



AttaainCI Update - May 2010

New AttaainCI Industry Research Module

AttaainCI Industry Profiles help sales and marketing teams perform faster and smarter, open doors and close more deals. Profiles are **updated quarterly** by First Research and synthesize hundreds of sources into an easy to read format that can be absorbed quickly to better understand a prospect's or client's business issues.

The new AttaainCI Industries Research module provides two types of regularly updated profiles:

1) Industry Profiles

Comprehensive industry profiles covering over 700 Industry sectors. Updated on a quarterly basis, industry profiles contain critical analysis, statistics and forecasts to help you engage key prospects, coach key clients, and deepen customer relationships.

Chapters include:

- Industry Overview
- Trends & Opportunities
- Business Challenges
- Executive Insight
- Call Preparation Questions
- Quarterly Industry Update
- Industry Indicators
- Industry Forecast
- Financial Information
- Industry News & Website Links
- Glossary Of Industry Acronyms
- Related Industries and Companies

2) State & Province Profiles

State & Province profiles deliver industry and economic insight, employment and real estate trends, and valuable resource links for each of the 50 US States, Washington DC and 10 Canadian Provinces. Profiles are updated at the end of each quarter.

Chapters Include:

- Big Picture
- Employment Data
- Local Real Estate Summary
- Major Industry Update
- Website Resources
- Related Industries

Accessing AttaainCI Industry Research

The AttaainCI Industry Research module can be accessed by clicking on Research → Industries:



As shown below, the Research Industries screen allows you to:

- Browse and select industries by category
- Search for industries by keywords, SIC Codes or NAICS codes
- Select U.S. State profiles
- Select Canadian Province profiles

Research Industries

Industry, State/Province Profiles

First Research[®] Industry Profiles

In-depth industry profiles covering over 700 industry sectors. Updated on a quarterly basis, industry profiles contain critical analysis, statistics and forecasts to help you engage key prospects, coach key clients, and deepen customer relationships.

Browse Profiled Industries (click to expand categories)

→ Construction and Real Estate	→ Retail
→ Finance and Insurance	→ Service
→ Food and Agriculture	→ Technology and Communications
→ Healthcare	→ Transportation, Energy and Storage
→ Manufacturing	→ Wholesale
→ Public Services, Education, Recreation	

Search All Industries

Search For ▼

(quotes may be used for exact keywords match)

First Research[®] State/Province Profiles

State & Province profiles deliver industry and economic insight, employment and real estate trends, and valuable resource links for each of the 50 US States, Washington, DC and 10 Canadian Provinces. Profiles are updated at the end of each quarter.

U.S. State Profiles

Alabama	Louisiana	Ohio
Alaska	Maine	Oklahoma
Arizona	Maryland	Oregon
Arkansas	Massachusetts	Pennsylvania
California	Michigan	Rhode Island
Colorado	Minnesota	South Carolina
Connecticut	Mississippi	South Dakota
Delaware	Missouri	Tennessee
Florida	Montana	Texas
Georgia	Nebraska	Utah
Hawaii	Nevada	Vermont
Idaho	New Hampshire	Virginia
Illinois	New Jersey	Washington
Indiana	New Mexico	Washington, DC
Iowa	New York	West Virginia
Kansas	North Carolina	Wisconsin
Kentucky	North Dakota	Wyoming

Canadian Province Profiles

Alberta	Newfoundland and Labrador	Québec
British Columbia	Nova Scotia	Saskatchewan
Manitoba	Ontario	
New Brunswick	Prince Edward Island	

Browsing and Viewing Industry, State & Province Profiles

To browse industry categories, click the category title to expand the industry list for that category. For example, clicking the “Healthcare” category reveals the industries in that category:


Browse Profiled Industries (click to expand categories)

- **Construction and Real Estate**
- **Finance and Insurance**
- **Food and Agriculture**
- **Healthcare**
- Ambulance Services
- Chiropractor Offices
- Dentists Offices & Clinics
- Drugstores
- Health Fundraising Organizations
- Healthcare Sector
- Home Healthcare Services
- Hospitals
- Kidney Dialysis Centers
- Managed Healthcare
- Medical & Imaging Laboratories
- Medical Equipment Distributors
- Medical Supplies and Devices
- Mental Health and Substance Abuse Services
- Nursing Homes and Assisted Living
- Optometrists and Opticians
- Outpatient Surgical Centers
- Physician Offices
- Rehabilitation Therapy Practices
- **Manufacturing**
- **Public Services, Education, Recreation**
- **Retail**
- **Service**
- **Technology and Communications**
- **Transportation, Energy and Storage**
- **Wholesale**

Clicking on an Industry (or State or Province) opens a new report window with a profile of the selected item.

State and Province reports include all chapters on one screen:

US State Profile


California

Big Picture

- **State job growth** fell 4.6% in January 2010 from a year ago; national job growth fell 3.0%.
- **State unemployment** averaged 13.2% in January 2010; the national average was 9.7%.
- **Personal income** fell 2.7% to \$1.6 trillion in Q3 2009 from a year ago.
- **Tax revenue** fell 9.2% in Q3 2009 from the previous year.
- **Exports** fell 19.9% to \$104 billion in the first ten months of 2009 from a year ago.
- **Venture capital investment** in CA fell 23% to \$2.7 billion in Q3 2009 from a year ago.

Employment Data

Minimum wage of \$8.00 well exceeds the \$7.25 national rate.
California Unemployment and Job Growth Rates
 January 2010

	Unemployment Rate	Job Growth Rate
US	9.7%	-3.0%
Bakersfield	17.1%	-3.9%
Chico	15.1%	-2.8%
El Centro	27.3%	-4.3%
Fresno	18.2%	-4.4%
Hanford	18.2%	1.7%
Los Angeles	12.4%	-4.7%
Madera	16.6%	-0.6%
Merced	21.7%	-4.7%
Modesto	18.9%	-4.1%
Napa	11.1%	-4.6%
Oxnard	11.6%	-4.8%
Redding	17.6%	-2.7%
Riverside	15.0%	-6.3%
Sacramento	13.1%	-4.1%
Salinas	17.8%	-2.5%
San Diego	11.0%	-4.0%
San Francisco	11.1%	-5.3%
San Jose	12.4%	-5.0%
San Luis Obispo	10.6%	-5.2%
Santa Barbara	10.4%	-3.8%
Santa Cruz	15.0%	-3.4%
Santa Rosa	11.3%	-6.1%
Stockton	18.4%	-3.5%
Vallejo	13.0%	-3.4%
Visalia	18.3%	-3.6%
Yuba City	20.8%	-3.1%

California Industry Growth Rates

January 2010

	Job Growth Jan 09 to Jan 10
All Employment	-4.6%
Construction	-17.6%
Manufacturing	-8.6%
Metal Products	-12.2%
Industrial Machinery	-20.0%
Computers & Electronics	-7.8%
Communications Equip.	-4.6%
Semiconductors	-9.2%
Avionics	-7.6%
Aerospace Products	-5.2%

Industry reports show each chapter on a separate screen. Industry Profile chapters may be viewed by clicking on the link for the desired chapter. Using the “Medical Equipment & Supplies” industry profile as an example, clicking on the “Industry Overview” link displays that chapter:

Industry Profile

Medical Equipment & Supplies

Companies that develop, manufacture, and market medical and dental instruments or surgical equipment, including syringes, respiratory care equipment, wheelchairs, X-ray equipment, laser systems, hospital clothes, and related supplies.

Chapters

Industry Overview	Call Preparation Questions	Financial Information
Trends & Opportunities	Quarterly Industry Update	Industry News & Website Links
Business Challenges	Industry Indicators	Glossary Of Industry Acronyms
Executive Insight	Industry Forecast	Related Industries and Companies

Industry Overview

The US medical supplies and devices manufacturing industry includes about 11,000 companies with combined annual revenue of \$75 billion. Major companies include Baxter International, Boston Scientific, Johnson & Johnson, and Medtronic. The industry is highly concentrated: the 50 largest companies account for about 75 percent of revenue.

Medical supply and device manufacturers produce surgical, ophthalmic, and dental instruments and supplies used in the medical field. The industry doesn't include the manufacture of x-ray or electromedical equipment and devices, such as ultrasound equipment, pacemakers, and electrocardiographs.

Average hourly wages for workers in medical products manufacturing are slightly lower than the national average. Because of relatively small production runs, much of the manufacturing is **labor-intensive**, prompting manufacturers to move production to lower-cost countries like Ireland, Mexico, and China. Most medical products manufacturing workers require only average skills.

Injury and illness rates for the industry are about 30 percent lower than the national average. Common injuries include strains, sprains, cuts, and wrist pain from working with machinery, moving containers, and overexertion.

Industry Employment Growth - Bureau of Labor Statistics

Year	Medical equipment & supplies (%)
2000	1%
2001	0%
2002	-1%
2003	-1%
2004	-1%
2005	1%
2006	1%
2007	1%
2008	1%
2009	-1%
Feb 10	-2%

Average Hourly Earnings & Annual Wage Increase - Bureau of Labor Statistics

Year	Medical equipment & supplies (\$)
2000	\$12.70
2001	\$13.17
2002	\$13.65
2003	\$13.82
2004	\$14.32
2005	\$14.71
2006	\$14.99
2007	\$15.06
2008	\$15.79
2009	\$16.87
Feb 10	\$17.22

Competitive Landscape

Demand is driven by population demographics and advances in medical knowledge and technology. The profitability of individual companies depends on the ability to develop superior products. Large companies have economies of scale in manufacturing and R&D. Small companies can compete successfully by specializing in a particular market segment, or through technical innovation.

Finance & Regulation

Receivables can be high - typically between 30 and 60 days sales - because of manufacturer dependence on large buyers. Small manufacturers funded by venture capital may have large cash balances from periodic rounds of fundraising. The costs and availability of liability insurance are a major concern for companies, especially because manufacturers and distributors are routinely named.

Searching Industries

To search all industries by keyword, NAICS Code, or SIC Code, you may use the “Search All Industries” option. Industries matching a searched term will be displayed below the search box. For example, searching industries for the keyword “HACCP” provides the following list of industries that contain text matching that keyword:

Search All Industries

Search For

(quotes may be used for exact keywords match.)

Industry Search Results

Keyword Search: HACCP

- [Aquaculture](#)
- [Exterminating and Pest Control Services](#)
- [Farm Support Services](#)
- [Fish & Seafood Products](#)
- [Meat Products](#)
- [Poultry Products](#)

Viewing Industry Profiles via Company Details Reports

AttainCI Company Details reports now include links to related Industry profiles. Links to the related industry reports can be found in the “Industry Intelligence” section in the right-hand column of the Company Details report, as shown in the following example for Dell Inc.:

Industry Intelligence

Related Industries:

- [Computer Hardware](#)
- [Computer Networking Equipment](#)
- [Routing & Switching Equipment](#)
- [Computer Peripherals](#)
- [Printing & Imaging Equipment](#)
- [Personal Computers \(primary\)](#)**
- [Servers & Mainframes](#)
- [Supercomputers](#)
- [Workstations & Thin Clients](#)
- [Mass Storage Systems](#)
- [Specialized Computer Systems](#)
- [Point-Of-Sale & Electronic Retail Systems](#)
- [Computer Services](#)
- [Computer Products Distribution & Support](#)
- [Information Technology Services](#)
- [Technology Leasing](#)
- [Telecommunications Equipment](#)
- [Wireless Telecommunications Equipment](#)
- [Wireless Telephone Handsets](#)
