

Automation Study

Fall 2012



TABLE OF CONTENTS

Methodology	3
Job title and number of employees	6
Incidence of subsidiaries and impact on automation decisions	7
Current products	8
Business improvement	9
Global market competition	10
Use of robotics and automation	11
Impact of using robotics and automation	12
Increase in North American production	14
Decision makers and influencers	15
Respondent role in decisions	17
Important attributes when purchasing equipment	18
Important strategic targets	20
Typical purchase process	21
New equipment purchases	24
Country of equipment origin	25
Benefits of new equipment	26
Perception of Italian manufacturers	27
Use of Italian machines	28
Benefits of Italian machines	30
Strengths of Italian machines	31
Willingness to meet with Italian manufacturers	32
Awareness of Machines Italia campaign	33

METHODOLOGY

- Investigation conducted exclusively for the Italian Trade Commission.
- Methodology, data collection and analysis by Penton Research.
- Data collected October 31, 2012 through November 19, 2012.
- Methodology conforms to accepted marketing research methods, practices and procedures.

METHODOLOGY

OBJECTIVES

- Examine the use of automation and robotics among manufacturers.
- Investigate the use of and perception of Italian machines.
- Determine future purchasing plans and the important factors and players in the decision-making process.

METHODOLOGY

- On October 31, 2012, Penton Research emailed invitations to participate in an online survey to print subscribers of *IndustryWeek* magazine.
- By November 19, 2012, Penton Research received 342 completed surveys.

RESPONSE MOTIVATION

- To encourage prompt response and increase the response rate overall, the following marketing research techniques were used:
 - A drawing was held for a \$100 Visa gift card.
 - Live links were included on the e-mail invitations to route respondents directly to the online surveys.
 - The invitations and survey were branded with the property name and logo, in an effort to capitalize on subscriber affinity for the brand.
 - A follow-up was sent to non-respondents on November 12, 2012.

Research Findings



RESEARCH FINDINGS

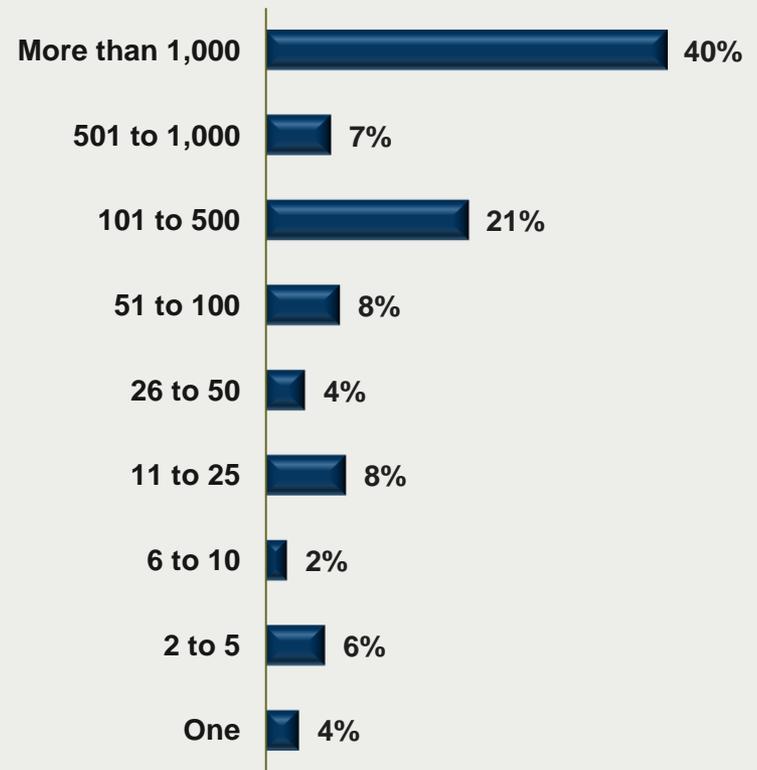
Respondents are primarily managers or executives for large companies.

While 46% of respondents indicated that their job function did not fit into one of the listed categories, most indicated they are at a manager-level position.

Which of the following best describes your job title or function?



How many people are employed by your company at all locations?

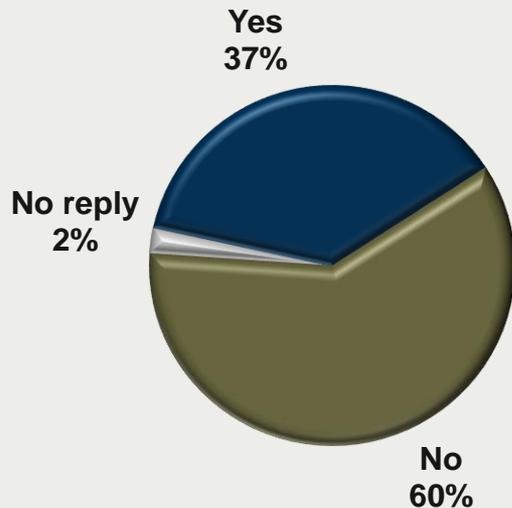


Base for both charts: all respondents (n=342).

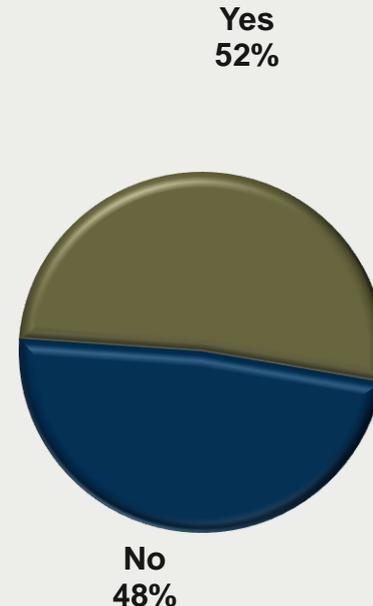
RESEARCH FINDINGS

The majority of respondents are not part of a larger organization or corporation. Those who are indicate this arrangement affects purchase decisions for automation and robotics.

Is your company a subsidiary of a larger organization/corporation?



If yes, does this corporate arrangement affect your purchase decisions regarding automation and robotics?



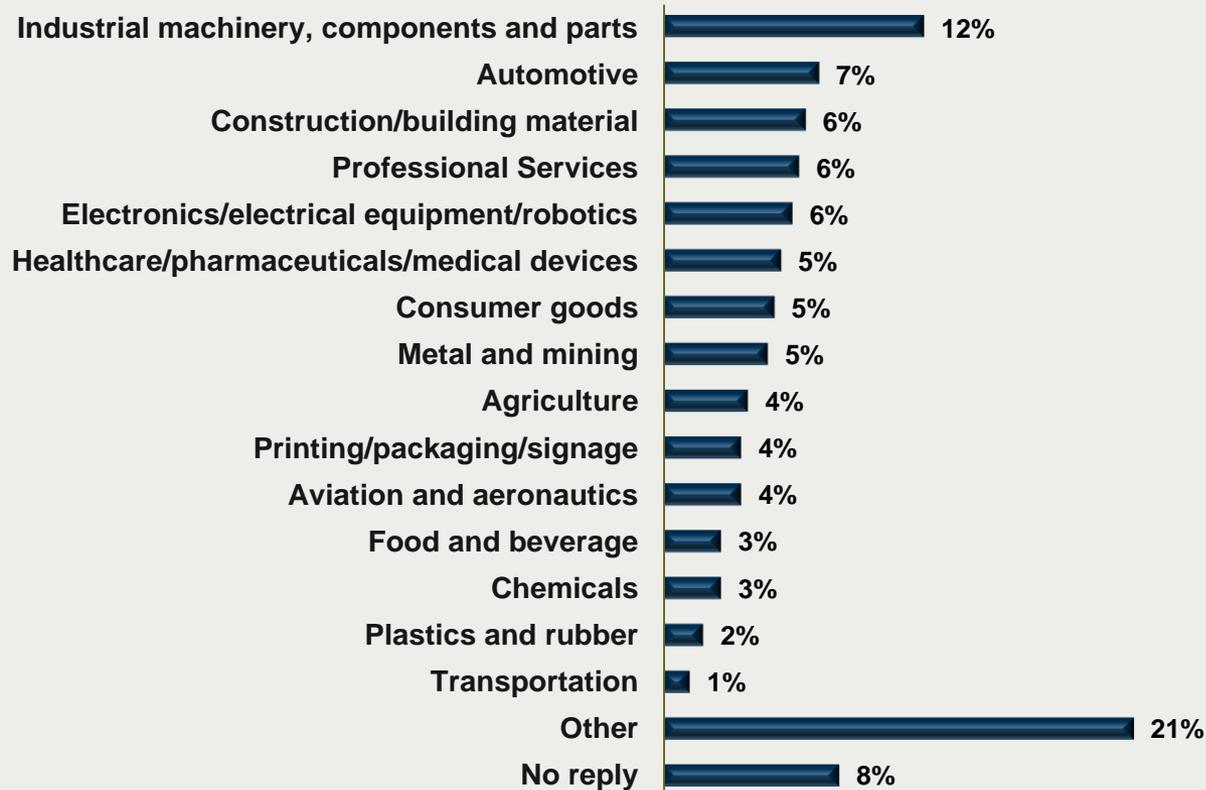
Base for chart on left: all respondents (342)

Base for chart on right: Respondents who are part of a larger organization (128).

RESEARCH FINDINGS

Respondents are involved in various industries, with the largest percentage involved in industrial machinery.

Please provide a brief summary of your current products.

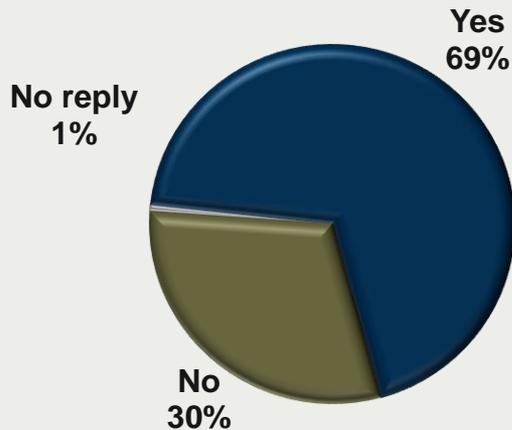


Base for both charts: all respondents (n=342).

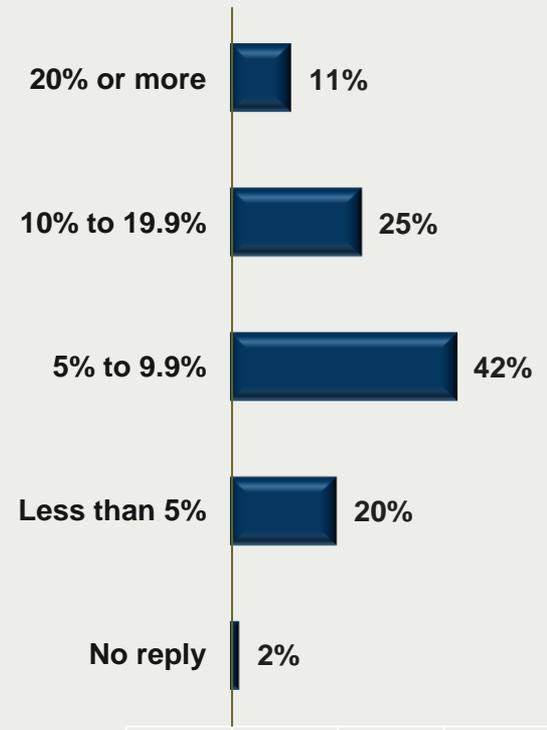
RESEARCH FINDINGS

More than two-thirds of respondents have seen an improvement in business over the past 24 months. The largest percentage of respondents indicate business has improved 5% to 9.9%.

Has your business improved over the past 24 months?



If yes, by how much?

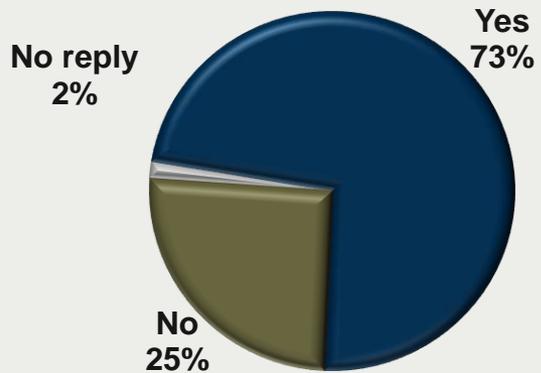


*Base for chart on left: all respondents (342)
Base for chart on right: Respondents whose business increased (236).*

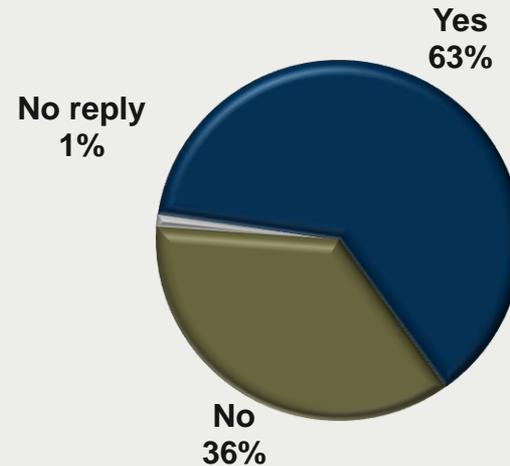
RESEARCH FINDINGS

Nearly three in four respondents compete in global markets. Those who do indicate that automated equipment or robotics has helped their firm compete.

Does your company compete in global markets?



Has automated equipment or robotics helped your firm compete in global markets?



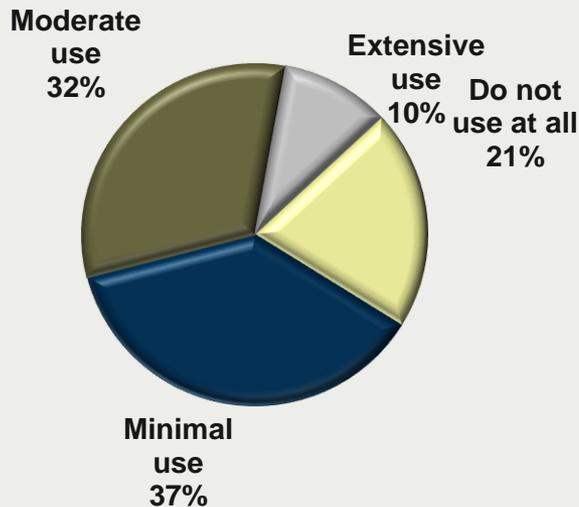
Base for chart on left: all respondents (342)

Base for chart on right: Respondents who compete in global markets (250).

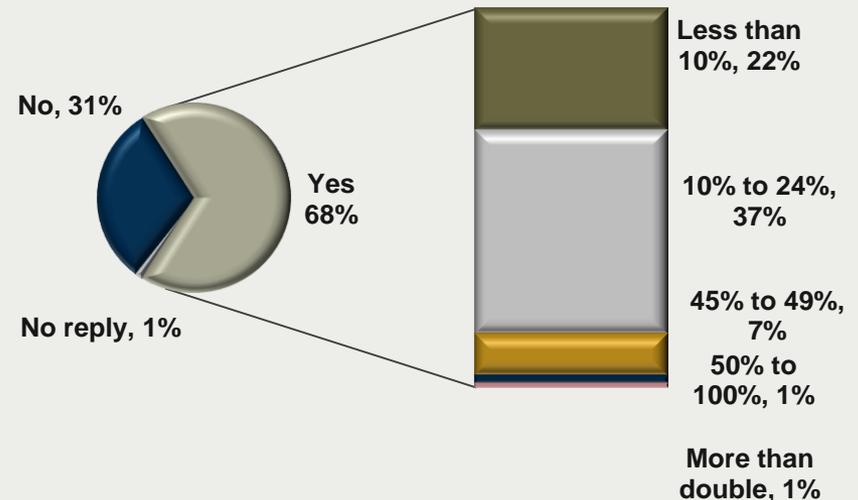
RESEARCH FINDINGS

About two-thirds of respondents indicate their company uses robotics and automation on a minimal to moderate level. The majority of respondents currently using automation and robotics plan to expand their current use by less than 25%.

How would you characterize the extent of your company's use of robotics and automation?



Do you plan to expand the use of automation beyond the current level?



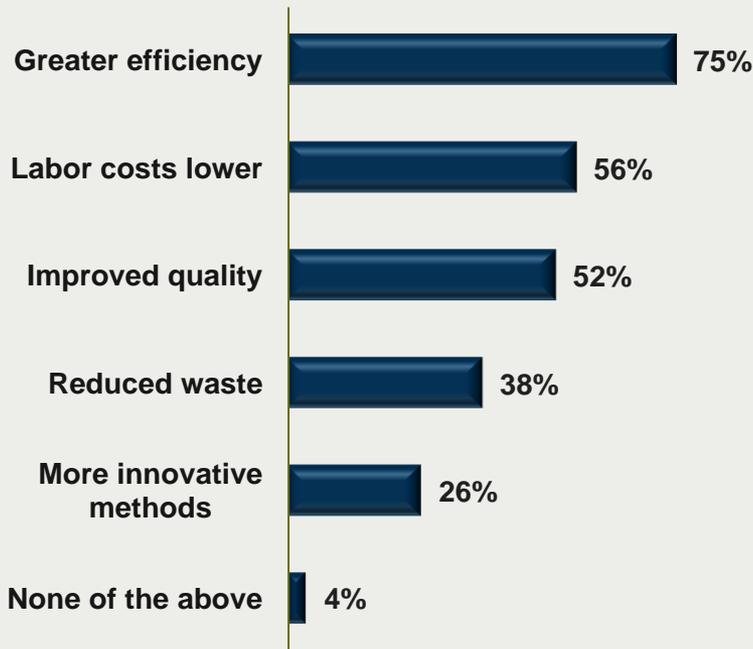
Base for chart on left: all respondents (342)

Base for chart on right: Respondents who currently use robotics or automation (271).

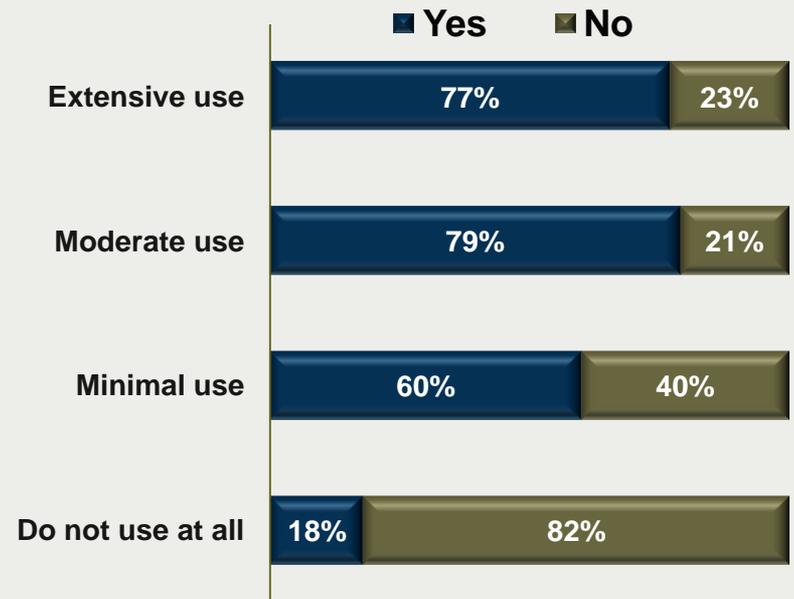
RESEARCH FINDINGS

Efficiency, lower costs and improved quality are the biggest benefits to using automation and robotics. The use of automation and robotics are likely to force an expansion of the skill level of a company's workforce, particularly among those companies with an extensive or moderate use.

What are the benefits of automation and robotics in terms of helping your firm become more competitive?



In order to accommodate greater use of automation and robotics, have you had to expand the skill level of your workforce?



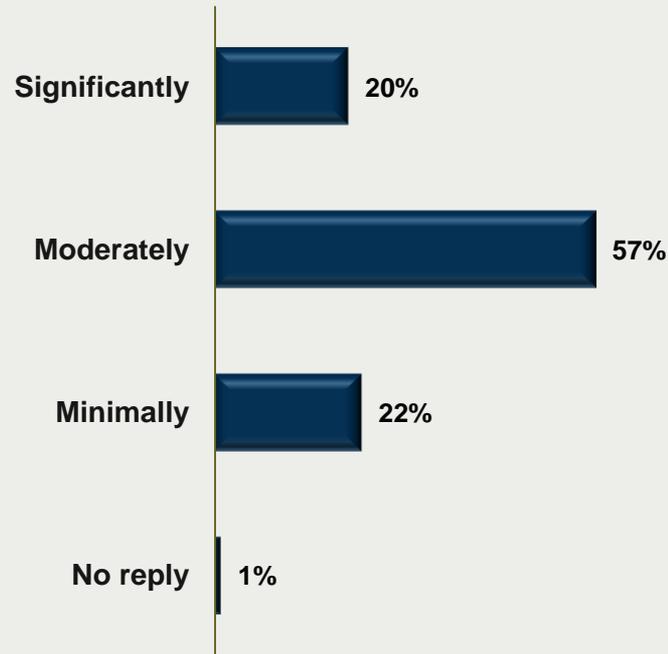
Base for chart on left: Respondents who currently use robotics or automation (271).

Base for chart on right: all respondents (342)

RESEARCH FINDINGS

In order to accommodate the greater use of robotics and automation, 59% of respondents have expanded the skill level of their workforce. Among those, three in four have expanded the skill level moderately or significantly.

If you have had to expand the skill level of your workforce, by how much?

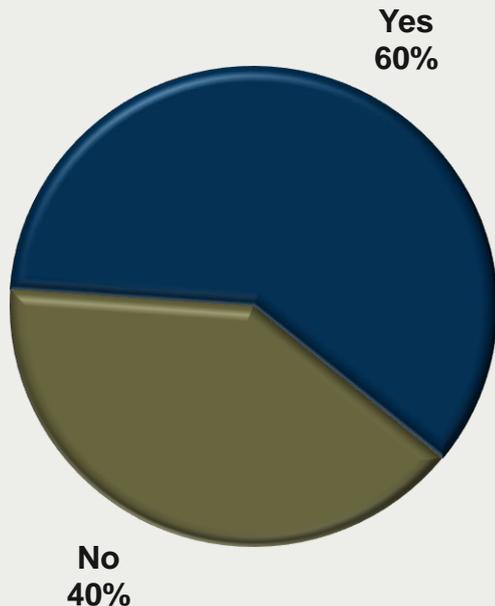


Base : respondents who have expanded skill level of workforce. (n=202).

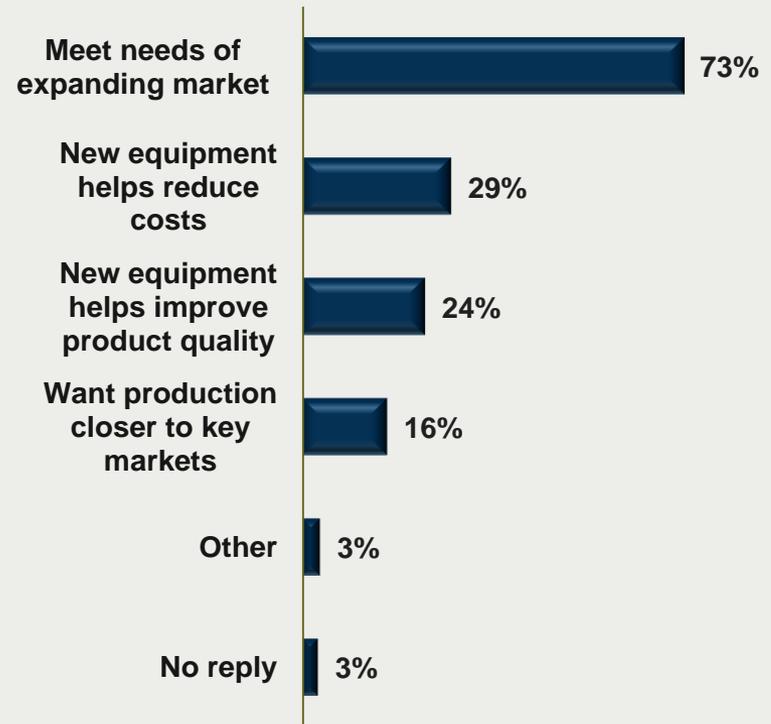
RESEARCH FINDINGS

The majority of respondents plan to increase North American production in an effort to meet the needs of an expanding market. 39% of respondents planning an increase in production expect it to be by 10% or more.

Do you anticipate increasing your firm's North American production?



If you are adding North American capacity, what are the reasons?



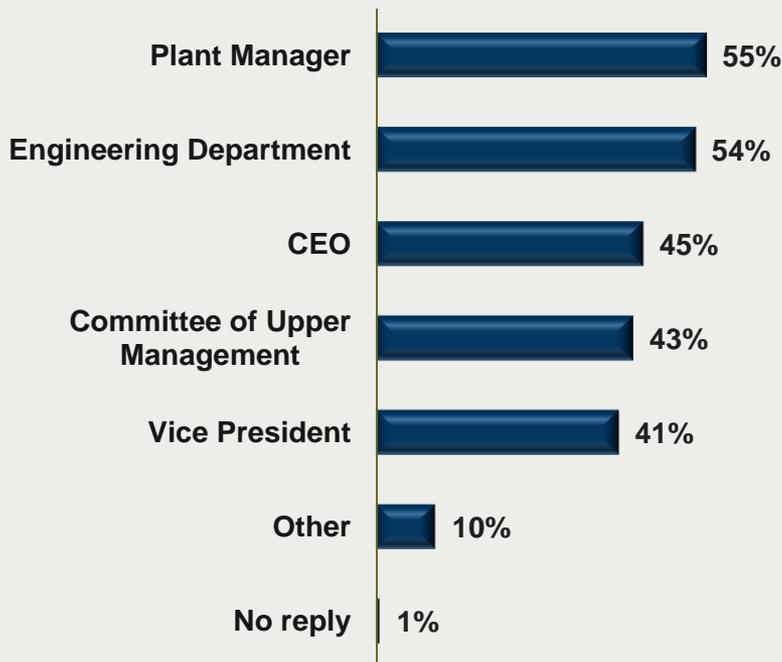
Base for chart on left: all respondents (n=342)

Base for chart on right: Respondents who plan to increase North American production (n=203); multiple responses allowed on chart to right.

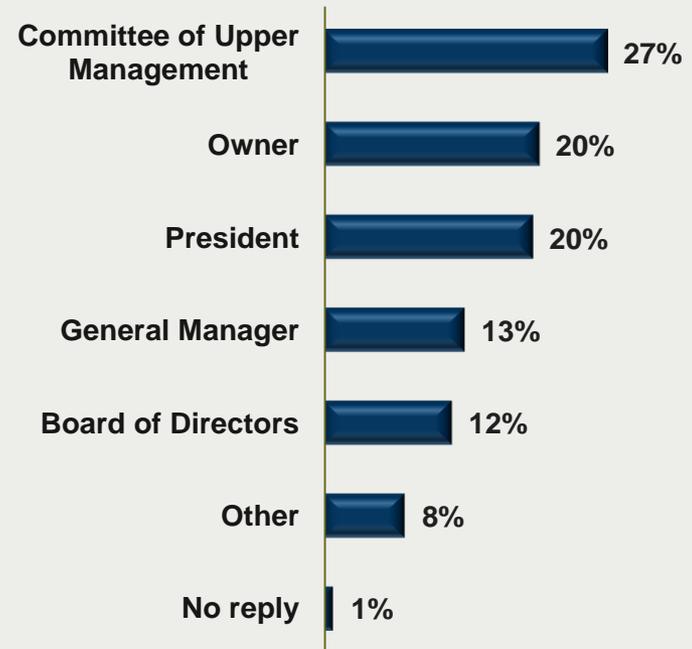
RESEARCH FINDINGS

Various positions have input into equipment buying decisions. The final decision is often made by a committee of upper management or a single executive within the company. Understandably, decision-making varies by company size, as higher-level positions (Owner, CEO, etc.) at smaller companies are likely involved in decisions, while lower level positions (plant manager, engineering department, etc.) at large companies are more likely involved in decisions.

Which people (positions) at your firm have input into decisions on buying equipment?



Who has the final decision-making authority on buying equipment?

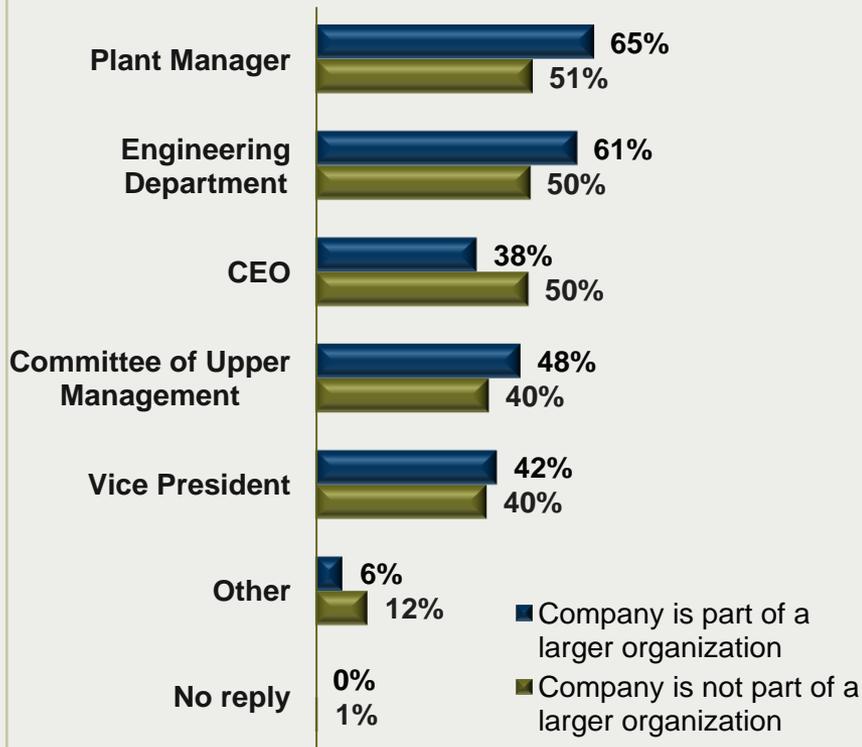


Base for both charts: all respondents (n=342); multiple responses allowed on chart to left.

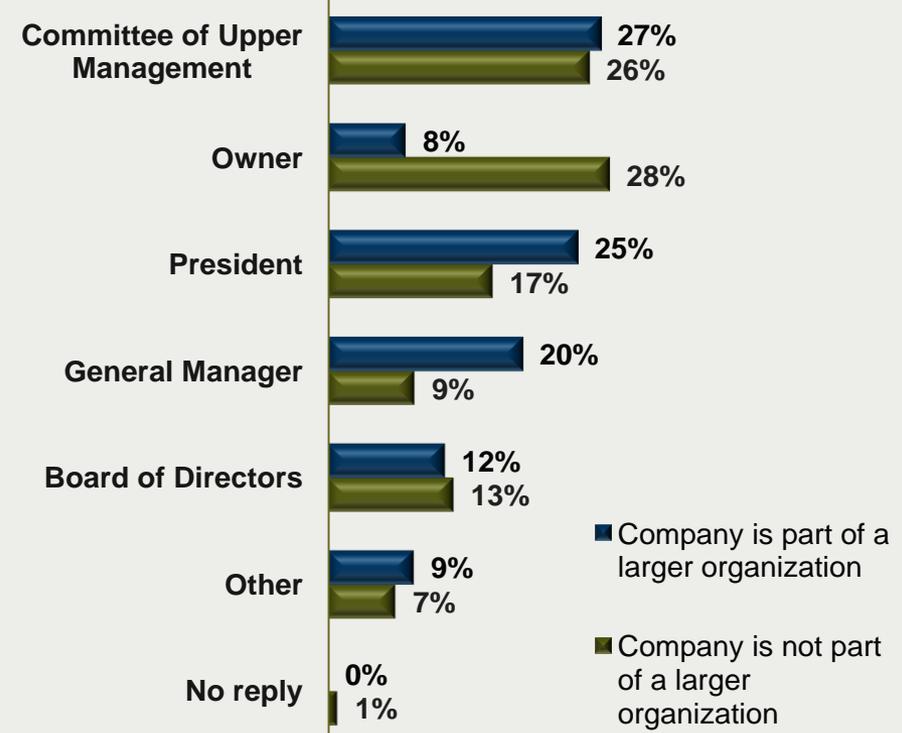
RESEARCH FINDINGS

Owners and General Managers are more likely to have final decision-making authority when the company is a subsidiary or part of a larger organization. The owner is more likely to have final authority when there is no parent organization. Involvement in decisions does not vary as greatly.

Which people (positions) at your firm have input into decisions on buying equipment?



Who has the final decision-making authority on buying equipment?

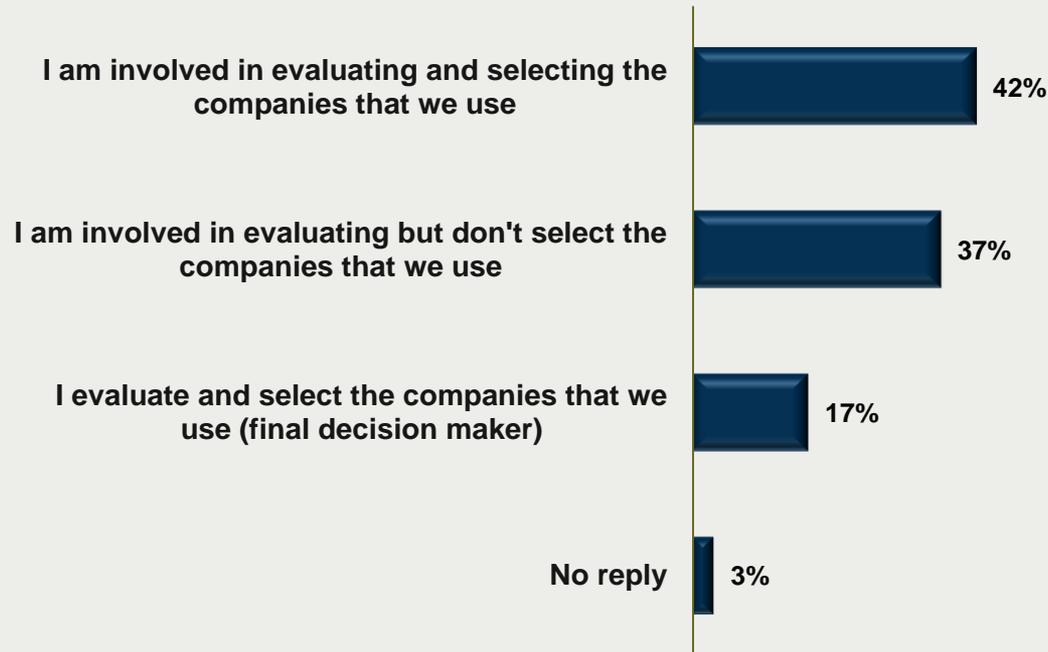


Base for both charts: all respondents (n=342); multiple responses allowed on chart to left.

RESEARCH FINDINGS

The majority of respondents are involved in evaluating suppliers and producers of equipment and machinery for their company.

Which of the following statements best describes your involvement in evaluating suppliers and producers of construction/manufacturing equipment and machinery in your company?

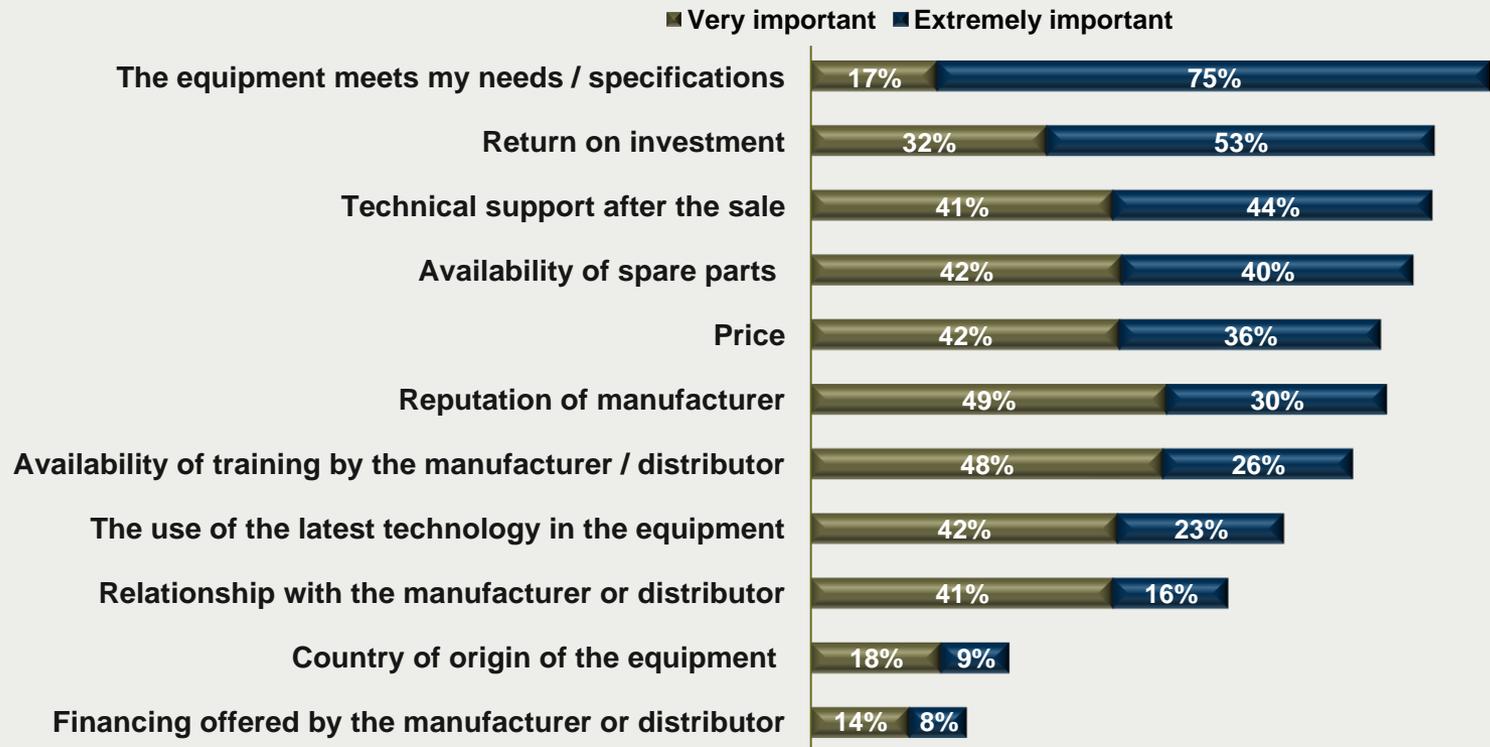


Base for both charts: all respondents (n=342).

RESEARCH FINDINGS

While the ability of equipment to meet needs/specification is most important when making purchasing decisions, several attributes rate as highly important during the decision-making process.

How important are the following attributes when deciding to purchase equipment?

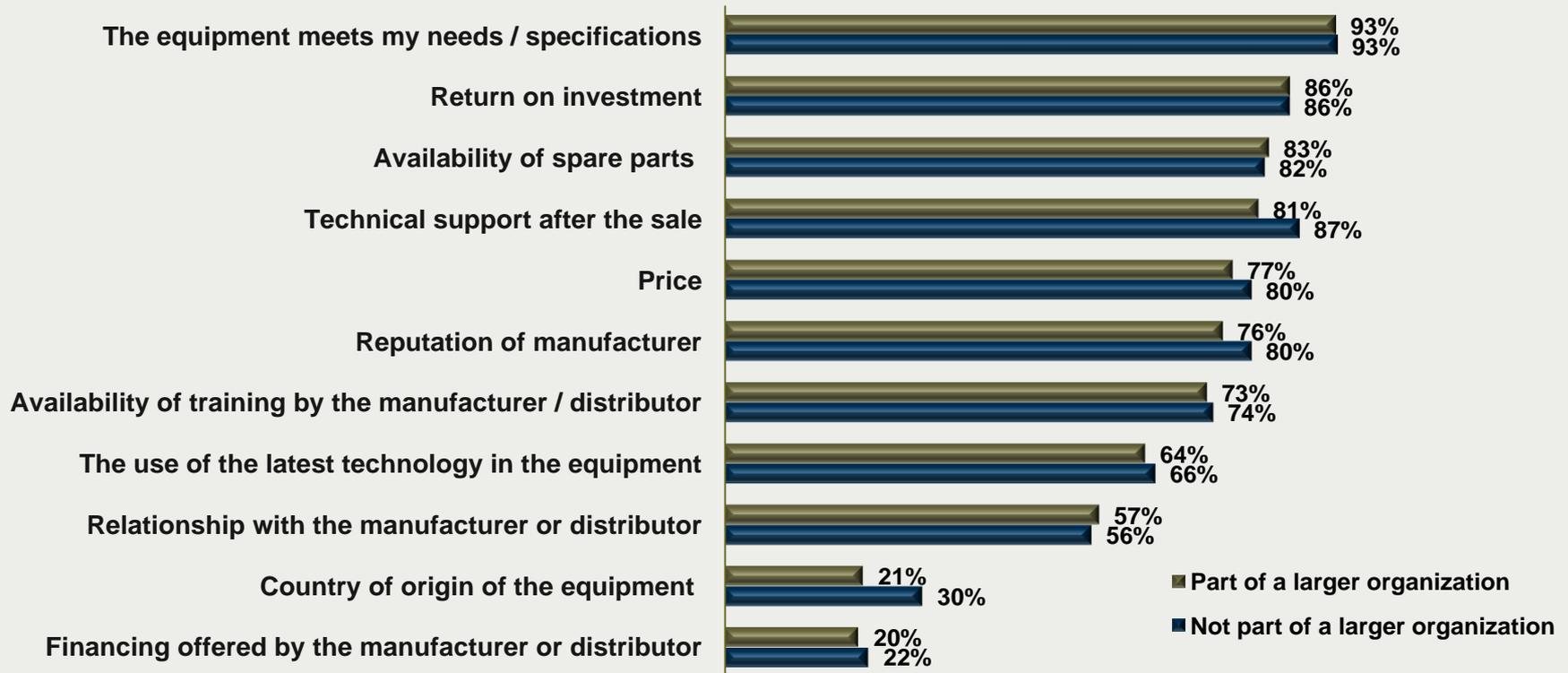


Base : all respondents (n=342).

RESEARCH FINDINGS

The important attributes when making purchase decisions does not vary greatly for companies that are part of a larger organization and those that are not.

**How important are the following attributes when deciding to purchase equipment?
Percentage indicating “very” or “extremely” important are presented.**

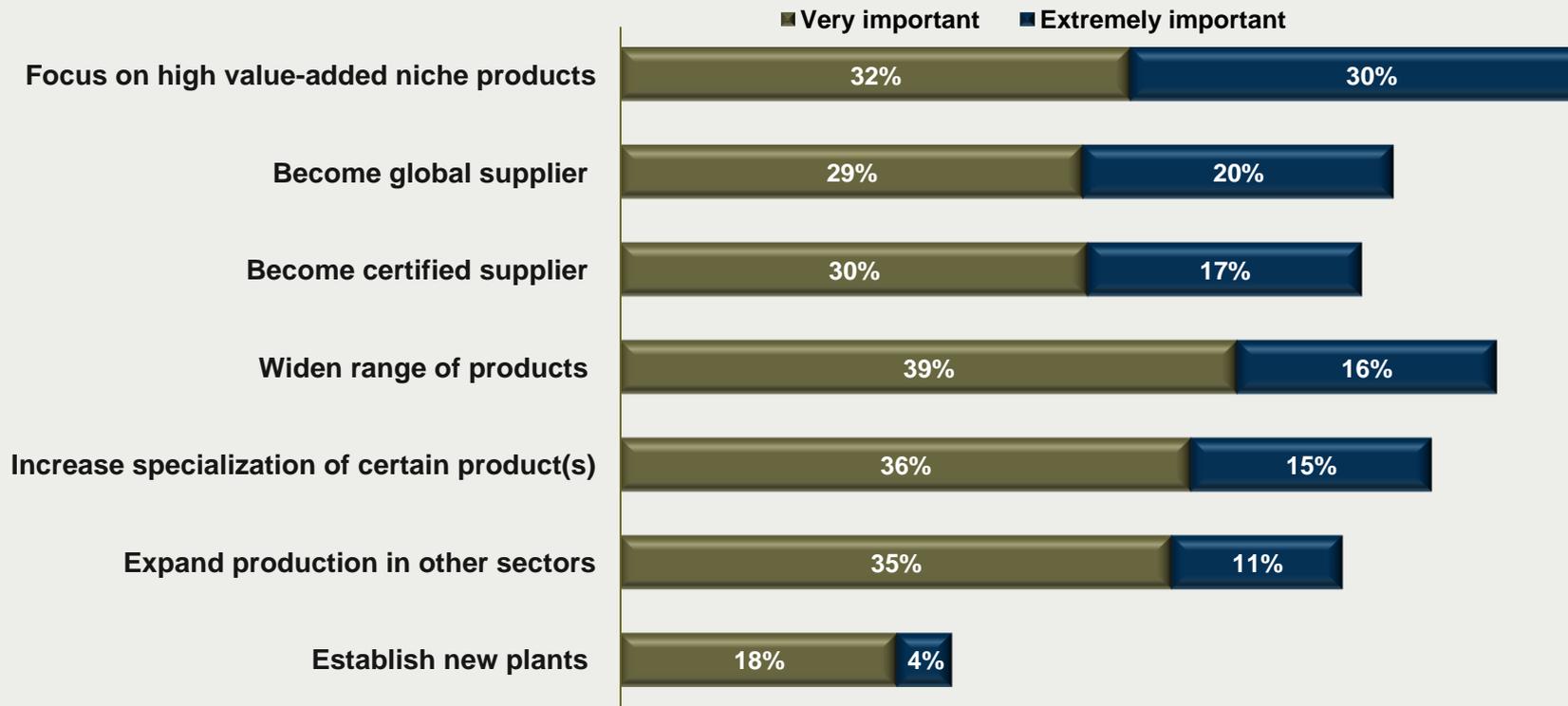


Base : all respondents (n=342).

RESEARCH FINDINGS

The majority of respondents indicate a focus on high value-added niche products is an extremely or very important strategic target for their company. Establishing new plants is considered least important.

How important are the following strategic targets to your company?



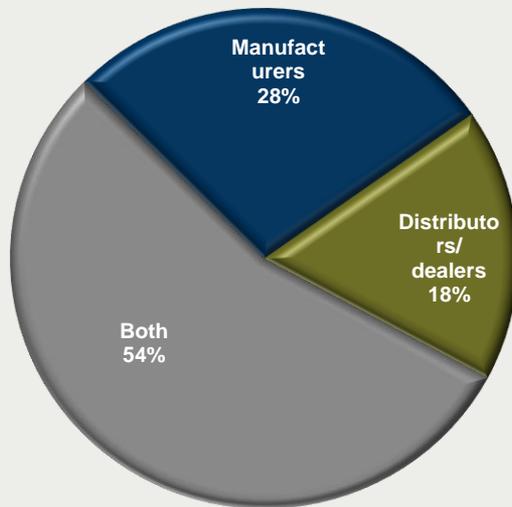
Base : all respondents (n=342).

RESEARCH FINDINGS

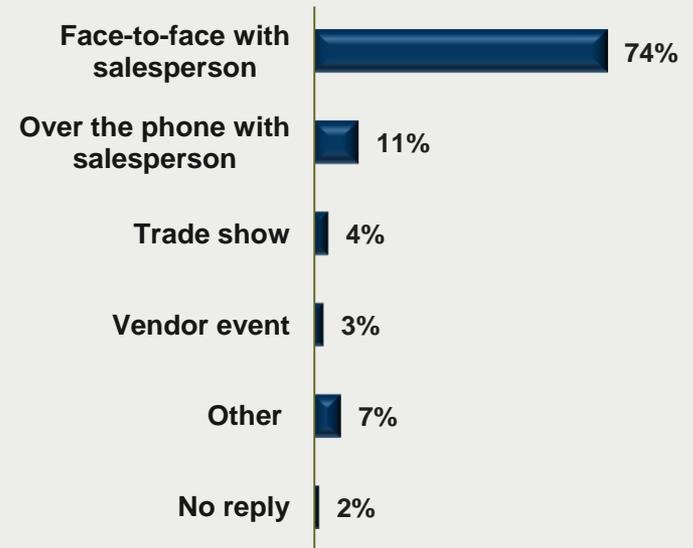
Respondents work with both manufacturers and distributor dealers when obtaining equipment. Most purchase decisions are made in a face-to-face setting with a salesperson. Manufacturing sales reps are considered the most credible source on industry equipment.

While only 4% of respondents make major purchasing decisions at a trade show, they are a source of information. In fact 35% of respondents had specific plans to attend one or more shows. Of those respondents, the largest percentage plan to attend IMTS (15%) or Fabtech (8%)

When obtaining manufacturing equipment, does your company PRIMARILY deal directly with the manufacturer or do you deal with distributors and dealers?



In what setting does your company make the majority of its purchasing decisions?

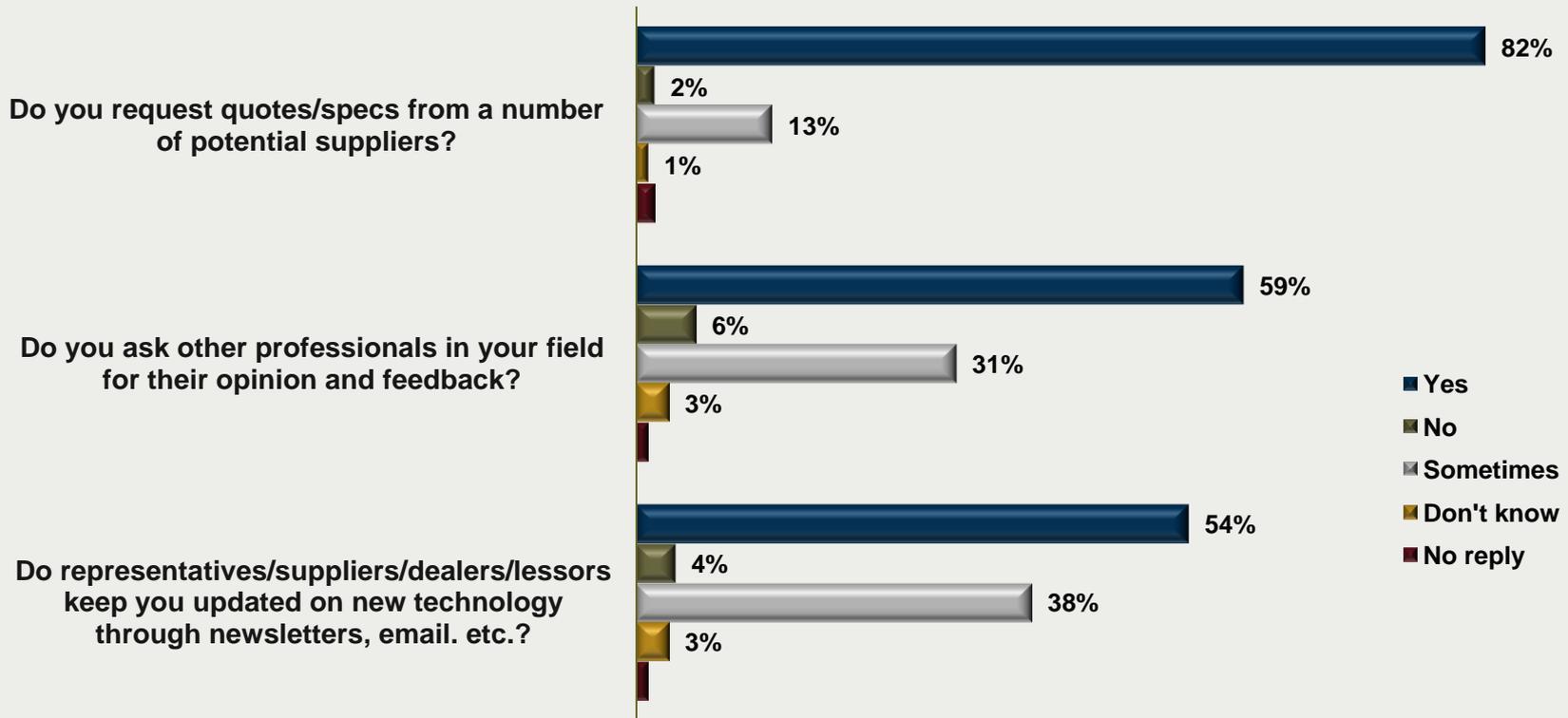


Base: for both charts all respondents (n=342).

RESEARCH FINDINGS

Respondents are likely to request quotes/specs from a number of potential suppliers, as well as asking other professionals in their field for feedback. Respondents are less likely to automatically upgrade their current brand of products without researching other solutions.

Please respond to the following questions regarding your current decision making process when buying machinery and equipment.

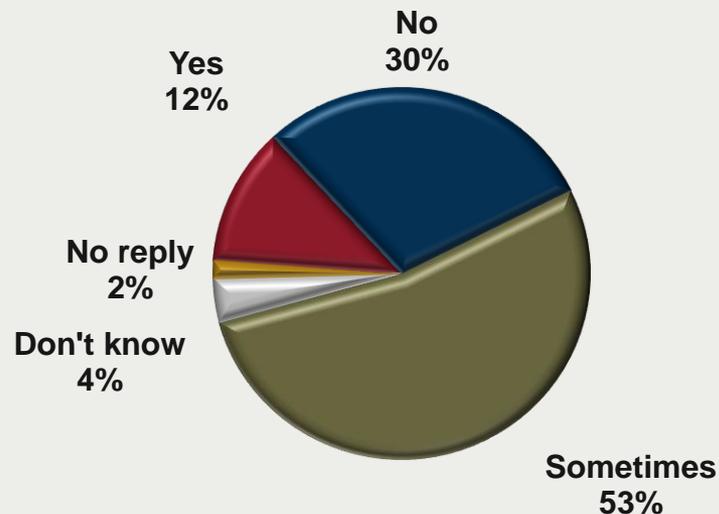


Base: all respondents (n=342); multiple answers.

RESEARCH FINDINGS

Respondents are not likely to automatically upgrade their current brand of products without researching other solutions.

Do you buy only the latest products from the brand you have now?

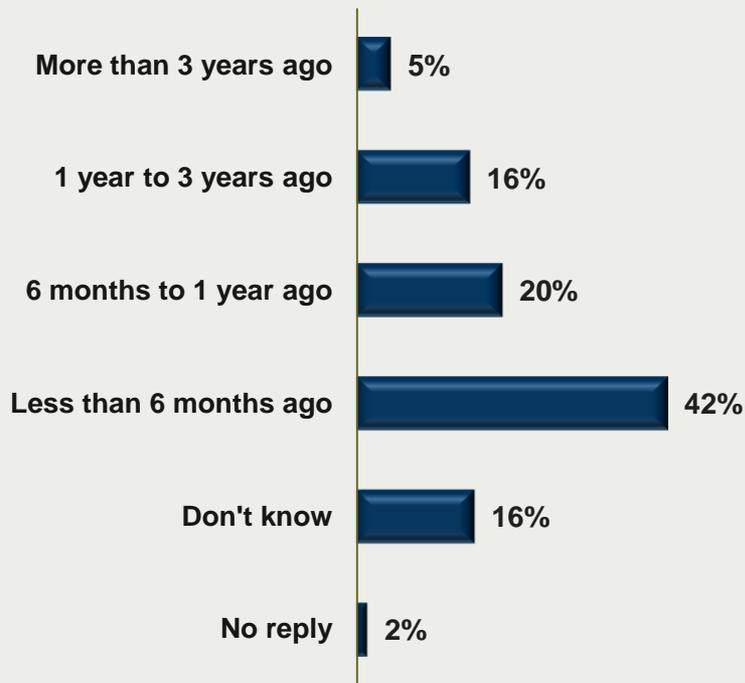


Base: all respondents (n=342); multiple answers.

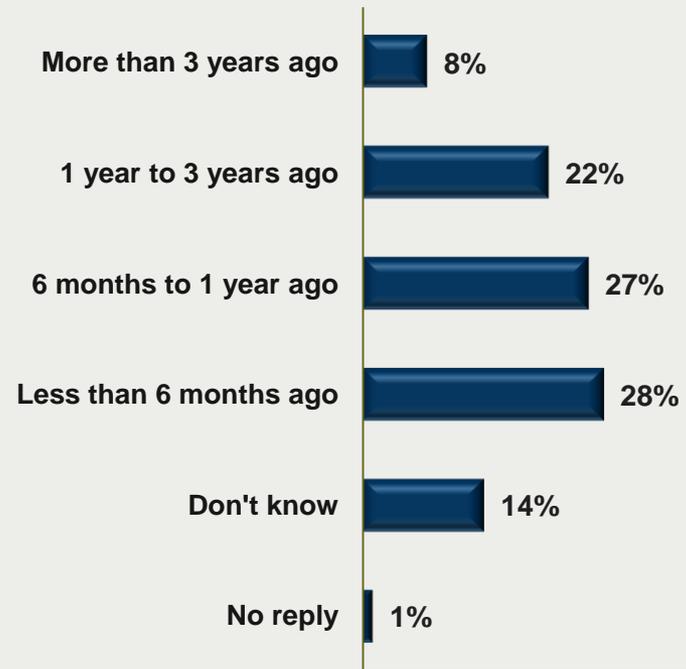
RESEARCH FINDINGS

Respondent companies have likely purchased machines or equipment in the past year. In fact, 62% bought a machine or equipment in the last year. A new piece of equipment has likely transformed the efficiency or effectiveness of operations within the past three years. In fact, 28% of respondents have found a good ROI from new equipment or machinery in the last six months.

When was the last time your company bought a machine or equipment?



When was the last time a new piece of equipment transformed the efficiency or effectiveness by which your division/company operates?



Base for both charts: all respondents (n=342).

RESEARCH FINDINGS

Respondent companies have likely purchased machines or equipment in the past year. In fact, 62% bought a machine or equipment in the last year. A new piece of equipment has likely transformed the efficiency or effectiveness of operations within the past three years.

What was the country of origin?

Number of mentions for each country to the open-ended question are presented below.

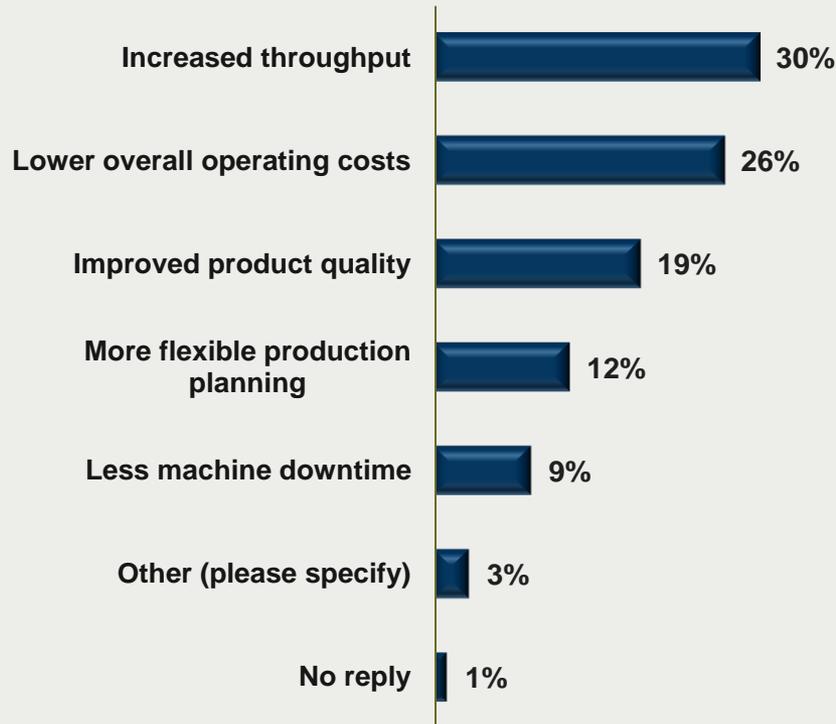
Country	Number of mentions		Country	Number of mentions
U.S.A.	141		Netherlands	2
Japan	34		Asia	1
Germany	26		Australia	1
Italy	11		Brazil	1
China	8		Denmark	1
Canada	4		Europe	1
Switzerland	4		France	1
India	4		Iran	1
Taiwan	3		Spain	1
Austria	2		Sweden	1
Korea	2			

Base for both charts: all respondents (n=342).

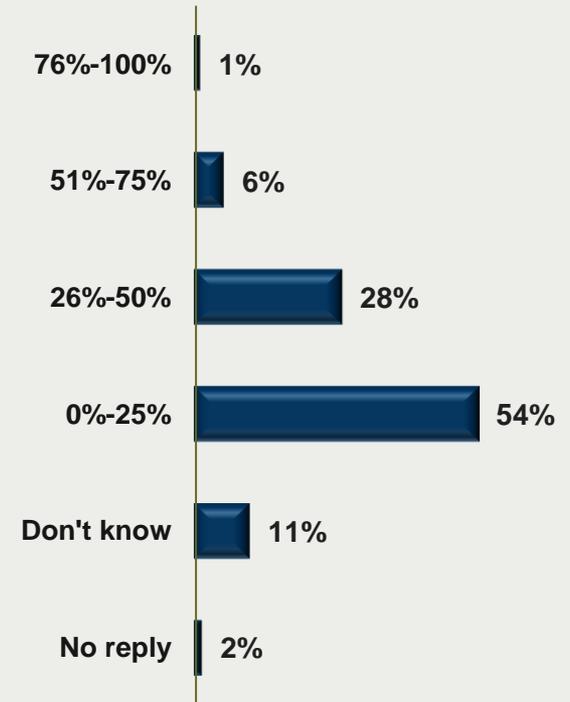
RESEARCH FINDINGS

The greatest benefits of new equipment are increased throughput and lower operating costs. More than one third of respondents report that the average equipment purchase results in an improvement of more than 25%. Over the next two fiscal years, 35% of respondents expect to spend \$1 million or more on equipment.

From your perspective, what is the biggest benefit from the purchase of new equipment?



What is the average percentage of improvement from the purchase of new equipment?

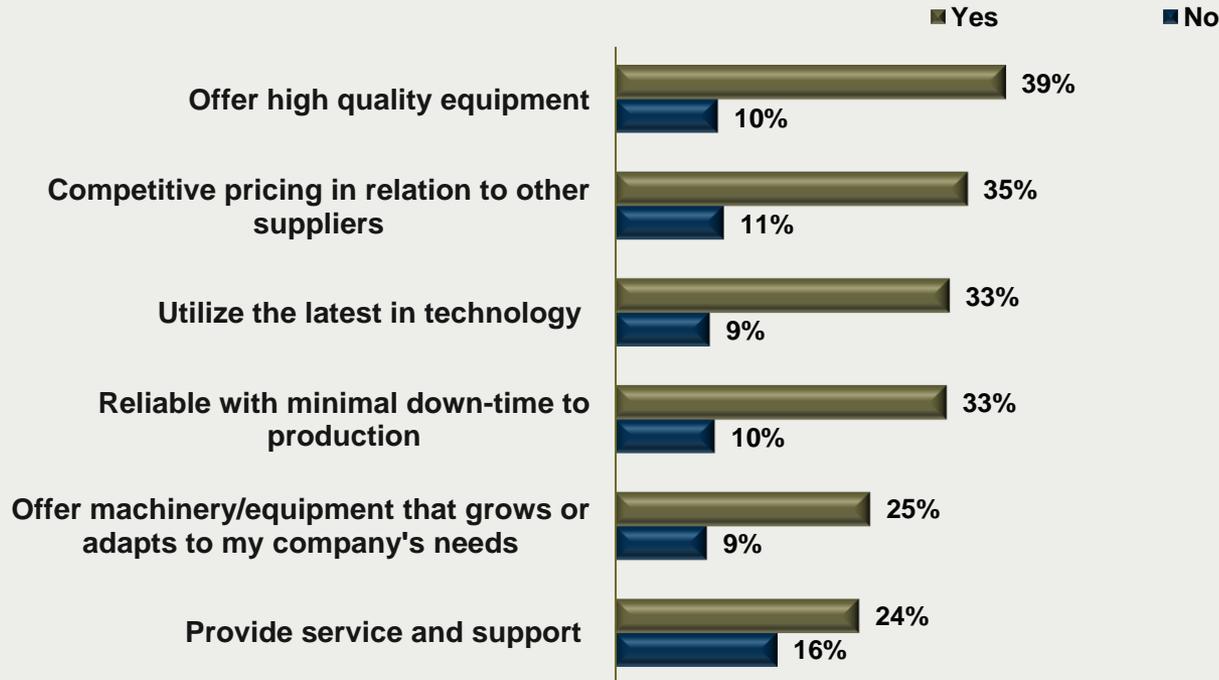


Base for both charts: all respondents (n=342).

RESEARCH FINDINGS

Respondents familiar with the source likely associate high quality and competitive pricing with Italian machines and equipment. For each perception point, respondents are more likely to agree than disagree that the trait describes Italian manufacturers. About half of respondents are not familiar enough with Italian manufacturers to have an opinion.

What is your general perception of Italian suppliers of machinery and equipment?

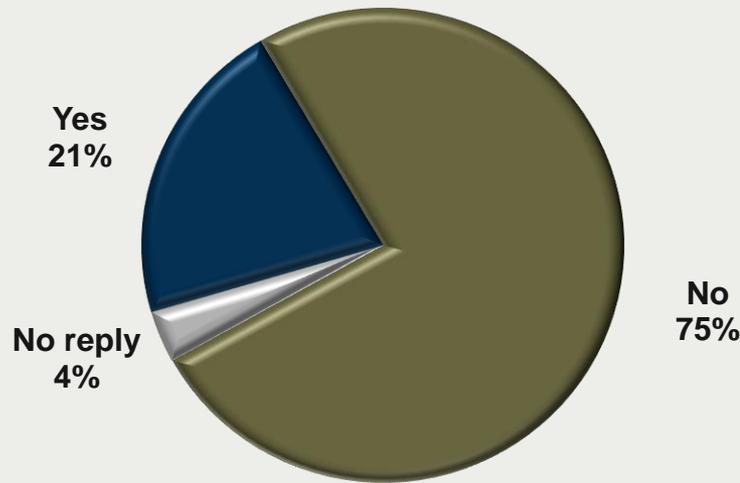


Base : all respondents (n=342).

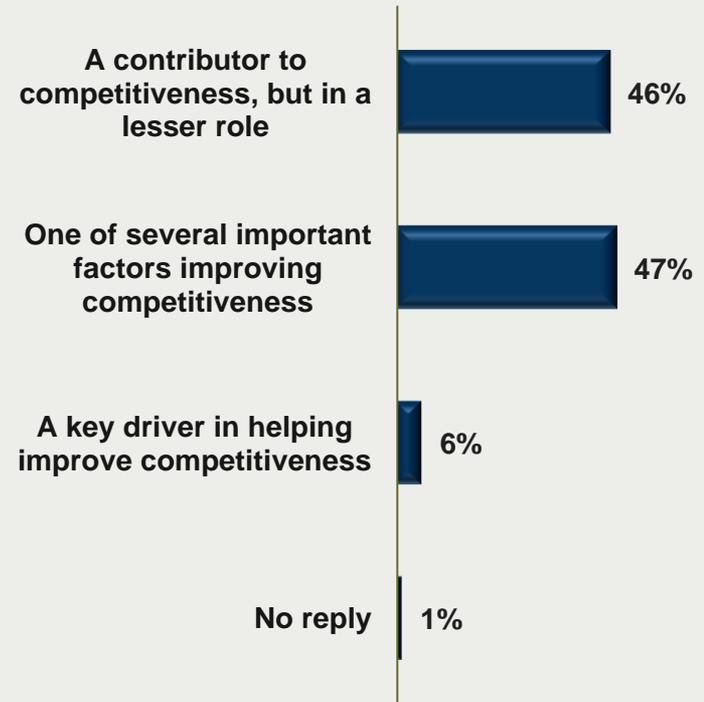
RESEARCH FINDINGS

About one in five respondents currently use Italian machinery. Those who do believe that Italian automation/robotics has played at least some role in improving their company's competitiveness.

Does your company currently use Italian machinery and equipment?



How would you characterize the role Italian automation/robotics has played in improving your company's competitiveness?



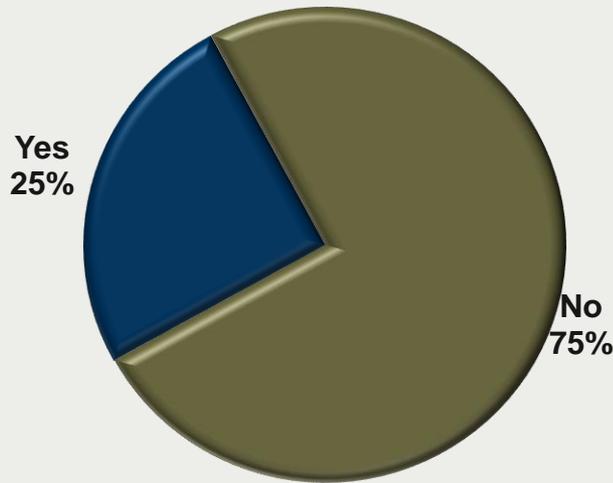
Base for chart on left: all respondents (342).

Base for chart on right: who currently use Italian machines(n=72).

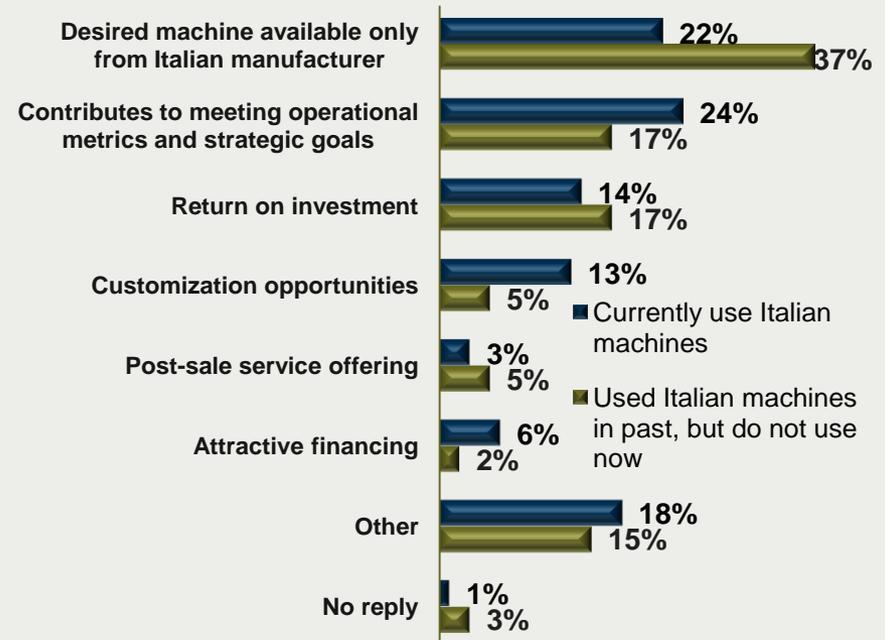
RESEARCH FINDINGS

One in four respondents who do not currently use Italian machinery or technology have done so in the past. These respondents likely chose an Italian manufacturer because the desired machine was available only from an Italian manufacturer, or because the machine contributed to meeting operational and strategic goals. Respondents who specified “other” responses were not likely involved in the purchase decision.

Have you ever used Italian machinery or technology in the past?



Why did you choose an Italian manufacturer to meet your company's needs?



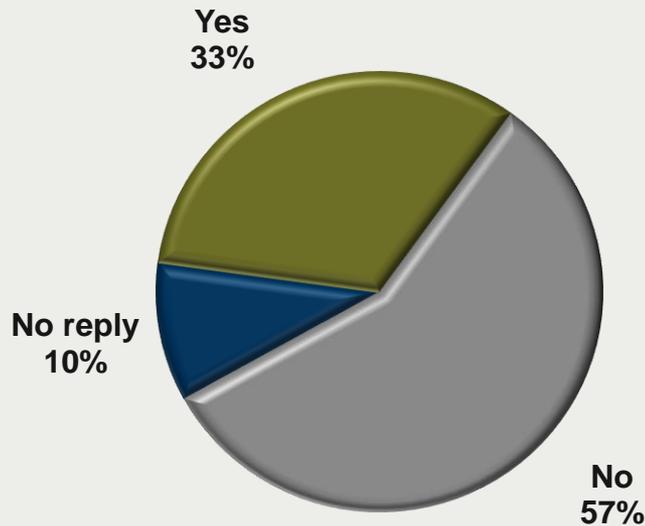
Base for chart on left: respondents not currently using Italian machinery (n=258).

Base for chart on right: respondents who currently use or have previously used Italian machinery (n=137).

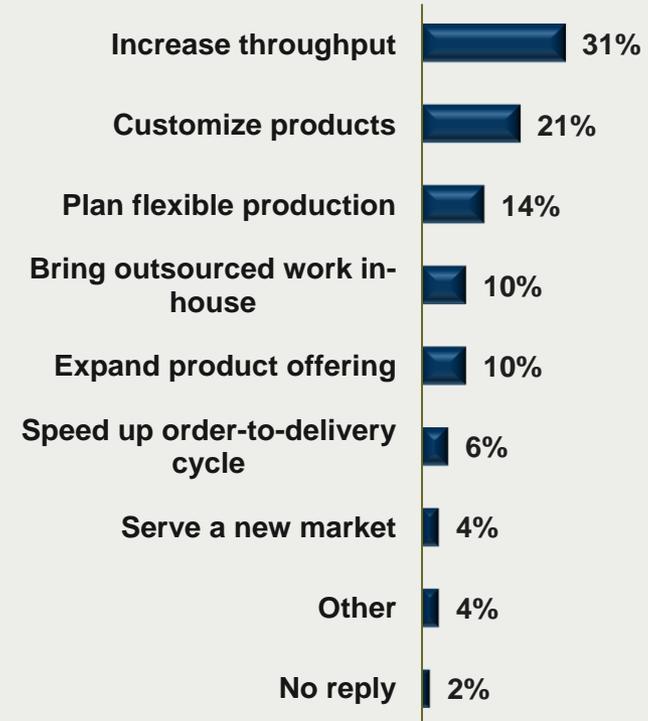
RESEARCH FINDINGS

One in three respondents who currently or have previously used Italian machines indicate the equipment allowed them to do something they could not previously do – most likely increasing throughput or customizing products.

Does Italian machinery allow you to do something today that your company could not do before you acquired the equipment?



If yes, what would that be?



Base for chart on left: respondents who currently or have previously use Italian machinery (n=137).

Base for chart on right: respondents indicate Italian machinery allows them to do something they could not previously do (n=52).

RESEARCH FINDINGS

Italian machines are known for their quality, flexibility and responsiveness. As seen on page 29, one in three respondents can do something today that their company could not do before acquiring the Italian equipment.

If your company uses Italian machinery, what are some of the strengths of the Italian-made equipment your company uses?



Base : respondents who currently or previously used Italian machines (n=137).

RESEARCH FINDINGS

Respondents would be willing to meet with Italian manufacturers, either in the U.S., or overseas if expenses were paid.

If all expenses were paid for, would you be willing to travel overseas to visit the companies that make high performance machinery and equipment to see it in action?
If Italian companies that make high performance machinery and equipment came to the US, would you be willing to meet them?

If Italian companies that make high performance machinery and equipment came to the US, would you be willing to meet them?

264 respondents

77%

If all expenses were paid for, would you be willing to travel overseas to visit the companies that make high performance machinery and equipment to see it in action?

253 respondents

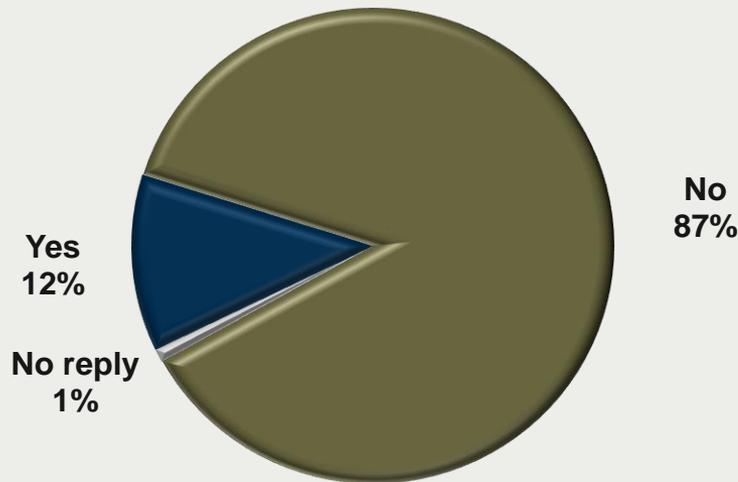
74%

Base : all respondents (n=342); multiple answers.

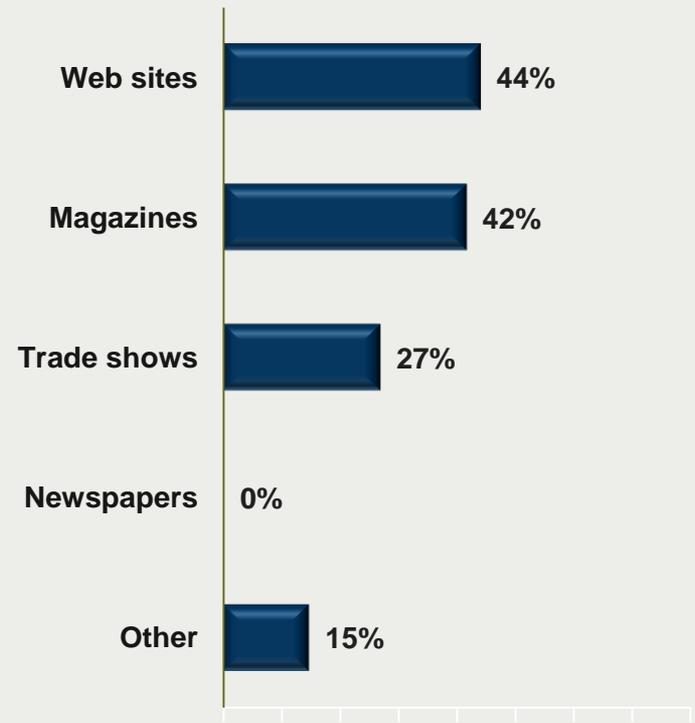
RESEARCH FINDINGS

Over one in ten respondents are aware of the Machines Italia campaign. Most were made aware of the campaign through websites or magazines. 42% indicate this awareness has changed their view or impression of Italian machinery manufacturers.

Are you aware of the Machines Italia campaign?



How have you been made aware of the Machines Italia campaign?



Base for chart on left: all respondents (n=342).

Base for chart on right: respondents aware of the campaign (n=41).

1. Which of the following best describes your job title or function?

Base: all respondents.	342
No reply	6 1.8%
CEO, CFO, COO	44 12.9%
VP, divisional, regional, functional, units, etc.	42 12.3%
Operations manager	53 15.5%
Plant manager	17 5.0%
Purchasing manager/buyer	23 6.7%
Other (please specify)	157 45.9%

2. How many people are employed by your company at all locations?

Base: all respondents.	342
No reply	2 0.6%
One	12 3.5%
2 to 5	21 6.1%
6 to 10	8 2.3%
11 to 25	28 8.2%
26 to 50	14 4.1%
51 to 100	26 7.6%
101 to 500	70 20.5%
501 to 1,000	23 6.7%
More than 1,000	138 40.4%

3. Is your company a subsidiary of a larger organization/corporation?

Base: all respondents.	342
No reply	8 2.3%
Yes	128 37.4%
No	206 60.2%

Data Tables

3a. If yes, does this corporate arrangement affect your purchase decisions regarding automation and robotics?

Base: respondents whose companies are part of a larger operation.	128
No reply	-
Yes	66 51.6%
No	62 48.4%

5. Has your business improved over the past 24 months?

Base: all respondents.	342
No reply	2 0.6%
Yes	236 69.0%
No	104 30.4%

5a. If yes, by how much?

Base: respondents whose business has improved.	236
No reply	4 1.7%
Less than 5%	47 19.9%
5% to 9.9%	100 42.4%
10% to 19.9%	58 24.6%
20% or more	27 11.4%

6. Does your company compete in global markets?

Base: all respondents.	342
No reply	5 1.5%
Yes	250 73.1%
No	87 25.4%

6a. Has automated equipment or robotics helped your firm compete in global markets?

Base: all respondents.	250
No reply	3 1.2%
Yes	157 62.8%
No	90 36.0%

7. How would you characterize the extent of your company's use of robotics and automation?

Base: all respondents.	342
No reply	- -
Do not use at all	71 20.8%
Minimal use	127 37.1%
Moderate use	109 31.9%
Extensive use	35 10.2%

8. Do you plan to expand the use of automation beyond the current level?

Base: all respondents.	271
No reply	3 1.1%
Yes	185 68.3%
No	83 30.6%

8a. If so, by how much?

Base: respondents who plan to expand use of automation.	185
No reply	1 0.5%
Less than 10%	59 31.9%
10% to 24%	99 53.5%
25% to 49%	20 10.8%
50% to 100%	4 2.2%
Use will more than double	2 1.1%

Data Tables

9. What are the benefits of automation and robotics in terms of helping your firm become more competitive?

Base: all respondents; multiple answers.	271
No reply	1 0.4%
More innovative methods	70 25.8%
Improved quality	140 51.7%
Greater efficiency	203 74.9%
Reduced waste	102 37.6%
Labor costs lower	151 55.7%
None of the above	10 3.7%

10. In order to accommodate greater use of automation and robotics, have you had to expand the skill level of your workforce?

		How would you characterize the extent of your company's u...				
		No reply	Do not use at all	Minimal use	Moderate use	Extensive use
Base: all respondents; multiple answers.	342	-	71	127	109	35
No reply	-	-	-	-	-	-
Yes	202 59.1%	-	13 18.3%	76 59.8%	86 78.9%	27 77.1%
No	140 40.9%	-	58 81.7%	51 40.2%	23 21.1%	8 22.9%

10a. If so, by how much?

		How would you characterize the extent of your company's u...			
		Do not use at all	Minimal use	Moderate use	Extensive use
Base: respondents who have expanded skill level of workforce.	202	13	76	86	27
No reply	1 0.5%	-	-	1 1.2%	-
Significantly	40 19.8%	7 53.8%	17 22.4%	12 14.0%	4 14.8%
Moderately	116 57.4%	4 30.8%	38 50.0%	55 64.0%	19 70.4%
Minimally	45 22.3%	2 15.4%	21 27.6%	18 20.9%	4 14.8%

11. Do you anticipate increasing your firm's North American production?

Base: all respondents.	342
No reply	1 0.3%
Yes	203 59.4%
No	138 40.4%

11a. If so, by how much?

Base: respondents who plan to increase North American production.	203 100.0%
No reply	1 0.5%
Less than 5%	39 19.2%
5% to 9%	85 41.9%
10% to 24%	60 29.6%
25% or more	18 8.9%

11b. If you are adding North American capacity, what are the reasons?

Base: respondents who plan to increase North American production.	203 100.0%
No reply	6 3.0%
Meet needs of expanding market	149 73.4%
Want production closer to key markets	33 16.3%
New equipment helps reduce costs	58 28.6%
New equipment helps improve product quality	48 23.6%
Other (please specify)	7 3.4%

12. Which people (positions) at your firm have input into decisions on buying equipment?

Base: all respondents; multiple answers.	342
No reply	2 0.6%
CEO	153 44.7%
Committee of Upper Management	147 43.0%
Plant Manager	189 55.3%
Vice President	139 40.6%
Engineering Department	183 53.5%
Other (please specify)	34 9.9%

13. Who has the final decision-making authority on buying equipment?

Base: all respondents.	342
No reply	3 0.9%
Board of Directors	41 12.0%
Committee of Upper Management	91 26.6%
General Manager	45 13.2%
Owner	69 20.2%
President	67 19.6%
Other (please specify)	26 7.6%

14. Which of the following statements best describes your involvement in evaluating suppliers and producers of construction/manufacturing equipment and machinery in your company?

Base: all respondents.	342
No reply	11 3.2%
I evaluate and select the companies that we use	59 17.3%
I am involved in evaluating and selecting the companies that we use	145 42.4%
I am involved in evaluating but don't select the companies that we use	127 37.1%



15. How important are the following attributes when deciding to purchase equipment?

	Base: all respondents.	No reply	Not at all important	Somewhat important	Very important	Extremely important	Don't know
Price	342	14 4.1%	4 1.2%	52 15.2%	144 42.1%	122 35.7%	6 1.8%
Return on investment	342	15 4.4%	1 0.3%	28 8.2%	110 32.2%	181 52.9%	7 2.0%
Reputation of manufacturer	342	7 2.0%	3 0.9%	57 16.7%	166 48.5%	103 30.1%	6 1.8%
Technical support after the sale	342	16 4.7%	4 1.2%	27 7.9%	141 41.2%	149 43.6%	5 1.5%
Relationship with the manufacturer or distributor	342	3 0.9%	14 4.1%	121 35.4%	141 41.2%	54 15.8%	9 2.6%
Financing offered by the manufacturer or distributor	342	4 1.2%	125 36.5%	124 36.3%	46 13.5%	27 7.9%	16 4.7%
Availability of spare parts	342	10 2.9%	3 0.9%	40 11.7%	145 42.4%	136 39.8%	8 2.3%
Availability of training by the manufacturer / distributor	342	8 2.3%	5 1.5%	69 20.2%	164 48.0%	89 26.0%	7 2.0%
Country of origin of the equipment	342	4 1.2%	68 19.9%	166 48.5%	61 17.8%	32 9.4%	11 3.2%
The use of the latest technology in the equipment	342	7 2.0%	16 4.7%	92 26.9%	143 41.8%	78 22.8%	6 1.8%
The equipment meets my needs / specifications	342	6 1.8%	2 0.6%	8 2.3%	59 17.3%	258 75.4%	9 2.6%

16. How important are the following strategic targets to your company?

	Base: all respondents.	No reply	Not at all important	Somewhat important	Very important	Extremely important	Don't know
Increase specialization of certain product(s)	342	10 2.9%	24 7.0%	113 33.0%	123 36.0%	52 15.2%	20 5.8%
Become certified supplier	342	14 4.1%	63 18.4%	82 24.0%	101 29.5%	59 17.3%	23 6.7%
Become global supplier	342	9 2.6%	52 15.2%	97 28.4%	100 29.2%	67 19.6%	17 5.0%
Focus on high value-added niche products	342	5 1.5%	21 6.1%	84 24.6%	110 32.2%	104 30.4%	18 5.3%
Widen range of products	342	5 1.5%	27 7.9%	106 31.0%	133 38.9%	56 16.4%	15 4.4%
Expand production in other sectors	342	6 1.8%	55 16.1%	105 30.7%	119 34.8%	37 10.8%	20 5.8%
Establish new plants	342	8 2.3%	152 44.4%	88 25.7%	60 17.5%	12 3.5%	22 6.4%

17. When obtaining manufacturing equipment, does your company **PRIMARILY** deal directly with the manufacturer or do you deal with distributors and dealers?

Base: all respondents.	342
No reply	3 0.9%
Manufacturers	94 27.5%
Distributors/dealers	60 17.5%
Both	185 54.1%

Data Tables

18. In what setting does your company make the majority of its purchasing decisions?

Base: all respondents.	342
No reply	5 1.5%
Trade show	13 3.8%
Vendor event	9 2.6%
Face-to-face with salesperson	252 73.7%
Over the phone with salesperson	39 11.4%
Other (please specify)	24 7.0%

19. Which of the following sources do you think is the most credible for providing you with information on construction/manufacturing equipment for your industry?

Base: all respondents.	342
No reply	7 2.0%
Distributors' sales representatives	62 18.1%
Leasing companies' sales representatives	4 1.2%
Manufacturing sales representatives	229 67.0%
None of the above	40 11.7%



Data Tables

20. Please respond to the following questions regarding your current decision making process when buying machinery and equipment. Do you buy only the latest products from the brand you have now?

Base: all respondents.	342
No reply	5 1.5%
Yes	41 12.0%
No	101 29.5%
Sometimes	182 53.2%
Don't know	13 3.8%

20. Please respond to the following questions regarding your current decision making process when buying machinery and equipment. Do you request quotes/specs from a number of potential suppliers?

Base: all respondents.	342
No reply	6 1.8%
Yes	281 82.2%
No	6 1.8%
Sometimes	45 13.2%
Don't know	4 1.2%

Data Tables

20. Please respond to the following questions regarding your current decision making process when buying machinery and equipment. Do you ask other professionals in your field for their opinion and feedback?

Base: all respondents.	342
No reply	4 1.2%
Yes	201 58.8%
No	20 5.8%
Sometimes	106 31.0%
Don't know	11 3.2%

20. Please respond to the following questions regarding your current decision making process when buying machinery and equipment. Do representatives/suppliers/dealers/lessors keep you updated on new technology through newsletters, email. etc.?

Base: all respondents.	342
No reply	4 1.2%
Yes	183 53.5%
No	13 3.8%
Sometimes	131 38.3%
Don't know	11 3.2%

21. From your perspective, what is the biggest benefit from the purchase of new equipment?

Base: all respondents.	342
No reply	4 1.2%
Lower overall operating costs	90 26.3%
Increased throughput	101 29.5%
Less machine downtime	30 8.8%
Improved product quality	64 18.7%
More flexible production planning	42 12.3%
Other (please specify)	11 3.2%

22. What is the average percentage of improvement from the purchase of new equipment?

Base: all respondents.	342
No reply	5 1.5%
0%-25%	183 53.5%
26%-50%	95 27.8%
51%-75%	19 5.6%
76%-100%	4 1.2%
Don't know	36 10.5%

Data Tables

23. When was the last time a new piece of equipment transformed the efficiency or effectiveness by which your division/company operates?

Base: all respondents.	342
No reply	4 1.2%
Less than 6 months ago	97 28.4%
6 months to 1 year ago	91 26.6%
1 year to 3 years ago	75 21.9%
More than 3 years ago	26 7.6%
Don't know	49 14.3%

24. What are your company's expected expenditures for equipment over the next two fiscal years?

Base: all respondents.	342
No reply	12 3.5%
Less than \$100,000	71 20.8%
\$100,000 to \$499,999	82 24.0%
\$500,000 to \$999,999	57 16.7%
\$1 million to \$4.9 million	68 19.9%
\$5 million or more	52 15.2%

25. When was the last time your company bought a machine or equipment?

Base: all respondents.	342
No reply	5 1.5%
Less than 6 months ago	145 42.4%
6 months to 1 year ago	68 19.9%
1 year to 3 years ago	53 15.5%
More than 3 years ago	16 4.7%
Don't know	55 16.1%

27. What is your general perception of Italian suppliers of machinery and equipment?

	Base: all respondents.	No reply	Yes	No	Don't know
Reliable with minimal down-time to production	342	9 2.6%	113 33.0%	34 9.9%	186 54.4%
Competitive pricing in relation to other suppliers	342	11 3.2%	120 35.1%	37 10.8%	174 50.9%
Provide service and support	342	15 4.4%	83 24.3%	55 16.1%	189 55.3%
Offer high quality equipment	342	11 3.2%	133 38.9%	35 10.2%	163 47.7%
Utilize the latest in technology	342	10 2.9%	114 33.3%	32 9.4%	186 54.4%
Offer machinery/equipment that grows or adapts to my company's needs	342	12 3.5%	87 25.4%	31 9.1%	212 62.0%

28. Does your company currently use Italian machinery and equipment?

Base: all respondents.	342
No reply	12 3.5%
Yes	72 21.1%
No	258 75.4%

29. How would you characterize the role Italian automation/robotics has played in improving your company's competitiveness?

Base: all respondents.	72
No reply	1 1.4%
A key driver in helping improve competitiveness	4 5.6%
One of several important factors improving competitiveness	34 47.2%
A contributor to competitiveness, but in a lesser role	33 45.8%

30. Have you ever used Italian machinery or technology in the past?

Base: all respondents.	258
No reply	- -
Yes	65 25.2%
No	193 74.8%

32. Why did you choose an Italian manufacturer to meet your company's needs?

Base: all respondents.	137
No reply	3 2.2%
Return on investment	21 15.3%
Customization opportunities	12 8.8%
Attractive financing	5 3.6%
Post-sale service offering	5 3.6%
Desired machine available only from Italian manufacturer	40 29.2%
Contributes to meeting operational metrics and strategic goals	28 20.4%
Other, please specify	23 16.8%

Data Tables

33. If your company uses Italian machinery, what are some of the strengths of the Italian-made equipment your company uses?

Base: all respondents.	137
No reply	27 19.7%
Quality	27 19.7%
Ease of use	11 8.0%
Low maintenance	3 2.2%
Long life	15 10.9%
Supports flexibility and responsiveness	24 17.5%
Well designed	20 14.6%
Other, please specify	10 7.3%

33c Does Italian machinery allow you to do something today that your company could not do before you acquired the equipment?

Base: all respondents.	137
No reply	14 10.2%
Yes	45 32.8%
No	78 56.9%

34. If yes, what would that be?

Base: all respondents.	52
No reply	1 1.9%
Customize products	11 21.2%
Increase throughput	16 30.8%
Expand product offering	5 9.6%
Speed up order-to-delivery cycle	3 5.8%
Plan flexible production	7 13.5%
Bring outsourced work in-house	5 9.6%
Serve a new market	2 3.8%
Other, please specify	2 3.8%

35. If all expenses were paid for, would you be willing to travel overseas to visit the companies that make high performance machinery and equipment to see it in action?

Base: all respondents.	342
No reply	5 1.5%
Yes	253 74.0%
No	84 24.6%

Data Tables

36. If Italian companies that make high performance machinery and equipment came to the US, would you be willing to meet them?

Base: all respondents.	342
No reply	8 2.3%
Yes	264 77.2%
No	70 20.5%

37. Are you aware of the Machines Italia campaign?

Base: all respondents.	342
No reply	3 0.9%
Yes	41 12.0%
No	298 87.1%

38. How have you been made aware of the Machines Italia campaign?

Base: respondents aware of campaign; multiple answers.	41
No reply	-
Newspapers	-
Magazines	17 41.5%
Web sites	18 43.9%
Trade shows	11 26.8%
Other (please specify)	6 14.6%

39. Has your awareness through such means changed your view or impression of Italian machinery manufacturers?

Base: respondents aware of campaign.	41
No reply	-
Yes	17 41.5%
No	24 58.5%

41. As a result of this awareness, have you now started to consider Italian suppliers of machinery and equipment for your company's needs?

Base: respondents aware of campaign.	41
No reply	1 2.4%
Yes	21 51.2%
No	19 46.3%

Write-in Comments



Write-in answers

1. Which of the following best describes your job title or function?

Other responses:

Aerospace Engineering Manager for R&D
Agent
Business analyst for supply management
Business Analyst Team Leader
Business development – 2 mentions
Business Excellence Leader
Chief Engineer
Chief Estimator, Detailer
Consultant – 5 mentions
Consultant, educator
Continuous Improvement Engineer
Continuous Improvement Leader
Continuous Improvement/ Lean Manager
Design Engineer – 2 mentions
Design/projects engineer
Designer
Director of Lean Development
Director of Quality
Director R & D
Director Supply Chain
Director, global sales and marketing
Director, Materials
Director, Technical Center
Ehs Professional
Ehss Manager/Drafter
Electrical assembly foreman
Emeritus prof.(operations)
Engineer – 12 mentions
Engineering Director
Engineering Manager – 6 mentions
Engineering Supervisor
Engineering Technician
Engineering/Controls Manager
Ergonomist / Human Factors Engineer
Erp Analyst, specializing in Process Management
Estimator
Forecast Manager
Forester

General Manager Finance and Accounting
Health, Safety, Environmental & DOT Compliance
Human Resources Manager
Industrial Engineer
Interviewer
Inventory Control Manager
It Manager
It specialist
Lean & Continuous Improvement Manager
Lean coordinator
Lean Manager
Lean six sigma business improvement partner
Lean Six Sigma Leader
Logistics Analyst
Maintenance manager
Maintenance Planner
Manager printing
Manufacturing Engineer – 8 mentions
Manufacturing Division site learning lead.
Manufacturing Engineer / Environmental Management Systems
Coordinator
Manufacturing Project Engineer
Marketing
Mechanical designer
Middle Management
Order Management, production and scheduling
Owner
Partner
Plant /Facilities Operations Manager
Plant Controller
Plant engineer
Principal Engineer
Principal Mechanical Engineer
Process eng.
Process Engineer
Process Engineering Manager
Process Improvement Manager
Processing Engineering Manager
Product Manager
Product Marketing Manager



Write-in answers

1. Which of the following best describes your job title or function?

Other responses: (...continued)

Product Support / Manufacturing Engineer
Production Engineer
Program manager – 5 mentions
Program Mgr - Engineering
Project Engineer – 2 mentions
Project Manager – 2 mentions
Project Manager/Improvement Leader
Qa/QC EH&S manager
Qc Director
Quality
Quality Assurance Coordinator
Quality Assurance Manager
Quality Manager – 3 mentions
Quality, Safety and Environmental Manager
R&D Manager – 2 mentions
Regional manager
Reliability Engineer
Research and Development
Research and Development Engineer
Research, teaching
Safety
Safety Coordinator – 2 mentions
Safety Manager – 2 mentions
Sales & Marketing
Sales Engineer
Sales Manager
Sectional Supervisor
Self Employed
Senior Continuous Improvement Engineer
Senior Engineer
Senior Manager
Senior Operations and Supply Chain Consultant
Senior Project Engineer
Senior project/integration engineer
Shop supervisor
Site Consultant
Supplier Development Manager
Sustainability manager

Systems engineer
Technical
Technical Support
Test Engineer
Tooling manager
Trainer & Consultant

4. Please provide a brief summary of your current products.

3 axis & 6 axis robots

3pl

70% of the components use by airplane manufacturers to build airplanes.

Such as engines, flight controls and wheels and brakes.

Academy, no material product

Activated Carbon at this location. Carbon Black at other locations

Aerospace

Aerospace components

Agricultural equipment

Aircraft engine overhaul, balance machines, precision grinders, rivet machines, etc.

Alcoholic Beverages

All custom rubber products, molded and extruded. wheel chocks, bumpers, railroad sweeper elements, gaskets, grommets, pipe ramps, cv seals and much more.

All kind of electronics stuff

All types of aluminum semi fabricated frp & extrusion product

All types of machining and babbitted bearings.

All Universities` diplomas bachelor, master doctorate etc

Aluminum Extrusions.

Aluminum sand castings

Anti-friction bearings

Appliances - ranges, dishwashers, etc.

Architectural Coatings - paint, primer, stains

As an analyst, I review current articles, and, therefore, at times, review products, and, also, production, at specific sites, configuring how production at specific sites, locations, plants, could be increased.

Auto

Auto interior parts

Animal Feed Premixes

Automation controls, aerospace equipment, specialty materials and technology, automotive.



Write-in answers

4. Please provide a brief summary of your current products.

(...continued)

An independent consultancy practice supporting diverse manufacturing clients throughout the United States. Offers counsel and guidance related to process improvement and manufacturing efficiency to key stakeholders and clients. ✓ Rendered sound Lean 6-Sigma solutions and other robust resolutions for submittal of questions from the Society of Manufacturing Engineers (SME), Manufacturing Executive, Lean Acres, the PEX Network & IQPC groups within linkedin. ✓ Attend on-line webinars congruent to my expertise and experience for professional development curriculum to bridge potential skill gaps and improve performance, stay abreast of new developments in the industry. ✓ Post vigorous machining / material solutions for the submittal of questions from the Cutting Tools and Machine Groups within LinkedIn.

Automotive / Marine / Heavy Equipment Engine Control Systems & Displays. Also various electrical / electronic systems.

Automotive components.

Automotive control electronics, wiring harnesses, & electromechanical solenoid valves.

Automotive Electronics

Automotive filters

Automotive parts – 2 mentions

Aviation Oxygen Systems

Avionics

Batteries - Aviation, Rail, and standby power

Battery Separator

Bay Industries has over 60 companies in the building and construction market.

Bearings

Bioproducts

Building materials

Cabinet & closet hardware

Can closing machinery

Coating of electronics and medical devices

Ceramic Tile

Cheese making equipment. Whey handling equipment. Controls for this equipment

Chemicals used in metal finishing, electronics, microelectronics and solar cells.

Cleaning Machines

Commercial and Industrial burners

Commercial lawn mowers

Compressor, Turbines

Computer controlled production products, user interfaces for process controls, computer systems, and specialty input devices.

Confectionary products

Confidential

Construction attachments

Construction services

Construction, heavy utility improvements

Consulting Engineering, Process & Manufacturing Design

Consulting for print, paper, pre media, and marketing

Consulting Services

Consultant to manufacturing industries

Contract machine shop

Contract Manufacture for the Electronics Industry

Contract manufacture of shafts, rods, pins & other round, precision components

Contract manufacturer of machined parts and fabrications

Contract manufacturing - cable harness

Converting machinery

Corrugated containers used for a variety of uses

Cosmetic products used in Salons.

Costing software for the manufacturing costing area.

Custody transfer flow meters and accessories

Custom composites

Custom feed for nickel, copper, and other metals for smelters.

Custom Steel Fabrications.

Custom system design & integration.

Custom automation equipment

Data Storage

Defense, communications, early responder equipment, RF components and assemblies

Design and automation machines, tooling

Design projects include automotive quality control equipment, patient transfer devices, exercise related accessories, security items "furniture".

Detergents, pads, baby wipes, facial tissue, washing powder, bar soaps, pampers

Disc brakes for many different types of vehicles and bicycle components



Write-in answers

4. Please provide a brief summary of your current products.

(...continued)

Ditch Witch trenchers, plows, directional drills, vacs
Diversified manufacturing group, from automotive parts to heavy equipment
Economic development organization
Electric motors
Electricity
Electronics equipment
Electronics Inductors
Emulsion polymers, specialty chemicals, laminates, decorative fabrics.
Energy Management Systems Large Scale Solar installations Electric Vehicle Charging Stations
Energy management systems, power distribution systems, residential, industrial, commercial. Automation systems, etc
Engines and transmissions
Equipment shelters and cell phone towers
Fabricated heavy equipment for the environmental industry.
Fabricated products
Fabrication of HVAC equipment.
Fabrication of thermoplastic trims
Face bricks and clay pavers
Fan duty electric motors-appliance industry
Feed and feed products,
Ferro alloys
Field Service and support & Machine repair.
File folders
Financial Institution Documents and Printed Materials
Flexible packaging (food, medical, personal hygiene)
Floor drains, dairy equipment
Foam products including packaging, furniture and boating industries
Food processing equipment
Foodservice equipment for the fast food and dining industries
Forestry lawn garden
Forestry staff uses forestry tools. Lumber supply store has a large selection of industry tools they use to help customers get products suited to their needs.
Furniture
Fuser rollers for copy machines.
Galvanized & aluminized sheet steel.

Gas turbine metal assemblies
General retail
Gensets
Glass bulbs for lighting products
Glass Container Manufacture
Glass mfg
Grooming for dogs and oral hygiene products for sale.
Hand tools for the construction industry.
Hdvtv receiver / decoder. MPEG analysis.
Health care and financial printing
Healthcare
Healthcare product
Heat and Cooling Equipment
Heat Recovery Steam Generators, Specialty Application Boilers
Heat treatment and brazing
Heavy equipment- loader vehicles
Hi-rel coax switches
Humidity Controls units for piano
Hvac fans
Hvac units, transport refrigeration units, golf carts, residential door locks, air compressors.
Hydraulic cartridge valves and manifold systems.
Hydraulic components for the aircraft industry
Hydraulic Conveyors
Hydraulic, Rotary and Specialist Seals
Hydraulics & Hydraulic Systems for Caterpillar vehicles
Hydrostatic pumps and motors, electronic controls, joysticks, displays, valves, steering units, etc.
I provide consultancy for lean six sigma projects.
I train & provide consultancy in lean Journey
Ice Cream and Novelties
Induction heating equipment for heat treating, forging and shrink fit
Industrial adhesive, sealants, coatings.
Industrial and commercial cleaning equipment, manufacturing on 3 continents
Industrial Controls
Industrial controls, sensors, heaters and control panels
Industrial Electrical Control.
Industrial Gases and equipment solutions
Industrial power electronics



Write-in answers

4. Please provide a brief summary of your current products.

(...continued)

Industrial signage and service
Industrial trucks
Ingredients for food and beverage
Injection molded Aerospace and Automotive parts.
Instrument cluster for New Automotive Manufacturers
Interconnect solutions
Investment & business advisory services
Ivd
Job shop
Laminated flexible films
Large Agricultural products
Large format graphic films
Large gas and diesel engines
Large steel fabrication and machined products for gas & oil, transportation and material handling, and defense.
Lean methods and integration training and consulting
Leas acid battery.
Log skidders and tree harvesters
Lubricants & automotive chemicals
Machine company
Machine cutting tools and carbide inserts
Machinery
Management consulting firm specializing in Human Resource Management.
Manufacture Abrasive Blasting Equipment
Manufacture cold finished steel bars
Manufacture Cranes, Rough Terrain, Hydraulic Truck and Boom Trucks.
Manufacture of air filters
Manufacture of Hydraulic Pumps and motors
Manufactured complex fasteners
Manufacturer of Computer Servers, Notebook, ISP Provider, Software Developer and Networking Products
Manufacturer of food products sold in Company stores.
Manufacturer of heavy duty trucks
Manufacturer of vinyl window & door for residential and commercial
Manufacturer, supplier and distribution of Plastic compounds. Provider of materials, services and technologies, delivering specialized, value-creating solutions and building long-term partnerships with customers.

Manufacturers of special purpose machines, jigs and fixtures, press tools, test rigs, and all kinds of fabrication
Manufacturing Switching Power supply, Battery chargers for Boats, Telecommunication Equipments, Transformers
Many different machinery build jobs
Mechanical Machine Design from concept to detail drawings. Mostly in automatic assembly
Medical device (Single use)
Medical devices – 2 mentions
Medical devices for the gastrointestinal field
Medical film printers
Medical injection molded products
Medical material
Medical products
Medical robotics
Merchant bar products
Metal fabrication job shop doing custom product for various companies in the healthcare industry.
Metal Stamping/Forming Press Components
Metallic deposition
Metallurgical product
Mid to high end, build to order, seating products for use in the Hospitality and Entertainment (Gaming/Casino) industries.
Military Defense Products
Military/Aerospace OEM
Military/commercial goods/ cnc/swiss machining
Mill manufacturer of nickel and titanium metals.
Mineral concentrating equipment for the mining industry
Mining and Construction Equipment used in residential, road, and mining
Molded tools to clean floors, walls and aircraft
Molding parts, medical device
N/a
New product design.
Nickel base brazing and hardsurfacing alloys
Non-dairy products: ice cream, beverages, yogurts
Non-destructive testing materials
Ocean Transportation - Containerized Shipping Services
Oem - Agricultural, construction and Trucks manufacturer
Oem – children’s furniture
Off highway construction and mining machinery



Write-in answers

4. Please provide a brief summary of your current products.

(...continued)

Operations and Supply Chain systems implementations (Lean, TMS, WMS, etc)
Operations Sustainability Manager
Our company is engaged in printing such as invitations, banners, sofenir and others - others. besides we also accept bookings and servicing laptops, computers and printers.
Outdoor power equipment
P.U. flexible foam mattresses, sheeting, pillows, quilts etc
Packaging Products
Paint
Pharmaceutical manufacturing. Vaccines, sterile antibiotics, bulk intermediate products.
Pharmaceutical vaccines
Plastic resins, Ag products, Ion exchange beads
Plastic thin wall containers and pails.
Plastics components for automotive industry, molding, compression, SMC and injections.
Plm and 3D Software for product development and factory automation
Pneumatic rotary knife holder tooling and web converting accessory sales.
Portable lift equipment, cranes fabricated from steel and aluminum, capacities to 15 tons
Powder and liquid beverages
Power hand tools and saw blades
Precision cutting tools
Precision machined mechanical components
Premium commercial aircraft seating
Pressure gauges, sensors, transducers, switches, seals etc.
Primary metals
Printed and bound hard and soft cover books
Printed and promotional products
Printed books, magazines, and other matter
Printed Circuit Boards
Printing – 2 mentions
Producer of non-woven nylon fabric used in primarily in medical & industrial filtration applications.
Product selection, development, sourcing, specification, packaging, sales & merchandising services offered to consumer packaged goods suppliers.
Radioactive Sources used with PET Scanners

Restaurant Cooking Equipment
Ride manufacturers in the region of leisure simulation. Hydraulic base for simulators and integration with soft ware
Riding Lawnmower
Robotic machining centers; automation of eddy current inspection; automated mould/pattern making process
Rubber/ Plastic components
Safety & security equip.
Security products
Self Unloading Trailers, grain boxes, manure tankers & spreaders, crude oil tanks, sand tanks, water tanks, frac tanks
Semiconductor manufacturing
Semiconductors, Industrial Ethernet modules and software
Sheet metal stamping dies and general machined parts
Shelters
Silicas
Site selection and project management services.
Skid steer loaders for construction and agriculture
Soft drink bottling.
Software services and software products
Software --tivoli, websphere.. too many to mention. Hardware --Large and mid machine.
Spacecraft
Special machinery, conveyor systems, labeling systems, System Integration
Specialty chemical products for automotive, electrical, and industrial markets.
Specialty Chemicals
Specialty Materials
Specialty Polymers
Specialty protective coatings, greases, adhesives
Spray polyurethane automotive parts
Steel castings
Steel castings and machining
Steel wheels for Automotive like car, truck, tractor and earth moving equipments
Surface Drilling Equipments
Swiss type screw machine products, precision turned parts.
Technical documentation and lineart editing.
Technical foam
Tires



Write-in answers

4. Please provide a brief summary of your current products.

(...continued)

Tissue, Pulp, and Paperboard

Titanium Mill Products, Titanium Aerospace and Medical Products

Tool and die design and manufacturing as well as fabricated sheet metal parts

Torque Arms and custom material handling equipment

Transmission and distribution of electricity

Truck Equipment, final stage manufacture, intermediate manf.

UL approved Industrial control panels, manufacture burners and boiler components

Upholstered Residential Furniture

Vehicle Instrument Clusters and Head-Up Display(HUD)and Relays

Water and Waste Water Treatment mechanisms.

We are a Control Systems Integration company. Automation engineering, data collection, and all aspects of manufacturing plant floor automaton and automation engineering for OEM's. Data collection for manufacturing and OEMs.

We are a Job Shop and Repair or Replace parts for Major Corporations

We are a trading company, a distributor and buying agent for other companies here in the Philippines. We are distributor of Samsung rotary compressors, Galileo tp Process equipments, Surelion capacitors, etc.

We are an Engineering Education Institution with Public Private Partnership arrangement imparting Education and interacting with Industry

We are an independent software vendor. Our products are Cloud base Supply chain solutions. We enable large manufacturing companies to collaborate with their global supply chains, control production within their factory floor and integrate with their customer by setting up an end to end pull process across their value chain.

We are ITT Exelis or Exelis Inc. (separate company formed by the spin-off of ITT Defense from ITT). We make electronic warfare systems, structures, radios, night vision systems, armor, etc. etc. etc. Primarily for the US military.

We currently have 4 pick-and-place robots and 2 4 axis robots for heavy handling (50 pound baskets of parts)

We deal in transportation and delivery services. We deliver products to customers and businesses locally and throughout the Midwest. We use dock trucks, small vehicles and some semis for out of state and local delivery.

We design and manufacture HVAC systems for commercial and industrial applications

We distribute molded rubber products, engineered vibration isolators and pneumatic and electric industrial tools that set blind rivets

We do not use automation or robotics we are a motorcoach operation

We have just add automation to a couple of our filling lines

We make many different automotive components. Starters and alternators are made in the plant that I work in.

We manufacture Commercial and Consumer Ice machines.

We manufacture diesel fuel injectors and components.

We produce all kinds of slippers and is at all sizes and type

We produce mining and construction machinery.

We produce residential HVAC equipment.

We provide industrial hygiene and occupational safety support.

We provide Lean Manufacturing Consulting services

Welding equipment, consumables, accessories

Wind turbines generators and related equipment and services

Woven, knitted, coated, and laminated industrial textiles (e.g. coated fabric for airbags)

11b. If you are adding North American capacity, what are the reasons?

Other responses:

Devaluation of dollar makes shipping overseas more affordable than from Asia

Filling capacity, not adding.

Increasing our Value Add to the Customer

Major customer is US Military and they want USA made products

New coating to market.

Seasonal

We are increase production by productivity.

12. Which people (positions) at your firm have input into decisions on buying equipment? Other responses:

All the above.

Analysts.

Clients

Departmental Managers

Ehs

Equipment team - Purchasing, mechanic & production manager with final approval from General mgr/



Write-in answers

12. Which people (positions) at your firm have input into decisions on buying equipment? Other responses: (...continued)

Equipment users
Experienced CNC machinists
Facilities
Finance area
Finance, Procurement
Just myself.
Maintenance manager
Maintenance, Project Manager
Mfg engineers
Operations – 3 mentions
Owner
Plant / Facilities Engineering manager
President / Owner
Product Support / Manufacturing Engineer
Production
Purchasing
Qc Director
Quality Control and Safety Directors
Research and teaching
Safety
Sales
Self employed
We are an industrial distributor. All our customers are manufacturers

13. Who has the final decision-making authority on buying equipment?

Other responses:
Buying inside the lab
Client's
Consulting services only. No manufacturing capability offered.
Customer
Depending on the \$\$ amount, most supervisory levels
Depends on dollar amount
Depends on spend. Smaller purchases by Plant Manager, larger purchases by VP and Engineering
Director
Engineering – 2 mentions
Engineering and purchasing
Executive VP Operations and Sr. VP/CFO

Facilities and Engineering Department
Fleet equipment purchaser
It depends on the cost.
It depends on the cost... level determines signatures required
It's just myself.
Local to our manufacturing facility, and based on amount of \$ spending
Major appropriations are approved at board level, actual equipment selection is engineering responsibility.
Managing director
Once the project is approved, the project team makes the decision on what equipment to buy.
Project Manager
School director
Sr. Director of Operations
The accounting manager
Vice President
Vp of manufacturing

18. In what setting does your company make the majority of its purchasing decisions? Other responses:

A combination of all of these listed (trade show, vendor event, face-to-face).
This is typically a long process.
All of these settings are important and play a role in determining who we use.
All the above
By determination of our operations/maintenance depts.
Capital committee
Client makes all the decisions
Combination of all of the above.
Combination of both over the phone and Face to Face with salesperson
Direct evaluation of equipment on site or at suppliers facility
Don't know, I'm not involved. Procurement is.
F2f with sales people and intranet research
Face to face with manufacturer
Face-to-face with management (who has the ultimate authority to negotiate pricing)
In contact with technical personnel.
In plant or office meetings after meetings with the selected manufacturer of the desired equipment.
Information obtained is reviewed by the owner



Write-in answers

18. In what setting does your company make the majority of its purchasing decisions? Other responses: (...continued)

Most equipment is developed in Japan by parent company
On site visits and equipment trials.
Phone then face to face
Quoting process
Supplier visits and demos
Technical and commercial meetings to define final specifications and purchasing terms.
Unique products require specialized equipment that needs to be developed with the manufacturer
Various
We use hands selection methods to ensure complete compatibility and success of equipment integration
Web, publications, email, postal
Would be a committee

21. From your perspective, what is the biggest benefit from the purchase of new equipment? Other responses:

All the above
Efficiency
I look at all of the above... it's usually a combined benefit.
Less Problems up front
N/A we sell software not hard goods.
Quality and time for obtain results
This can vary based on the application. We target both improved quality, safety, throughput, and reduced downtime for all projects.
Training
Value....a combination of all of the above
Warranty

25a. What is the country of origin for this equipment?

America
Asia
Australia phone, 07713656275
Austria – 2 mentions
Canada – 4 mentions
China – 8 mentions
Confidential
Denmark

Don't know – 11 mentions
France
Germany/US
Germany – 22 mentions
Germany, Taiwan, Brazil
India – 3 mentions
Indian and foreign
Iran
Italy – 9 mentions
Japan – 30 mentions
Japan/Germany
Korea
Korea, United States
Mixed, primarily Europe, Japan and US
Netherlands
Offshore
Spain
Sweden
Switzerland – 4 mentions
Taiwan
Tube Bender
U.K & TAIWAN
U.S.A. – 134 mentions
Unknown
USA & Japan
USA, Japan, and Italy
Various – 2 mentions
Various, some pieces are from Italy, Netherlands, Germany, and US
Was not involved in the purchase of the equipment

25b. What brand is that equipment?

280" WIWK from Karl Meyer
4Rams
Abb – 2 mentions
Abb Robots
Abbott AND SIEMENS
Accurpress
Akai
Allen/bradley
Allen-Bradley



Write-in answers

25b. What brand is that equipment? (...continued)

Alo
Amada
Amicon
Apple
Arburg – 2 mentions
Autodesk
Battery Cable
Baumer
Bekum
Bostitch
Buhler
Built internally at parent Company
Cameron Compressor
Can not disclose
Cannon Wiking U.K , Sunkist Chemical Company ,Taiwan
Cat – 2 mentions
Caterpillar
Cemt
Cincinnati – 2 mentions
Cmi Efco
Computer
Confidential
Csz
Custom made
Danielli
Data I/O
Deere
Dell
Despatch
Deutsche Machine Fabric
Di-Acro
Different ones
Do not know – 11 mentions
Don't craftsman
Durr
E.a.p..
Eastman
Electrocraft
Esab
Fanuc – 6 mentions
Federal
Feige
Ferry Industries, Inc.
Ficep
Fischer
Fuji – 2 mentions
Ge
Genesis
Goss
Gruber
Guhring
Haas – 6 mentions
Hartness - Verteque
Heller, John Ford, IMF
Hewlett- Packard
Hindustan Machine tools
HP – 3 mentions
Husky
Hyster
Ibm
Id Systems
Illig
Ima
In house made
Indev
Industrial furnace Co.
Ipsen
Jc Steele
Jet
John Deere
John Ford
Juki – 2 mentions
King
Koch
Kodak
Komatsu
Krauss Maffei
Kuka robot
Lathe

Write-in answers

25b. What brand is that equipment? (...continued)

Lectra

Lenovo

Lightening

Machine Center

Mazak – 4 mentions

Mci motorcoach industries

Mercury

Metso

Miller – 2 mentions

Mitsubishi

Mitsui Seiki, Okuma

Moggy

Mori

Mori Seiki – 4 mentions

Mydata

N/A – 5 mentions

N/A System Integration

Nazak

Nematron

Niro

Nissei

Nordson

Nordson /Wmaco

Not certain

Not sure – 5 mentions

Oem

Oil Squeezee Line

Oku

Okuma

Onix

Parpas

Pem

Pemtron, Virtonics

Pines

Preco

Private label

Rolair

Ross

Sacmi

Salvaninie

Schap Specialty Equipment

Schold Mixers

Sealmaker

Secap

Seimens

Short

Sipa

Sodick

Special Order - Design

Stamptec and a custom assembly welder

Star – 4 mentions

Star, Edge (FMB)

Sumitomo

Sunen

Supreme

Tailor made by a small manufacturer

Takamaz

Taylor Products

Terex

Thermodyne

This is specialized pharma equipment, tons of brands. It is purchased and assembeled into skids.

Tornos

Trade secret

Transmission equipment

Truck

Trumpf – 2 mentions

Tsugami

Tykma

Union

Unknown – 3 mentions

Varies depending if it is molding equipment, robots, motors, control circuits, ets

Various – 3 mentions

Verde

Vizient, MAG

Volpak

We have used multiple integrators to design and build various lines.

Weil / Schaal Press



Write-in answers

25b. What brand is that equipment? (...continued)

Wepeco
Wheelabrator
Wickert
Windamatic
Wohler
Won't divulge
Worcester
Xerox – 4 mentions
Yale

26. Which major trade shows and events are you going to this year?

Aacc
Ahr
Ahr Expo FABTECH
All Industrial machinery show
All those regarding manufacturing, mostly in Toronto.
Any
Asis
Asm, FIA, Gear, OTC Pipe
Asme Winter Congress in Houston
Assembly and automation expo Chicago
Australia
Automate Vision Show
Bakery Expo.
Bauma China
Beverageaire
Big Sale
Cantor trade fair ... canton .. Guanzhou
Castexpo
Casting. Machining.
Cebit
Ces, National Hardware Show.
Considering CES if not too busy.
Consumer Electronics show
Dayton AMTS
Design And Manufacturing Midwest
Dist Expo Chi
Do not know – 5 mentions
Eastec

Electronics show in Vegas. IT conference in Chicago. PMI meetings in WI
Expo West
Fabco
Fabtech – 4 mentions
Fabtech cmts
Fabtech, Assembly show, Wire Processing Expo
Fbbtech, ESSEN, ConAgExpo
Graph Expo – 3 mentions
Hanover Tradeshow, INCOSE in Phila, Pa
Have been to the door shown
I will send representatives, but I probably will not go myself.
Ibm
Ice in Orlando, Fl
Iee
Ifma & USGBC, as I am the Sustainability manager not directly involved
with specific equipment purchases. A contributing expert concerned with
Utility consumption and energy efficiency features of equipment &
ancillary support systems
Ilbf EBLC
Imca, Chicago
Imts – 15 mentions
Imts Fabtech
Imts & Fabtech
Imts, Fabtech
Informex, chem show, HBA
Isc West - ASIS - ISC East - CEDIA
Iss
Issa
Itsec
Iwf (atlanta) IMTS, FABTech, and others
Iwf SPESA
Lean systems
Local tradeshow only
Machine manufacturer's trade show @ L.A. convention center
Many
Md&M
Mdm – 3 mentions
Mine Expo
Mining Show in Las Vegas
Most of trade fairs in India



Write-in answers

26. Which major trade shows and events are you going to this year?

(...continued)

N/A – 9 mentions
Networking tradeshow
None – 86 mentions
None due to travel restrictions
None scheduled
Not Decided
Not decided for the year 2013.
Not me
Not sure – 5 mentions
Not yet
Npe and pack show.
Npe, and others that I do not know
Npe, Packaging,
Ntea,SEMA, Logging Congrss < Manf.Expo
Ntma
Pack Expo – 3 mentions
Packaging Show
Polycon
Powder Handling
Power Gen, RICA, Breakbulk
Ppc
Ppc, NACD
Print show
Promat
Pump & Turbo Houston
Quality expo and home show in jan. (vegas)
Representatives attend many trade shows and events throughout the year.
Areas of focus are injection molded plastics, ink printing, electronics manufacturing, metal fabrication, molten metal forming, and testing of said processes.
SEMA SHOW NAFEM
Several major industry shows
Sps IPC Drives
Supply Chain Manager is going to Fabtech
Tbd
Techtextil
Tehran trade show
They are all done this year

Trade fair and business conferences
Trade Show, McCormick Place, Chicago, Illinois.
Truck & trailer show in kentuck, ag fair at michigan state university fairgrounds
Unknown. – 5 mentions
Utech
We attended IMTS and BIMU
Westpac
Whma
Wisconsin Motorcoach Assn. Aba American Bus Assoc.
World of Concrete and others

29a. From which Italian companies do you currently use machinery and equipment?

Any in my lab
Baruffaldi
Bdf
Bonfiglioli
Borghi & Tacony
Busellato
Can not disclose
Comau
Costa
Do not know – 3 mentions
Don't remember but for mattress sewing machine
Favretto
Ferrari
Feum
Filtran
Finnpower panel bender
Galileo TP Process Equipment
Georgia, PAMA
Gioria
Hadi
Ida
Idra
Iemca
Ima
Imf
Landis Grinder



Write-in answers

29a. From which Italian companies do you currently use machinery and equipment? (...continued)

Losma
Marangoni
Molteni chemical processing equipment
N/a different dept
Not sure
Parpas
Prima AND LUCAS
Risco
Sacmi, MOSS Y DAL MASCHIO.
Salvagnini – 2 mentions
Salvanini
Savlavinie
Several
Several
So MANY
Spea
Tadano
Trumpf
Various

30a. Do you recall from which Italian companies you previously used machinery and equipment?

Bachi
Berco, Varinelli
Biesse
Borgi
Buffoli
Campagnolo
Cerutti
Daneili
Fadia
Favretto
Feeder for press machines
Fermax?
Georgio machines, bella
I do not recall
I do not recall but it was a plate roll
Isotex

Itilpress
Many years ago Olivetti,
Maragoni
Mazzoni
Monti
Mvm
Nardelli (I think)
No – 20 mentions
Not sure
Oma srl
Pomini
Rivet guns used to be Italian; think they got bought by Alcoa/Marson
Rutil
Salvagnini – 2 mentions
Selenia
Sorin SpA
Tool and Die shops

32. Why did you choose an Italian manufacturer to meet your company's needs? Other responses:

All of the above.
Already the brand widely used in the target market
Can not disclose
Competitive evaluation
Cost
Don't know
Don't know this was a Procurement decision
Don't remember
I was not involved
Low cost
Machine was bought used
Machinery existed before hand
N/A
Price
Provided machine specific for our requirement at attractive price.
Relationship with - Diagnostics
They were bought before I got here, so i don't know
They were simple and efficient and not overly expensive
To check performance as same are in use at our Romania unifoam factory
Two plants in Italy use Italian machinery

Write-in answers

32. Why did you choose an Italian manufacturer to meet your company's needs? Other responses: (...continued)

Was not in a position to know

Worked in the past

33. If your company uses Italian machinery, what are some of the strengths of the Italian-made equipment your company uses? Other responses:

Cannot disclose

Do not have any current Italian machines

Do not know

Do not know, cannot answer

Do not use Italian equipment

Do not, at present, use.

Does Not apply – 2 mentions

Don't know

Don't know because i don't think our company has ever used. if we get one soon, we will try it

Don't know, as not yet used.

Don't use – 6 mentions

Don't use any

Don't use Italian equipment.

Have not used

Have not used any equipment I knew was from Italy previously

Honestly, I wasn't in on the choice, I don't know

I don't believe we use Italian equipment

N/A – 14 mentions

No

No experience

None

Not sure – 2 mentions

Not used – 4 mentions

Price

Quality, supports flexibility and responsiveness, well designed.

Size of that particular piece

Unknown

We do not currently use any Italian machines

We do not have any Italian equipment at this time

We don't use Italian equipment

33b. What are some of the weaknesses, if any, of the Italian-made equipment your company uses?

After sales service and support (limited English speaking tech support at the factory, lots of Holidays when no one is available, time difference makes calling difficult)

Any

Broke down a lot but they get very high usage from us

Can't answer

Company was brought out. Hard to get parts for.

Cost.

Customer support and reliability

Difficult to obtain service & spare parts availability

Do not have any current Italian machines

Do not know, cannot answer

Do not use currently

Do not use Italian equipment

Does Not apply

Don't know – 5 mentions

Dont know as we have not used so far except the motor. we used

Bonfioglioli motor for our kiddy ride. it is good to use. but the life of the motor is not long enough

Don't know not use one yet

Don't use – 4 mentions

Duration - they don't last long

Equipment is usually not delivered on time. Really poor support after the sale. Service and availability of support/spare parts. Really difficult to reach the tech support people. Overall not worth the price

Flexibility for change

Getting it to US. qualification process in Italy.

Hard to get parts.

High price

High price

I do not Know.

I don't know of any.

Lack application versatility other products have

Lead time and delivery on time

Lead time for parts – 3 mentions

Main sewing machine used having down thread with bobbin case , making it slower machine

Metric instead of English parts dimensions



Write-in answers

33b. What are some of the weaknesses, if any, of the Italian-made equipment your company uses? (...continued)

N/A – 23 mentions

No weaknesses

None – 8 mentions

None right now

Not any that I know of

Not easy to use at times.

Not sure – 3 mentions

Not updated

Not used

Not using at the time

Only one supplier

Pain in the butt to maintain and keep running

Parts

Parts and service availability

Parts Availability – 2 mentions

Poor manuals, if any. No spare parts.

Poor quality

Presence in the US

Prints

Proprietary controls not made specifically for our application

Quality, Workmanship, Responsiveness

Reliability

Reputation

Seems to be pretty particular about material flatness, etc.

Service – 3 mentions

Service and customer support being local. Communication through a middle man is an issue.

Service and language is an issue

Service and onshore customer / warranty issues management

Service issues

Shipping and service

Some Italian made equipment promise more than the equipment really makes.

Spare parts – 2 mentions

Spare parts availability is sometimes limited. Language barrier at times is a problem.

Spare Parts, After sales support

Start-up difficulties

Support – 4 mentions

Support - especially in the states

The Giorias are older units... Guaging for these is directly in the load/unload path. Newer units have corrected this issue...

They are just too tough too work with. Never listen to the customer

Time for replacement parts

Too complex; poor support

Too expensive. Parts need to be imported. Longer wait times for getting parts. Parts are expensive and need to be imported.

Transportation COSTS

Undocumented changes

Unknown – 3 mentions

Unknown at this time.

Unreliable.

We do not use Italian made Equipment

34. If yes, what would that be? Other responses:

More rapid time in res

Reduce price

38. How have you been made aware of the Machines Italia campaign?

Other responses:

Email

E-mail survey through Industry Week.

E-mails

Industry magazines

Previous experience

Survey from Italian Trade Commission

