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Gleason Works

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

General Business Conditions were mostly unchanged since last month. New Orders improved for 27% of respondents and remained the same for the other 73%. There were no reports of worse conditions for the second month and no reports of fewer orders for the first time in over a year.

After a one-month respite, Commodity Prices edged up a bit this month, mainly from the Manufacturing Sector. Inventory levels stayed the same for 60% of the respondents and were lower for 40%.

Employment lost some of its impetus from the last two months with 12% more responses of lower employment. Manufacturing was lower; Non-Manufacturing unchanged.

Delivery Performance came in on the late side and Order Lead Times were mainly unchanged.

The Three Month Forecast seems to indicate a mixed feeling about the end of this year and the first quarter of 2010 with 20% of responses predicting a better forecast while 27% expect a decrease. Some companies see a glimmer of hope (increase in demand for products or services, new contracts) entering the new year. Others are coming into a seasonally slow time. Overall, conditions are better than at this time last year.

November 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  
May 2009 through November 2009**

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**MAY JUN JUL AUG SEP OCT NOV**

**General Business Conditions:**

Better	13%	29%	29%	9%	29%	42%	27%
Same	67%	71%	64%	64%	50%	58%	73%
Worse	20%	0%	7%	27%	21%	0%	0%

**New Orders or Services:**

More	33%	57%	29%	18%	43%	59%	27%
Same	47%	36%	64%	46%	36%	33%	73%
Less	20%	7%	7%	36%	21%	8%	0%

**Commodity Prices:**

Lower	7%	14%	21%	9%	7%	17%	13%
Same	80%	79%	64%	36%	50%	75%	60%
Higher	13%	7%	15%	55%	43%	8%	27%

**Inventories:**

Lower	27%	43%	43%	27%	21%	50%	40%
Same	46%	43%	50%	55%	65%	42%	60%
Higher	27%	14%	7%	18%	14%	8%	0%

**Employment:**

More	40%	29%	50%	9%	29%	25%	13%
Same	27%	50%	36%	64%	43%	67%	67%
Less	33%	21%	14%	27%	28%	8%	20%

**Delivery Performance:**

Early	0%	7%	0%	0%	0%	0%	6%
As Promised	93%	79%	93%	100%	64%	83%	67%
Late	7%	14%	7%	0%	36%	17%	27%

**Order Lead Times:**

Shorter	7%	7%	0%	0%	0%	8%	20%
Same	93%	79%	93%	64%	64%	59%	60%
Longer	0%	14%	7%	36%	36%	33%	20%

**Three Month Forecast:**

Increase	27%	29%	36%	18%	36%	33%	20%
Stable	60%	57%	64%	73%	57%	67%	53%
Decrease	13%	14%	0%	9%	7%	0%	27%

