

STATISTICS

(2004/5)

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Introduction

More than 500 companies, from 14 different countries, contributed world wide for the 2004 ISTMA survey. Overall the pattern of countries contributing is similar to that of the previous year.

Comparing 2003 national contributions to the ISTMA statistics report shows that all the national association that have contributed in 2003, they have also contributed to the 2004 data collection, except Spain. Czech Republic contributed this year for all the four sections of ISTMA statistics, and France made a limited contribution (only for part of the production and trade data). Both these countries had not contributed to the 2003 data.

Hungary, Spain and Sweden have not contributed for the 2004 survey in Europe. From Asia, no data from Australia, China, China Taipei, India, Philippines and Singapore has been received.

The following table shows the number of companies per country answering the survey in 2004 and 2003, and also the sections for which each national association has contributed in the 2004 survey. The number of companies this year reported from Japan is based on the total number of companies in the country, not on the companies contributing to the survey. This makes a direct comparison of the total number of companies difficult.

| | | 2003 | 2004 | 2004 | 2004 | 2004 | 2004 |
|---------------------|------|------|------|------|------|------|------|
| | | | | A1 | A2 | B | C |
| Canada | Am | 128 | 120 | ➤ | ➤ | ➤ | ➤ |
| USA | Am | 438 | 207 | P | ➤ | ➤ | ➤ |
| | 2 | 566 | 327 | | | | |
| Japan | Asia | 143 | 759 | P | P | P | ➤ |
| Korea | Asia | 26 | 22 | ➤ | ➤ | ➤ | N |
| Malasya | Asia | 6 | 12 | ➤ | ➤ | ➤ | P |
| | 3 | 175 | 793 | | | | |
| Czech Republic | Eur | 0 | 7 | ➤ | ➤ | ➤ | ➤ |
| Estonia | Eur | 7 | 7 | ➤ | ➤ | ➤ | ➤ |
| Finland | Eur | 9 | 19 | P | ➤ | ➤ | P |
| France | Eur | ? | 0 | N | ➤ | N | N |
| Germany | Eur | 34 | 26 | ➤ | ➤ | ➤ | ➤ |
| Great Britain | Eur | 7 | 5 | ➤ | ➤ | ➤ | ➤ |
| Italy | Eur | 20 | 14 | P | ➤ | ➤ | P |
| Portugal | Eur | 32 | 25 | P | ➤ | ➤ | ➤ |
| Slovenia | Eur | 15 | 15 | ➤ | ➤ | ➤ | ➤ |
| Spain | Eur | 10 | 0 | N | N | N | N |
| Switzerland | Eur | 5 | 2 | ➤ | ➤ | ➤ | ➤ |
| | 9 | 139 | 120 | | | | |
| Total | 14 | 880 | 1240 | | | | |
| Total without Japan | | 737 | 481 | | | | |

P= partial contribution; N= no contribution

A1= companies structure; A2= business figures and ratios
B= wages and salaries; C= production and trade



ISTMA statistics are a unique contribution to the knowledge of the tool, die and mould industries, also known as the precision industries or precision engineering industries. From 1988, ISTA and later ISTMA, have been collecting yearly data about the industry from each country, at a more granular and detailed level than the data usually available in the official national statistics. These statistics, collected at the company level in each country, have been an important source of benchmarking data for die and mould companies worldwide.

ISTMA is aware of the limitations of the available data and of associated problems. In some countries the number of companies contributing to the survey is small and very small. Some national associations report difficulties to have the contribution of their affiliated companies for the annual survey.

ISTMA Melbourne meeting (2005) has again discussed the issues of statistics and a plan to revise the presentation of the data was discussed and approved. This report is a transition in that evolution. A first effort has been made to present the data in a more systematic and easy to compare format.

Efforts to collect and to present the historical data available for each country in a compatible format are under way and a full report will be available during the next months.

All money values are in euros. A table with the conversion rates used is included.

Data is presented under three main groups:

A. Business figures and ratios relative to the 2004 year, collected by the companies survey, and organized under two sets of data:

- A1 (companies data structure) summarizes the data about the companies contributing to the survey per country. These data shows the profiles of the contributing companies per country:

- specialization of the companies (if more than 70% of the production, or otherwise mixed program companies – columns a1 to a6),
- captive shops (column b1),

- dimension of the companies (columns c1 to c4),
- purchasing profiles of the companies (columns d1 to d8)

- A2 (economical and financial ratios), collected by the companies survey, summarizes per country

- the turnover (sales), value added and operating income by employee and per hour (columns i1 to p1),
- several ratios relative to the annual turnover (sales) (columns q1 to q7)
- financial liquidity (column u1)

B. Wages and salaries, reference to May 2005, collected by the companies survey, per country, includes information about

- working hours per year (columns m1 and m2)
- structure of wages and salaries (column r2)
- minimum, maximum and average hourly salaries for skilled
 - mouldmaker (columns v1 to v3)
 - tool and die maker (columns x1 to x3)
 - designer (columns y1 to y3)
 - machine operator / programmer (columns w1 to w3)
 - machine loader (columns z1 to z3)
- minimum, maximum and average monthly salary for a foreman (columns aa1 to aa3)

C. Production and trade statistics, by country. These data was NOT collected from the



companies survey, but reported by the national associations based on the available data from the national statistics agencies and other sources. Total production, export and import flows (in value) are presented with their components by type of product.

Caution should be used when comparing data from different countries and numbers should be read as non precise estimates, due to the different number of companies answering the survey in different countries, their different profiles and also due to sampling errors and (in some countries) the very limited number of contributions. Anyway, with all the problems that can be present, these data is a unique asset of the industry and efforts should be made to maintain and to improve this main ISTMA asset and activity.

Limited contributions, or even systematic non-cooperation from some of the affiliated national associations, are also an issue that needs to be sorted out in the future. ISTMA is based on the mutual cooperation principles and an effort from all the affiliated associations is expected in order to contribute to the common goal of better and deeper information about the industry world wide.

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Currency conversion table:

| | | Euro | USD |
|----------------|-----|----------|----------|
| Canada | CAD | 0.965 | 1.151 |
| Czech Republic | CZK | 19.958 | 23.810 |
| Estonia | EEK | 15.750 | 13.200 |
| Finland | EUR | 1.000 | 1.193 |
| France | EUR | 1.000 | 1.193 |
| Germany | EUR | 1.000 | 1.193 |
| Great Britain | GBP | 0.482 | 0.575 |
| Italy | EUR | 1.000 | 1.193 |
| Japan | YEN | 140.449 | 167.561 |
| Korea | WON | 1148.280 | 1369.900 |
| Malasya | RM | 3.185 | 3.800 |
| Portugal | EUR | 1.000 | 1.193 |
| Slovenia | SIT | 240.000 | 286.330 |
| Switzerland | CHF | 1.096 | 1.307 |
| USA | USD | 0.838 | 1.000 |

Business figures: definitions and explanations

| | Item | Description |
|---|---|--|
| 1 | Turnover (sales) | Total values of sales (invoices given to customers) per year, but excluding sales taxes, value added taxes (VAT), sales returns, and sales from any other source or business not connected with the core business. Work-in progress should not be included. |
| 2 | Total operating income | Turnover (sales) according to definition for Item #1 plus increase (decrease) in finished goods and work in progress plus own production capitalized. |
| 3 | Other operating income | All other revenues not connected to core business |
| 4 | Other operating expenses | All other expenses not connected to core business |
| 5 | Value added | Total operating performance according to definition for item #2 plus other operating income according to definition for item #3 minus material expenses according to definition for item #10 and other operating expenses according to definition for item #4. |
| 6 | Total number of employees | All employees of the company, i.e., hourly (including apprentices), salaried, administrative, management, and owners active in the company. Part-time employees are to converted into full-time employees based on hours worked. |
| 7 | Total number of hours worked | Total number of actual hours worked per year for all employees of the company, i.e., hourly (including apprentices), salaried, administrative, management, and owners active in the company |
| 8 | Standard parts for tools purchased from outside | All standard parts for tools, i.e., mold bases, die sets, ejector pins, guide pillars, punches, springs, machined plates, bushings, shanks, etc., which are purchased from outside. |
| 9 | Subcontract work purchased from outside | Parts for tools (but not standard parts according to definition item #8) and product related technical services, i.e., heat and surface treatment, machining, and design |

| | Item | Description |
|----|--|---|
| | | services purchased from outside. |
| 10 | Material expenses purchased from outside | All expenses for raw materials plus standard parts for tools purchased from outside according to definition for item #8 plus subcontract work according to definition for Item #9 plus all other materials. |
| 11 | Personnel expenses | Total wages and salaries per year for all employees (according to definition for item #6) plus all social service payments and fringe benefits (required by law or voluntary) as well as owners remuneration. |
| 12 | Operating profit | Total operating performance according to definition for item #2 plus other operating income according to definition for item #3 minus material expenses according to definition for item #10, personnel expenses according to definition for item #11, and other operating expenses according to definition for item #4. (Value before interest, tax, depreciation/amortization, and extraordinary items). |
| 13 | EBITDA | Operating profit according to definition for item #12 plus extraordinary items. (Earnings before interest, tax, and depreciation / amortization). |
| 14 | Investment in machinery and equipment | All expenditures per year for machinery and equipment, including software and self-made machinery. Leasing expenditures should be included. |
| 15 | Liquidity | Short-term accounts receivable and available funds (quick assets) divided by short-term liabilities on the balance sheet at year end short-term = up to one year). Not included are other current assets such as inventory. |
| 16 | Standard working hours for full-time employees | Total number of standard working hours per year for full-time employees. (365 days minus weekends, entitled paid leave, and other festive days) multiplied by standard working hours per day. |
| 17 | Actual working hours for full-time employees | Working hours per year for full time employees including overtime and unused entitled paid leave, but not including hours for sickness, strikes, etc. |

A. Companies survey: business figures and ratios (2004)

A1: companies data structure

List of columns:

| | | |
|----|---------------------|-------------------------------------|
| a0 | number of companies | total |
| a1 | number of companies | primarily press tool manufacturers |
| a2 | number of companies | primarily mould companies |
| a3 | number of companies | primarily jigs and fixtures |
| a4 | number of companies | primarily body dies |
| a5 | number of companies | primarily precision engineering |
| b1 | number of companies | primarily mixed production programs |
| b2 | number of companies | primarily integrated captive shops |
| c1 | number of companies | less than 50 people |
| c2 | number of companies | 50 to 99 people |
| c3 | number of companies | 100 to 299 people |
| c4 | number of companies | more than 300 people |
| d1 | number of companies | purchasing complete tools |
| d2 | number of companies | purchasing parts of tools |
| d3 | number of companies | purchasing other products |
| d4 | number of companies | purchasing grinding work |
| d5 | number of companies | purchasing milling work |
| d6 | number of companies | purchasing edm work |
| d7 | number of companies | purchasing design work |
| d8 | number of companies | purchasing other works |

A1. ISTMA 2004 Companies Surveys - Basic Data

*1 - included in press tools
163 = a+b

| | | | number of companies | | | | | | | | | | | | number of companies | | | | | | | |
|------|----------------|------|---------------------|--------------------------|-----------------|-------------------|-----------|-----------------------|---------------------------|--------------------------|---------------------|-----------------|--------------------|----------------------|---------------------|----------------|----------------|---------------|--------------|----------|-------------|-------------|
| | | | total | press tool manufacturers | mould companies | jigs and fixtures | body dies | precision engineering | mixed production programs | integrated captive shops | less than 50 people | 50 to 99 people | 1000 to 299 people | more than 300 people | complete tools | parts of tools | other products | grinding work | milling work | edm work | design work | other works |
| | | | a0 | a1 | a2 | a3 | a4 | a5 | a6 | b1 | c1 | c2 | c3 | c4 | d1 | d2 | d3 | d4 | d5 | d6 | d7 | d8 |
| 2004 | Canada | Am | 110 | 33 | 55 | 5 | *1 | 17 | 20 | 20 | 65 | 20 | 27 | 8 | 44 | 69 | 13 | | 60 | 60 | 48 | 32 |
| 2004 | USA | Am | 207 | 34 | 19 | 34 | 34 | 85 | 24 | 0 | n.a | n.a | n.a | n.a | n.a | n.a | n.a | n.a | n.a | n.a | n.a | n.a |
| 2004 | Japan | Asia | 759 | 107 | 241 | 163 ^a | b | 248 | 759 | 511 | 372 | 68 | 48 | 23 | n.a | n.a | n.a | n.a | n.a | n.a | n.a | n.a |
| 2004 | Korea | Asia | 22 | 7 | 13 | 0 | 0 | 0 | 2 | | 17 | 2 | 2 | 1 | 11 | 15 | | | 17 | 13 | 12 | |
| 2004 | Malasya | Asia | 12 | 2 | 5 | 1 | 1 | 1 | 2 | 2 | 6 | 2 | 4 | | 0 | 12 | 12 | | 12 | 10 | 3 | 12 |
| 2004 | Czech Republic | Eur | 7 | 1 | 5 | | | | 1 | | | 1 | 6 | | | 3 | | | 4 | 1 | 2 | 2 |
| 2004 | Estonia | Eur | 7 | 1 | 2 | 0 | 0 | 0 | 4 | 0 | 3 | 3 | 1 | 0 | 1 | 3 | 0 | | 1 | | 3 | 5 |
| 2004 | Finland | Eur | 19 | 2 | 10 | 1 | 1 | 2 | 3 | 11 | 12 | 6 | 1 | 0 | 1 | 5 | | | | | | |
| 2004 | France | Eur | | | | | | | | | | | | | | | | | | | | |
| 2004 | Germany | Eur | 26 | 7 | 4 | 4 | 2 | 2 | 9 | 6 | 2 | 8 | 12 | 4 | 0 | 18 | 6 | | 20 | 10 | 18 | 14 |
| 2004 | Great Britain | Eur | 5 | 1 | 4 | 0 | 0 | 0 | 1 | 1 | 3 | 2 | 0 | 0 | 0 | 5 | 5 | | 0 | 0 | 1 | 2 |
| 2004 | Italy | Eur | 14 | 2 | 9 | | | | 3 | | 11 | 1 | 2 | | | | | | | | | |
| 2004 | Portugal | Eur | 25 | | 24 | | 1 | | | | 12 | 3 | 4 | | | | | | | | | |
| 2004 | Slovenia | Eur | 15 | 5 | 7 | 0 | 0 | 1 | 2 | 4 | 6 | 3 | 6 | 0 | 14 | 1 | 0 | | 14 | 13 | 15 | 1 |
| 2004 | Switzerland | Eur | 2 | 1 | 1 | | | | | | | | 2 | | | 2 | | | 2 | | 2 | 2 |
| | Am | | 317 | 67 | 74 | 39 | 34 | 102 | 44 | 20 | 65 | 20 | 27 | 8 | 44 | 69 | 13 | 0 | 60 | 60 | 48 | 32 |
| | Asia | | 793 | 114 | 254 | 0 | 0 | 248 | 761 | 511 | 389 | 70 | 50 | 24 | 11 | 15 | 0 | 0 | 17 | 13 | 12 | 0 |
| | Asia w/Japan | | 34 | 9 | 18 | 1 | 1 | 1 | 4 | 2 | 23 | 4 | 6 | 1 | 11 | 27 | 12 | 0 | 29 | 23 | 15 | 12 |
| | Eur | | 120 | 20 | 66 | 5 | 4 | 5 | 23 | 22 | 49 | 27 | 34 | 4 | 16 | 32 | 6 | 0 | 41 | 24 | 41 | 26 |

A2: business figures and ratios

List of columns:

| | | |
|----|-----------------------|--|
| a0 | number of companies | total |
| i1 | euros | turnover per employee |
| j1 | euros | value added per employee |
| k1 | percentage | value added as % turnover (sales) |
| l1 | euros | total operating income per employee |
| | | |
| n1 | euros per hour | turnover per hour |
| o1 | euros per hour | value added per hour |
| p1 | euros per hour | total operating income per hour |
| | | |
| q1 | as % turnover (sales) | std parts for tools purchased from outside |
| q2 | as % turnover (sales) | subcontract work |
| q3 | as % turnover (sales) | material expenses |
| q4 | as % turnover (sales) | total personnel costs |
| q5 | as % turnover (sales) | operating profit |
| q6 | as % turnover (sales) | EBITDA |
| q7 | as % turnover (sales) | investment in machinery |
| u1 | as % turnover (sales) | liquidity |

A2. ISTMA 2004 Companies Survey - Economical and financial ratios

| | | | number of companies | | | | | | | | | | | | | | | |
|------|----------------|------|---------------------|-----------------------|--------------------------|-----------------------------------|-------------------------------------|-------------------|----------------------|---------------------------------|---------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-------------------------|-----------------------|
| | | | | total | euros | euros | percentage | euros | euros per hour | euros per hour | euros per hour | as % turnover (sales) | as % turnover (sales) | as % turnover (sales) | as % turnover (sales) | as % turnover (sales) | as % turnover (sales) | as % turnover (sales) |
| | | | | turnover per employee | value added per employee | value added as % turnover (sales) | total operating income per employee | turnover per hour | value added per hour | total operating income per hour | std parts for tools | subcontracting | material expenses | total personnel cost | operating profit | EBITDA | investment in machinery | liquidity |
| | | | a0 | i1 | j1 | k1 | l1 | n1 | o1 | p1 | q1 | q2 | q3 | q4 | q5 | q6 | q7 | u1 |
| 2004 | Canada | Am | 110 | 106 | 84 | 79% | n.a | 55 | 43 | n.a | n.a | 10% | 18% | 37% | 12% | n.a | 0% | 1,0 |
| 2004 | USA | Am | 207 | 109 | 66 | 60% | 118 | 55 | 32 | 59 | 4% | 7% | 32% | 48% | 9% | 9% | n.a | 1,8 |
| 2004 | Japan | Asia | 759 | 170 | 57 | 33% | 37 | 72 | 24 | | | | | | | | | |
| 2004 | Korea | Asia | 22 | 120 | 65 | 54% | 125 | 36 | 20 | 37 | 8% | 25% | 43% | 24% | 21% | 14% | 3% | 0,8 |
| 2004 | Malasya | Asia | 12 | 22 | 14 | 62% | 24 | 7 | 4 | 8 | | 2% | 28% | 5% | 18% | 23% | | 1,6 |
| 2004 | Czech Republic | Eur | 7 | 36 | 15 | 43% | 34 | 19 | 8 | 18 | 8% | 12% | 24% | 31% | | 12% | 0% | 1,1 |
| 2004 | Estonia | Eur | 7 | 25 | 11 | 45% | 26 | 14 | 6 | 14 | 12% | 2% | 40% | 39% | 13% | 13% | 5% | 1,7 |
| 2004 | Finland | Eur | 19 | 78 | 50 | 64% | 78 | 42 | 25 | 40 | 9% | 7% | 11% | 62% | 3% | 2% | 5% | 1,0 |
| 2004 | France | Eur | | | | | | | | | | | | | | | | |
| 2004 | Germany | Eur | 26 | 113 | 69 | 61% | 109 | 74 | 46 | 71 | 8% | 12% | 31% | 42% | 9% | 9% | 5% | 1,2 |
| 2004 | Great Britain | Eur | 5 | 84 | 60 | 72% | 85 | 45 | 33 | 46 | 7% | 3% | 29% | 55% | | 9% | 8% | 1,5 |
| 2004 | Italy | Eur | 14 | n.a | n.a | | 110 | n.a | n.a | n.a | 4% | 10% | 21% | 43% | n.a | n.a | 11% | 1,0 |
| 2004 | Portugal | Eur | 25 | 62 | 29 | 46% | 62 | 33 | 14 | 33 | 4% | 15% | 35% | 40% | 12% | 14% | 5% | 0,9 |
| 2004 | Slovenia | Eur | 15 | 56 | 32 | 57% | 66 | 33 | 18 | 38 | 6% | 7% | 18% | 42% | 7% | 10% | 9% | 1,5 |
| 2004 | Switzerland | Eur | 2 | 147 | 73 | 50% | 152 | 57 | 29 | 59 | 14% | 27% | 41% | 40% | 10% | 10% | 5% | 1,3 |
| | | | Am | 317 | | | | | | | | | | | | | | |
| | | | Asia | 793 | | | | | | | | | | | | | | |
| | | | Asia w/Japan | 34 | | | | | | | | | | | | | | |
| | | | Eur | 120 | | | | | | | | | | | | | | |

B. Wages and salaries (May 2005)

List of counms:

| | | |
|-----|----------------------------------|--|
| a0 | number of companies | total |
| m1 | hours | normal working hour per year |
| m2 | hours | actual working hours per year |
| r2 | percentage | benefits as % of wages and salaries |
| v1 | wages per hour (euros / hour) | skilled mouldmaker, minimum |
| v2 | wages per hour (euros / hour) | skilled mouldmaker, maximum |
| v3 | wages per hour (euros / hour) | skilled mouldmaker, average |
| x1 | wages per hour (euros / hour) | skilled tool and die maker, minimum |
| x2 | wages per hour (euros / hour) | skilled tool and die maker, maximum |
| x3 | wages per hour (euros / hour) | skilled tool and die maker, average |
| y1 | wages per hour (euros / hour) | skilled designer, minimum |
| y2 | wages per hour (euros / hour) | skilled designer, maximum |
| y3 | wages per hour (euros / hour) | skilled designer, average |
| w1 | wages per hour (euros / hour) | skilled operatot / programmer, minimum |
| w2 | wages per hour (euros / hour) | skilled operatot / programmer, maximum |
| w3 | wages per hour (euros / hour) | skilled operatot / programmer, average |
| z1 | wages per hour (euros / hour) | skilled machine loader, minimum |
| z2 | wages per hour (euros / hour) | skilled machine loader, maximum |
| z3 | wages per hour (euros / hour) | skilled machine loader, average |
| aa1 | salary per month (euros / month) | foreman, minimum |
| aa2 | salary per month (euros / month) | foreman, maximum |
| aa3 | salary per month (euros / month) | foreman, average |

C. Production and trade data (2004)

List of columns:

| | | |
|----|---------------------------------|---|
| | | turnover (sales), million euros |
| | | export, million euros |
| | | import, million euros |
| e1 | turnover (sales), million euros | tools for pressing, stamping or punching for metal work |
| e2 | turnover (sales), million euros | moulds for plastics and rubber |
| e3 | turnover (sales), million euros | moulds for metals |
| e4 | turnover (sales), million euros | jigs and fixtrures |
| e5 | turnover (sales), million euros | standard tooling components |
| e6 | turnover (sales), million euros | precision machined parts |
| f1 | export, million euros | tools for pressing, stamping or punching for metal work |
| f2 | export, million euros | moulds for plastics and rubber |
| f3 | export, million euros | moulds for metals |
| f4 | export, million euros | jigs and fixtrures |
| f5 | export, million euros | standard tooling components |
| f6 | export, million euros | precision machined parts |
| g1 | import, million euros | tools for pressing, stamping or punching for metal work |
| g2 | import, million euros | moulds for plastics and rubber |
| g3 | import, million euros | moulds for metals |
| g4 | import, million euros | jigs and fixtrures |
| g5 | import, million euros | standard tooling components |
| g6 | import, million euros | precision machined parts |



Exhibit:

Survey 2004, data collection form

Country: _____

Association: _____

National currency: _____

Number of companies DIRECTLY affiliated in the association: _____

Number of regional or sub sector associations affiliated in the association: _____

Number of companies affiliated in the the regional or sub sector associations: _____

National currency: _____

Please fill the yellow boxes with the appropriate values.

PART I

Number of companies contributing to this survey: _____,

thereof number of companies that are **PRIMARILY**:

| | |
|--|--|
| press tools manufacturers (press tools more than 70% of the turnover or sales) | |
| mould manufacturers (moulds more than 70% of the turnover or sales) | |
| manufacturers of jigs and fixtures (jigs and fixtures more than 70% of the turnover or sales) | |
| manufacturers of body dies (body dies more than 70% of the turnover or sales) | |
| precision machining companies (precision machining more than 70% of the turnover or sales) | |

and

| | |
|--|--|
| Number of companies with mixed production programs (press tools, moulds, body dies, ... together) (each less than 70%) | |
|--|--|

| | |
|--|--|
| Number of integrated (captive) shops in all the previous classes | |
|--|--|

Companies size:

| | |
|--|--|
| Number of companies with less than 50 employees | |
| Number of companies with 50 to 99 employees | |
| Number of companies with 100 to 299 employees | |
| Number of companies with more than 300 employees | |

Number of companies PRIMARILY purchasing these items from from outside suppliers:

| | |
|-----------------|--|
| Complete tools | |
| Parts of tools | |
| Others products | |

| | |
|--------------|--|
| EDM work | |
| Milling work | |
| Design work | |
| Other works | |

PART II

Benefits and Special Compensation, including

Paid Leave: vacations, holidays, sick leave, and other leave

Insurance: life, health, short and long term disability

Retirement and Savings: defined benefit and defined contribution plans

Legally Required Benefits: Social Security, unemployment insurance, and workers compensation

Other Benefits: severance pay, unemployment benefits, and all additional compensation not mentioned elsewhere.

| | |
|--|--|
| Total of benefits and special compensations as % of the paid wages and salaries | |
|--|--|

Wages (per HOUR in the national currency, excluding benefits and overtime)

| | | <i>Minimum</i> | <i>Maximum</i> | <i>Average</i> |
|---|---|----------------|----------------|----------------|
| 1 | Skilled mouldmaker w/at least 5 years experience | | | |
| 2 | Skilled tool & die Maker w/at least 5 years experience | | | |
| 3 | Skilled designer w/at least 5 years experience | | | |
| 4 | Skilled machine operator/programmer w/at least 5 years experience | | | |
| 5 | Skilled machine loader/unloader w/at least 5 years experience | | | |

Wages (per MONTH in the national currency, excluding benefits and overtime)

| | | <i>Minimum</i> | <i>Maximum</i> | <i>Average</i> |
|---|---------|----------------|----------------|----------------|
| 1 | Foreman | | | |

Yearly working time:

| | | hours |
|---|----|-------|
| Total number of standard working hours per full time employee (as reported by companies) | 16 | |
| Total number of actual working hours per full time employee (calculated from R1/R4) | 17 | |

See PART III next page

PART III

Business ratios

(A) If your association collected the business values (NOT ratios) for each company, please fill the next table and ISTMA secretariat will calculate the business ratios. Otherwise, go to (B), next page

For each variable please inform what is the TOTAL (accumulated) VALUE of all the collected responses,
in your national currency.

Column (*) indicate the definition of each top variable in the *ISTMA Business figures: definitions and explanations* document.

In the column # please indicate the number of companies / responses, IF DIFFERENT FROM THE TOTAL NUMBER OF COMPANIES CONTRIBUTING TO THE SURVEY (part I).

| | <i>Variable</i> | <i>(*)</i> | <i>Total value</i> | <i>#</i> |
|-----|---|------------|--------------------|----------|
| V1 | Turnover (sales, ex VAT) | 1 | | |
| V2 | Value added | 5 | | |
| V3 | Total operating income | 2 | | |
| V4 | EBITDA | 13 | | |
| V5 | Materials expenses | 10 | | |
| V6 | Standard parts for tools purchased from outside | 8 | | |
| V7 | Subcontract work | 9 | | |
| V8 | Investment in machinery and equipment | 14 | | |
| V9 | Personnel expenses | 11 | | |
| V10 | Total number employees | 6 | | |
| V11 | Total number of hours worked | 7 | | |
| | Liquidity | 15 | | |

(B) If your association collected the business RATIOS for each company, please fill the next table. Otherwise, go to A, previous page.

Each ratio R is the calculated dividing the value of the top variable to the value of the under variable.

The units of the variables are the national currency or hours, as applicable.

Columns (*) indicate the definition of each top and under variable in the *ISTMA Business figures: definitions and explanations* document.

| <i>R</i> | <i>Top variable</i> | <i>(*)</i> | <i>Under variable</i> | <i>(*)</i> | <i>ratio</i> |
|----------|---|------------|------------------------------|------------|--------------|
| R1 | Turnover (sales, ex VAT) | 1 | Total number employees | 6 | |
| R2 | Value added | 5 | Total number employees | 6 | |
| R3 | Total operating income | 2 | Total number employees | 6 | |
| R4 | Turnover (sales) | 1 | Total number of hours worked | 7 | |
| R5 | Value added | 5 | Total number of hours worked | 7 | |
| R6 | Total operating income | 2 | Total number of hours worked | 7 | |
| R7 | Standard parts for tools purchased from outside | 8 | Turnover (sales, ex VAT) | 1 | |
| R8 | Subcontract work | 9 | Turnover (sales, ex VAT) | 1 | |
| R9 | Materials expenses | 10 | Turnover (sales, ex VAT) | 1 | |
| R10 | Personnel expenses | 11 | Turnover (sales, ex VAT) | 1 | |
| R11 | Operating profit | 12 | Turnover (sales, ex VAT) | 1 | |
| R12 | EBITDA | 13 | Turnover (sales, ex VAT) | 1 | |
| R13 | Investment in machinery and equipment | 14 | Turnover (sales, ex VAT) | 1 | |

| | | | |
|--|-----------|----|--|
| | Liquidity | 15 | |
|--|-----------|----|--|

Thanks for your cooperation.

Please return the form to ISTMA secretariat before 31.January.2006