



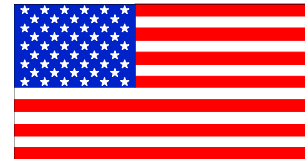
ISTMA-AMERICAS BUSINESS CONDITIONS REPORT

**For the 6-Month Period Ending
June 30, 2010**

Data Provided by the Members of:



CANADA
Canadian Tooling
& Machining
Association (CTMA)



USA
National Tooling
& Machining
Association (NTMA)

Results Compiled by:
National Tooling & Machining Association

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EXECUTIVE SUMMARY - CANADA

The uncertainty in the strength of the manufacturing upturn here in Canada is still creating concern for many member companies and the continuing strength of the Canadian dollar over the last year has not helped to rebuild business confidence following the global decline. Other than the manufacturing sectors which are exposed to global competitive issues, Canada has not experienced the major financial shocks that many other nations have.

Sixty percent (60%) of responding CTMA member companies have reported good to excellent business conditions for the 6-month period ending June 30, 2010 – compared to only 37% in the previous survey and 20% in the survey before that. Quoting, Shipments, Order Backlog, Profits and Employment are all showing greatly improved conditions, so let us hope this sign of improvement continues.

Major issues still facing the tooling sector at this time are work volumes, cash flow, liquidity, profitability, currency uncertainty and the age-old issue of payment terms.

We would like to thank all of the member companies that took the time to complete the ISTMA Americas regional business conditions survey for this period. Now that the World Tooling Conference and the CTMA's first incoming Trade Mission have been successfully completed in Windsor, Ontario, we look forward to getting back to the normal service for the membership.

Sincerely,



Les Payne
Executive Director
Canadian Tooling & Machining Association

EXECUTIVE SUMMARY – USA

Business conditions for NTMA member companies continue to rebound through the first half of 2010 and, while optimism still lingers, data indicates a well paced recovery throughout the remainder of this year.

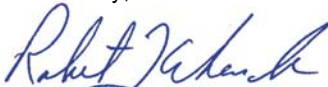
65% of member companies reported business conditions as good, very good, or excellent for the first half of 2010 – up from 38% reported for the second half of 2009 and up significantly from the 22% reported for the first half of 2009.

90% of survey respondents projected business conditions will either remain the same or increase during the second half of this year, and mirrors the projections reported at the end of 2009.

Additionally, more optimism is being communicated by our members as a majority of respondents indicated current business conditions, as they relate to Quoting, Shipments, Order Backlog, Profits, and Employment had improved compared to the first quarter of 2010.

For comparison purposes, the Institute for Supply Management continues to report improved conditions in manufacturing, with June marking the 11th consecutive month that the Purchasing Managers Index registered over 50; an indication that business is generally expanding.

Sincerely,



Rob Akers
Chief Operating Officer
National Tooling & Machining Association

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CANADA

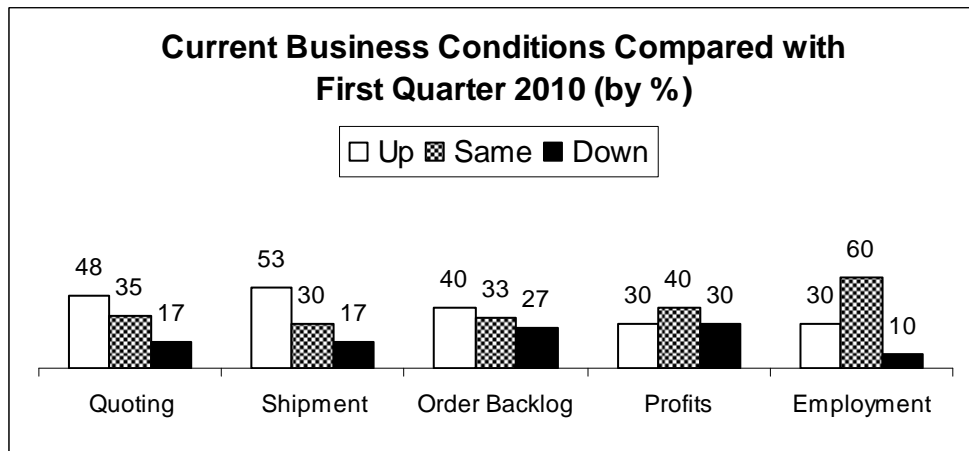
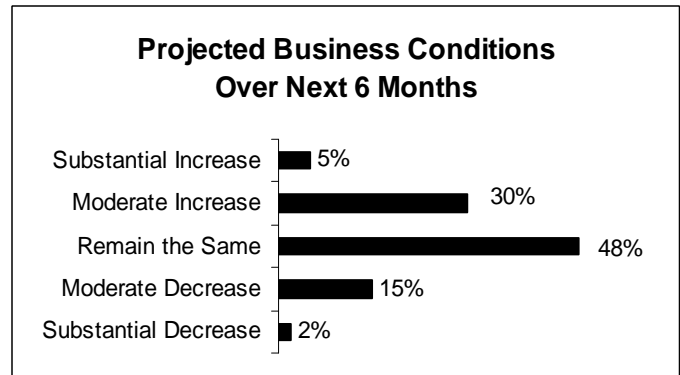
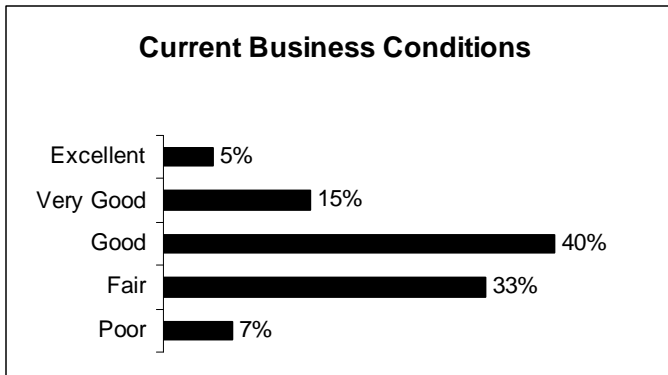


ALL SECTORS
 (40 survey responses ... 32% of CTMA membership)

Total Number of Skilled Employees: 1,361 (at December 31, 2009)
 1,476 (at June 30, 2010)

Current Average Work Week Per Skilled Employee: 42.8 hours

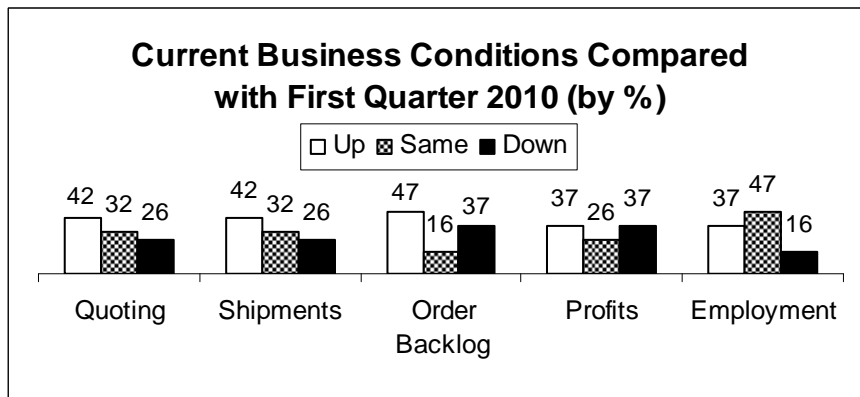
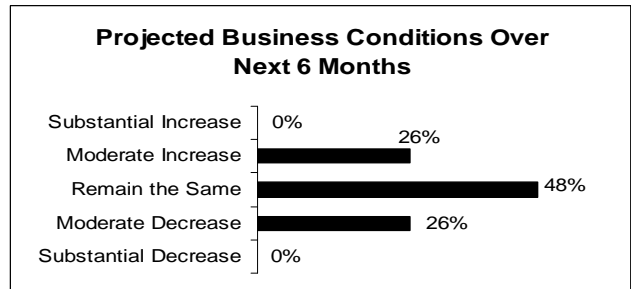
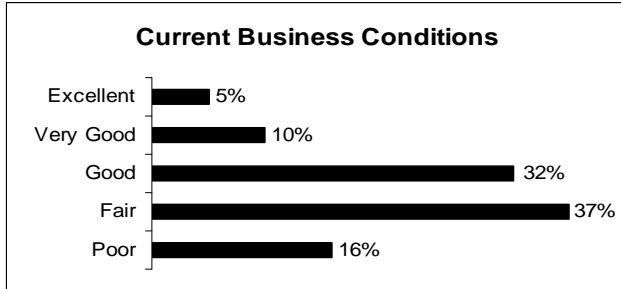
Average Future Work on Order Books: 6.9 Weeks



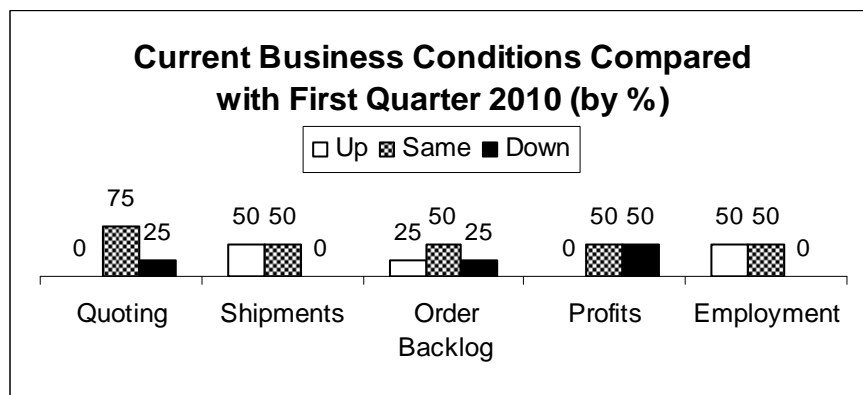
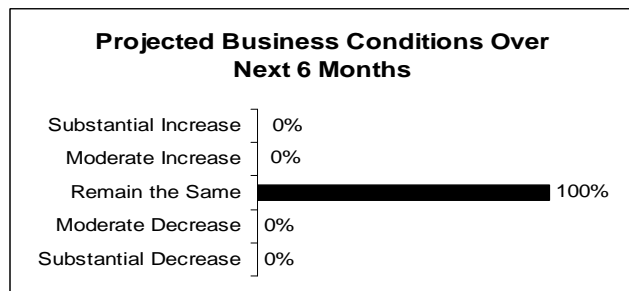
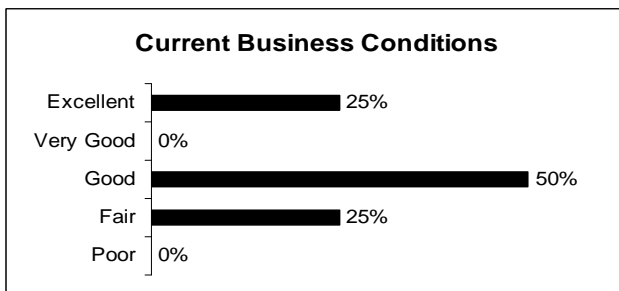
ISTMA-AMERICAS BUSINESS CONDITIONS REPORT
(For the Period Ending June 30, 2010)

TOOL, DIE & FIXTURE SECTOR
(19 survey responses)

CANADA



MOULD SECTOR
(4 survey responses)

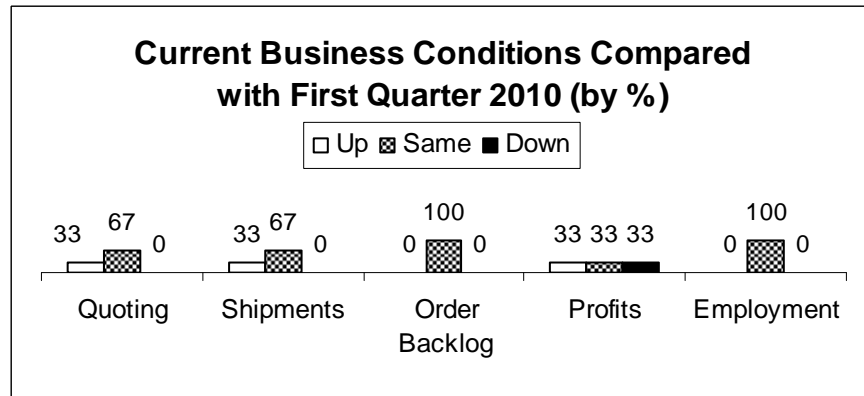
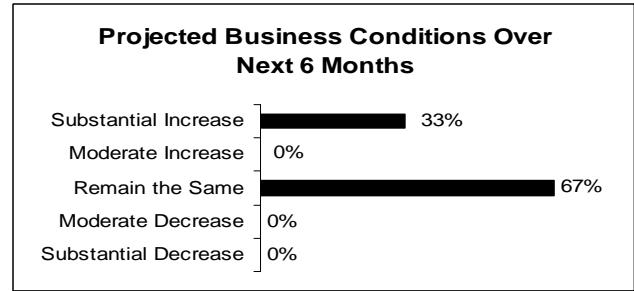
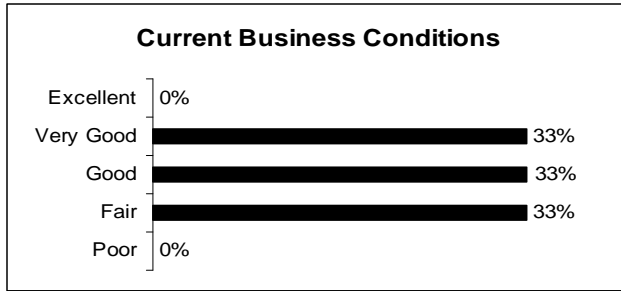


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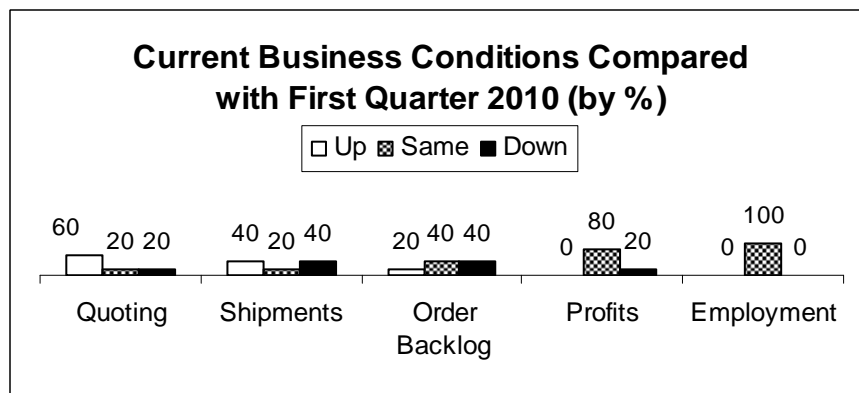
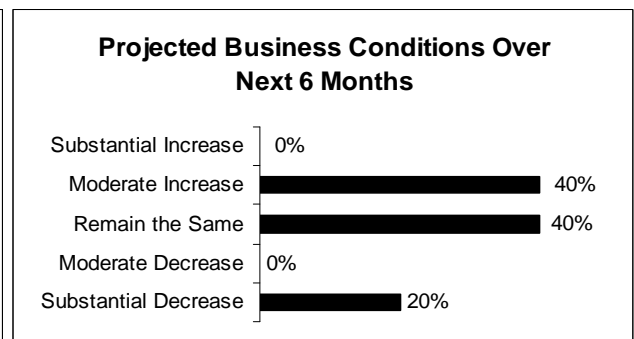
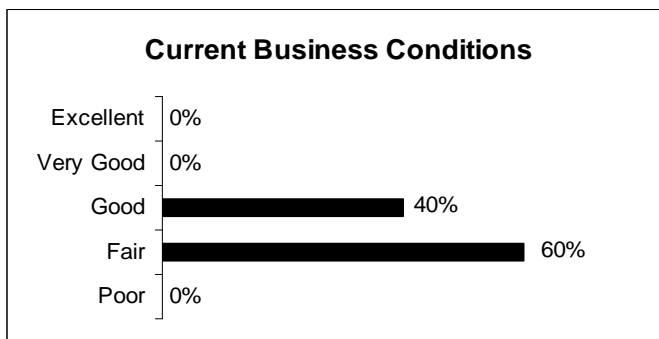
CANADA



SPECIAL MACHINES SECTOR
(3 survey responses)



PRECISION MACHINING
(5 survey responses)

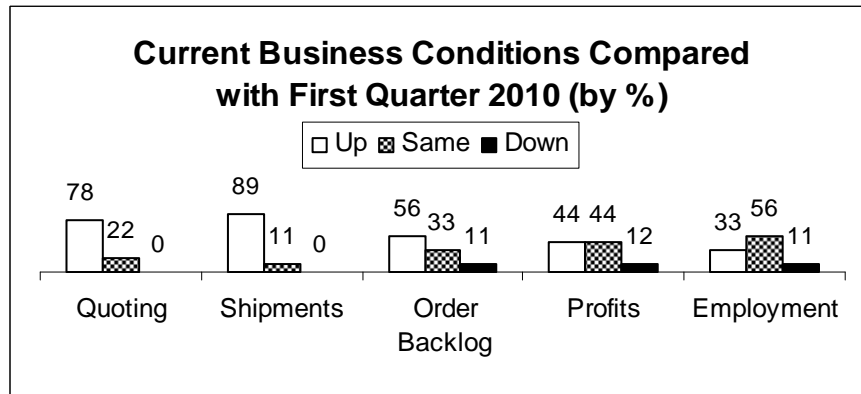
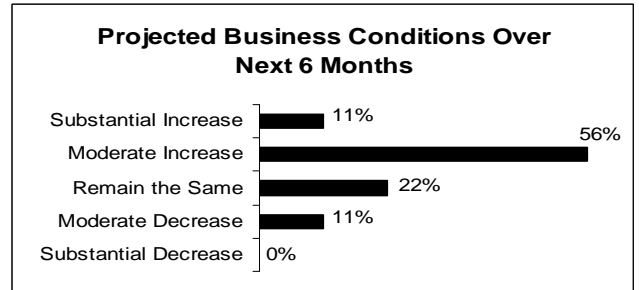
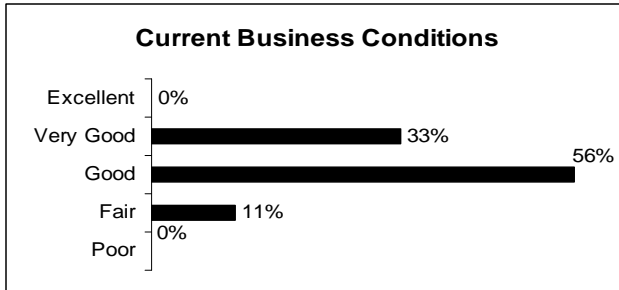


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CANADA

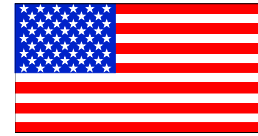


CUTTING TOOL SECTOR
 (9 survey responses)



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USA

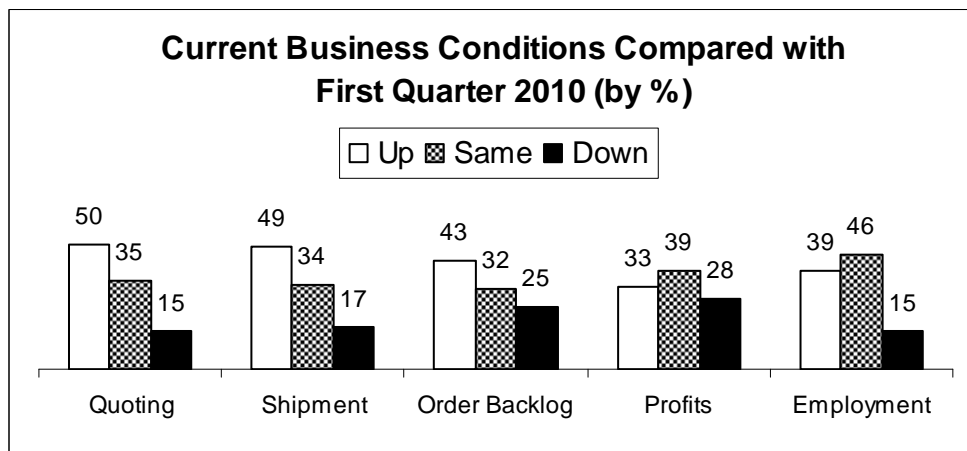
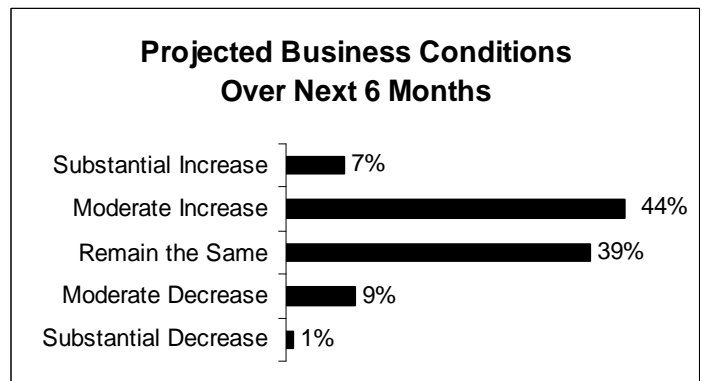
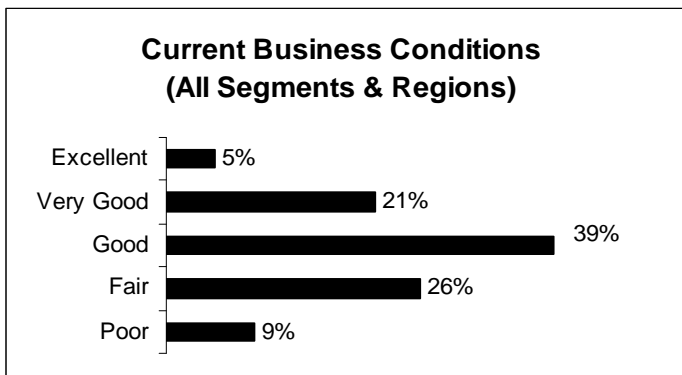


ALL SECTORS
 (281 survey responses ... 22% of NTMA membership)

Total Number of Skilled Employees: 12,384 (at December 31, 2009)
 17,440 (at June 30, 2010)

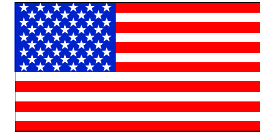
Current Average Work Week Per Skilled Employee: 43.8 hours

Average Future Work on Order Books: 14 weeks

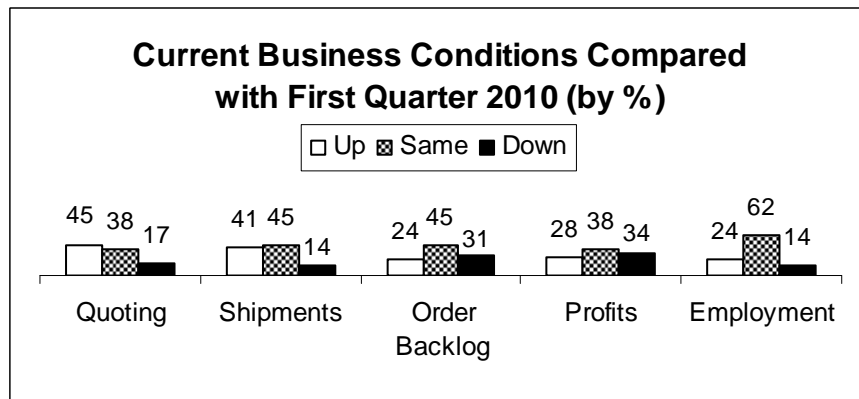
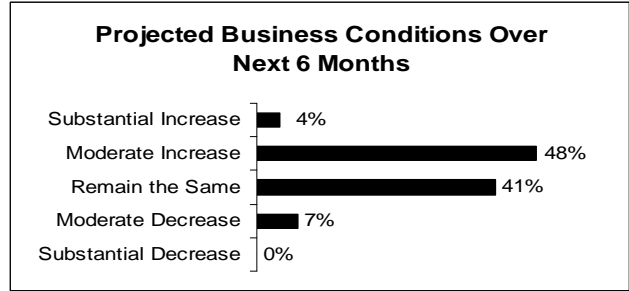
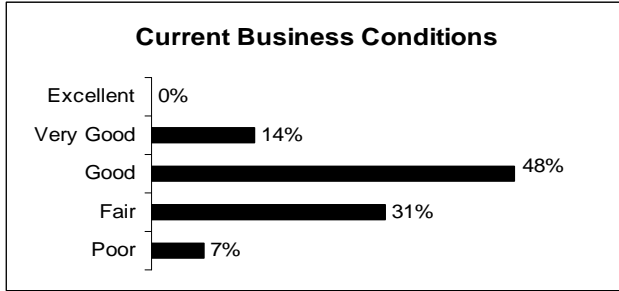


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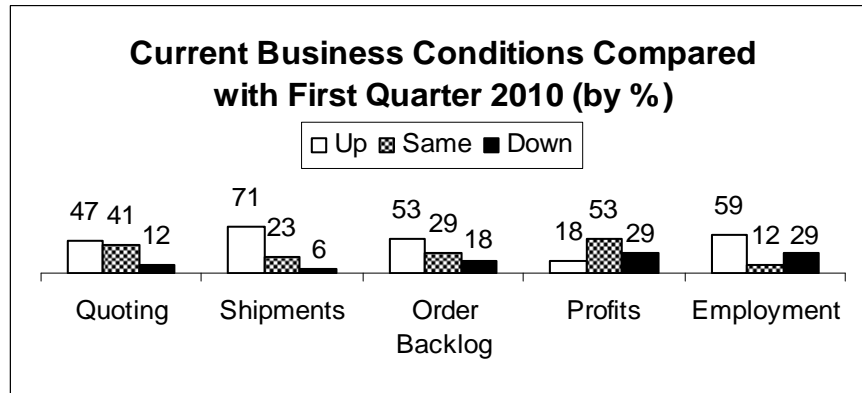
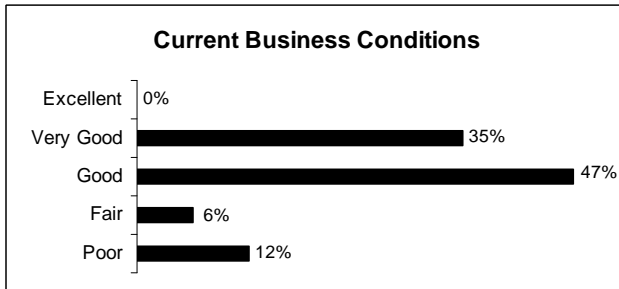
USA



TOOL, DIE & FIXTURE SECTOR
 (29 survey responses)

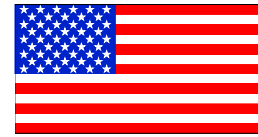


MOLD SECTOR
 (17 survey responses)

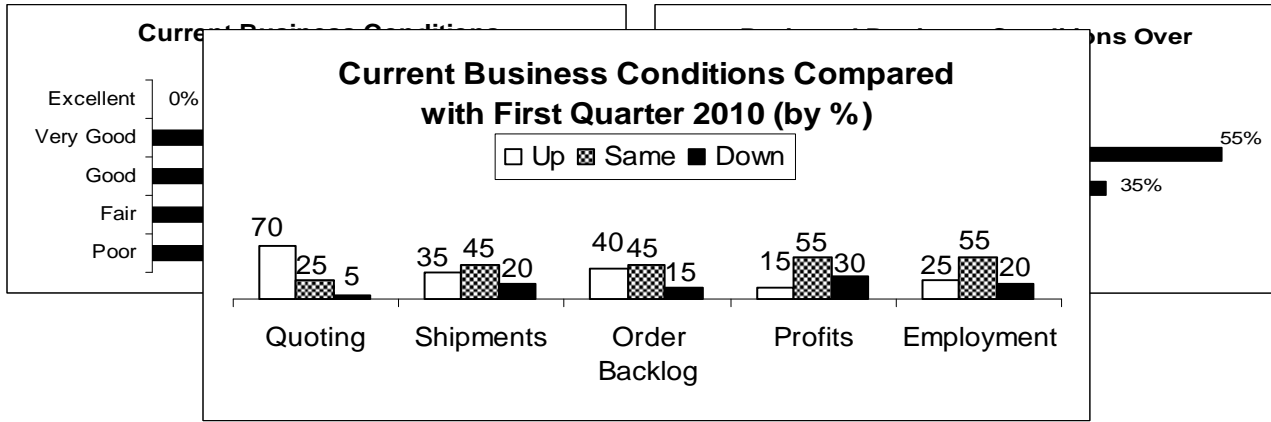


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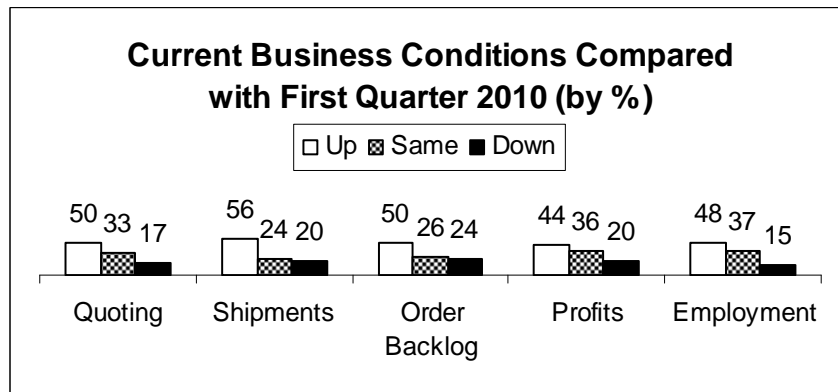
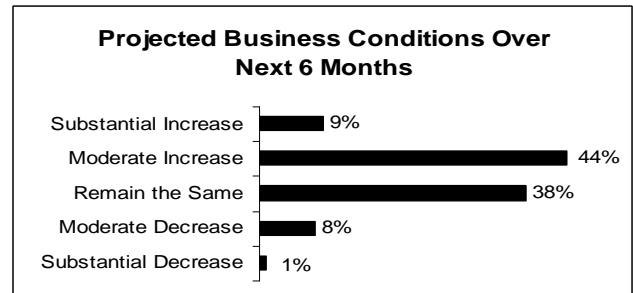
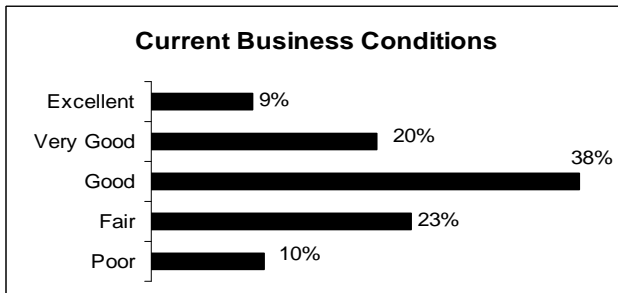
USA



SPECIAL MACHINES SECTOR
(20 survey responses)



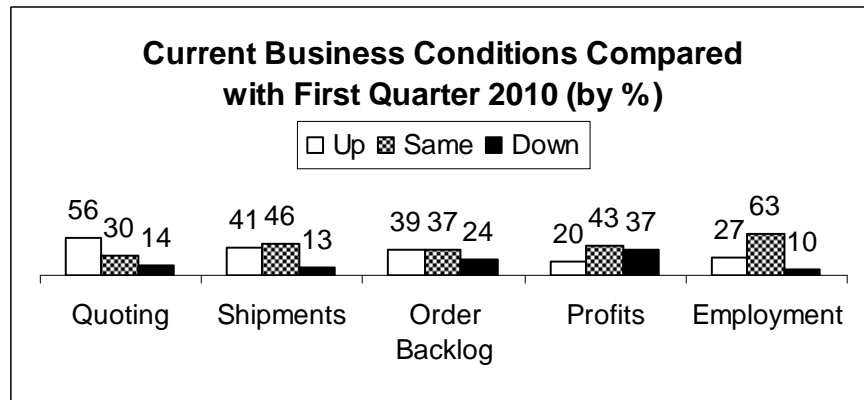
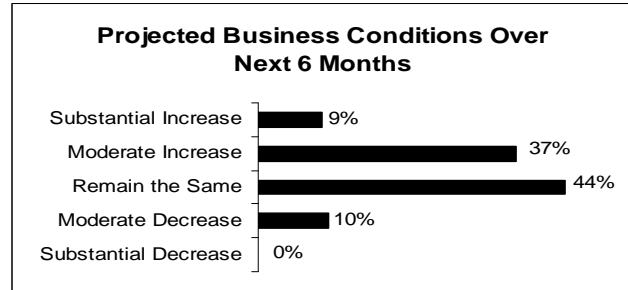
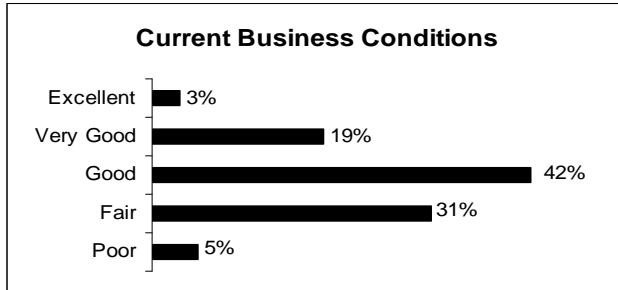
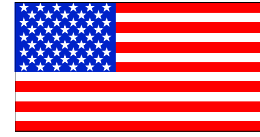
PRECISION MACHINING SECTOR (excluding Aerospace)
(130 survey responses)



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USA

AEROSPACE MACHINING & FABRICATION SECTOR
(59 survey responses)



METAL FABRICATION & STAMPING
(26 survey responses)

