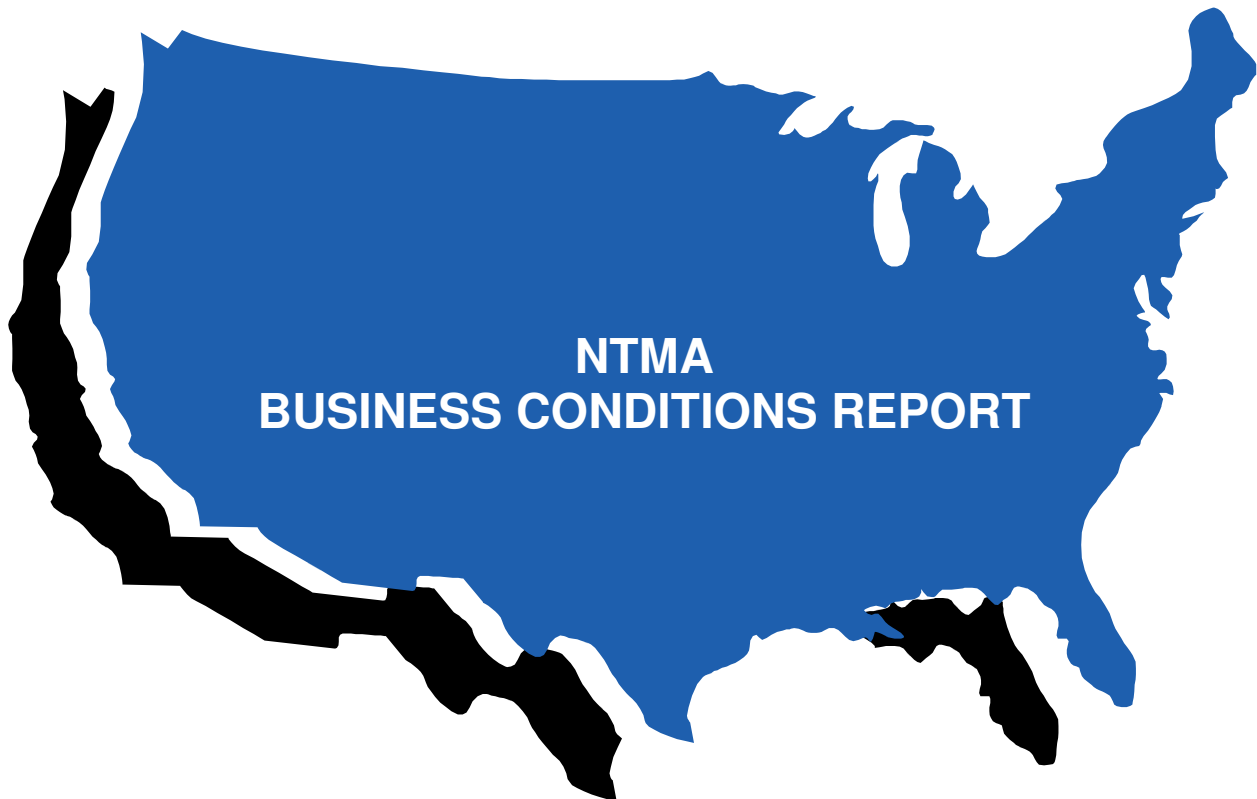




NATIONAL TOOLING AND  
MACHINING ASSOCIATION



**Prepared February 2021  
(for the period ending December 31, 2020)**

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



February 26, 2021

Dear NTMA Member:

This NTMA Business Conditions Report; dated December 31, 2020, comes out during one of the most challenging times for our businesses and our country. This report covers the second half of 2020, a projection for the first half of 2021, and is a geographical “snapshot” of business trends and conditions in the special tooling and machining industry.

This Report, is based on information from 122 NTMA member companies up from 111 in June 2020 report. Results indicate that overall business conditions during the 6-month period ending December 31, 2020 were “Good to Excellent” for 55% of respondents, up from the previous report of 39% ending June 2020. Looking ahead, 58% are projecting that the next six months will bring a “Moderate-to-Substantial Increase” in business conditions, this being up from 46% ending June 2020. Average work week per employee decreased from 49 to 42 hours, while the average future work on the books increased from 16 to 20 weeks from previous 6 months ending June 2020.

Of all the companies participating, 83% are actively soliciting new customers. Their primary method of marketing is inside/outside salespersons.

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

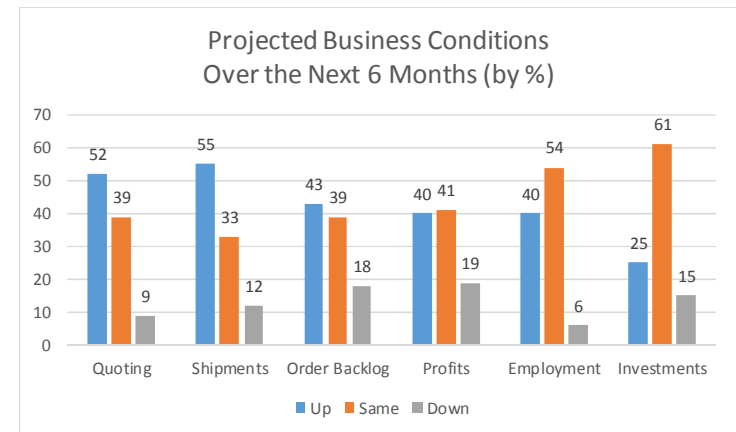
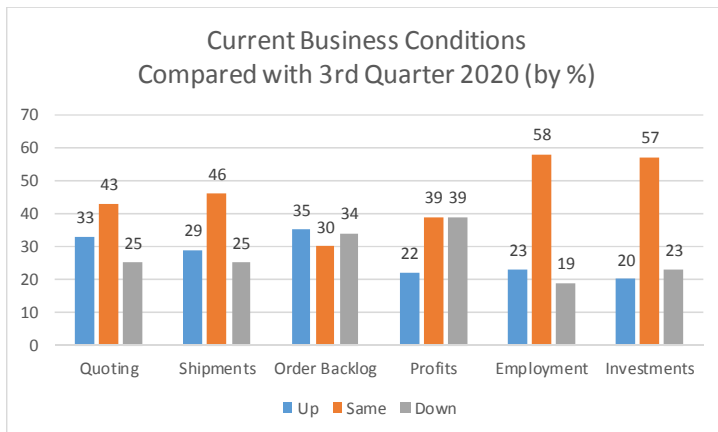
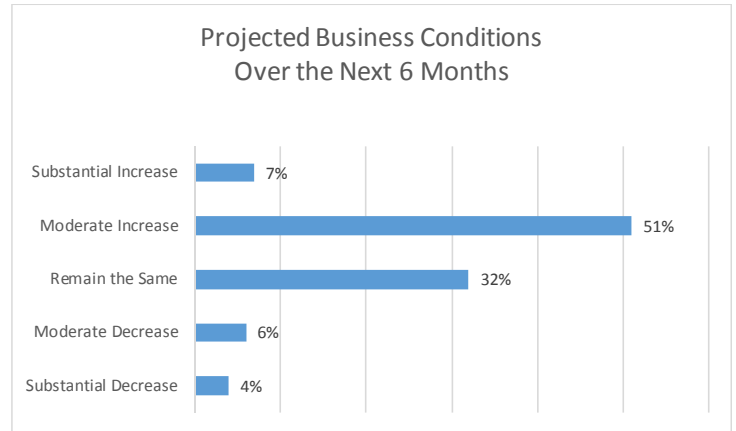
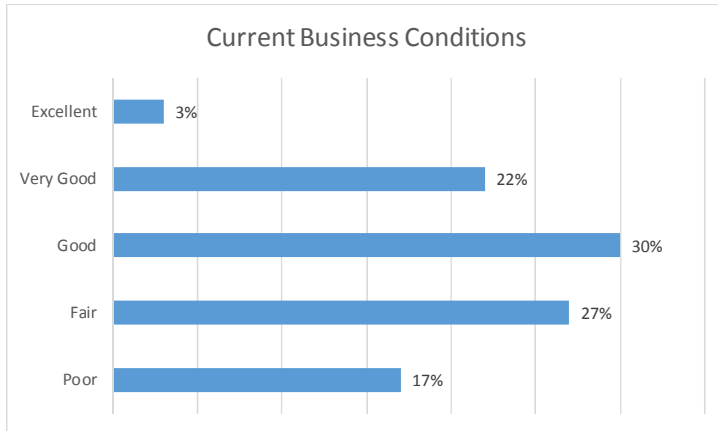
Sincerely,

Roger Atkins  
President



## December 2021 NTMA Business Conditions Report

Based on responses from 122 NTMA member companies.



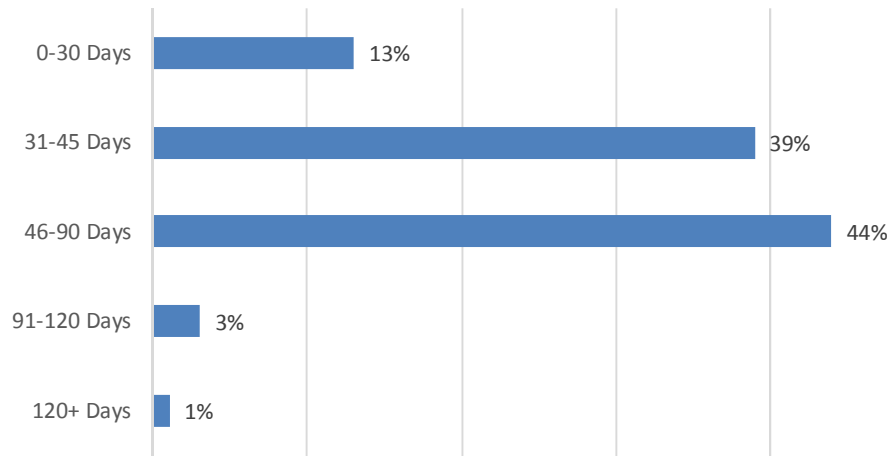
**Total employees on June 30, 2020: 7,357**

**Total employees on December 31, 2020 7,244**

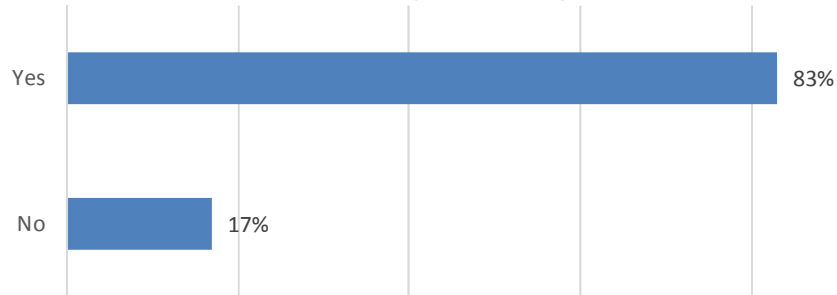
**Current Average Workweek per Skilled Employee (hours per week): 42 hours**

**Future Work on Books (Average): 20 weeks**

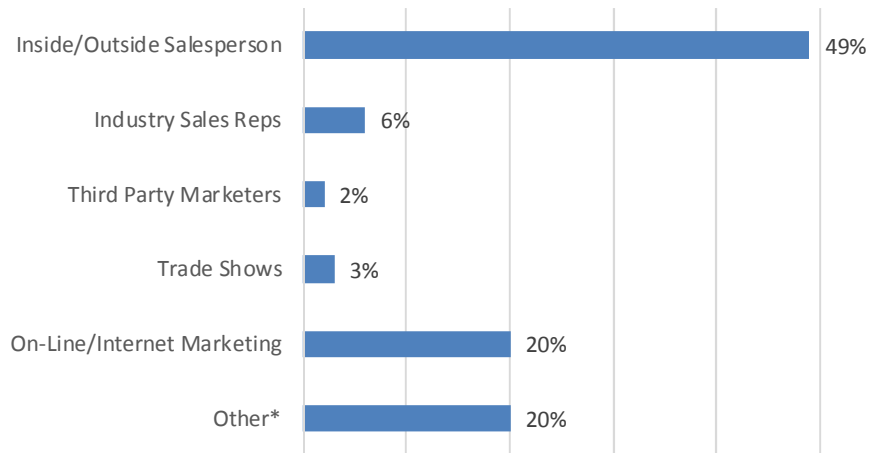
### Current Accounts Receivables "Days Outstanding"



### Are You Actively Soliciting Customers?



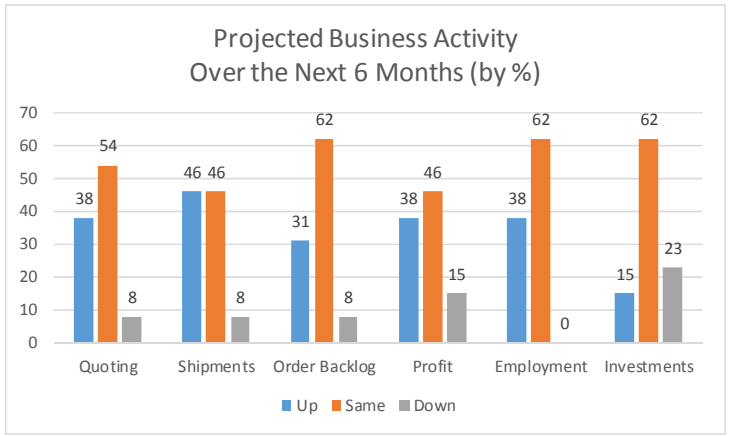
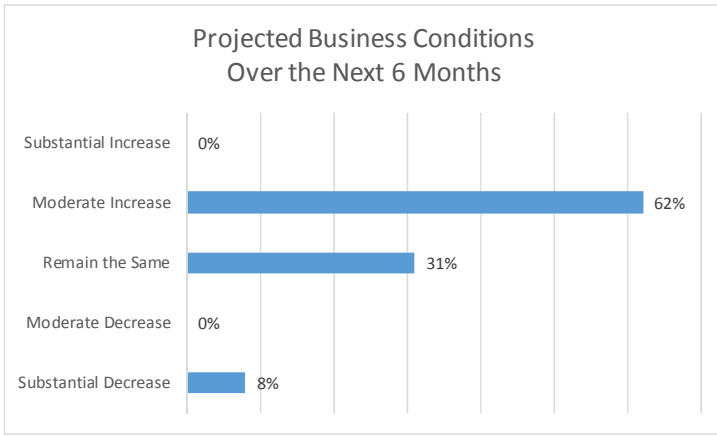
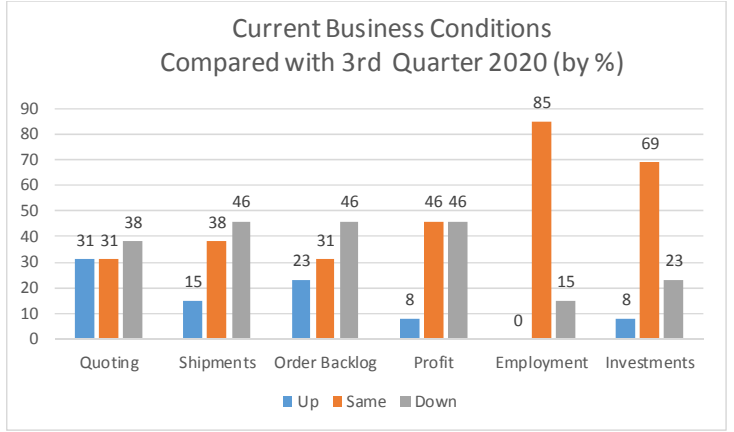
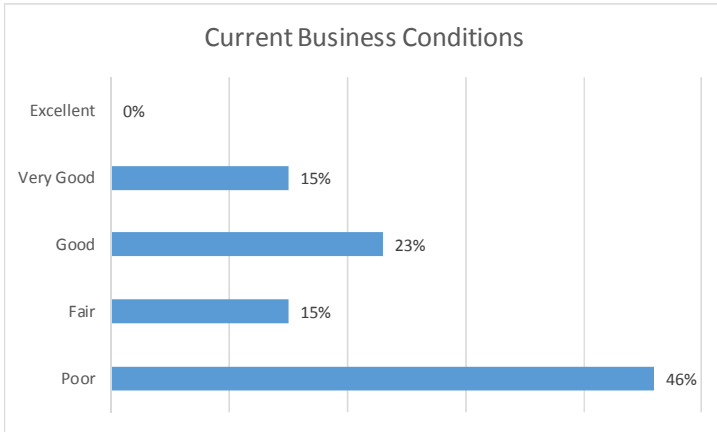
### Primary Method of Marketing Your Company



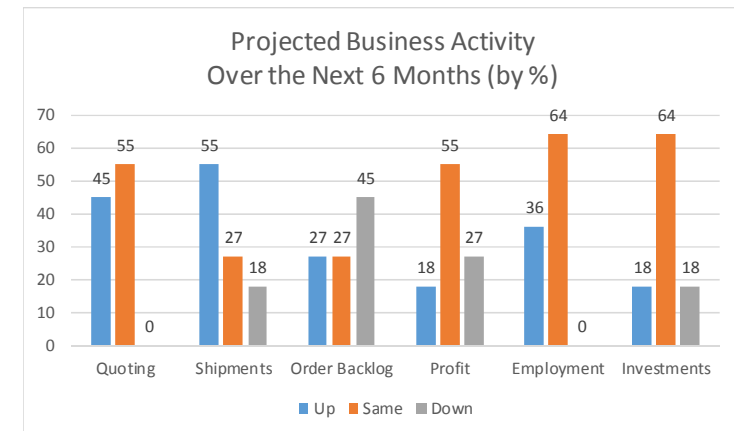
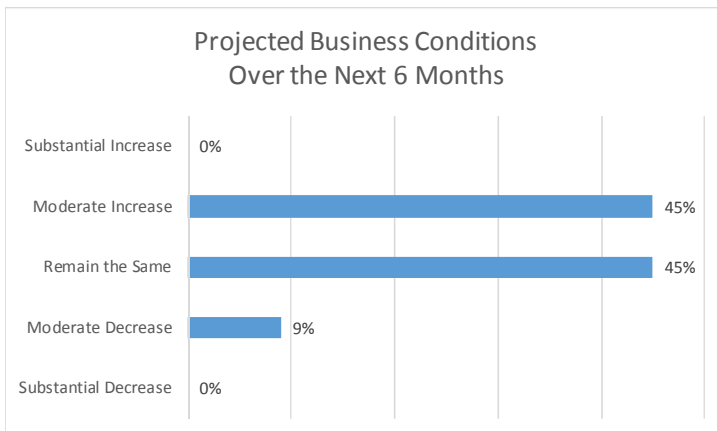
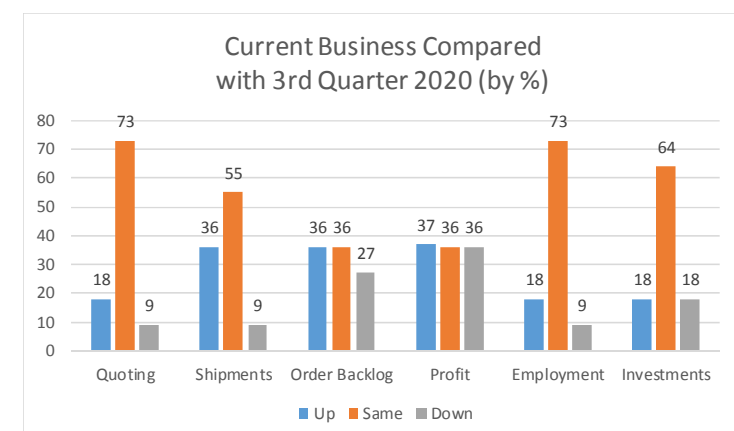
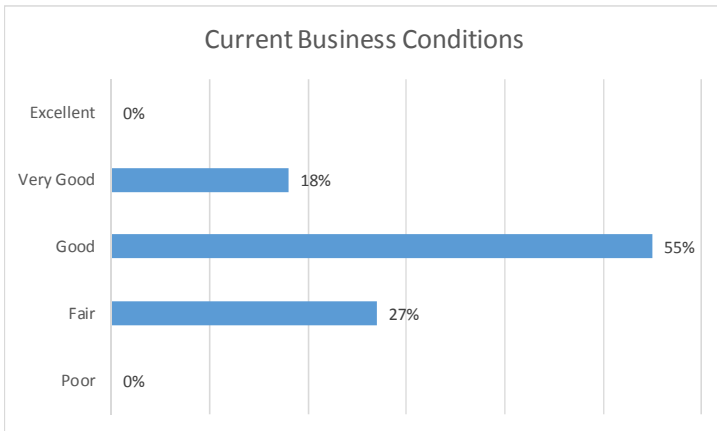
\*FACTUR, Referrals, Networking, Relationships, Reputation, Word-of-Mouth

## Business Conditions by Industry Sector

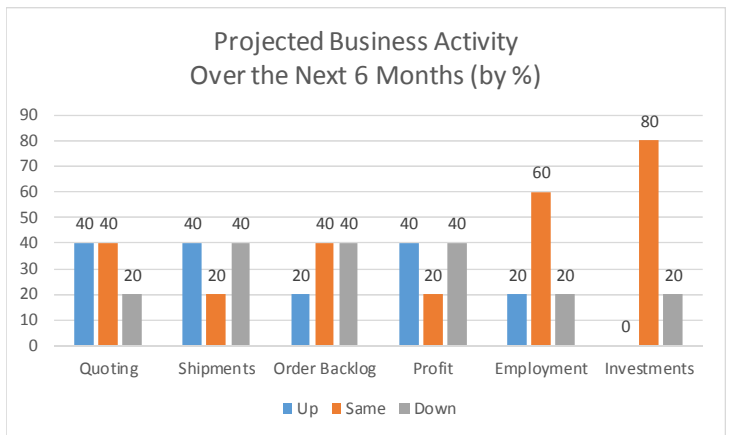
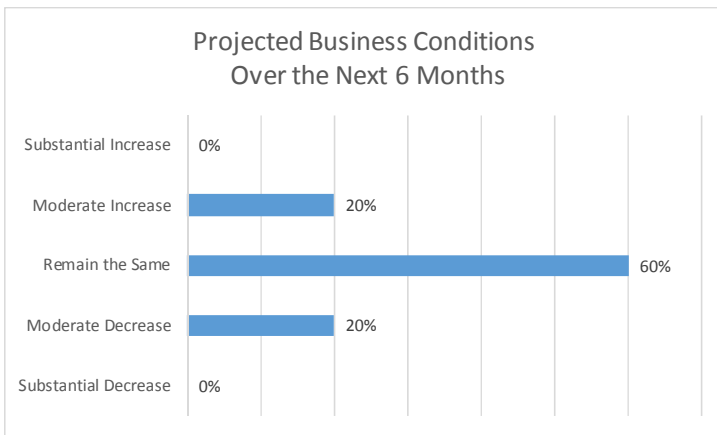
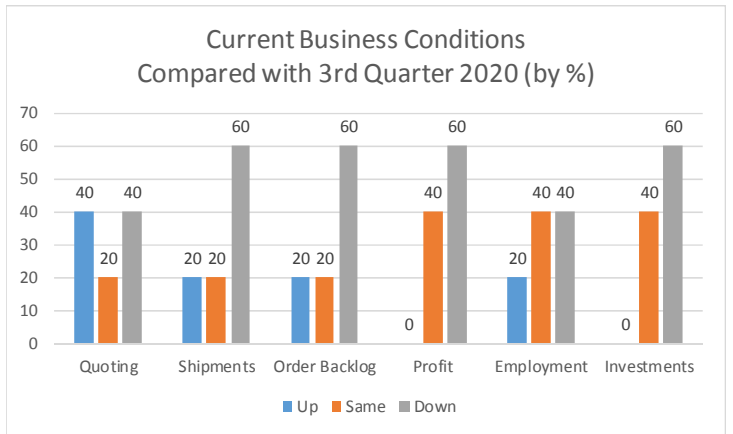
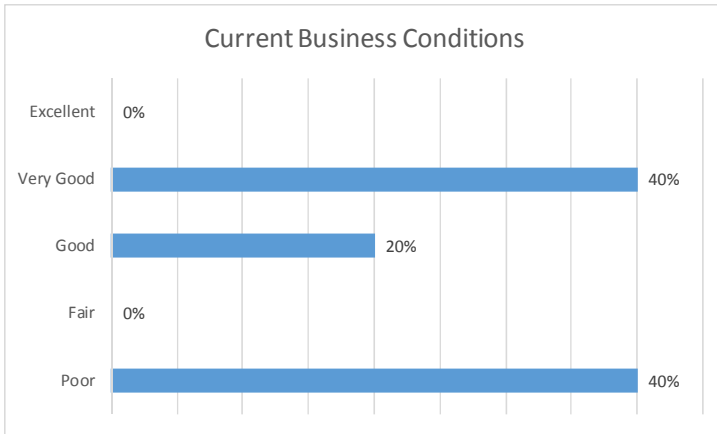
### Tools, Die & Fixtures (13 responses)



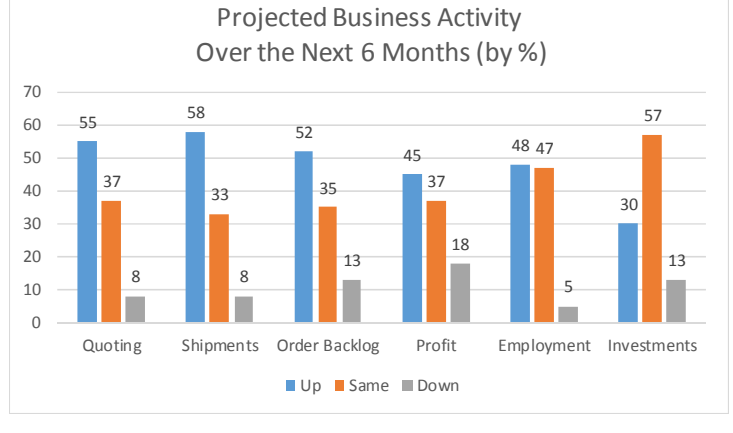
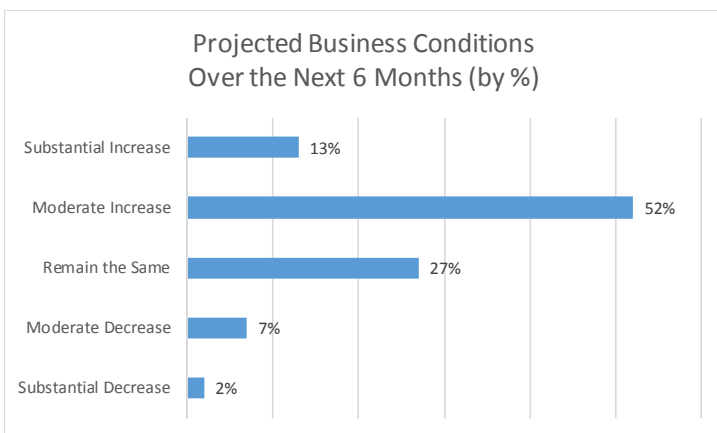
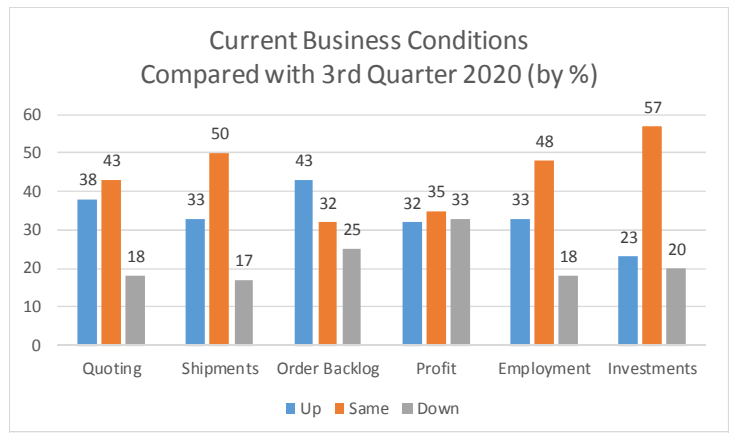
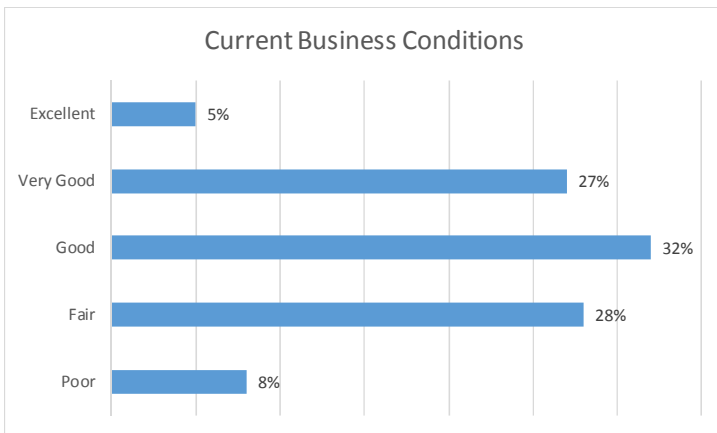
## Molds (11 responses)



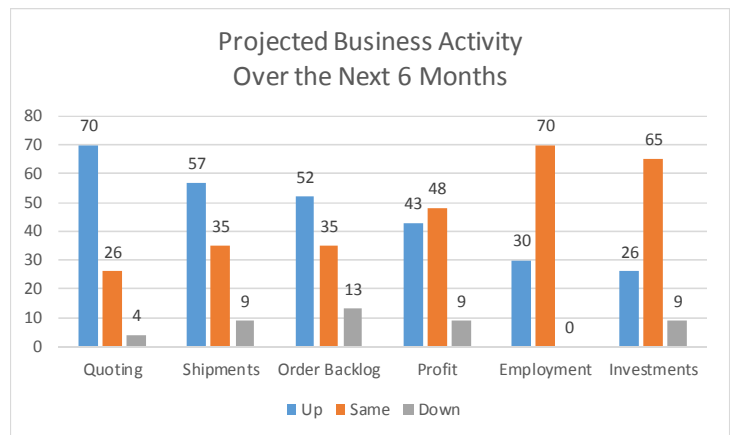
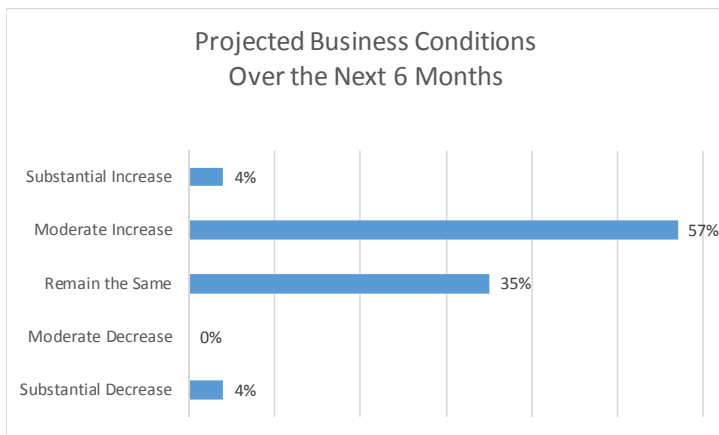
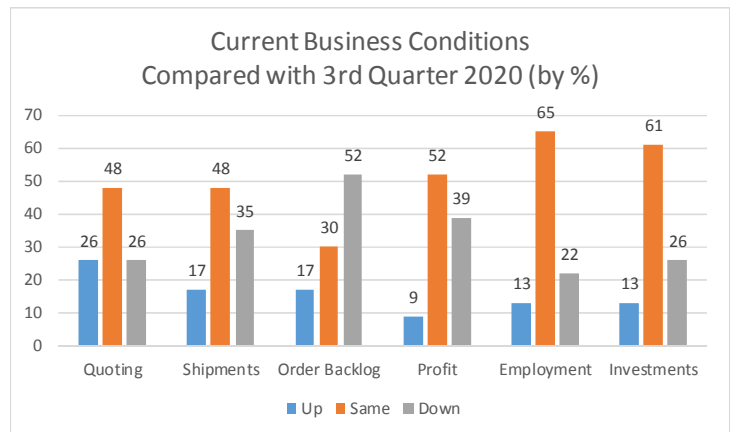
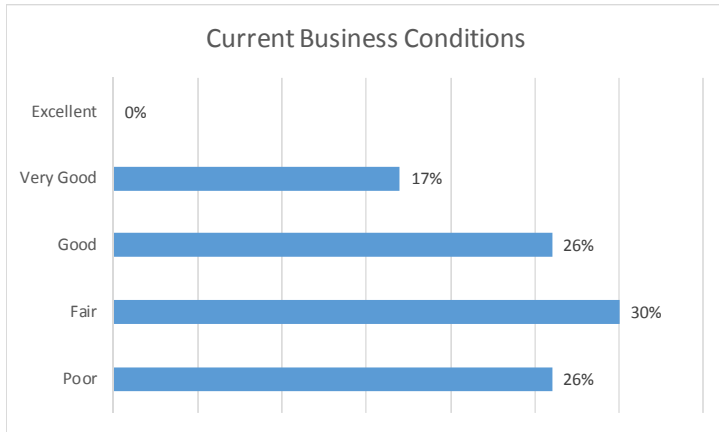
## Special Machines (5 response)



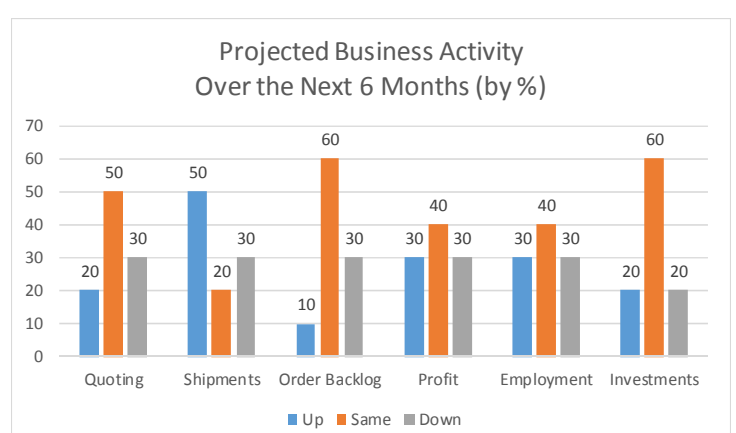
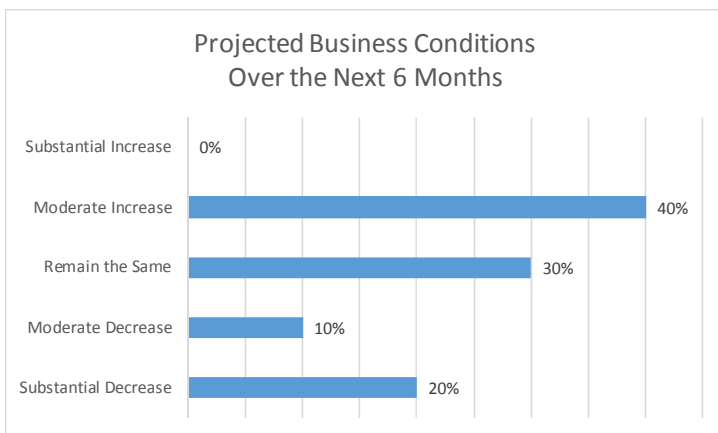
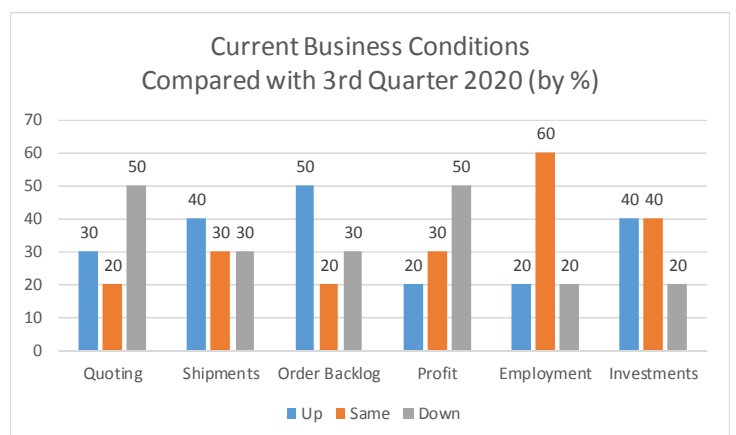
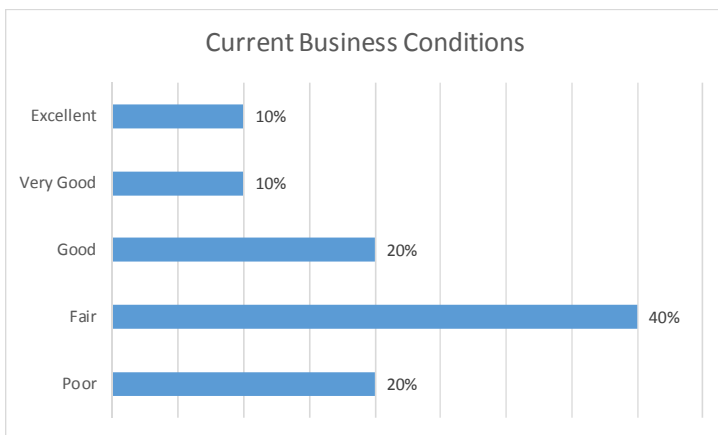
## Precision Machining excluding Aerospace (60 responses)



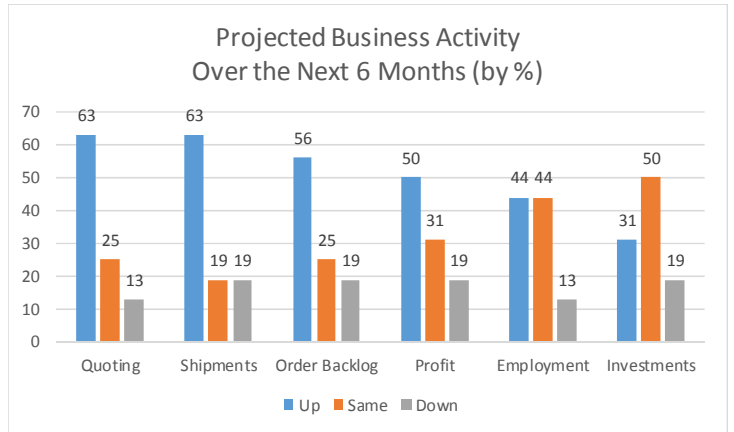
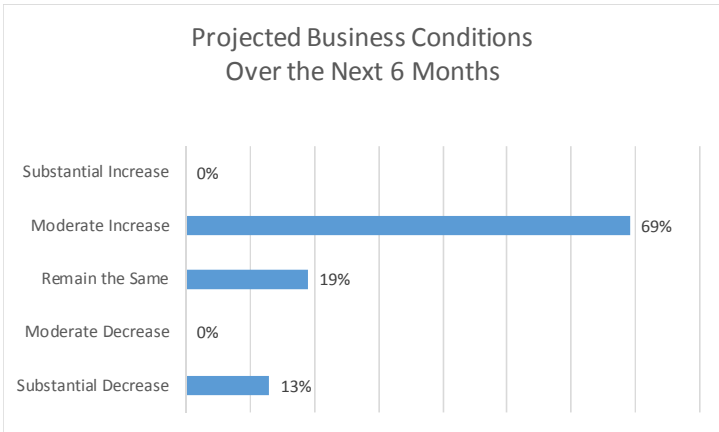
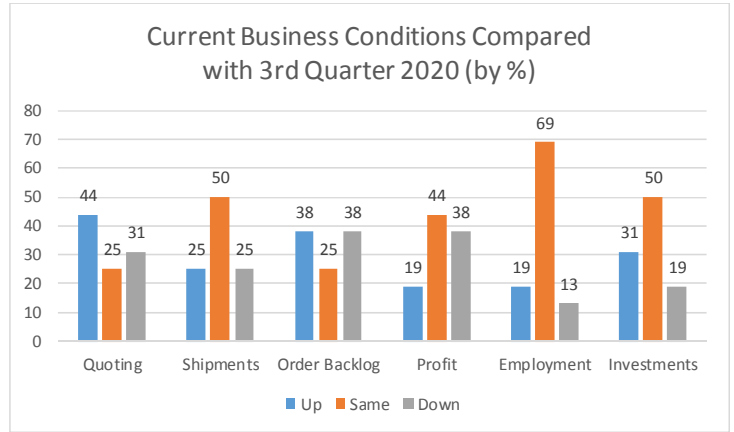
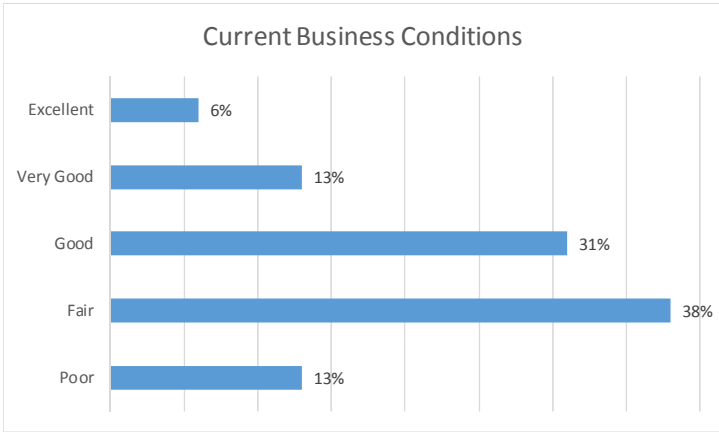
## Aerospace Machining & Fabrication (23 responses)



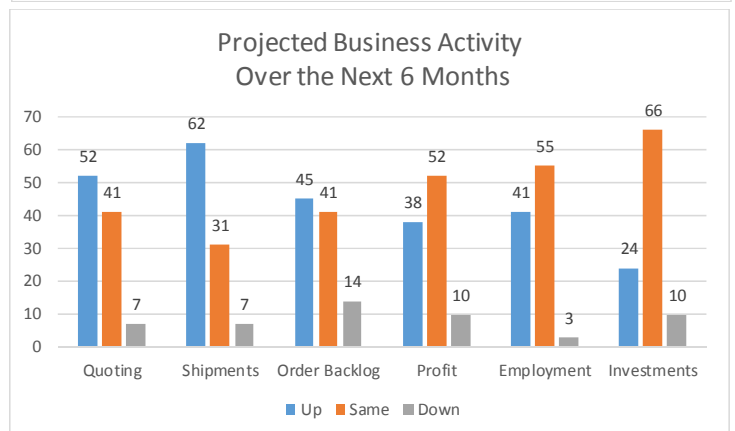
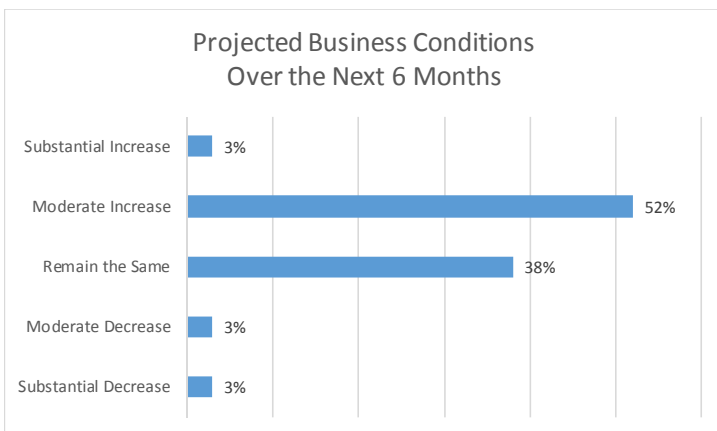
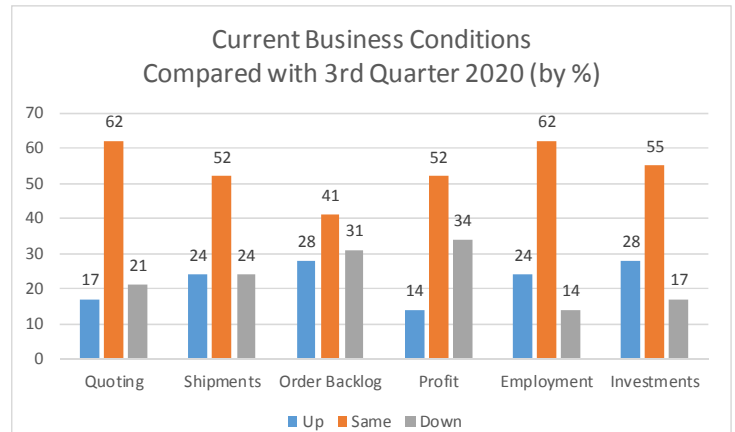
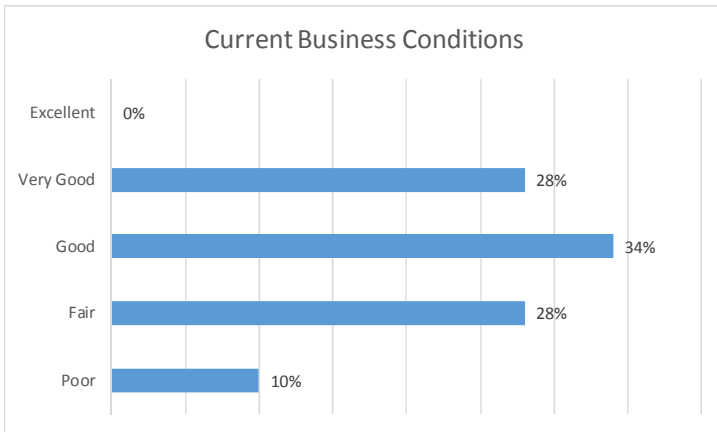
## Metal Fabrication & Stamping (10 response)



## BUSINESS CONDITIONS by Geographic Region NEW ENGLAND (ME, VT, RI, NH, MA, CT) – 16 responses

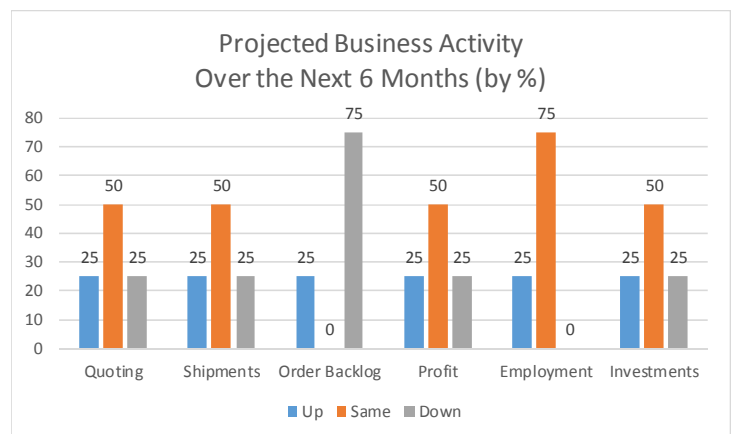
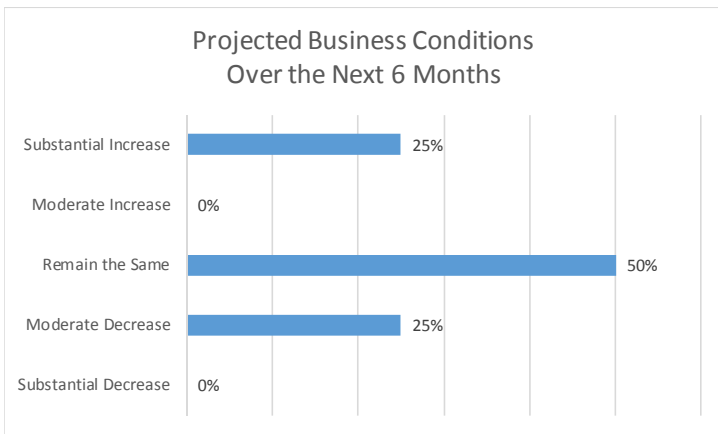
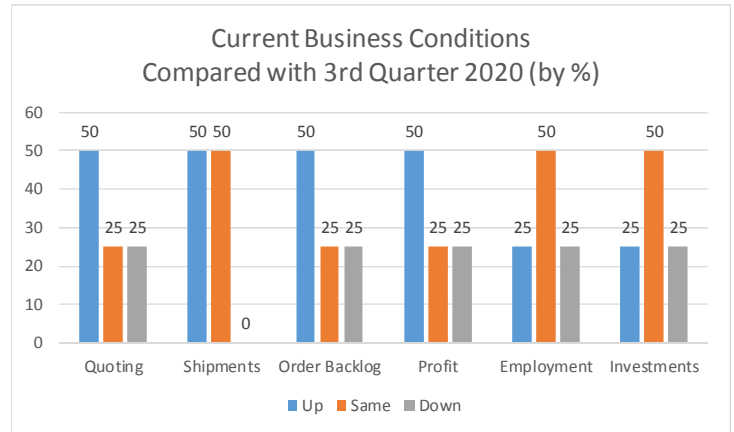
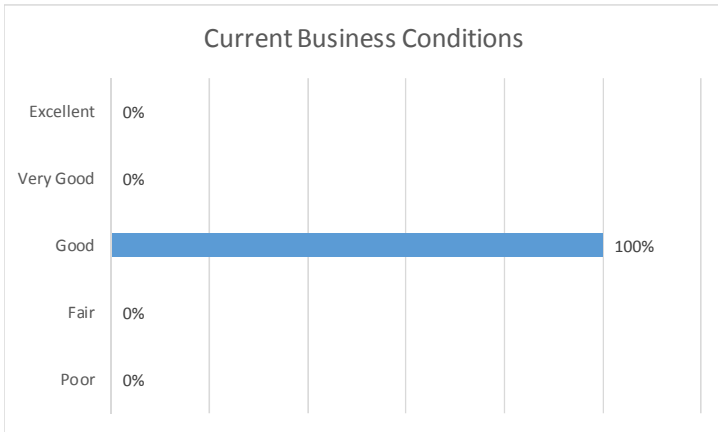


## NORTHEASTERN CENTRAL (DC, NY, PA, NJ, DE, MD, WV, VA) – 29 responses

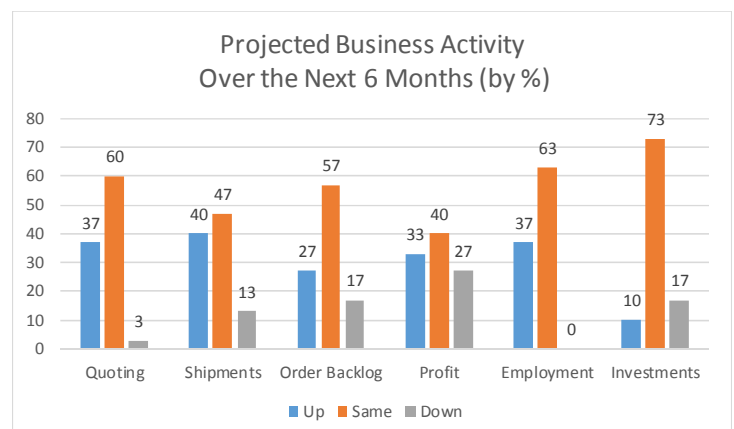
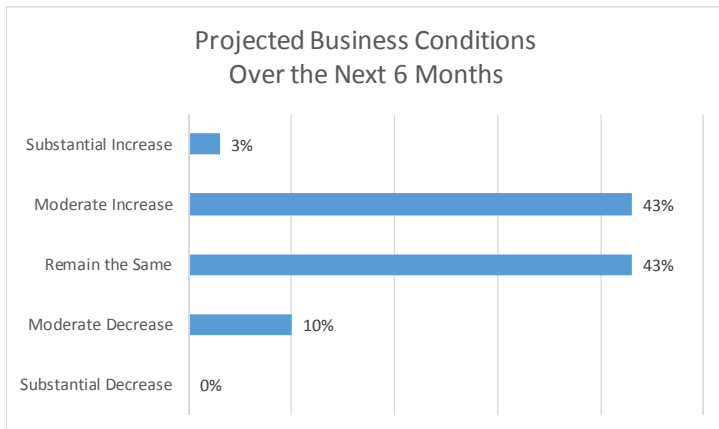
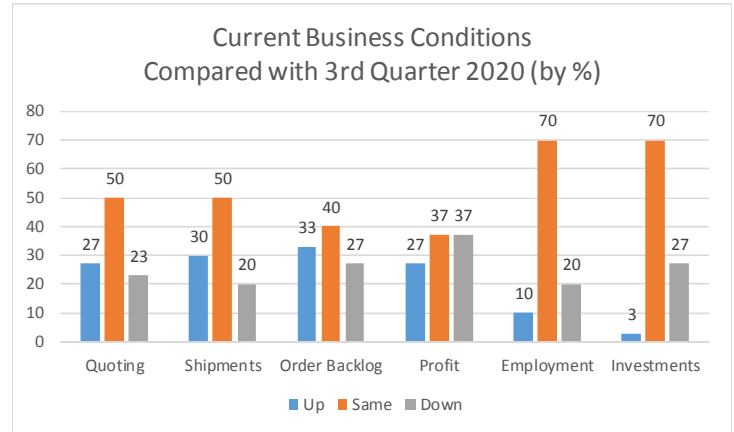
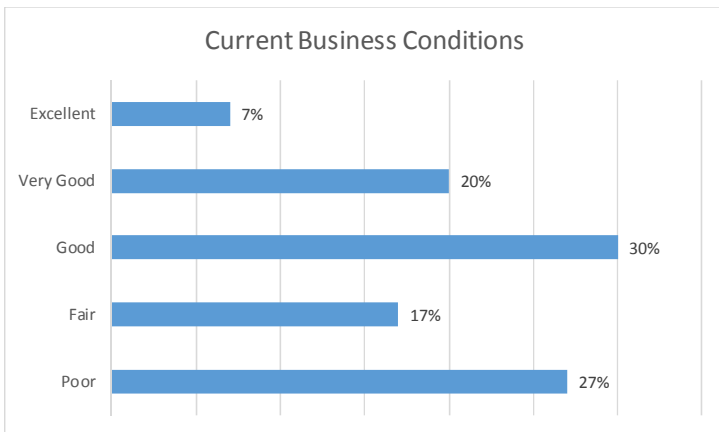




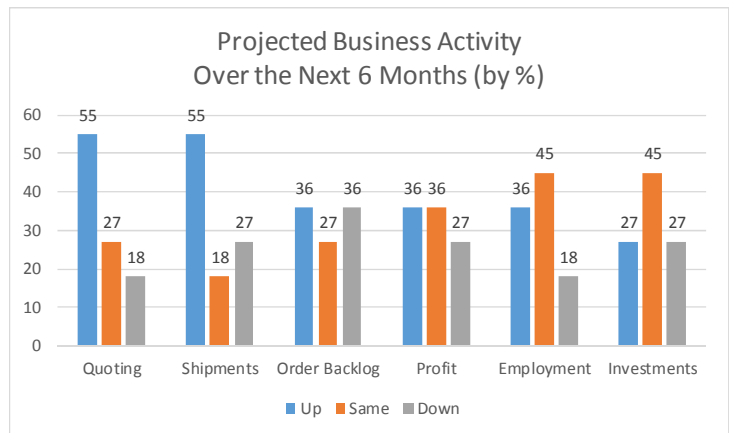
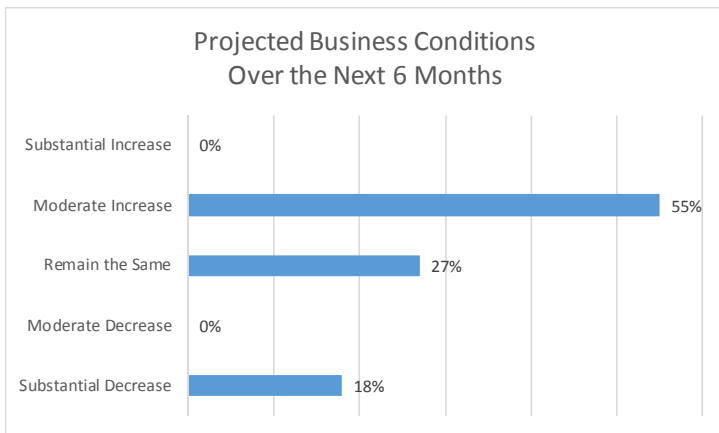
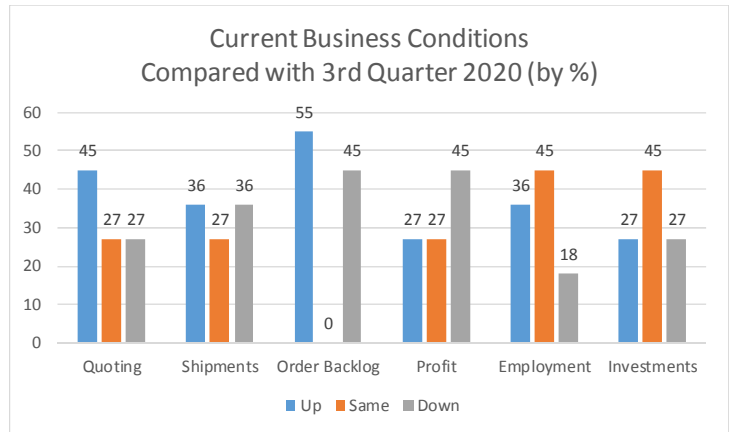
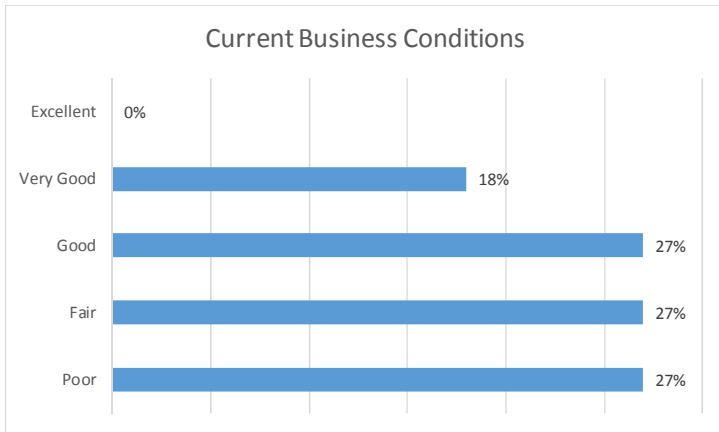
## SOUTHEASTERN (FL, KY, NC, SC, TN, GA, AL MS) – 4 responses



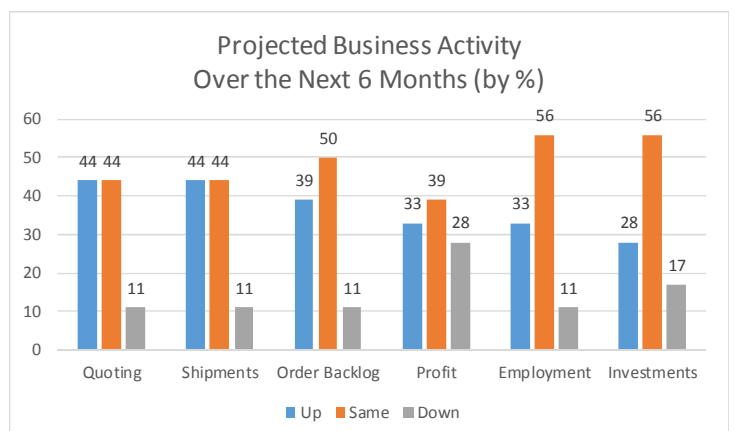
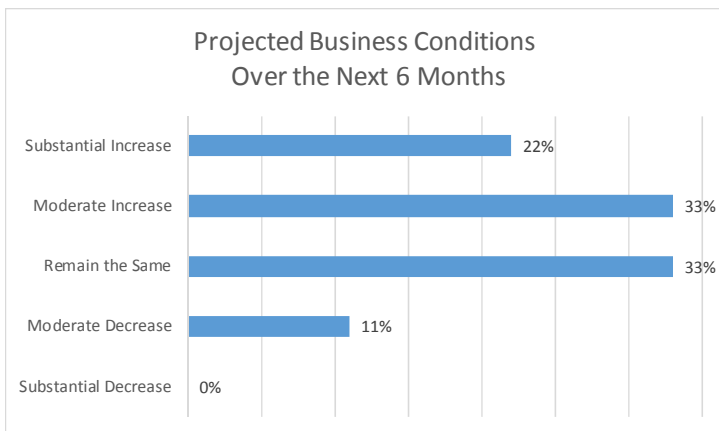
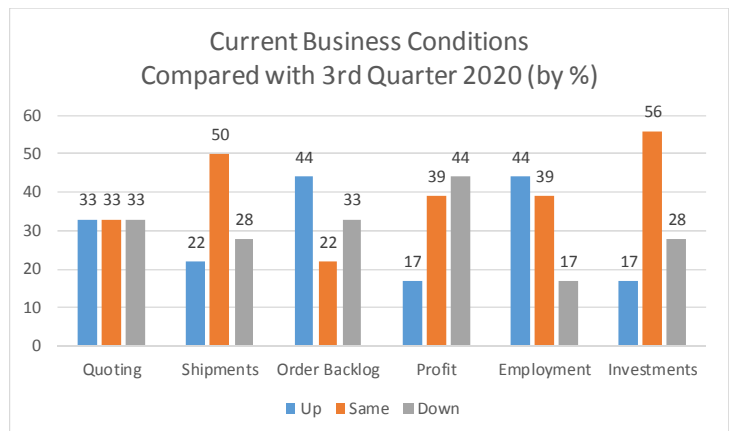
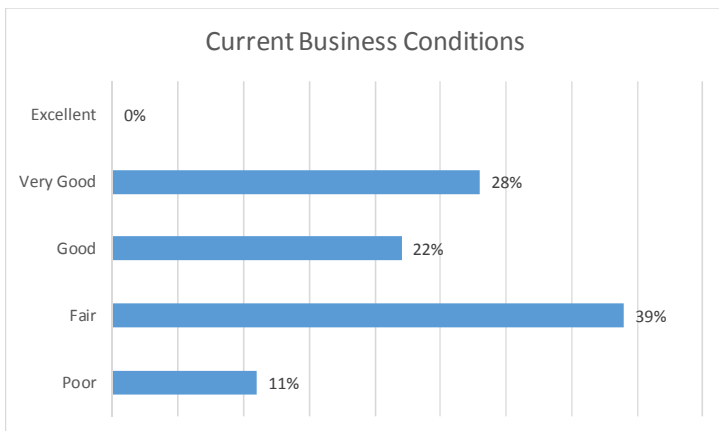
## NORTH CENTRAL (OH, MI, IL, IN, WI) – 30 responses



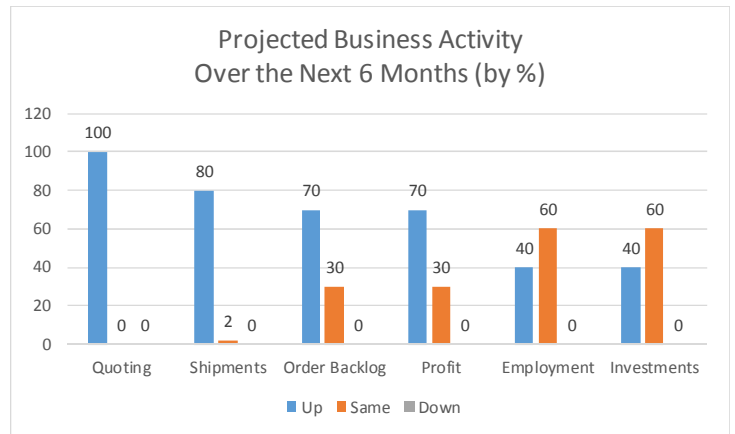
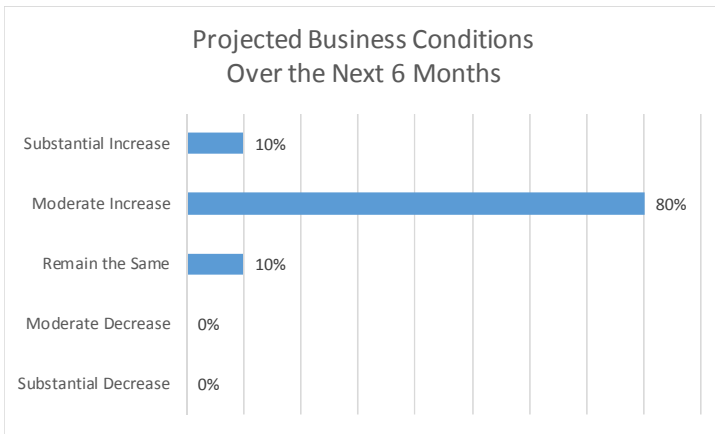
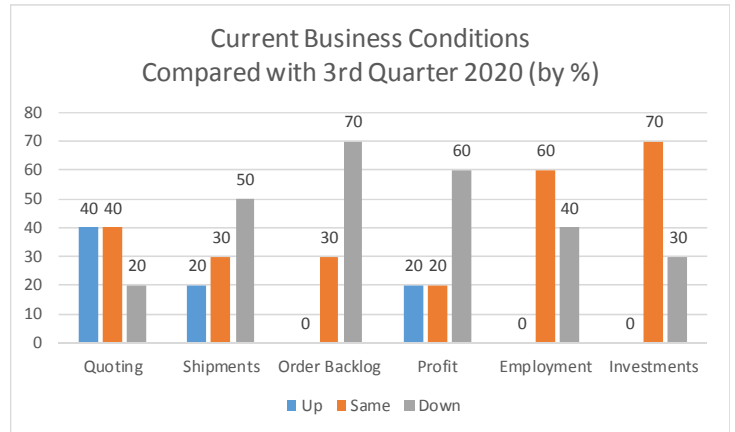
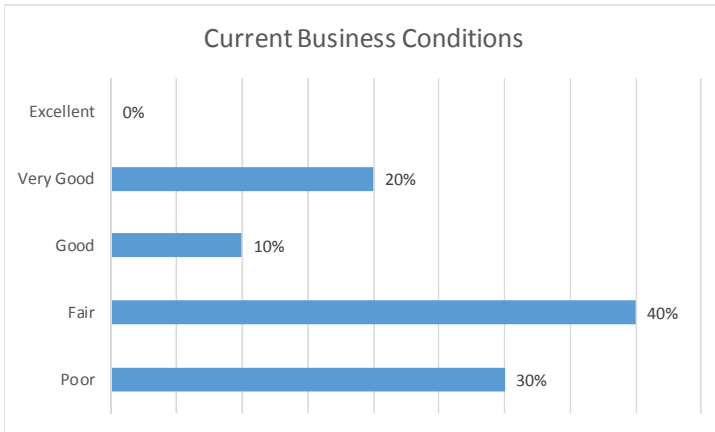
## CENTRAL (IA, MO NE, KS, MN) – 11 responses



## CENTRAL SOUTHWEST (AR, LA, OK, TX, NM, CO) – 18 responses



## GREATER PACIFIC SOUTHWEST (CA, NV, AZ, UT) – 10 responses



## GREATER NORTHWEST (ND, SD, MT, WY, ID, WA, OR) – 4 response

