

# 2017

## CAPITAL SPENDING SURVEY



# TOOLING AND WORKHOLDING SUMMARY

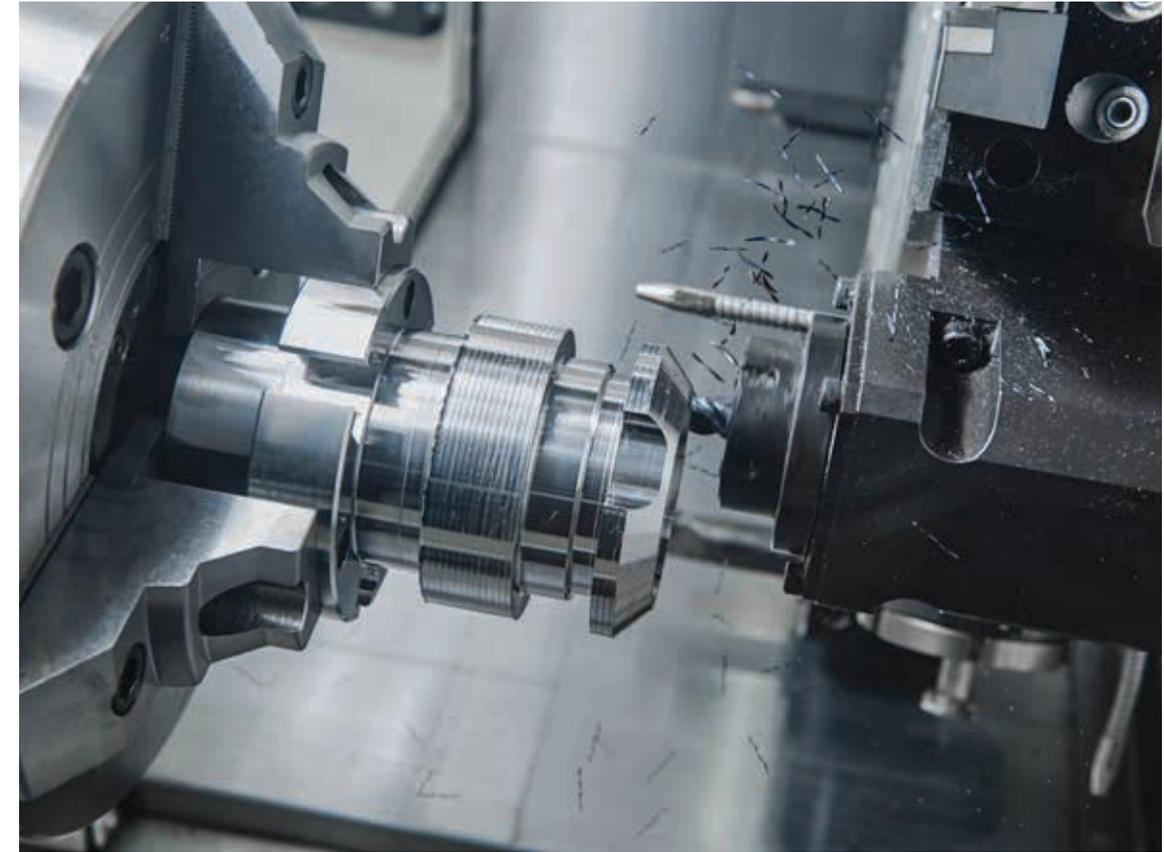
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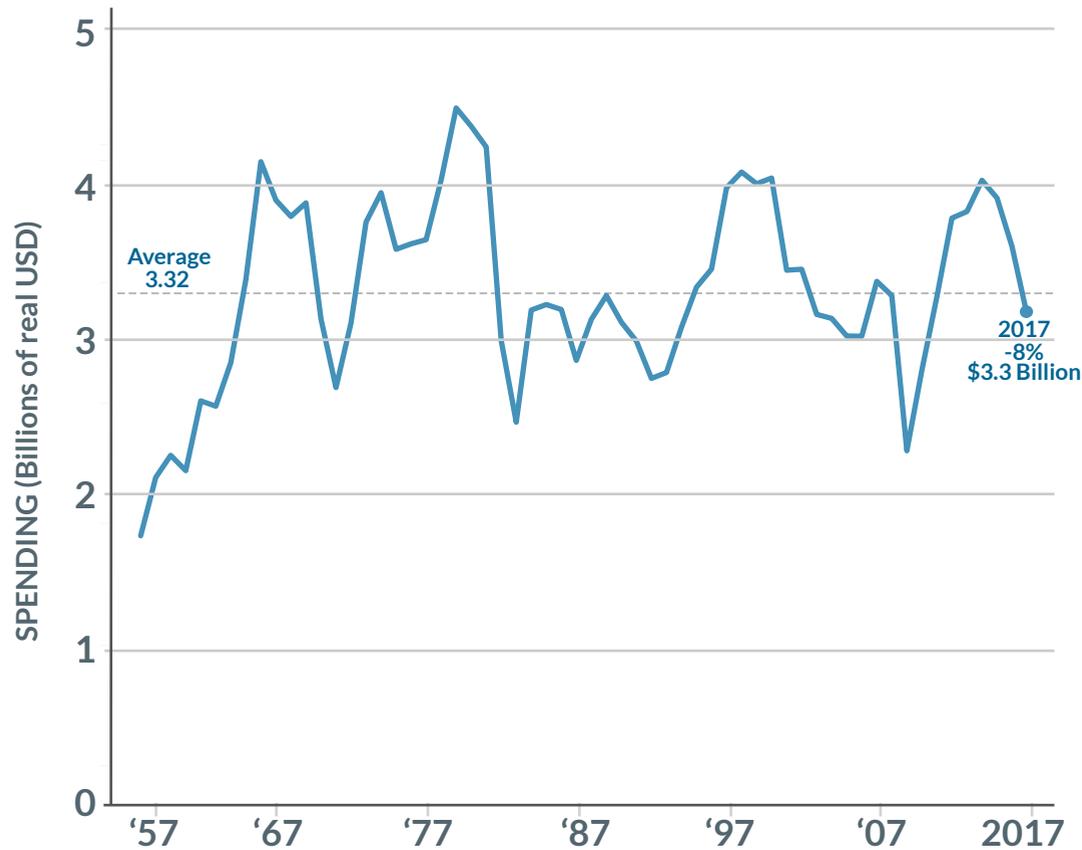
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## Cutting Tools - \$3.3 billion, down 8% Workholding - \$1.9 billion, up 5%

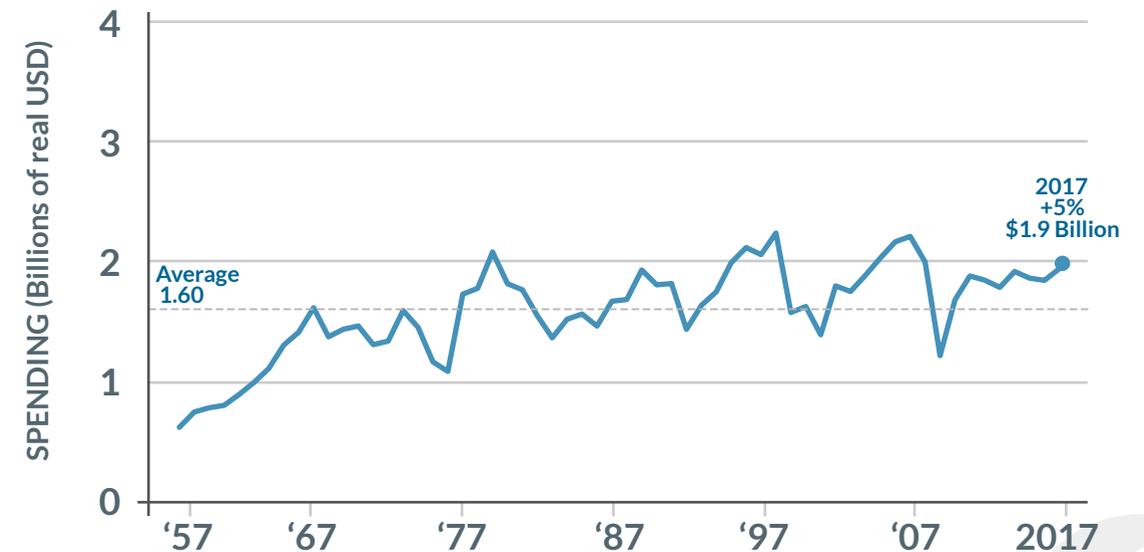
According to the 2017 Tooling & Workholding Capital Spending Survey by Gardner Business Intelligence, U.S. metalworking facilities will spend \$5.2 billion on new tooling and workholding.



### CUTTING TOOLS



### WORKHOLDING



## TOOLING

### PLANT SIZE

Plant Size (Number Of Employees)	2017 Spending	Change %
1-19	\$568,468,761	-29%
20-49	\$749,333,985	+4%
50-99	\$305,275,774	-55%
100-249	\$593,185,873	+29%
250+	\$1,100,089,232	+16%
<b>Grand Total</b>	<b>\$3,316,353,625</b>	<b>-8%</b>

### GROWTH BY REGION

Region	2017 Spending	Change %
North Central-East	\$1,151,956,750	+9%
North Central-West	\$846,289,241	-23%
Northeast	\$403,305,894	-51%
West	\$388,282,869	+17%
Southeast	\$359,409,951	+352%
South Central	\$167,108,919	-24%
<b>Grand Total</b>	<b>\$3,316,353,625</b>	<b>-8%</b>

**North-Central - East**  
IN, KY, MI, OH, TN

**North Central - West**  
IA, IL, KS, MN, MO, ND, NE, SD, WI

**Northeast**  
CT, DE, MA, MD, ME, NH, NJ, NY,  
PA, RI, VT, WV

**Southeast**  
AL, DC, FL, GA, MS, NC, SC, VA

**South Central**  
AR, LA, NM, OK, TX

**West**  
AK, AZ, CA, CO, HI, ID, NV, OR,  
UT, WA, WY

## WORKHOLDING

### PLANT SIZE

Plant Size (Number Of Employees)	2017 Spending	Change %
1-19	\$301,298,009	-36%
20-49	\$234,397,080	-30%
50-99	\$140,234,563	-58%
100-249	\$485,936,676	+28%
250+	\$786,696,069	+134%
<b>Grand Total</b>	<b>\$1,948,562,398</b>	<b>+5%</b>

### GROWTH BY REGION

Region	2017 Spending	Change %
North Central-East	\$777,421,762	+35%
North Central-West	\$451,744,097	-15%
Northeast	\$317,448,686	-7%
West	\$164,073,037	+34%
Southeast	\$162,805,113	-32%
South Central	\$75,069,702	+97%
<b>Grand Total</b>	<b>\$1,948,562,398</b>	<b>+5%</b>

## TOOLING

Tooling Type	2017 Spending	% Change
Boring Heads	\$112,249,088	+23%
Boring Tools	\$104,396,638	-30%
Broaches	\$18,725,822	+147%
Form/Special Tools	\$80,898,469	+59%
Gearcutters	\$17,551,767	+305%
Grinding Wheels/Abrasives	\$169,062,827	-31%
High-Speed Steel Cutters	\$209,096,228	+62%
High-Speed Steel Drills	\$263,605,181	+18%
Indexable Cutters	\$135,143,411	-31%
Indexable Drills	\$95,452,921	-14%
Inserts, Carbide	\$485,274,336	-24%
Inserts, CBN/Diamond	\$86,327,663	+53%
Inserts, Ceramic	\$90,939,709	+58%
Inserts, Cermet	\$30,296,813	-1%
Inserts, Other	\$32,689,270	+26%
OD/Facing Tools	\$130,468,752	-35%
Other Cutters	\$114,564,350	-9%
Other Cutting Tools	\$103,269,974	-43%
Other Drills	\$59,714,946	-19%
Saw Blades	\$132,659,149	-41%
Solid Carbide Cutters	\$293,998,864	-4%
Solid Carbide Drills	\$258,534,863	+16%
Spade Drills	\$49,649,498	+187%
Taps	\$195,407,413	-7%
Tool Presetters	\$46,375,673	+124%
<b>Grand Total</b>	<b>\$3,316,353,625</b>	<b>-8%</b>

Industry*	2017 Spending	% Change
Job Shops	\$805,308,491	-50%
Automotive	\$533,733,081	+54%
Non-Manufacturing	\$513,958,073	+643%
Machinery	\$242,758,624	-40%
Off-Road/Construction	\$248,841,606	+8,750%
Pumps/Valves/Plumbing	\$231,932,239	+18%
Electronics	\$144,608,746	-14%
Motors/Hydraulics/Mechanicals	\$137,307,633	+20%
Medical	\$65,374,507	+522%
HVAC	\$59,298,399	-
Aerospace	\$54,208,535	+88%
Custom Processors	\$54,325,795	+179%
Forming/Fabricating	\$52,864,214	-79%
Primary Metals	\$53,214,053	+284%
<b>Grand Total</b>	<b>\$3,197,733,996</b>	<b>-1%</b>

\*only industries with &gt; \$50 million in projected spending

## WORKHOLDING

Workholding Type	2017 Spending	% Change
Automated Sys/Transfer Lines	\$376,888,407	+104%
Bar Feeders	\$96,964,982	+65%
Dedicated Fixtures	\$366,505,765	-14%
EDM Workholding	\$93,651,234	+9%
Flexible Fixtures	\$112,848,300	-12%
Grinding Chucks	\$20,747,187	-29%
Grinding Load/Unload Devices	\$49,964,310	+1%
HSK	\$64,422,025	+9%
Indexing Devices	\$72,108,896	-29%
Other Grinding	\$46,184,044	+47%
Other Milling Workholding	\$90,343,019	-49%
Other Toolholders	\$50,547,763	+24%
Other Turning Workholding	\$93,967,268	+46%
Other Workholding	\$60,546,298	-33%
Pallet/Pallet-Handling Devices	\$146,328,594	+13%
Traditional V-Flange	\$61,797,525	-15%
Turning Chucks	\$112,676,535	+10%
Turning Load/Unload Devices	\$32,070,244	+55%
<b>Grand Total</b>	<b>\$1,948,562,398</b>	<b>+5%</b>

Industry	2017 Spending	% Change
Job Shops	\$602,093,434	-5%
Automotive	\$288,142,040	+185%
Non-Manufacturing	\$224,406,926	+152%
Electronics	\$112,972,379	+11%
Machinery/Equipment	\$110,213,537	-14%
Motors/Hydraulics/Mechanicals	\$100,906,672	+716%
Pumps/Valves/Plumbing	\$63,114,809	-62%
Off-Road/Construction	\$62,823,407	+743%
Medical	\$61,232,379	+724%
Aerospace	\$57,263,022	+298%
Primary Metals	\$55,216,599	+421%
Furniture	\$50,097,961	+4,229%
<b>Grand Total</b>	<b>\$1,788,483,165</b>	<b>+40%</b>

# TOOLING AND WORKHOLDING SUMMARY

## Methodology

The Gardner Business Intelligence 2017 Capital Spending Survey for machine tools was sent to 28,000 subscribers of *Modern Machine Shop*, *Production Machining*, *Moldmaking Technology* and *Automotive Design & Production* magazines. Surveys were mailed in mid-July, and the survey period was closed in mid-August. Respondents were asked to answer detailed questions about their budgeted spending on machine tools, testing equipment, software and more. The responses are projected across the metalworking industry based on plant size. The survey has an error factor of +/- \$1,000,000 at a 95% confidence level for the total machine tool spending projection.



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View these and other Gardner Business Intelligence reports at [Gardnerweb.com](http://Gardnerweb.com)

Capital Spending Survey for Tooling and Workholding

World Machine Tool Survey

Capital Spending Survey for Plastics Processing

Media Usage in Manufacturing Facilities

Gardner Business Index

Top Shops Benchmarking Survey

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