



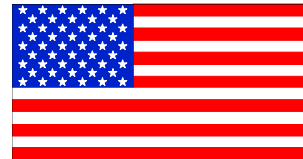
ISTMA-AMERICAS BUSINESS CONDITIONS REPORT

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

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ISTMA-AMERICAS BUSINESS CONDITIONS REPORT
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EXECUTIVE SUMMARY - CANADA

Business conditions as reported by CTMA member companies show major declines continue in all manufacturing elements such as quoting, shipments, order backlogs, profits and employment, compared to first quarter of 2009.

Order books have not improved and the average workweek per skilled employee has declined yet again.

80% report current business conditions as fair to poor and we have been asked to include a new section into the next survey entitled "Ugly".

It would appear that the major issues still facing the tooling sector at this time are cash flow, liquidity and payment terms.

We would like to thank the 55 companies that took the time to complete the survey, which has proven to be very timely, as we have recently been requested to report conditions on our sector to the Canadian federal government.

Sincerely,



Les Payne
Executive Director
Canadian Tooling & Machining Association

EXECUTIVE SUMMARY – USA

As a result of the continuing downturn in the manufacturing sector of the U.S. economy, business conditions deteriorated even further for NTMA member companies during the first six months of 2009.

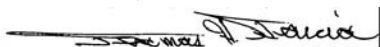
Only 22% of member companies reported business conditions as good, very good, or excellent for the first half of 2009 – down from 42% for the second half of 2008 and 70% for the first half of 2008. And 60% of survey respondents projected business conditions will either remain the same or decrease during the second half of this year. However, on the upside, some respondents expressed a degree of optimism for the next six months - 40% of respondents projected business conditions to increase during the second half – up from only 24% that reported such optimism in December, 2008.

Other downward indicators were as follows:

- Future Work on Books (Average) – 11.1 weeks down from 13.3 weeks in December, 2008
- Average Workweek per Skilled Employee – 39.7 hours down from 43.5 hours in December, 2008

And finally, those NTMA members that participated in the June, 2009 survey reported an **11.2 percent decline in employment** from December, 2008 levels. Unemployment levels in the special tooling and machining industry appear to be in line with national levels.

Sincerely,

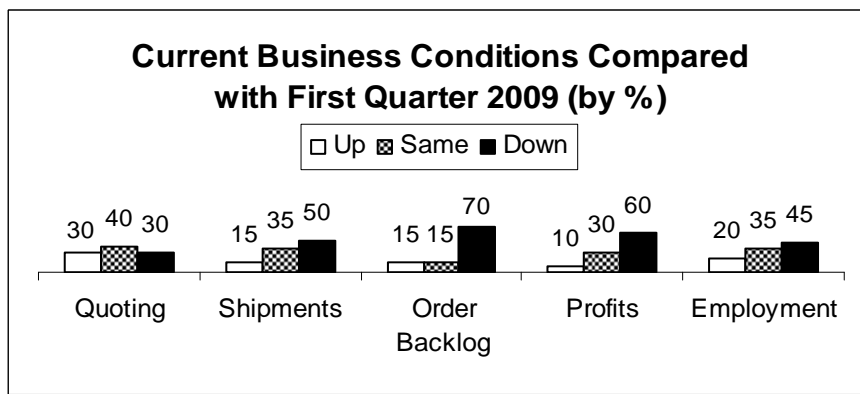
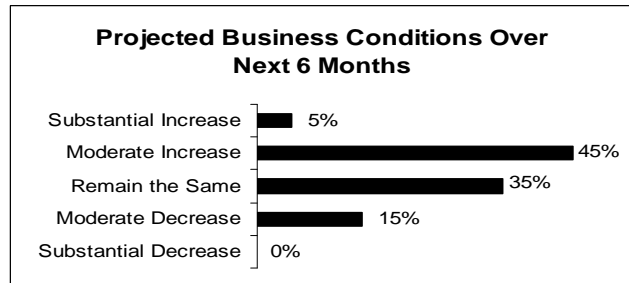
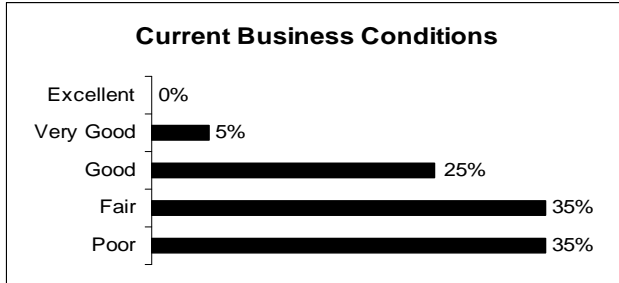


Tom Garcia
Director, Business Development
National Tooling & Machining Association

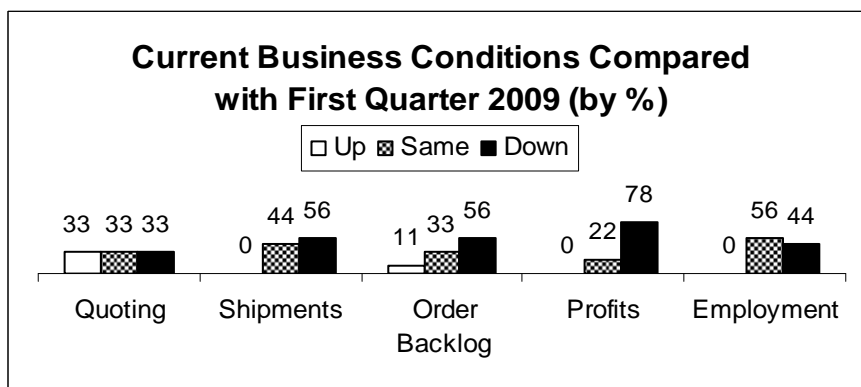
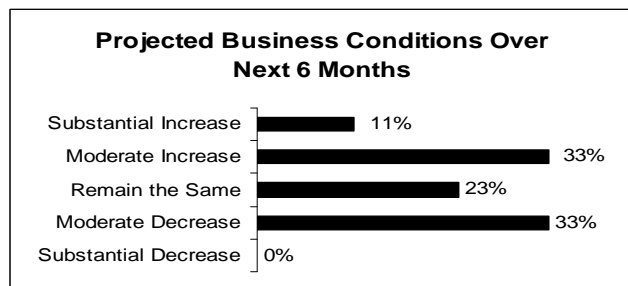
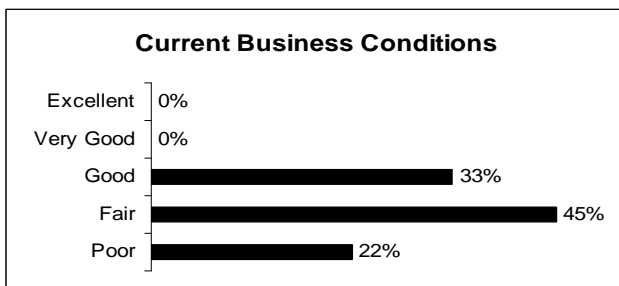
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TOOL, DIE & FIXTURE SECTOR
(20 survey responses)

CANADA



MOULD SECTOR
(9 survey responses)

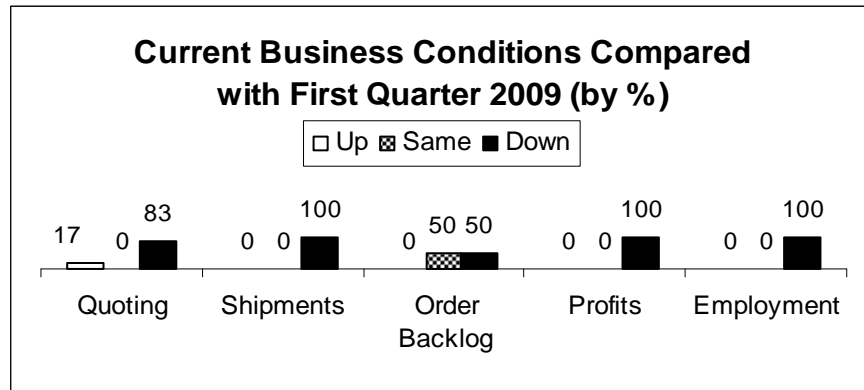
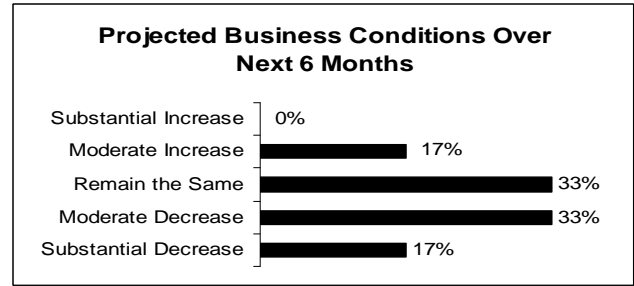
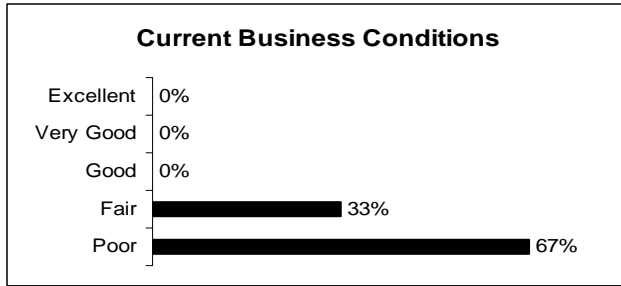


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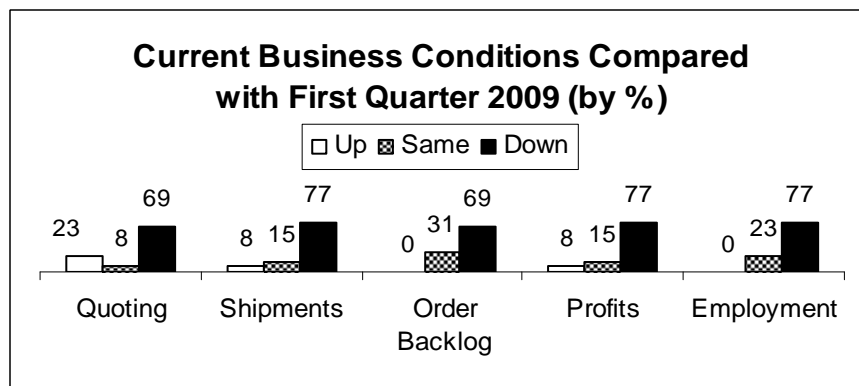
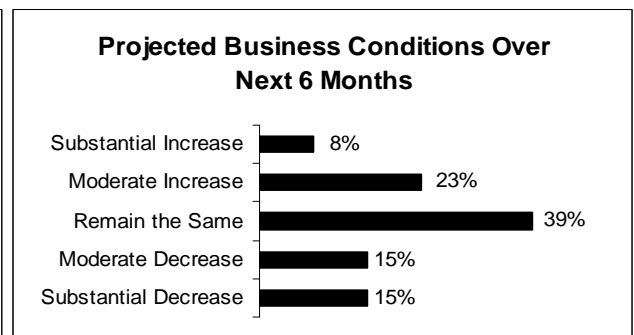
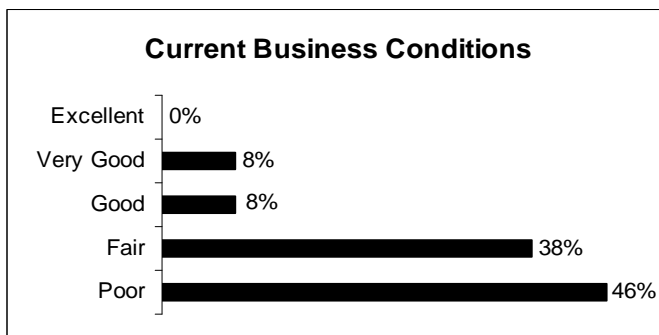
CANADA



SPECIAL MACHINES SECTOR
(6 survey responses)



PRECISION MACHINING
(13 survey responses)

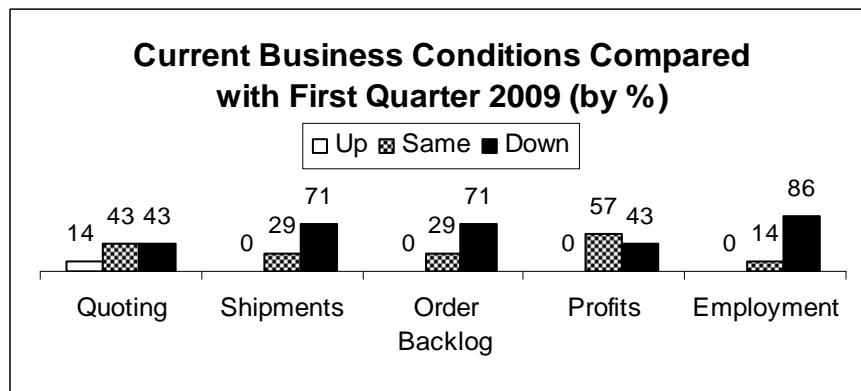
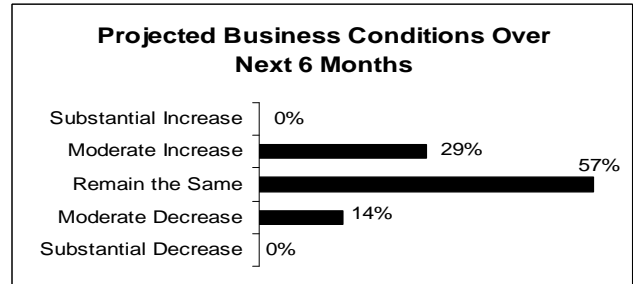
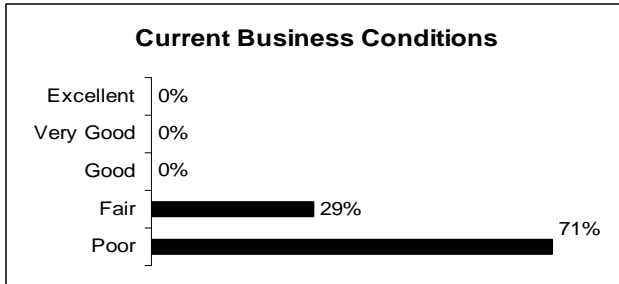


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CANADA

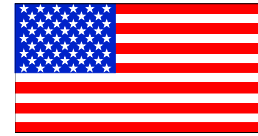


CUTTING TOOL SECTOR
 (7 survey responses)



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USA

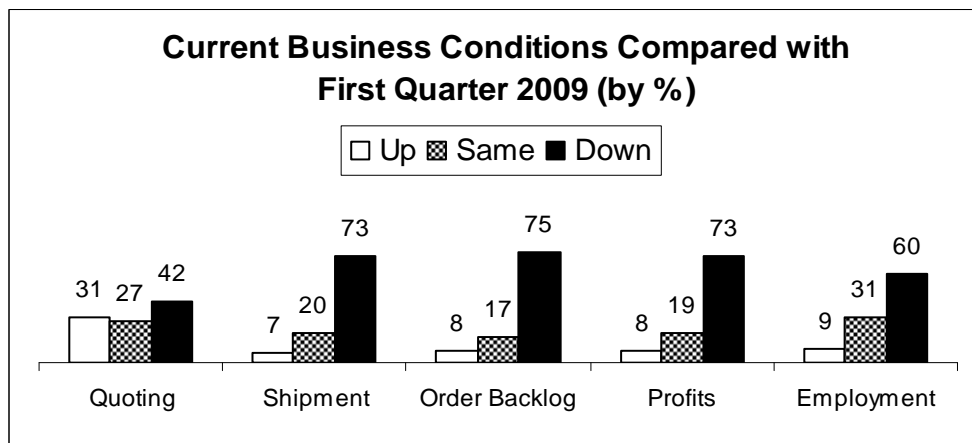
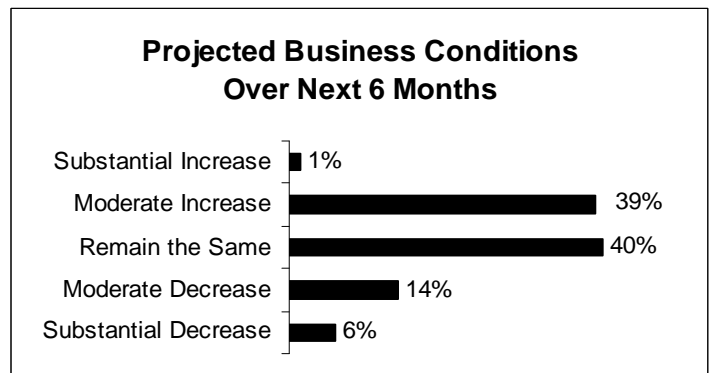
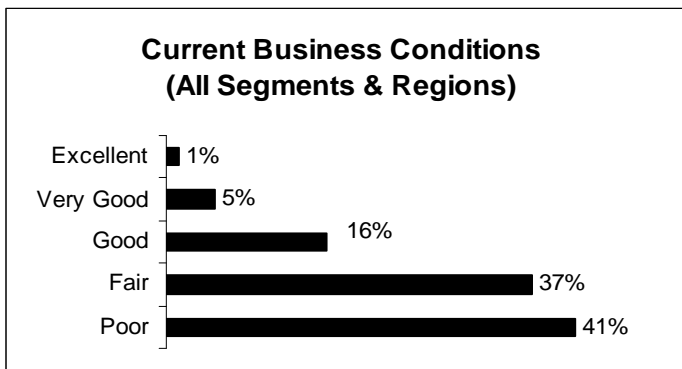


ALL SECTORS
 (324 survey responses ... 22% of NTMA membership)

Total Number of Skilled Employees: 15,495 (at December 31, 2008)
 13,764 (at June 30, 2009)

Current Average Work Week Per Skilled Employee: 39.7 hours

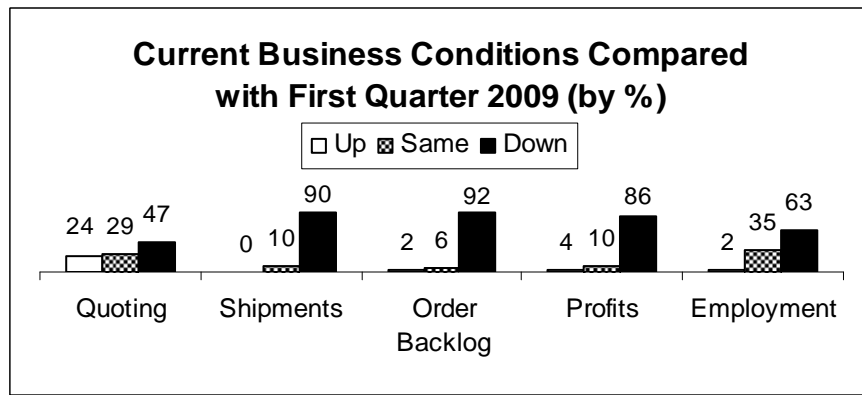
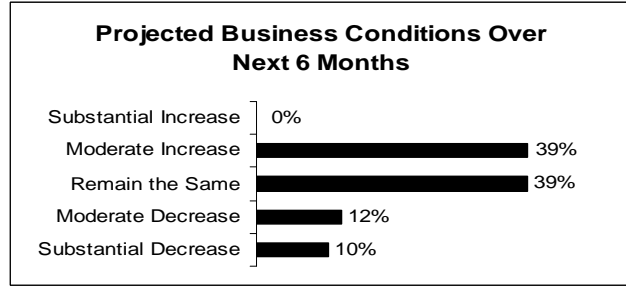
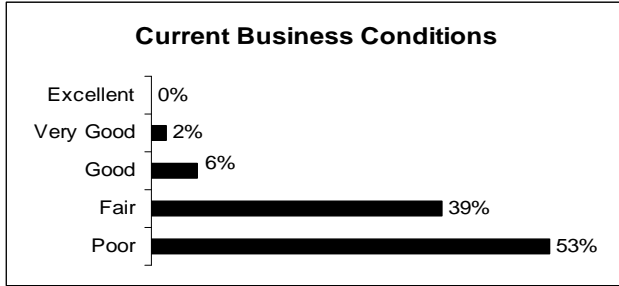
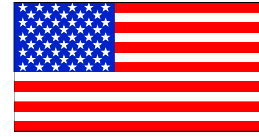
Average Future Work on Order Books: 11.1 weeks



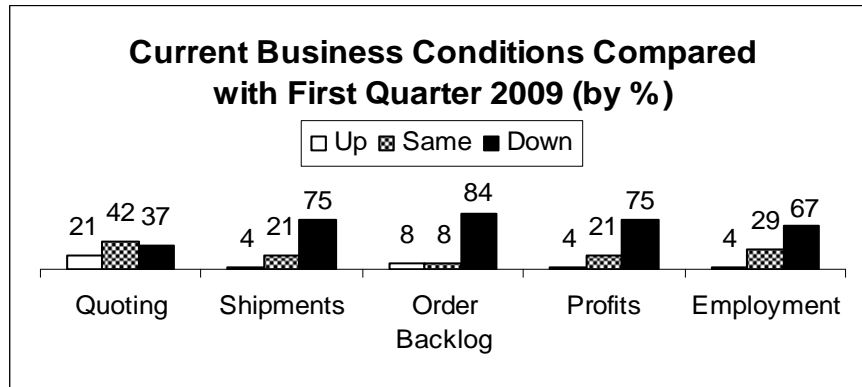
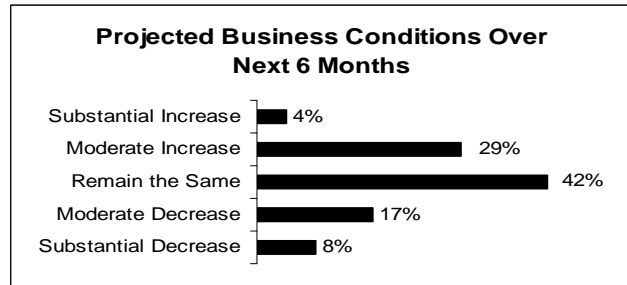
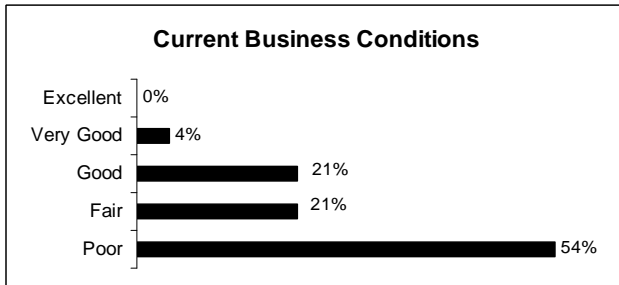
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USA

TOOL, DIE & FIXTURE SECTOR
 (49 survey responses)

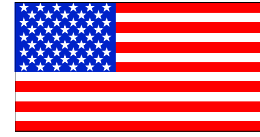


MOLD SECTOR
 (37 survey responses)

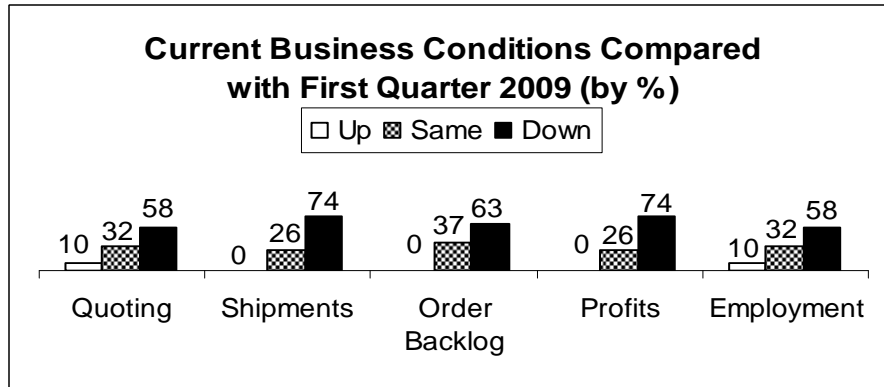
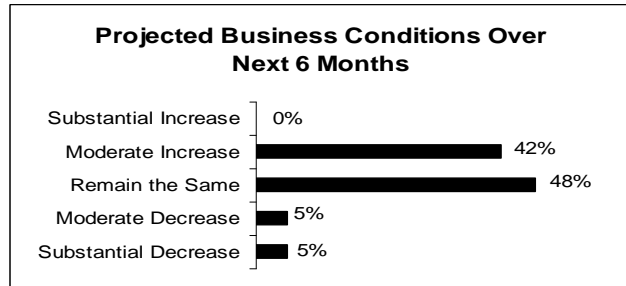
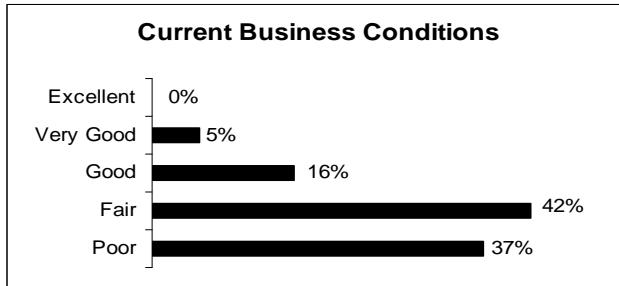


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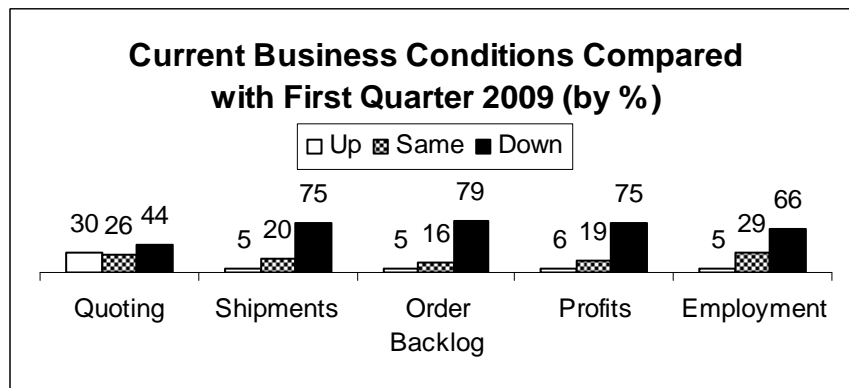
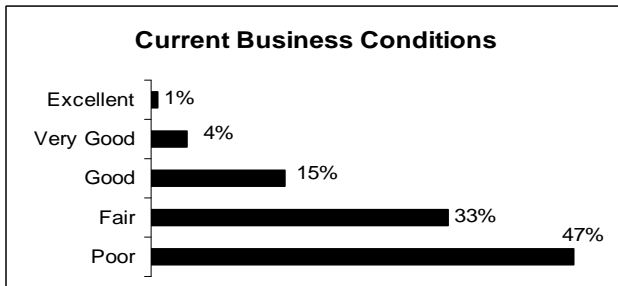
USA



SPECIAL MACHINES SECTOR
(19 survey responses)



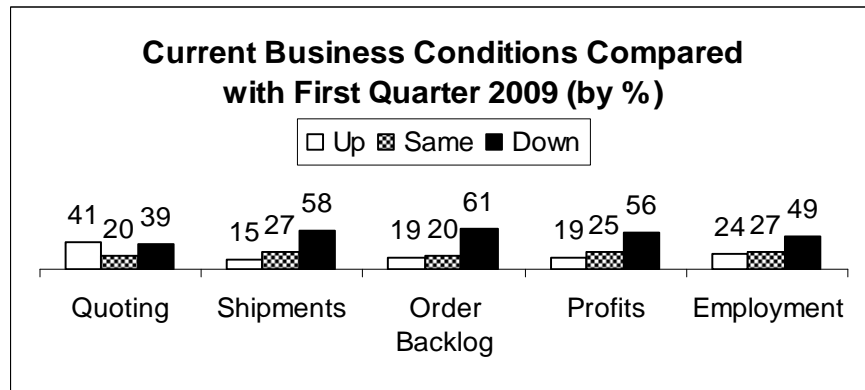
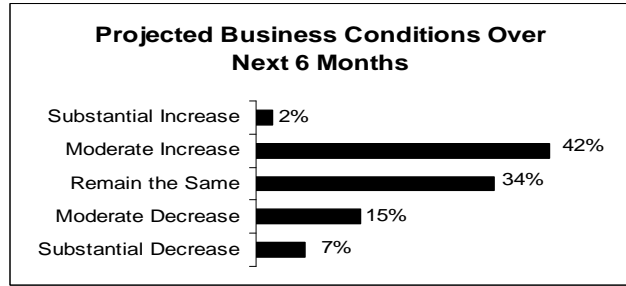
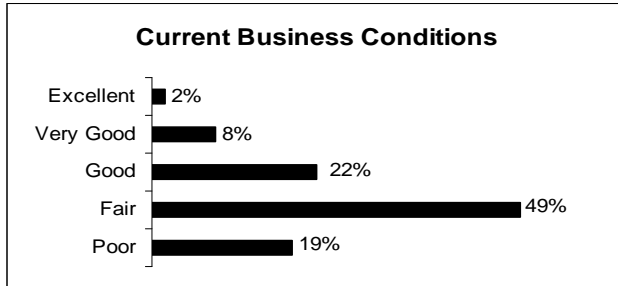
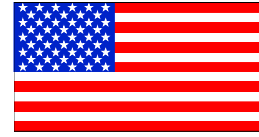
PRECISION MACHINING SECTOR (excluding Aerospace)
(149 survey responses)



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USA

AEROSPACE MACHINING & FABRICATION SECTOR
(59 survey responses)



METAL FABRICATION & STAMPING
(24 survey responses)

