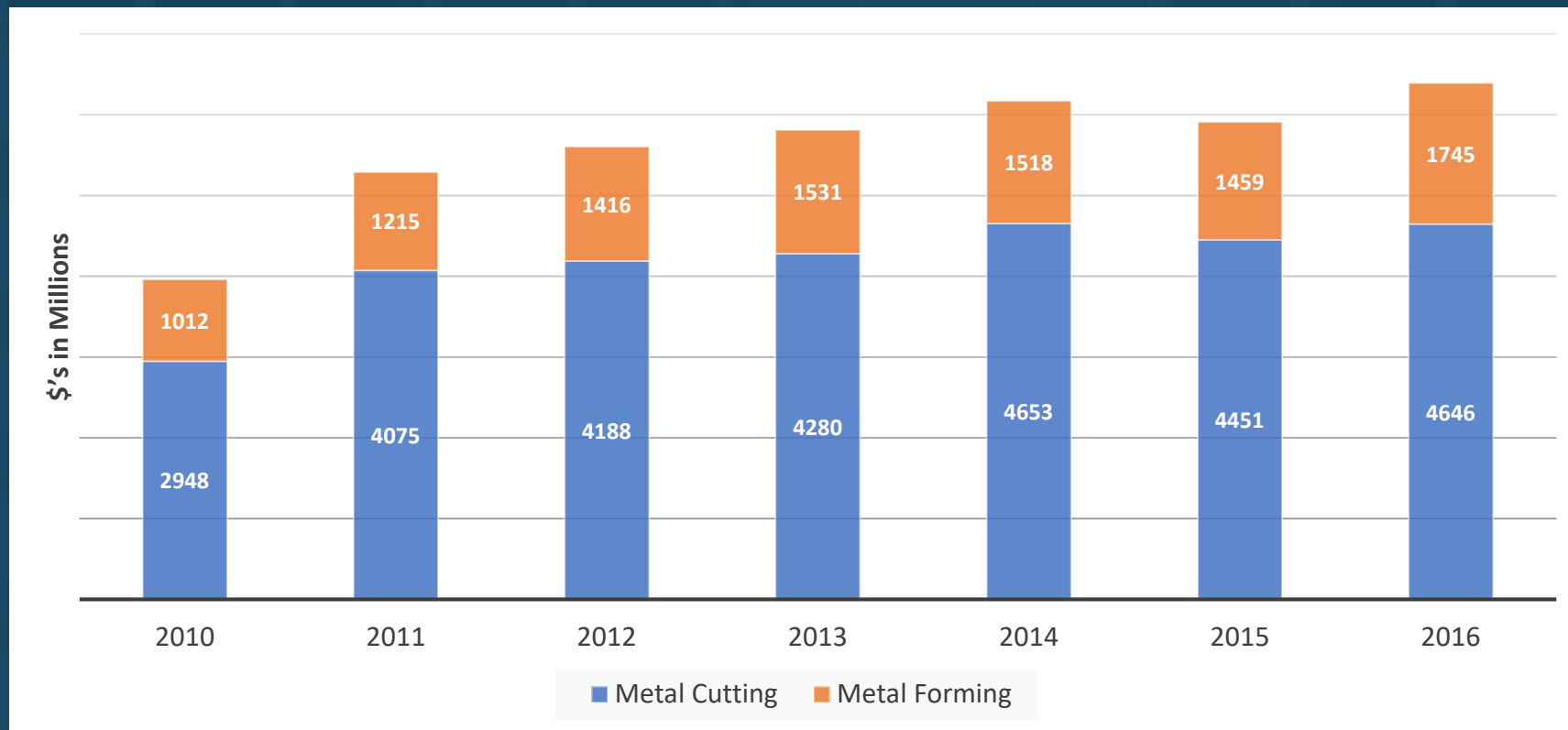


# 2018 Manufacturing Sectors: Learn What is Growing or Slowing

Patrick McGibbon  
Vice President – Strategic Analytics  
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IMTS  
EXHIBITOR  
WORKSHOP

# 2017 Production Data



Note: Excludes parts, used and rebuilt, and tools for home workshops

\*estimates based on 2015 Census data and USMTO 2016 data

Source: US Census – Annual Survey of Manufacturers

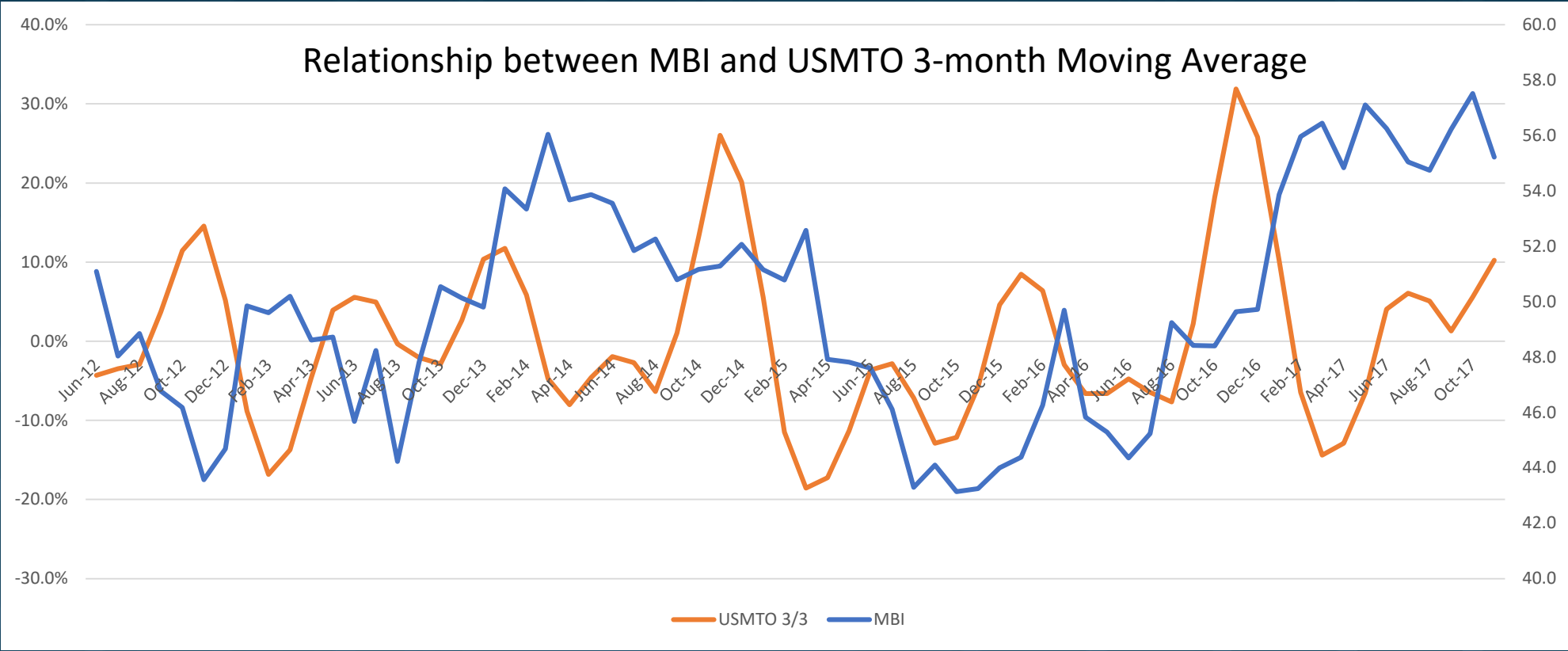
\$9 Billion

US: 2<sup>nd</sup> Largest Market in  
the World

# Top Indicators

Segment Business Conditions	Status
Manufacturing Technology Business Conditions	➔
Durable Goods Manufacturing Business Conditions	➔
Economic Indicators Summary	Status
Purchasing Managers Index	➔
Capacity Utilization for Mfg.	➔
Orders for Mfg. Durable Goods	➔
Housing Starts	➔
30 Yr. Mortgage Rate	➔
Consumer Sentiment	➔
MBI	➔
Light Vehicle Sales	➔
Baltic Dry Index	➔
Restaurant Performance Index	➔

# MBI



Source: Gardner Business Media and AMT – The Association For Manufacturing Technology

# Consumer Sentiment



Source: University of Michigan Consumer Sentiment

# Automotive

Industrial Production	Capacity Utilization	FDI (6 months)	Estimated % of Orders
131.5 ↑	82.9 ↑	\$3.8B+	20%



## Notable Projects

Toyota & Mazda - \$1.6B

Denso - \$1.0B

Hyundai Motor - \$270M

Bocar - \$115M

# Aerospace

Industrial Production	Capacity Utilization	FDI (6 months)	Estimated % of Orders
104.4 ↑	77.7 ↑	\$959.8M+	15%



## Notable Projects

GE- \$30M

Cesaroni Aerospace - \$29M

UTC- \$22M



# Medical, Science & Miscellaneous Hi-tech

Industrial Production	Capacity Utilization	FDI (6 months)	Estimated % of Orders
90.8 ↓	74.2 ↓	\$241.0M+	7%



## Notable Projects

Stryker - \$100M

Becton, Dickson and Company - \$60M

Arthrex - \$30M

# Off-Road/Ag/Construction

Industrial Production	Capacity Utilization	FDI (6 months)	Estimated % of Orders
72.0 	62.0 	\$851.4M+	6%



## Notable Projects

Komatsu - \$40.9M

Dhollandia - \$30M

Altec Inc. - \$8.5M

# Energy and Power Generation

Industrial Production	Capacity Utilization	FDI (6 months)	Estimated % of Orders
106.8 ↑	79.8 ↑	\$643.0M+	6%



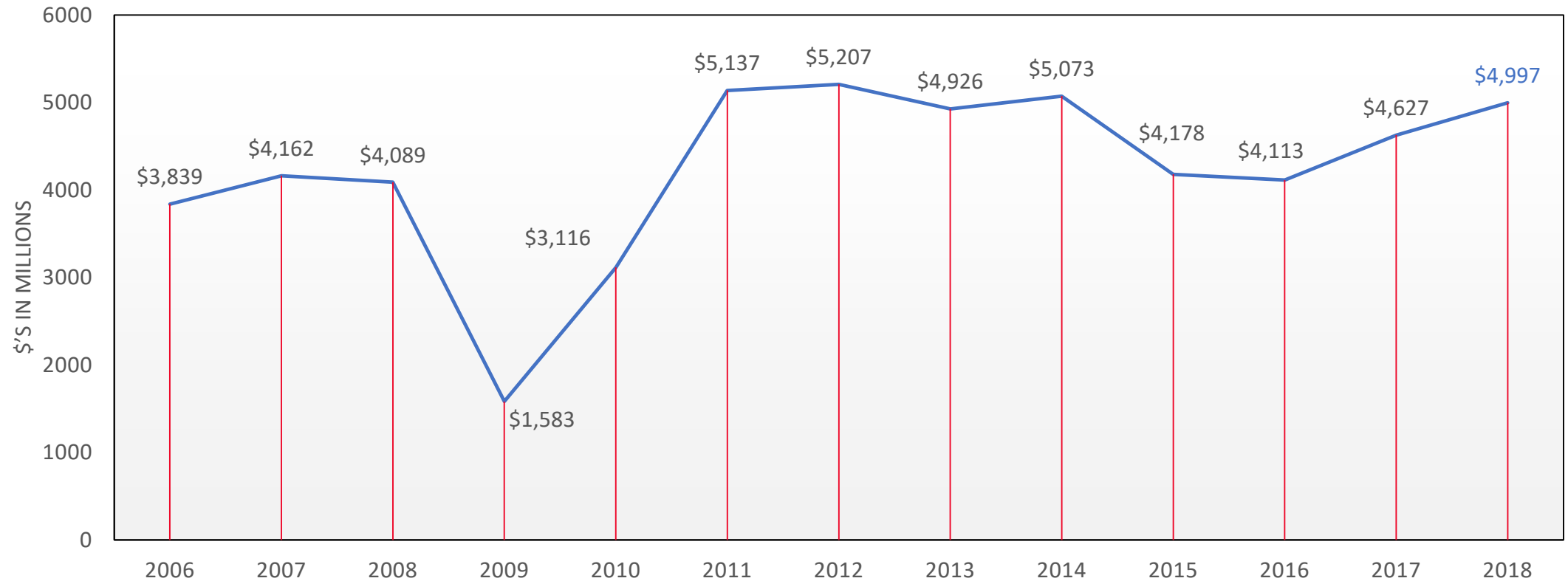
## Notable Projects

Briggs & Stratton - \$12.4M

# 2018 Tax Reform

- Rates
  - 35% → 21%
  - 40% → ~30%
- Expensing
  - 2022 FULL
- No Alternative Minimum Tax
- R&D
  - No Credit – Expense It

# U.S. Machine Tool Orders (USMTO)



Note: Number in blue are forecasts – weighted averages of GFMC-17 speakers  
Sources: USMTO by AMT, Gardner Business Media, Oxford Economics, HIS, ITR, ESL

# Questions?

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