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**National Association of Purchasing Management - Rochester
Business Survey for September 2008**

General Business Conditions slipped slightly since the last report, although 71% of the respondents indicated their businesses remained stable.

New Orders / Requests for Services showed a small decline this month – mainly due to Manufacturing. Non-Manufacturing increased a bit.

Are we over the hump? **Commodity Prices** were reported lower by 29% of the respondents – the first such decrease since 2004. A majority of those responses came from the Manufacturing Sector.

Inventory levels were the same for 82% of the respondents.

Employment levels dropped slightly since August – partly due to the end of the period of summer seasonal employees. Nearly a quarter of the respondents reported an increase.

Delivery Performance, although generally on time, edged a bit to the late side.

Order Lead Times were longer this month.

The Non-Manufacturing Sector predicts the **Three-Month Forecast** to be stable. Manufacturing is split depending on the nature of the businesses. Some companies are coming off a strong period and expect to experience a period of market adjustment. Others are entering their busiest time of year. Either way, a healthy 82% expect business to remain steady or improve. Although prices seem to be leveling off, there is still worry about what energy costs will do to the bottom line – both short and long term.

September 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
February 2008 through August 2008**

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	MAR	APR	MAY	JUN	JUL	AUG	SEP
General Business Conditions:							
Better	20%	25%	20%	14%	13%	25%	18%
Same	73%	67%	67%	79%	81%	67%	71%
Worse	7%	8%	13%	7%	6%	8%	11%
New Orders or Services:							
More	33%	25%	47%	21%	6%	33%	17%
Same	54%	67%	40%	72%	81%	50%	59%
Less	13%	8%	13%	7%	13%	17%	24%
Commodity Prices:							
Lower	0%	0%	0%	0%	0%	0%	29%
Same	20%	8%	20%	0%	6%	42%	36%
Higher	80%	92%	80%	100%	94%	58%	35%
Inventories:							
Lower	13%	17%	7%	21%	13%	0%	12%
Same	60%	58%	73%	43%	68%	75%	82%
Higher	27%	25%	20%	36%	19%	25%	6%
Employment:							
More	20%	8%	27%	29%	19%	25%	23%
Same	67%	75%	73%	71%	62%	67%	53%
Less	13%	17%	0%	0%	19%	8%	24%
Delivery Performance:							
Early	0%	0%	0%	0%	0%	8%	0%
As Promised	80%	75%	60%	79%	69%	75%	71%
Late	20%	25%	40%	21%	31%	17%	29%
Order Lead Times:							
Shorter	0%	8%	0%	0%	0%	8%	0%
Same	73%	50%	67%	79%	56%	75%	65%
Longer	27%	42%	33%	21%	44%	17%	35%
Three Month Forecast:							
Increase	33%	25%	27%	21%	13%	17%	12%
Stable	54%	67%	53%	58%	74%	75%	70%
Decrease	13%	8%	20%	21%	13%	8%	18%

