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**2008**

# **Capital Spending Survey & Forecast**

**• Machine Tools • Assembly • Gaging • Material Handling • Welding •  
Plastic Molding • Finishing Equipment**

**Plants Planning to Purchase**

**Machining Center, horizontal -- 400  
mm pallet or below**

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 **Gardner  
Research**

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# 2008

## Capital Spending Survey & Forecast

### Table of Contents

Projected Spending By Equipment Type	3
Projected Spending By Machine Type	4
Projected Spending for New, Used and Rebuilt Equipment	5
Actual Spending By Plant Size	6
Actual Average Spending By Plant Size	7
Actual Spending By 2-Digit SIC	8
Actual Average Spending By 2-Digit SIC	9
Actual Number of Plants Planning To Purchase By Industry Segment	10
Actual Dollar Volume of Plants Planning To Purchase By Industry Segment	11
Actual Number of Plants Planning To Purchase By State	12
Actual Dollar Volume of Plants Planning To Purchase By State	13
Actual 4-Digit SIC & Geographical Summary	14

#### 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:

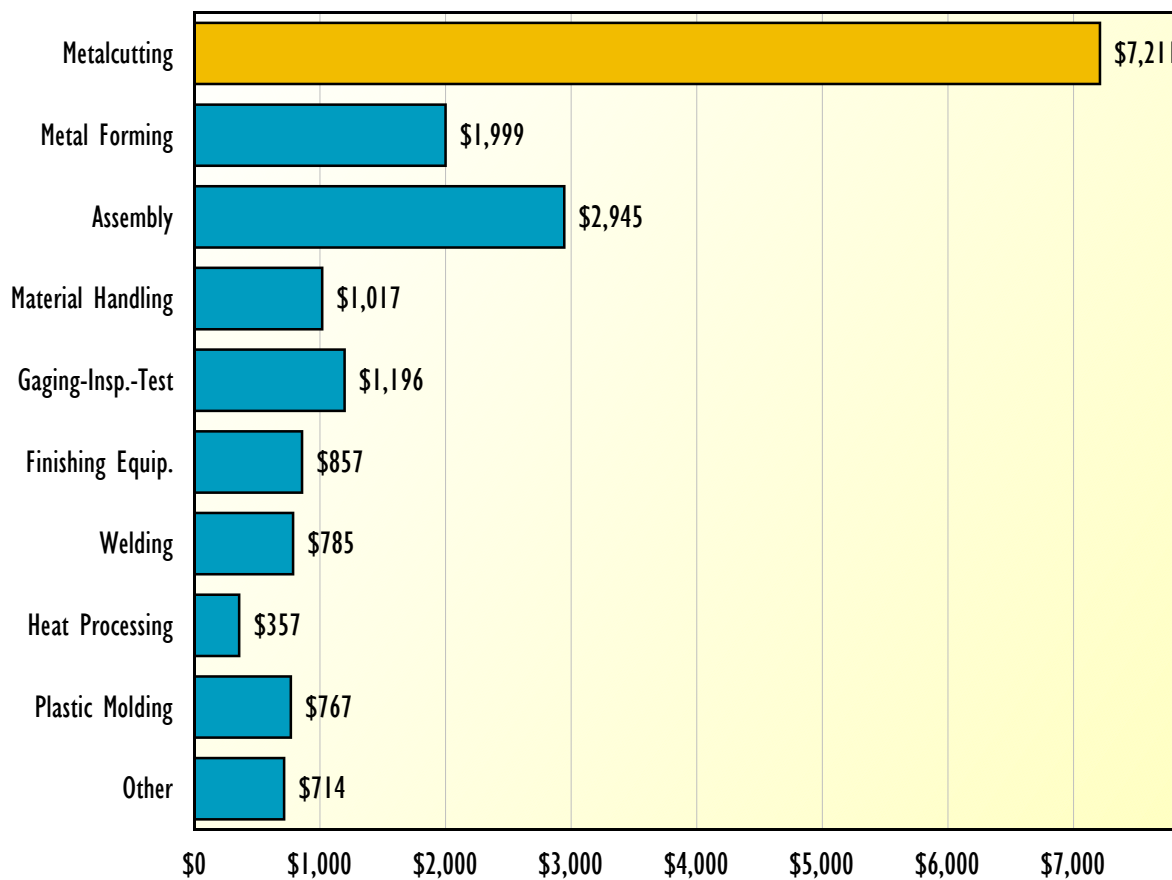
The projections represented in this report are based on surveys returned. Caution should be used when reviewing this report. Projections based on a small number of survey returns may be quite variable and could be misinterpreted.

# 2008

## Capital Spending Survey & Forecast

### Projected Equipment Expenditures

### By Type of Equipment



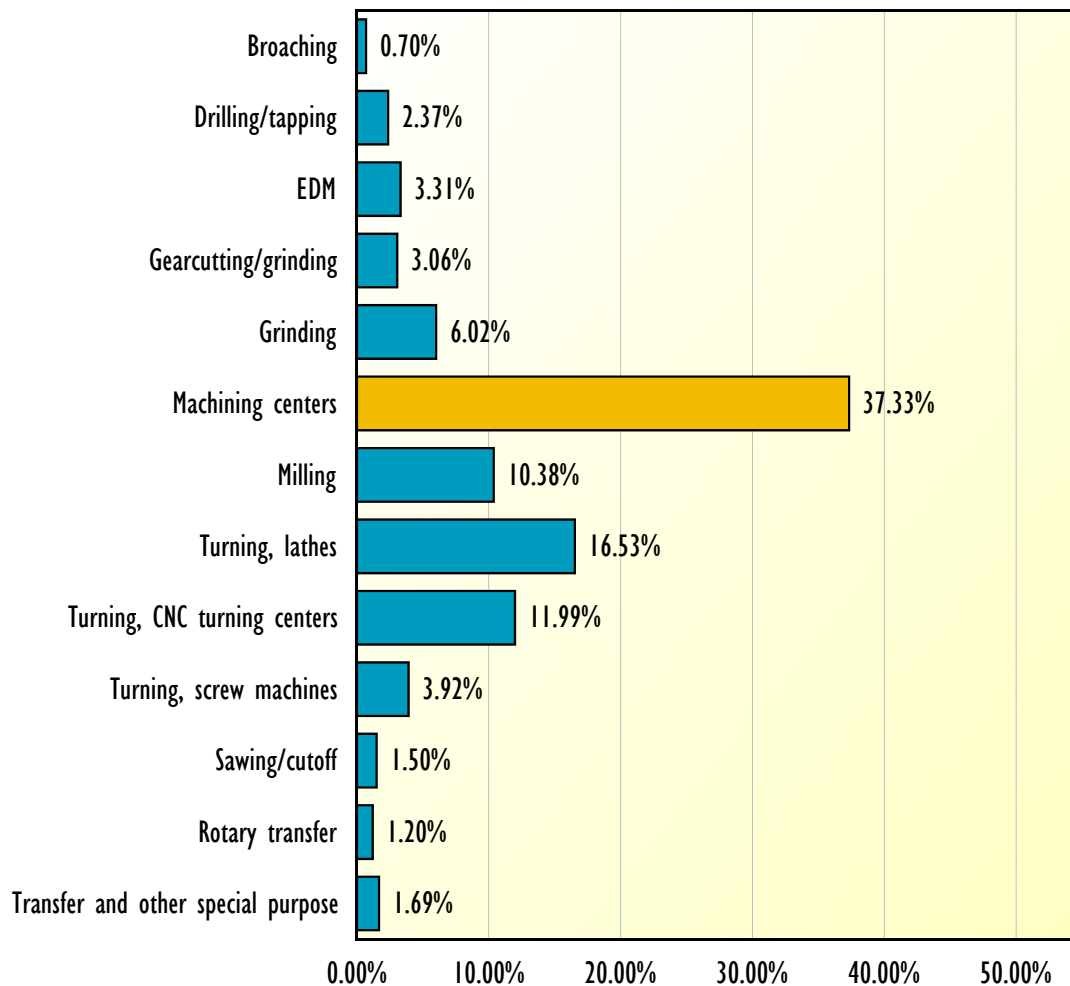
Dollar figures are represented in millions of dollars

# 2008

## Capital Spending Survey & Forecast

### Overall Metalcutting Equipment

#### By Machine Type



**Total Projected Spending For Metalcutting Equipment is \$7,211 million.**

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## Capital Spending Survey & Forecast

**Projected Spending for New, Used & Rebuilt Equipment**

**Machining Center, horizontal -- 400 mm pallet or below**

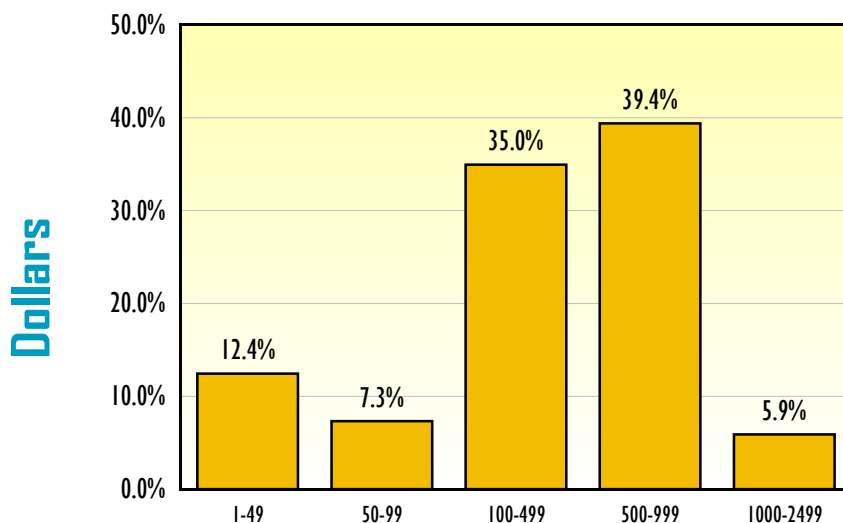
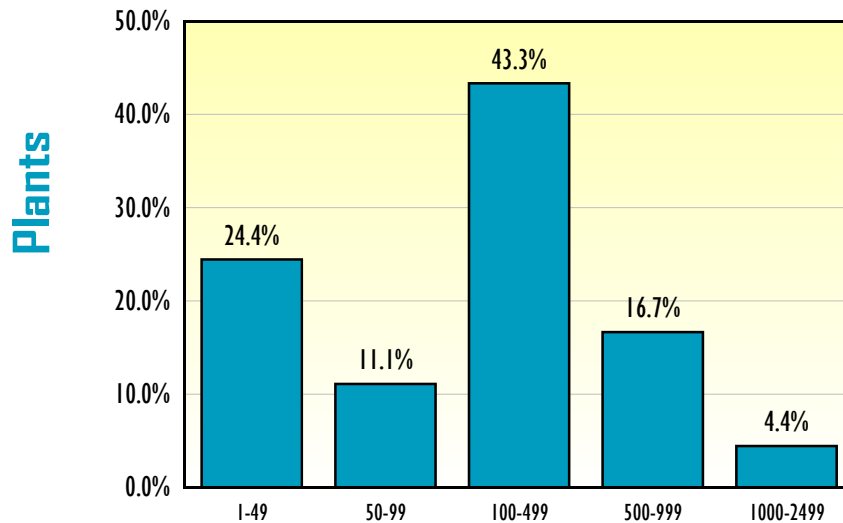
Industry Segment	Dollars
Metalcutting Job Shops/Screw Machine Products	\$83,147,313
Oil & Gas, Mining, Off-Road Construction	\$64,411,148
Automotive	\$55,150,232
Machinery Manufacturing	\$51,479,801
Military	\$42,281,398
Pumps, Valves & Plumbing Products	\$41,647,333
Industrial Motors, Hydraulic & Mechanical Comp.	\$35,980,938
Aerospace	\$33,685,803
Electronics, Computers & Telecom	\$11,239,020
Medical	\$9,028,724
Forming & Fabricating (non-auto)	\$6,947,920
Other Manufacturing	\$4,688,506
Primary Metals	\$3,732,944
Hardware	\$3,098,880
<b>Total</b>	<b>\$446,524,425</b>

Plant Size	Dollars
1-49	\$179,949,343
50-99	\$85,732,690
100-499	\$92,475,208
500-999	\$76,578,939
1000-2499	\$11,788,245
2500+	\$21,304,989
<b>Total</b>	<b>\$446,524,425</b>

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## Capital Spending Survey & Forecast

**Plants Planning to Purchase By Plant Size**  
**Machining Center, horizontal -- 400 mm pallet or below**

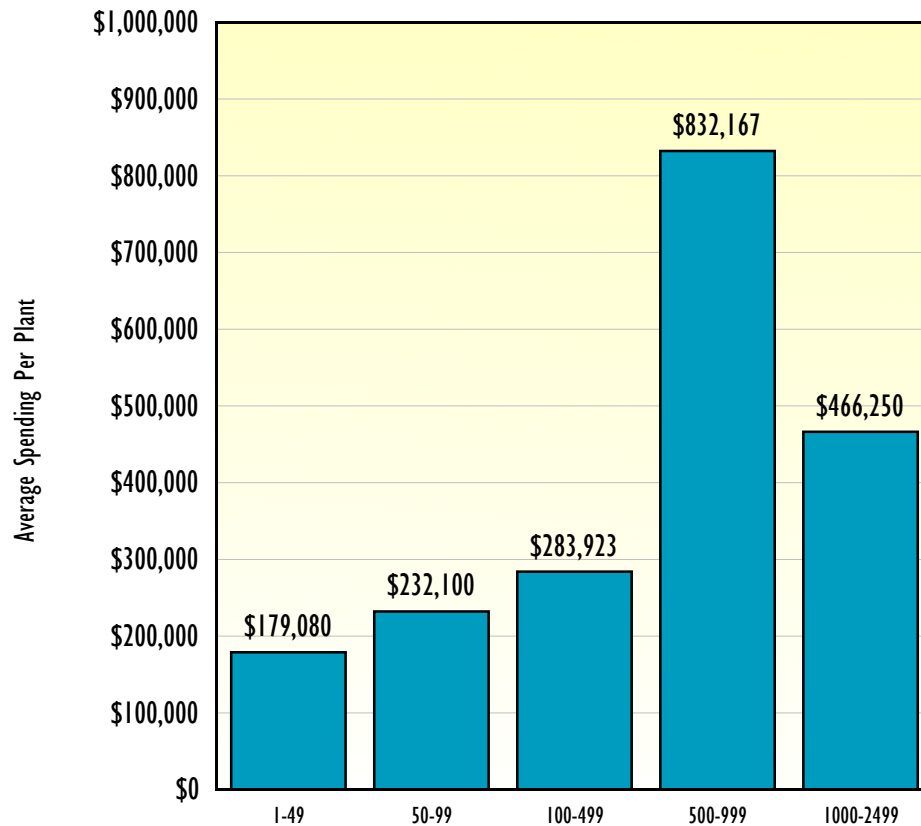


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## Capital Spending Survey & Forecast

Average Spending Per Plant By Plant Size

Machining Center, horizontal -- 400 mm pallet or below

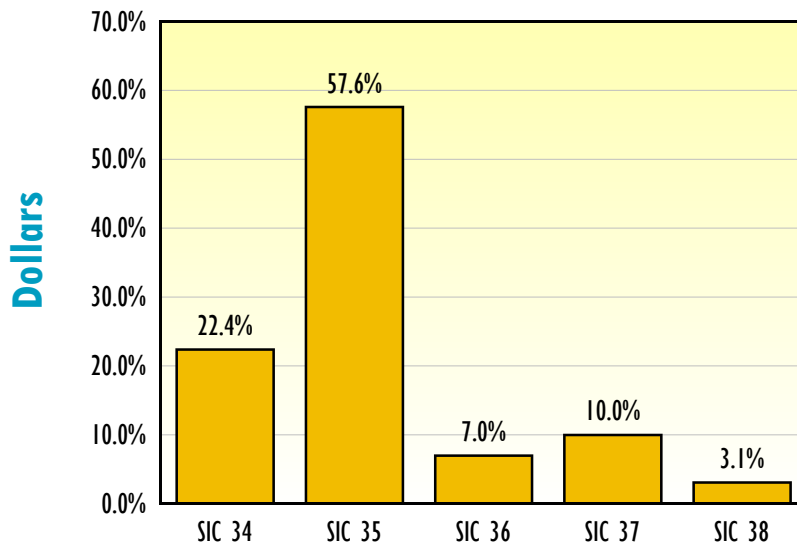
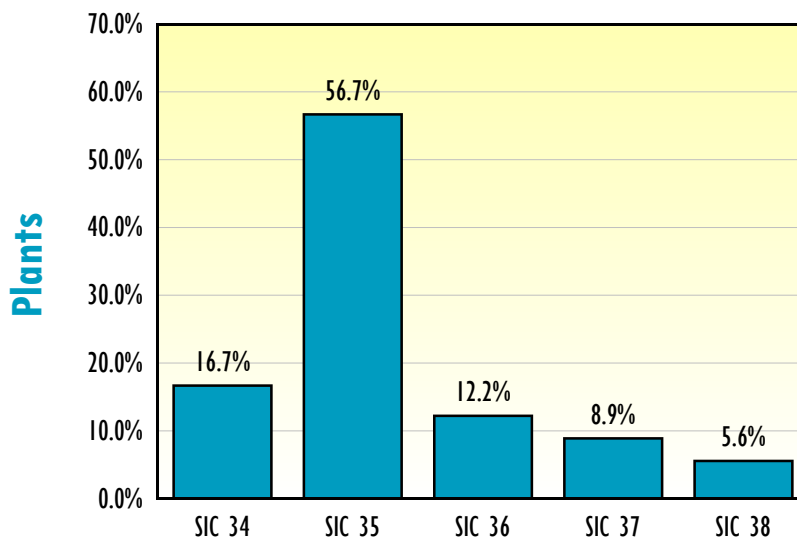


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## Capital Spending Survey & Forecast

Plants Planning to Purchase By 2-Digit SIC

Machining Center, horizontal -- 400 mm pallet or below

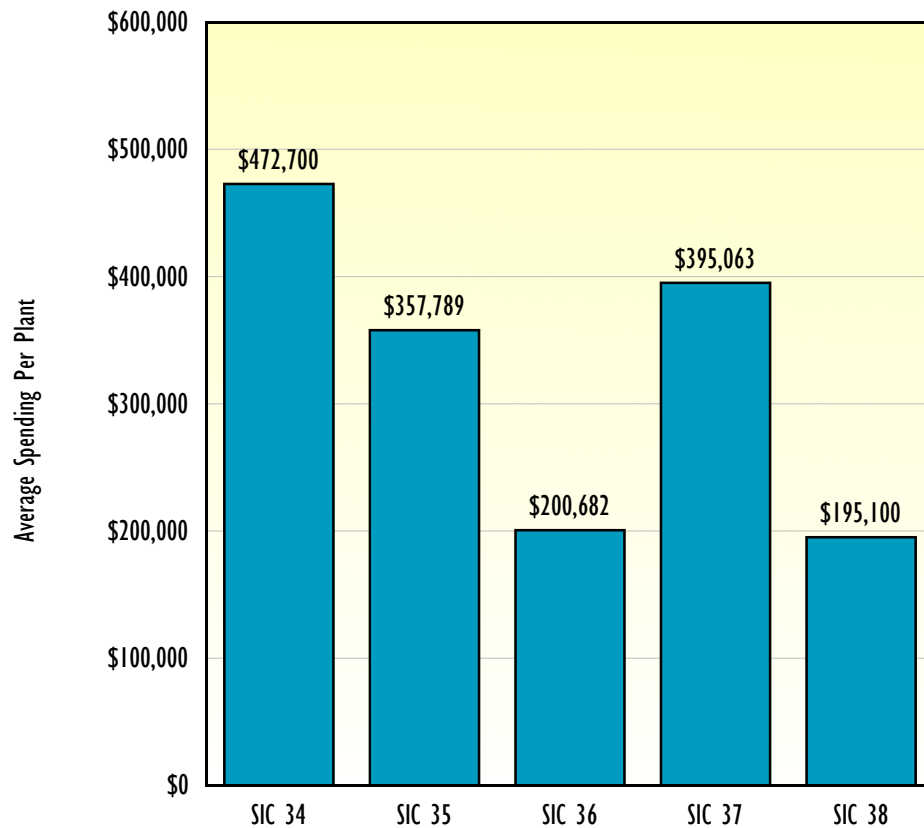


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## Capital Spending Survey & Forecast

Average Spending Per Plant By 2-Digit SIC

Machining Center, horizontal -- 400 mm pallet or below

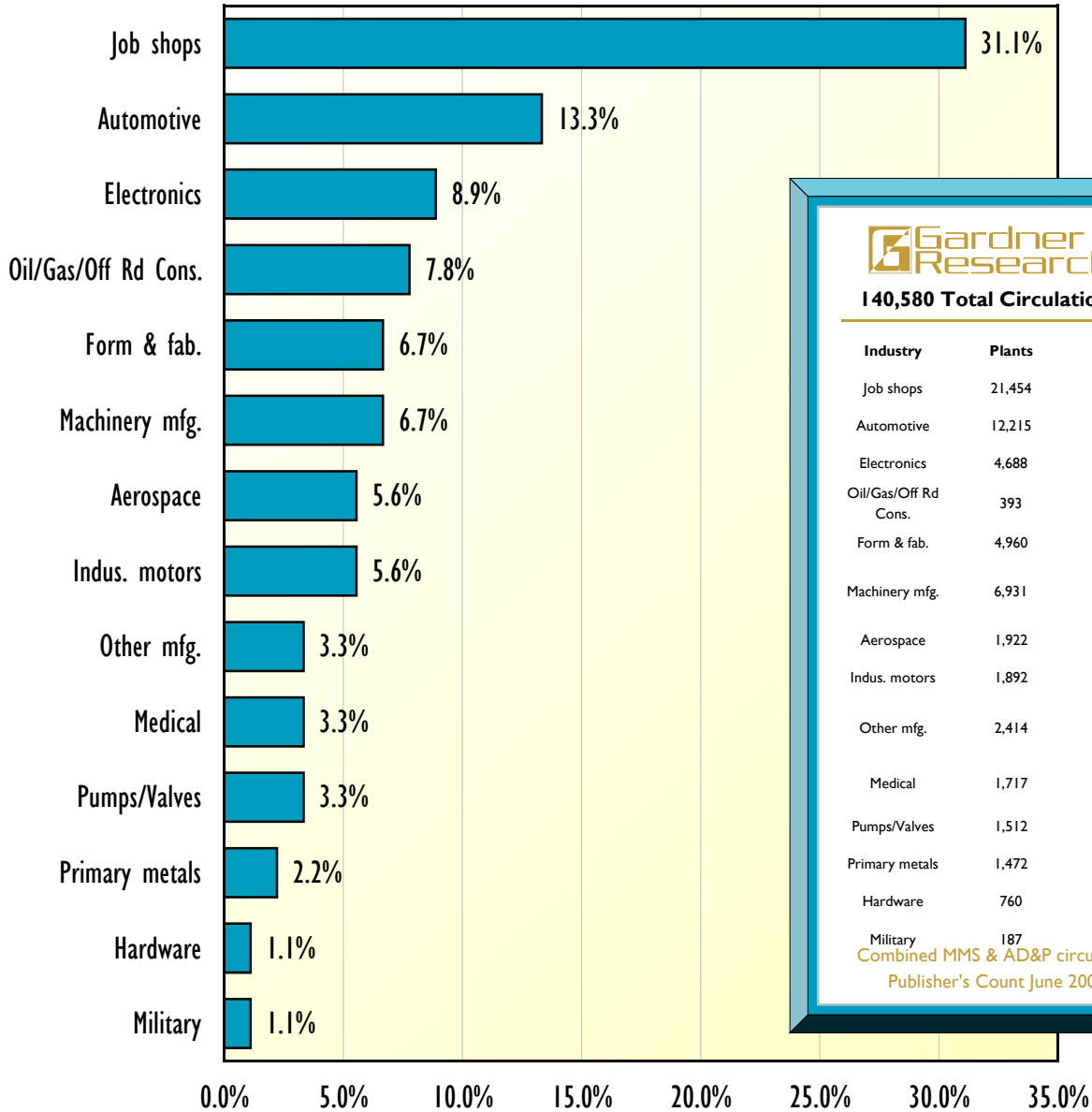


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## Capital Spending Survey & Forecast

Top Industry Segments: By Number of Plants For Plants Planning to Purchase

### Machining Center, horizontal -- 400 mm pallet or below



**Gardner Research**  
**140,580 Total Circulation**

Industry	Plants	Circ.
Job shops	21,454	36,283
Automotive	12,215	42,210
Electronics	4,688	8,939
Oil/Gas/Off Rd Cons.	393	823
Form & fab.	4,960	8,188
Machinery mfg.	6,931	13,366
Aerospace	1,922	5,069
Indus. motors	1,892	5,142
Other mfg.	2,414	4,540
Medical	1,717	4,782
Pumps/Valves	1,512	3,704
Primary metals	1,472	3,148
Hardware	760	1,796
Military	187	423

Combined MMS & AD&P circulation.  
 Publisher's Count June 2007.

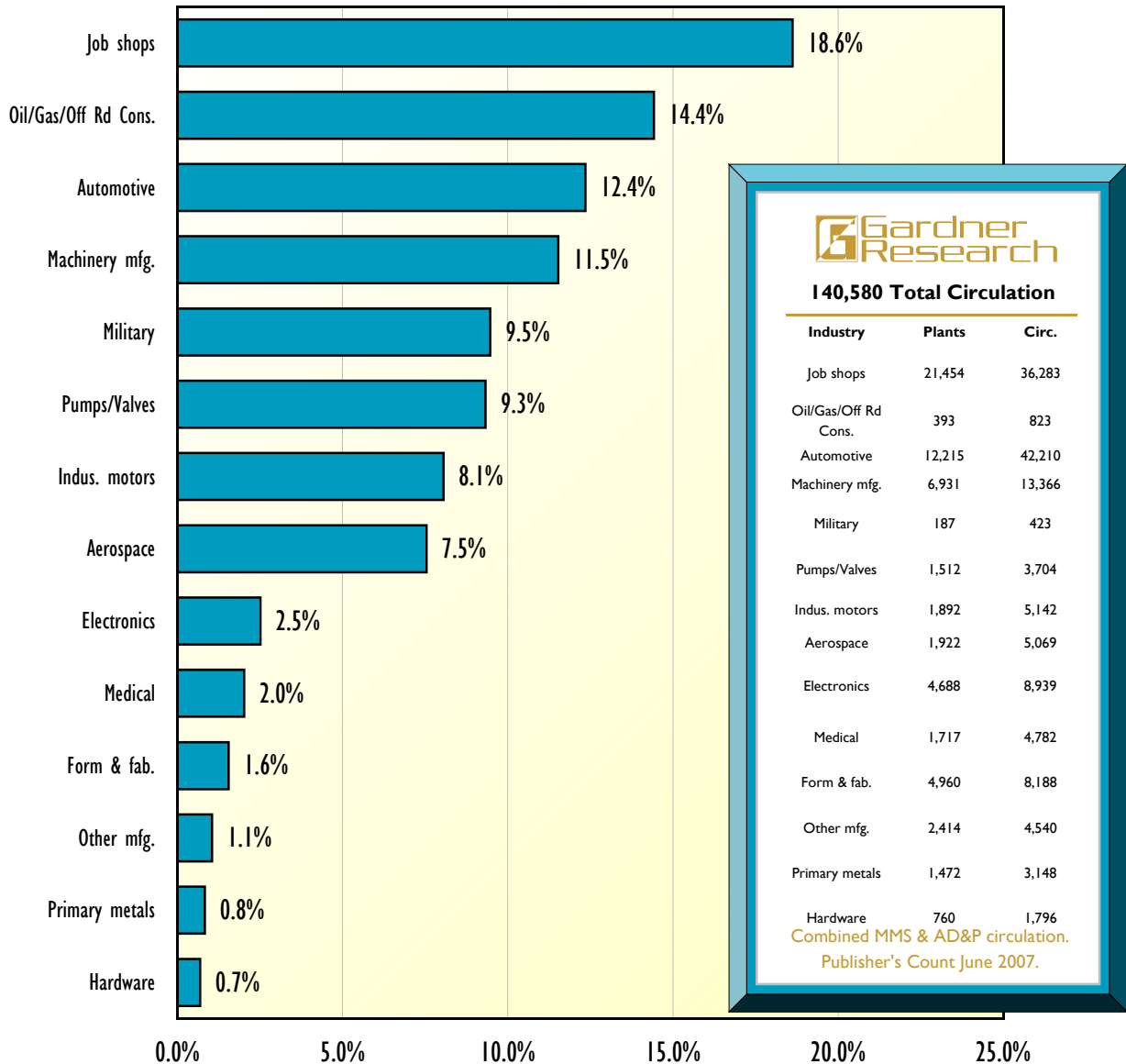
Percentage of total number of plants planning to purchase this equipment.

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## Capital Spending Survey & Forecast

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

Machining Center, horizontal -- 400 mm pallet or below



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

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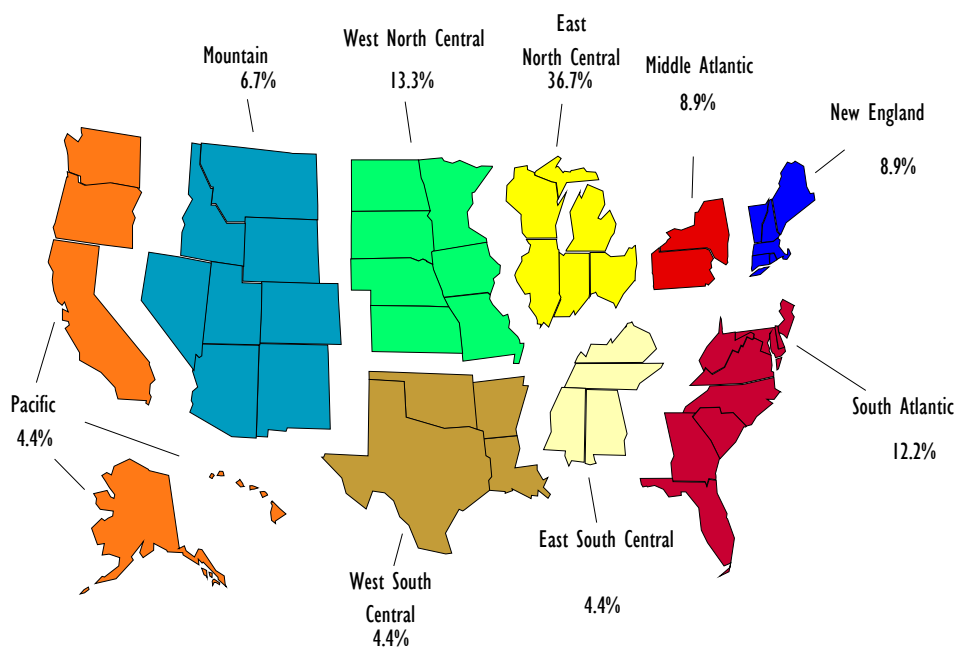
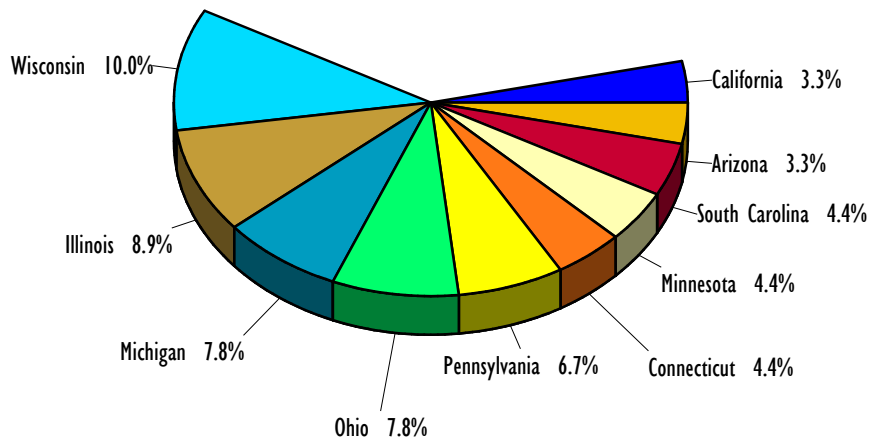
## Capital Spending Survey & Forecast

### Machining Center, horizontal -- 400 mm pallet or below

#### By Number of Plants

The top 5 states represent 41.1% of the plants planning to purchase this type of equipment.

The top 10 states represent 61.1% of the plants planning to purchase this type of equipment.



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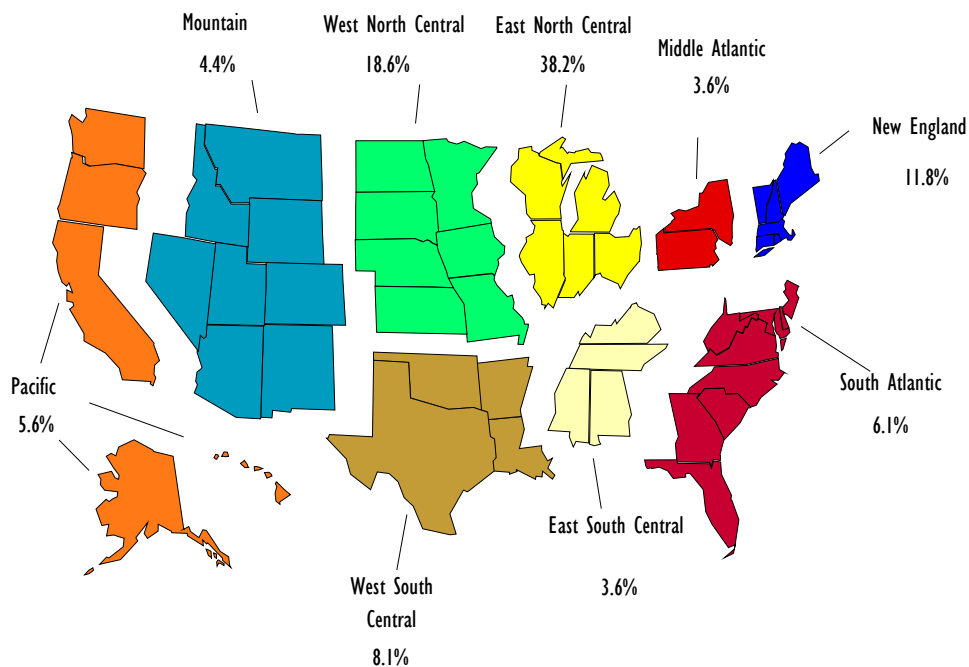
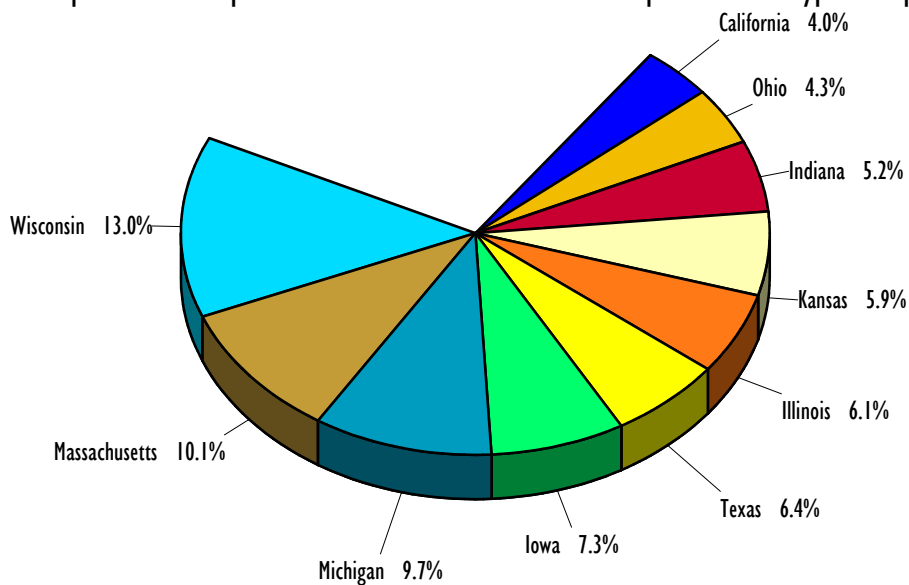
## Capital Spending Survey & Forecast

### Machining Center, horizontal -- 400 mm pallet or below

#### By Dollars

The top 5 states represent 46.5% of the dollars to be spent on this type of equipment.

The top 10 states represent 71.9% of the dollars to be spent on this type of equipment.



**AUTOMOTIVE DESIGN**  
*and* **PRODUCTION**

and

**Modern  
Machine  
Shop** Magazines

6915 Valley Ave, Cincinnati, Ohio 45244

**2008 Capital Equipment Spending Survey -- A Confidential Study**

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## Capital Spending Survey

By

NAICS, Industry Grouping & Plant Size

**For: Machining Center, horizontal -- 400 mm pallet or b**

Date: 09/27/07

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	2.22					1		1		
		365	1.15					90		275		
336410	Aerospace Product and Parts	1	1.11						1			
		1225	3.86						1225			
336412	Aircraft Engine and Engine Parts	1	1.11	1								
		100	0.32	100								
336413	Other Aircraft Parts and Auxiliary	1	1.11					1				
		700	2.21					700				
<b>Aerospace</b>		<b>5</b>	<b>5.56</b>	<b>1</b>				<b>2</b>	<b>1</b>	<b>1</b>		
		<b>2390</b>	<b>7.54</b>	<b>100</b>				<b>790</b>	<b>1225</b>	<b>275</b>		
336111	Automobile Manufacturing	1	1.11								1	
		403	1.27								403	
336212	Truck Trailer Manufacturing	1	1.11					1				
		3	0.01					3				
336311	Carburetor, Piston, Piston Ring, and	1	1.11					1				
		120	0.38					120				
336312	Gasoline Engine and Engine Parts	2	2.22					1	1			
		1438	4.54					563	875			
336321	Vehicular Lighting Equipment	1	1.11					1				
		60	0.19					60				
336350	Motor Vehicle Transmission and	1	1.11			1						
		525	1.66			525						
336399	All Other Motor Vehicle Parts	5	5.56				1	2	1	1		
		1365	4.31				110	545	85	625		
<b>Automotive</b>		<b>12</b>	<b>13.3</b>			<b>1</b>	<b>1</b>	<b>6</b>	<b>2</b>	<b>2</b>		
		<b>3914</b>	<b>12.4</b>			<b>525</b>	<b>110</b>	<b>1291</b>	<b>960</b>	<b>1028</b>		
334220	Radio and Television Broadcasting	1	1.11					1				
		70	0.22					70				
334413	Semiconductor and Related Device	2	2.22				1	1				
		73	0.23				35	38				
334415	Electronic Resistor Manufacturing	1	1.11					1				
		300	0.95					300				
334417	Electronic Connector Manufacturing	1	1.11				1					
		263	0.83				263					
334419	Other Electronic Component	1	1.11					1				
		15	0.05					15				
334513	Instruments and Related Products	1	1.11						1			
		60	0.19						60			
335999	All Other Miscellaneous Electrical	1	1.11						1			
		18	0.06						18			
<b>Electronics, Computers &amp; Telecom</b>		<b>8</b>	<b>8.89</b>				<b>2</b>	<b>4</b>	<b>2</b>			
		<b>799</b>	<b>2.53</b>				<b>298</b>	<b>423</b>	<b>78</b>			
332111	Iron and Steel Forging	3	3.33			1	1	1				
		248	0.79			110	50	88				
332116	Metal Stamping	1	1.11					1				
		175	0.55					175				
332322	Sheet Metal Work Manufacturing	1	1.11		1							
		8	0.03		8							
332999	All Other Miscellaneous Fabricated	1	1.11		1							
		63	0.20		63							

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>Forming &amp; Fabricating (non-auto)</b>		6	6.67		2	1	1	2				
		494	1.57		71	110	50	263				
332214	Kitchen Utensil, Pot, and Pan	1	1.11					1				
		220	0.69					220				
<b>Hardware</b>		1	1.11					1				
		220	0.69					220				
333613	Mechanical Power Transmission	2	2.22					1	1			
		52	0.16					14	38			
333995	Fluid Power Cylinder and Actuator	1	1.11				1					
		190	0.60				190					
333996	Fluid Power Pump and Motor	2	2.22				1		1			
		2312	7.29				187		2125			
<b>Industrial Motors, Hydraulic &amp;</b>		5	5.56				2	1	2			
		2554	8.05				377	14	2163			
333515	Cutting Tool and Machine Tool	1	1.11					1				
		750	2.37					750				
333923	Overhead Traveling Crane, Hoist, and	1	1.11					1				
		510	1.61					510				
333992	Welding and Soldering Equipment	1	1.11						1			
		375	1.18						375			
333999	All Other Miscellaneous General	3	3.33		1			1	1			
		2018	6.37		750			1250	18			
<b>Machinery Manufacturing</b>		6	6.67		1			3	2			
		3653	11.5		750			2510	393			
339112	Surgical and Medical Instrument	2	2.22					2				
		204	0.64					204				
339113	Surgical Appliance and Supplies	1	1.11					1				
		438	1.38					438				
<b>Medical</b>		3	3.33					3				
		642	2.02					642				
332710	Machine Shops	24	26.7	13	3	6		2				
		5598	17.7	2210	745	1591		1052				
332721	Precision Turned Product	1	1.11					1				
		188	0.59					188				
333514	Special Die and Tool, Die Set, Jig, and	3	3.33	2		1						
		118	0.37	68		50						
<b>Metalcutting Job Shops/Screw</b>		28	31.1	15	3	7		3				
		5904	18.6	2278	745	1641		1240				
332994	Small Arms Manufacturing	1	1.11						1			
		3000	9.46						3000			
<b>Military</b>		1	1.11						1			
		3000	9.46						3000			
333120	Construction Machinery Manufacturing	5	5.56				2		2	1		
		2822	8.90				383		1876	563		
333132	Oil and Gas Field Machinery and	2	2.22					2				
		1750	5.52					1750				

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>Oil &amp; Gas, Mining, Off-Road</b>		7	7.78				2	2	2	1		
		4572	14.4				383	1750	1876	563		
332991	Ball and Roller Bearing Manufacturing	3	3.33					2	1			
		333	1.05					305	28			
<b>Other Manufacturing</b>		3	3.33					2	1			
		333	1.05					305	28			
331210	Iron and Steel Pipe and Tube	1	1.11			1						
		45	0.14			45						
331316	Aluminum Extruded Product	1	1.11					1				
		220	0.69					220				
<b>Primary Metals</b>		2	2.22			1		1				
		265	0.83			45		220				
332911	Industrial Valve Manufacturing	1	1.11						1			
		263	0.83						263			
332912	Fluid Power Valve and Hose Fitting	1	1.11						1			
		2500	7.89						2500			
332913	Plumbing Fixture Fitting and Trim	1	1.11					1				
		193	0.61					193				
<b>Pumps, Valves &amp; Plumbing Products</b>		3	3.33					1	2			
		2956	9.33					193	2763			

# 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>	90	100.00	16	6	10	8	31	15	4		
	31696	100.00	2378	1566	2321	1218	9861	12486	1866		

**Machining Center, horizontal -- 400 mm pallet or b  
- Geographical Summary -**

<b>State</b>	<b>Plants</b>	<b>Percent</b>	<b>Budget</b>	<b>Percent</b>
Connecticut	4	4.44	248	0.79
Maine	1	1.11	280	0.88
Massachusetts	2	2.22	3,193	10.07
New Hampshire	1	1.11	28	0.09
<b>New England</b>	<b>8</b>	<b>8.89%</b>	<b>3,749</b>	<b>11.83%</b>
New Jersey	1	1.11	119	0.38
New York	1	1.11	700	2.21
Pennsylvania	6	6.67	317	1.00
<b>Mid-Atlantic</b>	<b>8</b>	<b>8.89%</b>	<b>1,136</b>	<b>3.59%</b>
Illinois	8	8.89	1,919	6.05
Indiana	2	2.22	1,638	5.17
Michigan	7	7.78	3,084	9.73
Ohio	7	7.78	1,357	4.27
Wisconsin	9	10.00	4,107	12.97
<b>E. N. Central</b>	<b>33</b>	<b>36.67%</b>	<b>12,105</b>	<b>38.19%</b>
Iowa	3	3.33	2,325	7.33
Kansas	2	2.22	1,876	5.92
Minnesota	4	4.44	387	1.21
Missouri	2	2.22	1,015	3.20
South Dakota	1	1.11	300	0.95
<b>W. N. Central</b>	<b>12</b>	<b>13.33%</b>	<b>5,903</b>	<b>18.61%</b>
Georgia	1	1.11	130	0.41
North Carolina	3	3.33	382	1.21
South Carolina	4	4.44	1,146	3.61
Virginia	3	3.33	274	0.87
<b>S. Atlantic</b>	<b>11</b>	<b>12.22%</b>	<b>1,932</b>	<b>6.10%</b>
Alabama	1	1.11	75	0.24
Mississippi	1	1.11	563	1.78
Tennessee	2	2.22	488	1.54
<b>E. S. Central</b>	<b>4</b>	<b>4.44%</b>	<b>1,126</b>	<b>3.56%</b>
Oklahoma	1	1.11	563	1.78
Texas	3	3.33	2,013	6.35
<b>W. S. Central</b>	<b>4</b>	<b>4.44%</b>	<b>2,576</b>	<b>8.13%</b>
Arizona	3	3.33	721	2.27
Colorado	2	2.22	405	1.27
New Mexico	1	1.11	275	0.87
<b>Mountain</b>	<b>6</b>	<b>6.67%</b>	<b>1,401</b>	<b>4.41%</b>
California	3	3.33	1,258	3.97
Oregon	1	1.11	510	1.61
<b>Pacific</b>	<b>4</b>	<b>4.44%</b>	<b>1,768</b>	<b>5.58%</b>

**Total Plants**

**90**

**Total Dollars**

**31,696**