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# 2008

# Finishing

## Capital Spending

## Survey & Forecast

- Application Equipment • Fluid Delivery Equipment • Plating/Anodizing Equipment • Support Equipment • Mass Finishing Equipment

Plants Planning to Purchase

## **Application Equipment**

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## FINISHING Capital Spending Survey & Forecast

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#### Definitions:

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

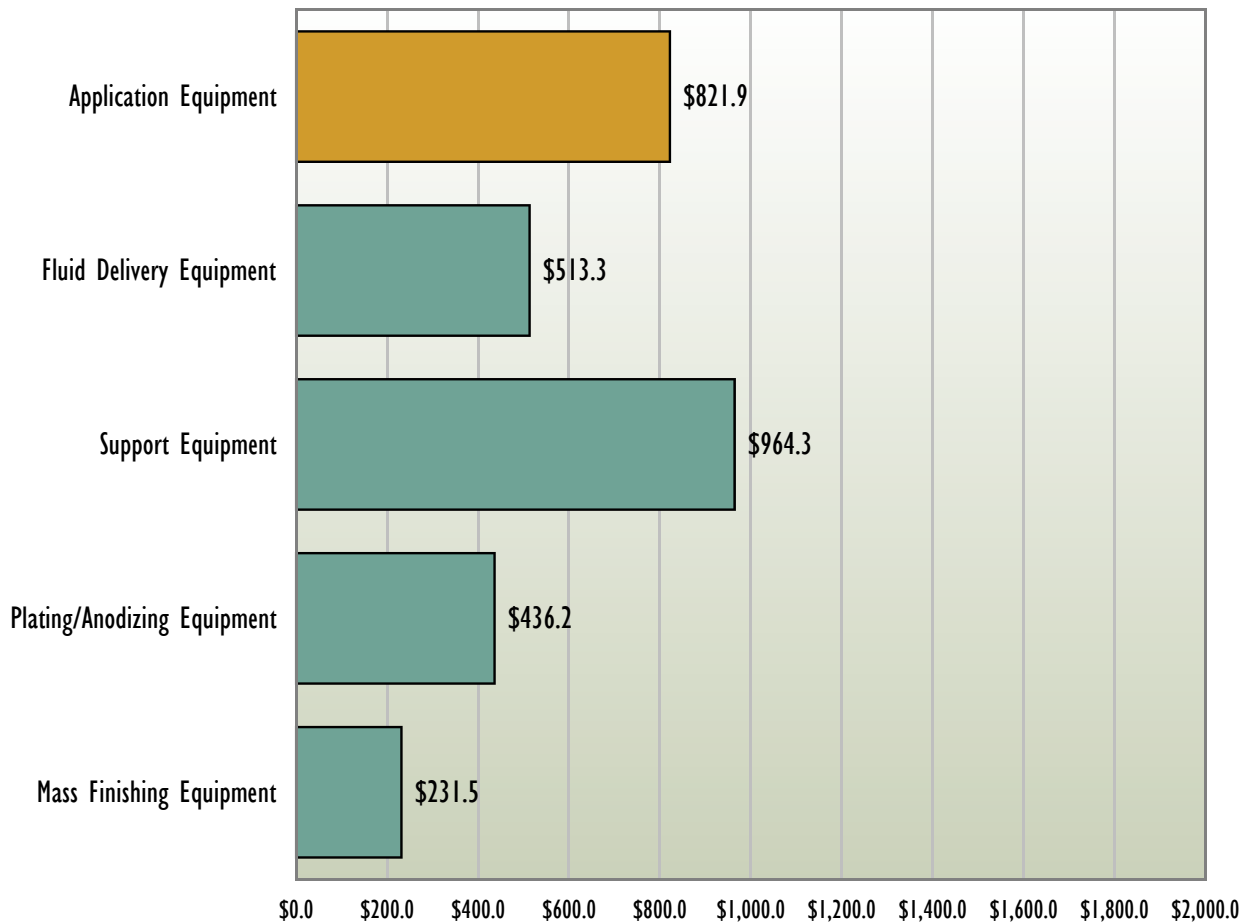
**Actual:** These are actual summations from the surveys that were returned (Not Projections).

#### 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.

## FINISHING Capital Spending Survey & Forecast

### Projected Finishing Expenditures By Type

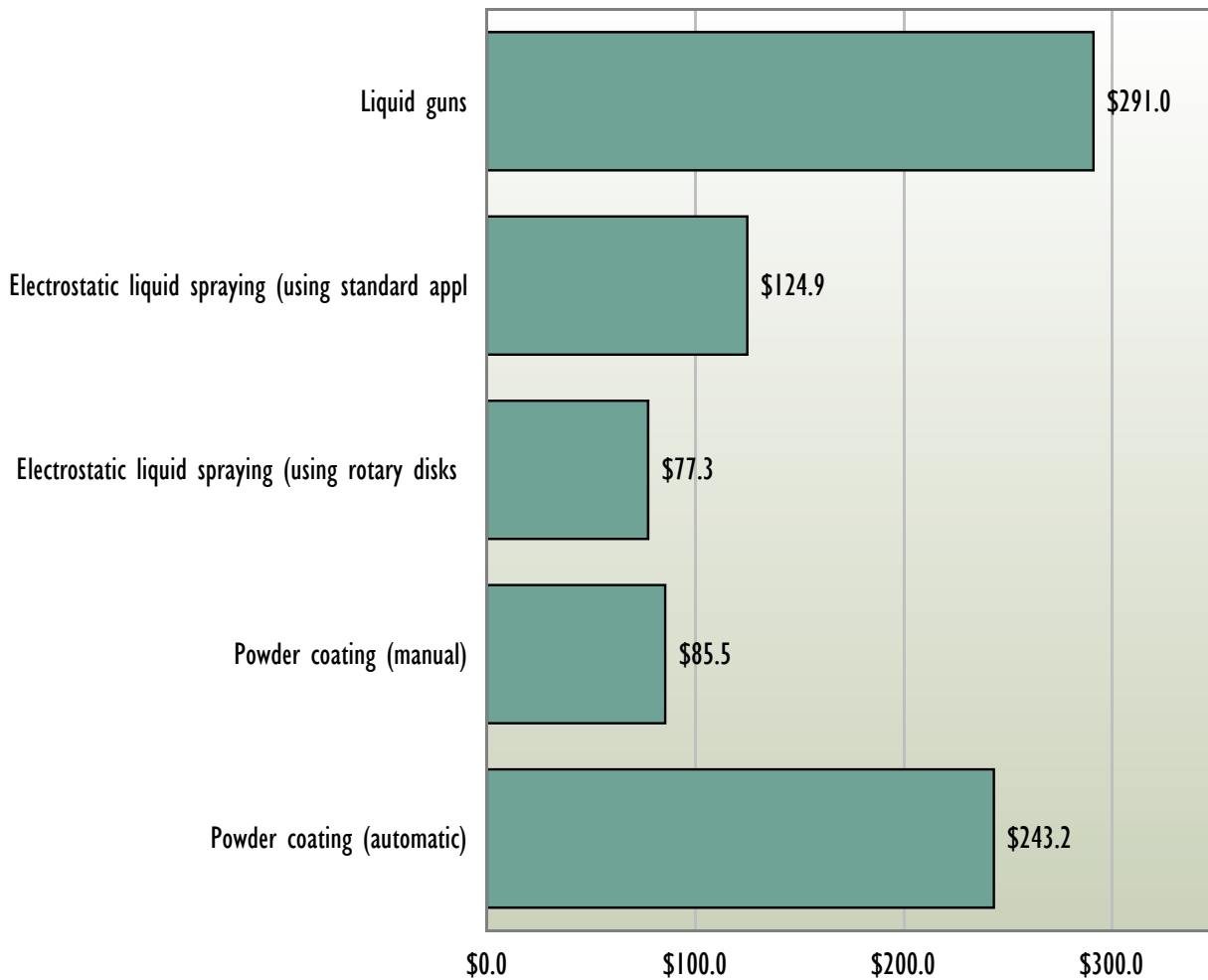


Dollar figures are represented in millions of dollars

## FINISHING Capital Spending Survey & Forecast

### Application Equipment

By Type



Total Projected Spending For Application Equipment is \$821.9 million.

# 2008

## FINISHING Capital Spending Survey & Forecast

### Projected Spending for

# Application Equipment

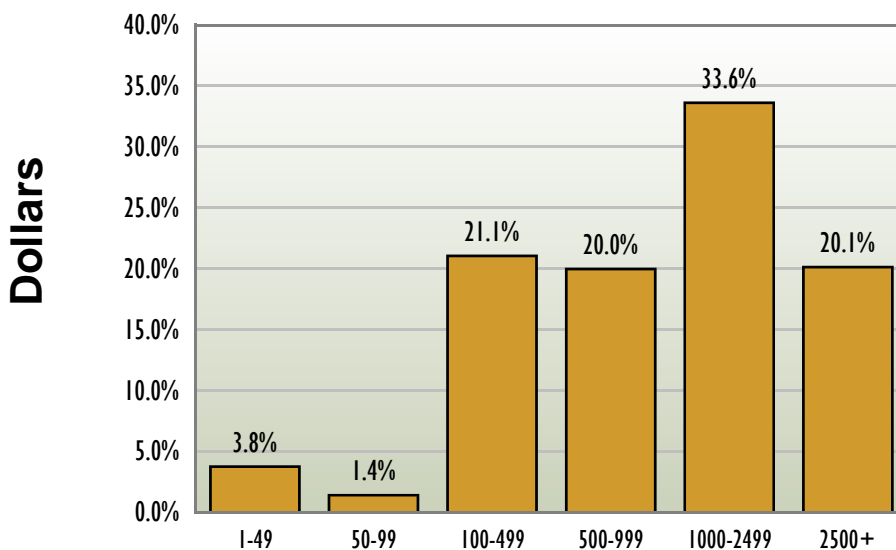
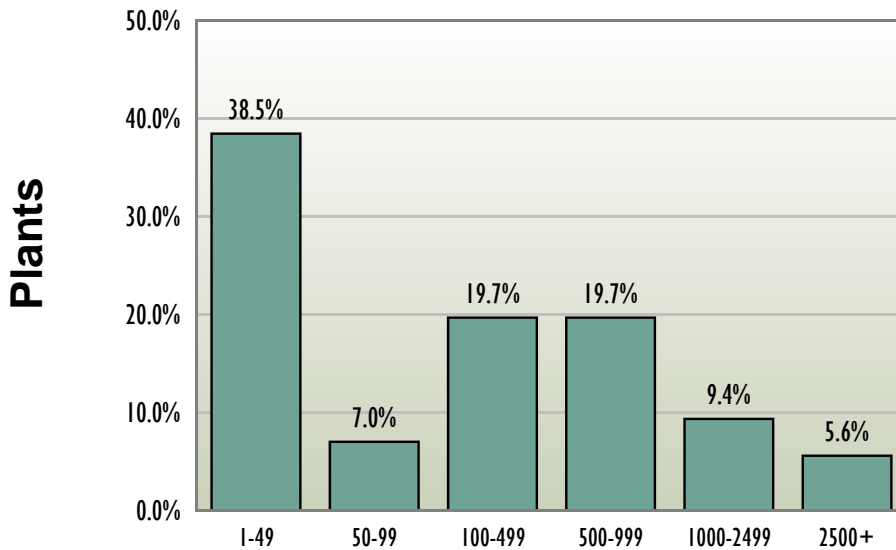
Industry Segment	Dollars
Aerospace	\$254,986,967
Electronics, Computers & Telecom	\$159,884,653
Automotive	\$88,773,667
Machinery Manufacturing	\$71,653,442
Furniture Manufacturing	\$49,831,936
Forming & Fabricating (non-auto)	\$49,174,414
Other Manufacturing	\$37,840,382
HVAC	\$34,002,098
Power Generation	\$23,802,290
Appliances	\$12,468,258
Ship Building	\$9,640,914
Oil & Gas, Mining, Off-Road Construction	\$9,550,505
Metalcutting Job Shops/Screw Machine Products	\$4,701,281
Industrial Motors, Hydraulic & Mechanical Comp.	\$4,051,978
Hardware	\$3,517,742
Pumps, Valves & Plumbing Products	\$2,457,488
Medical	\$2,358,860
Primary Metals	\$1,610,928
Military	\$1,413,672
Petrochemical Processors	\$156,161
<b>Total</b>	<b>\$821,902,292</b>

Plant Size	Dollars
1-49	\$110,792,429
50-99	\$63,286,476
100-499	\$391,143,300
500-999	\$94,272,193
1000-2499	\$90,902,393
2500+	\$71,505,499
<b>Total</b>	<b>\$821,902,292</b>

## FINISHING Capital Spending Survey & Forecast

Plants Planning to Purchase By Plant Size

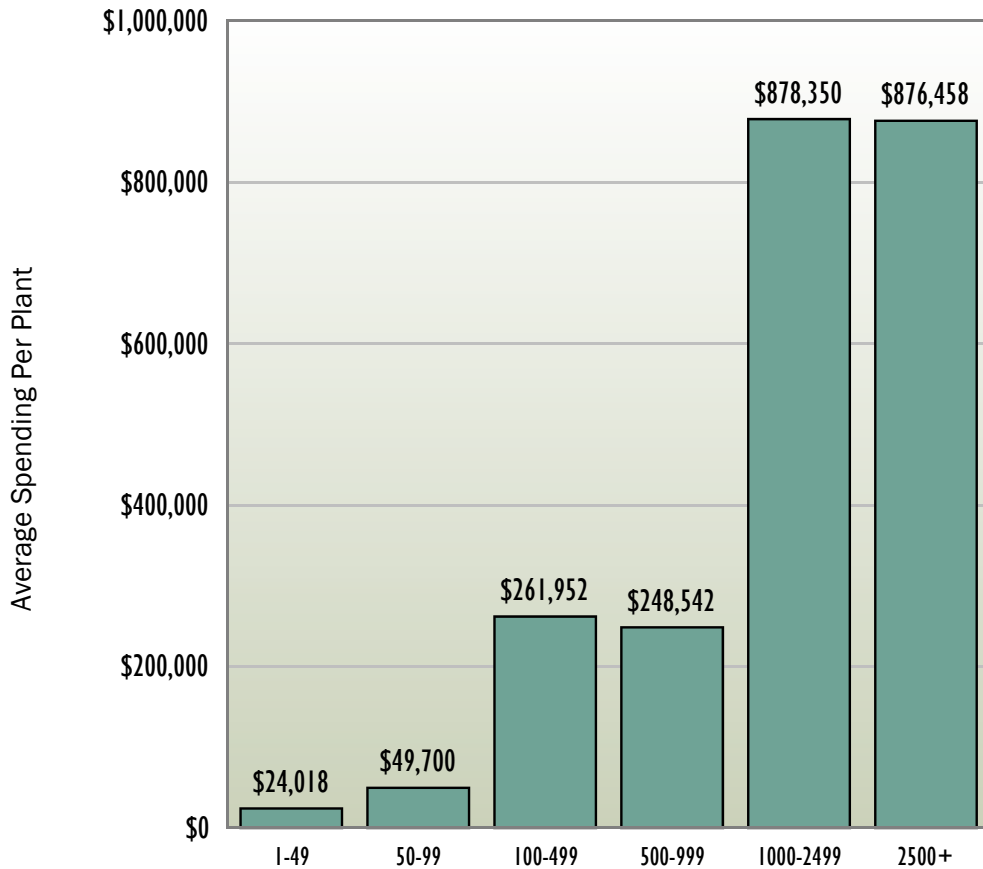
### Application Equipment



## FINISHING Capital Spending Survey & Forecast

### Average Spending Per Plant By Plant Size

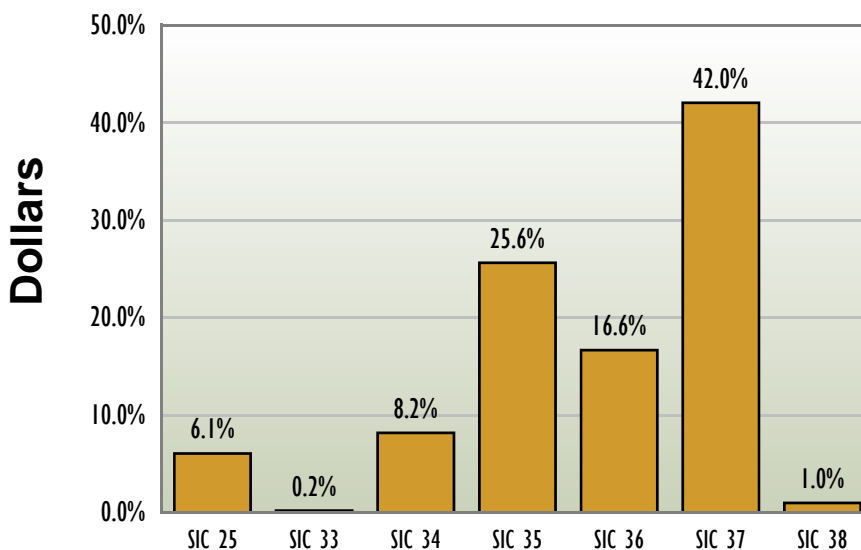
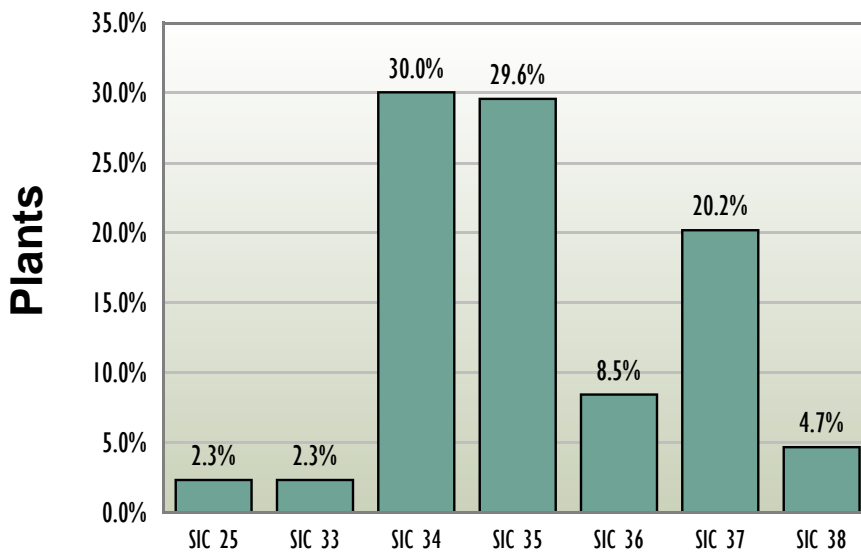
## Application Equipment



## FINISHING Capital Spending Survey & Forecast

Plants Planning to Purchase By 2-Digit SIC

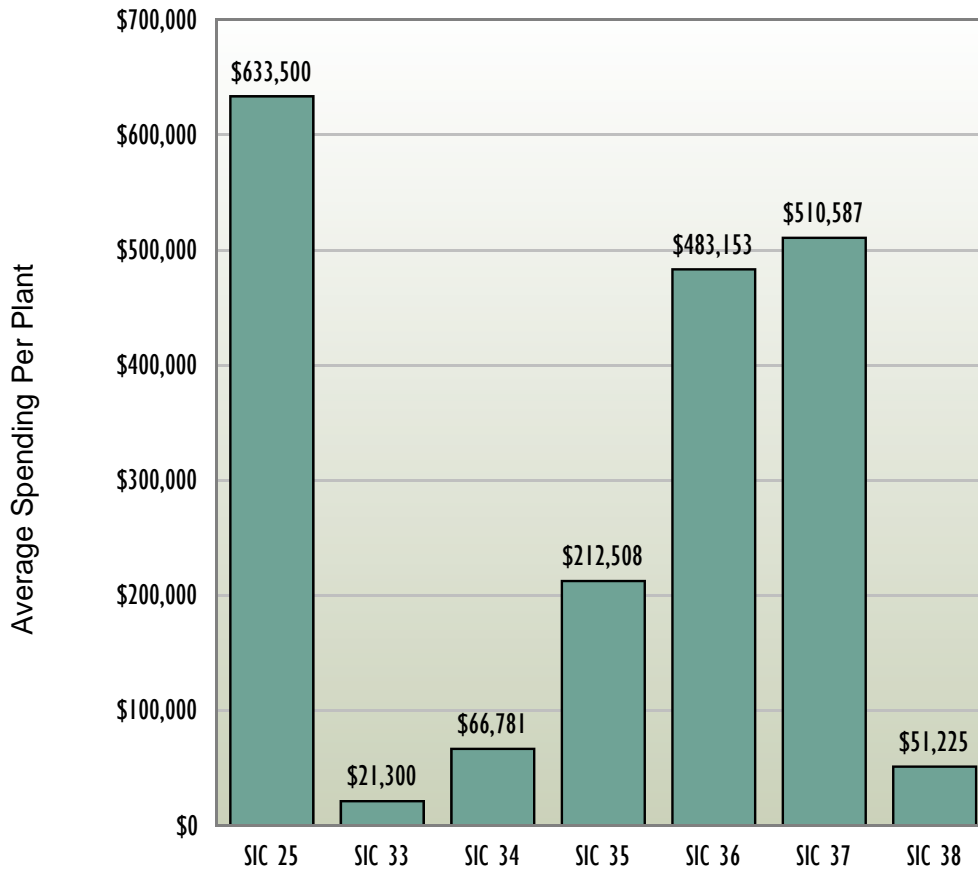
### Application Equipment



## FINISHING Capital Spending Survey & Forecast

Average Spending Per Plant By 2-Digit SIC

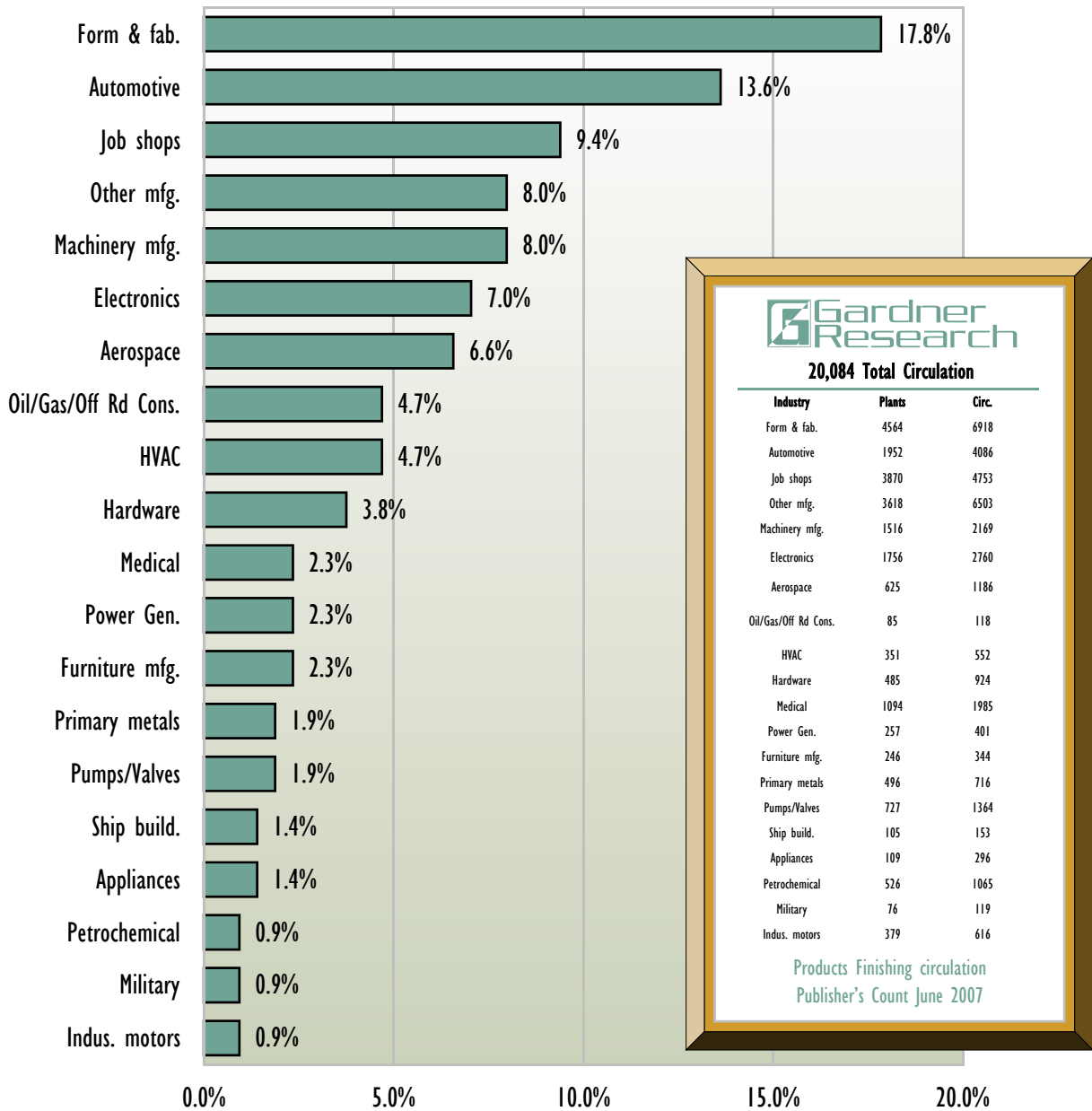
### Application Equipment



## FINISHING Capital Spending Survey & Forecast

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

### Application Equipment

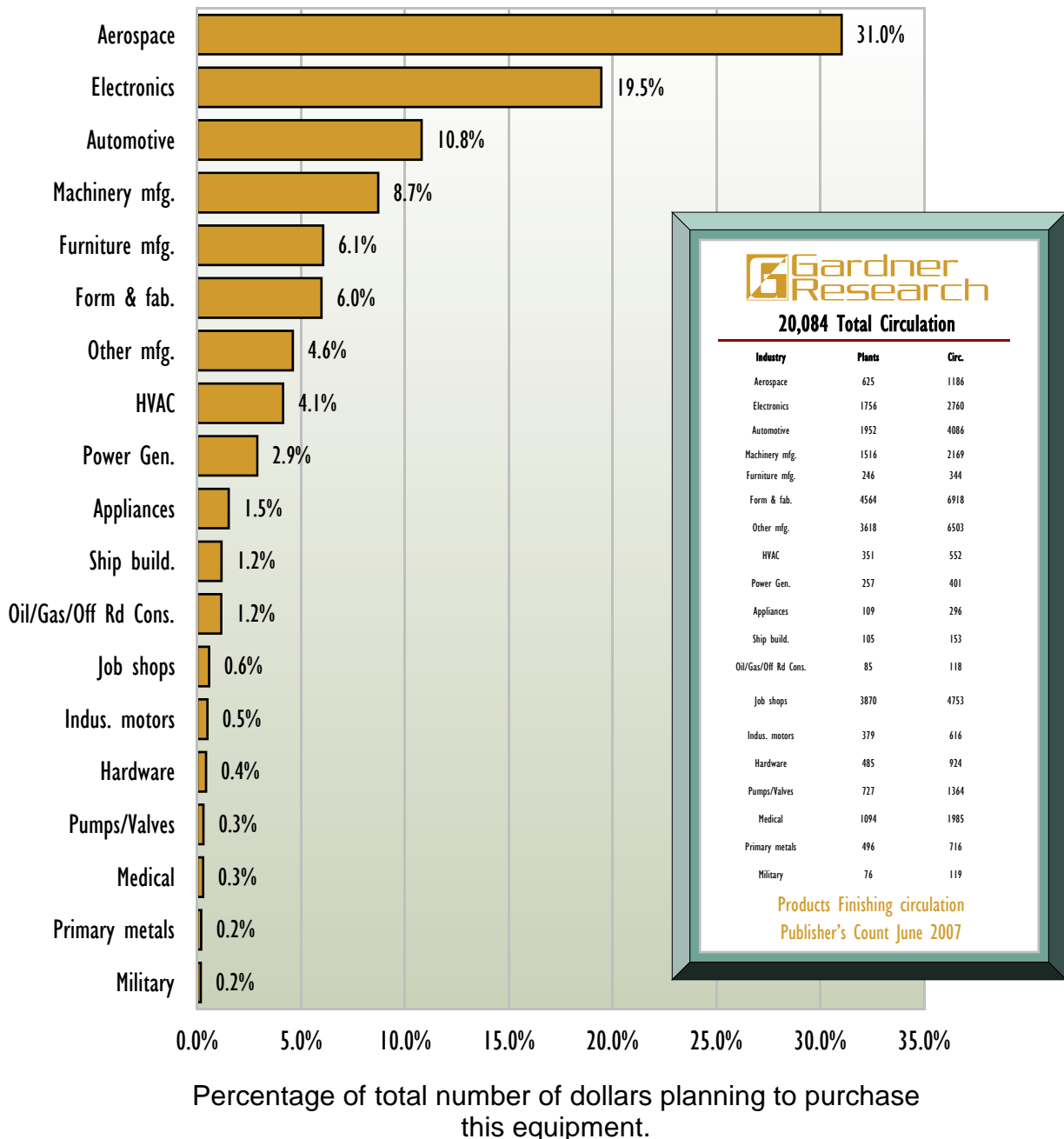


% of total # of plants planning to purchase this equipment.

## FINISHING Capital Spending Survey & Forecast

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

### Application Equipment



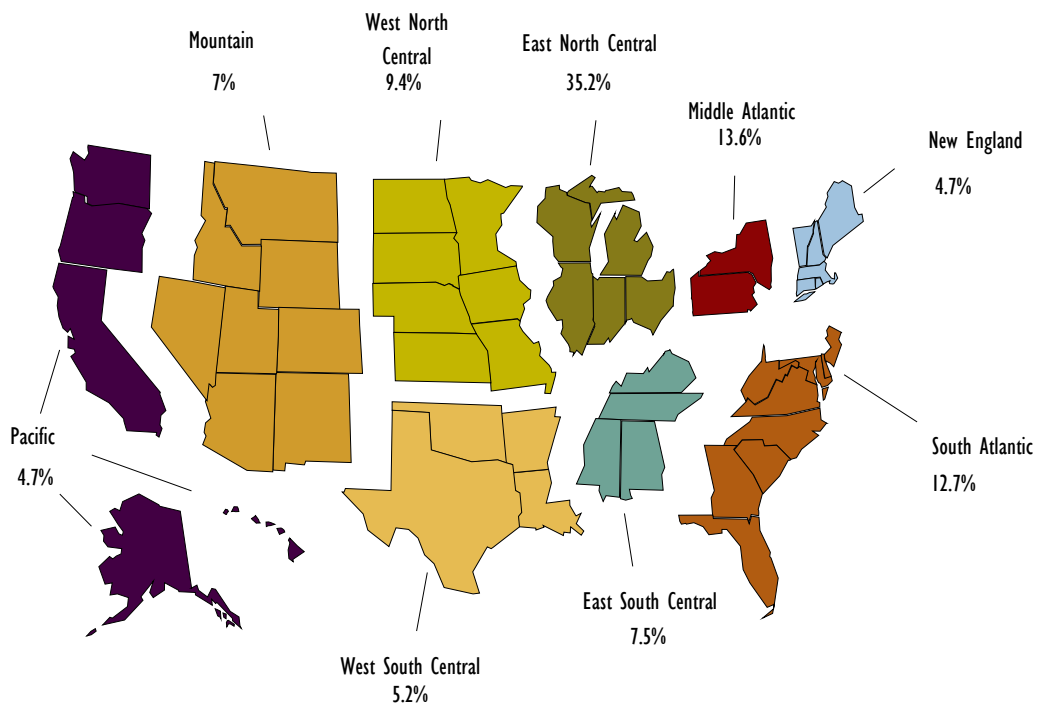
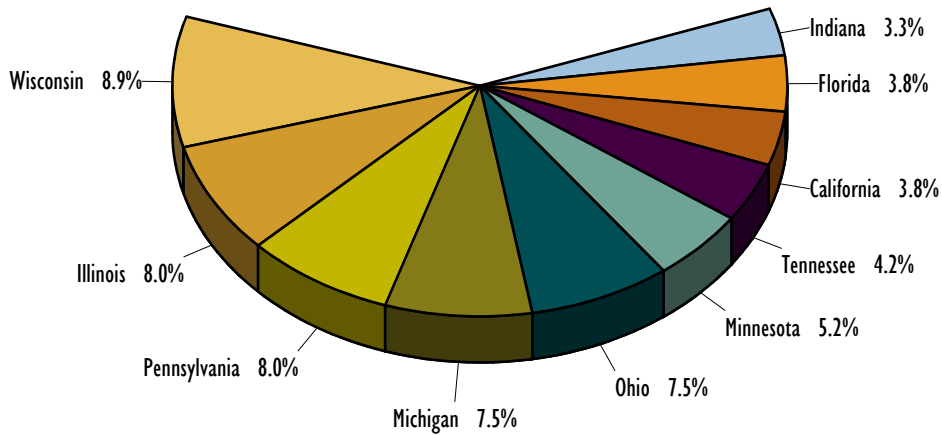
## FINISHING Capital Spending Survey & Forecast

# Application Equipment

### By Number of Plants

The top 5 states represent 39.9% of the plants planning to purchase this type of equipment.

The top 10 states represent 60.1% of the plants planning to purchase this type of equipment.



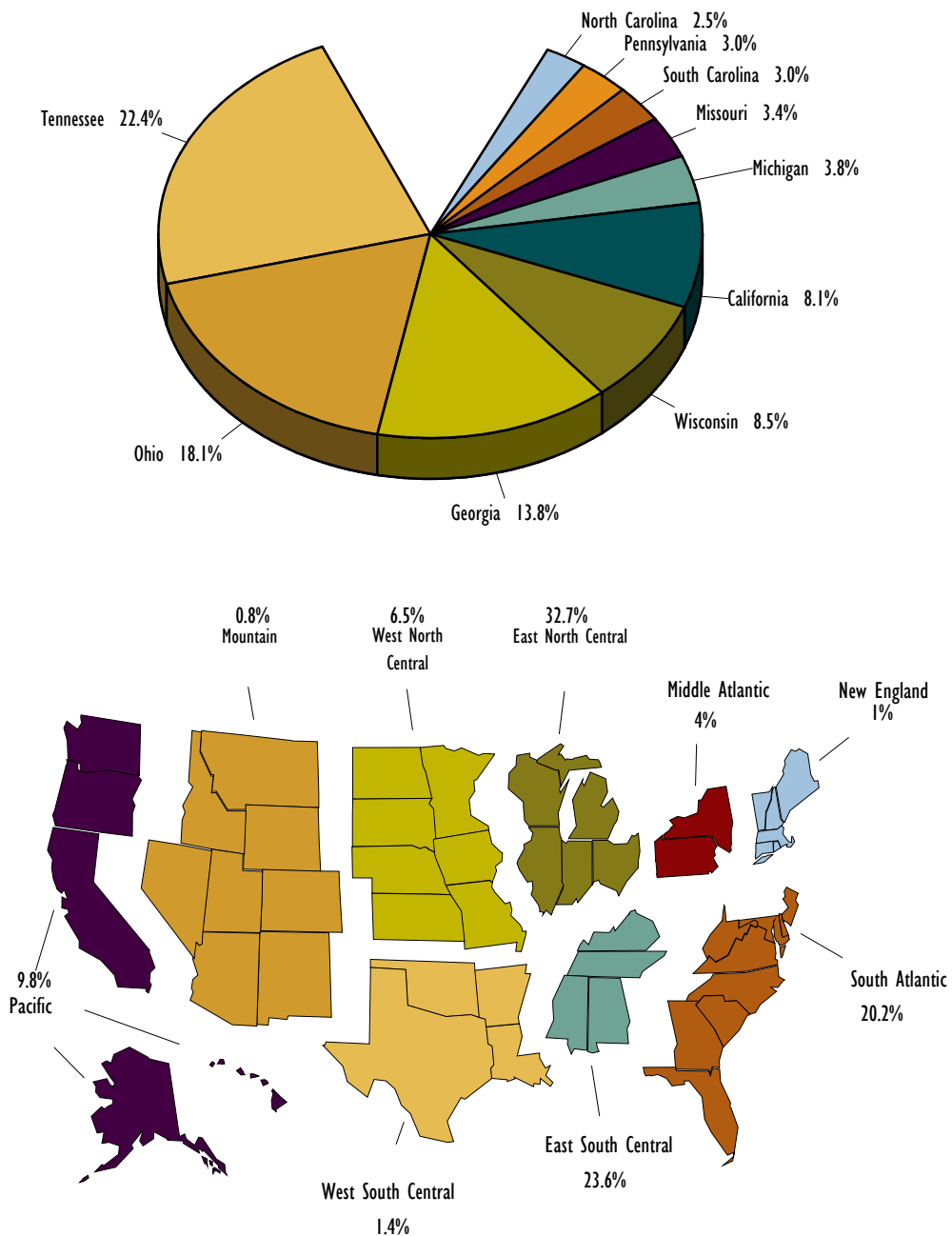
## FINISHING Capital Spending Survey & Forecast

# Application Equipment

### By Dollars

The top 5 states represent 71.0% of the dollars to be spent on this type of equipment.

The top 10 states represent 86.6% of the dollars to be spent on this type of equipment.



## Capital Spending Survey

By

NAICS, Industry Grouping & Plant Size

**For: Application Equipment**

Date: 10/18/07

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

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
334511	Search, Detection, Navigation,	2	0.94							1		1
		158	0.30							135		23
336411	Aircraft Manufacturing	3	1.41			1				1	1	
		6063	11.6			13				1050	5000	
336412	Aircraft Engine and Engine Parts	2	0.94			1			1			
		23	0.05			8			15			
336413	Other Aircraft Parts and Auxiliary	5	2.35						2	2		1
		9905	18.9						150	9740		15
336414	Guided Missile and Space Vehicle	1	0.47									1
		45	0.09									45
336419	Other Guided Missile and Space	1	0.47				1					
		14	0.03				14					
<b>Aerospace</b>		<b>14</b>	<b>6.57</b>			2	1		3	4	1	3
		<b>16208</b>	<b>31.0</b>			21	14		165	10925	5000	83
335211	Electric Housewares and Household	1	0.47						1			
		438	0.84						438			
335222	Household Refrigerator and Home	1	0.47					1				
		30	0.06					30				
335228	Other Major Household Appliance	1	0.47						1			
		325	0.62						325			
<b>Appliances</b>		<b>3</b>	<b>1.41</b>					1	2			
		<b>793</b>	<b>1.52</b>					30	763			
336111	Automobile Manufacturing	3	1.41						1	1	1	
		830	1.59						450	350	30	
336120	Heavy Duty Truck Manufacturing	1	0.47		1							
		8	0.02		8							
336211	Motor Vehicle Body Manufacturing	3	1.41						1	1	1	
		1076	2.05						188	13	875	
336212	Truck Trailer Manufacturing	1	0.47						1			
		20	0.04						20			
336320	Motor Vehicle Electrical and Electronic	1	0.47	1								
		263	0.50	263								
336340	Motor Vehicle Brake System	1	0.47					1				
		25	0.05					25				
336350	Motor Vehicle Transmission and	1	0.47				1					
		1575	3.01				1575					
336370	Motor Vehicle Metal Stamping	1	0.47						1			
		125	0.24						125			
336391	Motor Vehicle Air-Conditioning	2	0.94						1	1		
		163	0.31						98	65		
336399	All Other Motor Vehicle Parts	13	6.10	2			1	3	5	2		
		1533	2.93	31			250	506	376	370		
336991	Motorcycle, Bicycle, and Parts	1	0.47	1								
		5	0.01	5								
336999	All Other Transportation Equipment	1	0.47	1								
		25	0.05	25								
<b>Automotive</b>		<b>29</b>	<b>13.6</b>	5	1		2	4	10	5	2	
		<b>5648</b>	<b>10.8</b>	324	8		1825	531	1257	798	905	
333313	Office Machinery Manufacturing	1	0.47		1							
		56	0.11		56							
334111	Electronic Computer Manufacturing	1	0.47							1		
		3000	5.74							3000		

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
334112	Computer Storage Device	1	0.47							1		
		875	1.67							875		
334210	Telephone Apparatus Manufacturing	2	0.94				1		1			
		38	0.07				23		15			
334220	Radio and Television Broadcasting	1	0.47						1			
		3	0.01						3			
334290	Other Communications Equipment	2	0.94	1				1				
		5005	9.57	5				5000				
334412	Bare Printed Circuit Board	1	0.47						1			
		675	1.29						675			
334416	Electronic Coil, Transformer, and	1	0.47			1						
		53	0.10			53						
334513	Instruments and Related Products	1	0.47								1	
		30	0.06								30	
334516	Analytical Laboratory Instrument	1	0.47				1					
		25	0.05				25					
335121	Residential Electric Lighting Fixture	1	0.47			1						
		23	0.04			23						
335313	Switchgear and Switchboard	1	0.47						1			
		375	0.72						375			
335314	Relay and Industrial Control	1	0.47		1							
		6	0.01		6							
<b>Electronics, Computers &amp; Telecom</b>		<b>15</b>	<b>7.04</b>	1	2	2	2	1	4	3		
		<b>10164</b>	<b>19.4</b>	5	62	76	48	5000	1068	3905		
332116	Metal Stamping	1	0.47	1								
		16	0.03	16								
332311	Prefabricated Metal Building and	1	0.47						1			
		7	0.01						7			
332312	Fabricated Structural Metal	3	1.41		2		1					
		364	0.70		34		330					
332321	Metal Window and Door Manufacturing	1	0.47		1							
		25	0.05		25							
332322	Sheet Metal Work Manufacturing	7	3.29	2	2	2				1		
		1395	2.67	16	20	9				1350		
332323	Ornamental and Architectural Metal	1	0.47		1							
		25	0.05		25							
332618	Other Fabricated Wire Product	2	0.94	1			1					
		275	0.53	25			250					
332811	Metal Heat Treating	1	0.47	1								
		4	0.01	4								
332812	Metal Coating, Engraving (except	19	8.92	11	5	2	1					
		1020	1.98	443	103	463	11					
332999	All Other Miscellaneous Fabricated	2	0.94	1	1							
		3	0.01	3								
<b>Forming &amp; Fabricating (non-auto)</b>		<b>38</b>	<b>17.8</b>	17	12	4	3		1	1		
		<b>3134</b>	<b>6.04</b>	507	207	472	591		7	1350		
337125	Household Furniture (except Wood	1	0.47						1			
		550	1.05						550			
337127	Institutional Furniture Manufacturing	1	0.47				1					
		3	0.01				3					
337211	Wood Office Furniture Manufacturing	1	0.47								1	
		375	0.72								375	
337212	Custom Architectural Woodwork and	1	0.47			1						
		13	0.02			13						

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
337214	Office Furniture (except Wood)	1	0.47						1			
		2228	4.26						2228			
<b>Furniture Manufacturing</b>		<b>5</b>	<b>2.35</b>			1	1		2			1
		<b>3169</b>	<b>6.06</b>			13	3		2778			375
332212	Hand and Edge Tool Manufacturing	3	1.41				2	1				
		53	0.11				8	45				
332510	Hardware Manufacturing	5	2.35	1			2		2			
		172	0.33	9			125		38			
<b>Hardware</b>		<b>8</b>	<b>3.76</b>	<b>1</b>			<b>4</b>	<b>1</b>	<b>2</b>			
		<b>225</b>	<b>0.44</b>	<b>9</b>			<b>133</b>	<b>45</b>	<b>38</b>			
332410	Power Boiler and Heat Exchanger	3	1.41		2	1						
		119	0.23		64	55						
333411	Air Purification Equipment	2	0.94		1		1					
		17	0.03		4		13					
333414	Heating Equipment (except Warm Air	1	0.47						1			
		100	0.19						100			
333415	Air-Conditioning and Warm Air Heating	3	1.41				1	1	1			
		1777	3.41				1750	8	19			
334512	Automatic Environmental Control	1	0.47									1
		150	0.29									150
<b>HVAC</b>		<b>10</b>	<b>4.69</b>		3	1	2	1	2			1
		<b>2163</b>	<b>4.15</b>		68	55	1763	8	119			150
333613	Mechanical Power Transmission	1	0.47				1					
		13	0.02				13					
335312	Motor and Generator Manufacturing	1	0.47					1				
		245	0.47					245				
<b>Industrial Motors, Hydraulic &amp;</b>		<b>2</b>	<b>0.94</b>				<b>1</b>	<b>1</b>				
		<b>258</b>	<b>0.49</b>				<b>13</b>	<b>245</b>				
333210	Sawmill and Woodworking Machinery	1	0.47			1						
		5	0.01			5						
333294	Food Product Machinery	2	0.94		1				1			
		163	0.31		13				150			
333298	All Other Industrial Machinery	2	0.94				1		1			
		18	0.04				8		10			
333319	Other Commercial and Service	1	0.47			1						
		25	0.05			25						
333512	Machine Tool (Metal Cutting Types)	1	0.47						1			
		14	0.03						14			
333513	Machine Tool (Metal Forming Types)	1	0.47		1							
		13	0.02		13							
333922	Conveyor and Conveying Equipment	1	0.47				1					
		150	0.29				150					
333923	Overhead Traveling Crane, Hoist, and	2	0.94	1			1					
		325	0.63	50			275					
333924	Industrial Truck, Tractor, Trailer, and	3	1.41		1		1					1
		3820	7.31		25		45					3750
333993	Packaging Machinery Manufacturing	2	0.94				2					
		10	0.02				10					
333999	All Other Miscellaneous General	1	0.47	1								
		13	0.02	13								

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
<b>Machinery Manufacturing</b>		17	7.98	2	3	2	6		3		1	
		4556	8.73	63	51	30	488		174		3750	
339112	Surgical and Medical Instrument	2	0.94		1					1		
		76	0.15		25					51		
339113	Surgical Appliance and Supplies	2	0.94		1					1		
		44	0.08		6					38		
339114	Dental Equipment and Supplies	1	0.47		1							
		30	0.06		30							
<b>Medical</b>		5	2.35		3					2		
		150	0.29		61					89		
332710	Machine Shops	16	7.51	9	7							
		249	0.50	159	90							
332722	Bolt, Nut, Screw, Rivet, and Washer	1	0.47			1						
		15	0.03			15						
333514	Special Die and Tool, Die Set, Jig, and	3	1.41	1	2							
		39	0.08	25	14							
<b>Metalcutting Job Shops/Screw</b>		20	9.39	10	9	1						
		303	0.61	184	104	15						
332994	Small Arms Manufacturing	1	0.47								1	
		15	0.03								15	
332995	Other Ordnance and Accessories	1	0.47					1				
		75	0.14					75				
<b>Military</b>		2	0.94					1			1	
		90	0.17					75			15	
333111	Farm Machinery and Equipment	3	1.41				2			1		
		105	0.20				30			75		
333112	Lawn and Garden Tractor and Home	4	1.88	1			1		2			
		154	0.29	13			8		133			
333120	Construction Machinery Manufacturing	3	1.41						2	1		
		350	0.67						36	314		
<b>Oil &amp; Gas, Mining, Off-Road</b>		10	4.69	1			3		4	2		
		609	1.16	13			38		169	389		
332813	Electroplating, Plating, Polishing, Anod	8	3.76	4	1	2	1					
		279	0.52	135	60	66	18					
333921	Elevator and Moving Stairway	2	0.94						1		1	
		1960	3.75						1750		210	
336510	Railroad Rolling Stock Manufacturing	2	0.94					1	1			
		28	0.05					13	15			
339920	Sporting and Athletic Goods	3	1.41	2						1		
		90	0.18	40						50		
339999	All Other Miscellaneous Manufacturing	2	0.94	2								
		50	0.10	50								
<b>Other Manufacturing</b>		17	7.98	8	1	2	1	1	2	1	1	
		2407	4.60	225	60	66	18	13	1765	50	210	
325510	Paint and Coating Manufacturing	2	0.94	2								
		11	0.02	11								
<b>Petrochemical Processors</b>		2	0.94	2								
		11	0.02	11								

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
333611	Turbine and Turbine Generator Set	1	0.47									1
		30	0.06									30
335311	Power, Distribution, and Specialty	3	1.41				1	1	1			
		1459	2.80				9	50	1400			
335931	Current-Carrying Wiring Device	1	0.47				1					
		25	0.05				25					
<b>Power Generation</b>		<b>5</b>	<b>2.35</b>				<b>2</b>	<b>1</b>	<b>1</b>			<b>1</b>
		<b>1514</b>	<b>2.91</b>				<b>34</b>	<b>50</b>	<b>1400</b>			<b>30</b>
331316	Aluminum Extruded Product	1	0.47		1							
		25	0.05		25							
331419	Primary Smelting and Refining of	1	0.47						1			
		64	0.12						64			
331511	Iron Foundries	2	0.94						2			
		14	0.02						14			
<b>Primary Metals</b>		<b>4</b>	<b>1.88</b>		<b>1</b>				<b>3</b>			
		<b>103</b>	<b>0.19</b>		<b>25</b>				<b>78</b>			
332912	Fluid Power Valve and Hose Fitting	1	0.47				1					
		19	0.04				19					
332996	Fabricated Pipe and Pipe Fitting	1	0.47							1		
		38	0.07							38		
333911	Pump and Pumping Equipment	1	0.47				1					
		18	0.03				18					
333912	Air and Gas Compressor	1	0.47				1					
		83	0.16				83					
<b>Pumps, Valves &amp; Plumbing Products</b>		<b>4</b>	<b>1.88</b>				<b>3</b>				<b>1</b>	
		<b>158</b>	<b>0.30</b>				<b>120</b>				<b>38</b>	
336611	Ship Building and Repairing	1	0.47						1			
		513	0.98						513			
336612	Boat Building	2	0.94						1	1		
		100	0.19						75	25		
<b>Ship Building</b>		<b>3</b>	<b>1.41</b>						<b>2</b>	<b>1</b>		
		<b>613</b>	<b>1.17</b>						<b>588</b>	<b>25</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>	213	100.00	47	35	15	31	11	42	20	9	3
	52276	100.00	1341	646	748	5088	5922	10444	17569	10435	83

**Application Equipment  
- Geographical Summary -**

<b>State</b>	<b>Plants</b>	<b>Percent</b>	<b>Budget</b>	<b>Percent</b>
Connecticut	4	1.88	482	0.92
Massachusetts	3	1.41	12	0.03
New Hampshire	1	0.47	23	0.04
Rhode Island	1	0.47	18	0.03
Vermont	1	0.47	13	0.02
<b>New England</b>	<b>10</b>	<b>4.69 %</b>	<b>548</b>	<b>1.04 %</b>
New Jersey	6	2.82	125	0.25
New York	6	2.82	358	0.69
Pennsylvania	17	7.98	1,586	3.04
<b>Mid-Atlantic</b>	<b>29</b>	<b>13.62 %</b>	<b>2,069</b>	<b>3.98 %</b>
Illinois	17	7.98	622	1.22
Indiana	7	3.29	615	1.16
Michigan	16	7.51	1,966	3.79
Ohio	16	7.51	9,476	18.12
Wisconsin	19	8.92	4,422	8.47
<b>E. N. Central</b>	<b>75</b>	<b>35.21 %</b>	<b>17,101</b>	<b>32.76 %</b>
Iowa	4	1.88	366	0.70
Kansas	2	0.94	7	0.02
Minnesota	11	5.16	1,231	2.35
Missouri	1	0.47	1,750	3.35
North Dakota	1	0.47	8	0.02
South Dakota	1	0.47	14	0.03
<b>W. N. Central</b>	<b>20</b>	<b>9.39 %</b>	<b>3,376</b>	<b>6.47 %</b>
Florida	8	3.76	191	0.36
Georgia	3	1.41	7,233	13.83
Maryland	1	0.47	3	0.01
North Carolina	7	3.29	1,304	2.50
South Carolina	3	1.41	1,589	3.03
Virginia	4	1.88	250	0.48
West Virginia	1	0.47	3	0.01
<b>S. Atlantic</b>	<b>27</b>	<b>12.68 %</b>	<b>10,573</b>	<b>20.22 %</b>
Alabama	4	1.88	576	1.10
Kentucky	2	0.94	28	0.05
Mississippi	1	0.47	20	0.04
Tennessee	9	4.23	11,722	22.43
<b>E. S. Central</b>	<b>16</b>	<b>7.51 %</b>	<b>12,346</b>	<b>23.62 %</b>
Arkansas	2	0.94	100	0.19
Louisiana	1	0.47	25	0.05
Oklahoma	1	0.47	3	0.01
Texas	7	3.29	608	1.16
<b>W. S. Central</b>	<b>11</b>	<b>5.16 %</b>	<b>736</b>	<b>1.41 %</b>
Arizona	6	2.82	82	0.17
Colorado	5	2.35	206	0.40
New Mexico	1	0.47	38	0.07
Utah	3	1.41	97	0.18
<b>Mountain</b>	<b>15</b>	<b>7.04 %</b>	<b>423</b>	<b>0.82 %</b>
California	8	3.76	4,219	8.08
Oregon	1	0.47	675	1.29
Washington	1	0.47	210	0.40
<b>Pacific</b>	<b>10</b>	<b>4.69 %</b>	<b>5,104</b>	<b>9.77 %</b>

**Total Plants**

**213**

**Total Dollars**

**52,276**