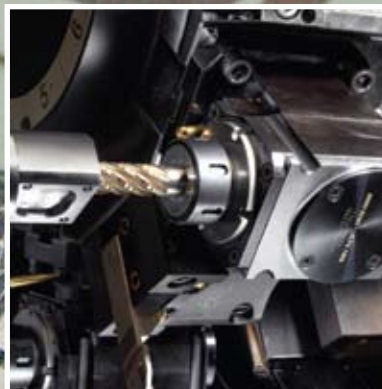


2011 Capital Spending

SURVEY & FORECAST

 Gardner
Research



METALCUTTING
METAL FORMING
ASSEMBLY
GAGING
MATERIAL HANDLING
FINISHING

In 2011, how much will your plant invest in Machinery/Equipment?

\$13,342,587,756

New: **\$8,525,913,576** Used: **\$3,522,443,168** Rebuilt: **\$1,294,231,012**
(Total projected 2011 capital equipment spending)

2011 Capital Equipment Projected Expenditures

What percentage of your 2011 capital equipment expenditure will be invested in each of the listed categories of machinery/equipment?

METALCUTTING			2011	% Total Investment
			\$5,817 Total	43.6
	New \$ 3,717	Used \$1,536	Rebuilt \$564	

Broaching	0.5
Drilling/tapping	1.4
Electrical discharge machining—ram type	0.3
Electrical discharge machining—wire type	1.5
Electrical discharge machining—small hole	0.2
Gearcutting/grinding	2.2
Grinding—flat/surface	2.5
Grinding—cylindrical/external	0.7
Grinding—creep feed	0.1
Grinding—ID/OD	1.8
Grinding—internal	0.4
Grinding—centerless	0.5
Grinding—other types	0.7
Machining centers, horizontal—400 mm pallet or below	3.9
Machining centers, horizontal—greater than 400 mm pallet	12.8
Machining centers, vertical—20 inch Y and below	5.3
Machining centers, vertical—greater than 20 inch Y	8.8
Machining centers, waterjet	1.4
Milling/boring—horizontal	5.6
Milling—vertical	4.3
Sawing/cutoff	1.9
Turning, lathes (turning—only machines), horizontal or vertical—manual	2.0
Turning, lathes (turning—only machines), horizontal—CNC, 10” chuck or below	6.5
Turning, lathes (turning—only machines), horizontal—CNC, greater than 10” chuck	4.9
Turning, lathes (turning—only machines), CNC, vertical	7.6
Turning, CNC turning centers (with milling capability), horizontal, 10” chuck or below	7.8
Turning, CNC turning centers (with milling capability), horizontal, above 10” chuck	5.5
Turning, CNC turning centers (with milling capability), vertical	2.2
Turning, screw machines (single, swiss & multi spindle), automatic	0.6
Turning, screw machines (single, swiss & multi spindle), CNC	2.3
Rotary transfer	1.6
Transfer machines and other special purpose	2.2

The 2011 Capital Spending Survey reports:

- 31.5% of plants plan to increase their spending on machine tools in 2011
- The operating level for machine tools is 74.4% for 2011
- The number one motive for machine tool purchases is to reduce costs
- The total projected expenditure for machine tools in 2011 is \$13.3 billion

METAL FORMING **\$1,294 mil Total** **9.7**
New \$827 **Used \$342** **Rebuilt \$125**

Ironworkers	2.1
Press brakes	16.3
Stamping presses	23.5
Punch presses	10.8
Roll forming lines	6.0
Coil processing equipment	2.7
Shears	3.1
Laser cutting machines	15.2
Band saws	3.5
Thermal cutting machines	4.3
Waterjet cutting machines	5.6
Tube/pipe bending & forming machines	4.7
Tube/pipe production equipment	2.2

ASSEMBLY **\$2,081 mil Total** **15.6**

Synchronous automatic and semi-automatic	38.6
Non-synchronous automatic and semi-automatic	25.4
Portable power tools	11.3
Other assembly equipment	24.7

**View complete
2011 Capital Spending
results at**
<http://gardnerweb.com/capspend>

MATERIAL HANDLING **\$667 mil Total** **5.0**

Automated storage & retrieval systems (AS/RS)	16.6
Conveyors	33.0
Automated guided vehicles (AGVs)	3.6
Other	46.8

GAGING-INSPECTION-TESTING **\$881 mil Total** **6.6**

In-process gaging	32.3
Post-process gaging	17.4
Coordinate measuring machines (CMMs)—automatic, DCC	18.2
Coordinate measuring machines (CMMs)—manual	5.3
Testing	16.5
Vision systems	10.3

FINISHING EQUIPMENT **\$601 mil Total** **4.5**

Cleaning	23.2
Electroplating and anodizing	7.0
Painting	30.5
Deburring (vibratory finishing, polishing, buffing)	15.6
Powder Coating	12.9
Air pollution control equipment	6.0
Water pollution control equipment	4.8

WELDING-RIVETING-BRAZING **\$587 mil Total** **4.4**

HEAT PROCESSING

PLASTIC MOLDING

OTHER

- For Example:**
- | | |
|------------------------------|-------------------------|
| Computer Hardware & Software | Specialized Equipment |
| Injection Molding Equipment | Tooling |
| Die Casting Equipment | Woodworking Equipment |
| Rubber Molding Equipment | Environmental Equipment |
| Electronic Assembly | Facility Upgrade |
| Semi Conductors | |



FOR MORE INFORMATION

Gardner Research's 43rd Annual Capital Spending Survey is the largest, most comprehensive survey detailing future spending in the discrete parts manufacturing industries. It generates a wealth of information. So much information, in fact, that it simply cannot be presented in detail in a brochure like this.

Details and analysis of the survey results are available online at www.gardnerweb.com/capspend. Also available are demographic details (industry segments, SIC, plant size, geographic location, etc.) for every product category as well as virtually every question in the survey.

Please contact your District Manager, or call, Marketing Department, Gardner Publications, Inc., at 513-527-8800 or 800-950-8020 or Fax: 513-527-8801

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