

Executive Summary

Chart Five : Within Five Years<sup>10</sup> - Will You Grow, Reduce or 'No Change' of Production Workforce by Job Category [134 Survey Responses per Category, Cumulative Percent of Responses]

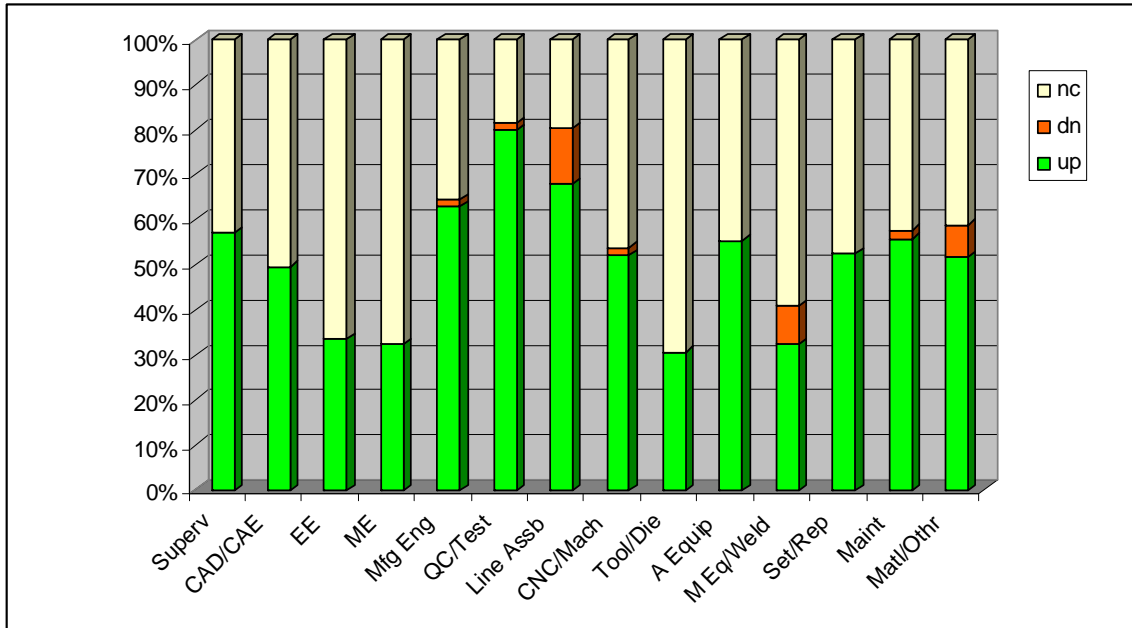
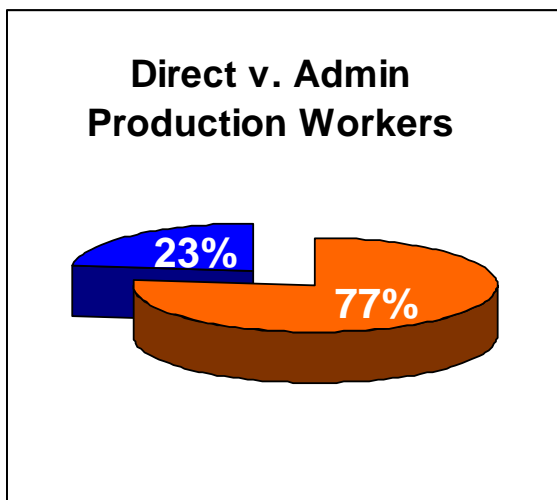


Chart Six: Manufacturer Responses: No. of Direct Production Workers vs. "Indirect" --Administrative Workers [6,081 Workers Total]



Blue: Administrative Workers  
 Orange: Direct Production Workers

<sup>10</sup> Manufacturers were asked to project total headcount, "up," "down" or "no change" from 2nd Q, 2011.

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Chart Seven: Profile of the Survey Responses -- 2,840 Companies

Blue: Number of Companies Responding to Survey

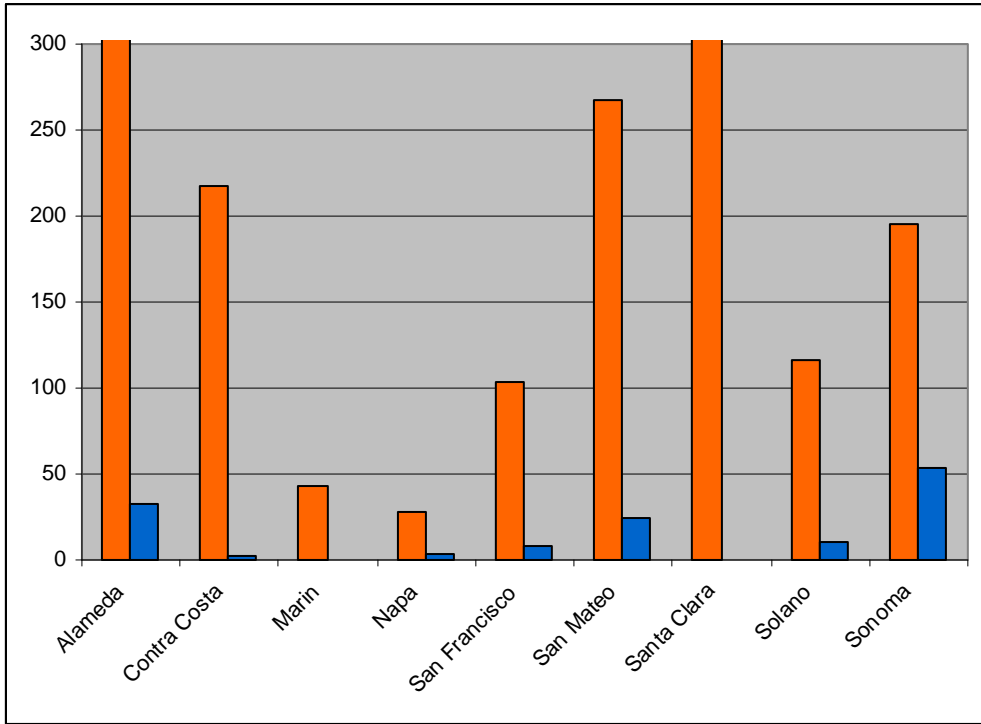
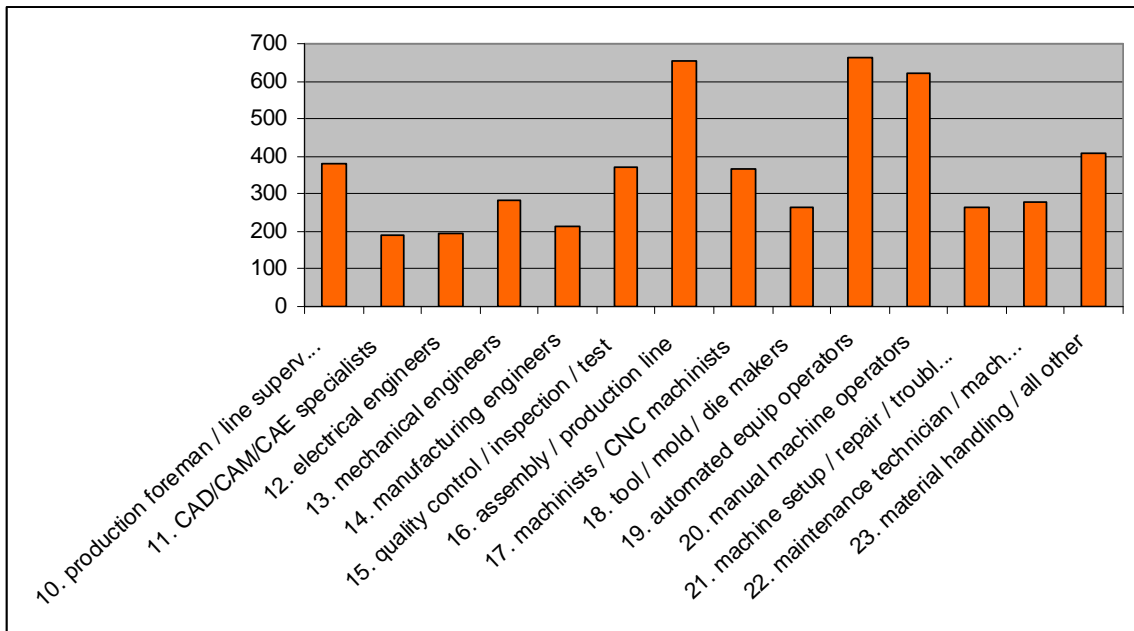


Chart Eight: Breakdown of Job Classifications - 5,224 Production [Direct] Employees



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**Chart Nine: Industries Surveyed - No. of Responses by Industry**

Industry	N	134	68 industries	Industry	Industry	Industry
2673	1		3541	1	3679	4 Electronic components
2819	1		3543	4 Patterns_industrial	3695	2
2834	2		3545	1	3731	3
2835	2		3553	1	3732	1
2836	2		3555	1	3751	1
2911	1		3559	6 Machinery_special industry	3761	1
3061	1		3569	1	3812	1
3084	1		3571	3	3821	1
3089	8 Plastic products		3572	1	3822	1
3220	1		3575	1	3825	1
3231	1		3576	3	3827	1
3259	1		3577	2	3829	3
3269	1		3599	7 Industrial machinery	3841	5 Surgical and medical instruments
3316	1		3612	1	3843	1
3363	1		3621	1	3845	6 Electromedical equipment
3423	2		3625	1	3851	2
3429	1		3651	1	3861	1
3433	1		3663	2	3993	1
3442	1		3669	7 Communications equipment	3999	2
3444	2		3671	1	4931	1
3446	1		3672	3		
3469	1		3674	6 Semiconductors and related devices		
3492	1		3677	1		
3499	3		3678	1		

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TABLE 1: Survey Projection: Hires, Retirement, Net New Training Requirements

	Superv	CAD/CAE	EE	ME	Mfg Eng	QC/Test	Line Assb	CNC/Mach	Tool/Die	A Equip	M Eq/Weld	Set/Rep	Maint	Matl/Othr	TOTALS
<b>EXISTING (Survey Count)</b>	382	189	193	285	215	372	652	364	266	663	622	266	279	408	5156
<b>Gross: Proj Growth*</b>	209	110	110	159	119	174	344	206	127	339	310	160	150	223	2740
<b>Retirement: (3% p Yr)</b>	(57)	(28)	(29)	(43)	(32)	(56)	(98)	(55)	(40)	(99)	(93)	(40)	(42)	(61)	(773)
<b>Closures: (Lowest 10%)</b>	(121)	(54)	(22)	(22)	(30)	(17)	(39)	(45)	(43)	(43)	(81)	(72)	(23)	(40)	(651)
<b>Existing Employees: 5 Yrs</b>	413	217	252	379	272	473	859	471	311	860	758	314	364	530	6472
<b>Replace: 30% of Retirees</b>	17	9	9	13	10	17	29	16	12	30	28	12	13	18	232
<b>Total Employees: 5 Yrs</b>	430	225	261	392	282	490	888	487	323	890	786	326	377	548	6704
<b>Net Growth Empl Level</b>	48	36	68	107	67	118	236	123	57	227	164	60	98	140	1548
Percent Growth	13%	19%	35%	38%	31%	32%	36%	34%	21%	34%	26%	22%	35%	34%	30%
<b>NET NEW WORKER TRAIN</b>	226	119	119	172	129	191	373	222	139	369	338	172	163	241	2972
Percent of Workforce	53%	53%	45%	44%	46%	39%	42%	46%	43%	41%	43%	53%	43%	44%	44%

<u>Extrapolation Statewide</u>	Superv	CAD/CAE	EE	ME	Mfg Eng	QC/Test	Line Assb	CNC/Mach	Tool/Die	A Equip	M Eq/Wel	Set/Rep	Maint	Matl/Othr
Hiring Ratio	7%	4%	4%	6%	4%	7%	13%	7%	5%	13%	12%	5%	5%	8%
<b>Net New Hires</b>	<b>4,277</b>	<b>2,116</b>	<b>2,161</b>	<b>3,191</b>	<b>2,407</b>	<b>4,165</b>	<b>7,299</b>	<b>4,075</b>	<b>2,978</b>	<b>7,422</b>	<b>6,963</b>	<b>2,978</b>	<b>3,123</b>	<b>4,568</b>