



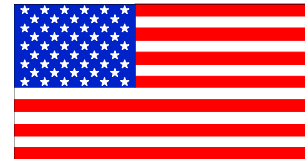
## **ISTMA-AMERICAS BUSINESS CONDITIONS REPORT**

**For the 6-Month Period Ending  
December 31, 2009**

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

**ISTMA-AMERICAS BUSINESS CONDITIONS REPORT**  
(For the Period Ending December 31, 2009)

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**ISTMA-AMERICAS BUSINESS CONDITIONS REPORT  
(For the Period Ending December 31, 2009)**

**EXECUTIVE SUMMARY - CANADA**

The general decline in manufacturing here in North America continues and has been further exasperated in Canada by the increased strength of the Canadian dollar over the last 2 quarters of 2009. As a resource-rich country, Canada does not rely upon its manufacturing sector to the same extent as many other countries and therefore this tends to create stability or, in this case, a strong currency.

37% of responding CTMA member companies reported good to excellent business conditions for the 6-month period ending December 31, 2009, compared to only 20% in the previous period. This has reduced the number of companies reporting poor conditions by 50% - could this perhaps be a possible sign of improvement if maintained? Quoting, Shipments and Order Backlog reports all show greatly improved results and while the Profits and Employment sections show only minor improvement, but improvements nonetheless.

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 the member companies that took the time to complete the survey during this trying manufacturing environment here in North America and the CTMA looks forward to hosting the next World Tooling Conference in Windsor, Ontario, Canada June 20-24, 2010-

Sincerely,



Les Payne  
Executive Director  
Canadian Tooling & Machining Association

**EXECUTIVE SUMMARY – USA**

Business conditions for NTMA member companies began to rebound toward the end of the 2009 and were a welcomed change over the dismal conditions experienced during the first six months.

38% of member companies reported business conditions as good, very good, or excellent for the second half of 2009 – up from 22% for the first half of 2009 and slightly down from the 42% for the second half of 2008.

44% of survey respondents projected business conditions will either remain the same or decrease during the first half of this year, a 36% improvement from the 80% reported previously.

Additionally, more optimism is being communicated by our members as 56% of respondents projected business conditions to increase during the first half of 2009 – up from the 40% projected for the second half of 2009 and from the 24% that reported such optimism in December, 2008.

Thanks to the 306 NTMA member companies (21% of membership) that participated in the December 2009 NTMA Business Conditions Report.

Sincerely,



Rob Akers  
Chief Operating Officer  
National Tooling & Machining Association

**ISTMA-AMERICAS BUSINESS CONDITIONS REPORT**  
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**CANADA**

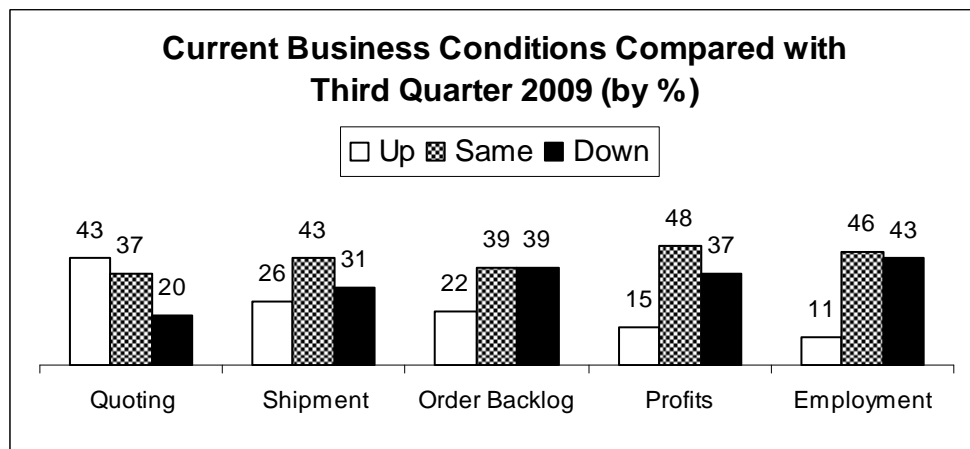
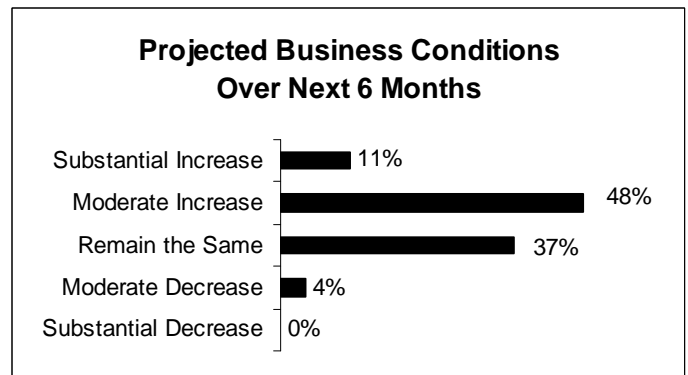
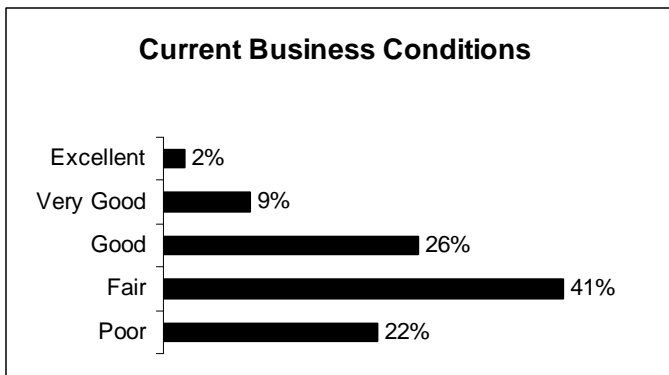


**ALL SECTORS**  
 (46 survey responses ... 32% of CTMA membership)

Total Number of Skilled Employees: 2,771 (at June 30, 2009)  
 2,783 (at December 31, 2009)

Current Average Work Week Per Skilled Employee: 40.25 hours

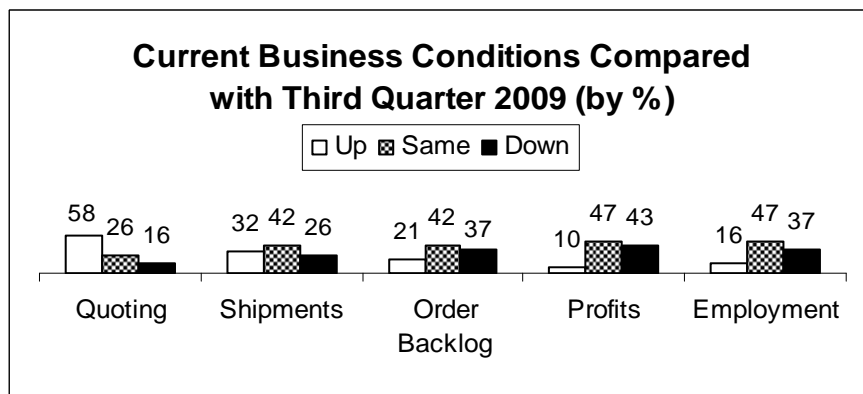
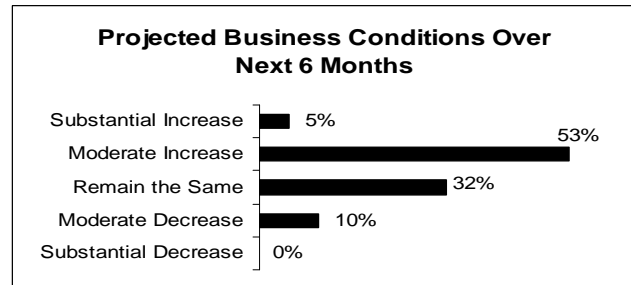
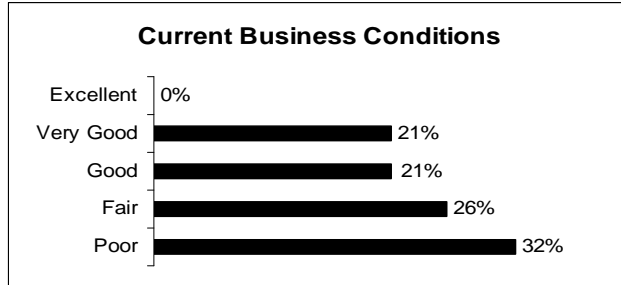
Average Future Work on Order Books: 10.1 Weeks



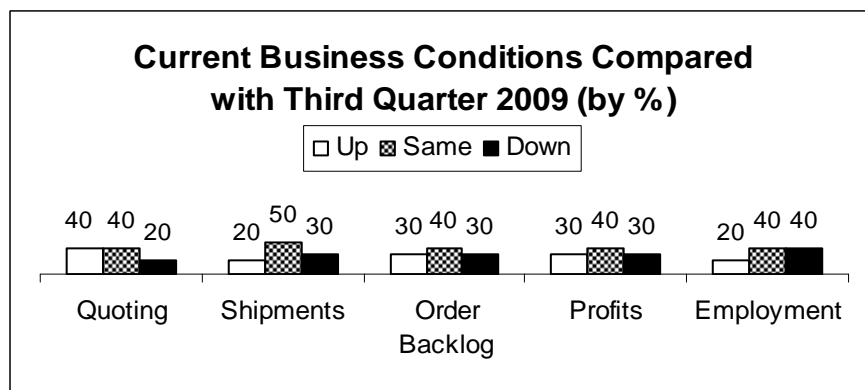
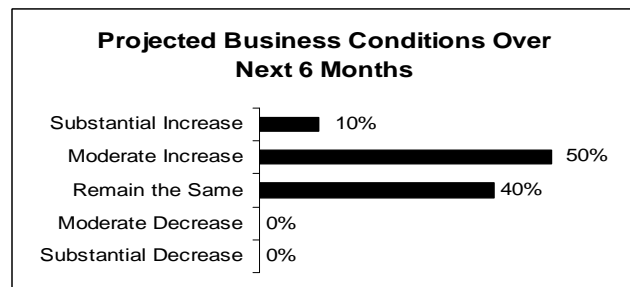
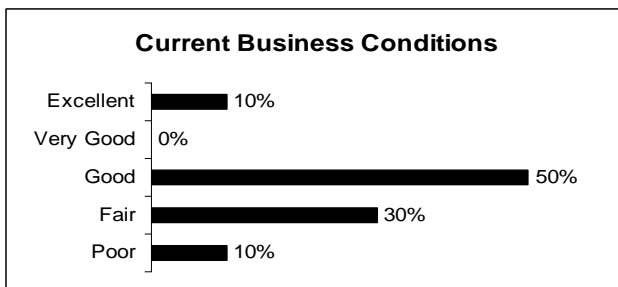
**ISTMA-AMERICAS BUSINESS CONDITIONS REPORT**  
(For the Period Ending December 31, 2009)

**TOOL, DIE & FIXTURE SECTOR**  
(19 survey responses)

**CANADA**



**MOULD SECTOR**  
(10 survey responses)

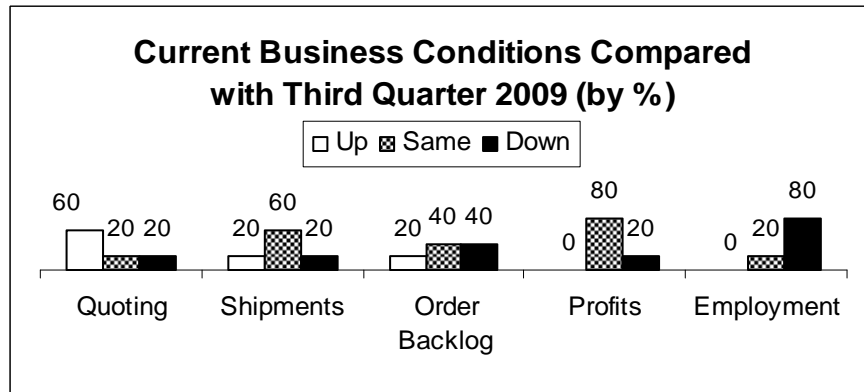
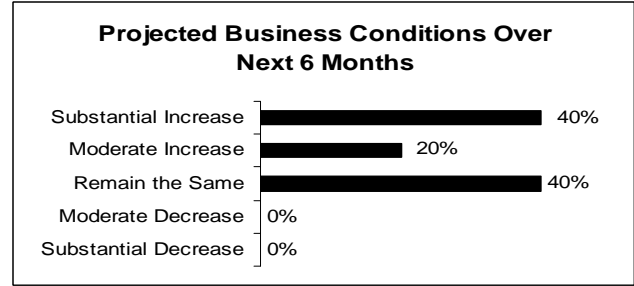
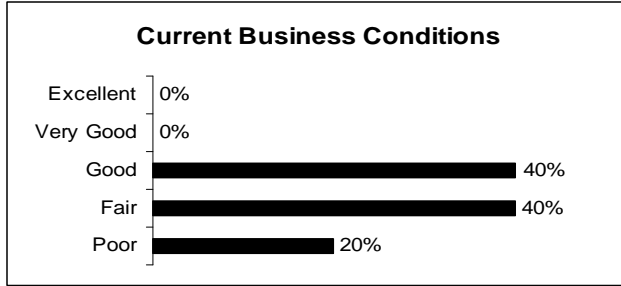


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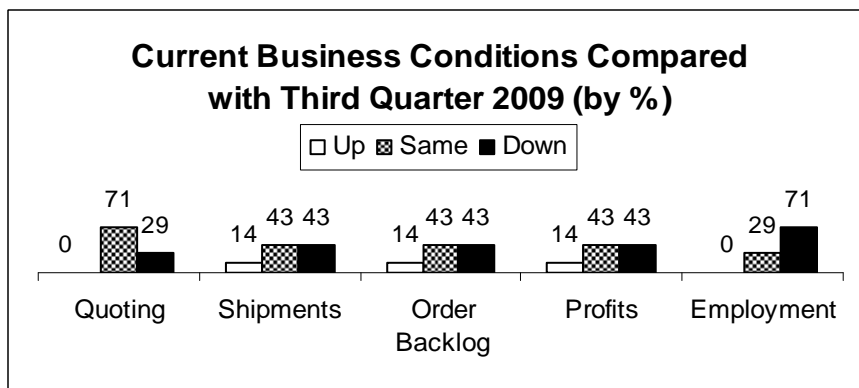
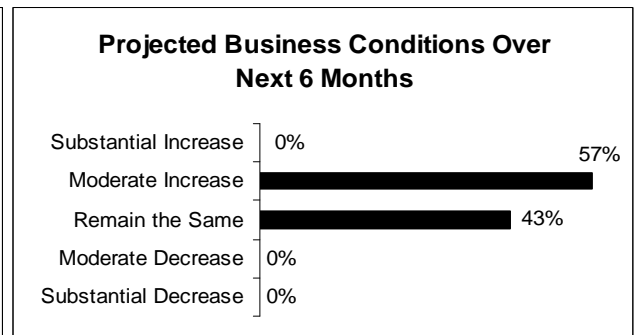
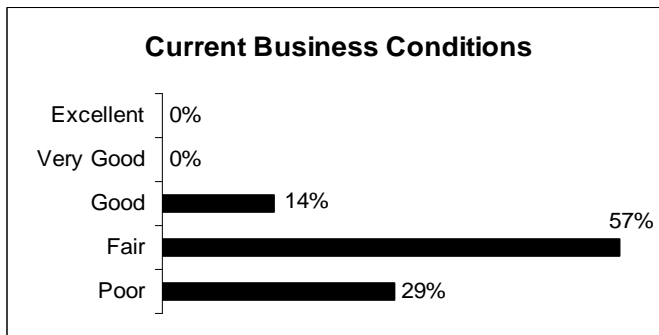
**CANADA**



**SPECIAL MACHINES SECTOR**  
(6 survey responses)



**PRECISION MACHINING**  
(7 survey responses)

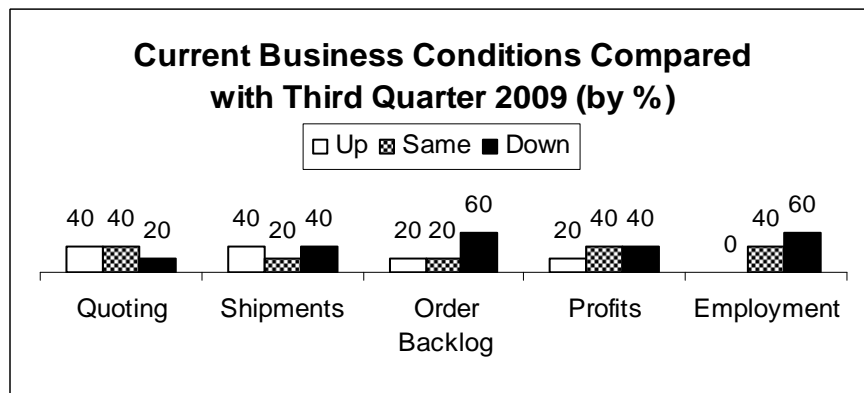
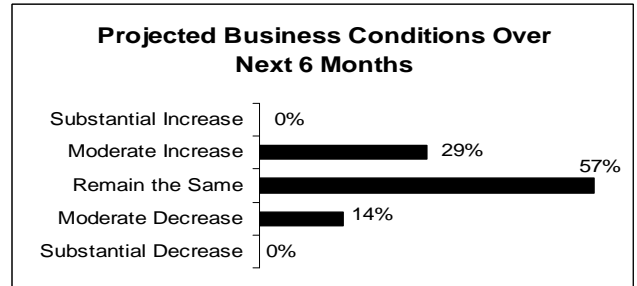
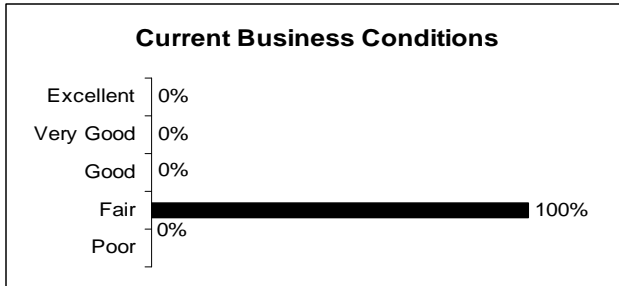


**ISTMA-AMERICAS BUSINESS CONDITIONS REPORT**  
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**CANADA**

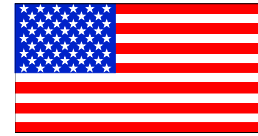


**CUTTING TOOL SECTOR**  
 (5 survey responses)



**ISTMA-AMERICAS BUSINESS CONDITIONS REPORT**  
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USA

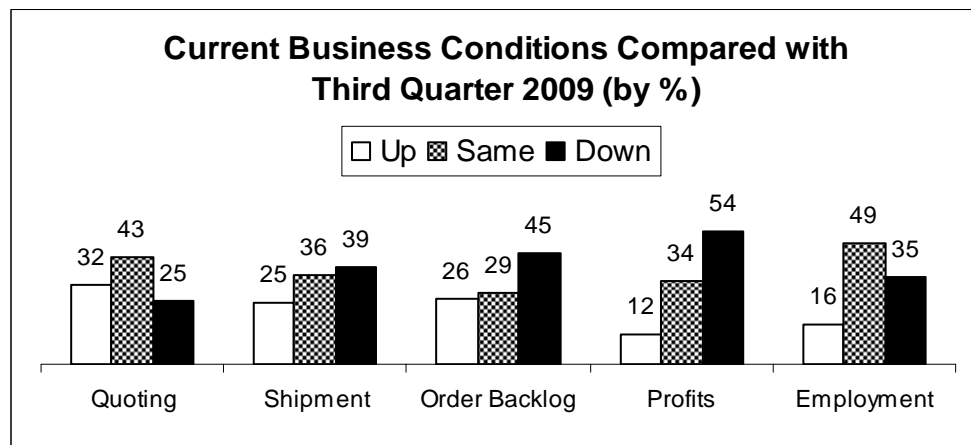
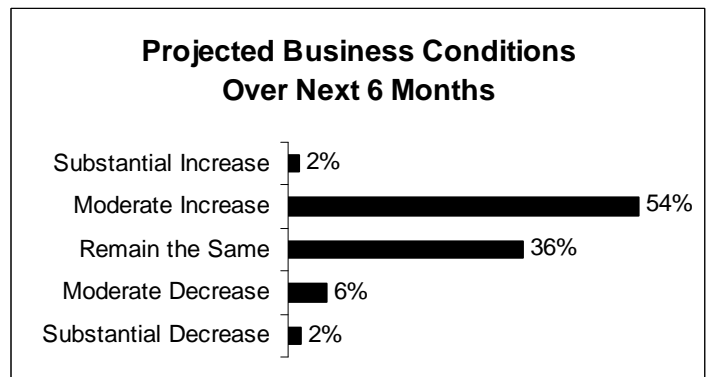
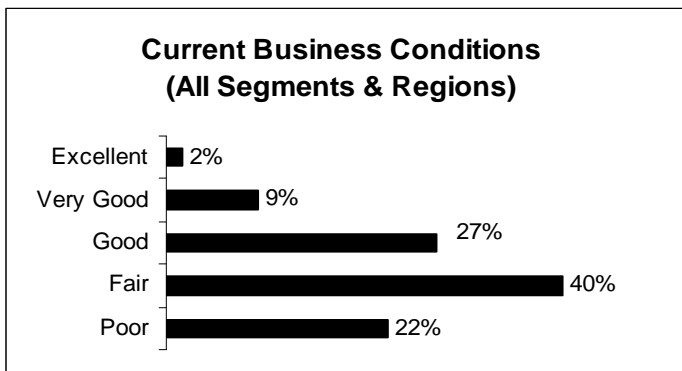


**ALL SECTORS**  
 (306 survey responses ... 21% of NTMA membership)

Total Number of Skilled Employees: 13,764 (at June 30, 2009)  
 13,358 (at December 31, 2009)

Current Average Work Week Per Skilled Employee: 41.5 hours

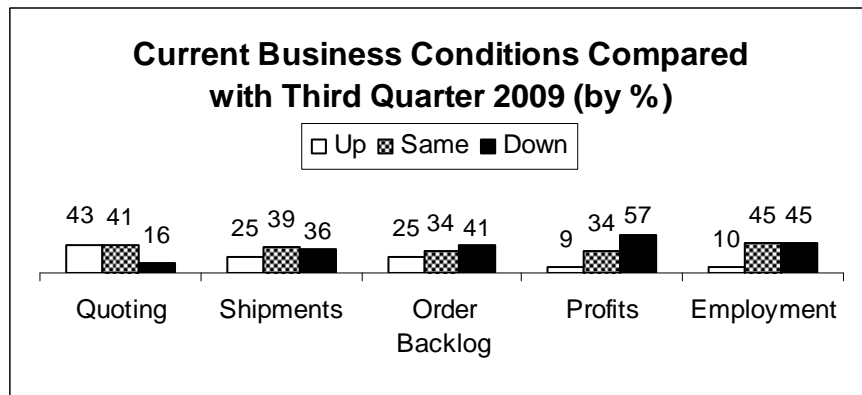
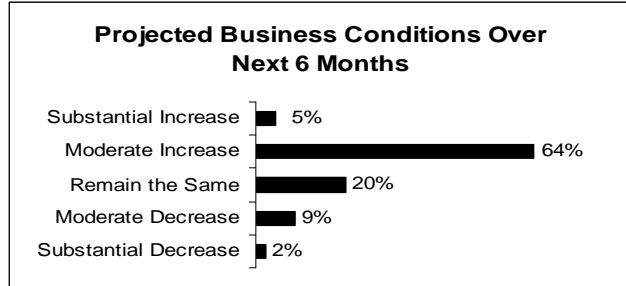
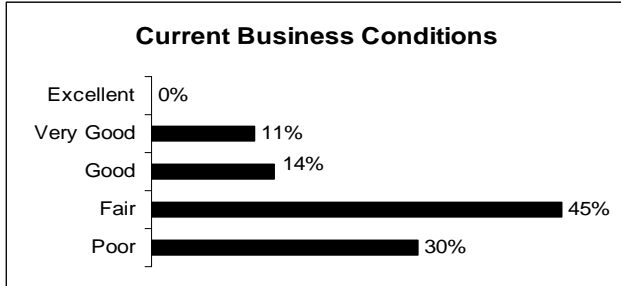
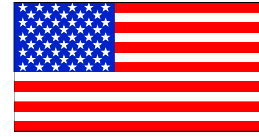
Average Future Work on Order Books: 15.1 weeks



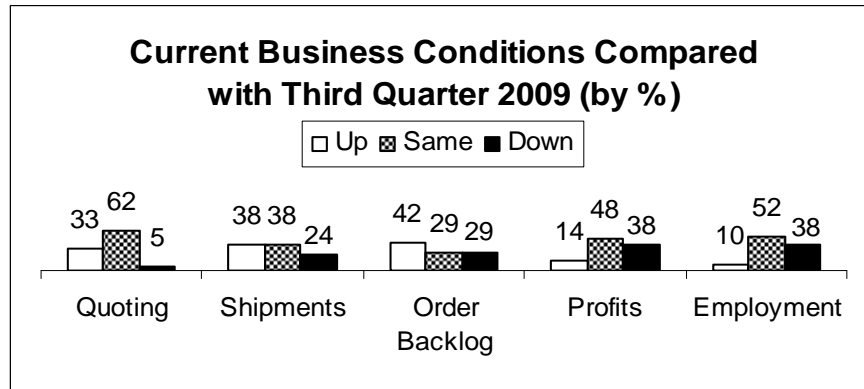
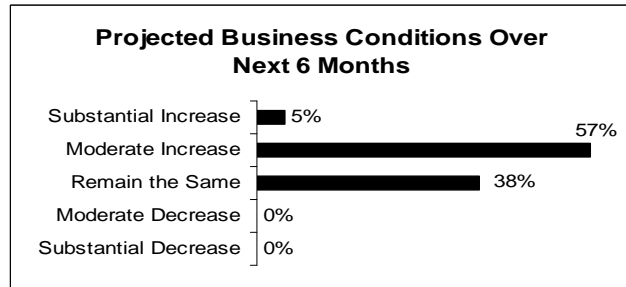
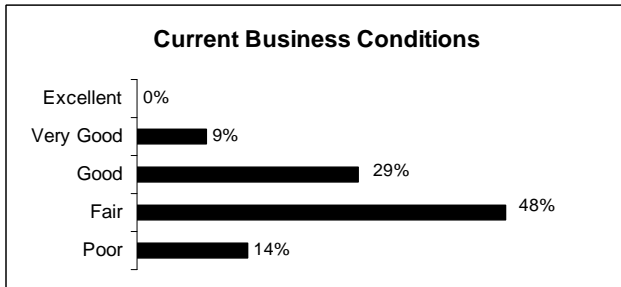
**ISTMA-AMERICAS BUSINESS CONDITIONS REPORT**  
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**USA**

**TOOL, DIE & FIXTURE SECTOR**  
 (44 survey responses)

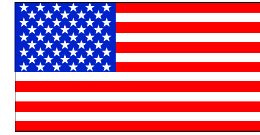


**MOLD SECTOR**  
 (21 survey responses)

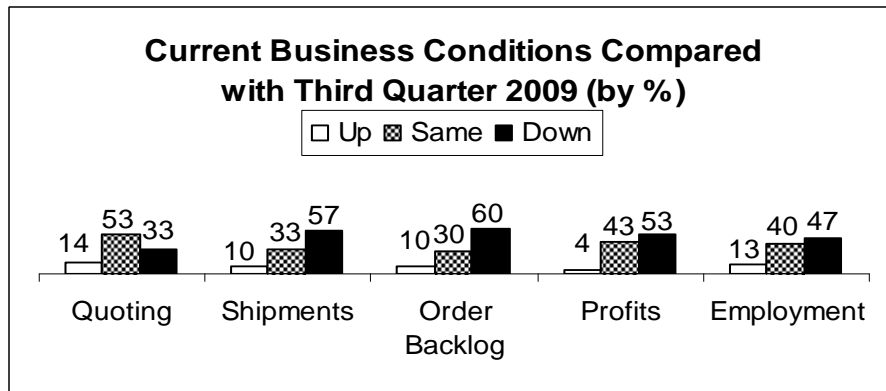
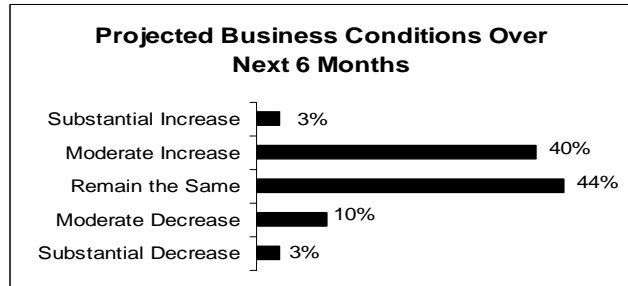
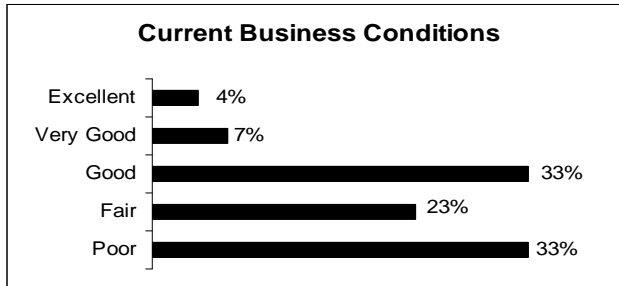


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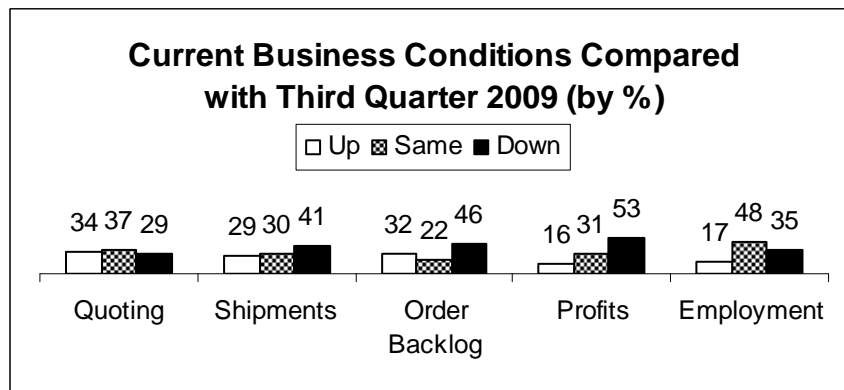
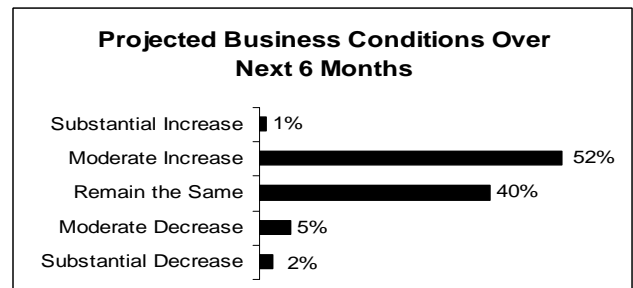
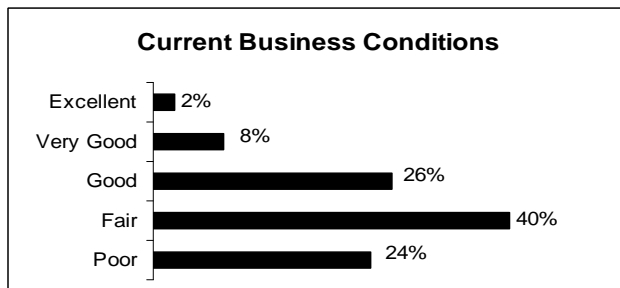
**USA**



**SPECIAL MACHINES SECTOR**  
(30 survey responses)



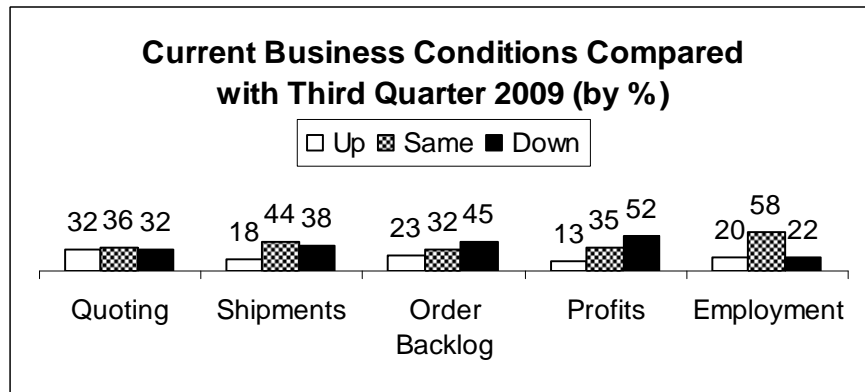
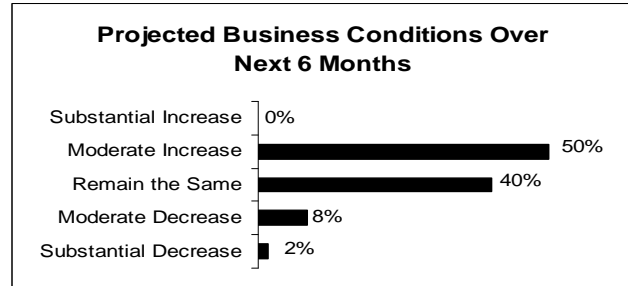
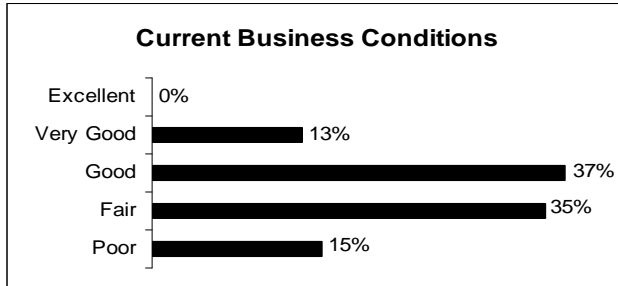
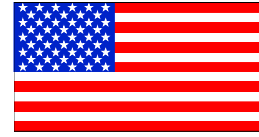
**PRECISION MACHINING SECTOR (excluding Aerospace)**  
(129 survey responses)



**ISTMA-AMERICAS BUSINESS CONDITIONS REPORT**  
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**USA**

**AEROSPACE MACHINING & FABRICATION SECTOR**  
 (60 survey responses)



**METAL FABRICATION & STAMPING**  
 (24 survey responses)

