

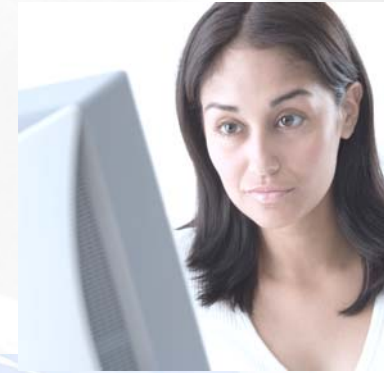


Online Quantitative Research Study

IWF 2008

Planned Attendance, Preferences and Overall Purchasing Intentions

April 2008



conducted by
Quail Run
BUSINESS SOLUTIONS



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WMMA surveyed attendees from the 2006 IWF to determine their plans for IWF 2008 as well as to understand a range of their views on the current business climate.

In addition to profiling respondents on a variety of business characteristics, the study also addressed:

- Plans for attendance at IWF 2008 including planned visits to the WMMA booth
- Ratings of company performance 2007 & 2008
- Single biggest obstacle to company's success over the next three years and reasons why
- Capital investments for 2008 – in total and by category
- Machinery/equipment purchases for 2008
- Financing for equipment purchases
- Importance of factors and resources in the equipment purchase decision
- Actions oriented to the “green” products movement and lean manufacturing
- Sales and production strategies utilizing to remain successful

This survey was conducted online among IWF 2006 attendees for which an e-mail address was available. The study was conducted under the WMMA name with reference to a partnership with IWF.

A total of 9,680 survey participants were sent an initial e-mail invitation on March 31, 2008 asking for their cooperation. A reminder followed on April 7, 2008. As an incentive to participate, those who entered their e-mail address were offered a sweepstakes entry to win one of five \$100 Visa gift cards.

By the closing date of April 11, 2008, 701 valid completions were received. After removing undeliverables and ineligible responses the effective response rate was 8.4%.

Survey results in this report are analyzed by the total response base of 701. Additionally, responses are segmented by several demographic variables and are provided in the full set of tables. The segmentation includes number of employees, business outlook for 2008, capital expenditure plans for 2008 and the importance of country-of-origin in the equipment purchase.

The research was conducted and analyzed by Quail Run Business Solutions on behalf of the WMMA.

At the time of the survey, the majority of respondents (80%) planned to personally attend IWF 2008 in Atlanta. About half report their company will be sending one or two representatives with the balance reporting three or more. Attendance plans are expected to match those of IWF 2006 for about two-thirds of respondents. About equal numbers are planning to send more as are planning to send fewer attendees this year compared to two years ago. The WMMA booth at IWF 2008 is a likely stop for many attendees. Eighty-five percent of respondents are to some degree likely to visit the booth for the technology demonstration. Thirty-one percent are extremely likely to visit the booth.

Attendance decisions are undoubtedly being made in the context of overall business performance for these companies. Sixty percent of respondents report that their 2007 business was excellent or good as compared to the past three years. Twenty percent say it was excellent. Another 30% say business was good. While slightly more (63%) say that 2008 is excellent or good, slightly fewer (17%) feel it will be excellent.

Many are finding niche marketing as the way to maintain positive business performance. Looking to new customers or expanding product offerings can open up new markets. Others look to productivity gains either through equipment upgrades or expansions or streamlining operations as an area of focus. The impact of the economy and the housing crunch has been felt, but comments indicate that many companies are trying to be nimble in order emerge intact and, potentially even stronger.

When asked to indicate the single biggest obstacle over the next three years from a preset list of options, the U.S. economy is chosen by 43% followed by the weak housing market at 24%. Recruiting/retaining skilled woodworkers is selected by 14%. In elaborating on these concerns, respondents often emphasize the interconnectedness throughout the system from production to the end consumer within the woodworking industry as well as the greater economy, both in the U.S. and globally.

Respondents are investing in their businesses. Just under one-third are planning to invest more than \$100,000 in their business in 2008. Forty-two percent are planning to spend more than \$50,000. Fifty percent or more of respondents are planning capital expenditures in the areas of software (56%), solid wood machining (52%), and/or finishing (50%).

Eighty-one percent of respondents either have already or are planning to purchase one or more of the more than 30 types of machinery/equipment identified in the survey. Computer software (29%), dust collection equipment (26%), sanding equipment (25%) and spray equipment (22%) lead the list.

With many options for financing, respondents were about twice as likely to use cash as compared to bank loans or lease/purchase as payment for major woodworking equipment purchases of \$10,000 or more over the past three years. Just under one-third of U.S. firms have ever used direct expensing or depreciation bonus as a federal tax incentive. Looking ahead, 21% are planning to use the U.S. federal stimulus package incentive to purchase equipment in 2008.

Tradeshows top the list as a valuable industry resource when looking for information about woodworking equipment manufacturers. Local distributors are most important when making purchases of supplies and in the service of equipment/machinery. Country-of-origin is somewhat important to respondents in the equipment purchase decision, but just as many think it is extremely important (13%) as think it is not at all important (15%).

Lean manufacturing concepts are being implemented by 42% of respondents with another 23% contemplating its use. The green movement is making inroads among respondents but still 52% are not using any green products. The use of composite wood panels without added formaldehyde (23%) and the use of FSC certified woods (22%) are the most common green product choices.

For WMMA members, WF 2008 should be an excellent opportunity to meet with prospective buyers. Based on current plans, attendance is likely to be strong with a fair amount of multiple representation from many companies. Furthermore, respondents indicate that tradeshow are a highly valued resource for obtaining information to make equipment purchase decisions. This venue appears to provide an optimum situation for meeting with existing customers to fine-tune their equipment needs and to connect with prospective customers.

Additionally, the WMMA booth can be expected to be a strong draw as respondents are inclined to visit the booth to view the technology demonstration.

While economic conditions may not be ideal, those surveyed are fairly optimistic about the current year. There is an interest in increased productivity and exploration of new market niches. Therefore, potential buyers will be predisposed to machinery/equipment decisions framed in that context.

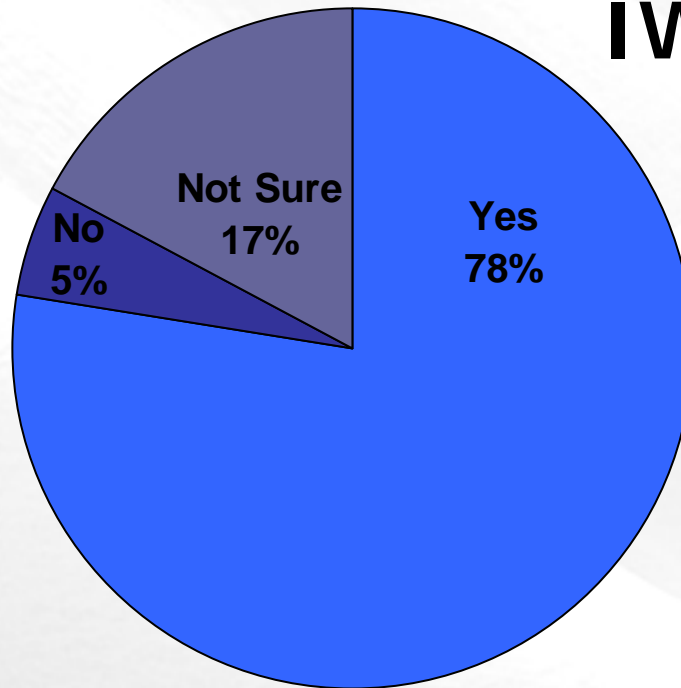


DETAILED FINDINGS



The vast majority (78%) currently plan to personally attend IWF 2008. Only 5% of those surveyed do not plan to attend. Seventeen percent are still unsure of their plans.

Whether Attending IWF 2008

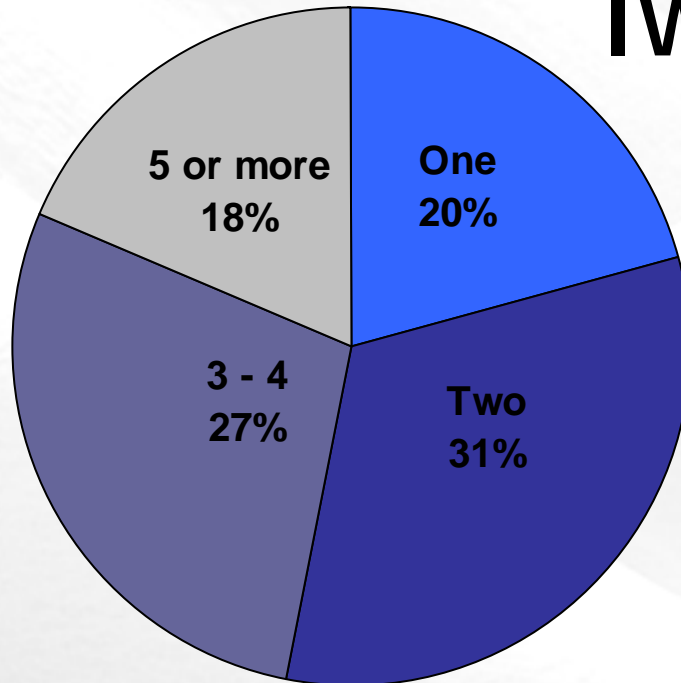


Q: Do you personally plan to attend IWF 2008, August 20-23, in Atlanta?

n=701

Twenty percent of respondents expect to be the only one from their company that will attend IWF 2008. Thirty-one percent will attend with one other company representative. Forty-five percent will have more than two from their company at IWF 2008 with 18% expecting to have five or more individuals attend.

Number Attending IWF 2008



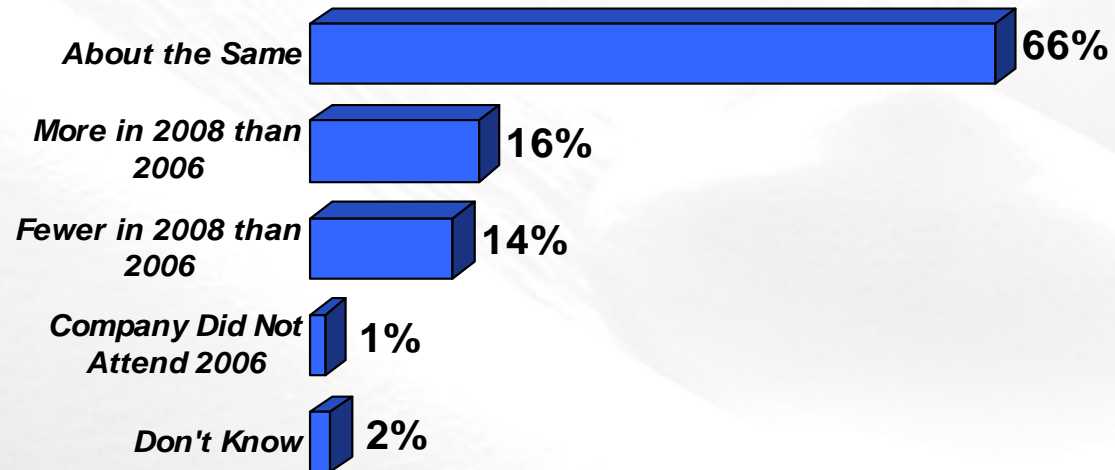
Mean = 3.8
Median = 2.0

Q: How many people from your company do you expect will attend IWF 2008?

n=701

The vast majority of respondents are expecting their company's 2008 attendance at IWF to be comparable to 2006. About equal numbers are planning more as are planner fewer to be in attendance this year.

IWF Attendance: 2008 vs. 2006

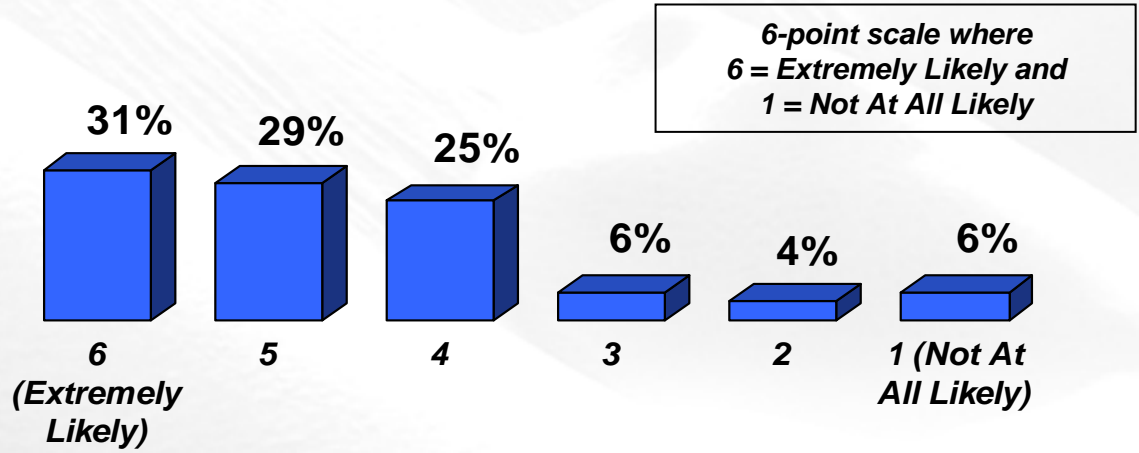


Q: How does this compare to your company's attendance at IWF 2006?

n=701

More than 80% of respondents are likely to visit the WMMA booth at IWF 2008 (rating of 4-6) to see the technology demonstration. Sixty percent are highly likely (rating 5 or 6) to visit the WMMA booth for this technology showcase with 31% percent saying they are extremely likely to stop at the booth.

Likelihood of Visiting WMMA Booth at IWF 2008

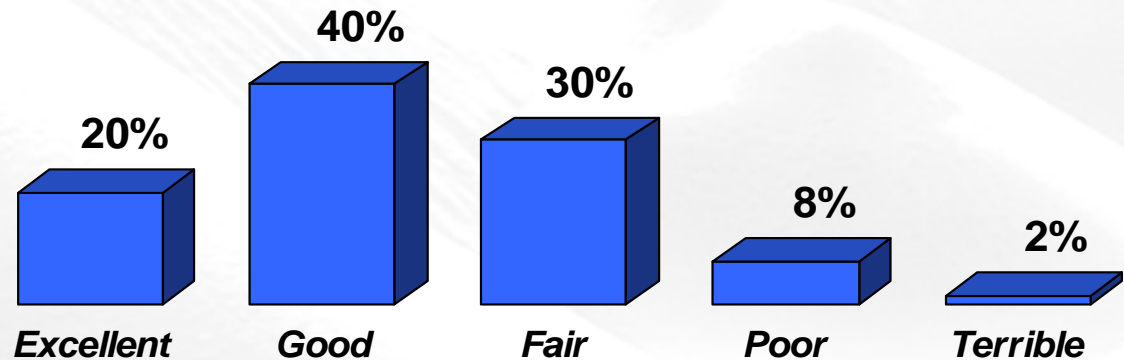


Q: The Wood Machinery Manufacturers of America (WMMA) is planning to showcase technology in a demonstration center at the IWF 2008. Please indicate the likelihood you will visit the booth to see the technology demonstration.

n=701

Despite many negative economic factors in 2007, responding firms still feel positively about their business performance as compared to the prior three years. Twenty percent rate their 2007 performance as excellent. Forty percent rate it as good with 30% saying their performance was only fair. Only 10% rate their performance as poor or terrible.

2007 Business Performance Compared to Past 3 Years

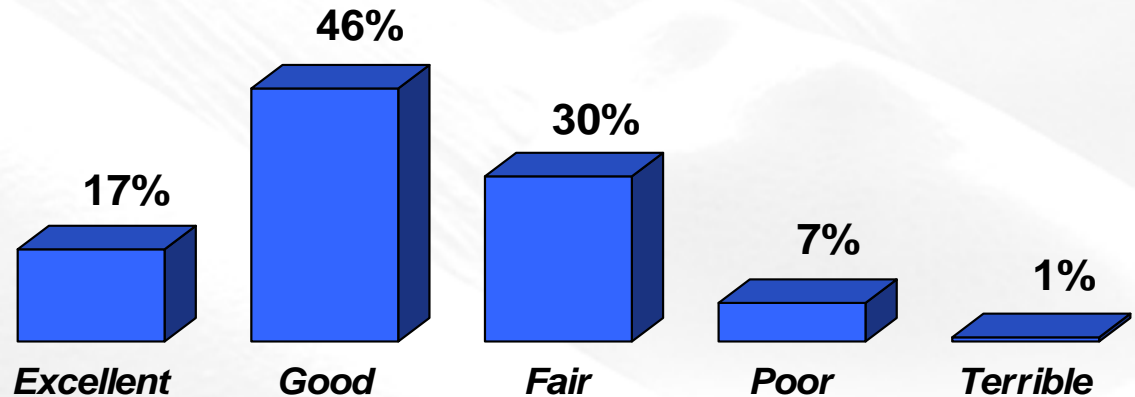


Q: In comparison to the last 3 years, how would you rate your company's business for calendar year 2007, the year just ended?

n=701

Just over 60% of respondents are expecting 2008 to be an excellent or good business year for their company. Another 30% are expecting a fair performance.

2008 Expected Business Performance

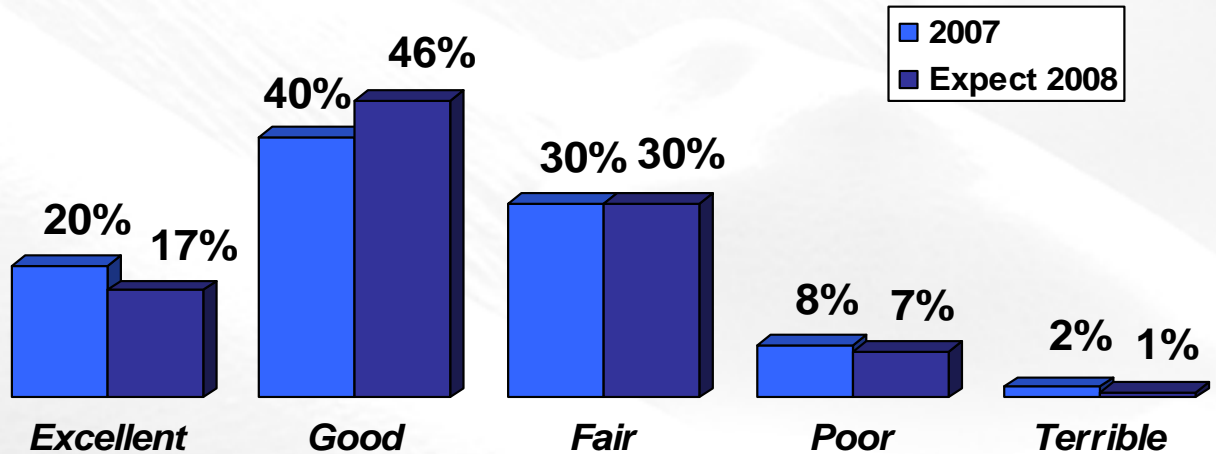


Q: How well do you expect your company to perform in calendar year 2008?

n=701

In comparison, there is a slight shift between ratings of excellent and good comparing 2007 to 2008 with slightly fewer rating expected performance as excellent in the current year.

2007 Business Performance Compared to 2008 Expected Performance



Q: In comparison to the last 3 years, how would you rate your company's business for calendar year 2007, the year just ended?

Q: How well do you expect your company to perform in calendar year 2008?

n=701

Reasons for weakness or strength in performance are as varied as the companies surveyed. Circumstances that often drive a positive outlook are due to a company's niche market and often an aggressiveness that has them expanding beyond their comfort zone. Equipment is noted by many as a means to improve productivity while they also focus on new business opportunities.

A full list of verbatim responses is provided in Appendix A.

Comments of a positive nature:

At the present time we have a year's worth of work under contract and are looking forward to the next 3 years with clients waiting on us.

Better product offerings and more streamlined and efficient manufacturing processes.

By utilizing new technology, we have increased the throughput of our plant, thus making us more competitive within our market segment.

From 2006 to 2007 our annual sales doubled. We expect the same or greater for 2008.

I build cabinets, I'm booked 6-7 months out and I can be choosy about the jobs I take and the people I work for. I am getting the prices I need to earn a good living and build my business. I'm a small company and not making millions (yet) but I think being small with virtually no overhead has helped especially in this tight economy.

I expect sales to be up 20% over 2007.

I only do custom work and have a steady backlog of work and steady group of repeat clients. All new business comes from referrals from my client base.

Judging from the number of quotes we have outstanding, I believe that if the commercial business continues the way it is and residential picks up a little, we should have a very good year.

Our concentration in the multi-unit portion of the industry has kept sales growing in this market.

Remodeling is up in my area and remodels generally upgrade the cabinet used. I've had more inquiries in the last 6 weeks than I had all of last year. So far sales are well ahead of 2007, almost double for the comparable period.

The high-end custom market is as strong as ever. The detail level seems to be heightening as years go by. The more complicated a project gets, fewer companies compete for the job.

The market had slowed during 2007, but it appears that the tide may be swinging around. Plus I am offering different service now to help my business survive.

The quality and quantity of commercial projects to bid on has been much better in 2008.

We expect to do about 30% more in sales in 2008 than in 2007. We've expanded our territory and hired more employees to meet the demand. We've also bought some equipment that should help with production.

Q: Can you elaborate on your expectation for your company's performance in Calendar 2008?

Comments of a negative nature:

2008 expectations will be the same or lower than 2007 due to the U.S. economy, the housing market, and an election year.

Business was poor last year and this year doesn't seem to be any better if not worse. Overseas and the economy are killing the wood industry.

December 2007 we saw a sudden drop in orders. For 2008 orders are down 35% compared to 2007. Based on the housing foreclosure mess, I don't see my business increasing until early-mid 2009. I hope I am wrong!

Flat sales with no growth and striving to maintain costs and margins.

Poor to fair due to the downturn in the U.S. housing market coupled with high Canadian dollar.

Weak economy in U.S. Offshore competition. Rising costs.

They have decided to close this facility.

Mixed Comments:

Because our clients are in the top 5% income bracket we are generally insulated from economic downturns. However, I am tentative about the future and feel we need more advanced equipment in order keep up.

Business is off about 10%. We are reorganizing to take advantage of new technologies—software.

Commercial work is keeping us in the black. Residential is near dead.

Due to credit tightening, we anticipate fewer companies qualifying for financing.

Hopefully by changing focus we can survive!

More aggressive sales and marketing to maintain past volume.

On the verge of expanding two lines and creating a new product with recycled material.

The downturn in the economy has us pricing more aggressively and chasing more custom projects.

Due to the economic situation in the woodworking industry, just as good as we did in 2007 would be great.

Q: Can you elaborate on your expectation for your company's performance in Calendar 2008?

The overall U.S. economy is seen as the major obstacle to the success of companies in the next three years. More than two out of five respondents choose this factor as posing the single biggest obstacle. The weak housing market is identified by almost one out of four.

Biggest Obstacle in Next 3 Years



* See Appendix A for full listing of verbatim comments (for "Other").

Q: Which one of the following issues poses the single biggest obstacle to your company's success over the next 3 years?

n=701

As a follow-up question to the identification of the single biggest obstacle to their company's success over the next three years, respondents were asked to indicate why they chose a particular response. A full set of verbatim comments is provided in Appendix A. However, a sampling of respondent reasons are provided here for the Top 3 obstacles which include the "U.S. Economy", the "Weak Housing Market" and "Recruiting and Retaining Skilled Woodworkers."

In the case of the U.S. Economy, reasons provided often relate to the interconnectedness of markets and customers in the U.S. as well as with other trading partner countries.

Reasons The U.S. Economy is The Biggest Obstacle For Next 3 Years:

A downturn could lead to less travel/tourism which could delay plans to build hotels.

A soft economy impacts all my customers, residential (cabinets, doors, etc.) and office furniture and millwork.

A weak economy will make it difficult to continue our aggressive growth rates, which we are striving to achieve.

Although we have found good pockets of construction, the general consensus among our dealers is that the economy has to improve in order for the year to be worthwhile. Too much negativity is not good, and it is hard to overcome that negativity every single day. We need some positive economic news. Most of our dealers are looking at the current economy as an opportunity to improve their standing in their respective markets.

Anything to do with the housing industry is down in our area. Tourism is also down due mostly to the gas prices. Our business has done very well because we do some unique products.

Because if people are losing their jobs they aren't buying new houses or remodeling them.

Cost of equipment, raw goods, tools are increasing. With taxes and gas prices on the rise, some customers cannot afford to purchase some of these products or services, especially from custom shops where the prices seem to be higher due to higher-end products. People want it quick and cheap. With the economic crunch going on, I believe this will become a strain on small shops.

Credit tightening, lack of capital, companies' fear of spending.

Dollar devaluation; high energy prices; poor response to environmental issues; wasteful government spending.

Everything is costing more. People are spending less. Most people have less discretionary income available to spend on non-essential items.

I don't think the economy will be bad. But, my customers are being told the economy will be bad.

I feel that if we have a serious round of inflation due to increasing oil prices, and our government doesn't curb spending, we could see a serious round of inflation. This could adversely affect long-term project margins.

If the overall economy is healthy then I feel the housing market will rebound.

If there is a recession in the U.S., there is a good chance we will be affected in Canada. We don't have the same exposure to sub-prime woes, but can only be hurt by a general U.S. slowdown.

Q: Why do you feel The U.S. Economy is the single biggest obstacle to your company's success over the next 3 years?

***Reasons The U.S. Economy is The Biggest Obstacle For Next 3 Years:
(Cont'd)***

If there isn't an upturn in the U.S. economy, we could expect the other markets in which we are operating to get a bit crowded with other producers. It could also be that a bad recession in the U.S. could drag other countries.

It affects everything and the rate of exchange is going to be higher.

Less money for clients to spend on items my company produces. Much higher level of competition based on price. More need to sell the concept of value.

Office furniture buying normally slows down when the economy is weak, and that is exactly what we are experiencing now.

Our customer base, being in the retail market, relies a lot on how strong the economy is. Especially during the first couple of quarters each year.

People buy cheaper non-custom pieces when things are tight. Custom work takes a downturn.

The answer is obvious. When people have confidence in the economy they spend money. They have been told how bad things are for seven years. Now they are starting to believe it.

The overall health of the U.S. economy fuels most businesses, especially ours which is not need-based and can be delayed until family economics are better.

The slowdown in the housing market has hurt our sales the most and until the housing market picks back up our sales will suffer. However, we are branching out into new areas and implementing new processes and procedures to make the company more efficient.

The U.S. is our biggest customer. If the economy is not doing well, then we aren't.

We depend on commercial construction and high-end housing. Both of these are tied to a robust economy.

We rely on remodels to fill in the gaps between new construction. If the economy stays slow people will just live with what they have.

Between the weak dollar and the uncertainty of the presidential election, I expect to see a higher percentage of small businesses fail.

Q: Why do you feel The U.S. Economy is the single biggest obstacle to your company's success over the next 3 years?

Clearly, those that are deeply tied to the housing industry are more likely to be severely affected by the weak housing market.

Reasons The Weak Housing Market is The Biggest Obstacle For Next 3 Years:

90% of my work comes from new builds. So far I'm staying busy as ever but I see a lot of builders struggling.

A large part of our business is tied to residential construction. Eventually the slowdown will affect sales.

A substantial portion of my most profitable work is tied to high-end architectural renovations. I do the extra added details that are the first to be cut. Also with less mobility people order fewer custom pieces of furniture.

About 25-30% of our business is residential kitchens. We have had to up our minimum house price from \$750,000 to \$1,000,000 as this part of the market has not slowed as much.

All the laminated components I make are used for furniture, kitchen cabinets and bathroom vanity cabinets.

Because if the demand is very tight, the level of prices can be down.

Because of the frivolous loans that were given to people that could not afford them, and now we have to bail out the mortgage companies that gave the loans!!!!!!!!!!

Business is 100% new-construction driven.

Due to the fact that the Florida market was our biggest customer we have had to go out of state for other business.

Housing market is a key driver for the kitchen and bath industry.

It's hard to sell cabinets when there aren't any houses being built to put them in.

Low demand and low prices.

Many of our items are sold through retail channels and when the shoppers don't visit to spend, we lose sales.

Money troubles with foreclosures. Less money available for home improvement projects. Closets are still a luxury item for most people.

New housing starts are down and present homeowners not spending \$ on their own properties.

New housing starts reduce the amount of opportunities that you have to bid. Less opportunities, less business.

Q: Why do you feel The Weak Housing Market is the single biggest obstacle to your company's success over the next 3 years?

***Reasons The Weak Housing Market is The Biggest Obstacle For Next 3 Years:
(Cont'd)***

Our product is for the housing industry and if new housing starts are down we fall back on remodels but with the dollar being so unstable nobody wants to spend.

The housing market drives the economy with a great deal of ancillary jobs—it's too broad to just say housing. Housing consists of so many trickle-down jobs—so until that market resumes some form of normalcy, we're all in for a rocky ride.

We are directly impacted by the housing market. If the market turns around sooner than the second half of 2009 then we should see improvement in the overall business. If however the economy does not rebound then the domino effect occurs.

We were installing our custom cabinets for a contractor at about a rate of one set a week. Now this same contractor is wanting us to sell him factory cabinets because he doesn't have room in his budget for the custom cabinets.

We work with cabinet shops that do kitchen remodels. Their business is slowing due to home sale values decreasing—no more equity lines to do remodels.

When we finish going through this downturn, we believe there will be a much better opportunity for better margin orders and a larger market share for those left in the market.

Q: Why do you feel The Weak Housing Market is the single biggest obstacle to your company's success over the next 3 years?

Every industry has its own challenges with recruiting and retaining skilled workers. For the woodworking industry, many point to a loss in the availability of skilled craftsmen, particularly with fewer young people learning the necessary trades. Others point to difficulties providing an adequate wage to compete with other industries for employees.

Reasons Recruiting & Retaining Skilled Woodworkers is The Biggest Obstacle For Next 3 Years:

At our current growth rate we have not been able to find enough skilled labor to accommodate our increased production.

Because in order to get advantages over the rest, technology comes in first place, but when you have it, recruiting or retaining skilled people becomes an obstacle because there are always people needed to operate technology.

Can't find good, experienced, skilled, reliable help.

Competing with low-cost labor from abroad. Hard to pay good wages here and compete.

Cost of doing business is too high, therefore not being able to pay appropriate wages.

Even with advanced equipment our product is complex and must be interpreted and produced by skilled woodworkers.

Few young persons are thinking career, most are thinking job. They have been conditioned to move around in the job market instead of putting down roots.

Finding the right people to fill the skilled jobs and retaining those employees has in the past been a major challenge for our company, and I expect that to continue to be a challenge.

General lack of young workers entering into woodworking as a career.

High-tech jobs are easier, have better working conditions and pay double.

I have a hard time producing quality products on time when my work force makes too many mistakes. My ability to compete on pricing depends on customized quality work that can't be done by just any shop.

Implementing Lean Manufacturing requires skilled workers who can work in several areas. Those types of workers are hard to find. You can't just throw temps at a job. The skilled workers are more efficient than temps.

It is hard to find true craftsmen that understand the quality level expected on a \$100,000-plus kitchen.

Labor is very hard to find in this area. I do think that with residential slowing down that the skilled workers will end up looking for jobs.

Q: Why do you feel Recruiting/Retaining Skilled Woodworkers is the single biggest obstacle to your company's success over the next 3 years?

Reasons Recruiting & Retaining Skilled Woodworkers is The Biggest Obstacle For Next 3 Years: (Cont'd)

Not enough craftsmen in the area. Hard to import them from 30-50 miles away.

People do not want to work with their hands anymore.

Skilled employees are the best asset a company can have. It's not the simplest task to obtain them.

The availability of people who want to work and can get to work and be a committed employee is very limited in our locale. Many of the manual labor workforce in this area have not seen or witnessed high-end housing or fixtures and therefore don't understand the quality that our company is trying to achieve.

The people we get walking through the door don't know anything about manufacturing or can't read a tape measure.

There just aren't the people out there with the proper skill set or desire.

With the standards that we hold and what has been set down by the company president, it is a different working environment than most places. We live in a small community and the work force is a challenge for most companies, even more so if you are looking for skilled labor.

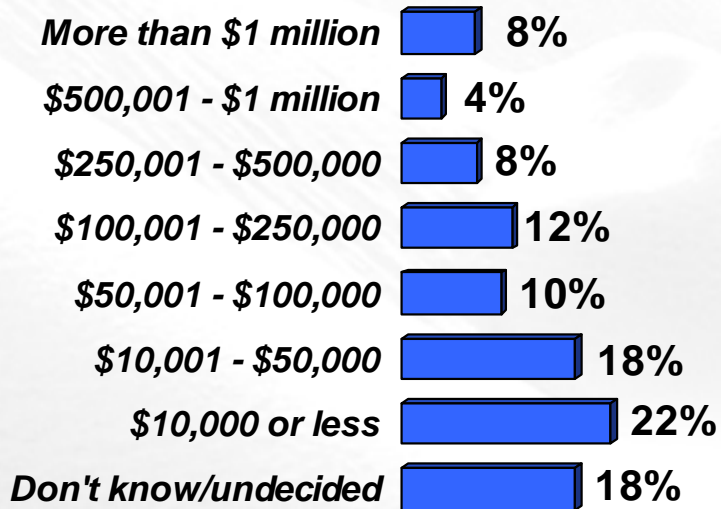
It is very difficult to find skilled people. And the number of new people you have to go through to find a keeper is very expensive.

Younger people do not want to do physical or skilled labor. The work ethic has changed. No one wants to earn a living.

Q: Why do you feel Recruiting/Retaining Skilled Woodworkers is the single biggest obstacle to your company's success over the next 3 years?

Capital investments for 2008 span a wide range among respondents. While 22% are expecting to spend \$10,000 or less, 20% are planning to spend in excess of \$250,000. Eight percent are expecting to purchase in excess of \$1 million. Many are still undecided.

Expected Investment in Capital Improvements in 2008



Q: Approximately how much will your company invest in capital improvements in 2008?

n=701

Fifty percent or more of respondents are planning capital expenditures in the areas of software (56%), solid wood machining (52%), and/or finishing (50%) in 2008. Assembly and dust control are slated for capital investment by 44% each in 2008. Expectations for capital investments in 2008 are lowest for veneering (19%) and laminating (23%).

Panel processing, laminating and solid wood machining have the highest mean levels of expenditures among those planning to making capital expenditures in these areas.

Expected 2008 Capital Expenditures by Category—Ranked by Mean \$

Expected 2008 Capital Expenditures	Mean*	% Planning Expenditures	% Spending \$0	Don't Know/ Undecided
Panel Processing	\$65,656	35%	47%	19%
Laminating	\$53,781	23%	58%	19%
Solid Wood Machining	\$48,292	52%	29%	19%
Wood Waste Management	\$42,435	28%	51%	22%
Veneering	\$41,617	19%	63%	18%
Finishing	\$41,523	50%	33%	17%
Assembly	\$37,006	44%	38%	18%
Software	\$34,321	56%	24%	21%
Dust Control	\$28,722	44%	36%	20%

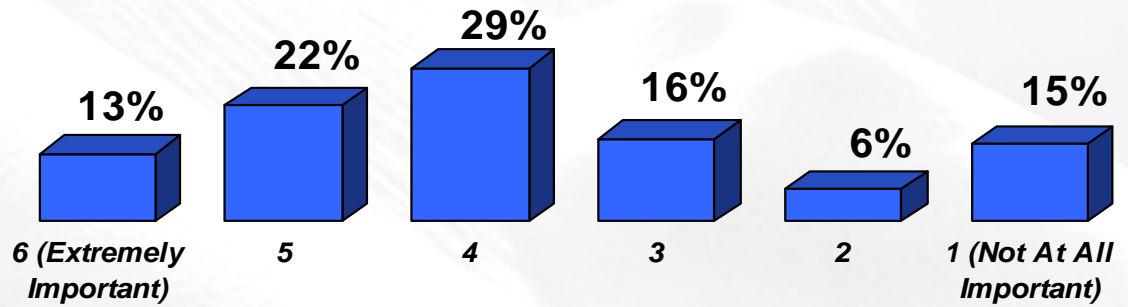
*Mean based on those who reported capital expenditures in that category.

Q: Which of the following areas will your company's 2008 capital expenditure programs target? For each category, please indicate how much your company will spend.

n=701

Respondents are split in the importance of country-of-origin when purchasing equipment. About equal numbers feel this factor is “extremely important” (13%), as feel it is “not at all important” (15%). In general though, respondents are more likely to feel this factor is, to some degree, important in their decision.

Importance of Country-of-Origin



6-point scale where
 6 = Extremely Important and
 1 = Not At All Important

(Mean = 3.8)

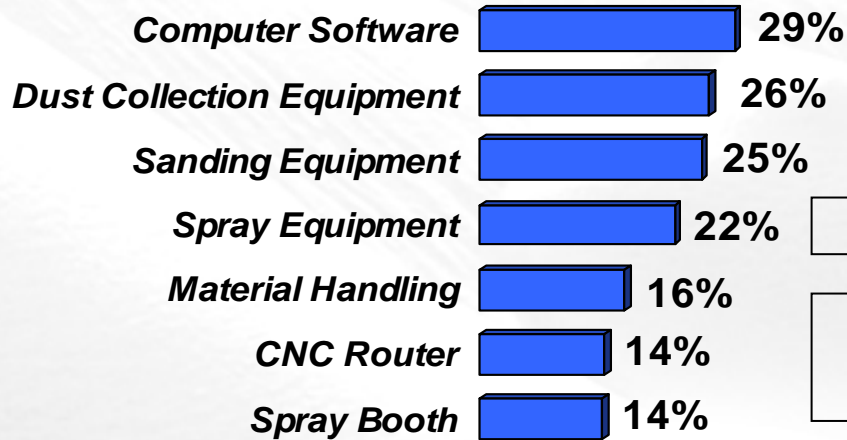
Q: How important is the country-of-origin (where a piece of equipment was manufactured) to your ultimate equipment purchasing decision?

n=701

About eight out of ten respondents have bought or intend to buy one or more of the 32 types of machinery/equipment identified in the survey or indicate some other type of equipment purchase in 2008.

Most individual categories are noted by 10% or less of respondents. Three categories are noted by at least one out of four as an area of purchase for the current year. These include computer software, dust collection and sanding equipment.

Machinery/Equipment Bought/Intend to Buy 2008



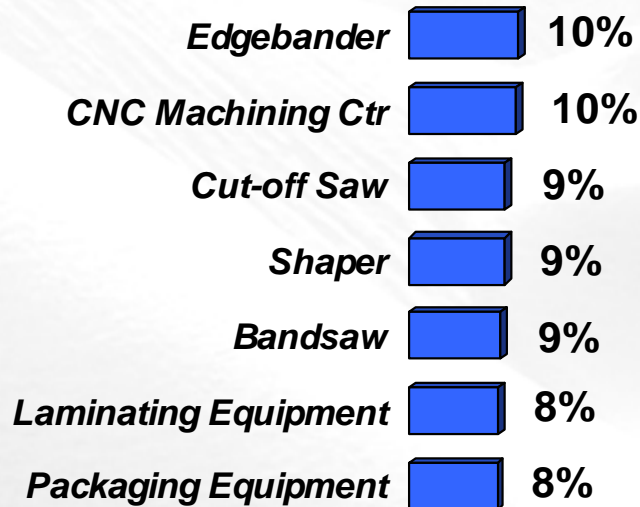
Slide 1 of 5 in Series

19% Do Not Intend to Purchase in 2008

Q: What types of machinery/equipment, if any, have you already bought in 2008 or are you planning to buy in 2008?

n=701

Machinery/Equipment Bought/Intend to Buy 2008—continued



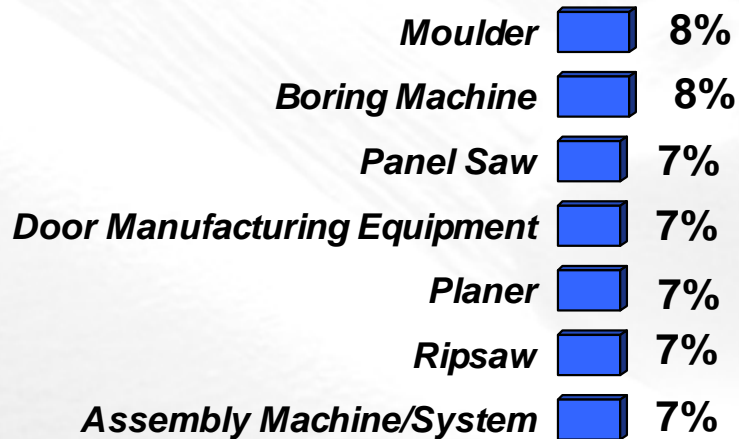
Slide 2 of 5 in Series

19% Do Not
Intend to Purchase
in 2008

Q: What types of machinery/equipment, if any, have you already bought in 2008 or are you planning to buy in 2008?

n=701

Machinery/Equipment Bought/Intend to Buy 2008—continued



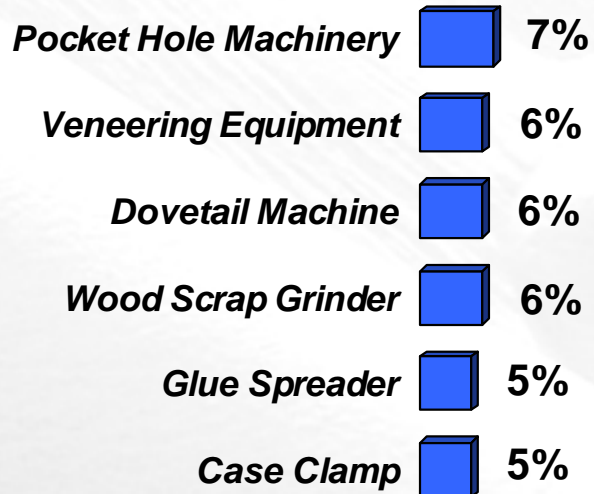
Slide 3 of 5 in Series

19% Do Not Intend to Purchase in 2008

Q: What types of machinery/equipment, if any, have you already bought in 2008 or are you planning to buy in 2008?

n=701

Machinery/Equipment Bought/Intend to Buy 2008—continued



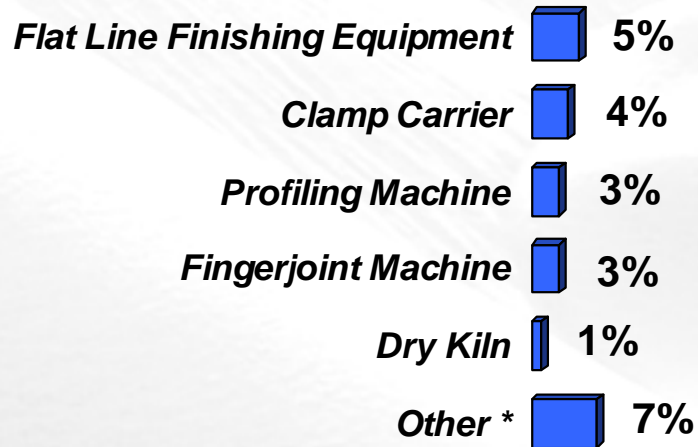
Slide 4 of 5 in Series

19% Do Not
Intend to Purchase
in 2008

Q: What types of machinery/equipment, if any, have you already bought in 2008 or are you planning to buy in 2008?

n=701

Machinery/Equipment Bought/Intend to Buy 2008—continued



Slide 5 of 5 in Series

19% Do Not Intend to Purchase in 2008

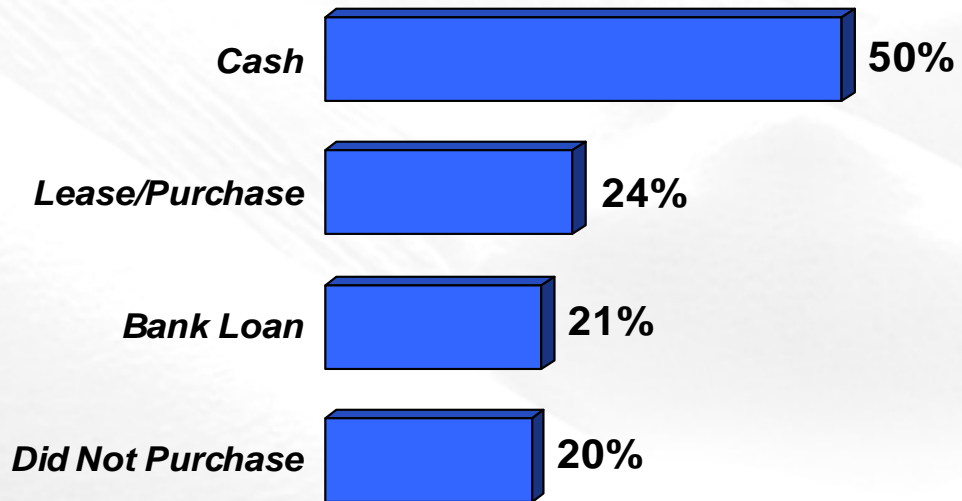
* See Appendix A for full listing of verbatim comments (for "Other").

Q: What types of machinery/equipment, if any, have you already bought in 2008 or are you planning to buy in 2008?

n=701

Cash leads as the form of payment for equipment of \$10,000 or more purchased in the past three years. Fifty percent have paid cash. Equipment has been acquired using a lease/purchase agreement by 24% of respondents with about one out of five reporting use of bank loans. Twenty percent reported they did not make an equipment purchase of \$10,000 or more in this time period.

Financing Past 3 Years Equipment \$10,000 or More



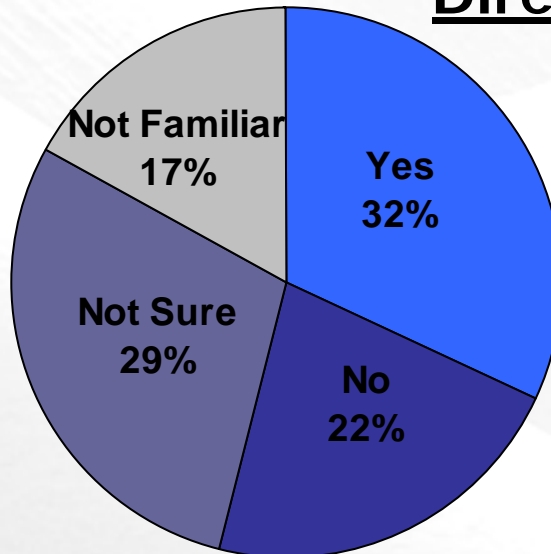
* See Appendix A for full listing of verbatim comments (for "Other").

Q: Which of the following did you use to pay for major woodworking equipment purchases of \$10,000 or more during the past 3 years?

n=701

Just under one third of respondents from U.S. firms have used direct expensing as a U.S. Federal tax incentive to purchase equipment. Another 22% have not used this incentive. Many are not sure/unfamiliar.

Whether Ever Used U.S. Federal Tax Incentive to Purchase Equipment: Direct Expensing

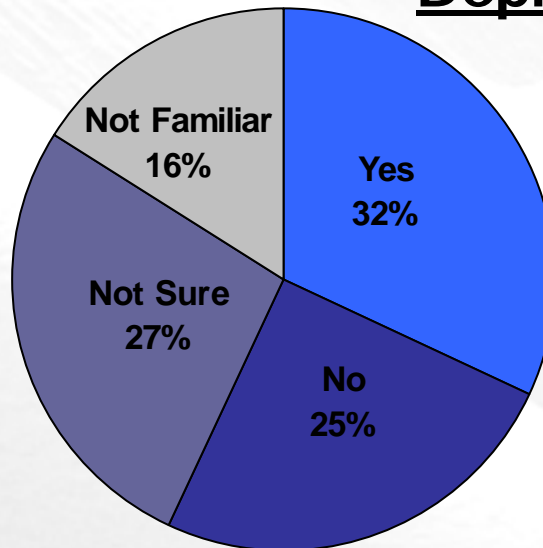


Q: Has your company ever taken advantage of the following U.S. federal tax incentives to purchase equipment?

n=615 (Based on those located in the U.S.)

An equal percentage of respondents in the U.S. have used a depreciation bonus as a Federal tax incentive to purchase equipment as have used direct expensing.

Whether Ever Used U.S. Federal Tax Incentive to Purchase Equipment: Depreciation Bonus

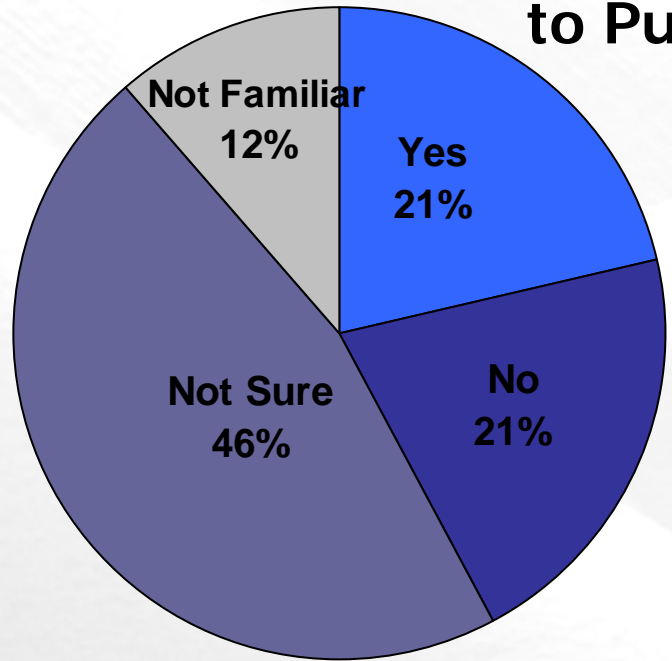


Q: Has your company ever taken advantage of the following U.S. federal tax incentives to purchase equipment?

n=615 (Based on those located in the U.S.)

Nearly half are uncertain about using the U.S. Federal Stimulus Package to purchase equipment in 2008. One of 5 intend to do so, with an equal proportion saying "no". More than 1 of 10 are not familiar with the programs (direct expensing and depreciation bonus).

Whether Plan to Use U.S. Federal Stimulus Package to Purchase in 2008



Q: Will your company take advantage of either of these incentives (direct expensing/depreciation bonus) offered in the 2008 U.S. Federal Stimulus Package to purchase equipment this year?
n=615 (Based on Companies Located in the U.S.)

Tradeshows are rated as a highly valuable resource to get equipment manufacturer information during the purchase decision process. Seventy-six percent rate it a 5 or 6 on the six-point scale with a mean of 5.0. The Internet follows with 65% highly valuing this resource.

Local distributors/sales reps, company literature and trade publications are relatively comparable to each other in the value respondents place on them during the woodworking equipment purchase process.

Value of Industry Resources When Purchasing Woodworking Equipment

Industry Resources	Mean	Top 2 Box (Rating of 5 or 6)
Tradeshows	5.0	76%
Internet	4.8	65%
Local Distributor/Sales Rep	4.3	53%
Company Literature	4.3	47%
Trade Publication	4.3	46%

**6-point scale where
6 = Extremely Valuable and
1 = Not At All Valuable**

Q: Please rate the value of each of the following industry resources for finding information about manufacturers of woodworking equipment during an equipment purchase process.

n=701

Local distributors are most important in the purchase of supplies and in the service of equipment and machinery. About 70% rate local distributors as highly important in these areas with an overall importance mean of 4.8 on the six-point scale.

The importance of a local distributor for tooling is noted as highly by 63% with a mean of 4.6. There is little difference in the importance of a local distributor when purchasing equipment/machinery at levels below \$10,000 or equal to or above that level.

Importance of Local Distributor by Type of Purchase—Ranked by Mean

Types of Purchases	Mean	Top 2 Box (Rating of 5 or 6)
Supplies	4.8	69%
Service of Equipment/Machinery	4.8	70%
Tooling	4.6	63%
Equipment/Machinery Under \$10,000	4.2	46%
Equipment/Machinery \$10,000 or More	4.0	46%

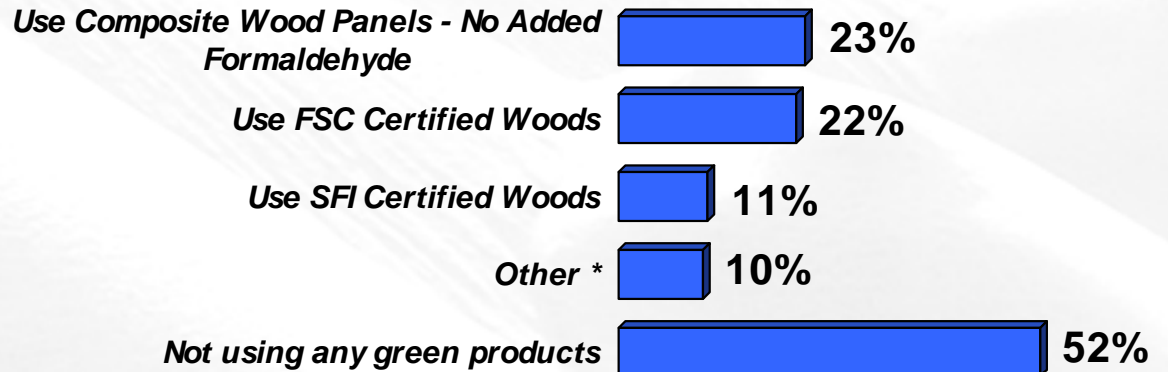
**6-point scale where
6 = Extremely Important and
1 = Not At All Important**

Q: How important is a local distributor for each of the following purchases?

n=701

Forty-five percent are responding to the “green” movement through use of various products. The most common are the use of composite wood panels with no added formaldehyde and/or the use of FSC certified woods.

Response To "Green" Products Movement



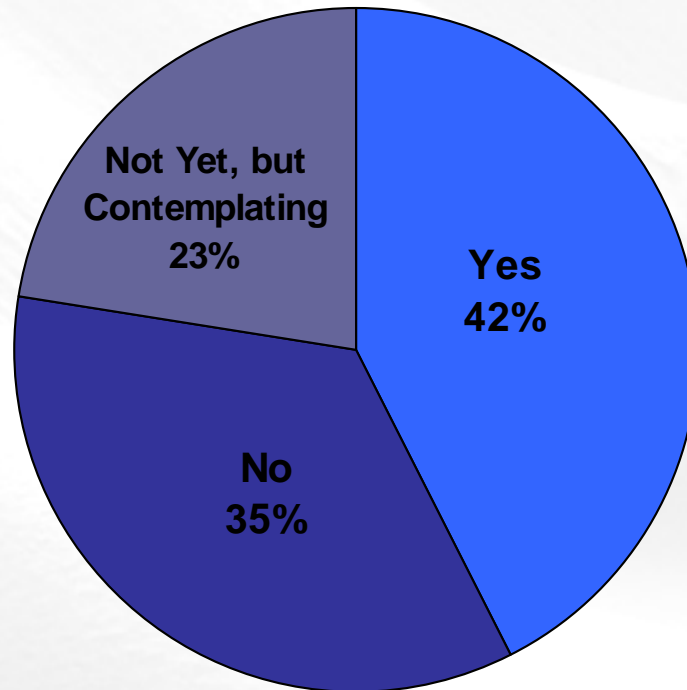
* See Appendix A for full listing of verbatim comments (for “Other”).

Q: How, if at all, is your company responding to the “green” products movement?

n=701

Forty-two percent of respondents are already implementing lean manufacturing concepts. Twenty-three percent are not currently doing so but are contemplating the use of these concepts.

Whether Implement Lean Manufacturing



Q: Has your operation implemented Lean Manufacturing concepts?

n=701

Survey respondents are engaging in a wide range of activities to improve their bottom line via both sales and production strategies. These include, but are not limited to the following:

- Product line expansion and diversification
- Green marketing
- Strengthening Internet presence
- Expansion of sales force, training and customer databases
- Equipment updates/upgrades to improve efficiency
- Stronger marketing programs

A full list of verbatim responses is provided in Appendix A.

New Sales and Production Strategies:

- More direct visits to our customers, rather than relying on furniture shows.
- Diversify product line, cut labor, lower inventory, and faster lead times.
- Sales training to key associates. More personal contact with current customers. Combine jobs, more cross-training, making smaller lots.
- Provide JIT supply to selected customers.
- New products, improved quality, on-time shipping.
- Added two factory lines of cabinets diversifying: light commercial, remodeling, closets.
- Implemented shorter turn-around time on order filling and a can-do-everything for the customer philosophy.
- We have been working to increase brand awareness by upgrading our literature, show booths, etc. We have also continued to develop new products into our product line to continue to offer more variety while maintaining a product that will compete with our competitors.
- Beginning stages of implementing lean manufacturing.
- Eliminating poor performing SKU's, purchasing equipment to eliminate labor, tracking product flow, reducing waste by outsourcing dimension lumber on poor yield items.
- Opened a second showroom. Direct sales to builders including new product lines. Added factory cabinet lines in addition to our own custom line.
- Customer purchasing database.
- A new market strategy plan and market material.
- Implemented a website.
- Will concentrate on some plastic and metal working business.
- Expanded our product offering.

Q: What new sales or production strategies, if any, has your company initiated to remain successful?

New Sales and Production Strategies: (Cont'd)

Developing products to consume our own manufacturing capacity versus procurement of these products.

Diversified during last 5 years to maintain sales levels.

Commercial products - green products.

We are focusing on the basics.

We are in the process of updating our website to become more user friendly. In 2006 we purchased a CNC and at the IWF we purchased a gang rip, moulder and knife grinder. We are letting our contractors and contractor in the area know of our machinery and the capabilities we now have. We are also in the process of erecting a new 8000 sq. ft. facility.

Always calling on new accounts. Have picked up several new customers already this year.

We use direct marketing. Find the customers we want to solicit and sell them direct, versus letting the customers come to us.

Structured payment plans.

The green movement has been very big for us.

Moving from dealer installation to big box retail sales.

Aggressive marketing, introducing new products, certification for Environmental Stewardship (KCMA ESP), working on FSC Chain of Custody certification, pricing.

Strategic marketing and target mailing.

Cost is King! Any strategies that will drive manufacturing/assembly cost down are being examined. As most of the large retailers go to online bidding for their store fixtures we have to reduce manufacturing cost to remain competitive.

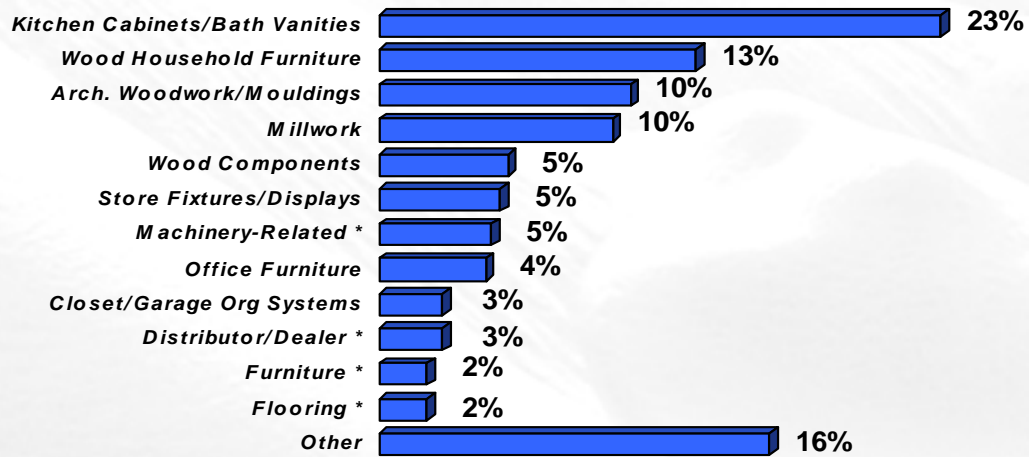
Have hired a business coach.

Lean manufacturing and development of products to help sales combat with a weaker economy.

Q: What new sales or production strategies, if any, has your company initiated to remain successful?

Respondents span a wide range of product focus. The largest segment is primarily involved in manufacturing kitchen cabinets and bath vanities. Wood household furniture (13%) follows with 10% each involved in millwork or architectural

Primary Product



*** Not prelisted response.**

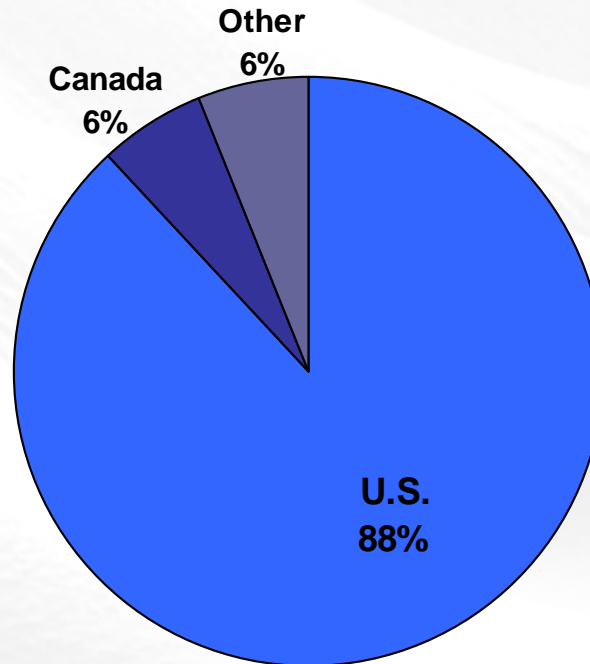
See Appendix A for full listing of verbatim comments (for "Other").

Q: What is the primary product your company manufactures?

n=701

The vast majority of respondents are located in the United States (88%). Respondents also represent Canada and various other foreign locations.

Location: Country



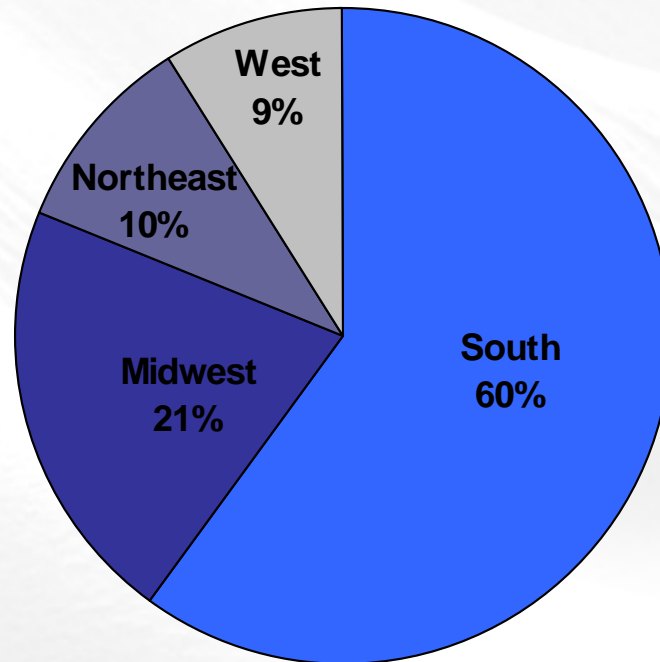
See Appendix A for full listing of verbatim comments (for "Other").

Q: Please indicate the main geographic location of the office/plant where you work.

n=701

Sixty percent of respondents from the U.S. report they are located in the South. The Midwest follows at 21% with the Northeast and South about equal in representation.

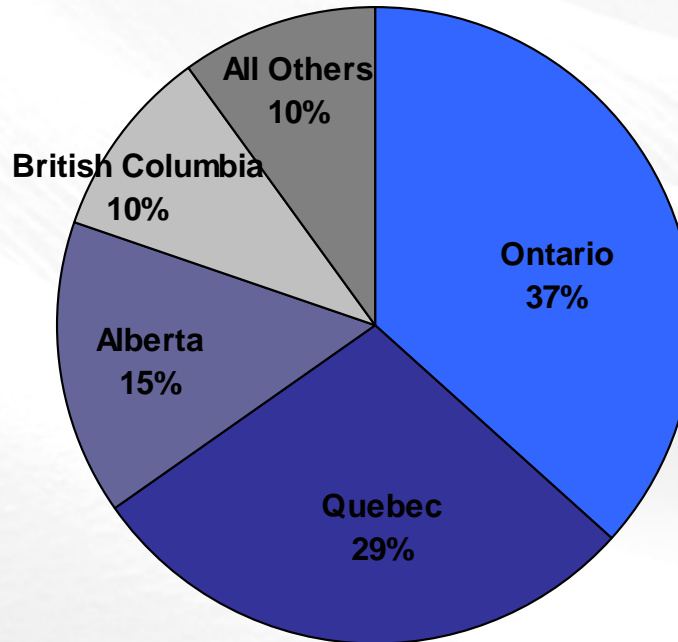
Location: U.S. Region



Q: In which specific state is your personal place of business located?
n=615 (Based on those located in the U.S.)

Ontario is the main province of Canadian respondents (37%). Quebec follows at 29%. Alberta (15%) and British Columbia (10%) trail.

Location: Canadian Province

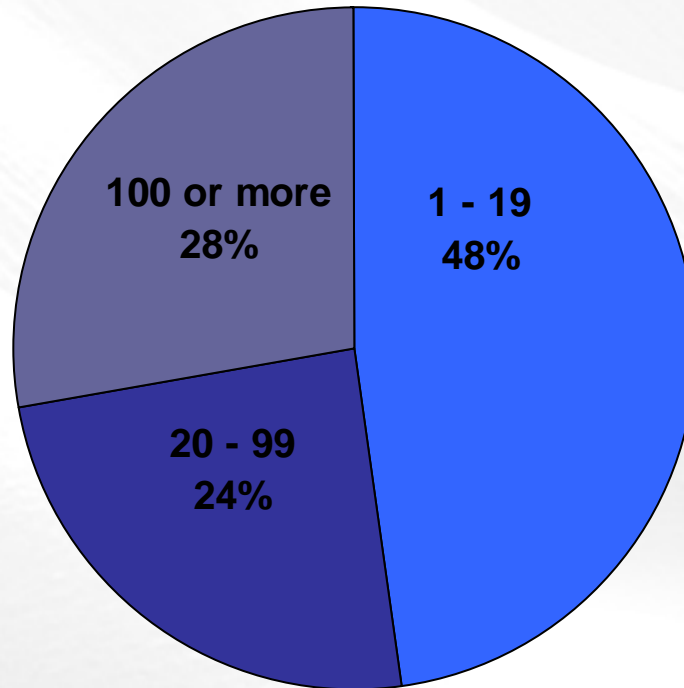


Q: In which Canadian province is your personal place of business located?

n=41 (Based on those located in Canada)

On average respondent firms employ 57 individuals. Forty-eight percent have 1 – 19 employees. Comparatively, 28% have 100 or more on staff.

Number of Employees



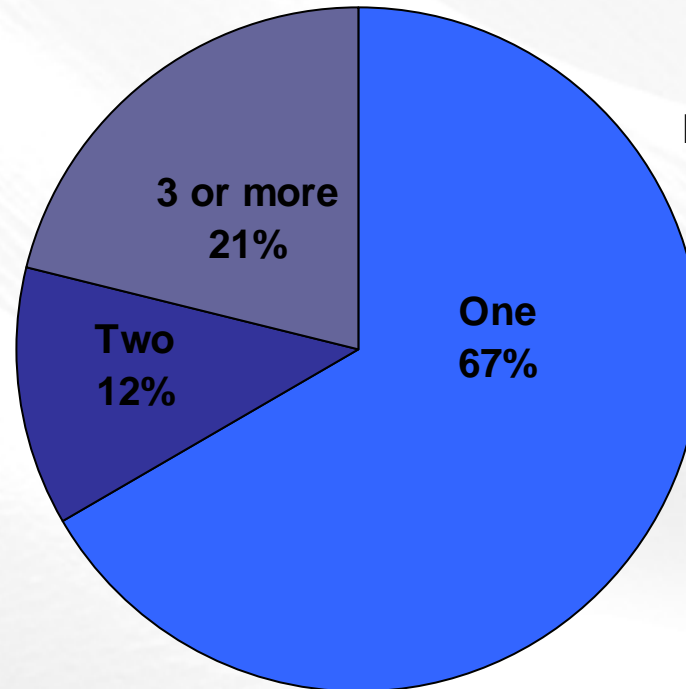
Mean = 57
Median = 24

Q: How many, including you, are currently employed at your operation?
If your company has multiple locations, please select the number of employees at all locations combined.

n=701

The majority of respondents have a single location. However, more than one out of five have three or more locations. The mean number of locations is 3.2.

Number of Locations



Mean = 3.2
Median = 7.5

Q: How many operating locations does your company have currently?

n=701



Appendix A: **VERBATIM COMMENTS**



Q.1: What is the primary product your company manufactures?

3931 pianos.

Abrasive grain.

(3) Abrasives.

Aircraft parts.

Aircraft.

Archery equipment.

Architectural prototypes.

Architectural scale models.

Automation systems.

Ball bearing slides.

Baseball bats.

Blinds (all kind) and hardware.

Brush handles.

Building material distributor.

Business aircraft.

Catalog resale.

Coatings distributor.

Contract seating-pews.

Crates.

Custom auto interiors.

Custom built homes.

Custom interior wood shutters.

Decorative accessories.

Ductwork.

Education (high school).

(2) Education.

Educational/team building products.

Engineered lumber.

Exporter not manufacturer.

Exterior siding and interior paneling.

Financial services.

Furniture care and touch-up products.

General woodwork.

Gifts and woodturned objects.

Gunstocks.

Hardware.

Hardwood plywood.

Hobbyist.

Home repair.

Hospitality: hotel/motel and health care.

Hotel/motel.

Industrial wood crating.
Institutional cabinets.
Institutional casegoods.
Interior shutters.
Kids toys.
Laboratory cabinets.
Laser-engraved products.
Lathe turned objects.
Log homes.
Loudspeakers.
Lumber supplier.
Luxury yacht interiors.
Manufacture wood pallets.
MDF boards and HPL.
Mold/model making.
Musical instruments.
Musical.
OSB siding.
PB and MDF boards.
Plastic fabrication.
Plastic laminate casework.
Plastics.
Plywood & MDF.
Plywood.
Portable sawmill and various types of equipment.
Press plates.
Profile laminated components.
Provide financing.
PVC edgebanding.
Reconstituted veneers.
Refinishing.
Repair services.
Resaler.
Residential stairway installation.
Restore antiques.
Retail.
Retailer of woodworking supplies.
Retailer.
(2) Sales.
Saw blades.
Sculpture.
Sharpen tooling.
Sharpening service.

(3) Signage.

Slot machine stands.

Software.

Speaker cabinets.

Speakers .

Stain/finishes for wood.

Structural.

Technical training, post-secondary.

Toys and related items.

Turned wood game calls.

University.

Veneer.

Window coverings (blinds).

Wine/whiskey barrels.

Wood adhesives.

Wood crating.

Wood panels.

Wood veneer.

Wood wallcoverings.

Woodworking equipment.

Woodworking hobby/furniture and gifts.

Q.2: Please indicate the main geographic location of the office/plant where you work. (Other)

Argentina

(2) Barbados, West Indies

Bermuda

Chile

(6) Colombia

Ecuador

Europe and Brazil

Global

India

Israel

(2) Italy

Jordan

(10) Mexico

Mexico—also have facilities in Canada and USA

Ocotlan, Jalisco, Mexico

Portugal

Puerto Rico

Southeast

Sweden

(2) Taiwan

Trinidad

Trinidad and Tobago

(2) U.S. Virgin Islands

U.S./Canada/Europe

(2) Venezuela

Western U.S.

Q.6b: Can you elaborate on your expectation for your company's performance in Calendar 2008?

15% decline in sales, break even profitability.

15% increase in sales.

1st quarter sales are up 30% over 1st quarter last year.

1st year since 1999 we will not show an increase in sales.

2006 and 2007 were down years due to the downturn in housing starts. With new products expect to grow 10% in '08 over '07.

2007 was an adjustment year with many new employees that required additional training. We graduated from CAD to micrveluem (sic) and added software to our estimating process. Our income suffered due to two large, 1mm++ (sic) under-priced jobs that caused chaos in our production facility.

2007 was poor and 2008 will be 15% off again.

2008 expectations will be the same or lower than 2007 due to the U.S. economy, the housing market, and an election year.

2008 has started slow, but is steadily gaining in sales. We expect to meet or exceed 2007.

25% gain in business.

3,000,000 in sales is the goal.

40,000,000 sales.

5 - 10% growth.

5% - 7% growth.

80% sales growth by October.

A 15% increase on sales yearly and total quality control improvement for 2009.

A good bit depends on construction/housing market.

Ability to give customers quick delivery, custom options, and popular priced items.

About the same as 2006 and 2007.

According to our plans we should be getting more business starting this coming summer because our company is not only production, but we're also distributors of great fixture assembly components. We are working several projects that, if they turn, they should put us in good shape for this year.

Add new equipment, so as to become more productive.

After the election I hope building business will pick up. Hopefully there will be less fuel cost so people will have more money to remodel.

All related to the economy. We can do more but are struggling to get orders in. From what I have heard the lack of orders this year is down all over.

Already double YTD.

Already this year orders are up 132% over last year.

An increase over last year is expected based on the number of quotes.

Anticipate increased business both North America and overseas due to increased presence via Website and hiring of reps. Am bullish on US and Canadian economies.

Anticipate sales to be flat to down 12%.

Anticipate that our sales will be down by 20%.

Area is expanding and growing.

As a supplier to trailer manufacturers the volume of our business is driven by the transportation industry and with the trucking industry down our sales are directly effected.

As the housing market has gone down we have suffered the consequences. Compared to 2006 we are at 60% capacity as of this date.

At least double our existing sales since our sales have still a very low base.

At the end of the first quarter, we are 20% ahead of last year. We anticipate the 20% increase to continue for the year.

At the present time we have a year's worth of work under contract and are looking forward to the next 3 years with clients waiting on us.

Attention to detail.

Bad economy, bad television reporting telling us that the sky is falling. Housing has slowed dramatically in my area, and more and more giant housing companies are building here. These companies don't use the local cabinet makers. Also, illegal aliens are killing the value of our work.

Barring a sudden downturn in incoming sales, this year should surpass the previous year's annual income profits.

Based on 1st Quarter, I would guess if no dramatic changes take place to change present economic conditions, our business will be down 10% to 15% this year (2008) compared to 2007.

Based on our attendance for 2008, we will be looking to expand the cupboard-making section of our business, as more people are making inquiries in that sector. The aim is to provide cost-effective cupboards that are practical.

Based on year to date, have 30% more business booked.

Be at the same growth level (10%) as 2007.

Because of the current housing market our product has declined by 50% in the past 8 months.

Because our clients are in the top 5% income bracket we are generally insulated from economic downturns. However, I am tentative about the future and feel we need more advanced equipment in order keep up.

Behind in orders so far.

Better advertising.

Better industry outlook for '08. Have large extended job for better part of year.

Better product offerings and more streamlined and efficient manufacturing processes.

Better than 2007, in a perfect world.

Better.

Building two new homes and smaller renovations.

Business has been about the same, many are repeat customers.

Business has slowed.

Business is off about 10%. We are reorganizing to take advantage of new technologies--software.

Business is slow.

Business is slowing and money is tight in our market.

Business is strong but short term.

Business looks like it will continue to stay at the level it has been for the last year. We have a good start so far.

Business seems to be picking up. Larger orders and facilities.

Business should be steady as building is good in our area.

Business was poor last year and this year doesn't seem to be any better if not worse. Overseas and the economy are killing the wood industry.

Busy with commercial casework.

By the end of the year we expect to see growth over 2007.

By utilizing new technology, we have increased the throughput of our plant, thus making us more competitive within our market segment.

Capitalized on a niche market.

Client base is solid and not tied into the home building industry for new construction, but for remodeling, which while not as strong as it could be, is more robust than the other markets currently. Go where the gold is.

Commercial box, custom high level shops, millwork and high end custom are all still busy.

Commercial work is keeping us in the black. Residential is near dead.

Company will enter old home purchase and do complete makeover which will include all cabinet work.

Compared to 2007, business is off 30-40%.

Continue as we have in the past.

Continued growing sales volume and continued ability to provide an excellent product in a timely manner.

Continued steady work and orders.

Convenience store market is good.

Could be a record year if the jobs come in at the right time, otherwise similar to last year with pricing from 3-1/2 years ago.

Custom furniture business in south Florida is still very hot.

Customers are busy with good backlog.

Cut lead times. Open show room. Streamline manufacturing process. Budget for marketing.

December 2007 we saw a sudden drop in orders. For 2008 orders are down 35% compared to 2007. Based on the housing foreclosure mess, I don't see my business increasing until early-mid 2009. I hope I am wrong!

Depends on gas prices.

Depressed pricing due to over supply in a down housing market.

Diversified into moldings and millwork.

Doesn't look good.

Downturn in economy has hurt every facet of business.

Downturn in the economy--specifically homebuilding.

Due to credit tightening, we anticipate fewer companies qualifying for financing.

Due to economic situation in USA markets, Mexican economy suffers by direct consequence. We expect to be in business same as 2007 which was a slow year for us, but looking for more specific niches in order to improve our profit margins. No matter what we have to differentiate from South Asia's niches otherwise we all will face even worse results.

Due to high insurance, property taxes, and flat construction economy, we should be able to maintain fair to good.

Due to housing market slowing, our projected sales will slow in comparison.

Due to the economic changes, I feel it could be a slow year. New England customers are in a holding pattern. I don't see any major capital equipment purchases at this time.

Due to the economic situation in the woodworking industry, just as good as we did in 2007 would be great.

Due to the national economy our customers are delaying some projects or not proceeding with them at this time.

Due to the nature of the economy, our in-house repairs at upper level resorts has fallen off sharply.

Due to the slower economy I do not see our 2008 financial year to be as good as 2007.

Early indications are that business will grow less this year than it has in the past.

Economic downturn.

Economic talk of slow downs and recession have many industries holding back.

Economy is down. Most of our work is residential and it is slow.

Economy is dragging down sales and demand.

Economy is hurting our business as in all other sectors.

Economy slowing down.

Economy.

European OEMs need automation support in the US. US industries with automated production machinery need support.

Even though the Canadian dollar has been almost par with the U.S. we still are winning our fair share of projects. Partly due to the fact that we have focused on the hospitality industry a little more verses institutional casework.

Excellent opportunities.....no shortage of opportunities.

Excellent.

Expect sales to be flat or down a bit. Educational market is the big question mark.

Expect sales to be lower than 2007, but on an upward trend for the year.

Export has not been hit as hard with the U.S. housing problem.

Fair, it's an election year, the housing industry is terrible and consumer confidence is low.

Feeling affects of housing market being down.

Fewer but larger jobs with more complexity.

Finalizing orders with Home Depot and Tractor Supply.

First quarter gross revenues were best ever.

First quarter of 2008 on par with 2007.

First quarter sales have doubled last year.

Flat sales with no growth and striving to maintain costs and margins.

Flat sales with no growth vs. last three years of 10% growth. New construction orders are the main reason. Remodeling seems fairly strong.

Florida economy is very bad which affects our business.

Florida market having problems.

From 2006 to 2007 our annual sales doubled. We expect the same or greater for 2008.

Fuel costs and market conditions will continue to have a negative impact.

Fuel prices and housing market aren't making it easy. Commercial projects will have to get us by.

Good U.S. dollar value negative impact only, volume good.

Guarded optimism based on a mild recession which ends in the third quarter.

Gut feel! Phones slowed down...unemployment is up, mood is cautious.

Have cut down on production as I am taking more time off for travel.

Have purchased new saws cutting production time in half.

Hire new people.

Hold our own.

Holding on until economy picks up.

Hopefully better than 2007.

Hopefully business will increase.

Hopefully by changing focus we can survive!

Housing downturn as well as economy hurt the flooring and molding industry.

Housing is down, so we expect to be 20% under 2007.

Housing market down which in turns affects furniture purchases, home improvements. Oil prices up - causing products increasing in price.

Housing slowdown and economic conditions will make the market more competitive.

Housing starts are down, it could be a slow year.

I already have more orders for 2008 than I can complete.

I am a residential contractor and business has slowed dramatically, so I expect 2008 to be a slower year. I hope I'm wrong!

I am adding a finishing operation to enhance current production and attract more clients.

I am dependent upon residential new construction. No construction and no work.

I am doing fewer jobs but better quality jobs.

I am not employed at Creative Millwork any more; I left and went to Stock Building and Supply and I am laid-off because they closed their door department.

Building is very slow in Florida right now, construction is down, and homes are plentiful.

I am not expecting a lot of volume this year. I plan to ride out the slowdown and position myself for the recovery.

I believe that we will have a good year for the most part. A lot will depend on the housing market and the economy.

I build cabinets, I'm booked 6-7 months out and I can be choosy about the jobs I take and the people I do work for. I am also getting the prices I need to earn a good living and build my business. At the moment I'm having an excellent year! Compare me to 90% of cabinet shops in the greater Atlanta metro. I'm also working closer to home, average commute 15 min. as opposed to 1.5 hrs in 07 so I'm home a lot more. I am a small company and I'm not making millions (yet) but I think being small with virtually no overhead has helped especially in this tight economy.

I expect great things for this company in 2008.

I expect sales to be up 20% over 2007.

I feel that 2008 is going to be a slow year. With gas prices soaring and a slow economy people will be spending less money.

I have a small company and I will do as much as I want for the year. I already have work lined up for over six months.

I have already landed a large contract and expect repeat business from the contract.

I have always worked in Naples FL with high-end builders where the money is. 10,000 sq. ft., \$20 million plus. I am now falling back on remodeling homes, private home owners, small wall units and furniture. It's a hard sell to homeowners who don't realize how much things cost.

I hope to maintain steady upward momentum in the harsh financial climate.

I only do custom work and have a steady backlog of work and steady group of repeat clients. All new business comes from referrals from my client base.

I see economic bad times all around me. The crash in the home building business has directly affected my business.

I think the outlook could be good, as I have an opportunity to land a large commercial job coming up soon.

If business will pick up we will do great.

If people aren't building, they're remodeling, so it's still business.

Improve the level of contract-business, US as well as America. Try to increase the business with few customers in high volume, instead of many customers with low levels. Increasing business in upholstery products.

Improved advertising.

In our area the new market housing is booming and we have established a very high reputation so business should exceed this year's income.

In spite of the recession we are moving into, business seems fairly strong right now. Part is due to new medical accounts and that is a strong market.

Increase contracts.

Increase in sales partially driven by the weak dollar.

Increase in sales.

Increase sales and expand into different markets.

Increased cost for raw materials, fuel cost for transportation, economic recession fears. Overall lower demand for our products.

Introducing new product to stimulate sales.

It all depends on the housing market. If it continues to be down so will we.

It is a slow year to this point and we do not see an upturn this year.

It is starting out slower than usual. Several of our customers have indicated they are scaling back this year. We supply complete booth/cabinet/prefinished trim packages for restaurants and hotels.

It is too soon to tell. The general economy will sway outcomes significantly. We have hired new sales reps that can have a positive impact on our business this year. We have some clients that are building new facilities this year.

It looks like it will be OK this year. Looks like it will be about like 2007.

It's starting out very slowly.

Judging from the number of quotes we have outstanding, I believe that if the commercial business continues the way it is and residential picks up a little, we should have a very good year.

Just a general downturn in sales.

Keep production at the same level even though we are expanding the facility and updating equipment for the rest of the calendar year. Sales are steady due to good word of mouth and we are selectively taking work due to the ongoing expansion.

Keep the customers we have.

Less demand, fewer homes being built by our builders.

Less production compared to other years due to subprime crisis.

Less revenues than last year. Profit will be less as well.

Lower sales due to the housing and mortgage slump. Closets are a luxury item and consumers are pulling back. Not to mention all the yahoos that got into the business last year and are lowering prices just to pay rent.

Lower sales volume.

Maintain sales and get our profit up.

Many new contacts and new ad distribution.

Many of our smaller customers are upgrading equipment for production savings.

March 08 sales best in history of company.

Market is a little down due to mortgage issues. Many of our customers are spec builders who have slowed considerably since the 4th Quarter of 2007. High-end custom business has been steady but also a little off from 2nd-3rd Quarters in 2007.

Marketing Law of Averages states that for every five happy customers you have, you will gain one new customer; however, for every one unhappy customer you have, you will lose five potential customers. We are breaking these marketing laws by gaining at least one new client from every customer. We attribute this success from providing a quality product and being honest with the clients. Moreover, we deliver what we promise.

Markets are good for us, we expect a top year.

May be taking company in a different direction such as manufacturing mostly with our CNC router and avoiding retail sales.

Mid-level housing slow will slow machinery sales. Will be concentrating more on commercial and high-end residential.

Moderate growth, expanded market share.

More aggressive sales and marketing to maintain past volume.

More commercial work, higher paying jobs, better machinery.

More customers and wider variety of products.

More customers are having furniture repaired and refinished.

More customers.

More sales for better quality.

More sales through the first quarter this year than last.

More stores and this means more store showcases.

More work coming in and better paying ones.

More work.

Moving into some new opportunities. Stagnant in current market.

My gross and net have increased consistently.

Need more orders for our main product.

Need sources to build structures that we can improve. Many still on drawing board.

New contacts of past few years are beginning to perform.

New customers.

New marketing program.

New products coming out each quarter, and 2 new areas of added business for us that we are in the process of developing.

Off to a very slow start. It's been difficult to close on jobs.

On schedule for 30% growth over 2007.

On the verge of expanding two lines and creating a new product with recycled material.

One phone call in the last month, from a price shopper. No new business on the books at all.

Ongoing government contracts with both USA and foreign customer base.

Optimistic. More commissions for entertainment centers and custom furniture.

Orders are just not coming in. People are not spending \$\$ when they do order something. Our sales so far this year are way behind 2007.

Orders may pick up towards the end of the year somewhat but we look for it to remain slow until after the election and into 2009.

Our business is tied to home remodeling and new home starts. If our area picks up we pick up as well.

Our business is up 25% this year due to losing competitors.

Our company experienced about 20% growth in 2007 and are ahead of that pace so far this year. Though we have seen changes in the market we are still busy. We hope to stay on this pace but it is requiring a great deal more effort.

Our concentration in the multi-unit portion of the industry has kept our sales growing in this market.

Our industrial will likely be about the same or slightly lower than last year, but our retail business is expected to grow about 6-10% (these are consumer items for furniture care and touch up).

Our industry has seen a severe slowdown over the last few months. We are not growing, but we aren't shrinking either. That makes our performance fair.

Our industry is directly affected by the new housing industry. We are experiencing stable sales but at a level around 20% less than 2007. We expect to bounce back on 2009 or 2010 when the market correction is completed. In the meantime we are aggressively pursuing the remodel industry with advertising and working with our dealers to have them grow in that area.

Our local market is growing at an even pace again.

Our performance will depend upon the housing market. If it goes up our performance will increase with it.

Our primary market is selling to builders of new homes.

Our product market in the industrial, commercial, and architectural door business is growing and our thick plywood markets are diversifying and looking for better quality markets to supply them and that is what we are all about--QUALITY!!!! We supply what they want -- and when they want it.

Our sales have regained momentum.

Outsourcing much of our fabrication while maintaining our face to the customer through sales, templating and installation being kept in-house.

Overall business in the bedroom furniture sector is expected to be flat at best and we are anticipating sales to further slide. Our major concern is the overall economy specifically the housing sector as well as inflation for consumers, especially the cost of oil-related products. There is also much concern with the value of the dollar against foreign currency.

P.O.'s and contracts are starting to come in from last year's bidding. We are hearing from even more that will be getting jobs soon.

Poooooooooor economy.

POOR economy, home building.

Poor to fair due to the downturn in the U.S. housing market coupled with high Canadian dollar.

Poor, low demand and prices.

Preliminary sales look good.

Produce additional items--marquetry/veneered tables and other items. Have added a laser engraver to cut the veneer.

Projecting \$10.5 million in total sales.

Questionable economic forecast might impact sales...?

Recession looming.

Recession proof niche.

Reduced construction in area.

Regular business is off 30% to 40%.

Relative to market conditions I expect us to perform well due to diversification and market segmentation.

Remaining in New Orleans (post-Katrina)--with minimal recovery--I do not possess much hope in terms of interesting work for 2008.

Remodeling is up in my area and remodels generally upgrade the cabinet used. I have had more inquiries in the last 6 weeks than I had all of last year. So far sales are well ahead of 2007, almost double for the comparable period.

Responses from direct mail advertising have fallen off thanks to the news media's constant hammering about a recession. That frightens the consumer into a false sense of insecurity. We do expect a pick-up this summer and fall.

Retail is down and that has a direct affect on my operation.

Revenue should equal or surpass record-breaking 2007.

Running at full capacity with all product sold.

Sales and profits are up.

Sales and service are our main areas.

Sales are down so performance expectations are low.

Sales are down...no production.

Sales are picking up and the forecast for Cinema cabinets is good.

Sales are steady, expect a slower market in 2008.

Sales are truly up and down like a Yo-Yo!!! In the mountains sales are somewhat better, on the plains things are not so good unless you're working for a customer in the mountains. High-end doing well, all other sectors are slow.

Sales are up 20% from 2006. We are going into ultra-high-end custom cabinetry and have started a job on an 18,000 sq ft house. We have 3 other jobs in queue and haven't even advertised. We are riding on our reputation in the display case business that is growing exponentially. This growth is due to quality, service, service and more service.

Sales are up almost 7% over the first 3 months.

Sales growth in excess of 10%. Original expectation was for growth in excess of 15%, so growth not as good as previously expected, but still very good.

Sales increase 15-25%.

Sales increase and new equipment installed.

Sales soft for 2007 and 2008; expect to see improvement in 2009.

Sales up 40%, plus adding new showroom.

Sales will increase, profits will increase due to increases in office efficiencies and material cost savings.

Sales will probably be level but profitability is tough.

Same as 2007.

Same as last year. Slight sales increase and still profitable.

Same as or stronger.

Shipments and incoming orders are better than 2007.

Should be about the same.

Should be same or lower due to economy slowing.

Since people are not paying for hand-crafted furniture like in the past, we hope to diversify into some other areas.

Since the beginning of 2008, we have had increasing interest in our custom home entryways.

Since we are an outsourcing company for the U.S. kitchen and bath manufacturers, and taking into consideration the '08 cabinet market situation, this year could represent an opportunity for us; however this year could be also pretty challenging if the markets continue depressed.

Slight growth in revenue; reasonable growth in profit.

Slight slow down at start of year. Economic slowdown?

Slow housing market.

Slow year.

Slower but still OK.

Slower sales.

Small business. I have a second job to support household needs.

Small one-man shop. Contract work. Don't sell aggressively, get work by word-of-mouth only.

So far our revenues are down compared to last year but I am optimistic.

So far this year it's been slow. As far as the rest of the year it is unpredictable.

So far, so good. I just want to operate and plan conservatively.

Southern Nevada and Utah markets are very slow at this time. Forecasts say it will remain slow for the remainder of '08.

Stated a 4-year project with long-time client.

Strong demand for high-end work.

Strong orders.

Survival.

Take a look at the economy. The market for one-of-a-kind hand-built furniture is not what it used to be.

The big mills are desperate, and are getting into the retail market.

The building starts are really down....so it has a huge affect on our production.

The Chinese flood our market using devalued currency and hack our defense computers. And people don't get this??? We are adjusting products and markets to step out of the way since our government is unlikely/unwilling to deal with the China issue at this point. Free trade doesn't take a 900-page agreement. It doesn't include dropping your currency to ensure market dominance. It's not nice when you hack our computers while trying to sell us counterfeited network devices with Manchurian Candidate code. Off soapbox - thanks...

The company is performing much better this year than last, but the economy is what will make or break the year.

The current mortgage crisis and the resultant downturn in new construction has greatly impacted our volume and mix of business. However, the remodeling and renovation clients have increased.

The downturn in the economy has us pricing more aggressively and chasing more custom projects.

The downturn in the economy helps unfinished furniture sales.

The economy is starting to grow again in our country and so we are having so far this year much more inquiries than in 2007, and even some orders, namely one machine from a U.S. supplier.

The economy is terrible right now. The housing/new construction market is such a large contributor to the success and growth of our business.

The economy is very flat currently, however we are making some gains that will build are market share.

The economy sucks, material prices are going up dramatically, competition is driving finished goods prices down. The near-term future doesn't look good.

The effects of the housing market/bank loan situation is affecting us as it is other cabinet manufacturers. We have not been hit as hard as most, but our business is down.

The first three months were not as good as last year. Hopefully, the next few months should pick up.

The Florida issues of overbuilt homes and condo's. Property tax and insurance issues.

The gaming industry is expecting an upturn over the next three years due to the introduction of new platforms and new technology requiring customers to purchase additional games.

The high-end custom market is as strong as ever. The detail level seems to be heightening as years go by. The more complicated a project gets, fewer companies compete for the job.

The high-end market for the houses which we provide doors for I believe will still be strong. We have a niche in this market and some very good wholesalers with which to get our product out.

The housing market collapse coupled with the economic depression will severely inhibit growth and profitability in all our operations.

The housing market has slowed severely, so our contractors and customers have decreased the number of homes being built. We are trying to make our way into the commercial side of construction.

The laboratory casework market has been receiving additional funding from the government.

The low- to mid-residential market is dead in our area, and every cabinet shop thinks that they can build furniture to compensate for the downturn in cabinets and countertops.

The market had slowed during 2007, but it appears that the tide may be swinging around. Plus I am offering different service now to help make my business survive.

The market is dead.

The media finally talked us into a recession in East Central GA. Our homes are selling if the buyers from up north and FL can sell their homes. Too much news media involvement.

The number of new houses being built in our area is holding steady and the work coming to us is steady as well.

The overall economy and the housing market have slowed our sales down considerably. We will survive the slowdown and seek other markets around the globe for our products, and use our global sales staff and warehouses to increase business in areas we do not currently serve.

The quality and quantity of commercial projects to bid on has been much better in 2008.

The recession in the US will affect us.

The same as calendar year 2007.

The slowing of the building industry has me concerned.

The Texas economy is still strong, and our business will reflect the local market.

The year is completely sold.

The year of 2007 was difficult for most cabinet companies. But with a new frameless line as well as some newer finishes we have developed, we believe that we will see an increase in sales in 2008.

There has been some consolidation and shakeout. Hopefully the competitive market will be a bit more rational.

They have decided to close this facility.

This is an upstart moulding shop. We hope to grow steady as we get new clients.

This is my third year in business in NC and I see signs of real growth for this year.

This province is still in a good cycle with billions of dollars allocated to projects that need to be started still. The outlook is very positive for the next 5 years. The moneys invested in the oilsands will filter through into other businesses and find their way into new projects again.

This year we expect to do pretty good due to many people opting to stay in their current house and remodel vs. move to a new location due to the housing slump.

Tied in to housing starts.

Tied to housing market.

Times are tough for many people--less cash flow.

To be the dominant provider for dust-free abrasives.

To continue to service the industry with integrity, with faith through our Lord and Savior Jesus Christ our one and only God.

To do a 5% increase from last year.

To exceed the previous year in total sales.

To make us the #1 sharpening service in New England.

Tough times but we will be doing as best we can!

Tough times in housing.

Try to keep the same inputs beside the price reductions in our local and natural markets.

Trying to keep our heads above water with good planning and a little luck to increase sales.

Unfortunately, we downsized last year. We went from a 110,000 sq. ft. facility down to a 60,000 sq. ft. facility, cut our delivery fleet by 2/3, cut our production staff in half. This was to lower overhead because the market share available has decreased at least as much over the past several years due to cheap imports from South America and China. So, by cutting our fixed costs and overhead, we don't have to have as big of a market share to make a profit.

Up 15-20%.

Up 33% over 2006.

Very slow sales.

Waiting for projects to be ready.

We are a building material wholesaler. While our business has made many gains in market share the past few months, the fact still remains that the building supply market is currently off about 28-30% nationwide. Any gains in sales in 2008 will need to come through increased market share.

We are a distributor of hardware. The housing market and media are taking a toll on the business.

We are about 15% down from last year and can't see any improvement in the next 6 months.

We are about to invest one hundred thousand US dollars in woodworking machinery and raw material for a door factory. If I come to the show I would like to visit such type of factory.

We are associated with a large kitchen door company with joint ownership interest. We expect 2008 to be rather sluggish but we are trying to operate as lean as possible and hopefully see a better business climate in late 2008 and into 2009.

We are currently running two shifts and have not yet experienced a slowdown in our high-end market.

We are directly connected with the housing market. So goes the housing market so goes our business.

We are directly tied to the new housing market, specifically high-end custom homes.

We are doing more advertising to reach more customers.

We are down 25% and we expect the same.

We are enjoying a very strong first quarter, our production is up 15%. I don't expect this increase to hold steady all year, but I do expect us to see a 5-7% production growth overall.

We are expanding our manufacturing plant to make more room for more machinery. We are bringing in more people to ramp up productivity.

We are expecting to increase our sales by 20% and to work at improving our gross margin by 3%.

We are experiencing some delays in getting orders from our customers. We feel that the uncertainty in the economy is going to have some negative effects on our sales this year and possibly in the future.

We are focusing on lean and flow, so even in a soft economy we are profitable.

We are going to have good profits, but the sales volume might be down. The economy as a whole is the driving force much like the rest of the manufacturing in the U.S. We are currently trying to expand into other regions of the Northeast and maybe do some value-added for window and door packages.

We are growing with our new CNC machine we purchased at 2006 show.

We are growing.

We are in a pattern to produce more this coming year than last year.

We are in a recession...Mississippi is the first to enter a recession and the last to recover.

We are in close proximity to double our 2007 output of last year.

We are introducing a new product line and we are expecting excellent results from that.

We are launching a higher-end product line which will hopefully get us more business in 2008. The economy is not great in Michigan.

We are looking at a 15-20% growth in sales for 2008 over 2007 and we have expanded into a new 250,000 sq. ft. building. Sales are up 35% to date over the same time last year.

We are looking to expand our product offerings now that we have some skilled employees. Our growth until now has been strictly word-o-mouth or referral.

With additional skilled help, we can begin to do some limited marketing. This should result in additional sales opportunities. Our goal is measured or deliberate growth for the next two years with plans to expand at a faster pace in years three and beyond.

We are making a new factory for kitchen cabinets.

We are off to a slower start than normal but it should get better the last half of the year.

We are seeing an increase in competition bidding so it is hard to say.

We are still turning business away. We do high-end custom work.

We are taking serious steps to become more lean, better service our customers and eliminate competition.

We are working hard to establish a larger share of the local market when the economy is down. Work will be harder to come by, but we are planning for the future now.

We are working on new products, as well as increasing manufacturing abilities. Aggressive in going after business.

We bought new machinery in 2006 that has increased our output each year since and are looking to research machinery this year to streamline our production even more.

We can do all the work and more.

We continue to be busy with banks, credit unions, churches, and doctor offices. Our jobs are custom and usually specified by architects. We build teller lines, tops, cabinets, etc.

We continue to broaden our project ideas and students are pushed to try new and innovative activities using industry trends.

We continue to remain busy and have a continuous stream of orders.

We did our best Christmas season in 14 years (since we bought our laser at the 1994 IWF), and the first quarter of '08 has been the best we have ever had for both new and old customers. We are hoping to add a new laser either before or during IWF this year. We have attended every IWF since '92 when both my wife and I attended cabinetmaking school.

We do custom work, scheduled in advance. 2008 firm commitments are a little above our five-year running average.

We do high-end custom work and are already four and half months out.

We do not expect any growth, but considering the market, we feel that if we maintain our sales close to 2007 that would be considered a good year.

We expect a 15-20% decrease due to slow housing starts. Remodeling still remains a bright spot.

We expect a 20% increase in volume.

We expect business to be good for 2008. Our first quarter was decent, but we anticipate good business as we diversify into additional product lines. We have aligned ourselves with very good manufacturers and have put a number of very good sales programs into place this past winter. Our customer base is diversified in many facets of building construction, to include residential, commercial, and industrial manufacturing, although our main customer base remains retail lumber yards and truss/wall panel plants, survivors in today's market.

We expect growth of 22%.

We expect it to be a good year. Although the U.S. market is poor, we are working new markets (China, South Africa, Europe), and demand in these is good, and we expect it to keep that way. We are also hoping for an upturn in the U.S. market towards the end of the year.

We expect it to be as per 2007.

We expect sales growth in 2008.

We expect sales to be off due to the slowdown in the housing industry.

We expect the economic downturn to have a negative impact on our bottom line in 2008. We believe that the large retailers will be less likely to go forward with new projects based on the condition of the economy.

We expect the local economy to be a little stronger in the second half of this year.

We expect the same level of business, and are looking for ways to improve the bottom line. We are seeking ways to improve efficiencies.

We expect to be flat to down in sales.

We expect to be up in sales volume but down in margin.

We expect to do about 30% more in sales in 2008 than in 2007. We've expanded our territory and hired more employees to meet the demand in our area.

We've also bought some equipment that should help with production.

We expect to do approximately \$2.5 million this year.

We expect to grow about 35% this year.

We expect to increase our sales and our performance with better production and yield in our factory.

We expect to introduce a new product.

We feel the economy pinch in some key markets -- SLC, Texas and Southern California.

We have a lot of new products this year.

We have a part-time business. With the housing market down, who knows what our performance will be. We are hoping for good results.

We have absorbed another business for more market share.

We have added new customers with growth in many markets!

We have always made a quality product. We do mainly high-end and the rich are still spending.

We have been hard hit by the downturn in housing. Hopefully that market has found the bottom and will start to improve later this year.

We have business booked through Sept.

We have consolidated plants and have taken waste out of our overall system.

We have done a lot of residential in the past. This is our first year to be AWI Certified and to bid lots of commercial jobs. It is just overwhelming the response that we have been given in our bids. Looking forward to a good year.

We have dramatically reduced volume due to the current housing situation. We have had 2 layoffs in the past 12 months. We do not see it truly turning around for about 18 more months. We are however, aggressively seeking new business and gaining market share.

We have gained new contractors who wish to purchase more of our company's wood components.

We have plans to actually expand this year into other parts of the country. Right now things are going as planned, but the unknown factor is the stability of the current economy. Regardless, at this point we look to increase sales by 15% this year.

We have seen some cutbacks from our primary customers, but not severe. There seems to be more competition than ever, both domestically and from imports.

We have several large projects that we will be doing during the year.

We have substantial good work lined up for this year.

We hope to complete a shop expansion this year. Then add some equipment to become more efficient and have quicker turn-around times. We are sure that this will result in higher gross sales this year.

We know the challenges that are out there for everyone, but our intention is to be more aggressive about helping our prospects get started this year verses waiting for a time when things are both more certain and costs are higher.

We look to do about the same amount of business as last year (which was our best to date).

We lost a major customer and are rebuilding.

We now have a website and are doing more outsource work for other companies with our CNC. We have a number of new accounts, both commercial and residential. We are also advertising more through the paper and organizations.

We plan on growing 25%.

We plan on streamlining production lines and increasing output.

We restore and sell antiques. The extra cash that people have to spend on discretionary items has tightened because of fuel and food price increases. The high-end items are still moving, but the low- to mid-price items have almost stopped completely.

We see our volume down by 50% due to the recent events in the housing market.

We supply very high quality material to very selective clients; thus, our business has been growing steadily.

We think the 2008 year will be the same as 2007.

We traditionally do well regardless of the economy trends.

We want to import higher quality products than before and add solid wood from the USA and Canada to our stocks.

We will be losing money.

We will be off approx 30% from last year due to the housing issue.

We will generate additional sales via the acquisition of additional product lines to supply in our area.

We will make budget at our location. That's as specific as I can be.

We would be satisfied with 2008 if we match 2007 numbers.

Weak economy in U.S. Offshore competition. Rising costs.

While the evening news tell of recession I believe that I will have an average year in terms of sales and production.

Will be better than the last years.

Will do as much work as I want to handle.

With current economy, more people are content to remodel rather than build new, which will be good for our high-end furniture business.

With equipment upgrades I may be able to increase the number of jobs that are in progress at one time and maybe some types of work that I'm not currently able to do will be possible. A new shop this summer will be a big help.

With the slowing of the housing market we expect that like now, in our market area it only seems to be affecting the spec market; custom homes seem to be holding steady. Therefore we hope to attain similar figures in our sales due to most of our work going to the custom-built home market.

With the word recession looming in the wind, our current customers have noticeably cut back on the amount of work for the first couple of quarters. But, on the other side of the coin, we have been very fortunate in securing several new, fairly large customers also so overall I feel we will be OK for 2008. Hoping for better things in 2009.

Work has slowed somewhat.

Working on a number of long-term worldwide contracts that will carry forward through 2008.

Working on larger projects.

Would be better if I could find qualified help.

Q.7: Which one of the following issues poses the single biggest obstacle to your company's success over the next 3 years? (Other)

A Democrat President and a Democrat Congress imposing more taxes, taking away any incentives for small business owners.

Access to credit.

All the above.

Canadian economy.

Cash flow.

Competition cutting prices.

Competition from others.

Congress.

Conservative + bad local taste.

Controlling growth.

Cost of steel and other raw materials.

Death of my wife.

Doubling/tripling production.

Establishing network.

Exchange rates.

Finding ethical suppliers, loyal customers and skilled employees.

Finding new customers.

Fuel surcharges.

Growth control.

Health insurance.

High rents, high fuel cost.

Imports.

Increasing fuel and raw materials prices.

Investment capital.

Lack of 'right sized' machines.

Legacy employees.

Local automotive based economy.

Loss of jobs in this area.

Manufacturing sector strength.

(2) Marketing.

Mostly Chinese imports and the lack of import laws controlling them.

My health.

My management abilities.

My time required for other non-related activities.

(4) None/nothing.

Not having enough capacity to produce all market demand.

Our government in a more general sense.

Price of wood.

Recruiting skilled automation engineers.

Resource management.

See previous comments.

Shipping costs.

State of technology.

Stupidity.

Supply of maple for billets.

The general economic slow down.

Time involved.

Time management.

Trained personnel.

Transportation cost.

TV media. If they would shut up about our economy, or tell the truth about it.

Q.7b: Why do you feel Government Regulations is the single biggest obstacle to your company's success over the next 3 years?

All the push for green products--we are going to start spray finishing.

Because government has always proven to be an obstacle over the years with regulations coming down from OSHA, IRS, EPA, and at least a half dozen other government founded regulators where the sole purpose seems to be to punish and control small businesses in the U.S., instead of helping them thrive and employ more people.

Because we have transition time in the environmental regulations.

Government regulations are costly changes.

Government regulations impact the entire economy currently in a negative way. Our businesses are over-taxed!

It is the main cause for all of the other obstacles you listed.

It is very costly for a small firm to conform to all the current government regulations.

Its where our funding comes from....Carl Perkins Act.

More rules. More regulations. More restrictions. I now have to pay for background checks and fingerprinting for every employee working on a school project.

North Carolina's state government is controlled by Democrats, and has been forever. There is no slowdown in sight in their appetite to tax and spend. Bush tax cuts went straight to NC taxes. Under Bush, who spends like a Democrat, government has continued to get larger, no end in sight. It appears that the electorate is content to have cradle-to-grave nanny government to remedy its every whim. This is in addition to OSHA, FAA inspectors, who have paid us a visit to audit our shipping log for any hazmat violations, ADA, etc. etc. etc. I could go on.

Over regulation is the overall cause of our nation's inability to compete globally.

Stupid regulations, lack of proficient employees.

Too much government interference in private business and private lives in general. Too many taxes with increases probable. Taxes suck up too much money that could be better used to create more jobs. If I have to shell out more to the government, that leaves less for me to invest in equipment and personnel.

Too much regulation.

We spend an inordinate amount of time complying with EPA, OSHA, in addition to state mandates.

Q.7b: Why do you feel Imported Wood Products is the single biggest obstacle to your company's success over the next 3 years?

At \$0.50 for a labor charge or greater we can't compete. Furniture made overseas has labor rates significantly less than \$0.50 per hour. Minimum wage is 11-12 times that without benefits. We can't compete and it will only get worse as China prospers.

Because I have government regulations and they don't!

Because products from China are too cheap and even with a low quality are competing.

Because the imported products from other countries, like China, are at very small prices. Sometimes seems to be dumping prices.

Cheap Chinese imports (low quality) but of unthinkable prices.

Cheap imports continue to lower the price expectations of consumers.

Cheap, low-quality products from China.

Cheaper, look the same, differences invisible to consumer. But real world quality is very different.

China does not compete on a level playing field with U.S.

China is destroying the U.S. economy.

Competition is good, but only when you are on the same playing field.

Competition is limited.

Customers come to us for mid to higher custom-made office furniture. Even though imports may be cheaper they are not as well built and the time delay would not be acceptable to our customers.

Customers losing business.

Direct competition low end.

Don't like having my business tied to China. Lack of environmental controls and fair labor policies. Would prefer to have products based from U.S.

We are currently finding ways for our business to reflect these concerns.

Final product from Asia. They shortcut the normal North American business.

Here in Mexico there's a lot of furniture from China and those products are cheaper than the Mexican furniture.

Homeowners and builders are able to obtain products that look very similar to ours at prices that we are not able to compete with due to labor and overhead costs.

Improving quality, lower costs, lowers value of standard U.S. made products. We must move further into niches that are harder to supply with imported products (custom designs, low volume products, etc.).

Inequitable trade laws coupled with low cost labor and raw materials from China has already made substantial inroads into the upholstery business and this will continue to expand.

It is just so tough to compete with countries that don't have to deal with government regulations (EPA, ADEM, OSHA, DOT, etc.). Most of the competition doesn't even recognize human rights, let alone workers' rights.

It's absolutely impossible to compete in pricing against those countries in Asia.

Keeping American saws running is not a priority for government officials or the heads of many furniture companies. They all sold us out in the 90's.

Low labor and production costs.

Low quality, cheap imports devalue the real market and cause a lower price expectation from the end user.

Lower cost of imports.

Lower quality, but much lower pricing.

Mass production and a lower cost.

Not being able to obtain the type of wood I need.

(3) Price.

The big shops like IKEA produce decent quality furniture at an extremely low price and it is hard to talk people into spending additional monies.

The cost of Chinese products is very low and today it's all about price.

The field is not level.

The prices are going up and the price is in U.S. dollars.

They produce a limited number of items but dominate the price market.

Too much cheap labor.

Unfair labor costs, compared to the cost of living in the U.S.

We are for both countries Canada and USA and can't keep business because new regulations from our government and accept everything overseas without any duties and full containers.

We supply do-it-yourself. DIY is dead because it's easier and cheaper to buy imports.

We use Baltic Birch a lot and it has been difficult to buy and the price has gone nuts.

With rising oil prices any imported products will be more expensive.

Q.7b: Why do you feel Recruiting/Retaining Skilled Woodworkers is the single biggest obstacle to your company's success over the next 3 years?

At our current growth rate we have not been able to find enough skilled labor to accommodate our increased production.

Because in order to get advantages over the rest, technology comes in first place, but when you have it, recruiting or retaining skilled people becomes an obstacle because there are always people needed to operate technology.

Because of the wrong politics from Mr. Chavez.

Because we do only custom kitchen work with a lot of glazing color. We can buy machinery to do this job.

Cannot find skilled woodworkers to train.

Can't find good, experienced, skilled, reliable help.

Competing with low-cost labor from abroad. Hard to pay good wages here and compete.

Cost of doing business is too high, therefore not being able to pay appropriate wages.

Current turnover numbers.

Difficult to hire and keep skilled workers.

Difficult to keep up with customer demands without them.

Even with advanced equipment our product is complex and must be interpreted and produced by skilled woodworkers.

Few candidates entering workforce.

Few young persons are thinking career, most are thinking job. They have been conditioned to move around in the job market instead of putting down roots.

Fewer people entering the blue collar workforce and a lack of discipline.

Finding the right people to fill the skilled jobs and retaining those employees has in the past been a major challenge for our company, and I expect that to continue to be a challenge.

Fools make waste.

General lack of young workers entering into woodworking as a career.

Getting highly motivated people and keeping them motivated is the key to success.

Good help is hard to find and retain.

Good people are hard to find and keep.

Had to find good employees.

Hard to build quality furniture without skilled woodworkers.

Hard to find good workers who are willing to work hard.

High-tech jobs are easier, have better working conditions and pay double.

I am speaking out of experience from the last 3 years. Recruitment has been an issue in that time period.

I am the largest exhibit house in Salt Lake City and this is a skill that is very new out here in the valley.

I have a hard time producing quality products on time when my work force makes too many mistakes. My ability to compete on pricing depends on customized quality work that can't be done by just any shop.

If we had more highly skilled good workers we would be doing excellent instead of good.

Implementing Lean Manufacturing requires skilled workers who can work in several areas. Those types of workers are hard to find. You can't just throw temps at a job. The skilled workers are more efficient than temps.

It is difficult to find skilled workers in our area. Also, wages for qualified workers are very high.

It is hard to find true craftsmen that understand the quality level expected on a \$100,000-plus kitchen.

It is harder to find good workers.

It is the largest off the books costs we have.

It is very difficult to find skilled people. And the number of new people you have to go through to find a keeper is very expensive.

It's getting harder to find multi-talented individuals who can be proficient in many media.

It's very hard to find someone to work and stay with the job at the wages I can afford to pay.

Labor is very hard to find in this area. I do think that with residential slowing down that the skilled workers will end up looking for jobs.

Lack of qualified help.

Limited skilled labor force in the area.

Low number in worker pool. Result of business location in rural area.

Many of the young applicants entering the workforce are unmotivated. With the current layoffs in other industries in our area many of the existing workforce are taking the time to explore other options.

Most trades do not attract people who can think. The better brains go on to college. Our business is much more technology-driven with computers and CNC machinery.

Nearly impossible to recruit good, experienced engineers, and keep them for any length of time.

Need for skilled employees is not always filled.

No one is learning my skills.

Nobody wants to work--they just want a paycheck and want to be able to come to work whenever they feel like it.

Not as much training being offered in craftsman-type skills.

Not enough craftsmen in the area. Hard to import them from 30-50 miles away.

Not enough room to bring in and train additional workers.

Not many skilled woodworkers are available in our job market that are not already employed.

Not so much skilled as responsible employees. I have hired many skilled employees, but their work ethic is pathetic.

Not sure how to be more specific on this... this business sucks for finding anyone. It's not just people with woodworking skills. I can't find anyone with integrity, honesty and a willingness to put in a good day or work without crying!

People are the key to success, they represent your company and can influence cost savings or expenditure on a daily basis

People do not want to work with their hands anymore.

People do not want to WORK, just push buttons.

Schools are eliminating their woodshop programs as budgets are diminishing. Even so, they do not teach skills that are valuable to fabricators such as myself. The few that come out of higher ed programs price themselves out of the market.

Skilled employees are the best asset a company can have. It's not the simplest task to obtain them.

Skilled labor is hard to find and keep.

Small labor pool in this area. Lack of emphasis of math and trade skills in the education system. Poor work ethic of most candidates.

The availability of people who want to work and can get to work and be a committed employee is very limited in our locale. Many of the manual labor workforce in this area have not seen or witnessed high-end housing or fixtures and therefore don't understand the quality that our company is trying to achieve.

The blue collar work force is dying, not many people want to start at the bottom and work their way up to learn a trade.

The company is growing very rapidly. We have 243 people in the cabinet shop now and forecasts have us hiring another 100 people in the next year. There are not enough skilled people here in this area.

The people we get walking through the door don't know anything about manufacturing or can't read a tape measure.

The rapid growth of our company in an area of the country where woodworking is not a prominent industry.

There are no trade schools teaching it. The last generation does not want to work.

There is a shortage of skilled workers in Trinidad and Tobago.

There just aren't the people out there with the proper skill set or desire.

They are not out there.

This issue seems to consistently be the issue that keeps us from being able to move beyond our expectations.

To be able to operate successfully the shop has to work like a machine, with specific people in place to carry the process to the next step without hesitation (marketing, sales, cutting, assembly, finishing, installation).

We strive to bring the best product to our clients.

When we recruit employees that have worked at other companies it is difficult to break bad work habits but once they are on board and see what a team effort we have they are good to go. Young people with no work experience and bad direction from previous generations is also a hard hurdle to conquer.

With the oil boom in central Canada many people are leaving home to work in the oil fields for big money. The remaining labor pool is scarce and those remaining home have higher wage expectations than in the past.

With the standards that we hold and what has been set down by the company president, it is a different working environment than most places. We live in a small community and the work force is a challenge for most companies, even more so if you are looking for skilled labor.

Without skilled help, we have no hope of meeting demand and expanding.

Woodworkers are a dying breed.

Young people are not exposed to the trades enough.

Younger people do not want to do physical or skilled labor. The work ethic has changed. No one wants to earn a living.

Q.7b: Why do you feel the U.S. Economy is the single biggest obstacle to your company's success over the next 3 years?

80% of what we manufacture is sold in the U.S. When their economy increases our sales will increase.

A downturn could lead to less travel/tourism which could delay plans to build hotels.

A poor U.S. economy, or the perception of a poor U.S. economy, could curtail renovation or new construction projects.

A soft economy impacts all my customers, residential (cabinets, doors, etc.) and office furniture and millwork.

A weak economy will make it difficult to continue our aggressive growth rates, which we are striving to achieve.

About 80% of our customers sell to the USA. The economy along with the dollar is a big issue for our customers.

Although we have found good pockets of construction, the general consensus among our dealers is that the economy has to improve in order for the year to be worthwhile. Too much negativity is not good, and it is hard to overcome that negativity every single day. We need some positive economic news. Most of our dealers are looking at the current economy as an opportunity to improve their standing in their respective markets.

Anything to do with the housing industry is down in our area. Tourism is also down due mostly to the gas prices. Our business has done very well because we do some unique products.

As an impact on consumer confidence and as a result, less \$ being spent by them.

As I mentioned earlier, some of the companies we do repetitive work with are scaling back. One has even shut down a few of its restaurants. Our number one finish vendor has mentioned that their business has tapered way off so I'm a little more concerned about it now.

As the economy slows projects are put on hold or scaled back.

As the economy slows the manufacturing base slows production and the need for abrasive products also shrinks.

As we are a manufacturer of cabinets used in remodeling, consumer confidence is very important.

Because I market to tax-paying U.S. citizens and our outlook isn't the best...

Because if people are losing their jobs they aren't buying new houses or remodeling them.

Because if the economy is bad or even looking like it is going to be bad people are hesitant to spend money if not necessary.

Because of competition with Southeast countries.

Because of the exchange rate COP/USD and the recession.

Because of the housing market.

Because people tend to spend less on high-end products.

Because the economy will affect our dollar, and how our customers will spend their money.

Because we are greatly dependent on the new construction of homes.

Because we deliver, and the payments are not received due to general contractors not being paid by the agencies or the owners due to lack of sales.

Between the weak dollar and the uncertainty of the presidential election, I expect to see a higher percentage of small businesses fail.

Businesses are afraid to spend money on upgrading their furniture.

Buying is down.

Capital goods are best placed in a stable market.

Caused a drop in demand for lumber. This is our biggest product with millwork and woodworking as a by-product.

Clients holding on to their money. Uncertain of future.

(2) Concern over the current presidential election results.

Consumer confidence and spending control. Expanding services which need office furniture.

Consumer confidence has to remain high in order for a business like ours to thrive. It is not the best scenario if people are sitting on their money because the government and the powerhouse companies of the U.S. are dictating what is happening on the stock market. The oil barrens are a sole reason the economy is in the tank. The housing market was bound to crash the way it did. Our products have traditionally gone into higher-end houses so the housing slump is not a main factor in our business. However the people with money are now sitting tight because the economy as a whole is down.

Consumer spending and rising fuel cost.

Consumer spending drives product sales.

Consumer spending.

Consumers must want to spend money. Fuel prices are at an all-time high and people are just trying to survive.

Cost of equipment, raw goods, tools are increasing. With taxes and gas prices on the rise, some customers cannot afford to purchase some of these products or services, especially from custom shops where the prices seem to be higher due to higher-end products. People want it quick and cheap. With the economic crunch going on, I believe this will become a strain on small shops.

Credit tightening, lack of capital, companies' fear of spending.

Current economic status affects all business owners and workers.

Custom woodwork and products will be in more demand with growth.

Customers are being very cautious about ordering products they need. They're also asking for lower prices more and more. Competition gets tough because customers are hunting for better pricing.

Customers not spending because they are not sure what is going to happen with the economy/jobs.

Customers not sure of future economy.

Decrease in loans for homeowners/equity in homes for remodeling projects and new home sales...nothing new.

Depending on what happens in the presidential election, we could see a big turn for the worst or better. When the stock market is down more people tend to put their money into their homes. However, if the housing market remains down, people may not want to invest in their homes until it picks up for fear of losing their investment.

Discretionary income is not available.

Disposable income dictates second home sales and vacation homes. When you have to spend most of your disposable income buying gas and essentials, how can you buy a second or vacation home?

Disposable income.

Dollar devaluation; high energy prices; poor response to environmental issues; wasteful government spending.

Due to the house credit problem, our business is all kind of blinds, if the people buy houses they will need blinds, that's why we depend on the U.S. economy.

Election year.

Everyone spending less.

Everyone thinks there is a recession and therefore make one.

Everything is costing more. People are spending less. Most people have less discretionary income available to spend on non-essential items.

For our business which is building new and replacement entryways with or without stained glass, the economy does play a role, but, when new construction slows down homeowners remodel/upgrade their existing home. We still might get their business if they are replacing their front door.

Now if everyone would quit doing any remodeling also, then it would hit us hard.

Fuel cost.

Funds.

Gas price, cost of living.

Gas prices high making a significant increase in operating cost.

Good times bring good sales...election year always has jacked up the economy, in my opinion.

Health insurance and workers comp overheads.

Housing is down. We have about 2-3 months inventory on the books and nothing is moving.

Housing starts are the biggest factor. These are secondary to interest rates and inflationary factors, including cost of fuel.

Housing starts.

Housing, R&R, etc. are all well below normal.

I deal with industrial accounts, when people are spending money, business is better.

I do not think the market for hand-built furniture will improve until people feel more confident about the economy and have the discretionary income to afford this type of furniture.

I don't think the economy will be bad. But, my customers are being told the economy will be bad.

I feel that if we have a serious round of inflation due to increasing oil prices, and our government doesn't curb spending, we could see a serious round of inflation. This could adversely affect long-term project margins.

I make \$5-12K rocking chairs for wealthy people.

If Congress cuts military spending budgets it has a direct impact on our company.

If it prevents customers from purchasing new machines, this could affect our growth.

If people don't build new stores then there is no need for our product.

If people don't have money, they won't buy houses.

If people lose their jobs, or hours worked are reduced, they will not buy our product.

If the economy maintains or picks up we will do okay. If the economy gets worse it may begin to affect our business.

If the overall amount of available business shrinks, it's tougher, but not impossible, to have sales growth.

If the overall economy is healthy then I feel the housing market will rebound.

If there is a recession in the U.S., there is a good chance we will be affected in Canada. We don't have the same exposure to sub-prime woes, but can only be hurt by a general U.S. slowdown.

If there is no building going on we cannot sell our products.

If there isn't an upturn in the U.S. economy, we could expect the other markets in which we are operating to get a bit crowded with other producers.

It could also be that a bad recession in the U.S. could drag other countries.

Inflation, taxes, regulations, lack of manufacturing, globalization.

It affects everything and the rate of exchange is going to be higher.

It affects the big picture. Store fixture business.

It controls everything that controls us.

It directly impacts disposable income.

It fuels our engine!

It may restrict travel to hotel/motel.

It's slow!

Lack of disposable income.

Lack of planning for the future and too many people trying to do too much too quick.

Last year toward the end of the year things started slowing down. So far this year same thing. Energy costs keep escalating and next year electric costs will be a big factor. So I feel it will take some time to rebound.

Less business and lower payback. Increased freight costs.

Less discretionary income.

Less disposable income will be available.

Less income, less spending.

Less money for clients to spend on items my company produces. Much higher level of competition based on price. More need to sell the concept of value.

Less money is being spent on new construction and the remodel market.

Less money to be spent on non-essential and luxury items.

Low reserve of money in economy.

Most of my business is from discretionary funds, and have and will limit customer willingness to buy.

Most of our exports are to U.S. and our products are used in the manufacture of household and office furniture.

My customers spend more money when their investments are producing good returns.

No disposable income.

No extra money to spend on hobbies.

No extra money.

No money for people to spend on non-necessity items.

Not sure of the cost of materials or other items we must purchase after bids have been awarded.

Office furniture buying normally slows down when the economy is weak, and that is exactly what we are experiencing now.

Office furniture follows the economy typically.

Office furniture is closely tied to the economy.

Offshore competition.

Our business is based on cabinet sales, and indicators point to consumer sales being weak.

Our business is economy-driven.

Our business is hard to predict but our success is somewhat related to the office furniture sector which fluctuates with the economy.

Our business levels are linked to the general economy.

Our clients contract us with budgeted marketing dollars. I can usually feel the effects of an overall downturn (any particular industry--or economy in general) as my client base crosses many industries. This in turn will downsize a project, or eliminate it entirely.

Our current product of office furniture has a history of following U.S. economic trends.

Our customer base, being in the retail market, relies a lot on how strong the economy is. Especially during the first couple of quarters each year.

Our customers are preoccupied with the success of their investments rather than purchasing durable goods.

Our customers are spending less per order, which is economy driven. With a better economy outlook, they tend to spend more on their woodworking hobby.

Our customers are the restaurant owners. If people need to cut back they do it by not going out as often.

Our lumber is used in the commercial real estate market and the high-end real estate market.

Our sales are to retail organizations and when they suffer from reduced sales it filters down the chain of suppliers.

Overall uncertainty by consumers may limit spending.

People are more cautious on spending.

People are more hesitant to spend than in the past.

People are not buying.

People are shopping longer before decisions are made; makes for slow-going.

People are spending too much money in order to simply stay alive, and do not have any money left over for furniture.

People aren't spending money.

People buy cheaper non-custom pieces when things are tight. Custom work takes a downturn.

People concentrate on need-to-have and not would-like-to-have.

People do not buy as much furniture during economic downturns.

People don't buy when they are worried.

People don't spend on these products when expendable income vanishes.

People have no spare money or are afraid to spend it which equates to no orders, hence no manufacturing.

People need \$ after they pay the bills and right now a lot of families do not have any extra \$ to buy furniture.

People need to feel comfortable before they will spend on items that are discretionary.

People need to have disposable income to buy my products.

People reduce the amount of money they spend on maintaining their house.

People will hold onto their funds, expecting to be squeezed by any entity that has the ability. Such as government and large corporations.

People with tight budgets don't build new houses or remodel existing ones.

Potential decrease in spending on custom furniture.

Price of commodities is being controlled by a handful of speculators, not on the real cost of supply and demand, and it will crash sooner or later.

Prices of all products keep going up and up. It is harder to make a profit.

(2) Recession.

Retail spending is reduced during bad economic conditions and new store openings as well as resets slow as a result.

Retailers appear to be cutting back in expansion in several segments of the market.

Sales are down.

Sales of other companies needing crates.

Sell to public schools which are all tax income based budgets.

Shipment of finished goods directly affects the need for new trailers.

Shortage of income and capital.

Slow housing in Colorado.

Slower economy--less work.

So many companies are moving their manufacturing offshore. Companies going out of business; used machines are plentiful on the market.

Stores will not spend as freely on new locations and will drag out the time before next remodel.

That drives who will spend and build, remodel, or grow and expand their homes and businesses.

The answer is obvious. When people have confidence in the economy they spend money. They have been told how bad things are for seven years. Now they are starting to believe it.

The cost of living is going up as well as cost of business.

The economic downturn will drive customers to be very conservative in moving anything other than proven methods forward. Additionally, cost pressure, due to the economy, will be tremendous, driving fewer dollars to the bottom line.

The economy affects all businesses.

The economy drives all buying.

The economy is in a shambles and the federal government is guilty of complete mismanagement!

The economy is not good, the purchasing power is lower. People tend to purchase used machines or spend money to fix old machines rather than purchase new ones. Therefore, our sales are decreasing.

The economy is reason #1 and the poor housing market is #1A. They both have negatively impacted our business on an equal level. If there is confidence in the economy people buy houses, restore the older ones and put additions on existing ones. The products they use for this are the products we sell. We need the economy to be strong with a strong housing market to continue to be successful.

The economy lacks confidence...as long as media people make their living driving stories. Media people should find positive things to report, pertaining to good things still being developed. Stop being so negative; we make our living in the construction industry.

The economy sucks.

The effects of the economy are hitting everyone in the pocket, limiting the amount that consumers are willing to spend.

The exchange rate hurt us.

The fed needs to stabilize the value of our dollar to compete with the world. Encourage investment.

The hospitality industry in South Florida has had a major slow down. The typical room rates have been lower than in previous years. They are cutting back on regular furniture maintenance.

The housing industry affects not only the cabinet sections but the balance of the home building business, floors, trim moulding, etc. We as a country will have to pay the piper in regard to the subprime mortgage mess that we are struggling through. It is a time for survival for a lot of small companies as well as for larger companies in our business.

The housing market is hampered by a sagging economy which is tied to the cost of the war. Consumers are nervous.

The housing market must get back on track for kitchen/bath cabinets to grow.

The items we sell are discretionary and if families are spending all their money on food and fuel they can't buy antiques.

The new president will be the only one able to fix this mess.

The overall health of the U.S. economy fuels most businesses, especially ours which is not need-based and can be delayed until family economics are better.

The politicians and bankers in this country have either made some very stupid decisions or some very intentionally devious positions to tank the U.S. economy. We as a nation are in debt over our heads, especially to countries like China and Saudi Arabia, who are NOT our friends. The dollar is being devalued, and we as a country have no leverage to change anything because we are in debt. There is a movement to make a North American union, and we are in an election cycle where the only choices available for a president are socialist. If any one of these sheisters gets in, the socialist-leaning Democratic-controlled House and Senate will raise taxes and in general make a lot of bad decisions against small businesses and consumers.

The population is unsure what funds it will take to survive and are saving where possible, limiting spending on household items such as furniture.

The single biggest obstacle to our company's success over the next 3 years is government \$\$\$\$ to keep things moving.

The slowdown in the housing market has hurt our sales the most and until the housing market picks back up our sales will suffer. However, we are branching out into new areas and implementing new processes and procedures to make the company more efficient.

The stability in the real estate market as well stock market with looming war--it all shows to be a little disturbing.

The U.S. is our biggest customer.

The U.S. is our biggest customer. If the economy is not doing well, then we aren't.

The value of the dollar is weak.

The weak dollar, inflation, lack of USA manufacturing, and the U.S. global position in general will eventually have an impact on most businesses. Even a small company like mine, which caters to the high-end residential market, could suffer if a recession gets bad.

The weak economy is affecting each one of the major markets that we sell into.

The weak U.S. dollar is hurting most.

This company depends on housing and RV manufacturing for its income.

This is because people are losing their jobs and they are spending more on necessities (e.g. gasoline). People do not have as much money to spend on high-end custom-made products.

Threat of universal healthcare has halted development of medical products by my medical manufacturing client base.

Tightening of the money supply.

U.S. economy is a catch-all. My business depends on several factors: the housing market (so many tradesmen out of work and they are undercutting my prices), workers here illegally (this hurts all American workers, U.S. dollars hemorrhaging across borders, taxes not paid to support benefit seekers, skills basic or non-existent, home owners and businesses forced to pay for poor workmanship, etc....).

U.S. mills are closing or downsizing and that will change the supply situation of lumber.

Until the media gets done telling everyone how poor the economy is, it will be the same. I believe that everything will be good after the election.

Until the subprime mess is straightened out, new home construction will be down.

We are a completely custom cabinet manufacturer who makes made-to-order cabinets. We can do this and keep our price point with that of the high-end cabinets at home centers, so they are a main competitor. Due to this and the economy people are opting for the "safer buy" that people associate with large companies; although this is not necessarily true. People feel that a large company, like Lowe's, that they do business with on a regular basis, is easier to trust with their harder-to-earn dollar.

We are a luxury item that people will scale back from during a slow economy.

We are controlled by the upper-end market of cabinetry in households that are effected by the economy.

We are in the building and construction chain.

We are tied to the retail industries such as high- and medium-end clothing retailers. If the malls aren't crowded with buying customers then our retail clients cut back on their expansion and remodel budgets which cuts our revenue considerably.

We as a nation are broke. (Headed down the toilet.)

We deal with upper-end customers and they need to feel they have comfortable spending capital. If their portfolio is weak they may pull back.

We depend on commercial construction and high-end housing. Both of these are tied to a robust economy.

We do millwork for retail stores and people are not buying, so our customers are cutting back on expansion plans.

We make retail products for middle-class consumers. A weak economy would reflect on sales.

We need better monetary times ahead.

We need to ensure that U.S. manufacturers have the ability to invest in automation in order to compete.

We need to invest in the U.S. Slow down the imports. Stop the foolish spending at the government level. Just a thought.

We rely on remodels to fill in the gaps between new construction. If the economy stays slow people will just live with what they have.

We sell close to 40% of our sales in USA.

We sell high-end furniture. The economy directly impacts our sales volume.

We simply must move away from an entitlement culture and realize that we compete on a global scale and not an inflated scale of wages and benefits. Taxes are way too high, and too great of a percentage of our people are dependent on a government tax dollar.

We supply most of our products to companies building finished products for commercial businesses verses residential businesses. These products are supplied all over the country.

We supply to several sectors. A slowing economy slows our business.

Weak housing market, higher gas prices, weak dollar versus euros.

Weakening of U.S. dollar currency.

When economy is good, people spend more money.

When the economy as a whole is down, construction spending is also down. For example, some of our business is in the banking sector and as a whole the banking industry is not expanding physical locations as much because profits are down.

When the economy is not providing jobs, the gas pumps are taking more and more of expendable income, and food prices continue to rise, I would say this is a direct reflection of economic conditions.

When the economy slows, customers hang on to the money they would spend for custom furniture.

When times are tough, companies cap or limit their marketing budgets. It doesn't loosen up until their revenues start to increase again.

With the weakening U.S. dollar being swallowed by the EURO it has driven machinery costs up over 35% in the last 6-8 months. The more the weaker U.S. dollar falls, the more the EURO goes up--freezing capital machine purchases.

Work is based on tax write-off incentives.

Worthless Republican policy!!!!

Q.7b: Why do you feel Weak Housing Market is the single biggest obstacle to your company's success over the next 3 years?

70% of past sales were to the residential housing market.

80% or better of the products we produce are used in new homes.

90% of my business is based on customers who supply the housing market, millwork manufacturers, kitchen cabinets, etc.

90% of my work comes from new builds. So far I'm staying busy as ever but I see a lot of builders struggling.

A goodly portion of our customers need to sell a home or property before they can move forward with their retirement home.

A large part of our business is tied to residential construction. Eventually the slowdown will affect sales.

A substantial portion of my most profitable work is tied to high-end architectural renovations. I do the extra added details that are the first to be cut.

Also with less mobility people order fewer custom pieces of furniture.

About 25-30% of our business is residential kitchens. We have had to up our minimum house price from \$750,000 to \$1,000,000 as this part of the market has not slowed as much.

All of my business is related to residential cabinetry and wood windows.

All of our major markets have declined significantly.

All the laminated components I make are used for furniture, kitchen cabinets and bathroom vanity cabinets.

As a major portion of the economy and a major employer of many of our retail customers the housing industry plays a major role in our business.

And as a home furnishing manufacturer new construction plays a role in our business as it relies on new home buyers furnishing their homes with new furniture.

As housing drops it affects the construction business which is a large part of our customer base.

As we are not exporters but importers our business is based on the domestic market so it depends almost 100% on it and it is still quite weak!

Because if the demand is very tight, the level of prices can be down.

Because of the frivolous loans that were given to people that could not afford them, and now we have to bail out the mortgage companies that gave the loans!!!!!!!!!!

Because our sales are to the housing market.

Because the biggest part of our business is building products.

Builders are a large part of our business.

Business is 100% new-construction driven.

Contraction of the industry.

Custom cabinet manufacturers make up a good part of our customer base.

Demand for wood products down, prices down, profits down.

Due to the fact that the Florida market was our biggest customer we have had to go out of state for other business.

Due to the rising fuel cost and other costs rising, people are afraid to spend on things that are not necessary. Remodeling is more of a want and not a needed item to a lot of my market.

Fewer furnishings.

Fewer housing starts means less demand for products that we produce.

Fewer jobs to bid.

Florida economy is based on the building trade. It will take at least 3 years to get better.

Hello, they're not building as much.

Historically we have always relied on new home building however we are looking at new product lines and remodeling.

Housing market is a key driver for the kitchen and bath industry.

Housing starts have a direct reflection on the amount of our product we sell and ship.

I am dependent upon new housing. With little new construction going on, I have little work.

If houses aren't being sold, it effects us.

If there are no houses, there are not kitchens and baths to install....

I'm a residential contractor. A down in the building market has a direct effect on my business. I am concentrating on the remodel market and I'm staying busy, but the projects are smaller.

In the past we have sold primarily to builders in our geographical location. The weak housing market has slowed the number of homes being built.

It is the biggest market that we serve.

It is the largest factor we have no control over.

It will slow down new home sales.

It's hard to sell cabinets when there aren't any houses being built to put them in.

It's obvious...read the paper, watch the news.

Large percentage of sales is in the mid-level cabinet makers.

Less business to go around, competition for business is greater.

Lost sales.

Low demand and low prices.

Many of our customers are residential home builders. When they are not building, our sales are down.

Many of our items are sold through retail channels and when the shoppers don't visit to spend, we lose sales.

Many of the employers we have standing relationships with are mainly involved in residential work.

Money troubles with foreclosures. Less money available for home improvement projects. Closets are still a luxury item for most people.

Most of our customers' core business is construction-oriented.

Most of our dealers are highly invested in new construction. We are working to help them put more of their focus in remodeling.

Most of our growth is in that area.

New construction and remodeling are down which directly affects our orders.

New construction is slow.

New housing starts are down and present homeowners not spending \$ on their own properties.

New housing starts reduce the amount of opportunities that you have to bid. Less opportunities, less business.

No sales.

No work if no homes are built.

Our 2 largest accounts are builders.

Our biggest product is architectural millwork and is greatly affected by the housing market.

Our business depends on residential construction. Fewer houses = lower sales and increased competition.

Our business is centered around the housing market. As goes the housing market, so goes our business.

Our business is directly related to housing and fewer starts mean less business.

Our business is mainly dependent on new home construction, some on remodeling.

Our company caters to the housing market.

Our company is focused on providing material for the housing market so if it weakens like it has been, no one will be purchasing our products because no one will be building.

Our company is tied heavily to the residential market.

Our company primarily did work with construction companies focused on new homes. This will make us transfer our focus elsewhere.

Our customers are dependent on a good housing market.

Our main market is new build multi-family construction.

Our product is focused directly on the housing market.

Our product is for the housing industry and if new housing starts are down we fall back on remodels but with the dollar being so unstable nobody wants to spend.

Our products are finishes for the construction, consumer and manufacturing areas. Prices are going up on our products. Consumers are spending money very cautiously.

People aren't spending like they used to. Scared of things to come.

People don't build houses, we don't sell our product.

People have less money to spend on luxury items.

People having slowed their buying of organization products.

Point blank, no housing being built for fear of recession means no work.

Projects indicate that it will be mid to end of 2010 before we see decent housing starts again.

Reduced overall demand coupled with reduced supply of raw materials.

Right now the market is slow for us.

Simply the largest factor of the choices.

Slow building.

Slow housing sales, slow door purchases.

Slowdown in housing starts puts less market for our product.

That and gas prices.

That is our market.

That's where our work is at.

The economy and gas prices.

The housing market drives the economy with a great deal of ancillary jobs--it's too broad to just say housing. Housing consists of so many trickle-down jobs--so until that market resumes some form of normalcy, we're all in for a rocky ride.

The only people in the cabinet business are shops that do work for \$2-million-dollar homes and up. GREED GREED wrecked the market.

There are not any houses being built here.

There is a large number of unsold new houses. A few of my builders have stopped building. Overall things look O.K.

This is my area of the market. Without new construction I have no business.

This is our main target of the market.

This is where we sell our product.

Until confidence in the economy is restored we cannot expect anything good.

We are dependent upon a strong housing market in a rural area.

We are directly impacted by the housing market. If the market turns around sooner than the second half of 2009 then we should see improvement in the overall business. If however the economy does not rebound then the domino effect occurs.

We are directly tied to new home sales.

We are integrated into a homebuilding company.

We are manufacturers of unfinished flooring and the housing market slowdown is having a major impact on our business. We do not enjoy much of the renovation business because our flooring is unfinished and the demand is much less than the supply at this time.

We build cabinets and the weak housing market directly affects us.

We build kitchen and bath cabinets. There is not a demand for new housing and several builders have gone out of business.

We cater to the new construction market.

We depend directly on the development of this important market.

We depend on new homes for the majority of our sales.

We do a lot of new construction jobs and if customers cannot sell their house at a profit, then they do not move into new developments.

We do a lot of new construction.

We do about 50% of our business in new construction.

We have put in equipment, personnel and systems to handle the growth, but with housing down we will only maintain current volume by adding new distributors.

We make components to sell to contractors. If the housing market is down, our products will not be in demand.

We manufacture housing products.

We manufacture stairs.

We manufacture upholstered furniture. A weak housing market means fewer buyers for our product.

We need new houses to put mouldings in.

We sell directly to home builders/owners.

We sell high-end English dovetail drawer boxes to cabinet makers.

We sell quite a bit to the residential housing segment.

We sell to builders who have no work.

We specialize in drywall sanding for new home construction.

We supply custom window coverings for houses so as the housing market fluctuates so does our business.

We supply mainly to new housing construction.

We were installing our custom cabinets for a contractor at about a rate of one set a week. Now this same contractor is wanting us to sell him factory cabinets because he doesn't have room in his budget for the custom cabinets.

We work with cabinet shops that do kitchen remodels. Their business is slowing due to home sale values decreasing--no more equity lines to do remodels.

We worry that the multi-unit part of the market will turn down just as the single family home portion has done. Also we worry about the strength of our customers.

When we finish going through this downturn, we believe there will be a much better opportunity for better margin orders and a larger market share for those left in the market.

With fewer houses being built right now the competition for those jobs is much greater. Over the last three years we stayed scheduled six months out and this year I am running only about a month. I primarily work for a group of builders and as they scale back so are all of the other builders in the area. That means all the shops in the area have gaps to be filled and there just isn't enough work to go around.

Without new houses being built, work can be difficult to come by.

Woodworkers are hesitant to buy software as many of them are not getting as much work as they used to and can't bear the expense.

Q.7b: Why do you feel ["other" from previous question] is the single biggest obstacle to your company's success over the next 3 years?

(Response to "other" for Q7)

My management abilities.	As a 3-man shop I still wear all of the hats and need to become better organized and learn to delegate more to take my company to the next level. \$200,000 plus sales per employee.
State of technology.	As we try to automate as much effort as we can, we realize that technology for our specific application is not there so we will have to create it.
Establishing network.	As without nothing moves.
Finding new customers.	Because I do not work with contractors as a primary source of new work.
Conservative + bad local taste.	Because most of our work is now local, we are at the mercy of our local clients. Post-Katrina attitudes favor resale value or a lack of commitment to spend more on quality.
Cost of steel and other raw materials.	Because of dramatic price increases.
Trained personnel.	Because we are a specialty contractor.
Imports.	Cannot compete with low prices. Some of my customers have relocated their operations outside the U.S.--thanks NAFTA!
Low retail sales (U.S. economy).	Consumer spending has direct effect on retail stores spending money to freshen up or add new stores. This is our customer.
My time required for other non-related activities.	Continue to be a full-time employee for another company. Also a member of service/non-profit organizations requiring a significant amount of my time to support their activities.
Health insurance.	Costs are out of control.
Fuel surcharges.	Customer has a hard time accepting this pass-through cost. Plus we might have slightly under-estimated fuel costs when projections were made.
Mostly Chinese imports and the lack of import laws controlling them.	Domestic manufacturers are trimming or closing manufacturing operations in favor of importing. This has led to decreased usage of our care items at the shop level. However, there is some spin-off from damaged finished goods entering the country along with sub-par quality items at the consumer level requiring the superior care products that we provide. Still, our core business of manufacturers is undergoing significant change from production to import.
Finding ethical suppliers, loyal customers and skilled employees.	Ethical suppliers: Those who BELIEVE And SUPPORT the concept of distribution, the value of distributors and the necessity of their profitability. Loyal customers: Customers that put cost ahead of price and recognize the value of having distributor knowledge and experience available. Skilled employees: Locating trainable or knowledgeable sales and technical people that will be stable and dedicated to the company long-term. These are the basics to success in distribution.
Time management.	Handling the workload without increasing cost.
Access to credit.	Hard to find a cheap credit.
High rents, high fuel costs.	Hurricanes in Florida since 2004 have increased rents 40%. My rent went from \$1125 (for 1500 sq ft) to \$1650 within 12 months. Base rent stays the same but CAM (common area maintenance) can be readjusted. Fuel cost means everything goes up! Suppliers are now charging an additional fuel surcharge for every trip, as much as \$25 for a freight value of \$400.
Doubling/tripling production.	I have been turning business away because we cannot meet the demand.
Controlling growth.	If growth is not controlled, one runs the risk of jeopardizing the very values--quality and on-time delivery--that a successful business is built upon.
Cash flow.	It always is most people pay us in 60 days, most vendors want to be paid in 30 to 45 days.
Loss of jobs in this area.	It is in the realm of poor economy. We had several major companies close operation in the last year due to outsourcing to foreign countries, as well as housing market crisis.
Not having enough capacity to produce all market demand.	It is real. Our customers demand more and more product and we are not able to produce it.
Investment capital.	It is the key to increasing sales, expanding markets and assisting in company financial stability.
Weak dollar.	It's both a negative and positive factor. Our exports out of South America are hurting but exports out of USA are good.
Transportation cost.	Large part of cost of goods sold.
Legacy employees.	Local labor laws make it difficult to terminate under-performing employees.
Competition from others.	Locally there are a number of low-cost shops trying to increase their share of the market.
Increasing fuel and raw materials prices.	Many of my suppliers are raising prices due to the increased costs they are encountering for delivery, shipping and petrol-based products. As the cost of goods sold increases, either profits drop or you are forced to increase your prices. There is a limit out there somewhere when clients will start saying no.
Resource management.	More opportunities than we are able to proactively launch.
Competition cutting prices.	My larger, more broad-based competition is taking market share with lower prices that are hard to turn down, even though shops may prefer to deal with us.

Shipping costs.	On some of my products it's 30% of the final cost.
Congress.	Read the news for yourself.
Canadian economy.	Same as the U.S.
See previous comments.	See previous comments regarding news media's exaggerations about the recession. These agenda-driven reports are responsible for consumers holding back spending. This too shall pass.
Our government in a more general sense.	So you want me on my soapbox again, eh? Government at ALL levels is the biggest combined influence presently. This ranges from renegade/rogue inspectors who raise havoc and cause stress to a medical level and who NEVER fear reprimand, to Federal policies that nearly ensure the death of entire domestic industries in the name of international cooperation. Whatever the hell THAT means. Or maybe it's just another Chinese lobbyist campaign donation...
Exchange rates.	The majority of our product is engineered and produced in Germany. The current exchange rates increase cost.
All of the above.	The mistakes of the present administration will have negative consequences for many years to come.
A Democrat president and a Democrat Congress imposing more taxes taking away any incentives for small business owners.	The more taxes I have to pay the less I can invest on new and more efficient machinery. Also the less I can pay my employees. One reaches a point where there's no reason to take risks and work hard if the government takes it all from you.
Price of wood.	The price is higher.
Recruiting skilled automation engineers.	The requirements are on high level.
Supply of maple for billets.	There are not as many loggers and sawmills out there that are willing to run the material we need due to exports to China.
Growth control.	We are a young company and are in the process of consolidating quality standards and operation and manufacturing processes. We have enough innovations and name in the market to keep growing at high rates for the next 3-5 years, so control is the key.
Lack of "right-sized" machines.	We are attempting to employ lean principles in our processes. Right-sized machines are crucial to the successful design and implementation of a lean work cell.
Marketing.	We have recently discovered that we are spending about twice as much as our peers per lead. We have to get better at attracting customers.
Marketing.	We need to consistently reach our target market.

Q.11: What types of machinery/equipment, if any, have you already bought in 2008 or are you planning to buy in 2008?

Advanced power handtools.

Battery chargers.

Clamp carrier.

CO2 laser.

Cold saw sharpening.

Computer.

Computers - software.

Delivery van

Edgebander, sliding table saw.

Extrusion lines.

Gaging.

(4) Grinding equipment./machinery.

Koch pocket bore/screw insertion machine.

(2) Laser engraver/cutter.

Laser printer.

Laser.

Lathe, jointer.

(2) Line borer.

MACT.

MDF press.

Orbital sander.

Passage door clamp.

Resaw.

RF generators.

(3) RF Gluer.

Rivet machine.

(2) Saw grinder

Saw stop.

Scanner and chopsaws, edge glue press.

Shaper bits.

Single end tenor.

Table saw.

Tenoning line.

(2) Tiger stop.

Treating plant.

Trucks and trailers.

Upholstery cutter.

Used machines for resale.

Veneer dryer, jointers, splicers.

Vertical saw.
Woodwaste boiler.

Q.13a: Please rate the value of each of the following industry resources for finding information about manufacturers of woodworking equipment during an equipment purchase process.

(3) Auctions.

(3) CMA membership.

Cold calls.

(4) Company/manufacturer reps

Contacts.

Delivery person.

Demonstrations.

Distributor knowledge.

EBay.

Equipment in other shops.

Factory technicians.

Harris directory.

In-house.

(2) Internal resources.

Internet forums & other businesses.

IWF catalogue.

Local stores.

(2) Magazine.

Mail-order catalogs.

Manufacturer knowledge.

Marketing.

(2) Networking.

(11) Other company.

(4) Past history/use.

Personal evaluation and service capability plus parts availability.

(9) Personal referral.

(2) Personal visit to manufacturers.

Personal.

Post office correspondence.

Process improvement.

Product samples.

(4) References from people who have the equipment.

Reputation.

Service

Sister companies.

Telephone.

(2) TV.

Used.

Visits.

(16) Word of mouth
Yellow pages.

Q.14: How, if at all, is your company responding to the "green" products movement?

ABS edgeband.

Apple ply & wheatboard.

As much as possible.

Buy local.

Coatings.

Customer supplied products to cut on our CNC.

Developing a green product.

Developing line of California-VOC compliant products.

Don't care at all.

Earth friendly insulation.

Exploring use.

Export SYP.

Following job specs.

Go-green program.

Green is a joke.

Green solid surface products.

Have perfected ABS materials for edgebanding.

I resurface and mill wood from old buildings and use them in my projects.

In the process of becoming ESP certified.

In transition.

Internal movement with employees.

ISO 14000.

ISO14001.

(3) Just getting started.

KCMA certification.

Marketing green products in retail stores etc.

Mill sustainable lumber some.

Mostly solid wood milled for me close to home.

My builders supply my wood products. I have no control over what they purchase.

No hazardous chemicals are used in my production.

No PVC products.

Not yet affected.

(2) Only when requested.

Our company pays to replant every tree that we use in a year's time.

PVC themal foil as finish.

(2) Reclaimed wood from barns etc.

Recyclable materials

Recycled wood.

Recycling programs.

(2) Recycling waste.

Researching.

RoHs compliant.

Seeking green products.

Solid surface.

The green team is working on it every day.

Tooling

Trying to go green.

Under review.

Use if available.

Use mostly green.

Using green manufacturing processes as much as possible.

Using lyptus on occasion but no other green products.

Using materials that encapsulate the release of formaldehyde.

Using only E1 standard.

Using wood from handled forest.

(2) UV finishing systems.

Waterborne finishing.

Water base primer and clear coat.

We have one local supplier of hardwood and I don't know what his certification is.

We have several products that we offer as green. We use linoleum and certified plywood.

We use some.

We use when it is convenience for us.

We've been green for a long time.

Whatever is locally available.

Working on certification.

Working on literature from vendors that are green.

Q.17: What new sales or production strategies, if any, has your company initiated to remain successful?

6 sigma / Lean and ISO 9100.

A new market strategy plan and market material.

A training program for our customers.

Added additional salesperson.

Added another location.

Added one person in production to give me more time for sales and customer service.

Added Strategist. Going full tilt at lean manufacturing.

Added two factory lines of cabinets diversifying: light commercial, remodeling, closets.

Adding company owned retail stores..

Adding value added steps to our product like custom finishing, installation better design services and new showroom.

Additional CNC carvers. Increase sales to Europe.

Adjust products to local customers needs.

(3) Advertising.

Aggressive cost control management and fine-tuning of bids.

Aggressive growth accompanied by a well established supply chain and significant preexisting market share. We provide a full range of products and services and are predominately sales orientated.

Aggressive marketing, introducing new products, certification for Environmental Stewardship (KCMA ESP), working on FSC Chain of Custody certification, pricing.

Aggressively seeking the market instead of sitting idly by waiting for the housing market to turn around.

Almost all of our panel processing is done with a CNC router with software to drive it.

Always calling on new accounts. Have picked up several new customers already this year.

Approaching remodelers.

As a relatively young company our focus still remains on networking within our community to make homeowners and contractors aware of what our company is capable of producing. We accomplish this through the local Chamber of Commerce, BNI and local team sponsorships (Little League).

Attention to detail.

Automate when possible and systematize our production station training.

Automation of process.

Be sure to work on existing relationships, don't take them for granted.

Begin to work in contract business (hotels) - Develop more upholstered references - Try to begin to explore the European market.

Beginning stages of implementing lean mfg.

Better customer service. Expanding targeted areas of marketing

Better tooling to generate quicker and better production.

Bi-monthly live CNC demo's.

Bought CNC router to improve production.

Branching out for the first time.

Brand recognition.

Broaden our manufacturing capabilities.

Brochure, new website.

Build a product that speaks for itself and your customers will speak of you.

By having one or two exclusive products make our clients to have us as an important supplier.

CNC router.

CNC.

Cold calling.

Commercial products - green products.

Commonality of substrates.

Concentrating on high end custom cabinet makers.

Consistently improving processes in house with lean manufacturing principles.

Contacts with architects and designers.

Continue to focus on equipment to improve quality and production.

Continued expanding shop capabilities.

Continuous emailings to our target market.

Continuous Improvement of technologies in mill.

Continuous improvement.

Continuously looking at new product development.

Control costs.

Cooperation.

Cost is King! Any strategies that will drive manufacturing/assembly cost down are being examined. As most of the large retailers go to online bidding for their store fixtures we have to reduce manufacturing cost to remain competitive.

Cost reduction, Quality of our products, guarantee and excellent raw materials.

Cross training among all of our sales group.

Custom manufacturing.

Customer driven manufacturing.

Customer purchasing database.

Customer service is our number one goal.

Cut down on the amount of people employed and use more technology. Target the existing customers and providing for their needs.

Cut prices to move old inventory.

Depend entirely on word-of-mouth and referrals.

Depending on more and evolving automation in production.

Develop a new distribution channel specifically in the entire United States.

Developing products to consume our own manufacturing capacity versus procurement of these products.

Differentiated products.

Direct mail.

Direct sales to corporate entities, Hospitality specifically.

Distribution outlets.

Diversification into flooring market.

Diversified during last 5 years to maintain sales levels.

Diversified into mouldings and millwork.

Diversify our product lines and the wood species.

Diversify our sales portfolio. i.e.: remodels, dealers etc.

Diversify product line, cut labor, lower inventory, and faster lead times.

(2) Diversify.

Do not need already have repeat and established reputation.

Doing more commercial jobs.

Due to implementing CNC equipment over the last couple years we have lowered pricing 5%.

Effective use of resources.

Eliminating poor performing SKU's, purchasing equipment to eliminate labor, tracking product flow, reducing waste by outsourcing dimension lumber on poor yield items.

E-Mails, Fax Outs.

Ever expanding presence. Better Business Bureau. More advertising. Hire help.

Expand the market area we service with value added products.

Expanded our product offering.

Expanding our territories, and incentive programs to our existing dealers.

Expanding what kind of cabinets are available.

Finish.

Get specified by architects that will defend your specs.

Give good service. Be dependable. Give fair price.

(2) Green products.

Greenguard certification.

Hand made products with the best quality and effort put into product. This has given me referrals for the next job.

Have hired a business coach.

Have not implemented new strategies.

High end, upgrade and remodel projects.

Higher quality brochures. More direct contact.

Highest quality materials and workmanship..

Holding the same.

Honesty in pricing, service, and delivery.

demonstrate my craft.

I have joined the local Chamber of Commerce.

I haven't stooped to begging yet, but it's not out of the question. I have given incentives to promote purchasing from me and I have tried to introduce quality CNC built cabinets to the local market. The local market is flooded with cabinets being made on site by trim carpenters. Nothing is straight.

Implementation of a paint booth for finish products.

Implemented a sales division.

Implemented a website.

Implemented shorter turn-around time on order filling and a can do anything for the customer philosophy.

Implementing better scheduling and improved product flow.

Improved customer service/custom finishes.

Increase quality, deliver faster, add capacities.

Increased our networking within the immediate community.

Increased productivity. Look for more Canadian customers.

Increased sales force and training.

Increased sales team.

Increased showroom space to 120,000 sq. ft. Drawing a lot more people Diversified markets.

Increasing quality of produce with the least down time during scheduled shifts.

In-house art department produces valuable sales literature.

Installed KVAL door assemble equipment, Kaesar compressor, and dust collection equipment within the last 12 months.

Installed new automated case clamp and also took delivery of a Skipper from Biesse to double our manufacturing capacity for panel processing.

Internet marketing.

Internet website .

Internet.

Introducing a new contemporary line.

Investigating other global market places.

JIT, we no longer warehouse product to let it just sit still.

Joined the chamber of commerce and volunteered time and shop space for nonprofit organizations

Kaisan, Kanban, lean.

Keep it simple, direct and concentrate on the details.

Know your customer.

Larger work area with more automated equipment.

Lean and just in time.

Lean concepts.

Lean manufacturing and fewer sales people.

Lean manufacturing and shifting toward the contract furniture market.

(2) Lean manufacturing.

Lean mfg and development of products to help sales combat with a weaker economy.

Lean principles (learned during years in automotive industry).

Lean training and certification for each employee.

Lean, Kanban.

Local neighborhood newsletters.

Look for better resources.

Look to different markets that are still strong, i.e.. commercial fixtures..

Looking into innovative wood preservation systems to use as a marketing advantage.

Looking into the apartment construction side of this industry.

Low overhead.

Low profit margin. American public is CHEAP and has no \$\$\$\$\$\$.

Made to order furniture through the use of lean methods FSC Certification Acquisition of Frank Lloyd Wright Design License.

Maintain quality at an extremely high level.

Maintaining excellent word-of-mouth.

Manufacturer direct supply and install hardwood flooring.

Market and sell the concept of value. Cater more to the individual client's needs - make the item as custom as possible, while maintaining production processes to maximize efficiencies and maintain economy of scale as much as possible.

Market segmentation in the sales department.

Marketing approach directly with customers.

Marketing in local magazines. Purchasing better finishing equipment (Kremlin airless air assist) and face assembly equipment (Krep air pocket hole drill foreman I think).

Marketing.

May start using an outside sales rep.

Medal parts with wood.

More & better machines to replace time consuming labor tasks.

More actively seeking remodeling business.

More complex CNC produced graphics/carving, via new software. New material handling with bridge crane/vacuum lift. Changed finishing process/products to reduce labor. Added a new dedicated shaper for repeated operations. Replaced edgebander with one that has contour corner rounding to reduce labor.

More custom work to offset offshore mass production. More customer interface, less long distance travel.

More direct marketing to home owners and builders.

More direct visits to our customers, rather than relying on furniture shows.

More outside salespersons & Internet.

More phone contacts and direct mailings.

More word of mouth from satisfied customers.

Most of our sales are through the Internet. We ship entryways throughout the United States. Keeping the Website operational and up to date is critical.

Move our operation to a larger plant going after more remodel and existing homes by using dealers.

Moved to housing remodeling instead of new housing.

Moving from dealer installation to big box retail sales.

Moving into new territories with new sale force and making ourselves known.

New brochure and website.

New innovations.

New marketing program, idea generation & action using Eureka Ranch methods.

New product lines, Lean Manufacturing, and an overall face lift of the company.

New products, improved quality, on-time ship.

(3) New products/product lines.

New website and recent addition of CNC machine.

New website.

None at the moment. Internet sales will be here soon, I hope.

None on the most part - not selling at this time. Pre market activities through donations through non profit organizations etc. to build network.

None yet this year, still using word of mouth.

None, use word of mouth.

Nothing new at this time just building on current strategy.

Nothing new except for the FSC strategies that will keep our overseas business going.

Nothing new, mainly fair business practices and good ole word of mouth.

Offer the latest technology possible to our customers, thus helping them to be more successful, helps us to be more successful.

Offering free displays to area retailers who have interest and potential to sell our products. (Expanding into the wholesale market.)

Offering modular installation.

Online quotes were added last year.

Only word of mouth.

Open 2 new showrooms in 2008 with a new and fresh image, new logo, designs on the cabinets with European tendencies... ..and reinforce the production and installation departments in order to give a good service to the increased sales.

Open our own retail stores.

Opened a second showroom, Direct sales to builders including new product lines. Added factory cabinet lines in addition to our own custom line.

Operating heavily on referrals.

Our sales are all either repeat business, referral or request to bid. We are a just in time manufacturer with deeply embedded systems so that we are not reinventing the wheel with each project.

Outsourcing.

Owners have more time to develop clients with face to face meetings as a result of engineering improvements. No other strategies have been implemented.

Past customer contact and referrals

PEOPLE -- PLYWOOD -- PERFORMANCE / This says it all.

Planning to use the internet to showcase products.

Presentation software.

Producing a high quality product all the time, having integrity and honest with all our clients.

Producing a production line of yachts rather than custom.

Production strategy: Constantly working on bettering our production line. Better quality, better training. We outsource work from our Custom Dept. to the production line to improve profits. Cutting out most of the overtime by better utilizing workers in other departments = cross-training.

Production: Small diverse cross trained work force able to move to different production lines as demand moves. Designing new competitive products. Vertical integrate machinery vs. outsourcing. Sales: Scatter gun approach to sales, first come first serve, vs. wasting months targeting specific retailers in order not to over sale capacity.

Promotions in the min stores as Lowe's, Home Depot and JC Penney as well as installed saw blades in the store to cut to size depends on the customer needs.

Provide JIT supply to selected customers.

Pushing for higher sales, shorter production time.

Pushing specific product lines.

Putting out new literature.

Quality and on time delivery makes word of mouth our sales tool.

Quality is number one.

Quality, quality, quality and personal service.

Quarterly postcards.

Quick and reliable service. carrying the right products.

Really stressed our ISO Certification, our lean manufacturing principals, and our green initiative. We have implemented a Carolina Cabinet Green Team to help us keep in front of the green curve if at all possible.

Recovering waste materials equipments such as pellets and briquettes.

Reduce profit.

Renaming and redesign of franchise stores.

Re-tooled the sales team. Build to order instead of warehousing finished goods. Utilizing common carriers for delivering LTL orders. Streamlined our product line. Re-structured our pricing.

Sales - Organization of structured Sales Models for all sales personnel to follow regularly. Less e-mail contacts, more phone calls and more personal contacts. Relationship building. Production - Additional training on equipment; running 'lean manufacturing' programs, albeit infancy stages.

Sales engineering lean manufacturing.

Sales of imported cabinets and pre-fab granite.

Sales strategies: perfecting the development of ABS as an alternative to PVC e/banding in an effort to bring green choices to manufacturers.

Target-marketing companies to approach to sell this to. Formulation of samples, literature etc for this compound. Institution of an Express program to cater to those who only wish to buy limited quantities of our product instead of minimum order quantities. Expansion of sales force both domestically and overseas to broaden our world-wide marketplace.

Sales Strategy - Architectural Program, whereby we provide combined AIA Learning Units along with our company's product review.

Sales training to key associates. More personal contact with current customers. Combine jobs, more cross training, making smaller lots

Searching for new customers, considering a variation in products, considering an entirely new wood-related business.

Shorten delivery time 66% less than average. The largest variety of finishes in the continent for RTF doors (65) All orders come 100%paid in advance. The most innoviative offer of the continent in European style door models (6O options plus accessories).

Shorten delivery time.

Shorter lead time - on-time delivery.

Showcase of new homes.

Some concepts of lean manufacturing/sales, aggressive sales strategies, pushing the envelope looking for ways to succeed and out work the competition.

Some newspaper ads, but mostly reputation.

Strategic alliances.

Strategic marketing and target mailing.

Strategic measures are to maintain a quality product with a standard that is high end with a moderate price point.

Streamlining inventoried products to make room for new products.

Strong customer service and producing a finished product to a standard higher then what was expected. Word of mouth carries this 2 man shop.

Stronger website.

Structured payment plans.

Superior presentations, follow-up with financial docs.

Take from competition.

The green movement has been very big for us.

Through marketing, we are actively educating architects and designers to the fact that we are a high capacity regional manufacturer - not a shop.

To do more internal wood machining operations.

TOC....Theory of Constraints.

Training for salespeople to generate their own leads.

Up to this point we have been successful with word-of-mouth. We now see the need for direct mail pieces that introduce and showcase our offerings.

Updating catalogue and website.

Upgraded product offerings, implemented lean concepts.

Using pull through marketing, contacting more end users.

Visit local houses under construction.

Visiting expos outside of the normal industry to obtain more exposure.

We are a small word of mouth organization that focuses on high quality and great value.

We are converting from a batch processing system to a cellular manufacturing system. Also all commercial adds have been updated for a newer audience and our stores have changed to showcase complete sets of furniture rather than individual pieces.

We are currently embarked on the largest product, process, business re-invention in our history of our wood plant.

We are distribution with a sales force on the streets.

We are focusing on the basics.

We are in the process of updating our website to become more user friendly. In 2006 we purchased a CNC and at the IWF we purchased a gang rip, moulder and knife grinder. We are letting our contractors and contractor in the area know of our machinery and the capabilities we now have.

We are also in the process of erecting a new 8000 sq. ft. facility.

We are looking at how we can better service our customers needs and improve on them.

We are moving to strip line manufacturing for panel parts and getting as automated as possible using robotics and powered roller conveyors and scissor lifts. Our Sales strategy is to develop our dealers and train them to assist their adjustment towards the remodeling market. We are also looking into branching into closet organizers.

We are not embracing any new tactics at this time.

We build a quality product for a fair price.

We continue to strengthen our member culture of continuous improvement.

We do have the basic infrastructure in place for our factory, but we are partially held up by Town&Country planning.

We have been working to increase brand awareness by upgrading our literature, show booths, etc. We have also continued to develop new products into our product line to continue to offer more variety while maintaining a product that will compete with our competitors.

We have begun concentrating a greater amount of our marketing dollars on the remodeling industry.

We have developed in house quoting forms for our specific products. In 2007 we upgraded our electrical service, purchased \$120,000 in equipment (all at the 2006 IWF show), moved our entire operation around for better flow, knocked down walls and unused rooms within the production facility, and had a large employee turnover.

We have doubled the size of our mill, invested heavily into optimizing equipment, built a second warehouse facility and most recently we have installed a new order entry system that allows us to enter and track orders and inventory far better than we ever have.

We have for the first time in 14 years started a marketing campaign that has distributed over 200 letters and brochures to various targeted clients.

We have also made some face to face contacts with potential clients in trying to establish new business relationships.

We have franchised our name, we have added new product lines.

We have invested in thin Kerf multiple horizontal bandsaws, bringing our yield up from approx. 45% to 58% on the production side. We are also investing in a scanner and two chopsaws, plus the whole transfer system for our reman facility, have closed our sales office and are focusing on less products although diversifying markets,

We have monthly meetings with all employees together and discuss work in progress, work that is finished and work that is scheduled. We discuss shop issues and everything is allowed to be on the table with no repercussions. What is discussed at this meeting stays at the meeting.

We have sought to market our services by capitalizing on the buddy system and the Internet, i.e., putting ourselves on a series of related sites and having our own site to have a virtual presence. The combination has proven to be successful due to the broad brush approach -- being linked to sites where our product is also part of the bigger picture -- and of course, our own site. We also work hard at people skills, becoming visible through participating in local and state functions and associations.

We have started new product lines and are widening our sales territory.

We have started to diversify our product line more.

We have tried to move to a leaner environment and have used more shop floor data collection to help manage our production.

We intend to add production space in a new building.

We look for niche markets not related to housing.

We manage/cut all the timber ourselves. We've added our own sawmill. All the lumber is dried in our kilns, using the scraps of the wood that is leftover. There is no waste.

We may be starting a spray equipment line and are opening retail locations to promote sales.

We need to get better yield, better quality and control in our production to give our customer more trust.

We now have a custom cabinet line to go with our cabinets we make.

We now use only degreed engineers as sales/ application personnel.

We only do direct sales. We do have a couple of showcases in the area but most of our new customers are referrals or direct. We are adding a website and refining our approach to direct sales and focusing on specific niches in our business. So far we have been more successful than we hoped.

We stress service, as a distributor it is our most important product.

We use direct marketing. Find the customers we want to solicit and sell them direct, versus letting the customers come to us.

We will offer new products and green products.

We will use Kaisen.

Website.

Websites, brochures, sales force recruitment, quality control.

We've begun using more time studies in our production areas to maximize our daily volumes.

We've implemented two new marketing strategies this Spring related to direct mailing incentives emanating from our office locations, not through traditional direct mailing houses.

Wide distribution of catalogues

Will concentrate on some plastic and metal working business.

Work harder / faster.

Work smarter not harder.

Work toward shorter and more accurate lead times.

Work with customers from hell usually successfully.



Appendix B:

DATA TABLES



Table 1
PRIMARY PRODUCT

Q.1: WHAT IS THE PRIMARY PRODUCT YOUR COMPANY MANUFACTURES?

	BUSINESS OUTLOOK CY 2008									COUNTRY-OF-ORIGIN	
	TOTAL	NUMBER OF EMPLOYEES		OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	EXPECTED CAP IMPR 2008			IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)	
		1-19 (A)	20+ (B)			\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)			
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%	
KITCHEN CABINETS/BATHROOM VANITIES	161 23.0%	96 28.5%	65 17.9%	110 24.9%	51 19.6%	83 23.7%	48 21.3%	30 23.8%	100 22.5%	61 23.7%	
WOOD HOUSEHOLD FURNITURE	91 13.0%	63 18.7%	28 7.7%	48 10.9%	43 16.5%	62 17.7%	17 7.6%	12 9.5%	65 14.6%	26 10.1%	
ARCHITECTURAL WOODWORK MOULDINGS	72 10.3%	28 8.3%	44 12.1%	58 13.2%	14 5.4%	39 11.1%	26 11.6%	7 5.6%	48 10.8%	24 9.3%	
MILLWORK (MOULDINGS, STAIRS, DOORS, WINDOWS)	67 9.6%	26 7.7%	41 11.3%	41 9.3%	26 10.0%	28 8.0%	26 11.6%	13 10.3%	44 9.9%	23 8.9%	
WOOD COMPONENTS	37 5.3%	18 5.3%	19 5.2%	18 4.1%	19 7.3%	18 5.1%	14 6.2%	5 4.0%	23 5.2%	14 5.4%	
STORE FIXTURES/DISPLAYS	35 5.0%	5 1.5%	30 8.2%	23 5.2%	12 4.6%	13 3.7%	15 6.7%	7 5.6%	25 5.6%	10 3.9%	
MACHINERY-RELATED *	32 4.6%	24 7.1%	8 2.2%	16 3.6%	16 6.2%	20 5.7%	3 1.3%	9 7.1%	22 5.0%	10 3.9%	
OFFICE FURNITURE	31 4.4%	5 1.5%	26 7.1%	20 4.5%	11 4.2%	6 1.7%	17 7.6%	8 6.3%	17 3.8%	14 5.4%	
CLOSET/GARAGE ORGANIZATION SYSTEMS	18 2.6%	11 3.3%	7 1.9%	8 1.8%	10 3.8%	12 3.4%	3 1.3%	3 2.4%	10 2.3%	8 3.1%	
DISTRIBUTOR/DEALER *	18 2.6%	6 1.8%	12 3.3%	10 2.3%	8 3.1%	6 1.7%	5 2.2%	7 5.6%	10 2.3%	8 3.1%	

* NOT PRELISTED RESPONSE.

NOTE: SEE REPORT FOR COMPLETE LISTING OF "OTHER" VERBATIM RESPONSES.

Table 1
PRIMARY PRODUCT

Q.1: WHAT IS THE PRIMARY PRODUCT YOUR COMPANY MANUFACTURES?

	BUSINESS OUTLOOK CY 2008									COUNTRY-OF-ORIGIN	
	TOTAL	NUMBER OF EMPLOYEES		OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	EXPECTED CAP IMPR 2008			IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)	
		1-19 (A)	20+ (B)			\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)			
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%	
FURNITURE *	14 2.0%	4 1.2%	10 2.7%	7 1.6%	7 2.7%	5 1.4%	5 2.2%	4 3.2%	8 1.8%	6 2.3%	
FLOORING *	14 2.0%	2 0.6%	12 3.3% A	4 0.9%	10 3.8% C	3 0.9%	9 4.0% E	2 1.6%	7 1.6%	7 2.7%	
OTHER	111 15.8%	49 14.5%	62 17.0%	78 17.7%	33 12.7%	55 15.7%	37 16.4%	19 15.1%	65 14.6%	46 17.9%	
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

* NOT PRELISTED RESPONSE.

NOTE: SEE REPORT FOR COMPLETE LISTING OF "OTHER" VERBATIM RESPONSES.

Table 2
GEOGRAPHIC LOCATION: COUNTRY

Q.2: PLEASE INDICATE THE MAIN GEOGRAPHIC LOCATION OF THE OFFICE/PLANT WHERE YOU WORK.

	TOTAL	NUMBER OF EMPLOYEES		BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
		1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
UNITED STATES	615 87.7%	312 92.6% B	303 83.2%	382 86.6%	233 89.6%	322 92.0% F	178 79.1%	115 91.3% F	390 87.8%	225 87.5%
CANADA	41 5.8%	11 3.3%	30 8.2% A	27 6.1%	14 5.4%	12 3.4%	22 9.8% E	7 5.6%	25 5.6%	16 6.2%
OTHER	45 6.4%	14 4.2%	31 8.5% A	32 7.3%	13 5.0%	16 4.6%	25 11.1% EG	4 3.2%	29 6.5%	16 6.2%
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

NOTE: SEE REPORT FOR COMPLETE LISTING OF "OTHER" VERBATIM RESPONSES.

Table 3
GEOGRAPHIC LOCATION: STATE

Q.2B: IN WHICH SPECIFIC STATE IS YOUR PERSONAL PLACE OF BUSINESS LOCATED?

* BASED ON THOSE LOCATED IN THE UNITED STATES *

	TOTAL	NUMBER OF EMPLOYEES		BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
		1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
		-----	-----	-----	-----	-----	-----	-----	-----	-----
BASE	615 100.0%	312 100.0%	303 100.0%	382 100.0%	233 100.0%	322 100.0%	178 100.0%	115 100.0%	390 100.0%	225 100.0%
<u>SOUTH (NET)</u>	368 59.8%	211 67.6% B	157 51.8%	226 59.2%	142 60.9%	215 66.8% F	87 48.9%	66 57.4%	234 60.0%	134 59.6%
<u>SOUTH ATLANTIC (SUBNET)</u>	232 37.7%	137 43.9% B	95 31.4%	144 37.7%	88 37.8%	139 43.2% F	55 30.9%	38 33.0%	143 36.7%	89 39.6%
GEORGIA	112 18.2%	74 23.7% B	38 12.5%	68 17.8%	44 18.9%	72 22.4% F	21 11.8%	19 16.5%	61 15.6%	51 22.7% H
FLORIDA	49 8.0%	35 11.2% B	14 4.6%	34 8.9%	15 6.4%	35 10.9% F	6 3.4%	8 7.0%	32 8.2%	17 7.6%
NORTH CAROLINA	34 5.5%	11 3.5%	23 7.6% A	19 5.0%	15 6.4%	12 3.7%	17 9.6% E	5 4.3%	26 6.7%	8 3.6%
VIRGINIA	18 2.9%	5 1.6%	13 4.3%	10 2.6%	8 3.4%	9 2.8%	6 3.4%	3 2.6%	9 2.3%	9 4.0%
SOUTH CAROLINA	10 1.6%	6 1.9%	4 1.3%	8 2.1%	2 0.9%	5 1.6%	3 1.7%	2 1.7%	8 2.1%	2 0.9%
MARYLAND	4 0.7%	2 0.6%	2 0.7%	2 0.5%	2 0.9%	2 0.6%	2 1.1%	-	3 0.8%	1 0.4%
WEST VIRGINIA	4 0.7%	3 1.0%	1 0.3%	2 0.5%	2 0.9%	3 0.9%	-	1 0.9%	3 0.8%	1 0.4%
DELAWARE	1 0.2%	1 0.3%	-	1 0.3%	-	1 0.3%	-	-	1 0.3%	-
WASHINGTON, D.C.	-	-	-	-	-	-	-	-	-	-

Table 3
GEOGRAPHIC LOCATION: STATE

Q.2B: IN WHICH SPECIFIC STATE IS YOUR PERSONAL PLACE OF BUSINESS LOCATED?

* BASED ON THOSE LOCATED IN THE UNITED STATES *

	BUSINESS OUTLOOK CY 2008									COUNTRY-OF-ORIGIN	
	TOTAL	NUMBER OF EMPLOYEES		OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	EXPECTED CAP IMPR 2008			IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)	
		1-19 (A)	20+ (B)			\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)			
BASE	615 100.0%	312 100.0%	303 100.0%	382 100.0%	233 100.0%	322 100.0%	178 100.0%	115 100.0%	390 100.0%	225 100.0%	
EAST SOUTH CENTRAL (SUBNET)	96 15.6%	53 17.0%	43 14.2%	57 14.9%	39 16.7%	53 16.5%	22 12.4%	21 18.3%	69 17.7%	27 12.0%	

TENNESSEE	40 6.5%	24 7.7%	16 5.3%	25 6.5%	15 6.4%	26 8.1% F	5 2.8%	9 7.8%	27 6.9%	13 5.8%	
ALABAMA	34 5.5%	19 6.1%	15 5.0%	23 6.0%	11 4.7%	17 5.3%	9 5.1%	8 7.0%	27 6.9% I	7 3.1%	
KENTUCKY	11 1.8%	4 1.3%	7 2.3%	6 1.6%	5 2.1%	5 1.6%	5 2.8%	1 0.9%	9 2.3%	2 0.9%	
MISSISSIPPI	11 1.8%	6 1.9%	5 1.7%	3 0.8%	8 3.4% C	5 1.6%	3 1.7%	3 2.6%	6 1.5%	5 2.2%	
WEST SOUTH CENTRAL (SUBNET)	40 6.5%	21 6.7%	19 6.3%	25 6.5%	15 6.4%	23 7.1%	10 5.6%	7 6.1%	22 5.6%	18 8.0%	

TEXAS	23 3.7%	11 3.5%	12 4.0%	14 3.7%	9 3.9%	11 3.4%	7 3.9%	5 4.3%	13 3.3%	10 4.4%	
LOUISIANA	9 1.5%	6 1.9%	3 1.0%	7 1.8%	2 0.9%	9 2.8% FG	-	-	5 1.3%	4 1.8%	
ARKANSAS	6 1.0%	4 1.3%	2 0.7%	3 0.8%	3 1.3%	3 0.9%	2 1.1%	1 0.9%	3 0.8%	3 1.3%	
OKLAHOMA	2 0.3%	-	2 0.7%	1 0.3%	1 0.4%	-	1 0.6%	1 0.9%	1 0.3%	1 0.4%	
MIDWEST (NET)	129 21.0%	59 18.9%	70 23.1%	82 21.5%	47 20.2%	63 19.6%	46 25.8%	20 17.4%	87 22.3%	42 18.7%	

Table 3
GEOGRAPHIC LOCATION: STATE

Q.2B: IN WHICH SPECIFIC STATE IS YOUR PERSONAL PLACE OF BUSINESS LOCATED?

* BASED ON THOSE LOCATED IN THE UNITED STATES *

	BUSINESS OUTLOOK CY 2008									
	TOTAL	NUMBER OF EMPLOYEES		OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
		1-19 (A)	20+ (B)			\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
BASE	615 100.0%	312 100.0%	303 100.0%	382 100.0%	233 100.0%	322 100.0%	178 100.0%	115 100.0%	390 100.0%	225 100.0%
EAST NORTH CENTRAL (SUBNET)	81 13.2%	39 12.5%	42 13.9%	51 13.4%	30 12.9%	40 12.4%	28 15.7%	13 11.3%	56 14.4%	25 11.1%
INDIANA	20 3.3%	6 1.9%	14 4.6%	10 2.6%	10 4.3%	5 1.6%	14 7.9% EG	1 0.9%	12 3.1%	8 3.6%
ILLINOIS	18 2.9%	7 2.2%	11 3.6%	13 3.4%	5 2.1%	8 2.5%	9 5.1% G	1 0.9%	12 3.1%	6 2.7%
WISCONSIN	18 2.9%	12 3.8%	6 2.0%	12 3.1%	6 2.6%	12 3.7%	3 1.7%	3 2.6%	11 2.8%	7 3.1%
OHIO	17 2.8%	11 3.5%	6 2.0%	13 3.4%	4 1.7%	11 3.4% F	1 0.6%	5 4.3%	14 3.6%	3 1.3%
MICHIGAN	8 1.3%	3 1.0%	5 1.7%	3 0.8%	5 2.1%	4 1.2%	1 0.6%	3 2.6%	7 1.8%	1 0.4%
WEST NORTH CENTRAL (SUBNET)	48 7.8%	20 6.4%	28 9.2%	31 8.1%	17 7.3%	23 7.1%	18 10.1%	7 6.1%	31 7.9%	17 7.6%
MINNESOTA	19 3.1%	5 1.6%	14 4.6% A	13 3.4%	6 2.6%	8 2.5%	9 5.1%	2 1.7%	12 3.1%	7 3.1%
MISSOURI	15 2.4%	8 2.6%	7 2.3%	11 2.9%	4 1.7%	7 2.2%	5 2.8%	3 2.6%	10 2.6%	5 2.2%
KANSAS	6 1.0%	1 0.3%	5 1.7%	3 0.8%	3 1.3%	2 0.6%	3 1.7%	1 0.9%	4 1.0%	2 0.9%
IOWA	5 0.8%	4 1.3%	1 0.3%	3 0.8%	2 0.9%	4 1.2% G	1 0.6%	-	3 0.8%	2 0.9%

Table 3
GEOGRAPHIC LOCATION: STATE

Q.2B: IN WHICH SPECIFIC STATE IS YOUR PERSONAL PLACE OF BUSINESS LOCATED?

* BASED ON THOSE LOCATED IN THE UNITED STATES *

	BUSINESS OUTLOOK CY 2008									EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
	TOTAL	NUMBER OF EMPLOYEES		OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)				
		1-19 (A)	20+ (B)											
BASE	615 100.0%	312 100.0%	303 100.0%	382 100.0%	233 100.0%	322 100.0%	178 100.0%	115 100.0%	390 100.0%	225 100.0%				
NEBRASKA	2 0.3%	1 0.3%	1 0.3%	-	2 0.9%	2 0.6%	-	-	1 0.3%	1 0.4%				
SOUTH DAKOTA	1 0.2%	1 0.3%	-	1 0.3%	-	-	-	1 0.9%	1 0.3%	-				
NORTH DAKOTA	-	-	-	-	-	-	-	-	-	-				
<u>NORTHEAST (NET)</u>	61 9.9%	18 5.8%	43 14.2% A	39 10.2%	22 9.4%	23 7.1%	24 13.5% E	14 12.2%	36 9.2%	25 11.1%				
<u>MIDDLE ATLANTIC (SUBNET)</u>	44 7.2%	11 3.5%	33 10.9% A	27 7.1%	17 7.3%	18 5.6%	16 9.0%	10 8.7%	23 5.9%	21 9.3%				
PENNSYLVANIA	26 4.2%	7 2.2%	19 6.3% A	14 3.7%	12 5.2%	12 3.7%	9 5.1%	5 4.3%	16 4.1%	10 4.4%				
NEW YORK	13 2.1%	2 0.6%	11 3.6% A	9 2.4%	4 1.7%	3 0.9%	6 3.4%	4 3.5%	6 1.5%	7 3.1%				
NEW JERSEY	5 0.8%	2 0.6%	3 1.0%	4 1.0%	1 0.4%	3 0.9%	1 0.6%	1 0.9%	1 0.3%	4 1.8%				
<u>NEW ENGLAND (SUBNET)</u>	17 2.8%	7 2.2%	10 3.3%	12 3.1%	5 2.1%	5 1.6%	8 4.5%	4 3.5%	13 3.3%	4 1.8%				
MASSACHUSETTS	11 1.8%	6 1.9%	5 1.7%	7 1.8%	4 1.7%	4 1.2%	5 2.8%	2 1.7%	8 2.1%	3 1.3%				
NEW HAMPSHIRE	3 0.5%	1 0.3%	2 0.7%	3 0.8%	-	1 0.3%	1 0.6%	1 0.9%	3 0.8%	-				
MAINE	1 0.2%	-	1 0.3%	-	1 0.4%	-	-	1 0.9%	1 0.3%	-				

Table 3
GEOGRAPHIC LOCATION: STATE

Q.2B: IN WHICH SPECIFIC STATE IS YOUR PERSONAL PLACE OF BUSINESS LOCATED?

* BASED ON THOSE LOCATED IN THE UNITED STATES *

	BUSINESS OUTLOOK CY 2008									EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
	TOTAL	NUMBER OF EMPLOYEES		OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)				
		1-19 (A)	20+ (B)											
BASE	615 100.0%	312 100.0%	303 100.0%	382 100.0%	233 100.0%	322 100.0%	178 100.0%	115 100.0%	390 100.0%	225 100.0%				
VERMONT	1 0.2%	-	1 0.3%	1 0.3%	-	-	1 0.6%	-	-	1 0.4%				
CONNECTICUT	1 0.2%	-	1 0.3%	1 0.3%	-	-	1 0.6%	-	1 0.3%	-				
<u>WEST (NET)</u>	56 9.1%	24 7.7%	32 10.6%	34 8.9%	22 9.4%	21 6.5%	20 11.2%	15 13.0%	32 8.2%	24 10.7%				
<u>MOUNTAIN (SUBNET)</u>	30 4.9%	12 3.8%	18 5.9%	20 5.2%	10 4.3%	9 2.8%	15 8.4%	6 5.2%	17 4.4%	13 5.8%				
COLORADO	10 1.6%	6 1.9%	4 1.3%	9 2.4%	1 0.4%	6 1.9%	3 1.7%	1 0.9%	8 2.1%	2 0.9%				
UTAH	9 1.5%	2 0.6%	7 2.3%	4 1.0%	5 2.1%	-	7 3.9%	2 1.7%	3 0.8%	6 2.7%				
IDAHO	3 0.5%	1 0.3%	2 0.7%	2 0.5%	1 0.4%	-	1 0.6%	2 1.7%	1 0.3%	2 0.9%				
ARIZONA	3 0.5%	-	3 1.0%	1 0.3%	2 0.9%	2 0.6%	1 0.6%	-	2 0.5%	1 0.4%				
MONTANA	2 0.3%	2 0.6%	-	2 0.5%	-	-	1 0.6%	1 0.9%	2 0.5%	-				
WYOMING	1 0.2%	1 0.3%	-	1 0.3%	-	-	1 0.6%	-	1 0.3%	-				
NEW MEXICO	1 0.2%	-	1 0.3%	-	1 0.4%	1 0.3%	-	-	-	1 0.4%				
NEVADA	1 0.2%	-	1 0.3%	1 0.3%	-	-	1 0.6%	-	-	1 0.4%				

Table 3
GEOGRAPHIC LOCATION: STATE

Q.2B: IN WHICH SPECIFIC STATE IS YOUR PERSONAL PLACE OF BUSINESS LOCATED?

* BASED ON THOSE LOCATED IN THE UNITED STATES *

	TOTAL	NUMBER OF EMPLOYEES		BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
		1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
		-----	-----	-----	-----	-----	-----	-----	-----	-----
BASE	615 100.0%	312 100.0%	303 100.0%	382 100.0%	233 100.0%	322 100.0%	178 100.0%	115 100.0%	390 100.0%	225 100.0%
PACIFIC (SUBNET)	26 4.2%	12 3.8%	14 4.6%	14 3.7%	12 5.2%	12 3.7%	5 2.8%	9 7.8%	15 3.8%	11 4.9%
CALIFORNIA	10 1.6%	6 1.9%	4 1.3%	4 1.0%	6 2.6%	7 2.2% F	-	3 2.6%	3 0.8%	7 3.1%
WASHINGTON	9 1.5%	3 1.0%	6 2.0%	6 1.6%	3 1.3%	3 0.9%	2 1.1%	4 3.5%	7 1.8%	2 0.9%
OREGON	7 1.1%	3 1.0%	4 1.3%	4 1.0%	3 1.3%	2 0.6%	3 1.7%	2 1.7%	5 1.3%	2 0.9%
ALASKA	-	-	-	-	-	-	-	-	-	-
HAWAII	-	-	-	-	-	-	-	-	-	-
PUERTO RICO	1 0.2%	-	1 0.3%	1 0.3%	-	-	1 0.6%	-	1 0.3%	-
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 4
GEOGRAPHIC LOCATION: CANADIAN PROVINCE

Q.2C: IN WHICH CANADIAN PROVINCE IS YOUR PERSONAL PLACE OF BUSINESS LOCATED?

* BASED ON THOSE LOCATED IN CANADA *

	BUSINESS OUTLOOK CY 2008									COUNTRY-OF-ORIGIN	
	TOTAL	NUMBER OF EMPLOYEES		OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	EXPECTED CAP IMPR 2008			IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)	
		1-19 (A)	20+ (B)			\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)			
BASE	41 100.0%	11 100.0%	30 100.0%	27 100.0%	14 100.0%	12 100.0%	22 100.0%	7 100.0%	25 100.0%	16 100.0%	
ONTARIO	15 36.6%	5 45.5%	10 33.3%	8 29.6%	7 50.0%	3 25.0%	7 31.8%	5 71.4% E	7 28.0%	8 50.0%	
QUEBEC	12 29.3%	3 27.3%	9 30.0%	9 33.3%	3 21.4%	3 25.0%	9 40.9% G	-	7 28.0%	5 31.3%	
ALBERTA	6 14.6%	1 9.1%	5 16.7%	5 18.5%	1 7.1%	4 33.3%	1 4.5%	1 14.3%	5 20.0%	1 6.3%	
BRITISH COLUMBIA	4 9.8%	1 9.1%	3 10.0%	2 7.4%	2 14.3%	1 8.3%	2 9.1%	1 14.3%	3 12.0%	1 6.3%	
NOVA SCOTIA	2 4.9%	1 9.1%	1 3.3%	1 3.7%	1 7.1%	1 8.3%	1 4.5%	-	1 4.0%	1 6.3%	
MANITOBA	1 2.4%	-	1 3.3%	1 3.7%	-	-	1 4.5%	-	1 4.0%	-	
NEW BRUNSWICK	1 2.4%	-	1 3.3%	1 3.7%	-	-	1 4.5%	-	1 4.0%	-	
NEWFOUNDLAND AND LABRADOR	-	-	-	-	-	-	-	-	-	-	
NORTHWEST TERRITORIES	-	-	-	-	-	-	-	-	-	-	
NUNAVUT	-	-	-	-	-	-	-	-	-	-	
PRINCE EDWARD ISLAND	-	-	-	-	-	-	-	-	-	-	
SASKATCHEWAN	-	-	-	-	-	-	-	-	-	-	

Table 4
GEOGRAPHIC LOCATION: CANADIAN PROVINCE

Q.2C: IN WHICH CANADIAN PROVINCE IS YOUR PERSONAL PLACE OF BUSINESS LOCATED?

* BASED ON THOSE LOCATED IN CANADA *

	NUMBER OF EMPLOYEES		BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN		
	TOTAL	1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
BASE	41 100.0%	11 100.0%	30 100.0%	27 100.0%	14 100.0%	12 100.0%	22 100.0%	7 100.0%	25 100.0%	16 100.0%
YUKON	-	-	-	-	-	-	-	-	-	-
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 5
NUMBER OF EMPLOYEES

Q.3: HOW MANY, INCLUDING YOU, ARE CURRENTLY EMPLOYED AT YOUR OPERATION? IF YOUR COMPANY HAS MULTIPLE LOCATIONS, PLEASE SELECT THE NUMBER OF EMPLOYEES AT ALL LOCATIONS COMBINED.

	NUMBER OF EMPLOYEES		BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN		
	TOTAL	1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
1 - 19 -----	337 48.1%	337 100.0% B	-	225 51.0% D	112 43.1%	262 74.9% FG	29 12.9%	46 36.5% F	220 49.5%	117 45.5%
1 - 4	195 27.8%	195 57.9% B	-	120 27.2%	75 28.8%	167 47.7% FG	2 0.9%	26 20.6% F	136 30.6% I	59 23.0%
5 - 19	142 20.3%	142 42.1% B	-	105 23.8% D	37 14.2%	95 27.1% FG	27 12.0%	20 15.9%	84 18.9%	58 22.6%
20 OR MORE -----	364 51.9%	-	364 100.0% A	216 49.0%	148 56.9% C	88 25.1%	196 87.1% EG	80 63.5% E	224 50.5%	140 54.5%
20 - 49	102 14.6%	-	102 28.0% A	67 15.2%	35 13.5%	51 14.6%	32 14.2%	19 15.1%	68 15.3%	34 13.2%
50 - 99	68 9.7%	-	68 18.7% A	41 9.3%	27 10.4%	19 5.4%	32 14.2% E	17 13.5% E	40 9.0%	28 10.9%
100 OR MORE	194 27.7%	-	194 53.3% A	108 24.5%	86 33.1% C	18 5.1%	132 58.7% EG	44 34.9% E	116 26.1%	78 30.4%
MEAN	56.9	6.5	103.5 A	52.4	64.4 C	21.2	105.0 EG	70.1 E	54.2	61.5
MEDIAN	23.8	3.6	149.1	18.4	34.9	6.2	149.3	45.9	20.9	29.8
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

NOTE: MIDPOINT OF RANGES USED TO CALCULATE MEAN AND MEDIAN. 150 USED FOR 100 OR MORE.

Table 6
NUMBER OF LOCATIONS

Q3A: HOW MANY OPERATING LOCATIONS DOES YOUR COMPANY HAVE CURRENTLY?

	BUSINESS OUTLOOK CY 2008									COUNTRY-OF-ORIGIN	
	TOTAL	NUMBER OF EMPLOYEES		OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	EXPECTED CAP IMPR 2008			IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)	
		1-19 (A)	20+ (B)			\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)			
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%	
1	469 66.9%	312 92.6% B	157 43.1%	312 70.7% D	157 60.4%	301 86.0% FG	97 43.1%	71 56.3% F	312 70.3% I	157 61.1%	
2	85 12.1%	17 5.0%	68 18.7% A	47 10.7%	38 14.6%	28 8.0%	43 19.1% EG	14 11.1%	48 10.8%	37 14.4%	
3 OR MORE (NET) -----	147 21.0%	8 2.4%	139 38.2% A	82 18.6%	65 25.0%	21 6.0%	85 37.8% E	41 32.5% E	84 18.9%	63 24.5%	
3 - 5	68 9.7%	8 2.4%	60 16.5% A	39 8.8%	29 11.2%	12 3.4%	41 18.2% E	15 11.9% E	41 9.2%	27 10.5%	
6 - 9	26 3.7%	-	26 7.1% A	14 3.2%	12 4.6%	2 0.6%	16 7.1% E	8 6.3% E	11 2.5%	15 5.8% H	
10 - 19	20 2.9%	-	20 5.5% A	11 2.5%	9 3.5%	2 0.6%	14 6.2% E	4 3.2%	15 3.4%	5 1.9%	
20 OR MORE	33 4.7%	-	33 9.1% A	18 4.1%	15 5.8%	5 1.4%	14 6.2% E	14 11.1% E	17 3.8%	16 6.2%	
MEAN	3.2	1.1	5.1 A	2.9	3.6	1.6	4.5 E	5.0 E	2.9	3.6	
MEDIAN	7.5	-	7.5	7.5	7.5	7.5	7.5	7.5	7.5	7.5	
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

NOTE: MIDPOINT OF RANGES USED TO CALCULATE MEAN AND MEDIAN. 25 USED FOR 20 OR MORE.

Table 7
WHETHER ATTENDING IWF 2008

Q.4A: DO YOU PERSONALLY PLAN TO ATTEND IWF 2008, AUGUST 20-23, IN ATLANTA?

	TOTAL	NUMBER OF EMPLOYEES		BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
		1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
YES	543 77.5%	273 81.0%	270 74.2%	342 77.6%	201 77.3%	281 80.3%	175 77.8%	87 69.0%	339 76.4%	204 79.4%
NO	37 5.3%	15 4.5%	22 6.0%	25 5.7%	12 4.6%	14 4.0%	14 6.2%	9 7.1%	26 5.9%	11 4.3%
NOT SURE	121 17.3%	49 14.5%	72 19.8%	74 16.8%	47 18.1%	55 15.7%	36 16.0%	30 23.8%	79 17.8%	42 16.3%
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 8
NUMBER TO ATTEND IWF 2008

Q.4B: HOW MANY PEOPLE FROM YOUR COMPANY DO YOU EXPECT WILL ATTEND IWF 2008?

	BUSINESS OUTLOOK CY 2008									COUNTRY-OF-ORIGIN	
	TOTAL	NUMBER OF EMPLOYEES		OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	EXPECTED CAP IMPR 2008			IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)	
		1-19 (A)	20+ (B)			\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)			
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%	
ZERO	27 3.9%	10 3.0%	17 4.7%	18 4.1%	9 3.5%	11 3.1%	11 4.9%	5 4.0%	19 4.3%	8 3.1%	
ONE OR MORE (NET) -----	674 96.1%	327 97.0%	347 95.3%	423 95.9%	251 96.5%	339 96.9%	214 95.1%	121 96.0%	425 95.7%	249 96.9%	
1	141 20.1%	115 34.1% B	26 7.1%	78 17.7%	63 24.2% C	101 28.9% F	11 4.9%	29 23.0% F	95 21.4%	46 17.9%	
2	219 31.2%	141 41.8% B	78 21.4%	151 34.2% D	68 26.2%	138 39.4% FG	52 23.1%	29 23.0%	141 31.8%	78 30.4%	
3 - 4	187 26.7%	64 19.0%	123 33.8% A	125 28.3%	62 23.8%	86 24.6%	67 29.8%	34 27.0%	113 25.5%	74 28.8%	
5 OR MORE	127 18.1%	7 2.1%	120 33.0% A	69 15.6%	58 22.3% C	14 4.0%	84 37.3% EG	29 23.0% E	76 17.1%	51 19.8%	
MEAN	3.8	2.0	5.5 A	3.4	4.5 C	2.3	5.8 E	4.5 E	3.8	3.8	
MEDIAN	2.0	2.0	4.0	2.0	2.0	2.0	4.0	3.0	2.0	3.0	
MODE	2	2	2	2	2	2	2	-	2	2	
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

NOTE: ZERO EXCLUDED FROM MEAN AND MEDIAN.

Table 9
ATTENDANCE IWF 2008 COMPARED TO IWF 2006

Q.4C: HOW DOES THIS COMPARE TO YOUR COMPANY'S ATTENDANCE AT IWF 2006?

	TOTAL	NUMBER OF EMPLOYEES		BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
		1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
ABOUT THE SAME NUMBER OF PEOPLE ATTENDING IN 2008 AS 2006	464 66.2%	231 68.5%	233 64.0%	293 66.4%	171 65.8%	238 68.0%	136 60.4%	90 71.4% F	295 66.4%	169 65.8%
MORE PEOPLE ATTENDING IN 2008 THAN 2006	114 16.3%	58 17.2%	56 15.4%	79 17.9%	35 13.5%	59 16.9% G	43 19.1% G	12 9.5%	72 16.2%	42 16.3%
FEWER PEOPLE ATTENDING IN 2008 THAN 2006	97 13.8%	36 10.7%	61 16.8% A	48 10.9%	49 18.8% C	40 11.4%	37 16.4%	20 15.9%	62 14.0%	35 13.6%
COMPANY PERSONNEL DID NOT ATTEND IN 2006	10 1.4%	6 1.8%	4 1.1%	9 2.0% D	1 0.4%	6 1.7%	3 1.3%	1 0.8%	6 1.4%	4 1.6%
DON'T KNOW	16 2.3%	6 1.8%	10 2.7%	12 2.7%	4 1.5%	7 2.0%	6 2.7%	3 2.4%	9 2.0%	7 2.7%
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 10
NUMBER TO ATTEND IWF 2008 VS. ATTENDANCE IN 2008 COMPARED TO 2006

Q.4B: HOW MANY PEOPLE FROM YOUR COMPANY DO YOU EXPECT WILL ATTEND IWF 2008?
Q.4C: HOW DOES THIS COMPARE TO YOUR COMPANY'S ATTENDANCE AT IWF 2006?

	TOTAL	MORE PEOPLE ATTENDING IN 2008 THAN 2006 (A)	FEWER PEOPLE ATTENDING IN 2008 THAN 2006 (B)	ABOUT THE SAME NUMBER OF PEOPLE ATTENDING IN 2008 AS 2006 (C)	COMPANY PERSONNEL DID NOT ATTEND IN 2006 (D)	DON'T KNOW (E)
	-----	-----	-----	-----	-----	-----
BASE	701 100.0% 100.0%	114 100.0% 16.3%	97 100.0% 13.8%	464 100.0% 66.2%	10 100.0% 1.4%	16 100.0% 2.3%
ZERO	27 3.9% 100.0%	-	23 23.7% 85.2% AC	-	2 20.0% 7.4%	2 12.5% 7.4%
ONE OR MORE (NET)	674 96.1% 100.0%	114 100.0% 16.9% B	74 76.3% 11.0%	464 100.0% 68.8% B	8 80.0% 1.2%	14 87.5% 2.1%
1	141 20.1% 100.0%	1 0.9% 0.7%	13 13.4% 9.2% A	119 25.6% 84.4% AB	5 50.0% 3.5% AB	3 18.8% 2.1%
2	219 31.2% 100.0%	36 31.6% 16.4%	24 24.7% 11.0%	152 32.8% 69.4%	2 20.0% 0.9%	5 31.3% 2.3%
3 - 4	187 26.7% 100.0%	49 43.0% 26.2% BCDE	12 12.4% 6.4%	122 26.3% 65.2% B	1 10.0% 0.5%	3 18.8% 1.6%
5 OR MORE	127 18.1% 100.0%	28 24.6% 22.0% CD	25 25.8% 19.7% CD	71 15.3% 55.9% D	-	3 18.8% 2.4%
MEAN	3.8	4.2 CD	6.1 CD	3.3 D	1.6	5.9
MEDIAN	2.0	3.0	2.5	2.0	1.0	2.0
MODE	2	2	2	2	1	2

NOTE: ZERO EXCLUDED FROM MEAN AND MEDIAN.

NOTE: HORIZONTAL AS WELL AS VERTICAL PERCENTAGES ARE INCLUDED.

Table 10
 NUMBER TO ATTEND IWF 2008 VS. ATTENDANCE IN 2008 COMPARED TO 2006

Q.4B: HOW MANY PEOPLE FROM YOUR COMPANY DO YOU EXPECT WILL ATTEND IWF 2008?
 Q.4C: HOW DOES THIS COMPARE TO YOUR COMPANY'S ATTENDANCE AT IWF 2006?

	TOTAL	MORE PEOPLE ATTENDING IN 2008 THAN 2006 (A)	FEWER PEOPLE ATTENDING IN 2008 THAN 2006 (B)	ABOUT THE SAME NUMBER OF PEOPLE ATTENDING IN 2008 AS 2006 (C)	COMPANY PERSONNEL DID NOT ATTEND IN 2006 (D)	DON'T KNOW (E)
	-----	-----	-----	-----	-----	-----
BASE	701	114	97	464	10	16
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	100.0%	16.3%	13.8%	66.2%	1.4%	2.3%
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

NOTE: ZERO EXCLUDED FROM MEAN AND MEDIAN.

NOTE: HORIZONTAL AS WELL AS VERTICAL PERCENTAGES ARE INCLUDED.

Table 11
BUSINESS IN 2007

Q.5: IN COMPARISON TO THE LAST 3 YEARS, HOW WOULD YOU RATE YOUR COMPANY'S BUSINESS FOR CALENDAR YEAR 2007, THE YEAR JUST ENDED?

	BUSINESS OUTLOOK CY 2008									COUNTRY-OF-ORIGIN	
	TOTAL	NUMBER OF EMPLOYEES		OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	EXPECTED CAP IMPR 2008			IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)	
		1-19 (A)	20+ (B)			\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)			
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%	
TOP 2 BOX (NET) -----	423 60.3%	198 58.8%	225 61.8%	353 80.0% D	70 26.9%	195 55.7%	148 65.8% E	80 63.5%	271 61.0%	152 59.1%	
EXCELLENT	142 20.3%	71 21.1%	71 19.5%	130 29.5% D	12 4.6%	67 19.1%	53 23.6%	22 17.5%	87 19.6%	55 21.4%	
GOOD	281 40.1%	127 37.7%	154 42.3%	223 50.6% D	58 22.3%	128 36.6%	95 42.2%	58 46.0%	184 41.4%	97 37.7%	
FAIR	212 30.2%	109 32.3%	103 28.3%	81 18.4%	131 50.4% C	122 34.9% F	54 24.0%	36 28.6%	132 29.7%	80 31.1%	
BOTTOM 2 BOX (NET) -----	66 9.4%	30 8.9%	36 9.9%	7 1.6%	59 22.7% C	33 9.4%	23 10.2%	10 7.9%	41 9.2%	25 9.7%	
POOR	55 7.8%	26 7.7%	29 8.0%	5 1.1%	50 19.2% C	27 7.7%	20 8.9%	8 6.3%	35 7.9%	20 7.8%	
TERRIBLE	11 1.6%	4 1.2%	7 1.9%	2 0.5%	9 3.5% C	6 1.7%	3 1.3%	2 1.6%	6 1.4%	5 1.9%	
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Table 12
EXPECTATIONS FOR BUSINESS IN 2008

Q.6A: HOW WELL DO YOU EXPECT YOUR COMPANY TO PERFORM IN CALENDAR YEAR 2008?

	BUSINESS OUTLOOK CY 2008									COUNTRY-OF-ORIGIN	
	TOTAL	NUMBER OF EMPLOYEES		OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	EXPECTED CAP IMPR 2008			IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)	
		1-19 (A)	20+ (B)			\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)			
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%	
TOP 2 BOX (NET) -----	441 62.9%	225 66.8% B	216 59.3%	441 100.0% D	-	223 63.7%	140 62.2%	78 61.9%	288 64.9%	153 59.5%	
EXCELLENT	119 17.0%	72 21.4% B	47 12.9%	119 27.0% D	-	57 16.3%	44 19.6%	18 14.3%	78 17.6%	41 16.0%	
GOOD	322 45.9%	153 45.4%	169 46.4%	322 73.0% D	-	166 47.4%	96 42.7%	60 47.6%	210 47.3%	112 43.6%	
FAIR	208 29.7%	97 28.8%	111 30.5%	-	208 80.0% C	108 30.9%	59 26.2%	41 32.5%	127 28.6%	81 31.5%	
BOTTOM 2 BOX (NET) -----	52 7.4%	15 4.5%	37 10.2% A	-	52 20.0% C	19 5.4%	26 11.6% EG	7 5.6%	29 6.5%	23 8.9%	
POOR	46 6.6%	11 3.3%	35 9.6% A	-	46 17.7% C	15 4.3%	25 11.1% EG	6 4.8%	26 5.9%	20 7.8%	
TERRIBLE	6 0.9%	4 1.2%	2 0.5%	-	6 2.3% C	4 1.1%	1 0.4%	1 0.8%	3 0.7%	3 1.2%	
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Table 13
BIGGEST OBSTACLE IN NEXT 3 YEARS

Q.7: WHICH ONE OF THE FOLLOWING ISSUES POSES THE SINGLE BIGGEST OBSTACLE TO YOUR COMPANY'S SUCCESS OVER THE NEXT 3 YEARS?

	BUSINESS OUTLOOK CY 2008									
	TOTAL	NUMBER OF EMPLOYEES		OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
		1-19 (A)	20+ (B)			\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
THE U.S. ECONOMY	302 43.1%	143 42.4%	159 43.7%	177 40.1%	125 48.1% C	149 42.6%	92 40.9%	61 48.4%	191 43.0%	111 43.2%
THE WEAK HOUSING MARKET	167 23.8%	66 19.6%	101 27.7% A	73 16.6%	94 36.2% C	72 20.6%	57 25.3%	38 30.2% E	97 21.8%	70 27.2%
RECRUITING/RETAINING SKILLED WOODWORKERS	99 14.1%	49 14.5%	50 13.7%	93 21.1% D	6 2.3%	52 14.9% G	39 17.3% G	8 6.3%	70 15.8%	29 11.3%
IMPORTED WOOD PRODUCTS	60 8.6%	29 8.6%	31 8.5%	43 9.8%	17 6.5%	34 9.7%	17 7.6%	9 7.1%	42 9.5%	18 7.0%
GOVERNMENT REGULATIONS	18 2.6%	9 2.7%	9 2.5%	16 3.6% D	2 0.8%	11 3.1% G	7 3.1% G	-	13 2.9%	5 1.9%
OTHER	55 7.8%	41 12.2% B	14 3.8%	39 8.8%	16 6.2%	32 9.1%	13 5.8%	10 7.9%	31 7.0%	24 9.3%
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

NOTE: SEE REPORT FOR COMPLETE LISTING OF "OTHER" VERBATIM RESPONSES.

Table 14
 EXPECTED INVESTMENT IN CAPITAL IMPROVEMENTS IN 2008

Q.8: APPROXIMATELY HOW MUCH WILL YOUR COMPANY INVEST IN CAPITAL IMPROVEMENTS IN 2008?

	BUSINESS OUTLOOK CY 2008									
	TOTAL	NUMBER OF EMPLOYEES		OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
		1-19 (A)	20+ (B)			\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
<u>\$100,000 OR LESS (NET)</u>	350 49.9%	262 77.7% B	88 24.2%	223 50.6%	127 48.8%	350 100.0% FG	-	-	224 50.5%	126 49.0%
\$10,000 OR LESS	151 21.5%	133 39.5% B	18 4.9%	80 18.1%	71 27.3% C	151 43.1% FG	-	-	91 20.5%	60 23.3%
\$10,001 - \$50,000	127 18.1%	96 28.5% B	31 8.5%	90 20.4% D	37 14.2%	127 36.3% FG	-	-	87 19.6%	40 15.6%
\$50,001 - \$100,000	72 10.3%	33 9.8%	39 10.7%	53 12.0% D	19 7.3%	72 20.6% FG	-	-	46 10.4%	26 10.1%
<u>MORE THAN \$100,000 (NET)</u>	225 32.1%	29 8.6%	196 53.8% A	140 31.7%	85 32.7%	-	225 100.0% EG	-	138 31.1%	87 33.9%
\$100,001 - \$250,000	82 11.7%	21 6.2%	61 16.8% A	59 13.4%	23 8.8%	-	82 36.4% EG	-	44 9.9%	38 14.8%
\$250,001 - \$500,000	57 8.1%	4 1.2%	53 14.6% A	33 7.5%	24 9.2%	-	57 25.3% EG	-	41 9.2%	16 6.2%
\$500,001 - \$1 MILLION	30 4.3%	2 0.6%	28 7.7% A	18 4.1%	12 4.6%	-	30 13.3% EG	-	23 5.2%	7 2.7%
MORE THAN \$1 MILLION	56 8.0%	2 0.6%	54 14.8% A	30 6.8%	26 10.0%	-	56 24.9% EG	-	30 6.8%	26 10.1%
DON'T KNOW/UNDECIDED	126 18.0%	46 13.6%	80 22.0% A	78 17.7%	48 18.5%	-	-	126 100.0% EF	82 18.5%	44 17.1%
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 15
 EXPECTED 2008 CAPITAL EXPENDITURES, BY CATEGORY (SUMMARY)

Q.9: WHICH OF THE FOLLOWING AREAS WILL YOUR COMPANY'S 2008 CAPITAL EXPENDITURE PROGRAMS TARGET? FOR EACH CATEGORY, PLEASE INDICATE HOW MUCH, IF ANYTHING, YOUR COMPANY WILL SPEND.

	TOTAL	\$0	\$1 OR MORE (NET)	\$1 - \$10,000	\$10,001 - \$50,000	\$50,001 - \$100,000	MORE THAN \$100,000	DON'T KNOW/ UNDECIDED
	-----	-----	-----	-----	-----	-----	-----	-----
ASSEMBLY	701 100.0%	263 37.5%	309 44.1%	200 28.5%	47 6.7%	27 3.9%	35 5.0%	129 18.4%
DUST CONTROL	701 100.0%	253 36.1%	309 44.1%	205 29.2%	60 8.6%	22 3.1%	22 3.1%	139 19.8%
FINISHING	701 100.0%	232 33.1%	348 49.6%	210 30.0%	60 8.6%	32 4.6%	46 6.6%	121 17.3%
LAMINATING	701 100.0%	409 58.3%	160 22.8%	92 13.1%	24 3.4%	11 1.6%	33 4.7%	132 18.8%
PANEL PROCESSING	701 100.0%	327 46.6%	244 34.8%	94 13.4%	60 8.6%	34 4.9%	56 8.0%	130 18.5%
SOFTWARE	701 100.0%	165 23.5%	390 55.6%	241 34.4%	86 12.3%	24 3.4%	39 5.6%	146 20.8%
SOLID WOOD MACHINING	701 100.0%	201 28.7%	366 52.2%	189 27.0%	76 10.8%	46 6.6%	55 7.8%	134 19.1%
VENEERING	701 100.0%	440 62.8%	133 19.0%	85 12.1%	22 3.1%	6 0.9%	20 2.9%	128 18.3%
WOOD WASTE MANAGEMENT	701 100.0%	357 50.9%	193 27.5%	101 14.4%	52 7.4%	15 2.1%	25 3.6%	151 21.5%

NOTE: SIGNIFICANCE TESTING NOT EMPLOYED DUE TO USE OF HORIZONTAL PERCENTAGES.

Table 16
 EXPECTED 2008 CAPITAL EXPENDITURES, BY CATEGORY: ASSEMBLY

Q.9: WHICH OF THE FOLLOWING AREAS WILL YOUR COMPANY'S 2008 CAPITAL EXPENDITURE PROGRAMS TARGET? FOR EACH CATEGORY, PLEASE INDICATE HOW MUCH, IF ANYTHING, YOUR COMPANY WILL SPEND.

	BUSINESS OUTLOOK CY 2008									
	NUMBER OF EMPLOYEES			BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
	TOTAL	1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
\$0	263 37.5%	149 44.2% B	114 31.3%	148 33.6%	115 44.2% C	159 45.4% FG	62 27.6%	42 33.3%	168 37.8%	95 37.0%
\$1 OR MORE (NET)	309 44.1%	136 40.4%	173 47.5%	217 49.2% D	92 35.4%	150 42.9% G	132 58.7% EG	27 21.4%	203 45.7%	106 41.2%
\$1 - \$50,000 (SUBNET)	247 35.2%	132 39.2% B	115 31.6%	177 40.1% D	70 26.9%	145 41.4% G	81 36.0% G	21 16.7%	163 36.7%	84 32.7%
\$1 - \$10,000	200 28.5%	125 37.1% B	75 20.6%	147 33.3% D	53 20.4%	135 38.6% FG	47 20.9%	18 14.3%	136 30.6%	64 24.9%
&10,001 - \$50,000	47 6.7%	7 2.1%	40 11.0% A	30 6.8%	17 6.5%	10 2.9%	34 15.1% EG	3 2.4%	27 6.1%	20 7.8%
MORE THAN \$50,000 (SUBNET)	62 8.8%	4 1.2%	58 15.9% A	40 9.1%	22 8.5%	5 1.4%	51 22.7% EG	6 4.8%	40 9.0%	22 8.6%
\$50,001 - \$100,000	27 3.9%	2 0.6%	25 6.9% A	18 4.1%	9 3.5%	5 1.4%	20 8.9% EG	2 1.6%	19 4.3%	8 3.1%
MORE THAN \$100,000	35 5.0%	2 0.6%	33 9.1% A	22 5.0%	13 5.0%	-	31 13.8% EG	4 3.2% E	21 4.7%	14 5.4%
DON'T KNOW/UNDECIDED	129 18.4%	52 15.4%	77 21.2%	76 17.2%	53 20.4%	41 11.7%	31 13.8%	57 45.2% EF	73 16.4%	56 21.8%

NOTE: MIDPOINT OF RANGES USED TO CALCULATE MEAN AND MEDIAN, ZERO EXCLUDED. \$200,000 USED FOR "MORE THAN \$100,000".

Table 16
 EXPECTED 2008 CAPITAL EXPENDITURES, BY CATEGORY: ASSEMBLY

Q.9: WHICH OF THE FOLLOWING AREAS WILL YOUR COMPANY'S 2008 CAPITAL EXPENDITURE PROGRAMS TARGET? FOR EACH CATEGORY, PLEASE INDICATE HOW MUCH, IF ANYTHING, YOUR COMPANY WILL SPEND.

	NUMBER OF EMPLOYEES		BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN		
	TOTAL	1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
MEAN	\$ 37,006	\$ 10,184	\$ 58,092 A	\$ 34,032	\$ 44,022	\$ 9,000	\$ 67,841 E	\$ 41,852 E	\$ 35,049	\$ 40,755
MEDIAN	\$ 5,001	\$ 5,000	\$ 30,000	\$ 5,000	\$ 5,001	\$ 5,000	\$ 30,000	\$ 5,001	\$ 5,000	\$ 5,001
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

NOTE: MIDPOINT OF RANGES USED TO CALCULATE MEAN AND MEDIAN, ZERO EXCLUDED. \$200,000 USED FOR "MORE THAN \$100,000".

Table 17
 EXPECTED 2008 CAPITAL EXPENDITURES, BY CATEGORY: DUST CONTROL

Q.9: WHICH OF THE FOLLOWING AREAS WILL YOUR COMPANY'S 2008 CAPITAL EXPENDITURE PROGRAMS TARGET? FOR EACH CATEGORY, PLEASE INDICATE HOW MUCH, IF ANYTHING, YOUR COMPANY WILL SPEND.

	BUSINESS OUTLOOK CY 2008									
	NUMBER OF EMPLOYEES			BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
	TOTAL	1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
\$0	253 36.1%	139 41.2% B	114 31.3%	144 32.7%	109 41.9% C	156 44.6% FG	61 27.1%	36 28.6%	156 35.1%	97 37.7%
\$1 OR MORE (NET)	309 44.1%	147 43.6%	162 44.5%	213 48.3% D	96 36.9%	150 42.9% G	126 56.0% EG	33 26.2%	206 46.4%	103 40.1%
\$1 - \$50,000 (SUBNET)	265 37.8%	143 42.4% B	122 33.5%	191 43.3% D	74 28.5%	150 42.9% G	87 38.7% G	28 22.2%	176 39.6%	89 34.6%
\$1 - \$10,000	205 29.2%	132 39.2% B	73 20.1%	147 33.3% D	58 22.3%	135 38.6% FG	47 20.9%	23 18.3%	141 31.8%	64 24.9%
&10,001 - \$50,000	60 8.6%	11 3.3%	49 13.5% A	44 10.0%	16 6.2%	15 4.3%	40 17.8% EG	5 4.0%	35 7.9%	25 9.7%
MORE THAN \$50,000 (SUBNET)	44 6.3%	4 1.2%	40 11.0% A	22 5.0%	22 8.5%	-	39 17.3% EG	5 4.0% E	30 6.8%	14 5.4%
\$50,001 - \$100,000	22 3.1%	3 0.9%	19 5.2% A	14 3.2%	8 3.1%	-	19 8.4% EG	3 2.4%	16 3.6%	6 2.3%
MORE THAN \$100,000	22 3.1%	1 0.3%	21 5.8% A	8 1.8%	14 5.4% C	-	20 8.9% EG	2 1.6%	14 3.2%	8 3.1%
DON'T KNOW/UNDECIDED	139 19.8%	51 15.1%	88 24.2% A	84 19.0%	55 21.2%	44 12.6%	38 16.9%	57 45.2% EF	82 18.5%	57 22.2%

NOTE: MIDPOINT OF RANGES USED TO CALCULATE MEAN AND MEDIAN, ZERO EXCLUDED. \$200,000 USED FOR "MORE THAN \$100,000".

Table 17
 EXPECTED 2008 CAPITAL EXPENDITURES, BY CATEGORY: DUST CONTROL

Q.9: WHICH OF THE FOLLOWING AREAS WILL YOUR COMPANY'S 2008 CAPITAL EXPENDITURE PROGRAMS TARGET? FOR EACH CATEGORY, PLEASE INDICATE HOW MUCH, IF ANYTHING, YOUR COMPANY WILL SPEND.

	NUMBER OF EMPLOYEES		BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN		
	TOTAL	1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
MEAN	\$ 28,722	\$ 9,626	\$ 46,049 A	\$ 22,089	\$ 43,438 C	\$ 7,500	\$ 54,444 EG	\$ 26,970 E	\$ 27,937	\$ 30,291
MEDIAN	\$ 5,001	\$ 5,000	\$ 29,999	\$ 5,000	\$ 5,001	\$ 5,000	\$ 30,000	\$ 5,000	\$ 5,000	\$ 5,001
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

NOTE: MIDPOINT OF RANGES USED TO CALCULATE MEAN AND MEDIAN, ZERO EXCLUDED. \$200,000 USED FOR "MORE THAN \$100,000".

Table 18
 EXPECTED 2008 CAPITAL EXPENDITURES, BY CATEGORY: FINISHING

Q.9: WHICH OF THE FOLLOWING AREAS WILL YOUR COMPANY'S 2008 CAPITAL EXPENDITURE PROGRAMS TARGET? FOR EACH CATEGORY, PLEASE INDICATE HOW MUCH, IF ANYTHING, YOUR COMPANY WILL SPEND.

	BUSINESS OUTLOOK CY 2008									
	NUMBER OF EMPLOYEES			BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
	TOTAL	1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
\$0	232 33.1%	125 37.1% B	107 29.4%	136 30.8%	96 36.9%	133 38.0% F	61 27.1%	38 30.2%	143 32.2%	89 34.6%
\$1 OR MORE (NET)	348 49.6%	166 49.3%	182 50.0%	234 53.1% D	114 43.8%	180 51.4% G	134 59.6% G	34 27.0%	236 53.2% I	112 43.6%
\$1 - \$50,000 (SUBNET)	270 38.5%	160 47.5% B	110 30.2%	192 43.5% D	78 30.0%	174 49.7% FG	69 30.7%	27 21.4%	187 42.1% I	83 32.3%
\$1 - \$10,000	210 30.0%	138 40.9% B	72 19.8%	138 31.3%	72 27.7%	153 43.7% FG	35 15.6%	22 17.5%	151 34.0% I	59 23.0%
&10,001 - \$50,000	60 8.6%	22 6.5%	38 10.4%	54 12.2% D	6 2.3%	21 6.0%	34 15.1% EG	5 4.0%	36 8.1%	24 9.3%
MORE THAN \$50,000 (SUBNET)	78 11.1%	6 1.8%	72 19.8% A	42 9.5%	36 13.8%	6 1.7%	65 28.9% EG	7 5.6%	49 11.0%	29 11.3%
\$50,001 - \$100,000	32 4.6%	4 1.2%	28 7.7% A	20 4.5%	12 4.6%	6 1.7%	24 10.7% EG	2 1.6%	21 4.7%	11 4.3%
MORE THAN \$100,000	46 6.6%	2 0.6%	44 12.1% A	22 5.0%	24 9.2% C	-	41 18.2% EG	5 4.0% E	28 6.3%	18 7.0%
DON'T KNOW/UNDECIDED	121 17.3%	46 13.6%	75 20.6% A	71 16.1%	50 19.2%	37 10.6%	30 13.3%	54 42.9% EF	65 14.6%	56 21.8% H

NOTE: MIDPOINT OF RANGES USED TO CALCULATE MEAN AND MEDIAN, ZERO EXCLUDED. \$200,000 USED FOR "MORE THAN \$100,000".

Table 18
 EXPECTED 2008 CAPITAL EXPENDITURES, BY CATEGORY: FINISHING

Q.9: WHICH OF THE FOLLOWING AREAS WILL YOUR COMPANY'S 2008 CAPITAL EXPENDITURE PROGRAMS TARGET? FOR EACH CATEGORY, PLEASE INDICATE HOW MUCH, IF ANYTHING, YOUR COMPANY WILL SPEND.

	NUMBER OF EMPLOYEES			BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
	TOTAL	1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
MEAN	\$ 41,523	\$ 12,349	\$ 68,132 A	\$ 35,085	\$ 54,737 C	\$ 10,250	\$ 83,545 EG	\$ 41,471 E	\$ 38,178	\$ 48,571
MEDIAN	\$ 5,001	\$ 5,000	\$ 30,000	\$ 5,001	\$ 5,001	\$ 5,000	\$ 30,001	\$ 5,001	\$ 5,001	\$ 5,001
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

NOTE: MIDPOINT OF RANGES USED TO CALCULATE MEAN AND MEDIAN, ZERO EXCLUDED. \$200,000 USED FOR "MORE THAN \$100,000".

Table 19
 EXPECTED 2008 CAPITAL EXPENDITURES, BY CATEGORY: LAMINATING

Q.9: WHICH OF THE FOLLOWING AREAS WILL YOUR COMPANY'S 2008 CAPITAL EXPENDITURE PROGRAMS TARGET? FOR EACH CATEGORY, PLEASE INDICATE HOW MUCH, IF ANYTHING, YOUR COMPANY WILL SPEND.

	BUSINESS OUTLOOK CY 2008									
	NUMBER OF EMPLOYEES			BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
	TOTAL	1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
\$0	409 58.3%	231 68.5%	178 48.9%	253 57.4%	156 60.0%	239 68.3%	115 51.1%	55 43.7%	265 59.7%	144 56.0%
\$1 OR MORE (NET)	160 22.8%	55 16.3%	105 28.8%	110 24.9%	50 19.2%	64 18.3%	76 33.8%	20 15.9%	102 23.0%	58 22.6%
\$1 - \$50,000 (SUBNET)	116 16.5%	51 15.1%	65 17.9%	85 19.3%	31 11.9%	64 18.3%	36 16.0%	16 12.7%	72 16.2%	44 17.1%
\$1 - \$10,000	92 13.1%	49 14.5%	43 11.8%	67 15.2%	25 9.6%	58 16.6%	20 8.9%	14 11.1%	61 13.7%	31 12.1%
&10,001 - \$50,000	24 3.4%	2 0.6%	22 6.0%	18 4.1%	6 2.3%	6 1.7%	16 7.1%	2 1.6%	11 2.5%	13 5.1%
MORE THAN \$50,000 (SUBNET)	44 6.3%	4 1.2%	40 11.0%	25 5.7%	19 7.3%	-	40 17.8%	4 3.2%	30 6.8%	14 5.4%
\$50,001 - \$100,000	11 1.6%	1 0.3%	10 2.7%	7 1.6%	4 1.5%	-	10 4.4%	1 0.8%	9 2.0%	2 0.8%
MORE THAN \$100,000	33 4.7%	3 0.9%	30 8.2%	18 4.1%	15 5.8%	-	30 13.3%	3 2.4%	21 4.7%	12 4.7%
DON'T KNOW/UNDECIDED	132 18.8%	51 15.1%	81 22.3%	78 17.7%	54 20.8%	47 13.4%	34 15.1%	51 40.5%	77 17.3%	55 21.4%

NOTE: MIDPOINT OF RANGES USED TO CALCULATE MEAN AND MEDIAN, ZERO EXCLUDED. \$200,000 USED FOR "MORE THAN \$100,000".

Table 19
 EXPECTED 2008 CAPITAL EXPENDITURES, BY CATEGORY: LAMINATING

Q.9: WHICH OF THE FOLLOWING AREAS WILL YOUR COMPANY'S 2008 CAPITAL EXPENDITURE PROGRAMS TARGET? FOR EACH CATEGORY, PLEASE INDICATE HOW MUCH, IF ANYTHING, YOUR COMPANY WILL SPEND.

	NUMBER OF EMPLOYEES			BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
	TOTAL	1-19	20+	OPTIMISTIC	PESSIMISTIC	\$100,000 OR LESS	MORE THAN \$100,000	DON'T KNOW/ UNDECIDED	IMPORTANT (6-5-4)	NOT IMPORTANT (3-2-1)
		(A)	(B)	(EXCELLENT/GOOD)	(FAIR/POOR/TERRIBLE)					
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
MEAN	\$ 53,781	\$ 17,818	\$ 72,619 A	\$ 45,455	\$ 72,100	\$ 7,344	\$ 96,447 EG	\$ 40,250 E	\$ 54,020	\$ 53,362
MEDIAN	\$ 5,001	\$ 5,000	\$ 30,000	\$ 5,001	\$ 17,500	\$ 5,000	\$ 74,999	\$ 5,000	\$ 5,001	\$ 5,001
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

NOTE: MIDPOINT OF RANGES USED TO CALCULATE MEAN AND MEDIAN, ZERO EXCLUDED. \$200,000 USED FOR "MORE THAN \$100,000".

Table 20
 EXPECTED 2008 CAPITAL EXPENDITURES, BY CATEGORY: PANEL PROCESSING

Q.9: WHICH OF THE FOLLOWING AREAS WILL YOUR COMPANY'S 2008 CAPITAL EXPENDITURE PROGRAMS TARGET? FOR EACH CATEGORY, PLEASE INDICATE HOW MUCH, IF ANYTHING, YOUR COMPANY WILL SPEND.

	BUSINESS OUTLOOK CY 2008									
	NUMBER OF EMPLOYEES			BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
	TOTAL	1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
\$0	327 46.6%	190 56.4%	137 37.6%	204 46.3%	123 47.3%	199 56.9%	80 35.6%	48 38.1%	211 47.5%	116 45.1%
			B			FG				
\$1 OR MORE (NET)	244 34.8%	93 27.6%	151 41.5%	160 36.3%	84 32.3%	104 29.7%	117 52.0%	23 18.3%	157 35.4%	87 33.9%
			A			G	EG			
\$1 - \$50,000 (SUBNET)	154 22.0%	81 24.0%	73 20.1%	108 24.5%	46 17.7%	94 26.9%	44 19.6%	16 12.7%	100 22.5%	54 21.0%
				D		FG				
\$1 - \$10,000	94 13.4%	63 18.7%	31 8.5%	68 15.4%	26 10.0%	64 18.3%	19 8.4%	11 8.7%	62 14.0%	32 12.5%
			B	D		FG				
&10,001 - \$50,000	60 8.6%	18 5.3%	42 11.5%	40 9.1%	20 7.7%	30 8.6%	25 11.1%	5 4.0%	38 8.6%	22 8.6%
			A			G	G			
MORE THAN \$50,000 (SUBNET)	90 12.8%	12 3.6%	78 21.4%	52 11.8%	38 14.6%	10 2.9%	73 32.4%	7 5.6%	57 12.8%	33 12.8%
			A				EG			
\$50,001 - \$100,000	34 4.9%	8 2.4%	26 7.1%	18 4.1%	16 6.2%	9 2.6%	23 10.2%	2 1.6%	19 4.3%	15 5.8%
			A				EG			
MORE THAN \$100,000	56 8.0%	4 1.2%	52 14.3%	34 7.7%	22 8.5%	1 0.3%	50 22.2%	5 4.0%	38 8.6%	18 7.0%
			A				EG	E		
DON'T KNOW/UNDECIDED	130 18.5%	54 16.0%	76 20.9%	77 17.5%	53 20.4%	47 13.4%	28 12.4%	55 43.7%	76 17.1%	54 21.0%
								EF		

NOTE: MIDPOINT OF RANGES USED TO CALCULATE MEAN AND MEDIAN, ZERO EXCLUDED. \$200,000 USED FOR "MORE THAN \$100,000".

Table 20
 EXPECTED 2008 CAPITAL EXPENDITURES, BY CATEGORY: PANEL PROCESSING

Q.9: WHICH OF THE FOLLOWING AREAS WILL YOUR COMPANY'S 2008 CAPITAL EXPENDITURE PROGRAMS TARGET? FOR EACH CATEGORY, PLEASE INDICATE HOW MUCH, IF ANYTHING, YOUR COMPANY WILL SPEND.

	NUMBER OF EMPLOYEES			BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
	TOTAL	1-19	20+	OPTIMISTIC	PESSIMISTIC	\$100,000 OR LESS	MORE THAN \$100,000	DON'T KNOW/ UNDECIDED	IMPORTANT (6-5-4)	NOT IMPORTANT (3-2-1)
		(A)	(B)	(EXCELLENT/GOOD)	(FAIR/POOR/TERRIBLE)					
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
MEAN	\$ 65,656	\$ 24,247	\$ 91,159 A	\$ 60,563	\$ 75,357	\$ 20,144	\$ 107,436 EG	\$ 58,913 E	\$ 66,720	\$ 63,736
MEDIAN	\$ 30,000	\$ 5,000	\$ 74,999	\$ 30,000	\$ 30,001	\$ 5,001	\$ 75,000	\$ 29,999	\$ 30,000	\$ 30,000
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

NOTE: MIDPOINT OF RANGES USED TO CALCULATE MEAN AND MEDIAN, ZERO EXCLUDED. \$200,000 USED FOR "MORE THAN \$100,000".

Table 21
 EXPECTED 2008 CAPITAL EXPENDITURES, BY CATEGORY: SOFTWARE

Q.9: WHICH OF THE FOLLOWING AREAS WILL YOUR COMPANY'S 2008 CAPITAL EXPENDITURE PROGRAMS TARGET? FOR EACH CATEGORY, PLEASE INDICATE HOW MUCH, IF ANYTHING, YOUR COMPANY WILL SPEND.

	BUSINESS OUTLOOK CY 2008									
	NUMBER OF EMPLOYEES			BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
	TOTAL	1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
\$0	165 23.5%	112 33.2% B	53 14.6%	97 22.0%	68 26.2%	118 33.7% FG	31 13.8%	16 12.7%	102 23.0%	63 24.5%
\$1 OR MORE (NET)	390 55.6%	166 49.3%	224 61.5% A	258 58.5% D	132 50.8%	183 52.3% G	162 72.0% EG	45 35.7%	260 58.6% I	130 50.6%
\$1 - \$50,000 (SUBNET)	327 46.6%	165 49.0%	162 44.5%	230 52.2% D	97 37.3%	182 52.0% G	105 46.7% G	40 31.7%	222 50.0% I	105 40.9%
\$1 - \$10,000	241 34.4%	147 43.6% B	94 25.8%	171 38.8% D	70 26.9%	163 46.6% FG	49 21.8%	29 23.0%	167 37.6% I	74 28.8%
&10,001 - \$50,000	86 12.3%	18 5.3%	68 18.7% A	59 13.4%	27 10.4%	19 5.4%	56 24.9% EG	11 8.7%	55 12.4%	31 12.1%
MORE THAN \$50,000 (SUBNET)	63 9.0%	1 0.3%	62 17.0% A	28 6.3%	35 13.5% C	1 0.3%	57 25.3% EG	5 4.0% E	38 8.6%	25 9.7%
\$50,001 - \$100,000	24 3.4%	-	24 6.6% A	7 1.6%	17 6.5% C	1 0.3%	22 9.8% EG	1 0.8%	12 2.7%	12 4.7%
MORE THAN \$100,000	39 5.6%	1 0.3%	38 10.4% A	21 4.8%	18 6.9%	-	35 15.6% EG	4 3.2% E	26 5.9%	13 5.1%
DON'T KNOW/UNDECIDED	146 20.8%	59 17.5%	87 23.9% A	86 19.5%	60 23.1%	49 14.0%	32 14.2%	65 51.6% EF	82 18.5%	64 24.9%

NOTE: MIDPOINT OF RANGES USED TO CALCULATE MEAN AND MEDIAN, ZERO EXCLUDED. \$200,000 USED FOR "MORE THAN \$100,000".

Table 21
 EXPECTED 2008 CAPITAL EXPENDITURES, BY CATEGORY: SOFTWARE

Q.9: WHICH OF THE FOLLOWING AREAS WILL YOUR COMPANY'S 2008 CAPITAL EXPENDITURE PROGRAMS TARGET? FOR EACH CATEGORY, PLEASE INDICATE HOW MUCH, IF ANYTHING, YOUR COMPANY WILL SPEND.

	NUMBER OF EMPLOYEES			BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
	TOTAL	1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
MEAN	\$ 34,321	\$ 8,886	\$ 53,170 A	\$ 28,488	\$ 45,720 C	\$ 7,978	\$ 65,278 EG	\$ 30,000 E	\$ 33,019	\$ 36,923
MEDIAN	\$ 5,001	\$ 5,000	\$ 30,000	\$ 5,001	\$ 5,001	\$ 5,000	\$ 30,000	\$ 5,001	\$ 5,001	\$ 5,001
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

NOTE: MIDPOINT OF RANGES USED TO CALCULATE MEAN AND MEDIAN, ZERO EXCLUDED. \$200,000 USED FOR "MORE THAN \$100,000".

Table 22
 EXPECTED 2008 CAPITAL EXPENDITURES, BY CATEGORY: SOLID WOOD MACHINERY

Q.9: WHICH OF THE FOLLOWING AREAS WILL YOUR COMPANY'S 2008 CAPITAL EXPENDITURE PROGRAMS TARGET? FOR EACH CATEGORY, PLEASE INDICATE HOW MUCH, IF ANYTHING, YOUR COMPANY WILL SPEND.

	BUSINESS OUTLOOK CY 2008									
	NUMBER OF EMPLOYEES			BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
	TOTAL	1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
\$0	201 28.7%	101 30.0%	100 27.5%	122 27.7%	79 30.4%	109 31.1%	60 26.7%	32 25.4%	112 25.2%	89 34.6% H
\$1 OR MORE (NET)	366 52.2%	189 56.1% B	177 48.6%	238 54.0%	128 49.2%	197 56.3% G	134 59.6% G	35 27.8%	254 57.2% I	112 43.6%
\$1 - \$50,000 (SUBNET)	265 37.8%	172 51.0% B	93 25.5%	176 39.9%	89 34.2%	184 52.6% FG	56 24.9%	25 19.8%	183 41.2% I	82 31.9%
\$1 - \$10,000	189 27.0%	144 42.7% B	45 12.4%	125 28.3%	64 24.6%	156 44.6% FG	15 6.7%	18 14.3% F	131 29.5% I	58 22.6%
&10,001 - \$50,000	76 10.8%	28 8.3%	48 13.2% A	51 11.6%	25 9.6%	28 8.0%	41 18.2% EG	7 5.6%	52 11.7%	24 9.3%
MORE THAN \$50,000 (SUBNET)	101 14.4%	17 5.0%	84 23.1% A	62 14.1%	39 15.0%	13 3.7%	78 34.7% EG	10 7.9%	71 16.0%	30 11.7%
\$50,001 - \$100,000	46 6.6%	14 4.2%	32 8.8% A	34 7.7%	12 4.6%	12 3.4%	30 13.3% EG	4 3.2%	28 6.3%	18 7.0%
MORE THAN \$100,000	55 7.8%	3 0.9%	52 14.3% A	28 6.3%	27 10.4%	1 0.3%	48 21.3% EG	6 4.8% E	43 9.7% I	12 4.7%
DON'T KNOW/UNDECIDED	134 19.1%	47 13.9%	87 23.9% A	81 18.4%	53 20.4%	44 12.6%	31 13.8%	59 46.8% EF	78 17.6%	56 21.8%

NOTE: MIDPOINT OF RANGES USED TO CALCULATE MEAN AND MEDIAN, ZERO EXCLUDED. \$200,000 USED FOR "MORE THAN \$100,000".

Table 22
 EXPECTED 2008 CAPITAL EXPENDITURES, BY CATEGORY: SOLID WOOD MACHINERY

Q.9: WHICH OF THE FOLLOWING AREAS WILL YOUR COMPANY'S 2008 CAPITAL EXPENDITURE PROGRAMS TARGET? FOR EACH CATEGORY, PLEASE INDICATE HOW MUCH, IF ANYTHING, YOUR COMPANY WILL SPEND.

	NUMBER OF EMPLOYEES			BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
	TOTAL	1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
MEAN	\$ 48,292	\$ 16,984	\$ 81,723 A	\$ 43,298	\$ 57,578	\$ 13,807	\$ 98,172 EG	\$ 51,429 E	\$ 50,846	\$ 42,500
MEDIAN	\$ 5,001	\$ 5,000	\$ 30,001	\$ 5,001	\$ 17,500	\$ 5,000	\$ 75,000	\$ 5,001	\$ 5,001	\$ 5,001
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

NOTE: MIDPOINT OF RANGES USED TO CALCULATE MEAN AND MEDIAN, ZERO EXCLUDED. \$200,000 USED FOR "MORE THAN \$100,000".

Table 23
 EXPECTED 2008 CAPITAL EXPENDITURES, BY CATEGORY: VENERRING

Q.9: WHICH OF THE FOLLOWING AREAS WILL YOUR COMPANY'S 2008 CAPITAL EXPENDITURE PROGRAMS TARGET? FOR EACH CATEGORY, PLEASE INDICATE HOW MUCH, IF ANYTHING, YOUR COMPANY WILL SPEND.

	BUSINESS OUTLOOK CY 2008									
	NUMBER OF EMPLOYEES			BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
	TOTAL	1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
\$0	440 62.8%	234 69.4%	206 56.6%	277 62.8%	163 62.7%	244 69.7%	128 56.9%	68 54.0%	290 65.3%	150 58.4%
		B				FG				
\$1 OR MORE (NET)	133 19.0%	54 16.0%	79 21.7%	87 19.7%	46 17.7%	61 17.4%	59 26.2%	13 10.3%	81 18.2%	52 20.2%
						G	EG			
\$1 - \$50,000 (SUBNET)	107 15.3%	53 15.7%	54 14.8%	69 15.6%	38 14.6%	61 17.4%	35 15.6%	11 8.7%	64 14.4%	43 16.7%
						G				
\$1 - \$10,000	85 12.1%	49 14.5%	36 9.9%	54 12.2%	31 11.9%	56 16.0%	21 9.3%	8 6.3%	53 11.9%	32 12.5%
						FG				
&10,001 - \$50,000	22 3.1%	4 1.2%	18 4.9%	15 3.4%	7 2.7%	5 1.4%	14 6.2%	3 2.4%	11 2.5%	11 4.3%
			A				E			
MORE THAN \$50,000 (SUBNET)	26 3.7%	1 0.3%	25 6.9%	18 4.1%	8 3.1%	-	24 10.7%	2 1.6%	17 3.8%	9 3.5%
			A				EG			
\$50,001 - \$100,000	6 0.9%	1 0.3%	5 1.4%	4 0.9%	2 0.8%	-	6 2.7%	-	3 0.7%	3 1.2%
							EG			
MORE THAN \$100,000	20 2.9%	-	20 5.5%	14 3.2%	6 2.3%	-	18 8.0%	2 1.6%	14 3.2%	6 2.3%
			A				EG			
DON'T KNOW/UNDECIDED	128 18.3%	49 14.5%	79 21.7%	77 17.5%	51 19.6%	45 12.9%	38 16.9%	45 35.7%	73 16.4%	55 21.4%
			A					EF		

NOTE: MIDPOINT OF RANGES USED TO CALCULATE MEAN AND MEDIAN, ZERO EXCLUDED. \$200,000 USED FOR "MORE THAN \$100,000".

Table 23
 EXPECTED 2008 CAPITAL EXPENDITURES, BY CATEGORY: VENERRING

Q.9: WHICH OF THE FOLLOWING AREAS WILL YOUR COMPANY'S 2008 CAPITAL EXPENDITURE PROGRAMS TARGET? FOR EACH CATEGORY, PLEASE INDICATE HOW MUCH, IF ANYTHING, YOUR COMPANY WILL SPEND.

	NUMBER OF EMPLOYEES			BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
	TOTAL	1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
MEAN	\$ 41,617	\$ 8,148	\$ 64,494 A	\$ 43,908	\$ 37,283	\$ 7,049	\$ 77,542 E	\$ 40,769	\$ 44,691	\$ 36,827
MEDIAN	\$ 5,001	\$ 5,000	\$ 29,999	\$ 5,001	\$ 5,000	\$ 5,000	\$ 30,000	\$ 5,001	\$ 5,001	\$ 5,001
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

NOTE: MIDPOINT OF RANGES USED TO CALCULATE MEAN AND MEDIAN, ZERO EXCLUDED. \$200,000 USED FOR "MORE THAN \$100,000".

Table 24
 EXPECTED 2008 CAPITAL EXPENDITURES, BY CATEGORY: WOOD WASTE MANAGEMENT

Q.9: WHICH OF THE FOLLOWING AREAS WILL YOUR COMPANY'S 2008 CAPITAL EXPENDITURE PROGRAMS TARGET? FOR EACH CATEGORY, PLEASE INDICATE HOW MUCH, IF ANYTHING, YOUR COMPANY WILL SPEND.

	BUSINESS OUTLOOK CY 2008									
	TOTAL	NUMBER OF EMPLOYEES		OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
		1-19 (A)	20+ (B)			\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
\$0	357 50.9%	230 68.2%	127 34.9%	231 52.4%	126 48.5%	238 68.0%	73 32.4%	46 36.5%	221 49.8%	136 52.9%
\$1 OR MORE (NET)	193 27.5%	48 14.2%	145 39.8%	123 27.9%	70 26.9%	58 16.6%	111 49.3%	24 19.0%	130 29.3%	63 24.5%
\$1 - \$50,000 (SUBNET)	153 21.8%	46 13.6%	107 29.4%	105 23.8%	48 18.5%	58 16.6%	77 34.2%	18 14.3%	99 22.3%	54 21.0%
\$1 - \$10,000	101 14.4%	36 10.7%	65 17.9%	72 16.3%	29 11.2%	47 13.4%	43 19.1%	11 8.7%	73 16.4%	28 10.9%
&10,001 - \$50,000	52 7.4%	10 3.0%	42 11.5%	33 7.5%	19 7.3%	11 3.1%	34 15.1%	7 5.6%	26 5.9%	26 10.1%
MORE THAN \$50,000 (SUBNET)	40 5.7%	2 0.6%	38 10.4%	18 4.1%	22 8.5%	-	34 15.1%	6 4.8%	31 7.0%	9 3.5%
\$50,001 - \$100,000	15 2.1%	-	15 4.1%	9 2.0%	6 2.3%	-	13 5.8%	2 1.6%	13 2.9%	2 0.8%
MORE THAN \$100,000	25 3.6%	2 0.6%	23 6.3%	9 2.0%	16 6.2%	-	21 9.3%	4 3.2%	18 4.1%	7 2.7%
DON'T KNOW/UNDECIDED	151 21.5%	59 17.5%	92 25.3%	87 19.7%	64 24.6%	54 15.4%	41 18.2%	56 44.4%	93 20.9%	58 22.6%

NOTE: MIDPOINT OF RANGES USED TO CALCULATE MEAN AND MEDIAN, ZERO EXCLUDED. \$200,000 USED FOR "MORE THAN \$100,000".

Table 24
 EXPECTED 2008 CAPITAL EXPENDITURES, BY CATEGORY: WOOD WASTE MANAGEMENT

Q.9: WHICH OF THE FOLLOWING AREAS WILL YOUR COMPANY'S 2008 CAPITAL EXPENDITURE PROGRAMS TARGET? FOR EACH CATEGORY, PLEASE INDICATE HOW MUCH, IF ANYTHING, YOUR COMPANY WILL SPEND.

	NUMBER OF EMPLOYEES			BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
	TOTAL	1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
MEAN	\$ 42,435	\$ 18,333	\$ 50,414 A	\$ 31,098	\$ 62,357 C	\$ 9,741	\$ 57,748 E	\$ 50,625 E	\$ 44,000	\$ 39,206
MEDIAN	\$ 5,001	\$ 5,000	\$ 29,999	\$ 5,001	\$ 30,000	\$ 5,000	\$ 30,000	\$ 29,999	\$ 5,001	\$ 29,999
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

NOTE: MIDPOINT OF RANGES USED TO CALCULATE MEAN AND MEDIAN, ZERO EXCLUDED. \$200,000 USED FOR "MORE THAN \$100,000".

Table 25
IMPORTANCE OF COUNTRY-OF-ORIGIN

Q.10: HOW IMPORTANT IS THE COUNTRY-OF-ORIGIN (WHERE A PIECE OF EQUIPMENT WAS MANUFACTURED) TO YOUR ULTIMATE EQUIPMENT PURCHASING DECISION? USE A 6-POINT SCALE WHERE 6 = EXTREMELY IMPORTANT AND 1 = NOT AT ALL IMPORTANT.

	NUMBER OF EMPLOYEES			BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
	TOTAL	1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
TOP 2 BOX (NET)	244 34.8%	124 36.8%	120 33.0%	159 36.1%	85 32.7%	118 33.7%	78 34.7%	48 38.1%	244 55.0% I	-
6 (EXTREMELY IMPORTANT)	90 12.8%	47 13.9%	43 11.8%	58 13.2%	32 12.3%	43 12.3%	31 13.8%	16 12.7%	90 20.3% I	-
5	154 22.0%	77 22.8%	77 21.2%	101 22.9%	53 20.4%	75 21.4%	47 20.9%	32 25.4%	154 34.7% I	-
4	200 28.5%	96 28.5%	104 28.6%	129 29.3%	71 27.3%	106 30.3%	60 26.7%	34 27.0%	200 45.0% I	-
3	111 15.8%	48 14.2%	63 17.3%	68 15.4%	43 16.5%	55 15.7%	38 16.9%	18 14.3%	-	111 43.2% H
BOTTOM 2 BOX (NET)	146 20.8%	69 20.5%	77 21.2%	85 19.3%	61 23.5%	71 20.3%	49 21.8%	26 20.6%	-	146 56.8% H
2	43 6.1%	20 5.9%	23 6.3%	26 5.9%	17 6.5%	24 6.9% G	16 7.1% G	3 2.4%	-	43 16.7% H
1 (NOT AT ALL IMPORTANT)	103 14.7%	49 14.5%	54 14.8%	59 13.4%	44 16.9%	47 13.4%	33 14.7%	23 18.3%	-	103 40.1% H
MEAN	3.8	3.8	3.7	3.8	3.6	3.8	3.7	3.8	4.8 I	2.0
MEDIAN	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0	5.0	2.0
MODE	4	4	4	4	4	4	4	4	4	3
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 26
MACHINERY/EQUIPMENT HAVE/INTEND TO BUY 2008

Q.11: WHAT TYPES OF MACHINERY/EQUIPMENT, IF ANY, HAVE YOU ALREADY BOUGHT IN 2008 OR ARE YOU PLANNING TO BUY IN 2008?

	TOTAL	NUMBER OF EMPLOYEES		BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
		1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
		-----	-----	-----	-----	-----	-----	-----	-----	-----
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
HAVE/INTEND TO PURCHASE IN 2008 (NET)	550 78.5%	249 73.9%	301 82.7%	356 80.7%	194 74.6%	266 76.0%	212 94.2%	72 57.1%	357 80.4%	193 75.1%
-----			A			G	EG			
COMPUTER SOFTWARE	201 28.7%	74 22.0%	127 34.9%	129 29.3%	72 27.7%	84 24.0%	97 43.1%	20 15.9%	121 27.3%	80 31.1%
			A			G	EG			
DUST COLLECTION EQUIPMENT	181 25.8%	85 25.2%	96 26.4%	121 27.4%	60 23.1%	81 23.1%	82 36.4%	18 14.3%	114 25.7%	67 26.1%
						G	EG			
SANDING EQUIPMENT	175 25.0%	89 26.4%	86 23.6%	119 27.0%	56 21.5%	93 26.6%	67 29.8%	15 11.9%	114 25.7%	61 23.7%
						G	G			
SPRAY EQUIPMENT	154 22.0%	66 19.6%	88 24.2%	105 23.8%	49 18.8%	67 19.1%	73 32.4%	14 11.1%	97 21.8%	57 22.2%
						G	EG			
MATERIAL HANDLING	114 16.3%	24 7.1%	90 24.7%	63 14.3%	51 19.6%	35 10.0%	66 29.3%	13 10.3%	77 17.3%	37 14.4%
			A				EG			
CNC ROUTER	99 14.1%	38 11.3%	61 16.8%	74 16.8%	25 9.6%	35 10.0%	47 20.9%	17 13.5%	63 14.2%	36 14.0%
			A	D			E			
SPRAY BOOTH	97 13.8%	39 11.6%	58 15.9%	64 14.5%	33 12.7%	42 12.0%	46 20.4%	9 7.1%	63 14.2%	34 13.2%
							EG			
EDGE BANDER	72 10.3%	30 8.9%	42 11.5%	46 10.4%	26 10.0%	30 8.6%	30 13.3%	12 9.5%	50 11.3%	22 8.6%

NOTE: THIS WAS A REQUIRED QUESTION, HOWEVER SOME WRITE-INS FOR "OTHER" WERE DETERMINED TO BE OUTSIDE THE RANGE OF RELEVANT RESPONSES AND WERE REMOVED, AND THUS BECAME "NO RESPONSE" TO THE QUESTION.

Table 26
MACHINERY/EQUIPMENT HAVE/INTEND TO BUY 2008

Q.11: WHAT TYPES OF MACHINERY/EQUIPMENT, IF ANY, HAVE YOU ALREADY BOUGHT IN 2008 OR ARE YOU PLANNING TO BUY IN 2008?

	TOTAL	NUMBER OF EMPLOYEES		BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
		1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
		-----	-----	-----	-----	-----	-----	-----	-----	-----
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
CNC MACHINING CENTER	70 10.0%	15 4.5%	55 15.1% A	57 12.9% D	13 5.0%	16 4.6%	42 18.7% EG	12 9.5%	48 10.8%	22 8.6%
CUT-OFF SAW	64 9.1%	26 7.7%	38 10.4%	35 7.9%	29 11.2%	30 8.6%	23 10.2%	11 8.7%	40 9.0%	24 9.3%
SHAPER	64 9.1%	39 11.6% B	25 6.9%	46 10.4%	18 6.9%	37 10.6% G	21 9.3%	6 4.8%	44 9.9%	20 7.8%
BANDSAW	60 8.6%	37 11.0% B	23 6.3%	40 9.1%	20 7.7%	38 10.9% G	18 8.0% G	4 3.2%	34 7.7%	26 10.1%
LAMINATING EQUIPMENT	59 8.4%	15 4.5%	44 12.1% A	35 7.9%	24 9.2%	19 5.4%	35 15.6% EG	5 4.0%	31 7.0%	28 10.9%
PACKAGING EQUIPMENT	58 8.3%	6 1.8%	52 14.3% A	33 7.5%	25 9.6%	13 3.7%	38 16.9% EG	7 5.6%	37 8.3%	21 8.2%
MOULDER	56 8.0%	26 7.7%	30 8.2%	33 7.5%	23 8.8%	26 7.4%	25 11.1% G	5 4.0%	44 9.9% I	12 4.7%
BORING MACHINE	55 7.8%	18 5.3%	37 10.2% A	35 7.9%	20 7.7%	22 6.3%	26 11.6% EG	7 5.6%	35 7.9%	20 7.8%
PANEL SAW	52 7.4%	16 4.7%	36 9.9% A	33 7.5%	19 7.3%	17 4.9%	28 12.4% EG	7 5.6%	31 7.0%	21 8.2%

NOTE: THIS WAS A REQUIRED QUESTION, HOWEVER SOME WRITE-INS FOR "OTHER" WERE DETERMINED TO BE OUTSIDE THE RANGE OF RELEVANT RESPONSES AND WERE REMOVED, AND THUS BECAME "NO RESPONSE" TO THE QUESTION.

Table 26
MACHINERY/EQUIPMENT HAVE/INTEND TO BUY 2008

Q.11: WHAT TYPES OF MACHINERY/EQUIPMENT, IF ANY, HAVE YOU ALREADY BOUGHT IN 2008 OR ARE YOU PLANNING TO BUY IN 2008?

	TOTAL	NUMBER OF EMPLOYEES		BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
		1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
		-----	-----	-----	-----	-----	-----	-----	-----	-----
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
DOOR MANUFACTURING EQUIPMENT	49 7.0%	19 5.6%	30 8.2%	33 7.5%	16 6.2%	20 5.7%	24 10.7% EG	5 4.0%	31 7.0%	18 7.0%
PLANER	49 7.0%	31 9.2% B	18 4.9%	30 6.8%	19 7.3%	25 7.1%	16 7.1%	8 6.3%	32 7.2%	17 6.6%
RIPSAW	49 7.0%	18 5.3%	31 8.5%	24 5.4%	25 9.6%	20 5.7%	23 10.2%	6 4.8%	36 8.1%	13 5.1%
ASSEMBLY MACHINE/SYSTEM	48 6.8%	14 4.2%	34 9.3% A	32 7.3%	16 6.2%	16 4.6%	26 11.6% EG	6 4.8%	29 6.5%	19 7.4%
POCKET HOLE MACHINERY	48 6.8%	36 10.7% B	12 3.3%	33 7.5%	15 5.8%	37 10.6% FG	9 4.0%	2 1.6%	35 7.9%	13 5.1%
VENEERING EQUIPMENT	43 6.1%	21 6.2%	22 6.0%	32 7.3%	11 4.2%	19 5.4%	21 9.3% G	3 2.4%	26 5.9%	17 6.6%
DOVETAIL MACHINE	42 6.0%	24 7.1%	18 4.9%	26 5.9%	16 6.2%	25 7.1%	13 5.8%	4 3.2%	27 6.1%	15 5.8%
WOOD SCRAP GRINDER	42 6.0%	9 2.7%	33 9.1% A	25 5.7%	17 6.5%	9 2.6%	29 12.9% EG	4 3.2%	27 6.1%	15 5.8%
GLUE SPREADER	38 5.4%	9 2.7%	29 8.0% A	22 5.0%	16 6.2%	12 3.4%	22 9.8% EG	4 3.2%	20 4.5%	18 7.0%
CASE CLAMP	33 4.7%	16 4.7%	17 4.7%	22 5.0%	11 4.2%	22 6.3%	7 3.1%	4 3.2%	21 4.7%	12 4.7%

NOTE: THIS WAS A REQUIRED QUESTION, HOWEVER SOME WRITE-INS FOR "OTHER" WERE DETERMINED TO BE OUTSIDE THE RANGE OF RELEVANT RESPONSES AND WERE REMOVED, AND THUS BECAME "NO RESPONSE" TO THE QUESTION.

Table 26
MACHINERY/EQUIPMENT HAVE/INTEND TO BUY 2008

Q.11: WHAT TYPES OF MACHINERY/EQUIPMENT, IF ANY, HAVE YOU ALREADY BOUGHT IN 2008 OR ARE YOU PLANNING TO BUY IN 2008?

	TOTAL	NUMBER OF EMPLOYEES		BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
		1-19	20+	OPTIMISTIC	PESSIMISTIC	\$100,000 OR	MORE THAN	DON'T KNOW/	IMPORTANT	NOT
		(A)	(B)	(EXCELLENT/ GOOD) (C)	(FAIR/POOR/ TERRIBLE) (D)	LESS (E)	\$100,000 (F)	UNDECIDED (G)	(6-5-4) (H)	(3-2-1) (I)
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
FLAT LINE FINISHING EQUIPMENT	32 4.6%	5 1.5%	27 7.4% A	16 3.6%	16 6.2%	8 2.3%	22 9.8% EG	2 1.6%	16 3.6%	16 6.2%
CLAMP CARRIER	27 3.9%	15 4.5%	12 3.3%	18 4.1%	9 3.5%	16 4.6% G	10 4.4% G	1 0.8%	20 4.5%	7 2.7%
PROFILING MACHINE	20 2.9%	8 2.4%	12 3.3%	11 2.5%	9 3.5%	8 2.3%	9 4.0%	3 2.4%	14 3.2%	6 2.3%
FINGERJOINT MACHINE	18 2.6%	3 0.9%	15 4.1% A	10 2.3%	8 3.1%	6 1.7%	8 3.6%	4 3.2%	13 2.9%	5 1.9%
DRY KILN	10 1.4%	4 1.2%	6 1.6%	4 0.9%	6 2.3%	4 1.1% G	6 2.7% G	-	9 2.0% I	1 0.4%
OTHER	50 7.1%	22 6.5%	28 7.7%	29 6.6%	21 8.1%	27 7.7% G	20 8.9% G	3 2.4%	30 6.8%	20 7.8%
DO NOT INTEND TO BUY MACHINERY/EQUIPMENT IN 2008	133 19.0%	78 23.1% B	55 15.1%	74 16.8%	59 22.7%	77 22.0% F	10 4.4%	46 36.5% EF	76 17.1%	57 22.2%
NO RESPONSE	18 2.6%	10 3.0%	8 2.2%	11 2.5%	7 2.7%	7 2.0%	3 1.3%	8 6.3% F	11 2.5%	7 2.7%
SIGMA	339.5%	292.3%	383.2%	344.7%	330.8%	298.0%	463.1%	234.1%	341.4%	336.2%

NOTE: THIS WAS A REQUIRED QUESTION, HOWEVER SOME WRITE-INS FOR "OTHER" WERE DETERMINED TO BE OUTSIDE THE RANGE OF RELEVANT RESPONSES AND WERE REMOVED, AND THUS BECAME "NO RESPONSE" TO THE QUESTION.

Table 27
FINANCING

Q.12: WHICH OF THE FOLLOWING DID YOU USE TO PAY FOR MAJOR WOODWORKING EQUIPMENT PURCHASES OF \$10,000 OR MORE DURING THE PAST 3 YEARS?

	TOTAL	NUMBER OF EMPLOYEES		BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
		1-19	20+	OPTIMISTIC	PESSIMISTIC	\$100,000 OR	MORE THAN	DON'T KNOW/	IMPORTANT	NOT
		(A)	(B)	(EXCELLENT/ GOOD) (C)	(FAIR/POOR/ TERRIBLE) (D)	LESS (E)	\$100,000 (F)	UNDECIDED (G)	(6-5-4) (H)	IMPORTANT (3-2-1) (I)
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
REPORTED METHODS TO PAY FOR EQUIPMENT OF \$10,000 OR MORE IN PAST 3 YEARS (NET)	559 79.7%	237 70.3%	322 88.5% A	359 81.4%	200 76.9%	262 74.9% G	215 95.6% EG	82 65.1%	358 80.6%	201 78.2%
CASH	352 50.2%	165 49.0%	187 51.4%	216 49.0%	136 52.3%	168 48.0% G	143 63.6% EG	41 32.5%	230 51.8%	122 47.5%
NON-CASH PURCHASE (NET)	281 40.1%	102 30.3%	179 49.2% A	187 42.4%	94 36.2%	125 35.7%	103 45.8% E	53 42.1%	181 40.8%	100 38.9%
LEASE/PURCHASE	167 23.8%	60 17.8%	107 29.4% A	114 25.9%	53 20.4%	72 20.6%	62 27.6%	33 26.2%	100 22.5%	67 26.1%
BANK LOAN	147 21.0%	55 16.3%	92 25.3% A	96 21.8%	51 19.6%	67 19.1%	55 24.4%	25 19.8%	100 22.5%	47 18.3%
DID NOT PURCHASE EQUIPMENT FOR \$10,000 OR MORE IN PAST 3 YEARS	142 20.3%	100 29.7% B	42 11.5%	82 18.6%	60 23.1%	88 25.1% F	10 4.4%	44 34.9% EF	86 19.4%	56 21.8%
SIGMA	115.3%	112.8%	117.6%	115.2%	115.4%	112.9%	120.0%	113.5%	116.2%	113.6%

Table 28
 WHETHER USED U.S. FEDERAL TAX INCENTIVES TO PURCHASE EQUIPMENT (SUMMARY)

Q.12A: HAS YOUR COMPANY EVER TAKEN ADVANTAGE OF THE FOLLOWING U.S. FEDERAL TAX INCENTIVES TO PURCHASE EQUIPMENT?

* BASED ON COMPANIES LOCATED IN THE U.S. *

	TOTAL	YES	NO	NOT SURE	NOT FAMILIAR
	-----	-----	-----	-----	-----
DIRECT EXPENSING	615 100.0%	197 32.0%	136 22.1%	178 28.9%	104 16.9%
DEPRECIATION BONUS	615 100.0%	197 32.0%	154 25.0%	165 26.8%	99 16.1%

NOTE: SIGNIFICANCE TESTING NOT EMPLOYED DUE TO USE OF HORIZONTAL PERCENTAGES.

Table 29
 WHETHER USED U.S. FEDERAL TAX INCENTIVES TO PURCHASE EQUIPMENT: DIRECT EXPENSING

Q.12A: HAS YOUR COMPANY EVER TAKEN ADVANTAGE OF THE FOLLOWING U.S. FEDERAL TAX INCENTIVES TO PURCHASE EQUIPMENT?

* BASED ON COMPANIES LOCATED IN THE U.S. *

	TOTAL	NUMBER OF EMPLOYEES		BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
		1-19	20+	OPTIMISTIC	PESSIMISTIC	\$100,000 OR	MORE THAN	DON'T KNOW/	IMPORTANT	NOT
		(A)	(B)	(EXCELLENT/ GOOD) (C)	(FAIR/POOR/ TERRIBLE) (D)	LESS (E)	\$100,000 (F)	UNDECIDED (G)	(6-5-4) (H)	IMPORTANT (3-2-1) (I)
BASE	615 100.0%	312 100.0%	303 100.0%	382 100.0%	233 100.0%	322 100.0%	178 100.0%	115 100.0%	390 100.0%	225 100.0%
YES	197 32.0%	108 34.6%	89 29.4%	118 30.9%	79 33.9%	116 36.0% G	61 34.3% G	20 17.4%	127 32.6%	70 31.1%
NO	136 22.1%	101 32.4% B	35 11.6%	86 22.5%	50 21.5%	96 29.8% FG	18 10.1%	22 19.1% F	89 22.8%	47 20.9%
NOT SURE	178 28.9%	60 19.2%	118 38.9% A	121 31.7%	57 24.5%	67 20.8%	69 38.8% E	42 36.5% E	112 28.7%	66 29.3%
NOT FAMILIAR	104 16.9%	43 13.8%	61 20.1% A	57 14.9%	47 20.2%	43 13.4%	30 16.9%	31 27.0% EF	62 15.9%	42 18.7%
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 30
 WHETHER USED U.S. FEDERAL TAX INCENTIVES TO PURCHASE EQUIPMENT: DEPRECIATION BONUS

Q.12A: HAS YOUR COMPANY EVER TAKEN ADVANTAGE OF THE FOLLOWING U.S. FEDERAL TAX INCENTIVES TO PURCHASE EQUIPMENT?

* BASED ON COMPANIES LOCATED IN THE U.S. *

	TOTAL	NUMBER OF EMPLOYEES		BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
		1-19	20+	OPTIMISTIC	PESSIMISTIC	\$100,000 OR	MORE THAN	DON'T KNOW/	IMPORTANT	NOT
		(A)	(B)	(EXCELLENT/ GOOD) (C)	(FAIR/POOR/ TERRIBLE) (D)	LESS (E)	\$100,000 (F)	UNDECIDED (G)	(6-5-4) (H)	IMPORTANT (3-2-1) (I)
BASE	615 100.0%	312 100.0%	303 100.0%	382 100.0%	233 100.0%	322 100.0%	178 100.0%	115 100.0%	390 100.0%	225 100.0%
YES	197 32.0%	96 30.8%	101 33.3%	114 29.8%	83 35.6%	103 32.0% G	68 38.2% G	26 22.6%	126 32.3%	71 31.6%
NO	154 25.0%	113 36.2% B	41 13.5%	91 23.8%	63 27.0%	110 34.2% FG	20 11.2%	24 20.9% F	101 25.9%	53 23.6%
NOT SURE	165 26.8%	57 18.3%	108 35.6% A	119 31.2% D	46 19.7%	65 20.2%	64 36.0% E	36 31.3% E	99 25.4%	66 29.3%
NOT FAMILIAR	99 16.1%	46 14.7%	53 17.5%	58 15.2%	41 17.6%	44 13.7%	26 14.6%	29 25.2% EF	64 16.4%	35 15.6%
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 31
 WHETHER PLAN TO USE U.S. FEDERAL STIMULUS PACKAGE TO PURCHASE EQUIPMENT IN 2008

Q.12B: WILL YOUR COMPANY TAKE ADVANTAGE OF EITHER OF THESE INCENTIVES (DIRECT EXPENSING/DEPRECIATION BONUS) OFFERED IN THE 2008 U.S. FEDERAL STIMULUS PACKAGE TO PURCHASE EQUIPMENT THIS YEAR?

* BASED ON COMPANIES LOCATED IN THE U.S. *

	BUSINESS OUTLOOK CY 2008									
	TOTAL	NUMBER OF EMPLOYEES		OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
		1-19 (A)	20+ (B)			\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
BASE	615 100.0%	312 100.0%	303 100.0%	382 100.0%	233 100.0%	322 100.0%	178 100.0%	115 100.0%	390 100.0%	225 100.0%
YES	130 21.1%	64 20.5%	66 21.8%	87 22.8%	43 18.5%	66 20.5% G	53 29.8% EG	11 9.6%	83 21.3%	47 20.9%
NO	129 21.0%	88 28.2% B	41 13.5%	71 18.6%	58 24.9%	88 27.3% FG	21 11.8%	20 17.4%	78 20.0%	51 22.7%
NOT SURE	285 46.3%	127 40.7%	158 52.1% A	176 46.1%	109 46.8%	135 41.9%	84 47.2%	66 57.4% E	182 46.7%	103 45.8%
NOT FAMILIAR	71 11.5%	33 10.6%	38 12.5%	48 12.6%	23 9.9%	33 10.2%	20 11.2%	18 15.7%	47 12.1%	24 10.7%
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 32
 VALUE OF INDUSTRY RESOURCES WHEN PURCHASING WOODWORKING EQUIPMENT (SUMMARY)

Q.13A: PLEASE RATE THE VALUE OF EACH OF THE FOLLOWING INDUSTRY RESOURCES FOR FINDING INFORMATION ABOUT MANUFACTURERS OF WOODWORKING EQUIPMENT DURING AN EQUIPMENT PURCHASE PROCESS. USE A 6-POINT SCALE WHERE 6 = EXTREMELY VALUABLE AND 1 = NOT AT ALL VALUABLE.

	TOTAL	TOP 2 BOX (NET)	6 (EXTREMELY VALUABLE)	5	4	3	BOTTOM 2 BOX (NET)	2	1 (NOT AT ALL VALUABLE)
	-----	-----	-----	-----	-----	-----	-----	-----	-----
COMPANY LITERATURE	701 100.0%	326 46.5%	95 13.6%	231 33.0%	219 31.2%	103 14.7%	53 7.6%	33 4.7%	20 2.9%
INTERNET	701 100.0%	458 65.3%	235 33.5%	223 31.8%	137 19.5%	63 9.0%	43 6.1%	28 4.0%	15 2.1%
LOCAL DISTRIBUTOR/SALES REP	701 100.0%	371 52.9%	147 21.0%	224 32.0%	164 23.4%	89 12.7%	77 11.0%	46 6.6%	31 4.4%
TRADE PUBLICATION	701 100.0%	324 46.2%	99 14.1%	225 32.1%	214 30.5%	103 14.7%	60 8.6%	45 6.4%	15 2.1%
TRADESHOWS	701 100.0%	530 75.6%	267 38.1%	263 37.5%	105 15.0%	42 6.0%	24 3.4%	13 1.9%	11 1.6%

NOTE: SIGNIFICANCE TESTING NOT EMPLOYED DUE TO USE OF HORIZONTAL PERCENTAGES.

Table 33
 VALUE OF INDUSTRY RESOURCES WHEN PURCHASING WOODWORKING EQUIPMENT: TOP BOX SUMMARY

Q.13A: PLEASE RATE THE VALUE OF EACH OF THE FOLLOWING INDUSTRY RESOURCES FOR FINDING INFORMATION ABOUT MANUFACTURERS OF WOODWORKING EQUIPMENT DURING AN EQUIPMENT PURCHASE PROCESS. USE A 6-POINT SCALE WHERE 6 = EXTREMELY VALUABLE AND 1 = NOT AT ALL VALUABLE.

	NUMBER OF EMPLOYEES		BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN		
	TOTAL	1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
TRADESHOWS	267 38.1%	148 43.9% B	119 32.7%	175 39.7%	92 35.4%	138 39.4%	81 36.0%	48 38.1%	181 40.8%	86 33.5%
INTERNET	235 33.5%	120 35.6%	115 31.6%	154 34.9%	81 31.2%	114 32.6%	73 32.4%	48 38.1%	148 33.3%	87 33.9%
LOCAL DISTRIBUTOR/SALES REP	147 21.0%	73 21.7%	74 20.3%	91 20.6%	56 21.5%	62 17.7%	54 24.0%	31 24.6%	90 20.3%	57 22.2%
TRADE PUBLICATION	99 14.1%	68 20.2% B	31 8.5%	66 15.0%	33 12.7%	61 17.4% G	27 12.0%	11 8.7%	69 15.5%	30 11.7%
COMPANY LITERATURE	95 13.6%	56 16.6% B	39 10.7%	60 13.6%	35 13.5%	42 12.0%	35 15.6%	18 14.3%	62 14.0%	33 12.8%

Table 34
 VALUE OF INDUSTRY RESOURCES WHEN PURCHASING WOODWORKING EQUIPMENT: TOP 2 BOX SUMMARY

Q.13A: PLEASE RATE THE VALUE OF EACH OF THE FOLLOWING INDUSTRY RESOURCES FOR FINDING INFORMATION ABOUT MANUFACTURERS OF WOODWORKING EQUIPMENT DURING AN EQUIPMENT PURCHASE PROCESS. USE A 6-POINT SCALE WHERE 6 = EXTREMELY VALUABLE AND 1 = NOT AT ALL VALUABLE.

	TOTAL	NUMBER OF EMPLOYEES		BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
		1-19	20+	OPTIMISTIC	PESSIMISTIC	\$100,000 OR	MORE THAN	DON'T KNOW/	IMPORTANT	NOT
		(A)	(B)	(EXCELLENT/ GOOD) (C)	(FAIR/POOR/ TERRIBLE) (D)	LESS OR (E)	\$100,000 (F)	UNDECIDED (G)	(6-5-4) (H)	IMPORTANT (3-2-1) (I)
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
TRADESHOWS	530 75.6%	263 78.0%	267 73.4%	340 77.1%	190 73.1%	266 76.0%	169 75.1%	95 75.4%	353 79.5% I	177 68.9%
INTERNET	458 65.3%	233 69.1% B	225 61.8%	293 66.4%	165 63.5%	245 70.0% F	129 57.3%	84 66.7%	305 68.7% I	153 59.5%
LOCAL DISTRIBUTOR/SALES REP	371 52.9%	165 49.0%	206 56.6% A	228 51.7%	143 55.0%	173 49.4%	127 56.4%	71 56.3%	249 56.1% I	122 47.5%
COMPANY LITERATURE	326 46.5%	181 53.7% B	145 39.8%	208 47.2%	118 45.4%	170 48.6%	92 40.9%	64 50.8%	230 51.8% I	96 37.4%
TRADE PUBLICATION	324 46.2%	193 57.3% B	131 36.0%	219 49.7% D	105 40.4%	189 54.0% F	78 34.7%	57 45.2%	226 50.9% I	98 38.1%

Table 35
 VALUE OF INDUSTRY RESOURCES WHEN PURCHASING WOODWORKING EQUIPMENT: BOTTOM 2 BOX SUMMARY

Q.13A: PLEASE RATE THE VALUE OF EACH OF THE FOLLOWING INDUSTRY RESOURCES FOR FINDING INFORMATION ABOUT MANUFACTURERS OF WOODWORKING EQUIPMENT DURING AN EQUIPMENT PURCHASE PROCESS. USE A 6-POINT SCALE WHERE 6 = EXTREMELY VALUABLE AND 1 = NOT AT ALL VALUABLE.

	BUSINESS OUTLOOK CY 2008									
	TOTAL	NUMBER OF EMPLOYEES		OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
		1-19 (A)	20+ (B)			\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
LOCAL DISTRIBUTOR/SALES REP	77 11.0%	42 12.5%	35 9.6%	56 12.7% D	21 8.1%	48 13.7% G	21 9.3%	8 6.3%	45 10.1%	32 12.5%
TRADE PUBLICATION	60 8.6%	23 6.8%	37 10.2%	36 8.2%	24 9.2%	28 8.0%	23 10.2%	9 7.1%	36 8.1%	24 9.3%
COMPANY LITERATURE	53 7.6%	24 7.1%	29 8.0%	29 6.6%	24 9.2%	29 8.3%	19 8.4%	5 4.0%	38 8.6%	15 5.8%
INTERNET	43 6.1%	18 5.3%	25 6.9%	27 6.1%	16 6.2%	17 4.9%	20 8.9%	6 4.8%	22 5.0%	21 8.2%
TRADESHOWS	24 3.4%	10 3.0%	14 3.8%	12 2.7%	12 4.6%	10 2.9%	8 3.6%	6 4.8%	15 3.4%	9 3.5%

Table 36
 VALUE OF INDUSTRY RESOURCES WHEN PURCHASING WOODWORKING EQUIPMENT: BOTTOM BOX SUMMARY

Q.13A: PLEASE RATE THE VALUE OF EACH OF THE FOLLOWING INDUSTRY RESOURCES FOR FINDING INFORMATION ABOUT MANUFACTURERS OF WOODWORKING EQUIPMENT DURING AN EQUIPMENT PURCHASE PROCESS. USE A 6-POINT SCALE WHERE 6 = EXTREMELY VALUABLE AND 1 = NOT AT ALL VALUABLE.

	TOTAL	NUMBER OF EMPLOYEES		BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
		1-19	20+	OPTIMISTIC	PESSIMISTIC	\$100,000 OR	MORE THAN	DON'T KNOW/	IMPORTANT	NOT
		(A)	(B)	(EXCELLENT/ GOOD) (C)	(FAIR/POOR/ TERRIBLE) (D)	LESS (E)	\$100,000 (F)	UNDECIDED (G)	(6-5-4) (H)	IMPORTANT (3-2-1) (I)
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
LOCAL DISTRIBUTOR/SALES REP	31 4.4%	15 4.5%	16 4.4%	21 4.8%	10 3.8%	16 4.6%	10 4.4%	5 4.0%	17 3.8%	14 5.4%
COMPANY LITERATURE	20 2.9%	8 2.4%	12 3.3%	14 3.2%	6 2.3%	10 2.9%	7 3.1%	3 2.4%	11 2.5%	9 3.5%
INTERNET	15 2.1%	9 2.7%	6 1.6%	12 2.7%	3 1.2%	6 1.7%	6 2.7%	3 2.4%	6 1.4%	9 3.5%
TRADE PUBLICATION	15 2.1%	6 1.8%	9 2.5%	9 2.0%	6 2.3%	8 2.3%	4 1.8%	3 2.4%	8 1.8%	7 2.7%
TRADESHOWS	11 1.6%	5 1.5%	6 1.6%	7 1.6%	4 1.5%	6 1.7%	2 0.9%	3 2.4%	6 1.4%	5 1.9%

Table 37
 VALUE OF INDUSTRY RESOURCES WHEN PURCHASING WOODWORKING EQUIPMENT: MEAN SUMMARY

Q.13A: PLEASE RATE THE VALUE OF EACH OF THE FOLLOWING INDUSTRY RESOURCES FOR FINDING INFORMATION ABOUT MANUFACTURERS OF WOODWORKING EQUIPMENT DURING AN EQUIPMENT PURCHASE PROCESS. USE A 6-POINT SCALE WHERE 6 = EXTREMELY VALUABLE AND 1 = NOT AT ALL VALUABLE.

	OVERALL MEAN	NUMBER OF EMPLOYEES		BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
		1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
TRADESHOWS	5.0	5.1 B	4.9	5.0	4.9	5.0	5.0	4.9	5.1 I	4.8
INTERNET	4.8	4.8	4.7	4.8	4.7	4.8 F	4.6	4.9 F	4.8 I	4.6
LOCAL DISTRIBUTOR/SALES REP	4.3	4.3	4.4	4.3	4.5	4.2	4.4 E	4.6 E	4.4	4.3
COMPANY LITERATURE	4.3	4.4 B	4.2	4.3	4.2	4.3	4.2	4.4	4.3	4.2
TRADE PUBLICATION	4.3	4.5 B	4.0	4.3 D	4.1	4.4 F	4.1	4.2	4.4 I	4.1

Table 38
IMPORTANCE OF LOCAL DISTRIBUTOR FOR PURCHASES, BY TYPE OF PURCHASE (SUMMARY)

Q.13B: HOW IMPORTANT IS A LOCAL DISTRIBUTOR FOR EACH OF THE FOLLOWING PURCHASES? USE A 6-POINT SCALE WHERE 6 = EXTREMELY IMPORTANT AND 1 = NOT AT ALL IMPORTANT.

	TOTAL	TOP 2 BOX (NET)	6 (EXTREMELY IMPORTANT)	5	4	3	BOTTOM 2 BOX (NET)	2	1 (NOT AT ALL IMPORTANT)
SUPPLIES	701 100.0%	486 69.3%	273 38.9%	213 30.4%	119 17.0%	54 7.7%	42 6.0%	16 2.3%	26 3.7%
TOOLING	701 100.0%	438 62.5%	215 30.7%	223 31.8%	114 16.3%	74 10.6%	75 10.7%	40 5.7%	35 5.0%
SERVICE OF EQUIPMENT/ MACHINERY	701 100.0%	488 69.6%	292 41.7%	196 28.0%	108 15.4%	49 7.0%	56 8.0%	27 3.9%	29 4.1%
EQUIPMENT/MACHINERY UNDER \$10,000	701 100.0%	323 46.1%	136 19.4%	187 26.7%	187 26.7%	96 13.7%	95 13.6%	43 6.1%	52 7.4%
EQUIPMENT/MACHINERY \$10,000 OR MORE	701 100.0%	320 45.6%	158 22.5%	162 23.1%	154 22.0%	91 13.0%	136 19.4%	47 6.7%	89 12.7%

NOTE: SIGNIFICANCE TESTING NOT EMPLOYED DUE TO USE OF HORIZONTAL PERCENTAGES.

Table 39
 IMPORTANCE OF LOCAL DISTRIBUTOR FOR PURCHASES, BY TYPE OF PURCHASE: TOP BOX SUMMARY

Q.13B: HOW IMPORTANT IS A LOCAL DISTRIBUTOR FOR EACH OF THE FOLLOWING PURCHASES? USE A 6-POINT SCALE WHERE 6 = EXTREMELY IMPORTANT AND 1 = NOT AT ALL IMPORTANT.

	BUSINESS OUTLOOK CY 2008									
	NUMBER OF EMPLOYEES			EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN			
	TOTAL	1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
SERVICE OF EQUIPMENT/ MACHINERY	292 41.7%	131 38.9%	161 44.2%	176 39.9%	116 44.6%	132 37.7%	104 46.2%	56 44.4%	188 42.3%	104 40.5%
SUPPLIES	273 38.9%	137 40.7%	136 37.4%	171 38.8%	102 39.2%	129 36.9%	96 42.7%	48 38.1%	175 39.4%	98 38.1%
TOOLING	215 30.7%	96 28.5%	119 32.7%	132 29.9%	83 31.9%	94 26.9%	79 35.1%	42 33.3%	137 30.9%	78 30.4%
EQUIPMENT/MACHINERY \$10,000 OR MORE	158 22.5%	78 23.1%	80 22.0%	93 21.1%	65 25.0%	77 22.0%	47 20.9%	34 27.0%	108 24.3%	50 19.5%
EQUIPMENT/MACHINERY UNDER \$10,000	136 19.4%	81 24.0%	55 15.1%	90 20.4%	46 17.7%	67 19.1%	39 17.3%	30 23.8%	88 19.8%	48 18.7%

Table 40
IMPORTANCE OF LOCAL DISTRIBUTOR FOR PURCHASES, BY TYPE OF PURCHASE: TOP 2 BOX SUMMARY

Q.13B: HOW IMPORTANT IS A LOCAL DISTRIBUTOR FOR EACH OF THE FOLLOWING PURCHASES? USE A 6-POINT SCALE WHERE 6 = EXTREMELY IMPORTANT AND 1 = NOT AT ALL IMPORTANT.

	BUSINESS OUTLOOK CY 2008									
	TOTAL	NUMBER OF EMPLOYEES		OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
		1-19 (A)	20+ (B)			\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
SERVICE OF EQUIPMENT/ MACHINERY	488 69.6%	231 68.5%	257 70.6%	306 69.4%	182 70.0%	232 66.3%	164 72.9%	92 73.0%	325 73.2% I	163 63.4%
SUPPLIES	486 69.3%	234 69.4%	252 69.2%	309 70.1%	177 68.1%	238 68.0%	160 71.1%	88 69.8%	314 70.7%	172 66.9%
TOOLING	438 62.5%	203 60.2%	235 64.6%	270 61.2%	168 64.6%	206 58.9%	145 64.4%	87 69.0% E	291 65.5% I	147 57.2%
EQUIPMENT/MACHINERY UNDER \$10,000	323 46.1%	172 51.0% B	151 41.5%	210 47.6%	113 43.5%	166 47.4%	95 42.2%	62 49.2%	212 47.7%	111 43.2%
EQUIPMENT/MACHINERY \$10,000 OR MORE	320 45.6%	150 44.5%	170 46.7%	191 43.3%	129 49.6%	148 42.3%	108 48.0%	64 50.8%	219 49.3% I	101 39.3%

Table 41
IMPORTANCE OF LOCAL DISTRIBUTOR FOR PURCHASES, BY TYPE OF PURCHASE: BOTTOM 2 BOX SUMMARY

Q.13B: HOW IMPORTANT IS A LOCAL DISTRIBUTOR FOR EACH OF THE FOLLOWING PURCHASES? USE A 6-POINT SCALE WHERE 6 = EXTREMELY IMPORTANT AND 1 = NOT AT ALL IMPORTANT.

	BUSINESS OUTLOOK CY 2008									COUNTRY-OF-ORIGIN	
	TOTAL	NUMBER OF EMPLOYEES		OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	EXPECTED CAP IMPR 2008			IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)	
		1-19 (A)	20+ (B)			\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)			
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%	
EQUIPMENT/MACHINERY \$10,000 OR MORE	136 19.4%	82 24.3% B	54 14.8%	90 20.4%	46 17.7%	83 23.7% FG	33 14.7%	20 15.9%	82 18.5%	54 21.0%	
EQUIPMENT/MACHINERY UNDER \$10,000	95 13.6%	47 13.9%	48 13.2%	65 14.7%	30 11.5%	47 13.4%	34 15.1%	14 11.1%	62 14.0%	33 12.8%	
TOOLING	75 10.7%	48 14.2% B	27 7.4%	51 11.6%	24 9.2%	47 13.4% F	17 7.6%	11 8.7%	47 10.6%	28 10.9%	
SERVICE OF EQUIPMENT/ MACHINERY	56 8.0%	35 10.4% B	21 5.8%	39 8.8%	17 6.5%	34 9.7%	15 6.7%	7 5.6%	33 7.4%	23 8.9%	
SUPPLIES	42 6.0%	26 7.7%	16 4.4%	25 5.7%	17 6.5%	21 6.0%	12 5.3%	9 7.1%	23 5.2%	19 7.4%	

Table 42
 IMPORTANCE OF LOCAL DISTRIBUTOR FOR PURCHASES, BY TYPE OF PURCHASE: BOTTOM BOX SUMMARY

Q.13B: HOW IMPORTANT IS A LOCAL DISTRIBUTOR FOR EACH OF THE FOLLOWING PURCHASES? USE A 6-POINT SCALE WHERE 6 = EXTREMELY IMPORTANT AND 1 = NOT AT ALL IMPORTANT.

	BUSINESS OUTLOOK CY 2008									COUNTRY-OF-ORIGIN	
	TOTAL	NUMBER OF EMPLOYEES		OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	EXPECTED CAP IMPR 2008			IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)	
		1-19 (A)	20+ (B)			\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)			
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%	
EQUIPMENT/MACHINERY \$10,000 OR MORE	89 12.7%	53 15.7%	36 9.9%	57 12.9%	32 12.3%	51 14.6%	21 9.3%	17 13.5%	54 12.2%	35 13.6%	
EQUIPMENT/MACHINERY UNDER \$10,000	52 7.4%	24 7.1%	28 7.7%	36 8.2%	16 6.2%	19 5.4%	20 8.9%	13 10.3%	33 7.4%	19 7.4%	
TOOLING	35 5.0%	21 6.2%	14 3.8%	23 5.2%	12 4.6%	20 5.7%	8 3.6%	7 5.6%	18 4.1%	17 6.6%	
SERVICE OF EQUIPMENT/ MACHINERY	29 4.1%	18 5.3%	11 3.0%	19 4.3%	10 3.8%	18 5.1%	6 2.7%	5 4.0%	16 3.6%	13 5.1%	
SUPPLIES	26 3.7%	15 4.5%	11 3.0%	17 3.9%	9 3.5%	13 3.7%	6 2.7%	7 5.6%	12 2.7%	14 5.4%	

Table 43
IMPORTANCE OF LOCAL DISTRIBUTOR FOR PURCHASES, BY TYPE OF PURCHASE: MEAN SUMMARY

Q.13B: HOW IMPORTANT IS A LOCAL DISTRIBUTOR FOR EACH OF THE FOLLOWING PURCHASES? USE A 6-POINT SCALE WHERE 6 EXTREMELY IMPORTANT AND 1 NOT AT ALL IMPORTANT.

	OVERALL MEAN	NUMBER OF EMPLOYEES		BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
		1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
		-----	-----	-----	-----	-----	-----	-----	-----	-----
SUPPLIES	4.8	4.8	4.9	4.9	4.8	4.8	4.9	4.8	4.9	4.8
SERVICE OF EQUIPMENT/ MACHINERY	4.8	4.8	4.9	4.8	4.9	4.7	5.0 E	5.0	4.9	4.7
TOOLING	4.6	4.4	4.7 A	4.5	4.6	4.4	4.7 E	4.7 E	4.6	4.5
EQUIPMENT/MACHINERY UNDER \$10,000	4.2	4.3	4.1	4.2	4.2	4.2	4.1	4.3	4.2	4.1
EQUIPMENT/MACHINERY \$10,000 OR MORE	4.0	3.9	4.2	4.0	4.1	3.9	4.2 E	4.2	4.1 I	3.9

Table 44
RESPONSE TO "GREEN" PRODUCTS MOVEMENT

Q.14: HOW, IF AT ALL, IS YOUR COMPANY RESPONDING TO THE "GREEN" PRODUCTS MOVEMENT?

	BUSINESS OUTLOOK CY 2008									COUNTRY-OF-ORIGIN	
	TOTAL	NUMBER OF EMPLOYEES		OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	EXPECTED CAP IMPR 2008			IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)	
		1-19 (A)	20+ (B)			\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)			
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%	
USE "GREEN" PRODUCTS (NET) -----	317 45.2%	105 31.2%	212 58.2% A	195 44.2%	122 46.9%	139 39.7%	126 56.0% EG	52 41.3%	208 46.8%	109 42.4%	
USE COMPOSITE WOOD PANELS WITH NO ADDED FORMALDEHYDE	160 22.8%	45 13.4%	115 31.6% A	103 23.4%	57 21.9%	66 18.9%	68 30.2% EG	26 20.6%	110 24.8%	50 19.5%	
USE FSC CERTIFIED WOODS	156 22.3%	47 13.9%	109 29.9% A	93 21.1%	63 24.2%	63 18.0%	71 31.6% EG	22 17.5%	99 22.3%	57 22.2%	
USE SFI CERTIFIED WOODS	77 11.0%	24 7.1%	53 14.6% A	44 10.0%	33 12.7%	30 8.6%	37 16.4% EG	10 7.9%	52 11.7%	25 9.7%	
OTHER	72 10.3%	27 8.0%	45 12.4%	42 9.5%	30 11.5%	33 9.4%	24 10.7%	15 11.9%	49 11.0%	23 8.9%	
NOT USING ANY "GREEN" PRODUCTS	365 52.1%	225 66.8% B	140 38.5%	239 54.2%	126 48.5%	205 58.6% F	94 41.8%	66 52.4%	224 50.5%	141 54.9%	
NO RESPONSE	19 2.7%	7 2.1%	12 3.3%	7 1.6%	12 4.6% C	6 1.7%	5 2.2%	8 6.3% E	12 2.7%	7 2.7%	
SIGMA	121.1%	111.3%	130.2%	119.7%	123.5%	115.1%	132.9%	116.7%	123.0%	117.9%	

NOTE: THIS WAS A REQUIRED QUESTION, HOWEVER SOME WRITE-INS FOR "OTHER" WERE DETERMINED TO BE OUTSIDE THE RANGE OF RELEVANT RESPONSES AND WERE REMOVED, AND THUS BECAME "NO RESPONSE" TO THE QUESTION.

Table 45
WHETHER IMPLEMENT LEAN MANUFACTURING

Q.15: HAS YOUR OPERATION IMPLEMENTED LEAN MANUFACTURING CONCEPTS?

	BUSINESS OUTLOOK CY 2008									COUNTRY-OF-ORIGIN	
	TOTAL	NUMBER OF EMPLOYEES		OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	EXPECTED CAP IMPR 2008			IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)	
		1-19 (A)	20+ (B)			\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)			
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%	
YES	297 42.4%	81 24.0%	216 59.3% A	180 40.8%	117 45.0%	95 27.1%	136 60.4% E	66 52.4% E	182 41.0%	115 44.7%	
NO	246 35.1%	163 48.4% B	83 22.8%	149 33.8%	97 37.3%	159 45.4% FG	48 21.3%	39 31.0%	154 34.7%	92 35.8%	
NOT YET, BUT CONTEMPLATING DOING SO	158 22.5%	93 27.6% B	65 17.9%	112 25.4% D	46 17.7%	96 27.4% FG	41 18.2%	21 16.7%	108 24.3%	50 19.5%	
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Table 46
 LIKELIHOOD OF VISITING WMMA BOOTH AT IWF 2008 TO SEE TECHNOLOGY DEMONSTRATION

Q.16: THE WOOD MACHINERY MANUFACTURERS OF AMERICA (WMMA) IS PLANNING TO SHOWCASE TECHNOLOGY IN A DEMONSTRATION CENTER AT IWF 2008. USING A 6-POINT SCALE WHERE 6 = EXTREMELY LIKELY AND 1 = NOT AT ALL LIKELY, PLEASE INDICATE THE LIKELIHOOD YOU WILL VISIT THE BOOTH TO SEE THE TECHNOLOGY DEMONSTRATION.

	BUSINESS OUTLOOK CY 2008									
	NUMBER OF EMPLOYEES			BUSINESS OUTLOOK CY 2008		EXPECTED CAP IMPR 2008			COUNTRY-OF-ORIGIN	
	TOTAL	1-19 (A)	20+ (B)	OPTIMISTIC (EXCELLENT/ GOOD) (C)	PESSIMISTIC (FAIR/POOR/ TERRIBLE) (D)	\$100,000 OR LESS (E)	MORE THAN \$100,000 (F)	DON'T KNOW/ UNDECIDED (G)	IMPORTANT (6-5-4) (H)	NOT IMPORTANT (3-2-1) (I)
BASE	701 100.0%	337 100.0%	364 100.0%	441 100.0%	260 100.0%	350 100.0%	225 100.0%	126 100.0%	444 100.0%	257 100.0%
TOP 2 BOX (NET)	418 59.6%	195 57.9%	223 61.3%	272 61.7%	146 56.2%	197 56.3%	155 68.9% EG	66 52.4%	272 61.3%	146 56.8%
6 (EXTREMELY LIKELY)	218 31.1%	105 31.2%	113 31.0%	145 32.9%	73 28.1%	98 28.0%	82 36.4% E	38 30.2%	148 33.3%	70 27.2%
5	200 28.5%	90 26.7%	110 30.2%	127 28.8%	73 28.1%	99 28.3%	73 32.4% G	28 22.2%	124 27.9%	76 29.6%
4	173 24.7%	86 25.5%	87 23.9%	107 24.3%	66 25.4%	91 26.0% F	39 17.3%	43 34.1% F	111 25.0%	62 24.1%
3	42 6.0%	22 6.5%	20 5.5%	22 5.0%	20 7.7%	25 7.1%	10 4.4%	7 5.6%	25 5.6%	17 6.6%
BOTTOM 2 BOX (NET)	68 9.7%	34 10.1%	34 9.3%	40 9.1%	28 10.8%	37 10.6%	21 9.3%	10 7.9%	36 8.1%	32 12.5%
2	29 4.1%	15 4.5%	14 3.8%	17 3.9%	12 4.6%	18 5.1%	6 2.7%	5 4.0%	15 3.4%	14 5.4%
1 (NOT AT ALL LIKELY)	39 5.6%	19 5.6%	20 5.5%	23 5.2%	16 6.2%	19 5.4%	15 6.7%	5 4.0%	21 4.7%	18 7.0%
MEAN	4.6	4.6	4.6	4.7	4.5	4.5	4.8 E	4.6	4.7 I	4.5
MEDIAN	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0
MODE	6	6	6	6	-	5	6	4	6	5
SIGMA	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



Appendix C: QUESTIONNAIRE





Welcome to our survey! In a partnership with **IWF**, **WMMA** would like to better understand the needs of woodworking professionals as we approach the 2008 IWF. This information will help members of the WMMA provide a more **beneficial experience** at this important industry event. We hope you will take a few minutes to complete our survey. As a token of our appreciation, those who complete the survey and provide their e-mail address will be entered into a sweepstakes to award five **\$100 Visa gift cards**. Thank you in advance for your participation!

Q.1: What is the primary product your company manufactures? (Please check only one.)

- Architectural woodwork/mouldings
- Closet/garage organization systems
- Kitchen cabinets/bathroom vanities
- Millwork (mouldings, stairs, doors, windows)
- Office furniture
- Store fixtures/displays
- Wood components
- Wood household furniture
- Other (please specify) →

Q.2: Please indicate the main geographic location of the office/plant where you work.

- United States
- Canada
- Other (please specify) →

[If U.S.] Q.2b: In which specific state is your personal place of business located? (Please select from the drop-down list.)

[If Canada] Q2c: In which Canadian province is your personal place of business located? (Please select from the drop-down list.)

Q.3: How many, including you, are currently employed at your operation? If your company has multiple locations, please select the number of employees at all locations combined.

- 1-4
- 5-19
- 20-49
- 50-99
- 100 or more

Q.3a: How many operating locations does your company have currently?

- 1
- 2
- 3-5
- 6-9
- 10-19
- 20 or more

Q.4a: Do you personally plan to attend IWF 2008, August 20-23, in Atlanta?

- Yes
- No
- Not sure

Q.4b: How many people from your company do you expect will attend IWF 2008?

will attend IWF 2008

Q.4c: How does this compare to your company's attendance at IWF 2006? (Please select only one.)

- More people attending in 2008 than 2006
- Fewer people attending in 2008 than 2006
- About the same number of people attending in 2008 as 2006
- Company personnel did not attend in 2006
- Don't know

Q.5: In comparison to the last 3 years, how would you rate your company's business for Calendar Year 2007, the year just ended?

	Excellent	Good	Fair	Poor	Terrible
Company's business for 2007	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q.6a: How well do you expect your company to perform in Calendar Year 2008?

	Excellent	Good	Fair	Poor	Terrible
Expect company to perform in 2008	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q.6b: Can you elaborate on your expectation for your company's performance in Calendar 2008? Please be as specific as possible.

Q.7: Which one of the following issues poses the single biggest obstacle to your company's success over the next 3 years? (Please select only one.)

- Government regulations
- Imported wood products
- Recruiting/retaining skilled woodworkers
- The U.S. economy
- The weak housing market
- Other (please specify) →

Q.7b: Why do you feel [response to Q7] is the single biggest obstacle to your company's success over the next 3 years? Please be as specific as possible.

Q.8: Approximately how much will your company invest in capital improvements in 2008?

- \$10,000 or less
- \$10,001 - \$50,000
- \$50,001 - \$100,000
- \$100,001 - \$250,000
- \$250,001 - \$500,000
- \$500,001 - \$1 million
- More than \$1 million
- Don't know / undecided

Q.9: Which of the following areas will your company's 2008 capital expenditure programs target? For each category (row), please indicate how much, if anything, your company will spend. (Check one across for each area.)

	\$0	\$1 - \$10,000	\$10,001 - \$50,000	\$50,001 - \$100,000	More than \$100,000	Don't know / undecided
Assembly	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Dust control	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Finishing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Laminating	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Panel processing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Software	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Solid wood machining	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Veneering	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wood waste management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q.10: How important is the country-of-origin (where a piece of equipment was manufactured) to your ultimate equipment purchasing decision? Use a 6-point scale where 6=Extremely Important and 1=Not At All Important.

	6 = Extremely Important	5	4	3	2	1 = Not At All Important
Importance of machinery/equipment country-of-origin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q.11: What types of machinery/equipment, if any, have you already bought in 2008 or are you planning to buy in 2008? (Please check all that apply.)

- Assembly machine/system
- Bandsaw
- Boring machine
- CNC machining center
- CNC router
- Case clamp
- Clamp carrier
- Computer software
- Cut-off saw
- Door manufacturing equipment
- Dovetail machine
- Dry kiln
- Dust collection equipment
- Edgebander
- Fingerjoint machine
- Flat line finishing equipment
- Glue spreader
- Laminating equipment
- Material handling
- Moulder
- Packaging equipment
- Panel saw
- Planer
- Pocket hole machinery
- Profiling machine
- Ripsaw
- Sanding equipment
- Shaper
- Spray booth
- Spray equipment
- Veneering equipment
- Wood scrap grinder
- Other (please specify) →
- Do not intend to buy machinery/equipment in 2008

Q.12: Which of the following did you use to pay for major woodworking equipment purchases of \$10,000 or more during the past 3 years? (Check all that apply.)

- Bank loan
- Cash
- Lease/purchase
- Did not purchase equipment for \$10,000 or more in past 3 years

Q.12a: Has your company ever taken advantage of the following U.S. federal tax incentives to purchase equipment? (Please check one across in each row.)

	Yes	No	Not Sure	Not Familiar
<i>Direct expensing</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Depreciation bonus</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q.12b: Will your company take advantage of either of these incentives (direct expensing/depreciation bonus) offered in the 2008 U.S. Federal Stimulus Package to purchase equipment this year?

	Yes	No	Not Sure	Not Familiar
<i>Will use U.S. Federal Stimulus Package incentives to purchase in 2008</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q.13a: Please rate the value of each of the following industry resources for finding information about manufacturers of woodworking equipment during an equipment purchase process. Use a 6-point scale where 6 = Extremely Valuable and 1 = Not At All Valuable.

	6 = Extremely Valuable	5	4	3	2	1 = Not At All Valuable
<i>Company literature</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Internet</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Local distributor/sales rep</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Trade publication</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Tradeshows</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Other (please specify below) ↓</i> <input style="width: 100px; height: 15px;" type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q.13b: How important is a local distributor for each of the following purchases? Use a 6-point scale where 6 = Extremely Important and 1 = Not At All Important.

	6 = Extremely Important	5	4	3	2	1 = Not At All Important
Supplies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tooling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Service of equipment/machinery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Equipment/machinery under \$10,000	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Equipment/machinery \$10,000 or more	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q.14: How, if at all, is your company responding to the "green" products movement? (Check all that apply.)

- Use FSC certified woods
- Use SFI certified woods
- Use composite wood panels with no added formaldehyde
- Other (please specify) →
- Not using any "green" products

Q.15: Has your operation implemented Lean Manufacturing concepts?

- Yes
- No
- Not yet, but contemplating doing so

Q.16: The Wood Machinery Manufacturers of America (WMMA) is planning to showcase technology in a demonstration center at IWF 2008. Using a 6-point scale where 6 = Extremely Likely and 1 = Not At All Likely, please indicate the likelihood you will visit the booth to see the technology demonstration.

	6 = Extremely Likely	5	4	3	2	1 = Not At All Likely
Likelihood of visiting the WMMA booth's demonstration center.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q.17: What new sales or production strategies, if any, has your company initiated to remain successful? Please be as specific as possible.

Thank you for participating in this WMMA research study! We greatly appreciate the time you devoted to this endeavor. If you would like to enter the drawing to win one of five \$100 Visa gift cards, please enter your e-mail address below, so we may notify you if you are a winner. Your e-mail address will not in any way be associated with your survey responses; it will only be used to notify you if you are a winner.

Enter E-Mail Address Here	<input type="text"/>
Confirm E-Mail Address Here	<input type="text"/>
I prefer not to be entered in the drawing	<input type="checkbox"/>

Thank you for your participation!