



CUTTING TOOLS SURVEY 2007-2008 CUTTING TOOLS SURVEY

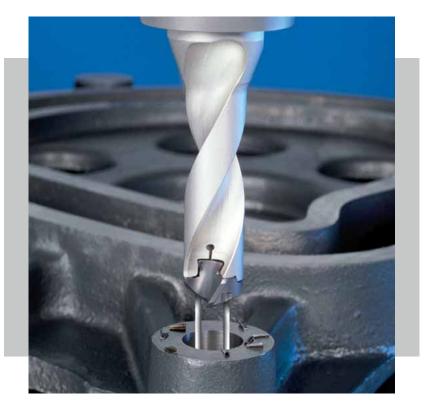
2500 Tamiami Trail North Nokomis, Florida 34275 941-966-9521 www.toolingandproduction.com

Nelson Publishing



CUTTING TOOLS SURVEY

SURVEY RESULTS



PURPOSE

The purpose of the 2007 Cutting Tools Survey was to determine brand awareness and which brands/types of cutting tools are being used among T&P subscribers. Also discovered, were important attributes for brand product attributes for brand purchase, current plans for purchase, present budgets, and expectations for future cutting tool budgets.

METHODOLOGY

Email invitations to participate in a Web survey were sent to subscribers of T&P magazine. Qualified subscribers included those who indicated on their subscription card that they perform milling and turning operations. 284 questionnaires were returned.

Some cutting tools photos courtesy of ISCAR.

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How familiar are you with the following cutting tool suppliers?

Kennametal	94%	
Sandvik	90%	
Iscar	79%	
Valenite	77%	
Ingersoll	65%	
Mitsubishi	61%	
Seco	57%	
Sumitomo	56%	
Komet	55%	
M.A. Ford	49%	
Manchester	42%	
Walter USA	39%	
Big Kaiser	37%	
Kyocera	36%	
SGS	34%	
Horn	33%	
Titex	33%	
Allied Machine	31%	
Dapra	29%	
ATI Stellram	26%	
YG1	22%	
Ceratizit	11%	
Prototyp	8%	

OTHER MENTIONS (10%):

SKOOOCIO IOOTIVE

A.B.Tools	Clapp Dico	Hanita	Niagara Cutting	SP3
Accupro	Data Flute	Kaiser	Tool	Spec Tool
Alliance	Exactaform	Thinbit	OSG	Timeco
Amamco	Fullerton Tool	K-Tools	Precision Twist	
CGS	Garr Tool	Mapal	Primary Cutter	
Circle	Greenleaf	Micro 100	Promax	
CJT	Guhring	Mil-Tec	Scientific Cutting	

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Please indicate which companies you currently purchase cutting tools from:

Sandvik64%Iscar58%Valenite44%Seco35%M.A. Ford32%Ingersoll30%Mitsubishi29%Komet27%Sumitomo27%Manchester21%SGS21%Horn20%	Kennametal	80%	
Iscar 58% Valenite 44% Seco 35% M.A. Ford 32% Ingersoll 30% Mitsubishi 29% Komet 27% Sumitomo 27% Manchester 21% Allied Machine 19% Titex 19% Big Kaiser 14% YG1 13% ATI Stellram 12% Walter USA 12% Dapra 5% Ceratizit 4%			
Valenite44%Seco35%M.A. Ford32%Ingersoll30%Ingersoll30%Mitsubishi29%Komet27%Sumitomo27%Manchester21%SGS21%Horn20%Allied Machine19%Titex19%Big Kaiser14%YG113%ATI Stellram12%Kyocera12%Walter USA12%Dapra5%Ceratizit4%			
Seco35%M.A. Ford32%Ingersoll30%Ingersoll30%Mitsubishi29%Komet27%Sumitomo27%Manchester21%SGS21%Horn20%Allied Machine19%Big Kaiser14%YG113%ATI Stellram12%Kyocera12%Mater USA12%Lapra5%Ceratizit4%			
M.A. Ford32%Ingersoll30%Mitsubishi29%Mitsubishi29%Komet27%Sumitomo27%Manchester21%SGS21%Horn20%Allied Machine19%Titex19%Big Kaiser14%YG113%ATI Stellram12%Kyocera12%Matter USA12%Ceratizit4%			
Ingersoll30%Mitsubishi29%Komet27%Sumitomo27%Manchester21%SGS21%Horn20%Allied Machine19%Titex19%Big Kaiser14%YG113%ATI Stellram12%Kyocera12%Dapra5%Ceratizit4%			
Mitsubishi 29% Komet 27% Sumitomo 27% Manchester 21% Manchester 21% Horn 20% Allied Machine 19% Titex 19% Big Kaiser 14% YG1 13% ATI Stellram 12% Kyocera 12% Walter USA 12% Dapra 5%			
Komet27%Sumitomo27%Manchester21%SGS21%Horn20%Allied Machine19%Titex19%Big Kaiser14%YG113%ATI Stellram12%Kyocera12%Dapra5%Ceratizit4%	-		
Manchester21%SGS21%Horn20%Horn20%Allied Machine19%Titex19%Big Kaiser14%YG113%ATI Stellram12%Kyocera12%Dapra5%Ceratizit4%	Komet	27%	
SGS21%Horn20%Allied Machine19%Titex19%Big Kaiser14%YG113%ATI Stellram12%Kyocera12%Dapra5%Ceratizit4%	Sumitomo	27%	
Horn20%Allied Machine19%Titex19%Big Kaiser14%YG113%ATI Stellram12%Kyocera12%Dapra5%Ceratizit4%	Manchester	21%	
Allied Machine19%Titex19%Big Kaiser14%YG113%ATI Stellram12%Kyocera12%Walter USA12%Dapra5%Ceratizit4%	SGS	21%	
Titex19%Big Kaiser14%YG113%ATI Stellram12%Kyocera12%Walter USA12%Dapra5%Ceratizit4%	Horn	20%	
Big Kaiser14%YG113%ATI Stellram12%Kyocera12%Walter USA12%Dapra5%Ceratizit4%	Allied Machine	19%	
YG1 13% ATI Stellram 12% Kyocera 12% Yalter USA 12% Dapra 5% Ceratizit 4%	Titex	19%	
ATI Stellram12%Kyocera12%Walter USA12%Dapra5%Ceratizit4%	Big Kaiser	14%	
Kyocera 12% Walter USA 12% Dapra 5% Ceratizit 4%	YG1	13%	
Walter USA 12% Dapra 5% Ceratizit 4%	ATI Stellram	12%	
Dapra 5% Ceratizit 4%	Kyocera	12%	
Ceratizit 4%	Walter USA	12%	
	Dapra	5%	
Prototyp 2%	Ceratizit	4%	
	Prototyp	2%	•

OTHER MENTIONS (17%):

A. B. Tools Accupro Alliance Amada Cutting Amamco CGS CJT Cleveland Data Flute Destiny

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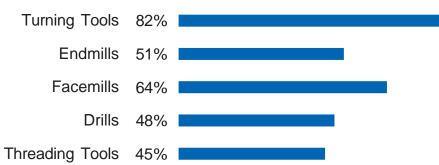
Dieugenio Tool Exactaform Fullerton Tool Garr Tool Giddings Greenfield Guhring Hanita Hertel Kaiser Thinbit Kendeco K-Tools Lawson Lovejoy Manchester Mapal McMaster Carr Micro 100 Mil-Tec Morse MSC Niagara Cutter OSG Precision Twist Primary Cutter Promax Putnam Seim Tool Silver & Deming SP3 Spec Tool Timeco Toshiba Tungaloy Twist Welden

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What types of cutting tools do you use the most?

INDEXABLE OR INSERT TYPE



SOLID CARBIDE ROUND TOOLS OR HSS



SPECIALS

Designed for a specific job 37%

OTHER MENTIONS (4%):

Bandsaw & Coldsaw Blades Brazed PCD Tools Broaches, Grinding Wheels, Diamond Dressers CNC Router Bits Diamond Mills High Speed Tool Blanks HSS Thread Chasers PCD Endmills, Drills Solid Carbide Thread Mills

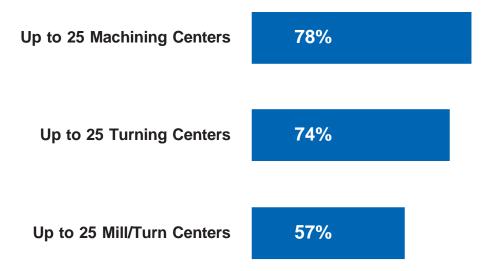
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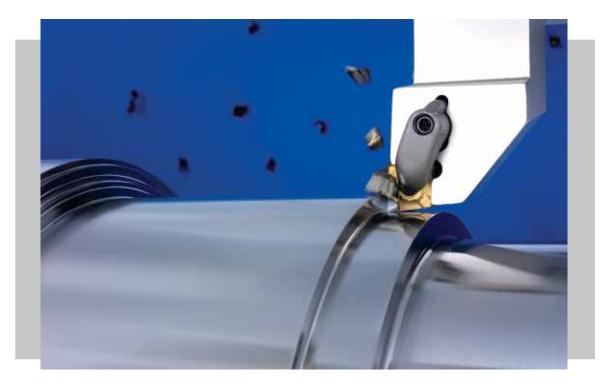
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How many Maching Centers, Turning Centers and/or Mill/Turn Centers do you have running in your plant?





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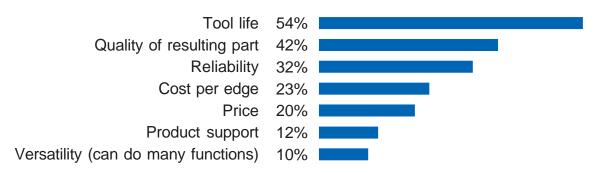
What is the ONE most important reason for choosing a certain brand of cutting tool?

Performance	62%	
Quality	9%	
Customer service	8%	
Past experience with Company	8%	
Product support	5%	
Price	4%	
Sales Representative	1%	1

OTHER MENTIONS (3%):

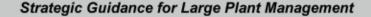
Fills Needs Technical and Product Support Price and Performance Corporate Recommendation

Which two of the following product attributes are the most important when choosing a specific brand of cutting tool to purchase?



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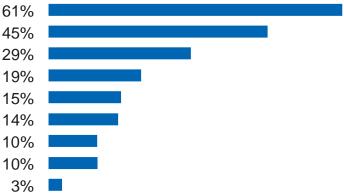


CUTTING TOOLS SURVEY

Which methods do you use most often to learn about what cutting tools are available in the marketplace?

- Trade publications/magazines 6
 - Company sales rep
 - Distributor 2
 - Peers/Word-of-mouth
 - Trade shows
- Company bochure or catalog
 - Company web site 1
 - Web search engine

Advertisement received in the mail



When will you/your company be evaluating/purchasing new cutting tools?

Currently evaluating 5 Within the next 6 months 1 Within 6 months to 1 year More then 1 year from now Have no plans 2



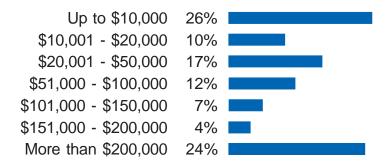
Do you feel that your cutting tool budget will be greater in 2008, about the same as 2007 or less then 2007?



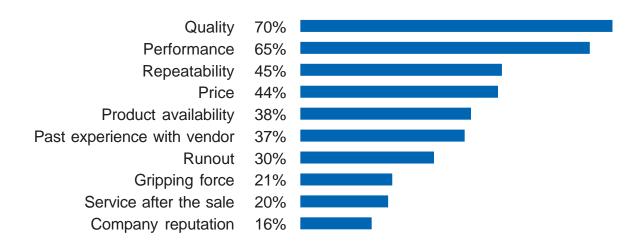
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What is your 2008 budget for cutting tools?



When purchasing tool holders for your cutting tools, what factors influence your decision on which brand of tool holder to purchase?



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What primary market segment are you involved in?

General Machining	26%	
Automotive	16%	
Aerospace	12%	
Farm and Off-Road	7%	
Oil & Gas	6%	
Medical	6%	
Defense	4%	
Mold & Die	4%	

OTHER MENTIONS (19%):

Analytic Instruments Appliance Motor Automation Machinery Circuit Boards **Commercial Food Preparation** Compressed Gas Equipment Consumer Products Consumer/Hand Tools **Cooling Towers** Defense & Aerospace Design & Build Special Machines Drive Production Education **Electrical Devices EMI** Shielding Fasteners Filtration Fire Hydrants & Pumps Fluid Moving Equipment Fuel Cells Handguns HVAC Ice Machines/ Appliances

Industrial Motors Injection Molding Lift Truck Machinery Building Manufacturer of Apparel & Industrial Marine Most To All of the Above At Any Given Time **OEM** Automotive Lifts Pharmaceutical Power Generation R&D Railroad Parts Supplier Scientific Analyzers Semiconductor Ship Construction & Repair Sporting Firearms Sporting Goods Telecommunications Turbo Machinery OEM Utilities Welding Equipment Wood Products

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CUTTING TOOLS SURVEY



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NELSON PUBLISHING CUSTOM RESEARCH utilizes the latest technological advances in data collection and assists you in every stage of the survey process including:

Consultation on research objectives Questionaire design Survey administration Data tabulation Results analysis and graphic charts

EXPERIENCE

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