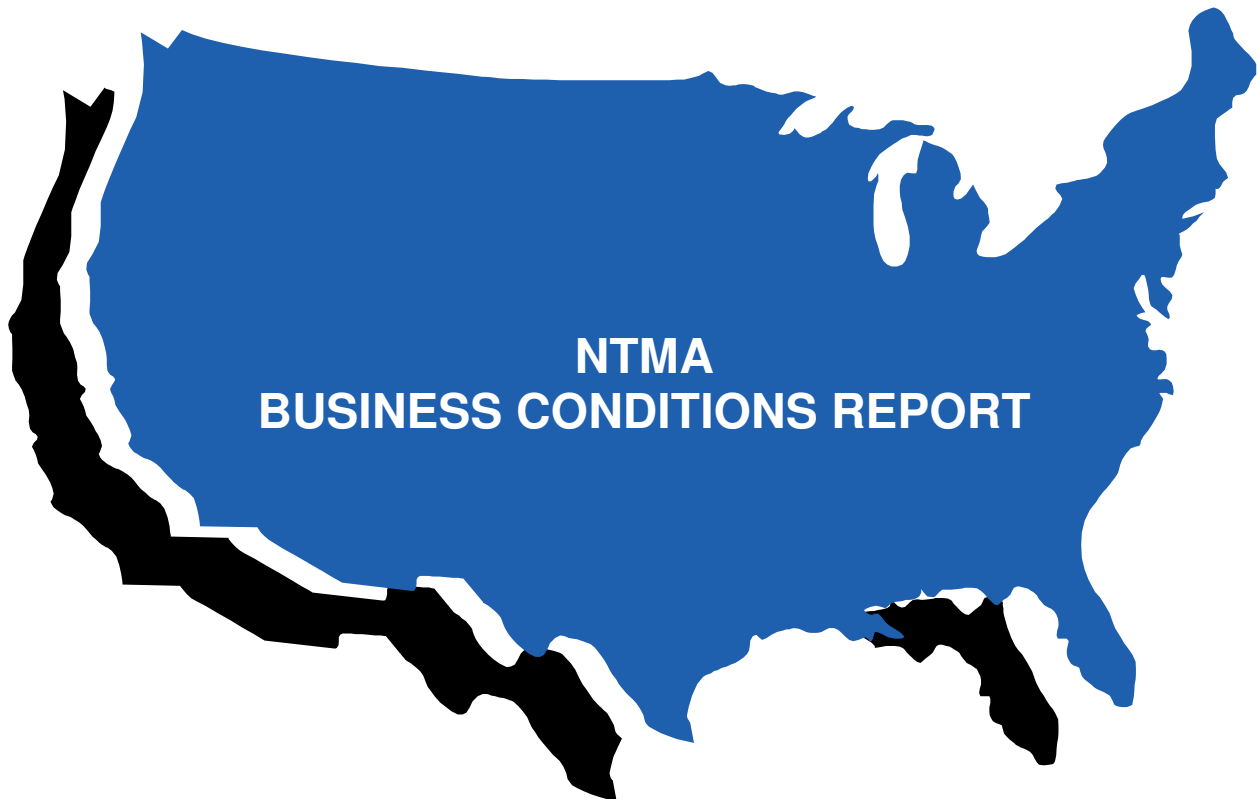




**NATIONAL TOOLING AND  
MACHINING ASSOCIATION**



**Prepared August 2020  
(for the period ending June 30, 2020)**

- **Overall Survey Results**
- **Results by Industry Segment**
- **Results by Geographic Region**



September 28, 2020

Dear NTMA Member:

This NTMA Business Conditions Report; dated June 30, 2020, obviously comes out during one of the most challenging times for our businesses and our country. It is our hope that this benchmarking information will be helpful and informative to you.

This report covers the first half of 2020, a projection for the second half of 2020, and is a geographical “snapshot” of business trends and conditions in the special tooling and machining industry.

This Report, is based on information from 111 NTMA member companies, up from 57 companies in December 2019. Results indicate that overall business conditions during the 6-month period ending June 30, 2020 were “Very Good to Excellent” for 18% of respondents, down from the previous report of 44%. Looking ahead, 44% are projecting that the next six months will bring a “Moderate-to-Substantial Increase” in business conditions, this being down from 63%.

Average work week per employee increased to 49 hours up from 43 hours, while future work on the books remained at 16 weeks.

Of those companies participating, the industry segment breakdown was as follows;

- 49% of participants reported Aerospace & Ordnance as 43% of their business
- 43% of participants reported Medical as 23% of their business
- 32% of participants reported Automotive as 24% of their business
- 55% of participants reported Other as 29% of their business

Of all the companies participating, 81% they were actively soliciting new customers.

A special thanks to all of the NTMA member companies that participated in the June 2020 NTMA Business Conditions Report. We appreciate your support of this benchmarking survey.

Sincerely,

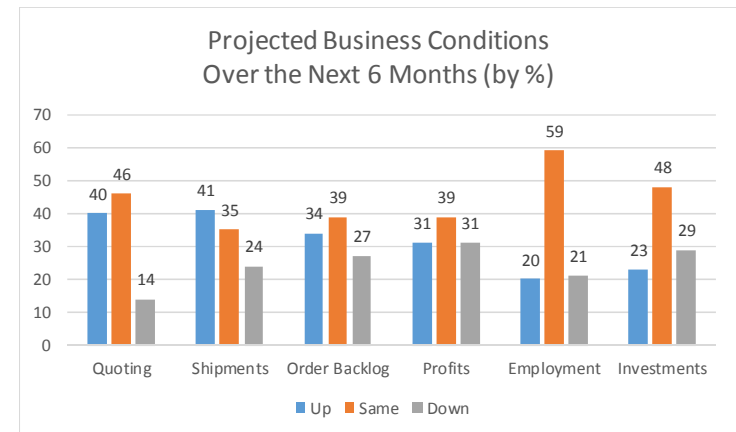
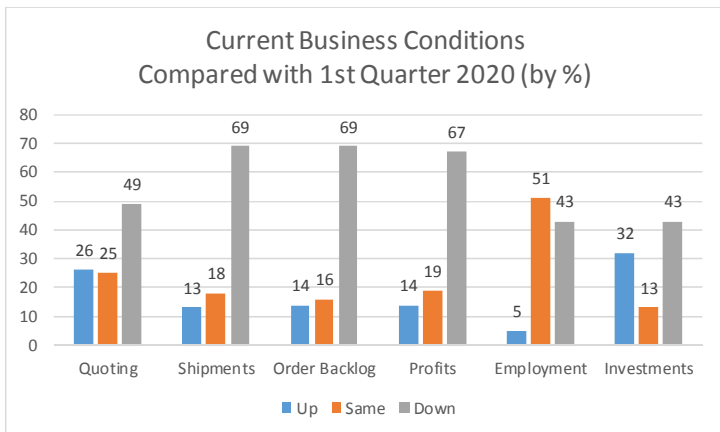
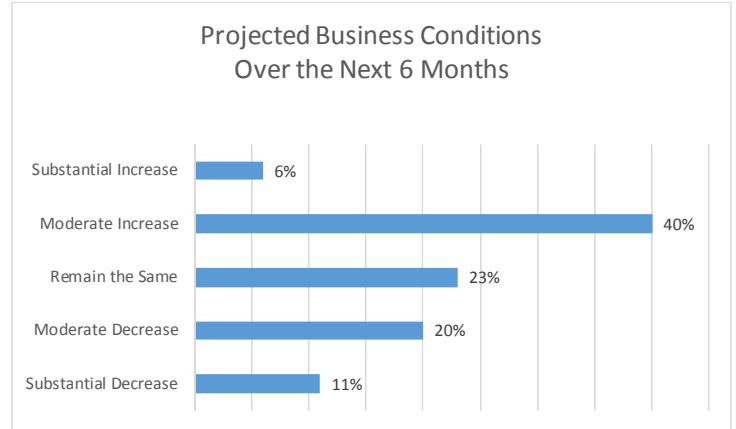
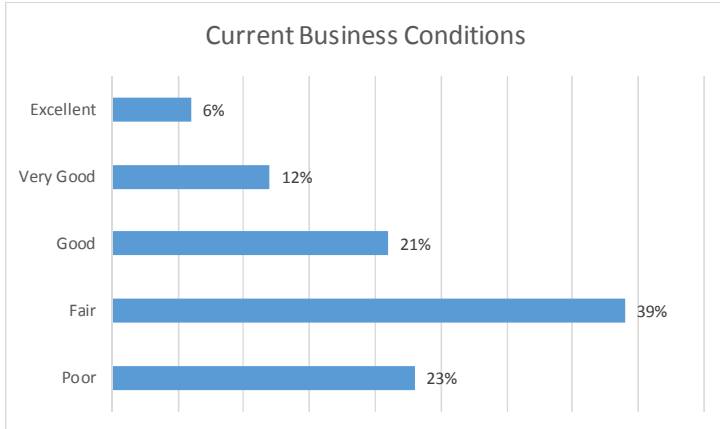
A handwritten signature in black ink, appearing to read "Roger Atkins", written in a cursive style.

Roger Atkins  
President



## June 2020 NTMA Business Conditions Report

Based on responses from 111 NTMA member companies.

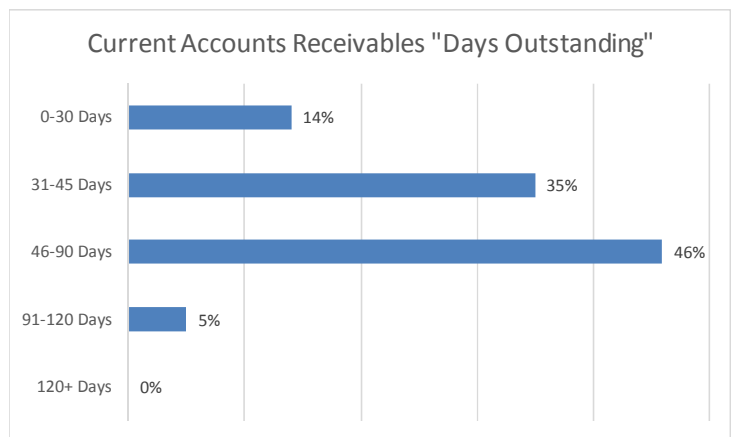


**Total employees on December 31, 2019: 5,030**

**Total employees on June 30, 2020: 4,778**

**Current Average Workweek per Skilled Employee (hours per week): 49 hours**

**Future Work on Books (Average): 16 weeks**



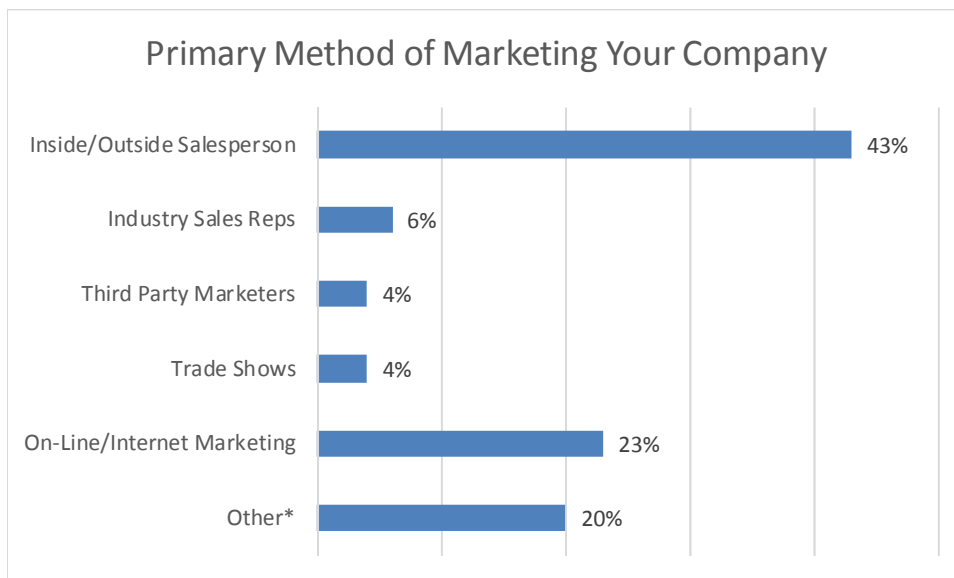
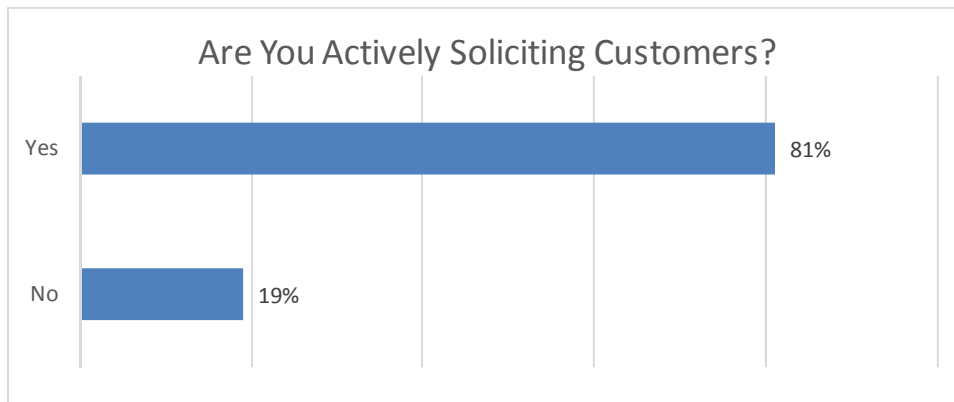
Thinking about the 3 industry segments that comprise the majority of your business, what percentage is devoted to each?

49% of Participants reported that Aerospace & Ordnance is an average 43% of their business

43% of Participants reported that Medical is an average 23% of their business

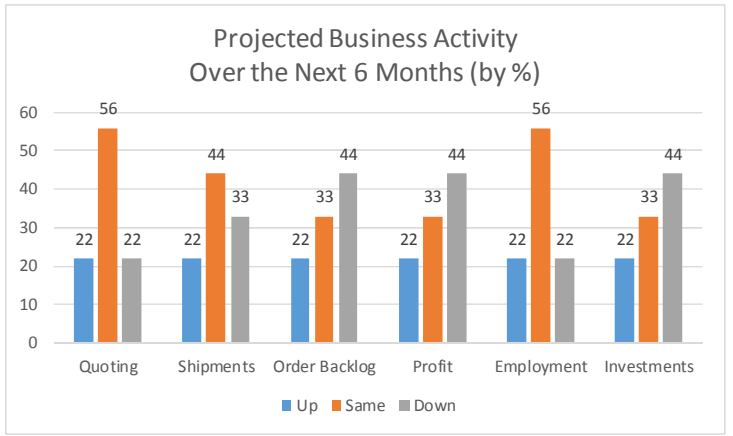
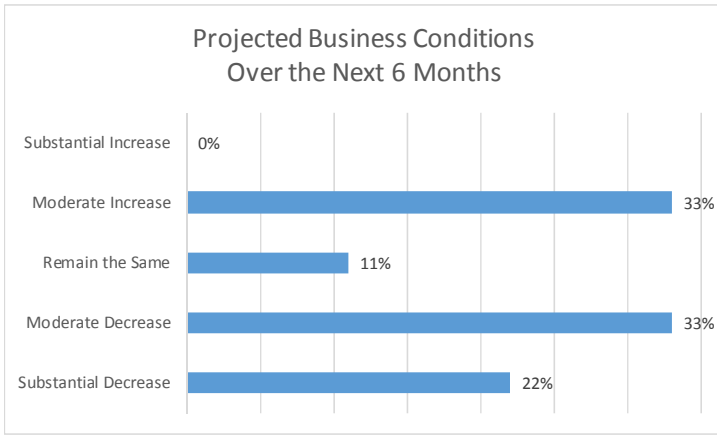
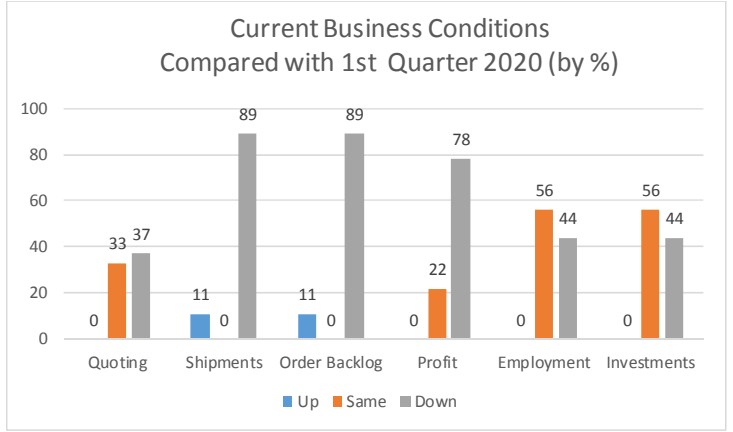
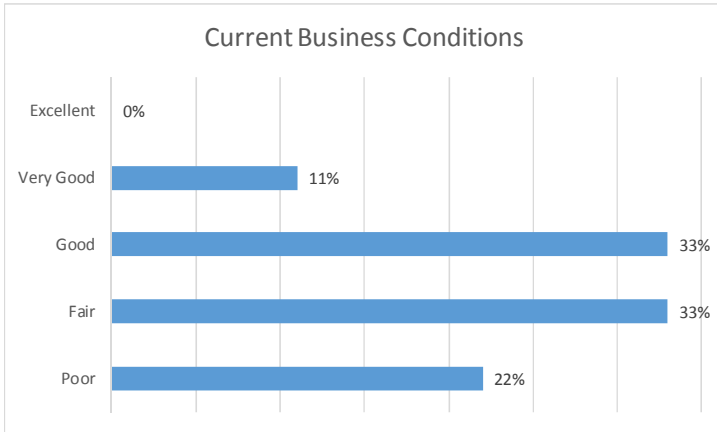
32% of Participants reported that Automotive is an average 24% of their business

In closing 55% of Participants reported that a combination of Other Industries (not listed) were on average 29% of their business

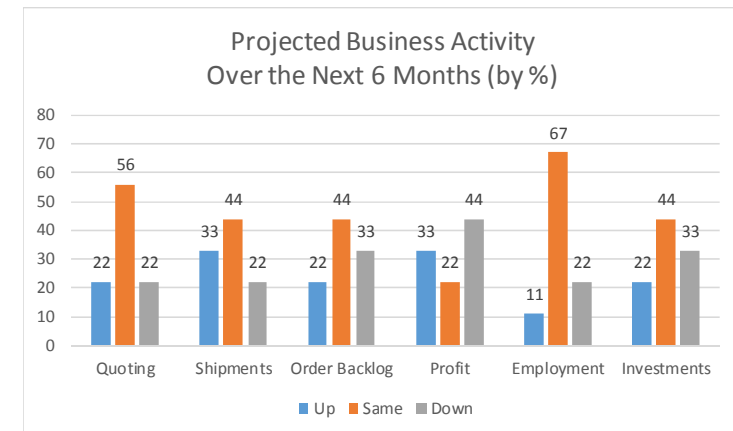
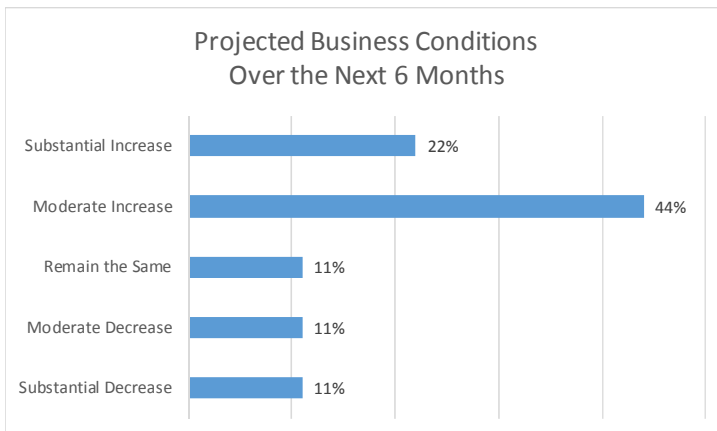
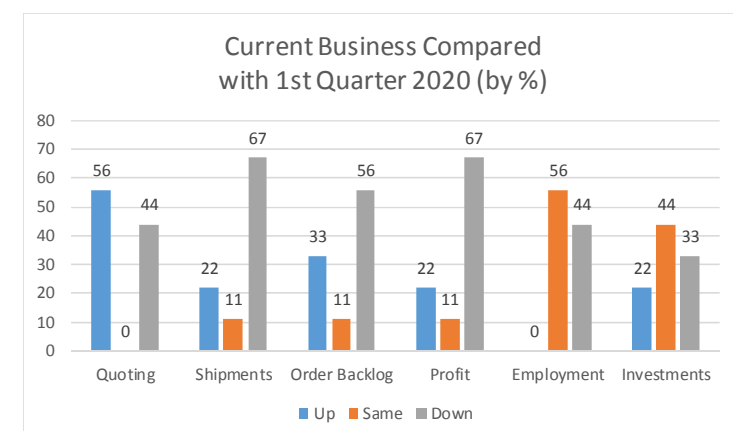
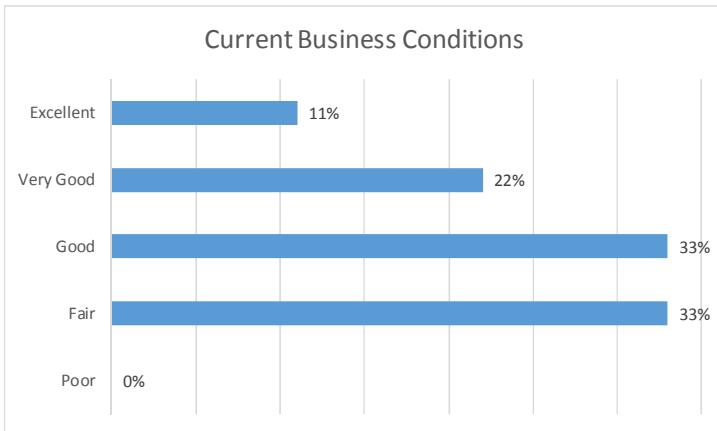


\*FACTUR, Referrals, Networking, Relationships, Reputation, Word-of-Mouth

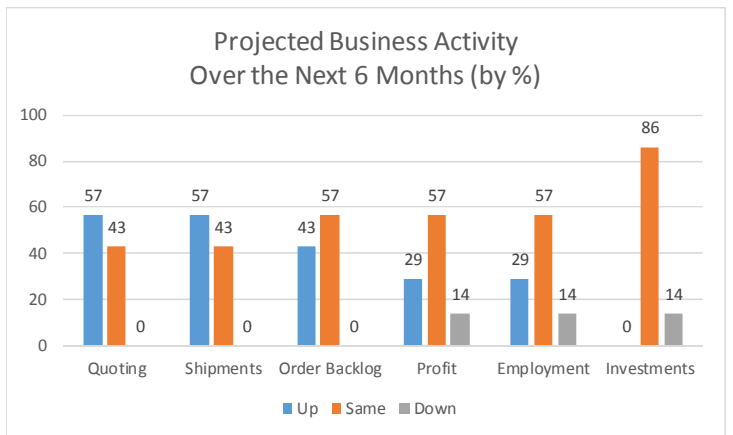
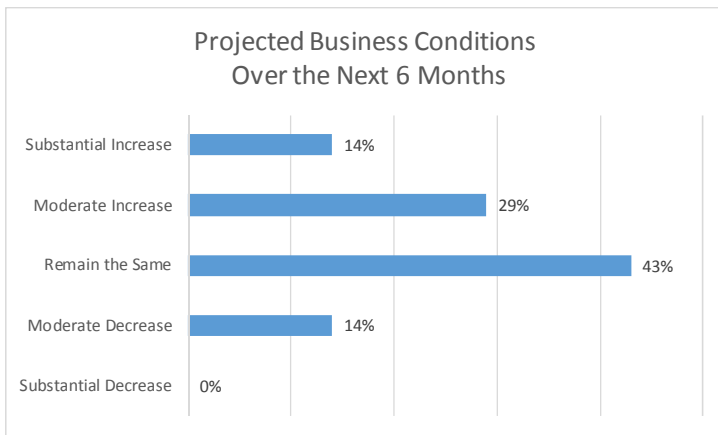
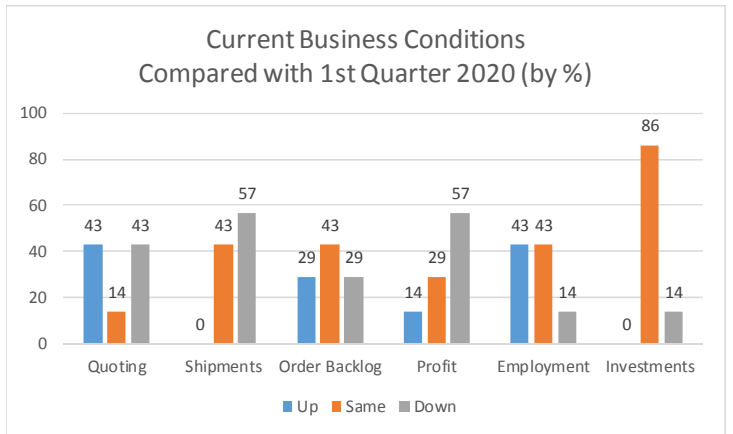
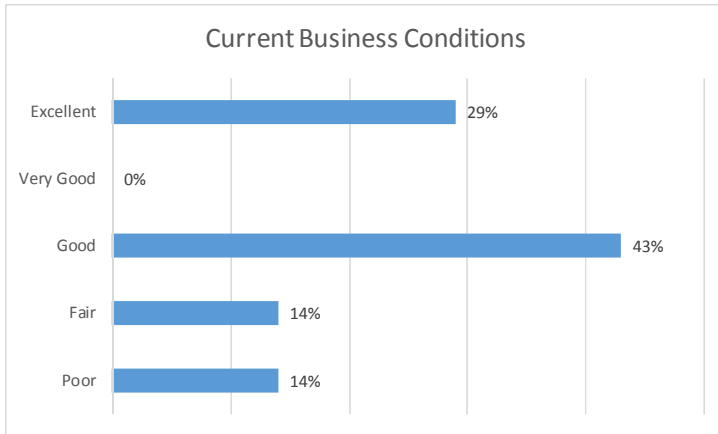
## Business Conditions by Industry Sector Tools, Die & Fixtures (9 responses)



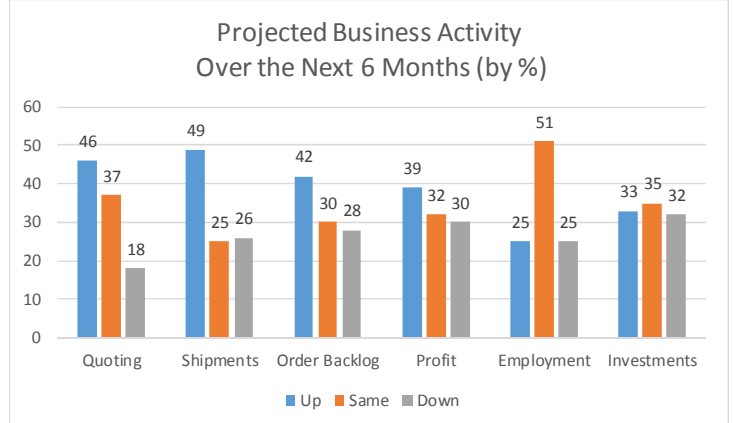
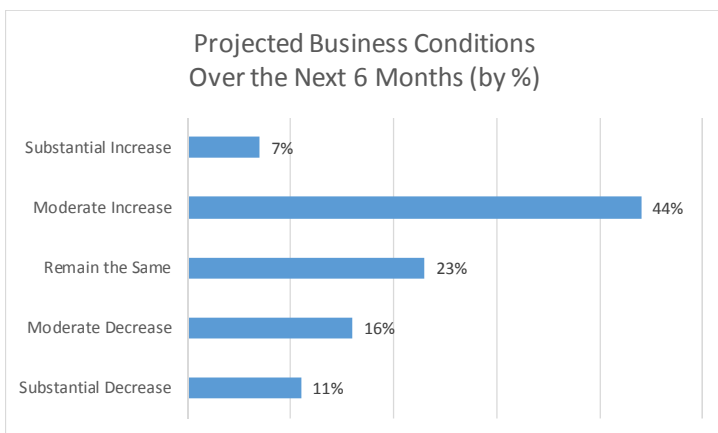
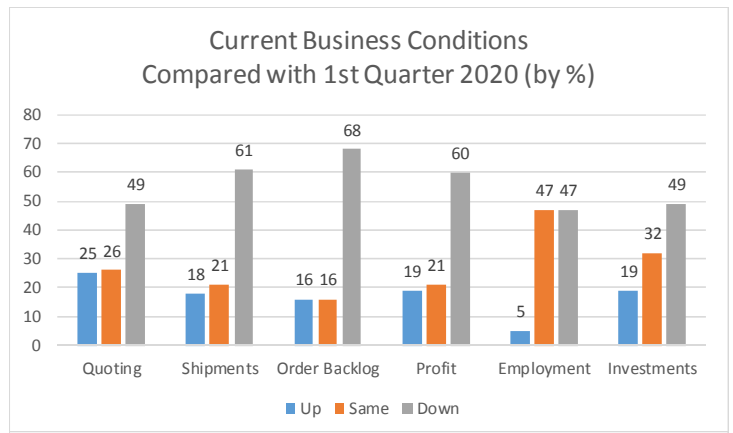
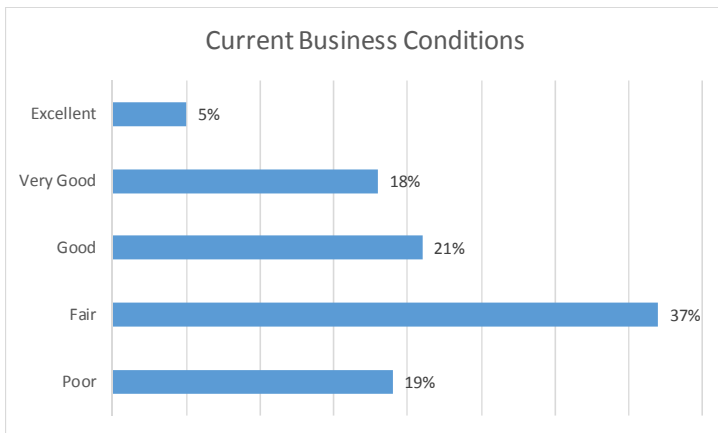
## Molds (9 responses)



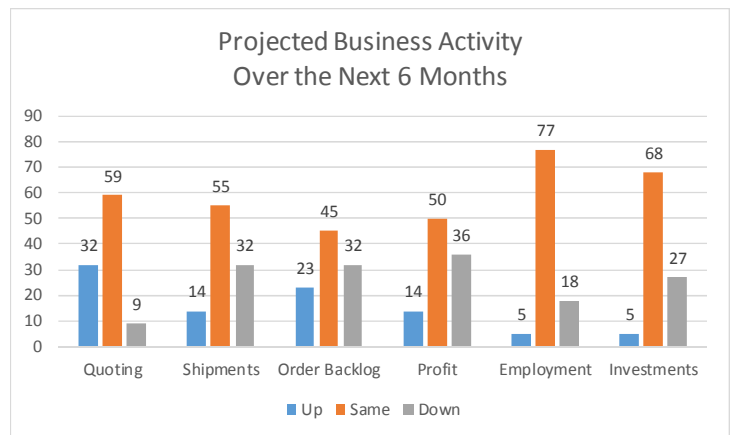
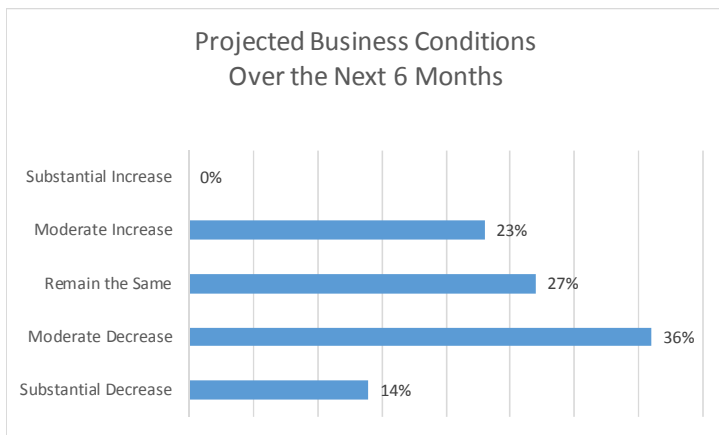
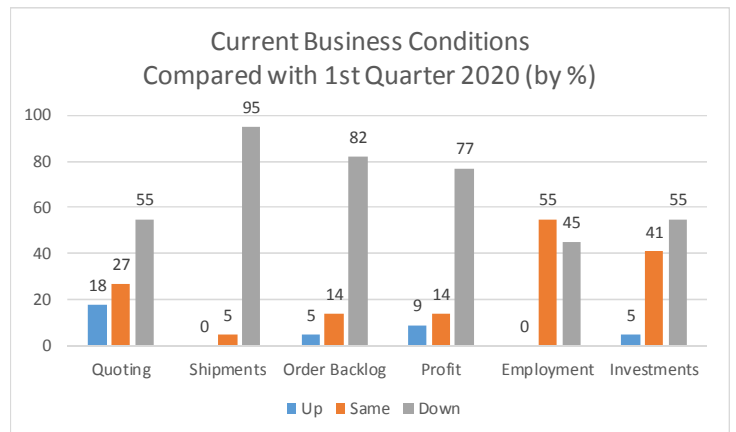
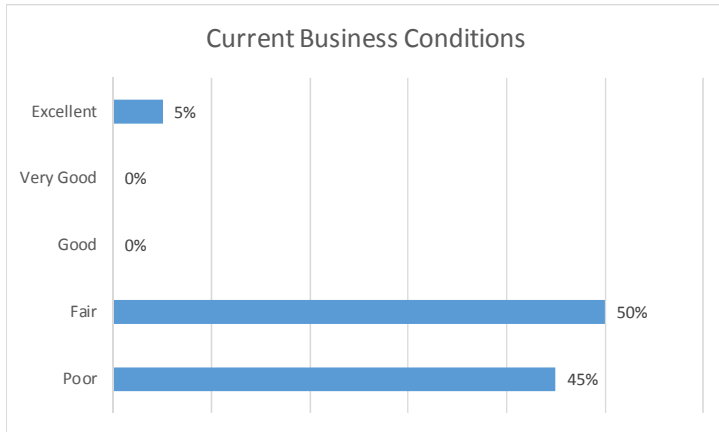
## Special Machines (7 response)



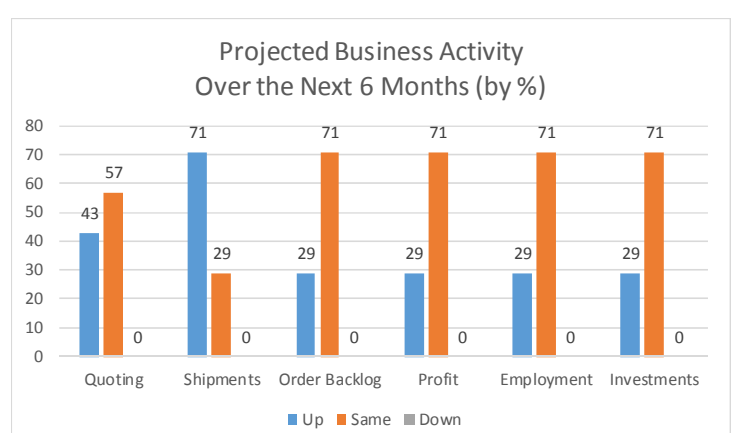
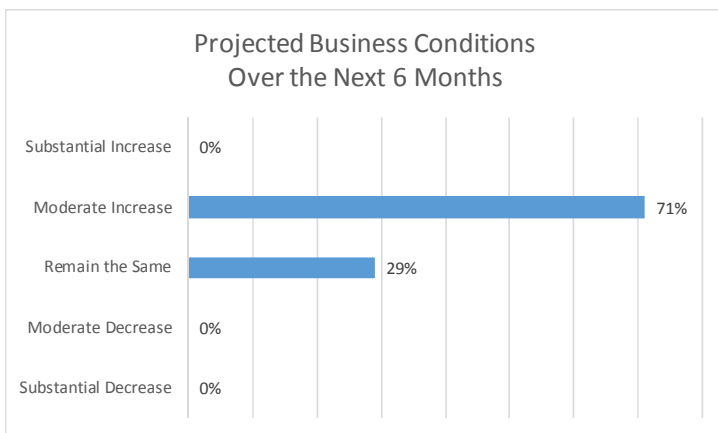
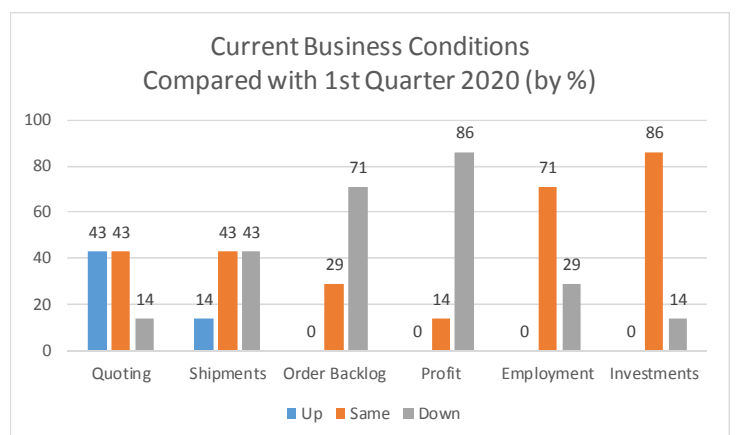
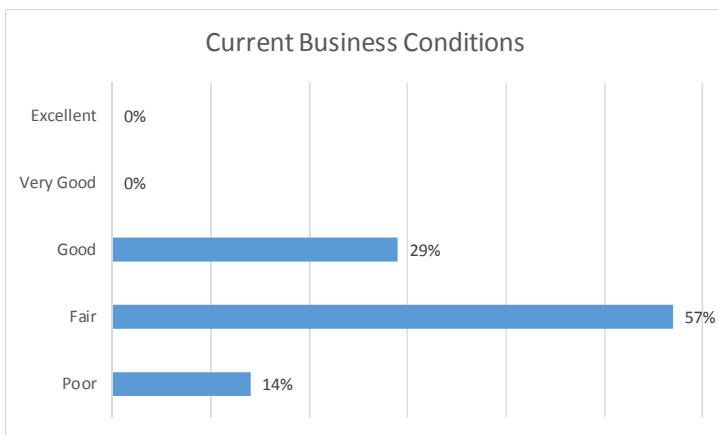
## Precision Machining excluding Aerospace (57 responses)



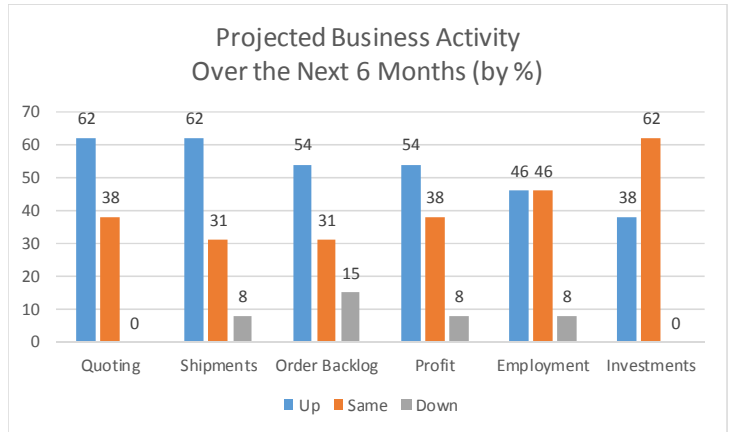
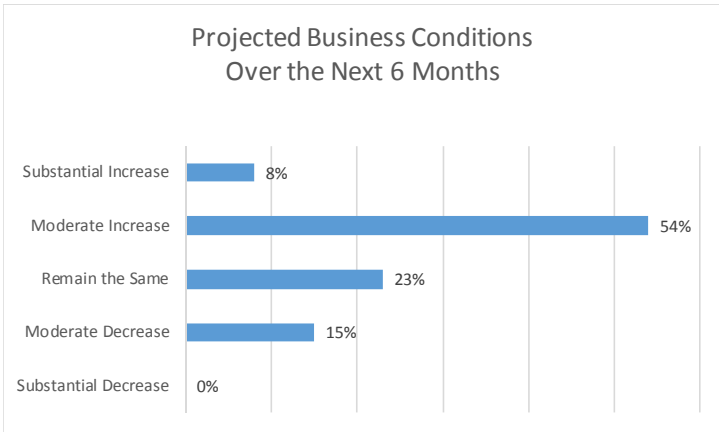
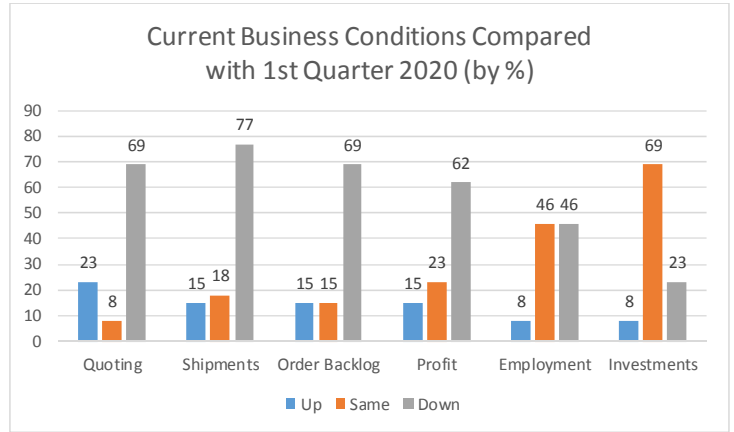
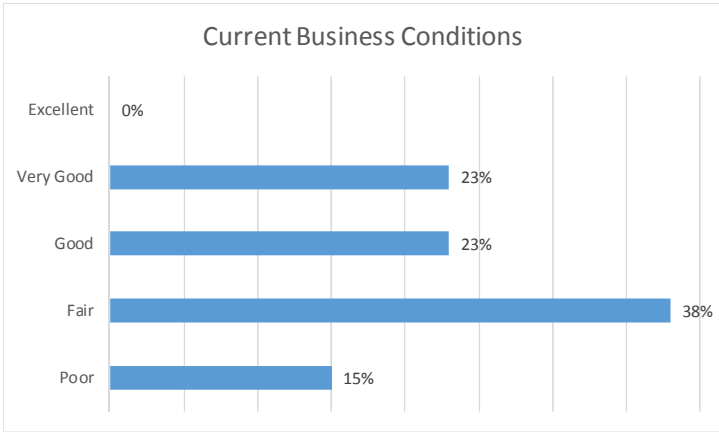
## Aerospace Machining & Fabrication (22 responses)



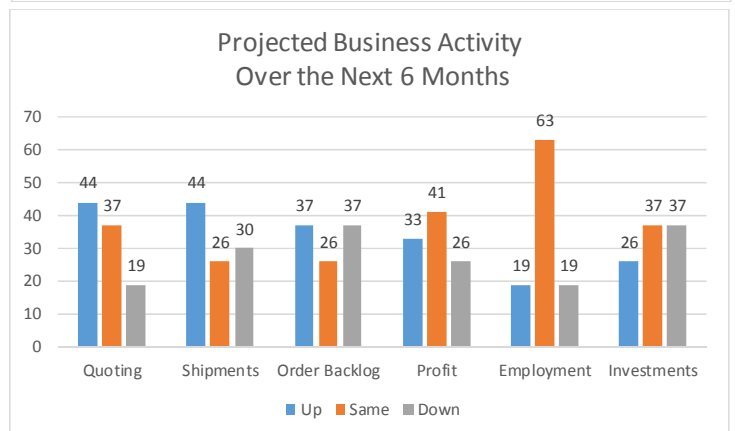
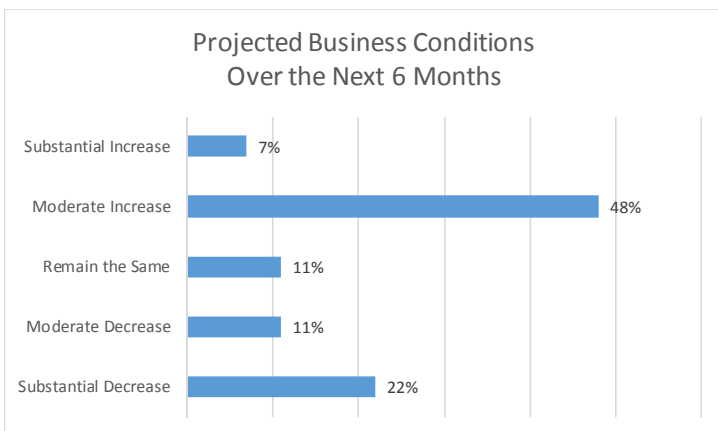
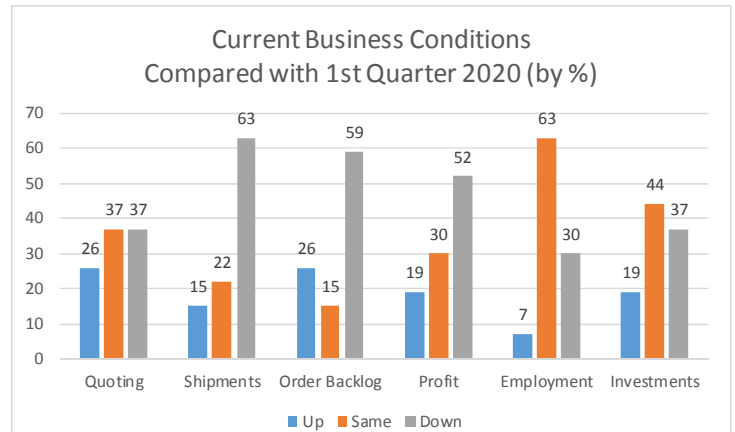
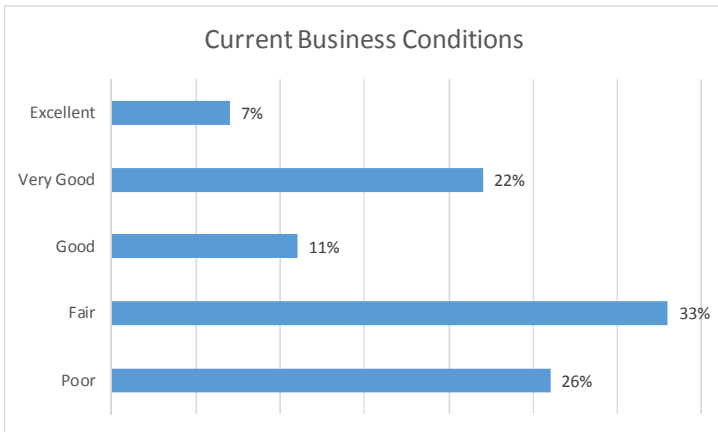
## Metal Fabrication & Stamping (7 response)



## BUSINESS CONDITIONS by Geographic Region NEW ENGLAND (ME, VT, RI, NH, MA, CT) – 13 responses

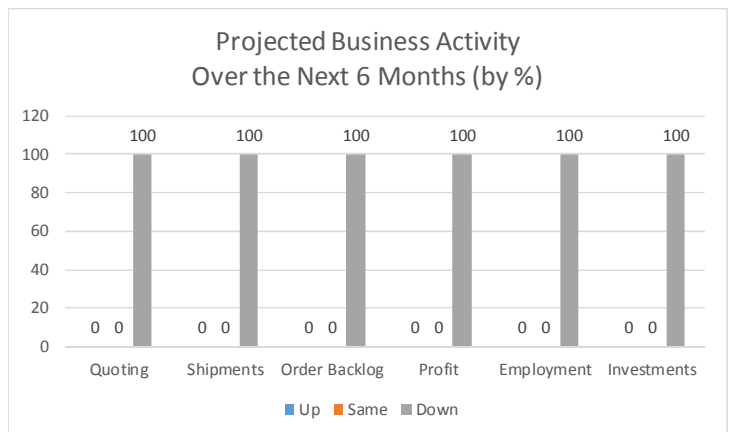
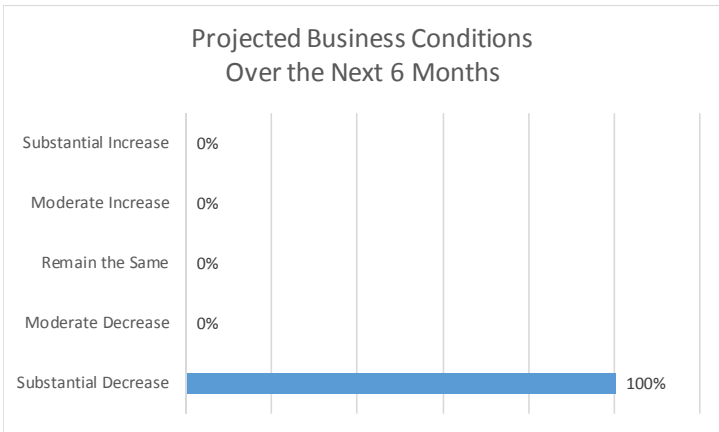
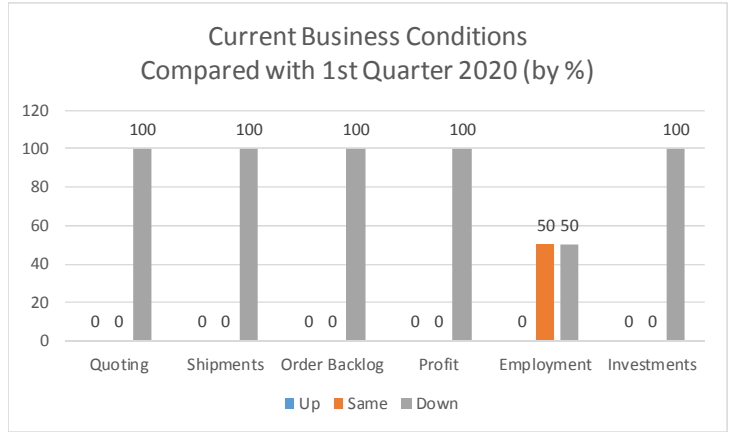
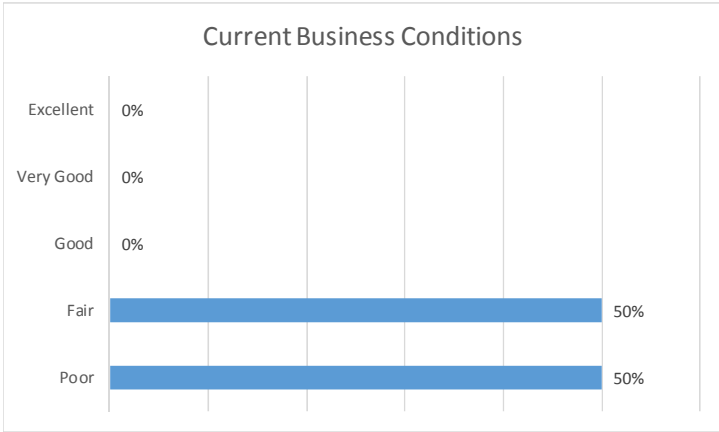


## NORTHEASTERN CENTRAL (DC, NY, PA, NJ, DE, MD, WV, VA) – 27 responses

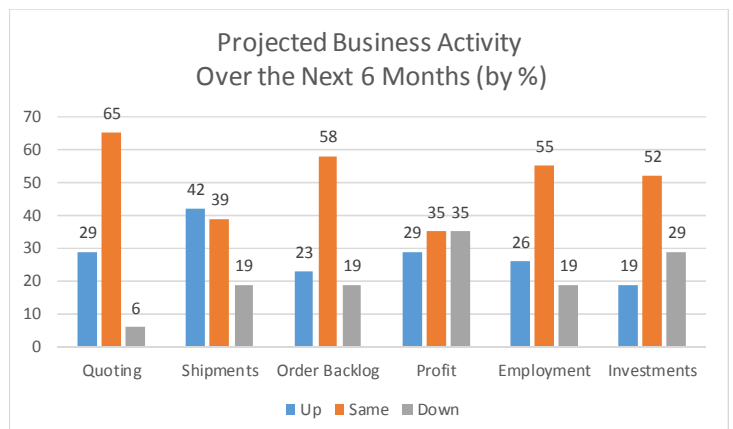
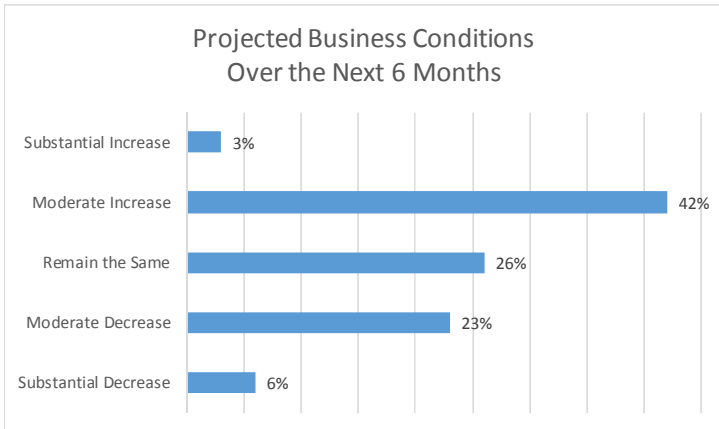
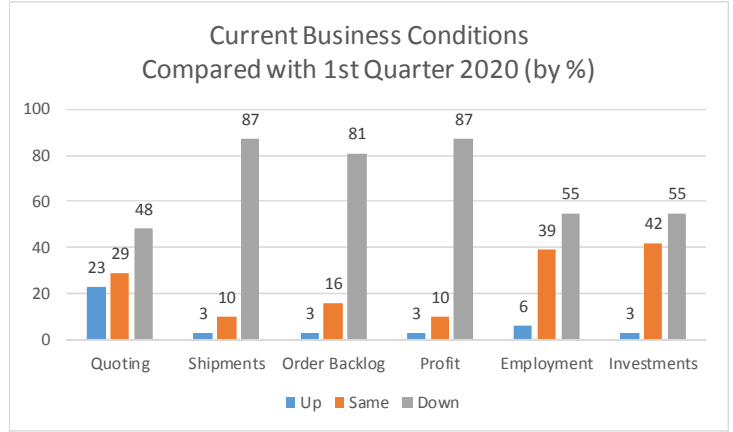
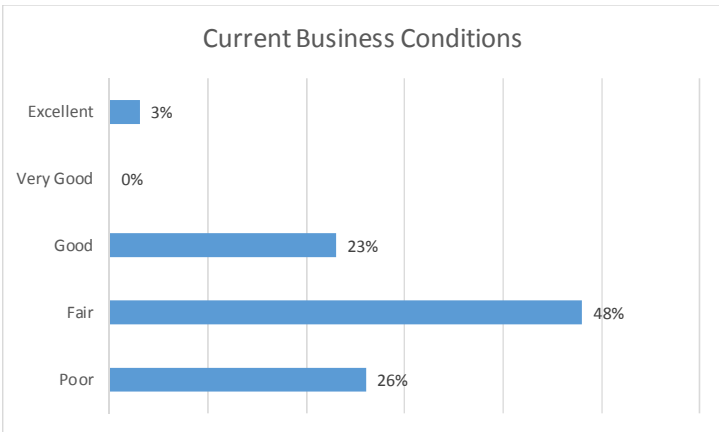




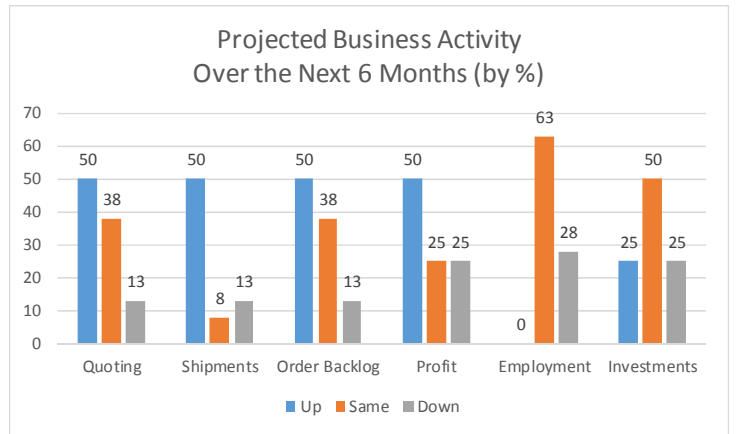
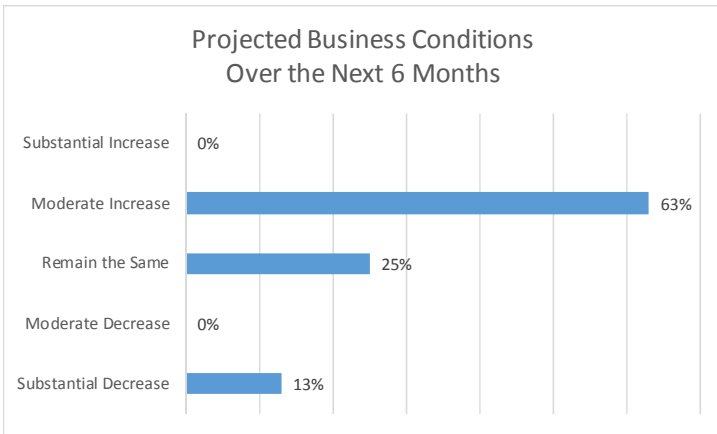
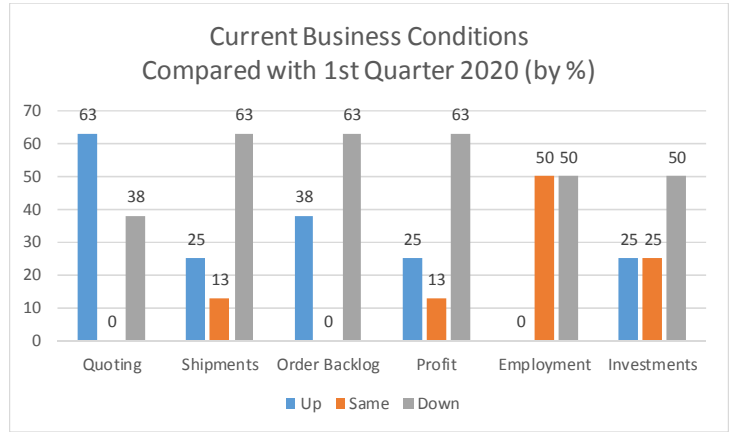
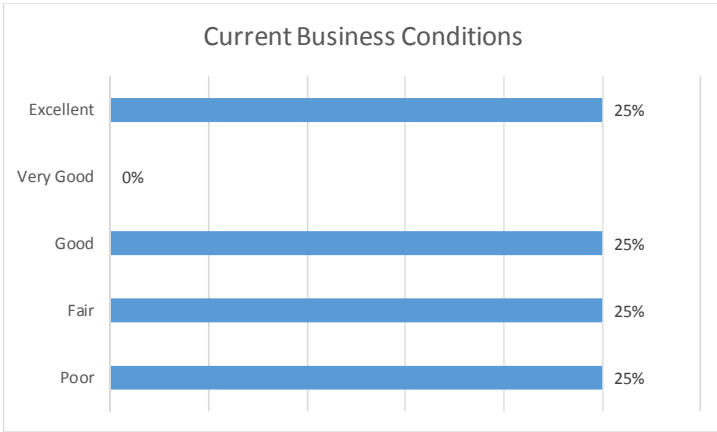
## SOUTHEASTERN (FL, KY, NC, SC, TN, GA, AL MS) – 2 responses



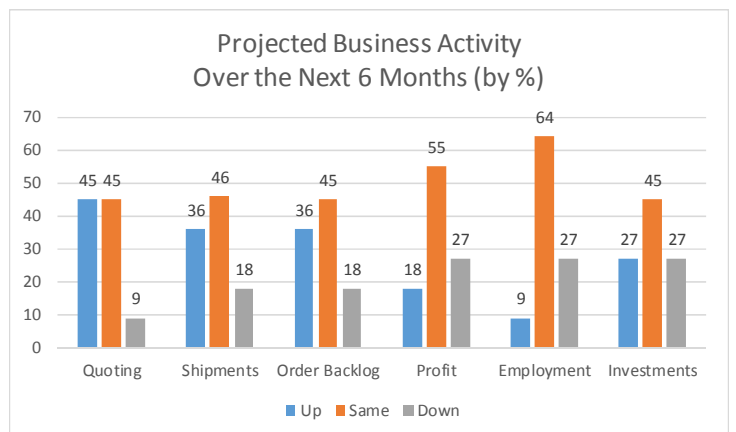
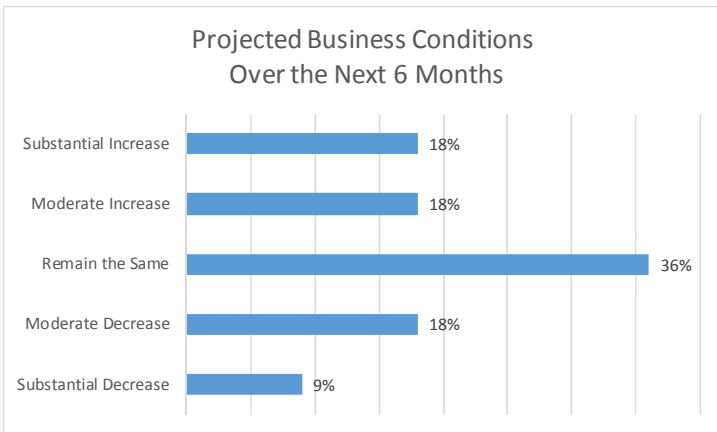
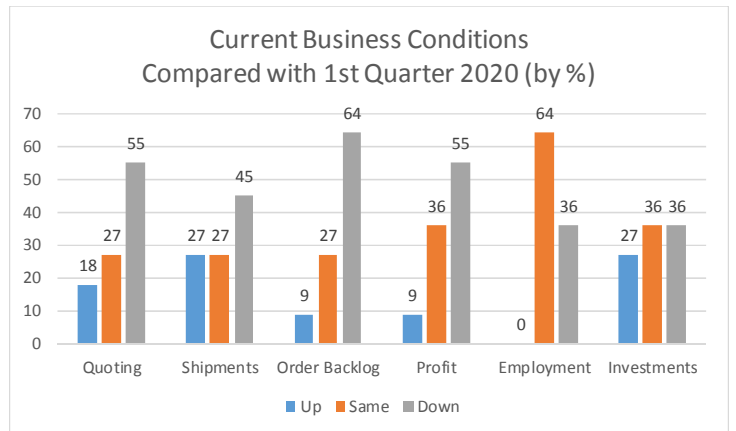
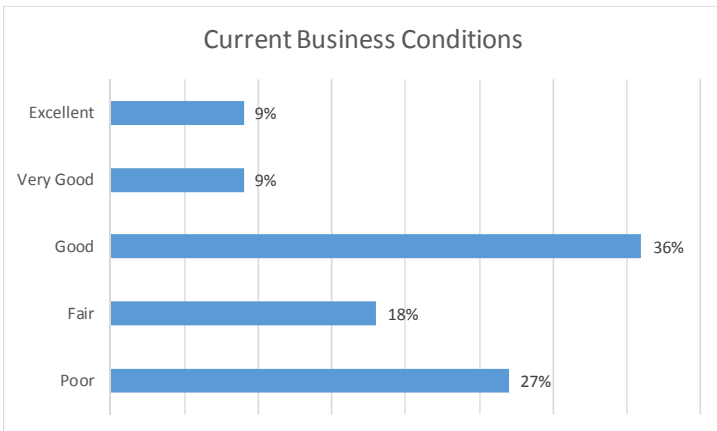
## NORTH CENTRAL (OH, MI, IL, IN, WI) – 31 responses



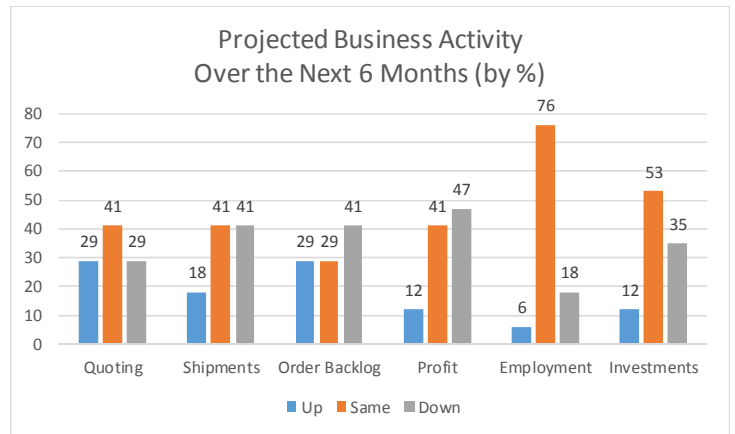
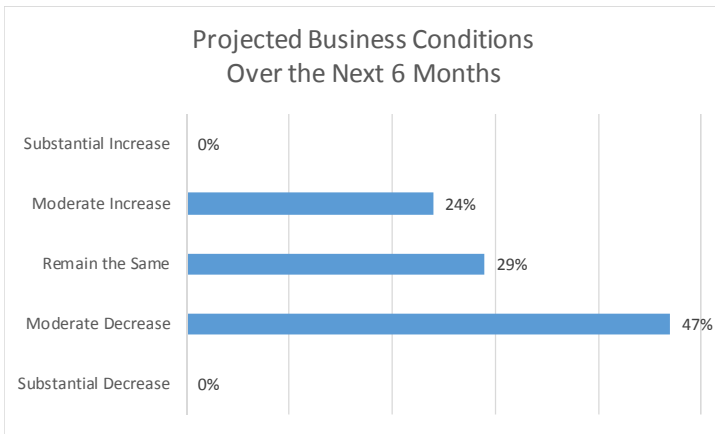
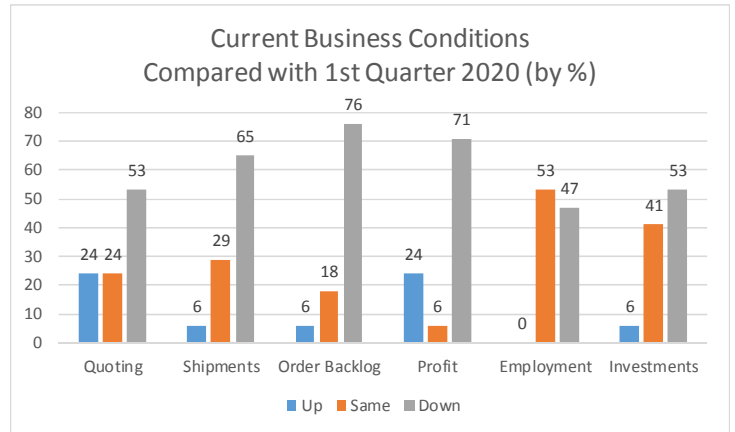
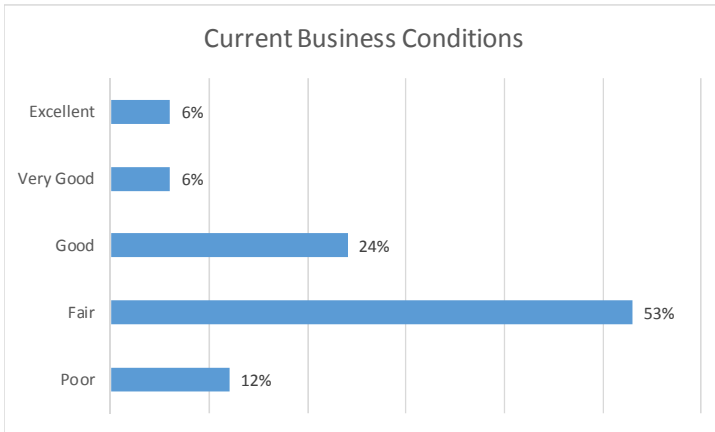
## CENTRAL (IA, MO NE, KS, MN) – 8 responses



## CENTRAL SOUTHWEST (AR, LA, OK, TX, NM, CO) – 11 responses



## GREATER PACIFIC SOUTHWEST (CA, NV, AZ, UT) – 17 responses



## GREATER NORTHWEST (ND, SD, MT, WY, ID, WA, OR) – 2 response

