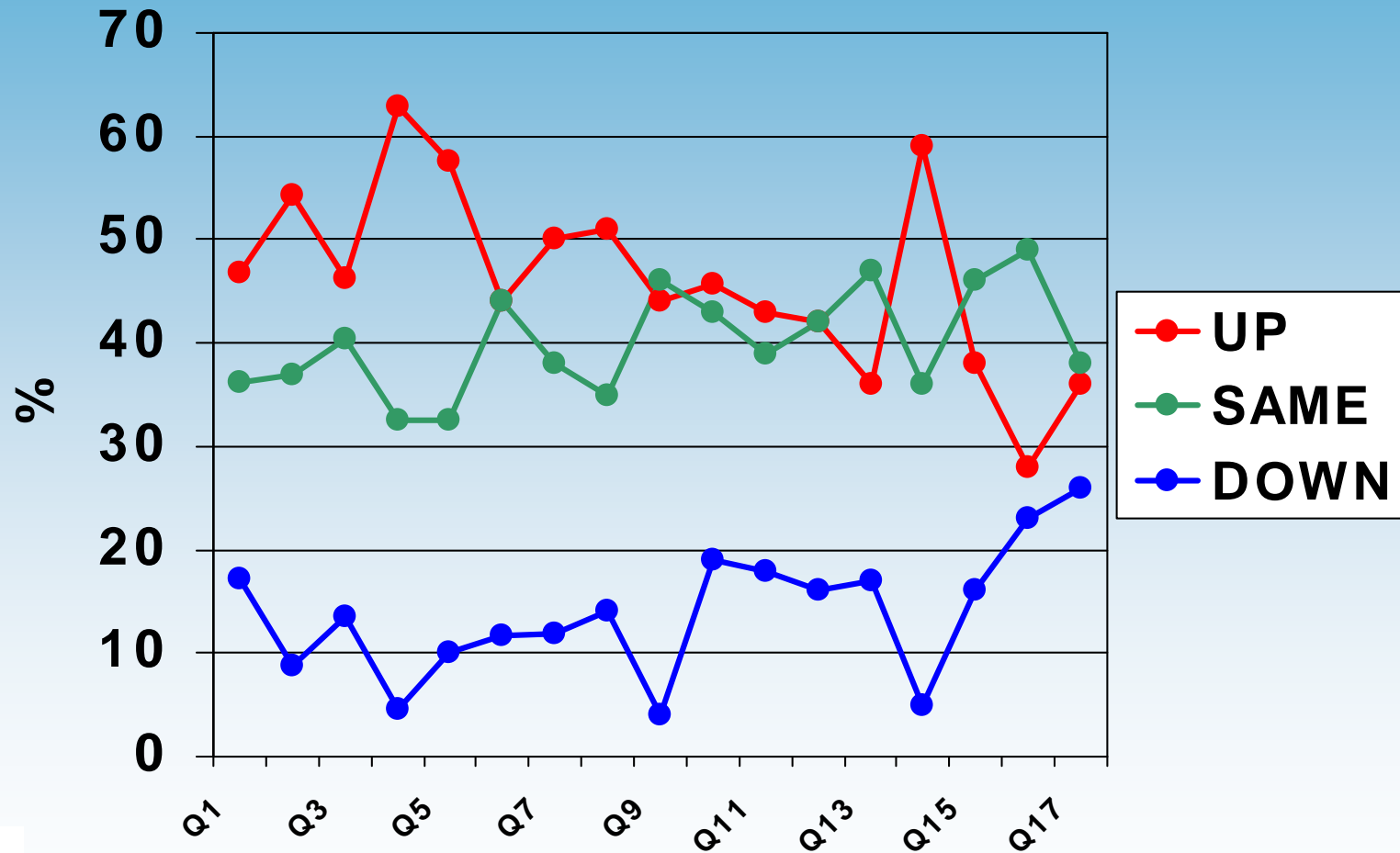


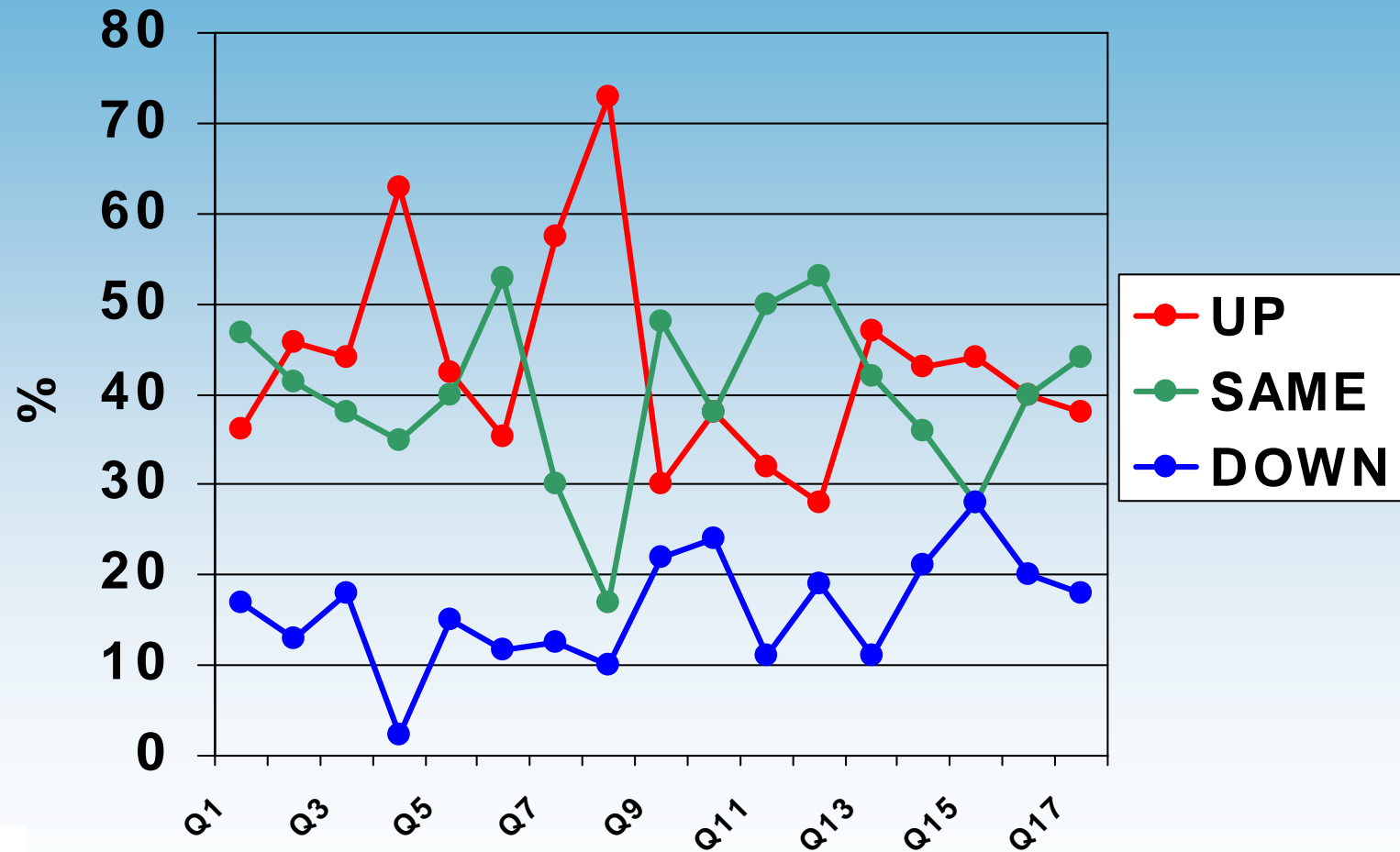
Quarterly Industry Snapshot Survey

- QISS 1 was sent out in June 1999
- QISS 17 was sent out on 1 March 2004
- Average number of replies 42

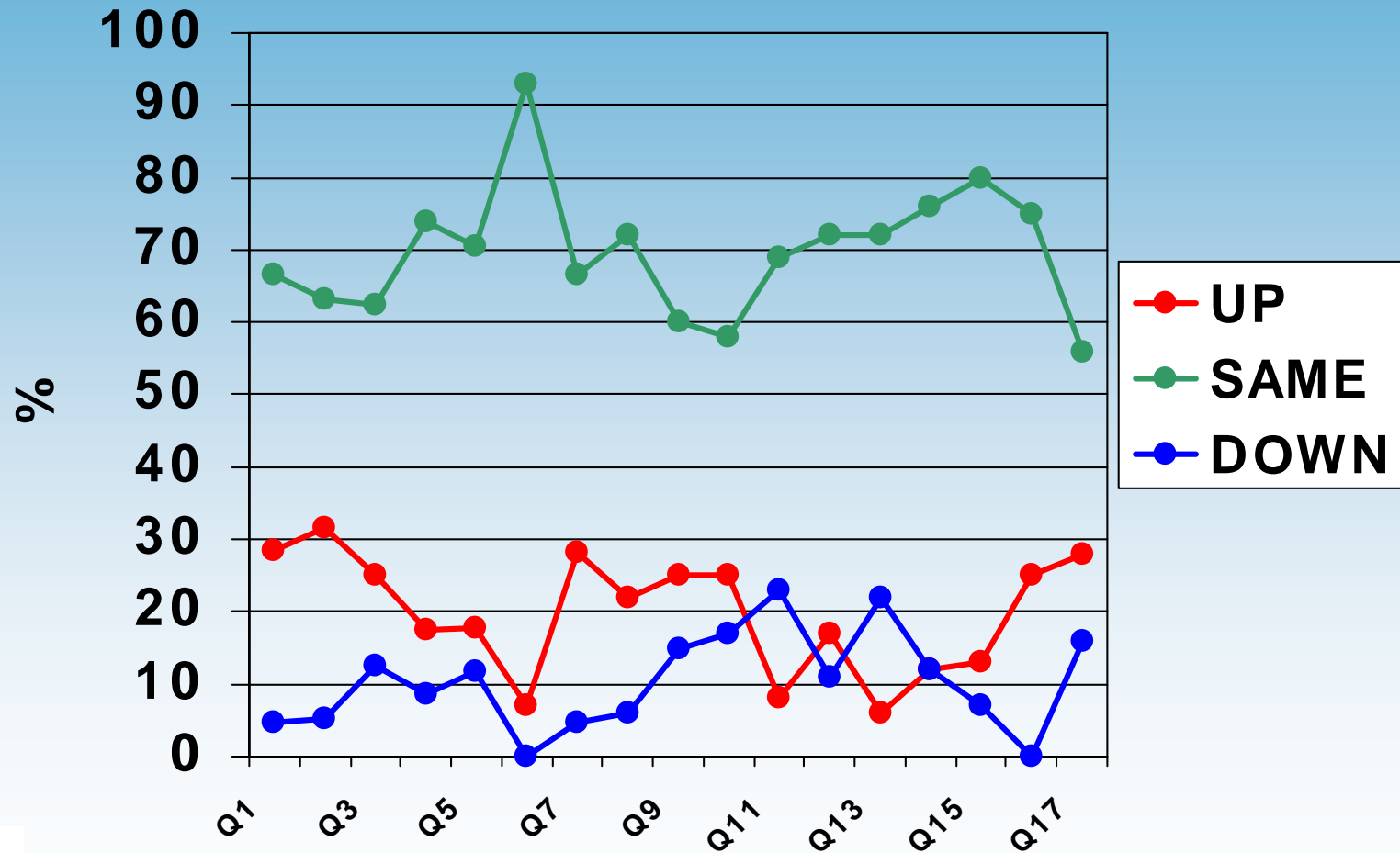
Home Sales



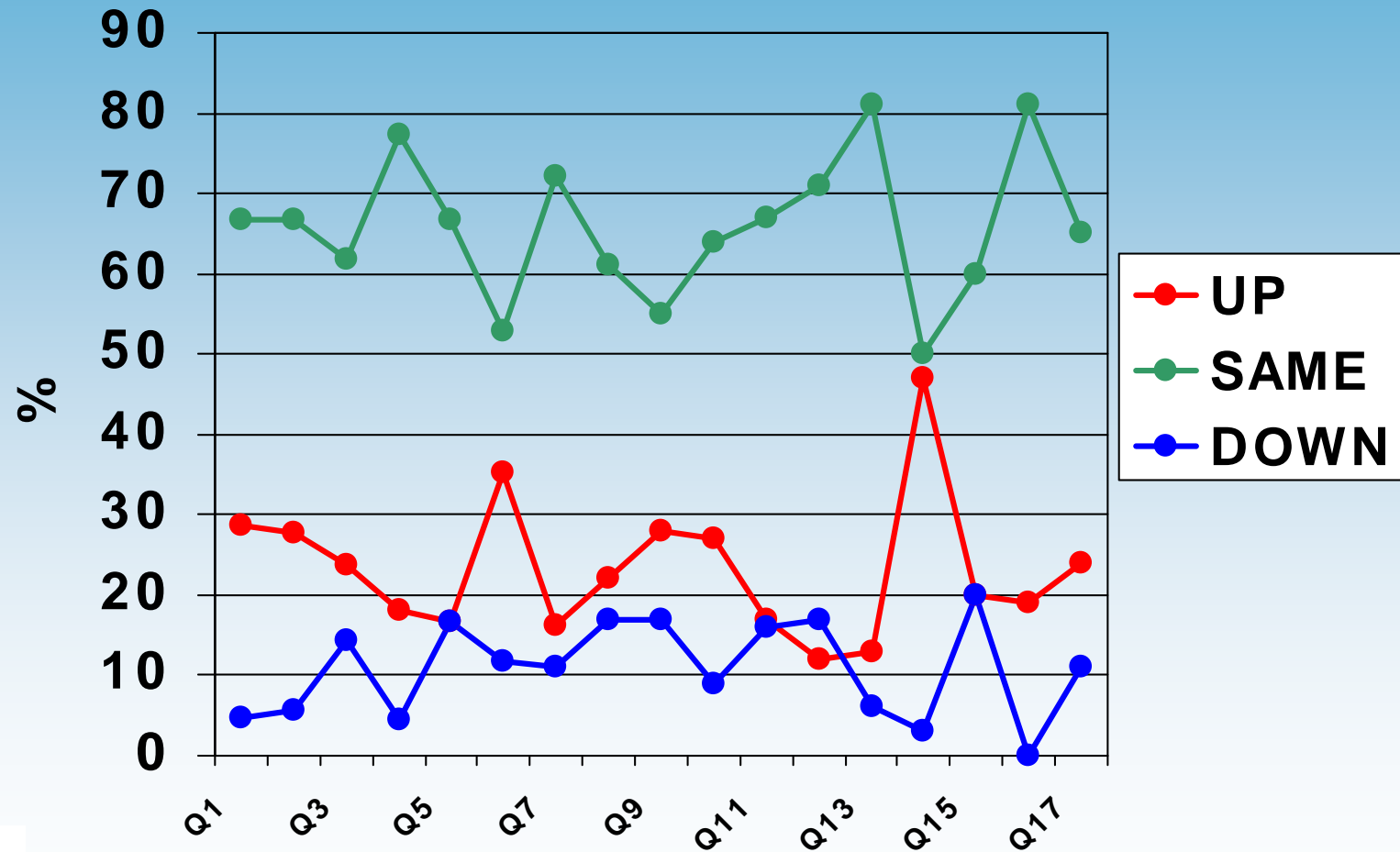
Home Orders



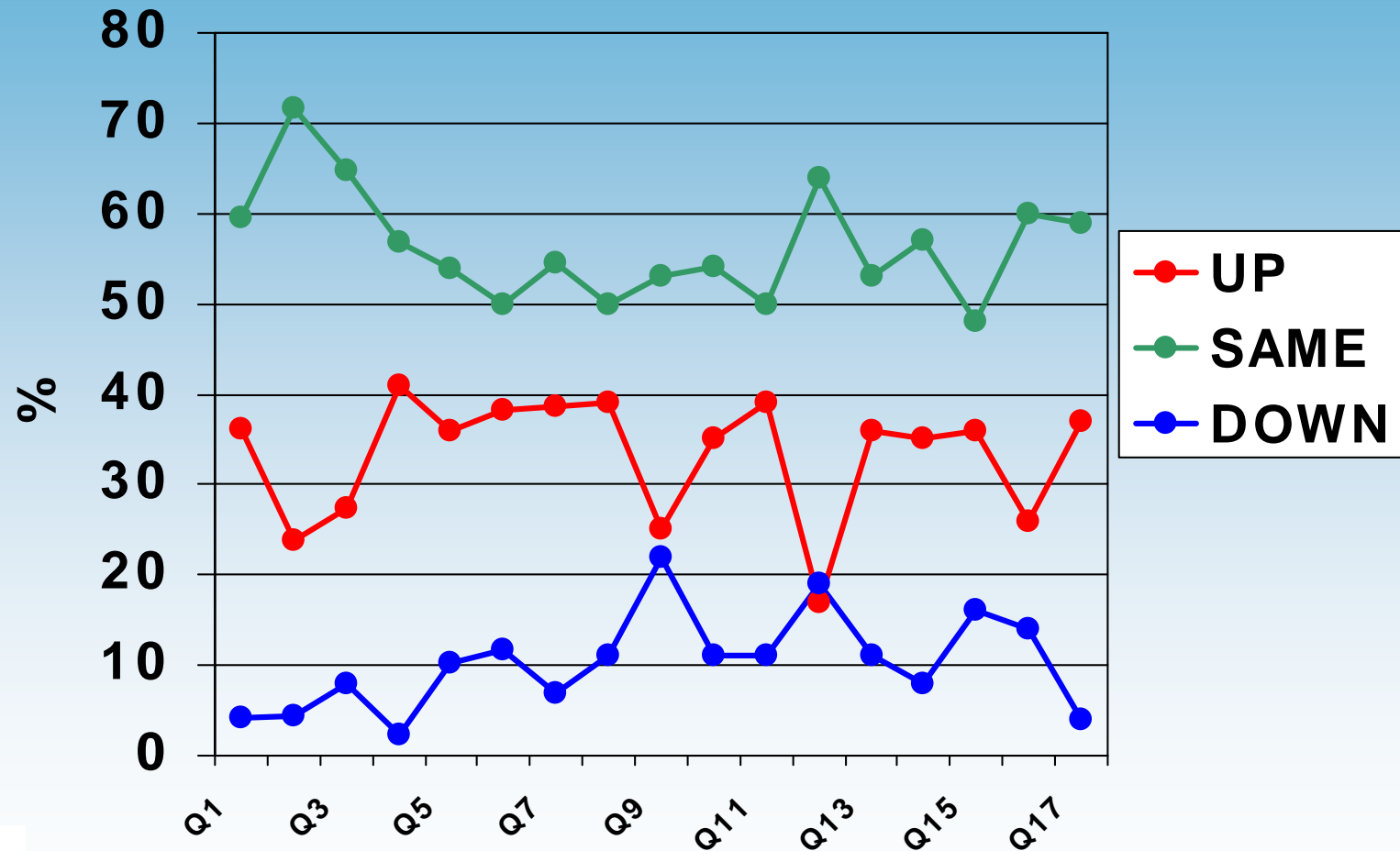
Export Sales



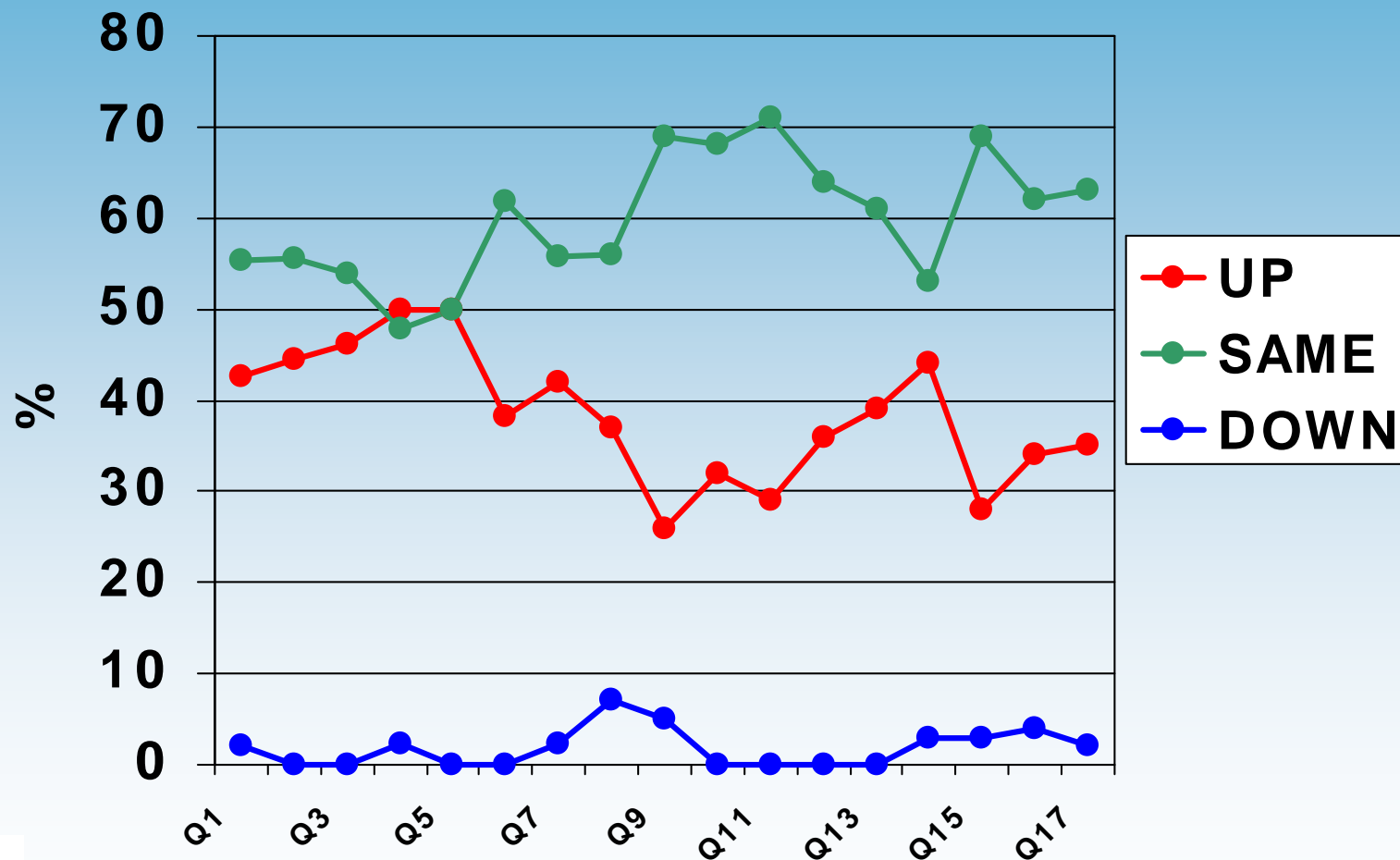
Export Orders/Enquiries



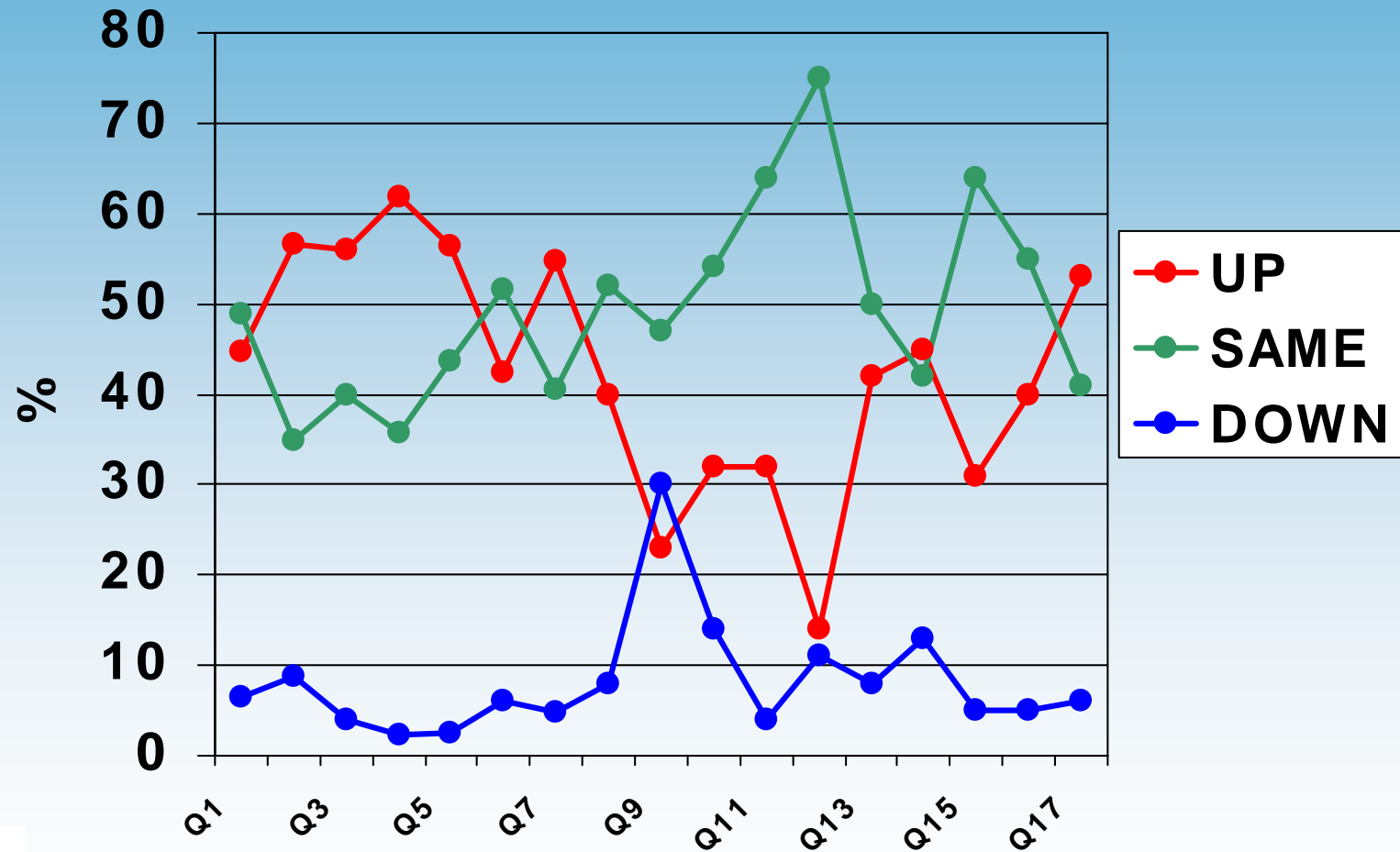
Workforce changes in last 3 months



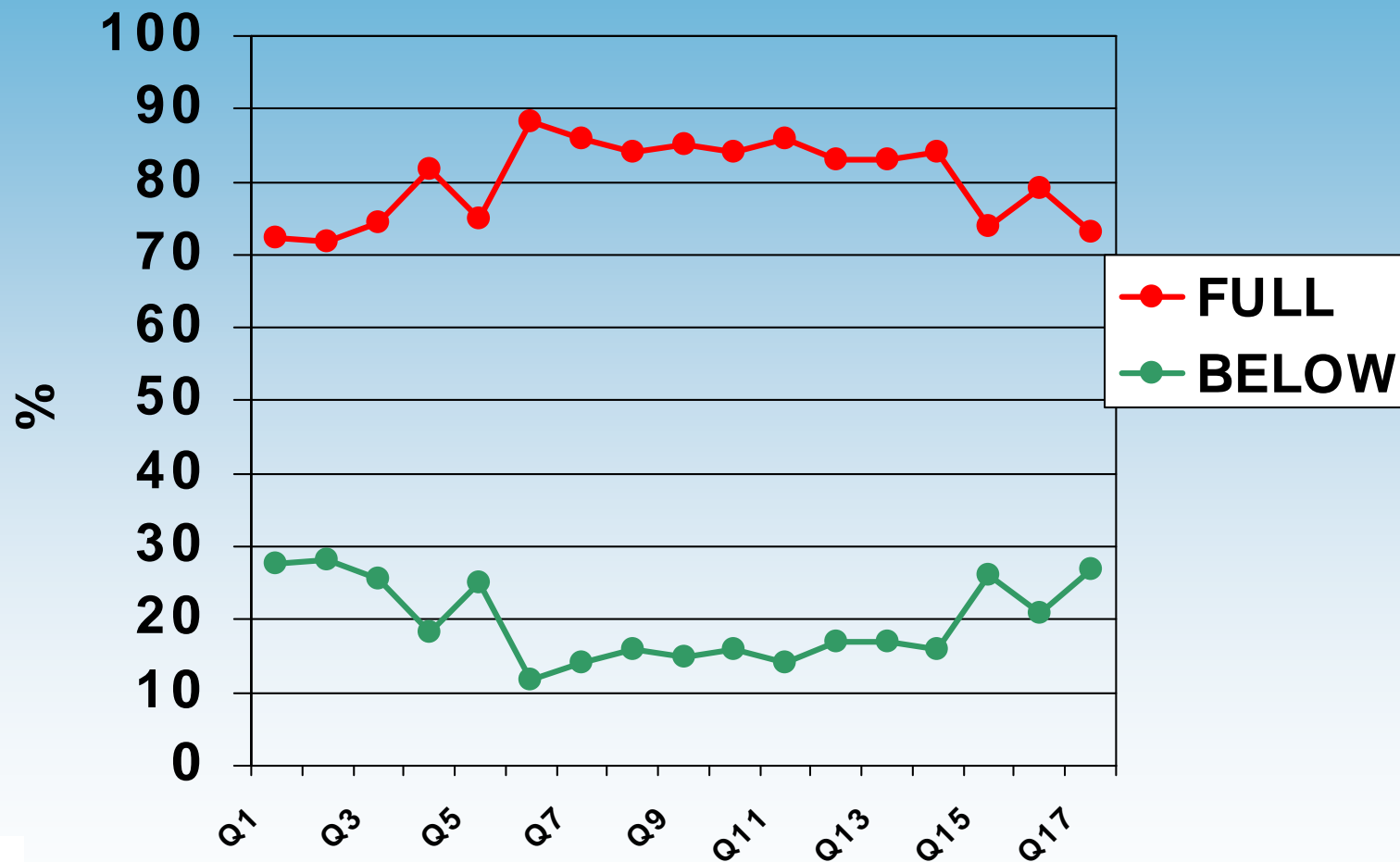
Workforce changes in next 3 months



Sales in next 12 months



Company Capacity



The key constraints – March 2004

1. Shortage of skilled staff
2. Low Fees

(the above items consistently take 50% of member votes between them)

3. Competition
4. Late Payment
5. Delivery of product
6. Shortage of orders