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**National Association of Purchasing Management - Rochester
Business Survey for March 2009**

General Business Conditions improved by two percentage points since last month. Again, the Manufacturing Sector continues to decline and the Non-Manufacturing Sector is showing some signs of improvement – although that is dependent on the type of business.

New Orders / Requests for Services dropped slightly this month – mainly due to Manufacturing.

Commodity Prices continue to stabilize. There were 15% fewer reports of lower prices but the same amount reported higher prices.

Inventory levels were unchanged since the last report.

Employment levels dropped overall. The Manufacturing Sector saw a loss of jobs while Non-Manufacturing remained stable.

Delivery Performance was as promised.

Order Lead Times were reported shorter by 13% of the respondents; 7% reported longer lead times.

One third of the respondents foresee an improved **Three-Month Forecast** but the same amount expect a decrease.

March statistics are enclosed.

Ron Roy, C.P.M.
NAPM-Rochester

Data in this survey is compiled only from individuals and companies who have been screened and authorized by the Business Survey Committee.

**NAPMR Business Survey Report
September 08 through March 2009**

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| | SEP | OCT | NOV | DEC | JAN | FEB | MAR |
|--|-----|-----|-----|-----|-----|-----|-----|
|--|-----|-----|-----|-----|-----|-----|-----|

General Business Conditions:

| | | | | | | | |
|--------|-----|-----|-----|-----|-----|-----|-----|
| Better | 18% | 6% | 5% | 12% | 5% | 11% | 13% |
| Same | 71% | 88% | 58% | 47% | 63% | 47% | 47% |
| Worse | 11% | 6% | 37% | 41% | 32% | 42% | 40% |

New Orders or Services:

| | | | | | | | |
|------|-----|-----|-----|-----|-----|-----|-----|
| More | 17% | 6% | 5% | 12% | 26% | 26% | 20% |
| Same | 59% | 82% | 42% | 53% | 32% | 32% | 33% |
| Less | 24% | 12% | 53% | 35% | 42% | 42% | 47% |

Commodity Prices:

| | | | | | | | |
|--------|-----|-----|-----|-----|-----|-----|-----|
| Lower | 29% | 35% | 32% | 41% | 37% | 42% | 27% |
| Same | 36% | 35% | 53% | 53% | 42% | 37% | 67% |
| Higher | 35% | 30% | 15% | 6% | 21% | 21% | 6% |

Inventories:

| | | | | | | | |
|--------|-----|-----|-----|-----|-----|-----|-----|
| Lower | 12% | 12% | 26% | 24% | 42% | 21% | 20% |
| Same | 82% | 53% | 47% | 65% | 47% | 53% | 53% |
| Higher | 6% | 35% | 27% | 11% | 11% | 26% | 27% |

Employment:

| | | | | | | | |
|------|-----|-----|-----|-----|-----|-----|-----|
| More | 23% | 24% | 16% | 6% | 5% | 21% | 13% |
| Same | 53% | 47% | 42% | 76% | 69% | 42% | 47% |
| Less | 24% | 29% | 42% | 18% | 26% | 37% | 40% |

Delivery Performance:

| | | | | | | | |
|-------------|-----|-----|-----|------|-----|-----|------|
| Early | 0% | 0% | 6% | 0% | 0% | 5% | 0% |
| As Promised | 71% | 71% | 89% | 100% | 95% | 95% | 100% |
| Late | 29% | 29% | 5% | 0% | 5% | 0% | 0% |

Order Lead Times:

| | | | | | | | |
|---------|-----|-----|-----|-----|-----|-----|-----|
| Shorter | 0% | 6% | 26% | 18% | 26% | 11% | 13% |
| Same | 65% | 82% | 63% | 76% | 63% | 89% | 80% |
| Longer | 35% | 12% | 11% | 6% | 11% | 0% | 7% |

Three Month Forecast:

| | | | | | | | |
|----------|-----|-----|-----|-----|-----|-----|-----|
| Increase | 12% | 6% | 16% | 12% | 16% | 42% | 33% |
| Stable | 70% | 76% | 68% | 47% | 47% | 26% | 34% |
| Decrease | 18% | 18% | 16% | 41% | 37% | 32% | 33% |

