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2008

# MoldMaking

## Capital Spending Survey & Forecast

• Mold Materials • Mold Components • Hot Runners • Mold Bases

Plants Planning to Purchase

### Mold bases

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### Definitions:

**Projected:** Based on survey returns these are our estimates of the total amount of dollars to be spent.

**Actual:** These are actual summations from the surveys that were returned (Not Projections).

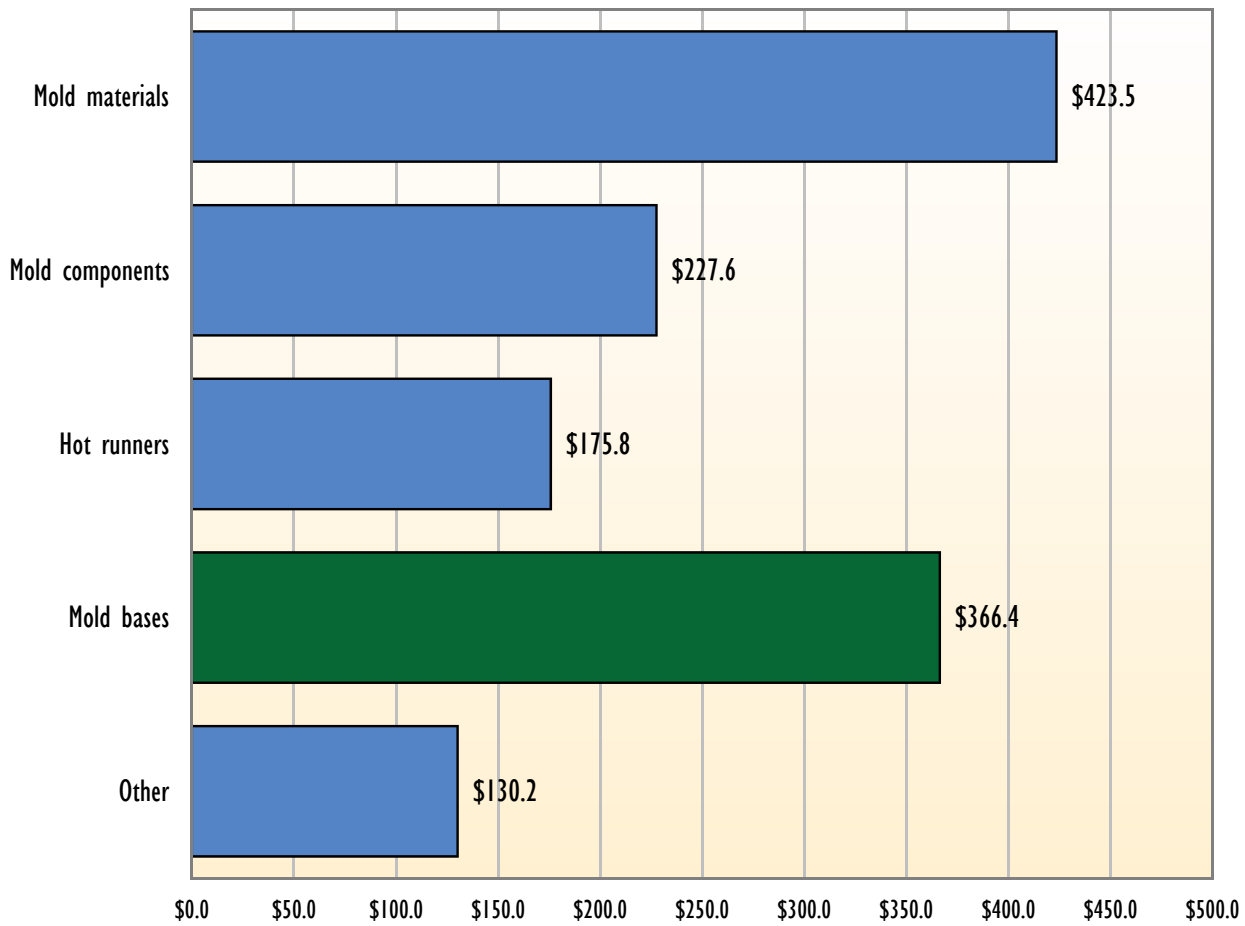
### Caution:

The projections represented in this report are based on surveys returned. Caution should be used when reviewing this report. Projections based on a small number of survey returns may be quite variable and could be misinterpreted.

2008

# Moldmaking Capital Spending Survey & Forecast

## Projected Moldmaking Expenditures By Type



Dollar figures are represented in millions of dollars

# 2008

## Moldmaking Capital Spending Survey & Forecast

### Projected Spending for

# Mold bases

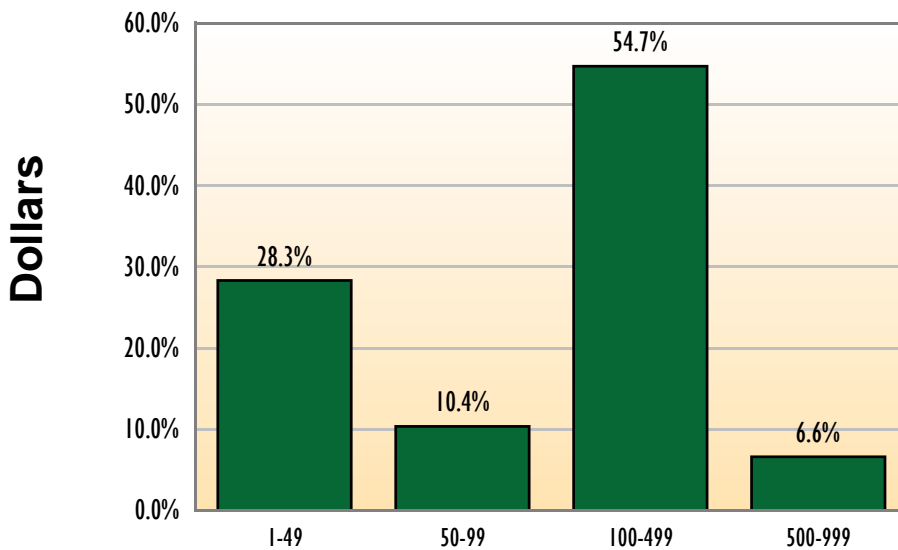
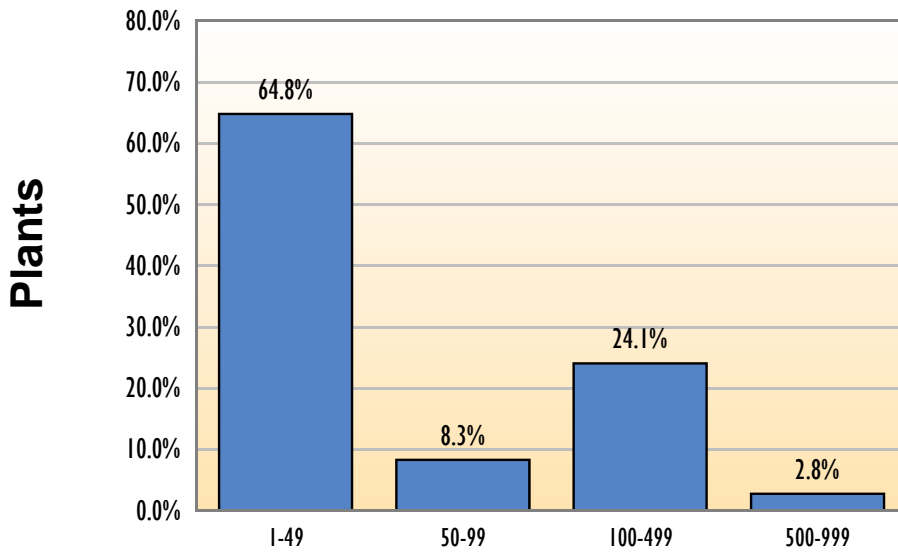
Industry Segment	Dollars
Custom Processors	\$171,541,691
Metalcutting Job Shops/Screw Machine Products	\$108,080,207
Other Manufacturing	\$28,989,710
Pumps, Valves & Plumbing Products	\$23,929,062
Forming & Fabricating (non-auto)	\$11,502,806
Medical	\$8,666,498
Electronics, Computers & Telecom	\$3,910,001
Plastics & Rubber	\$2,414,893
Hardware	\$2,110,741
Furniture Manufacturing	\$1,381,509
Industrial Motors, Hydraulic & Mechanical Comp.	\$1,110,338
Automotive	\$1,073,693
Aerospace	\$765,877
Petrochemical Processors	\$630,291
Non-Manufacturing	\$344,461
<b>Total</b>	<b>\$366,448,114</b>

Plant Size	Dollars
1-49	\$109,604,631
50-99	\$76,770,880
100-499	\$155,374,000
500-999	\$24,698,603
<b>Total</b>	<b>\$366,448,114</b>

# Moldmaking Capital Spending Survey & Forecast

## Plants Planning to Purchase By Plant Size

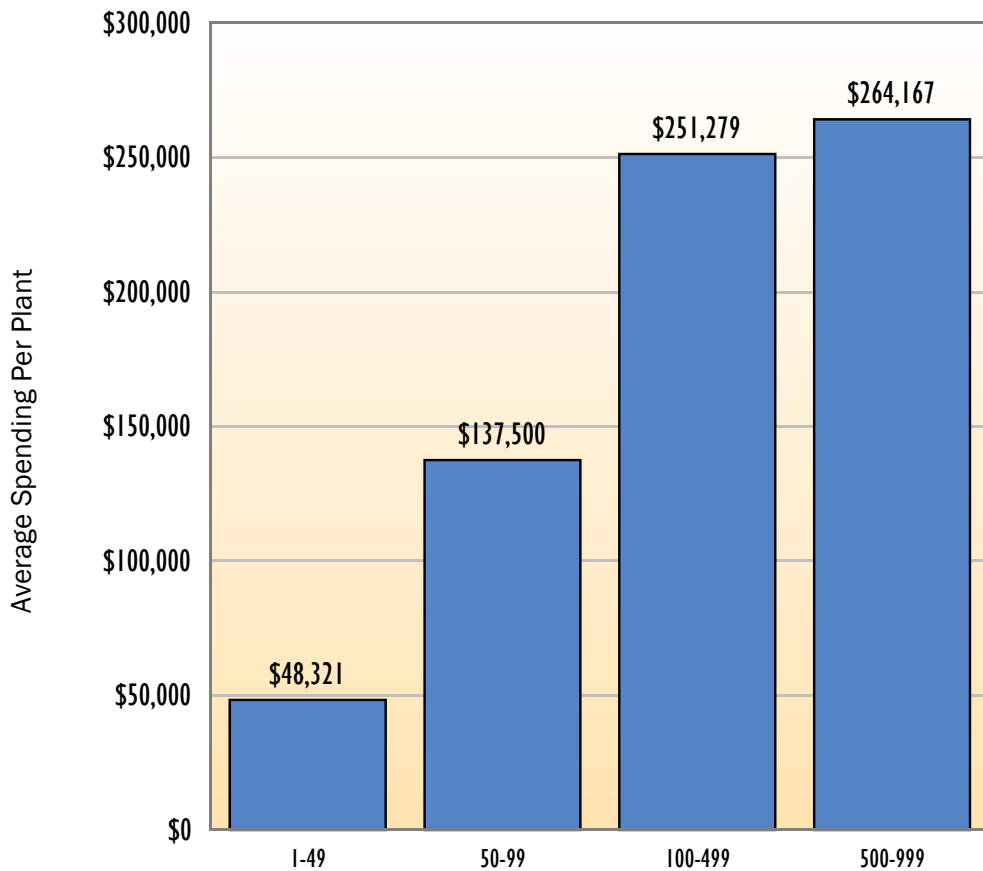
### Mold bases



## Moldmaking Capital Spending Survey & Forecast

### Average Spending Per Plant By Plant Size

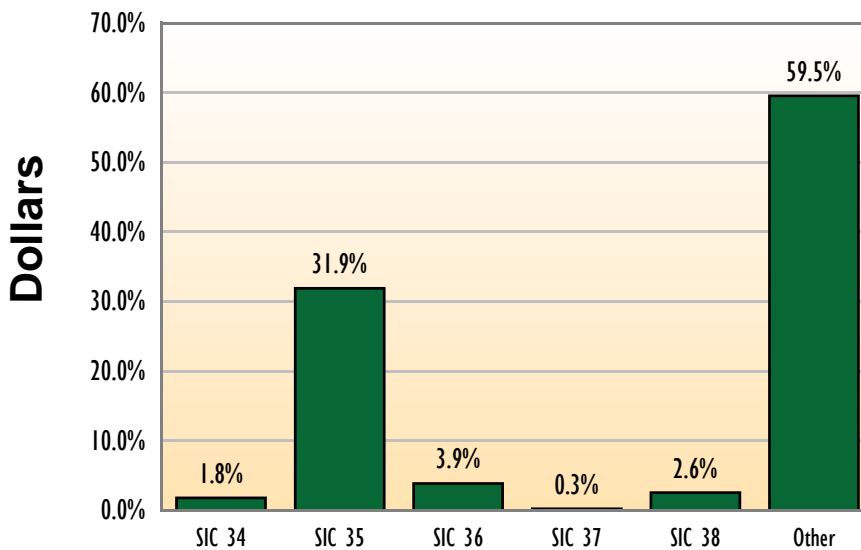
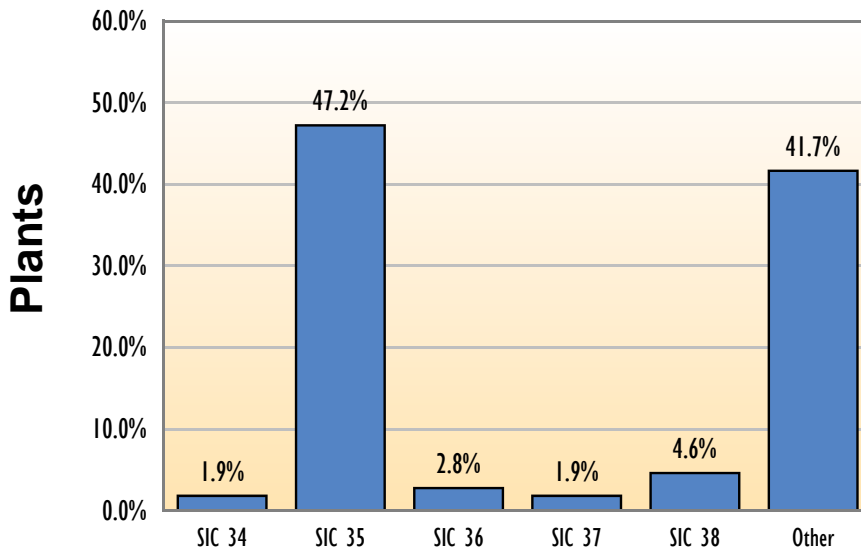
### Mold bases



## Moldmaking Capital Spending Survey & Forecast

### Plants Planning to Purchase By 2-Digit SIC

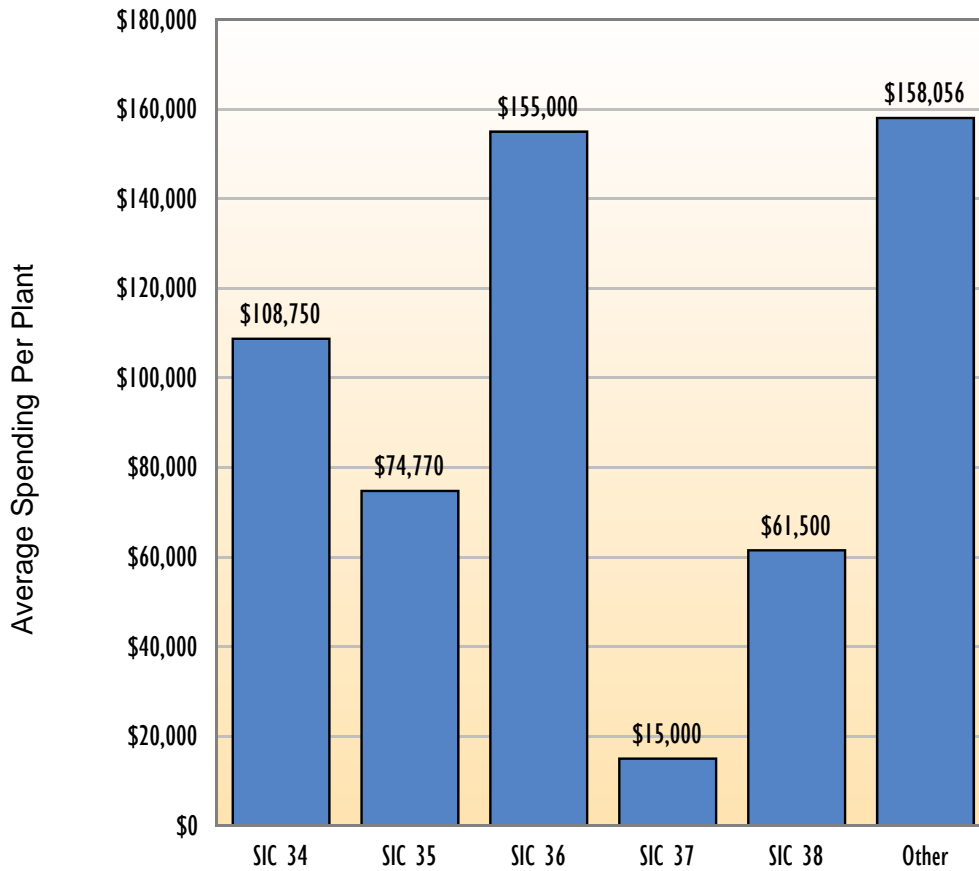
#### Mold bases



## Moldmaking Capital Spending Survey & Forecast

### Average Spending Per Plant By 2-Digit SIC

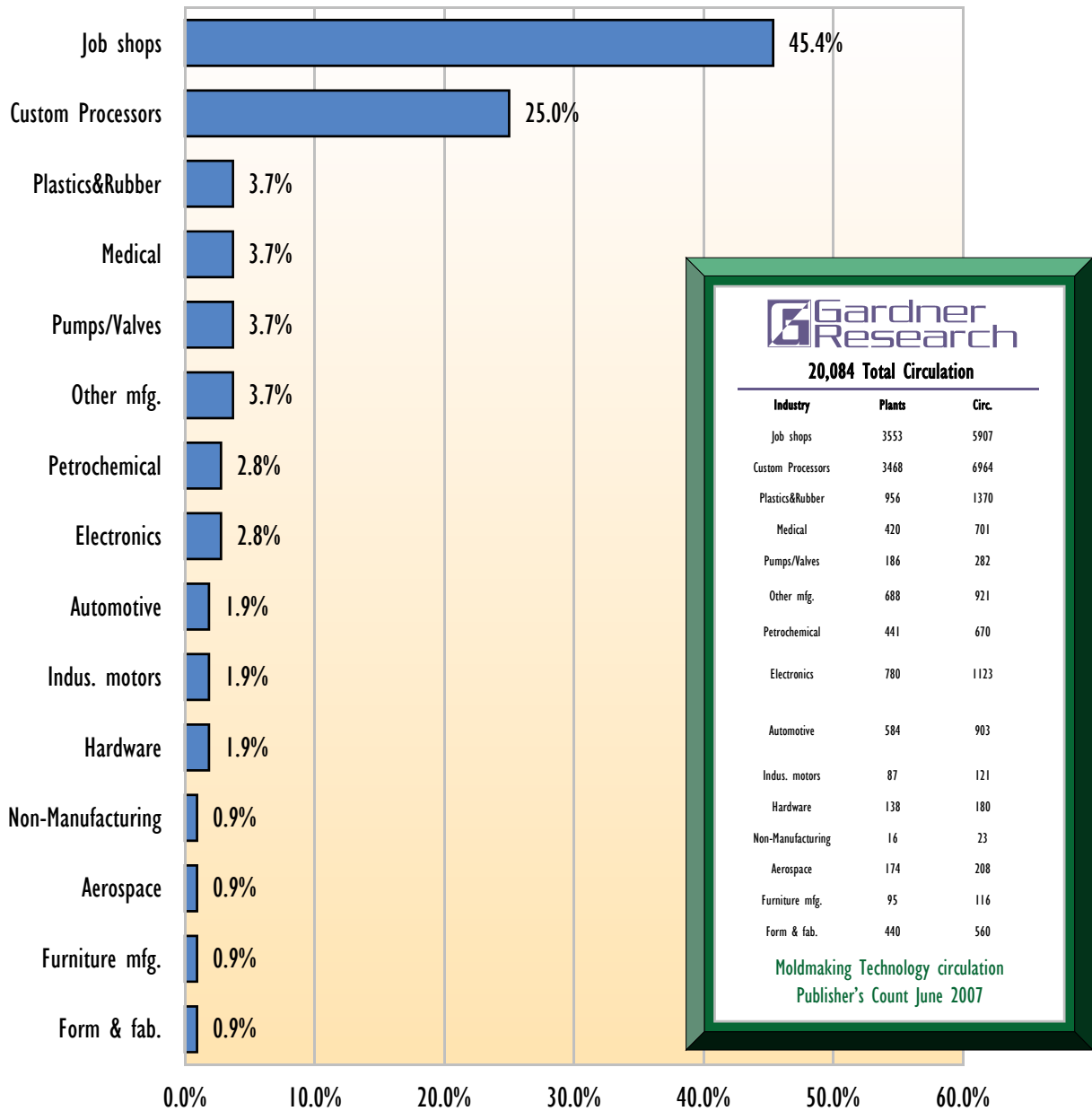
## Mold bases



## Moldmaking Capital Spending Survey & Forecast

Top Industry Segments: By Number of Plants For plants planning to purchase

### Mold bases



Gardner Research		
20,084 Total Circulation		
Industry	Plants	Circ.
Job shops	3553	5907
Custom Processors	3468	6964
Plastics&Rubber	956	1370
Medical	420	701
Pumps/Valves	186	282
Other mfg.	688	921
Petrochemical	441	670
Electronics	780	1123
Automotive	584	903
Indus. motors	87	121
Hardware	138	180
Non-Manufacturing	16	23
Aerospace	174	208
Furniture mfg.	95	116
Form & fab.	440	560

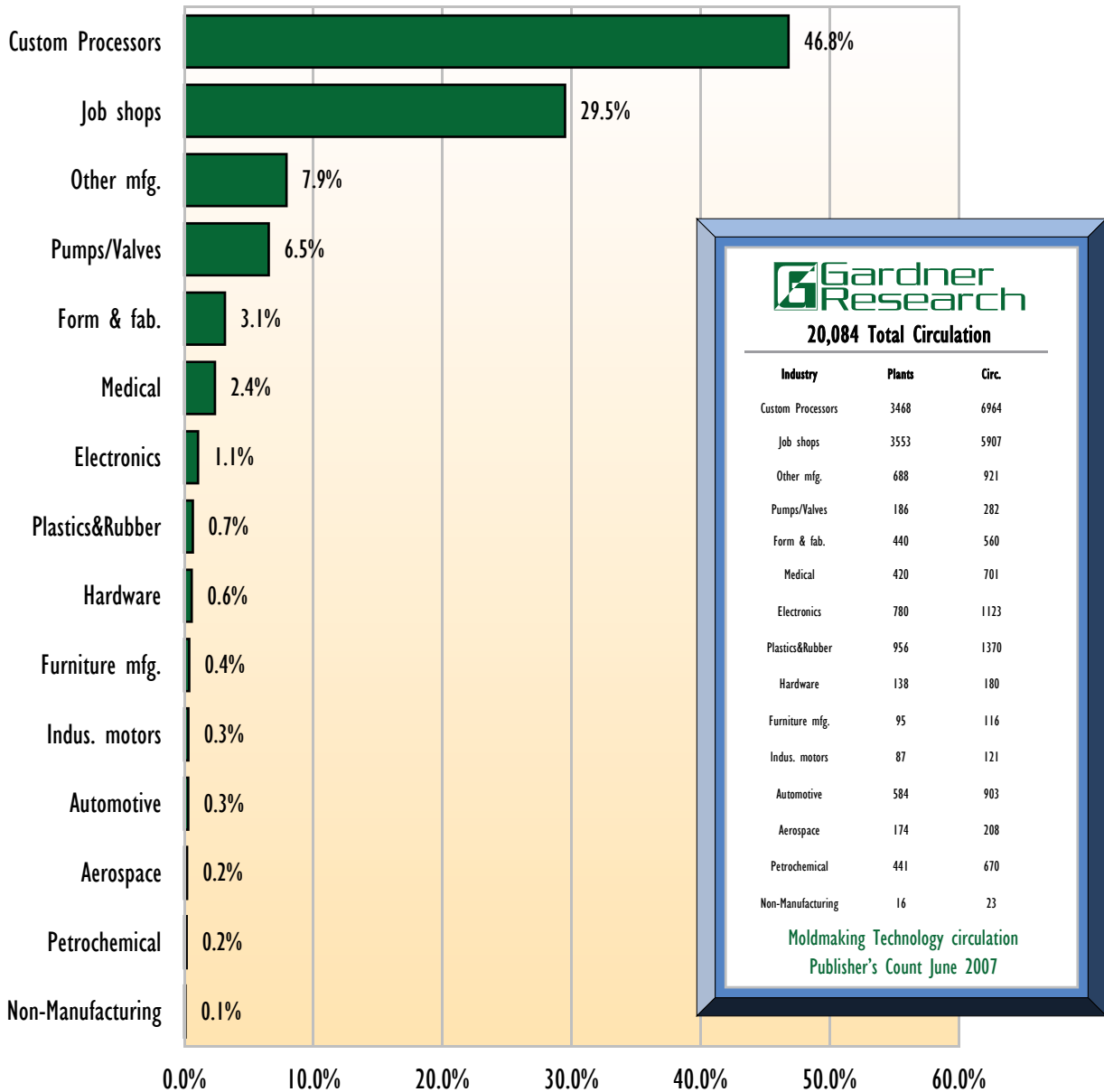
Moldmaking Technology circulation  
 Publisher's Count June 2007

% of total # of plants planning to purchase this equipment.

## Moldmaking Capital Spending Survey & Forecast

Top Industry Segments: By Dollar Volume For plants planning to purchase

### Mold bases



Percentage of total number of dollars planning to purchase this equipment.

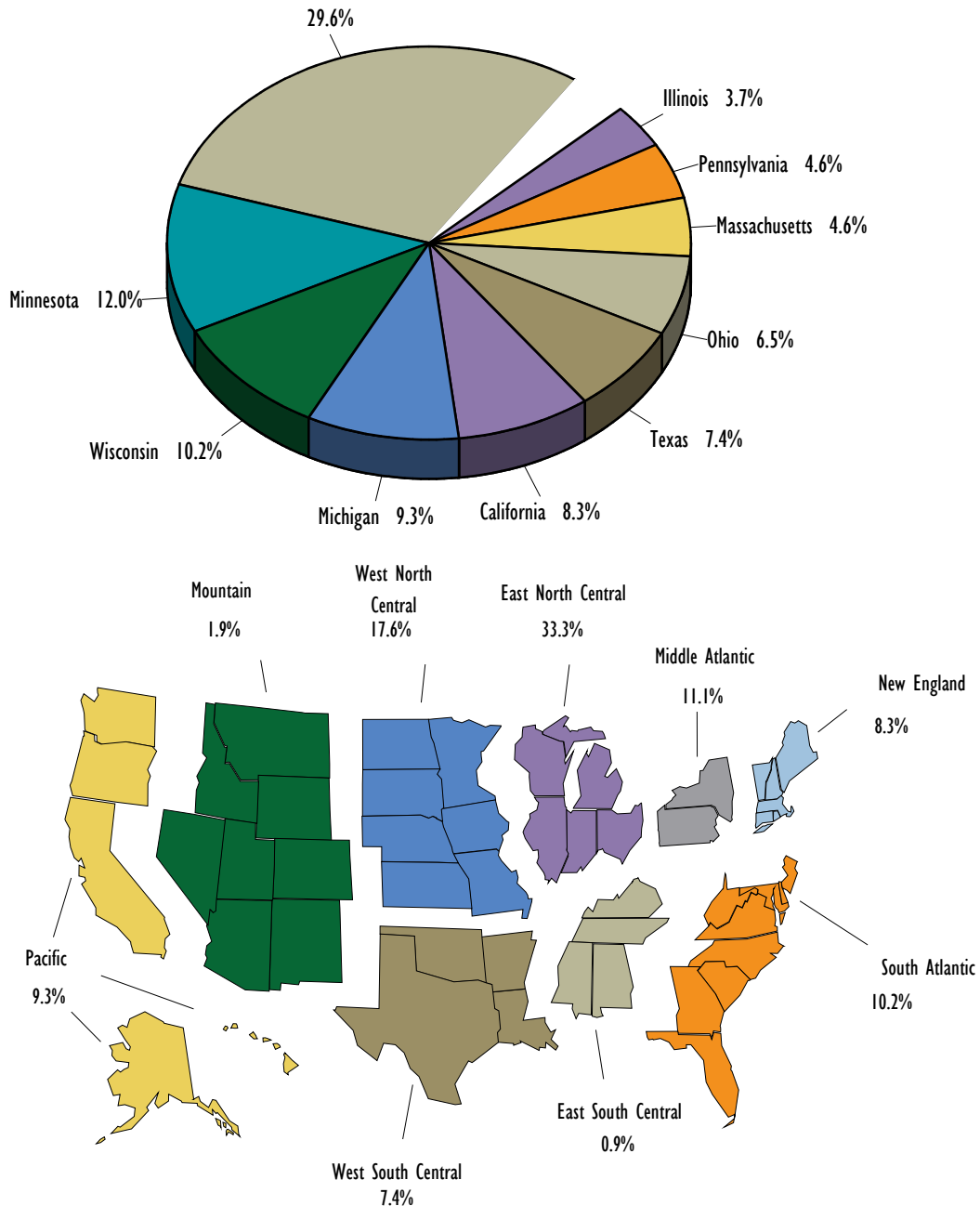
## Moldmaking Capital Spending Survey & Forecast

### Mold bases

#### By Number of Plants

The top 5 states represent 95.9% of the plants planning to purchase this type of equipment.

The top 10 states represent 70.4% of the plants planning to purchase this type of equipment.



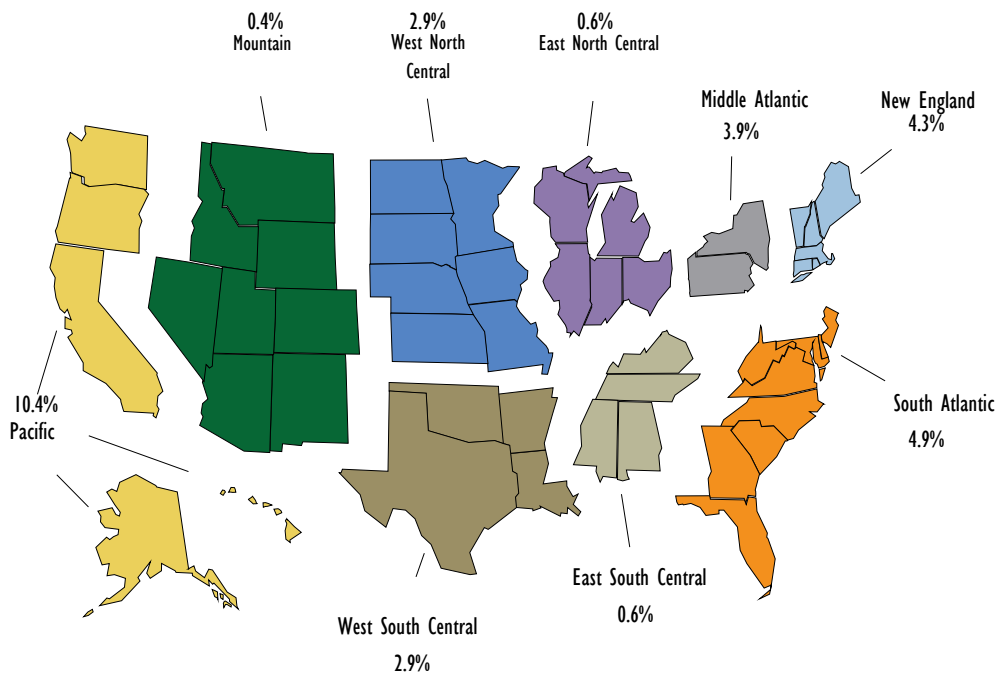
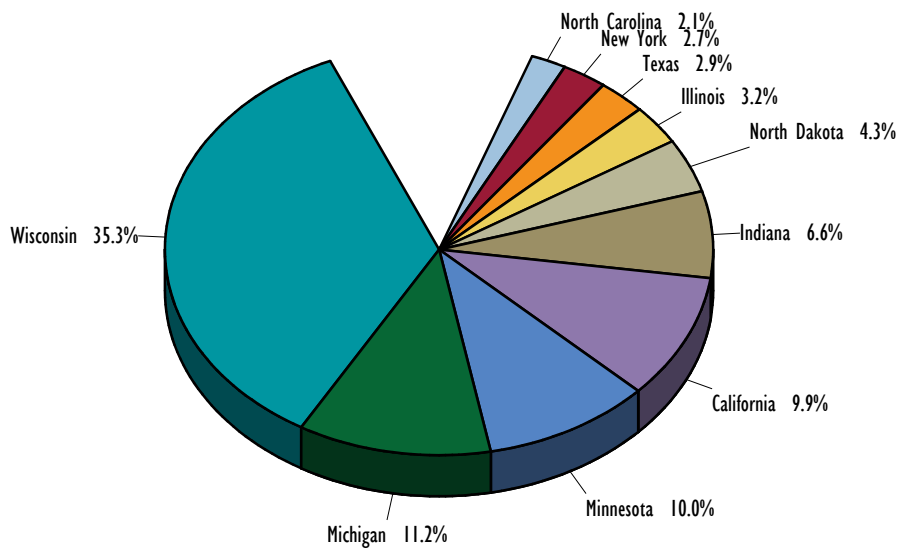
## Moldmaking Capital Spending Survey & Forecast

### Mold bases

#### By Dollars

The top 5 states represent 73.1% of the dollars to be spent on this type of equipment.

The top 10 states represent 88.2% of the dollars to be spent on this type of equipment.



Capital Spending Survey

By

NAICS, Industry Grouping & Plant Size

**For: Mold bases**

Date: 12/17/07

Note: \$\$ Figures are represented in Thousands of dollars



Magazine

6915 Valley Ave, Cincinnati, Ohio 45244

NAICS	Description	CIRC \$\$\$	% %	-0- to -19-	-20- to -49-	-50- to -99-	-100- to -249-	-250- to -499-	-500- to -999-	-1000- to -2499-	-2500- to -4900-	-5000- & MORE
336413	Other Aircraft Parts and Auxiliary	1	0.93		1							
		25	0.21		25							
<b>Aerospace</b>		<b>1</b>	<b>0.93</b>		<b>1</b>							
		<b>25</b>	<b>0.21</b>		<b>25</b>							
333120	Construction Machinery Manufacturing	1	0.93				1					
		30	0.25				30					
336399	All Other Motor Vehicle Parts	1	0.93						1			
		5	0.04						5			
<b>Automotive</b>		<b>2</b>	<b>1.85</b>				<b>1</b>		<b>1</b>			
		<b>35</b>	<b>0.29</b>				<b>30</b>		<b>5</b>			
326199	Custom Processors	23	21.3	6	2	4	8	3				
		5237	43.8	405	117	721	2656	1338				
326299	All Other Rubber Product	1	0.93				1					
		60	0.50				60					
333220	Plastics and Rubber Industry	1	0.93	1								
		34	0.28	34								
333511	Industrial Mold Manufacturing	2	1.85	1			1					
		268	2.24	18			250					
<b>Custom Processors</b>		<b>27</b>	<b>25.0</b>	<b>8</b>	<b>2</b>	<b>4</b>	<b>10</b>	<b>3</b>				
		<b>5599</b>	<b>46.8</b>	<b>457</b>	<b>117</b>	<b>721</b>	<b>2966</b>	<b>1338</b>				
334210	Telephone Apparatus Manufacturing	1	0.93				1					
		53	0.44				53					
334290	Other Communications Equipment	1	0.93				1					
		38	0.32				38					
334519	Other Measuring and Controlling	1	0.93				1					
		38	0.32				38					
<b>Electronics, Computers &amp; Telecom</b>		<b>3</b>	<b>2.78</b>				<b>3</b>					
		<b>129</b>	<b>1.08</b>				<b>129</b>					
334513	Instruments and Related Products	1	0.93				1					
		375	3.13				375					
<b>Forming &amp; Fabricating (non-auto)</b>		<b>1</b>	<b>0.93</b>				<b>1</b>					
		<b>375</b>	<b>3.13</b>				<b>375</b>					
339950	Sign Manufacturing	1	0.93		1							
		45	0.38		45							
<b>Furniture Manufacturing</b>		<b>1</b>	<b>0.93</b>		<b>1</b>							
		<b>45</b>	<b>0.38</b>		<b>45</b>							
332212	Hand and Edge Tool Manufacturing	1	0.93	1								
		1	0.01	1								
332510	Hardware Manufacturing	1	0.93		1							
		68	0.57		68							
<b>Hardware</b>		<b>2</b>	<b>1.85</b>	<b>1</b>	<b>1</b>							
		<b>69</b>	<b>0.58</b>	<b>1</b>	<b>68</b>							
331525	Copper Foundries (except	1	0.93		1							
		30	0.25		30							
333613	Mechanical Power Transmission	1	0.93	1								
		6	0.05	6								
<b>Industrial Motors, Hydraulic &amp;</b>		<b>2</b>	<b>1.85</b>	<b>1</b>	<b>1</b>							
		<b>36</b>	<b>0.30</b>	<b>6</b>	<b>30</b>							

NAICS	Description	CIRC \$\$\$	% %	-0- to -19-	-20- to -49-	-50- to -99-	-100- to -249-	-250- to -499-	-500- to -999-	-1000- to -2499-	-2500- to -4900-	-5000- & MORE
339112	Surgical and Medical Instrument	2	1.85		1		1					
		253	2.12		3		250					
339114	Dental Equipment and Supplies	1	0.93		1							
		15	0.13		15							
339115	Ophthalmic Goods Manufacturing	1	0.93			1						
		15	0.13			15						
<b>Medical</b>		<b>4</b>	<b>3.70</b>		2	1	1					
		<b>283</b>	<b>2.38</b>		18	15	250					
326199	Custom Processors	2	1.85	2								
		43	0.36	43								
332710	Machine Shops	1	0.93				1					
		60	0.50				60					
333511	Industrial Mold Manufacturing	42	38.9	33	6	2			1			
		3248	27.2	1236	864	435			713			
333514	Special Die and Tool, Die Set, Jig, and	4	3.70	3				1				
		181	1.52	178				3				
<b>Metalcutting Job Shops/Screw</b>		<b>49</b>	<b>45.4</b>	38	6	3	1		1			
		<b>3532</b>	<b>29.5</b>	1457	864	495	3		713			
326299	All Other Rubber Product	1	0.93					1				
		625	5.22				625					
327999	All Other Miscellaneous Nonmetallic	1	0.93						1			
		225	1.88					225				
339920	Sporting and Athletic Goods	1	0.93							1		
		75	0.63							75		
339991	Gasket, Packing, and Sealing Device	1	0.93						1			
		20	0.17						20			
<b>Other Manufacturing</b>		<b>4</b>	<b>3.70</b>				1	2	1			
		<b>945</b>	<b>7.90</b>				625	245	75			
325199	All Other Basic Organic Chemical	1	0.93		1							
		6	0.05		6							
325221	Cellulosic Organic Fiber Manufacturing	1	0.93		1							
		4	0.03		4							
326299	All Other Rubber Product	1	0.93	1								
		10	0.08	10								
<b>Petrochemical Processors</b>		<b>3</b>	<b>2.78</b>	1	2							
		<b>20</b>	<b>0.16</b>	10	10							
326121	Unlaminated Plastics Profile Shape	1	0.93	1								
		19	0.16	19								
326199	Custom Processors	1	0.93				1					
		8	0.07				8					
326291	Rubber Product Manufacturing for	1	0.93					1				
		38	0.32				38					
326299	All Other Rubber Product	1	0.93		1							
		15	0.13		15							
<b>Plastics &amp; Rubber</b>		<b>4</b>	<b>3.70</b>	1	1	1	1					
		<b>80</b>	<b>0.68</b>	19	15	8	38					
326122	Plastics Pipe and Pipe Fitting	1	0.93						1			
		510	4.26						510			
332919	Other Metal Valve and Pipe Fitting	1	0.93	1								
		150	1.25	150								

NAICS	Description	CIRC \$\$\$	% %	-0- to -19-	-20- to -49-	-50- to -99-	-100- to -249-	-250- to -499-	-500- to -999-	-1000- to -2499-	-2500- to -4900-	-5000- & MORE
333912	Air and Gas Compressor	1	0.93						1			
		30	0.25						30			
339991	Gasket, Packing, and Sealing Device	1	0.93		1							
		90	0.75		90							
<b>Pumps, Valves &amp; Plumbing Products</b>		<b>4</b>	<b>3.70</b>	<b>1</b>	<b>1</b>				<b>2</b>			
		<b>780</b>	<b>6.51</b>	<b>150</b>	<b>90</b>				<b>540</b>			
333511	Industrial Mold Manufacturing	1	0.93	1								
		11	0.09	11								
<b>Non-Manufacturing</b>		<b>1</b>	<b>0.93</b>	<b>1</b>								
		<b>11</b>	<b>0.09</b>	<b>11</b>								

# OVERALL TOTALS

	<b>CIRC</b>	<b>%</b>	<b>-0-</b>	<b>-20-</b>	<b>-50-</b>	<b>-100-</b>	<b>-250-</b>	<b>-500-</b>	<b>-1000-</b>	<b>-2500-</b>	<b>-5000-</b>
	<b>\$\$\$</b>	<b>%</b>	<b>to</b>	<b>to</b>	<b>to</b>	<b>to</b>	<b>to</b>	<b>to</b>	<b>to</b>	<b>to</b>	<b>&amp;</b>
			<b>-19-</b>	<b>-49-</b>	<b>-99-</b>	<b>-249-</b>	<b>-499-</b>	<b>-999-</b>	<b>-2499-</b>	<b>-4900-</b>	<b>MORE</b>
<b>Overall</b>	108	100.00	52	18	9	19	7	3			
	11964	100.00	2111	1282	1239	4416	2123	793			

**Mold bases  
- Geographical Summary -**

<b>State</b>	<b>Plants</b>	<b>Percent</b>	<b>Budget</b>	<b>Percent</b>
Connecticut	3	2.78	121	1.02
Massachusetts	5	4.63	203	1.70
Vermont	1	0.93	188	1.57
<b>New England</b>	<b>9</b>	<b>8.33 %</b>	<b>512</b>	<b>4.29 %</b>
New Jersey	3	2.78	88	0.74
New York	4	3.70	321	2.69
Pennsylvania	5	4.63	57	0.48
<b>Mid-Atlantic</b>	<b>12</b>	<b>11.11 %</b>	<b>466</b>	<b>3.91 %</b>
Illinois	4	3.70	382	3.20
Indiana	4	3.70	791	6.61
Michigan	10	9.26	1,344	11.24
Ohio	7	6.48	177	1.47
Wisconsin	11	10.19	4,219	35.25
<b>E. N. Central</b>	<b>36</b>	<b>33.33 %</b>	<b>6,913</b>	<b>57.77 %</b>
Iowa	1	0.93	4	0.03
Kansas	1	0.93	25	0.21
Minnesota	13	12.04	1,197	10.01
Missouri	2	1.85	23	0.19
Nebraska	1	0.93	30	0.25
North Dakota	1	0.93	510	4.26
<b>W. N. Central</b>	<b>19</b>	<b>17.59 %</b>	<b>1,789</b>	<b>14.95 %</b>
Florida	1	0.93	6	0.05
Georgia	2	1.85	231	1.93
Maryland	2	1.85	19	0.16
North Carolina	2	1.85	251	2.10
South Carolina	3	2.78	56	0.47
Virginia	1	0.93	20	0.17
<b>S. Atlantic</b>	<b>11</b>	<b>10.19 %</b>	<b>583</b>	<b>4.88 %</b>
Kentucky	1	0.93	68	0.57
<b>E. S. Central</b>	<b>1</b>	<b>0.93 %</b>	<b>68</b>	<b>0.57 %</b>
Texas	8	7.41	347	2.90
<b>W. S. Central</b>	<b>8</b>	<b>7.41 %</b>	<b>347</b>	<b>2.90 %</b>
Arizona	1	0.93	8	0.07
Montana	1	0.93	38	0.32
<b>Mountain</b>	<b>2</b>	<b>1.85 %</b>	<b>46</b>	<b>0.39 %</b>
California	9	8.33	1,187	9.93
Washington	1	0.93	53	0.44
<b>Pacific</b>	<b>10</b>	<b>9.26 %</b>	<b>1,240</b>	<b>10.37 %</b>

**Total Plants**

**108**

**Total Dollars**

**11,964**