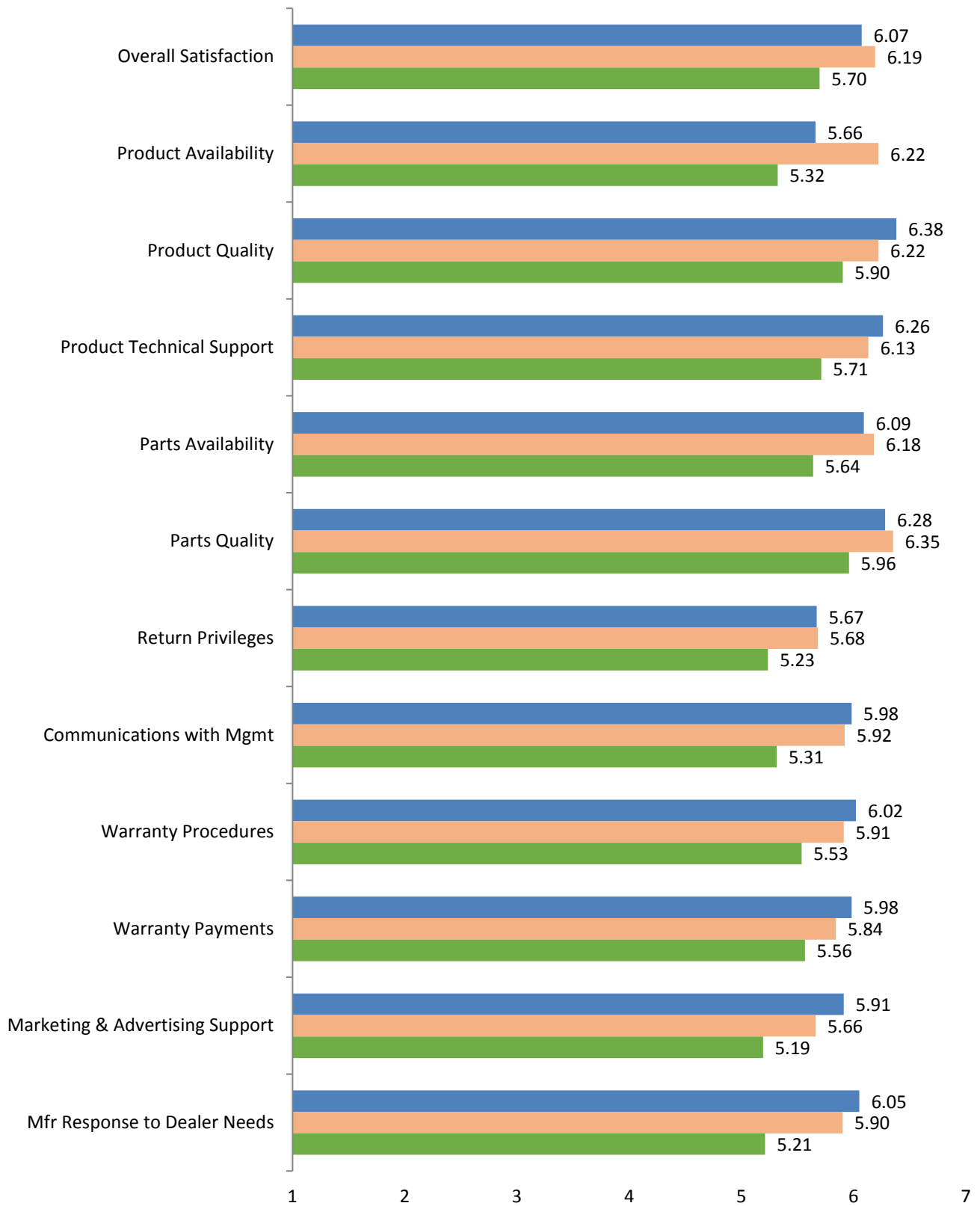
Toro

■ 2021 Rating ■ 2020 Rating ■ All OPE Mfr Rating 2021



Walker

■ 2021 Rating ■ 2020 Rating ■ All OPE Mfr Rating 2021



Wright Mfg.

■ 2021 Rating ■ 2020 Rating ■ All OPE Mfr Rating 2021

