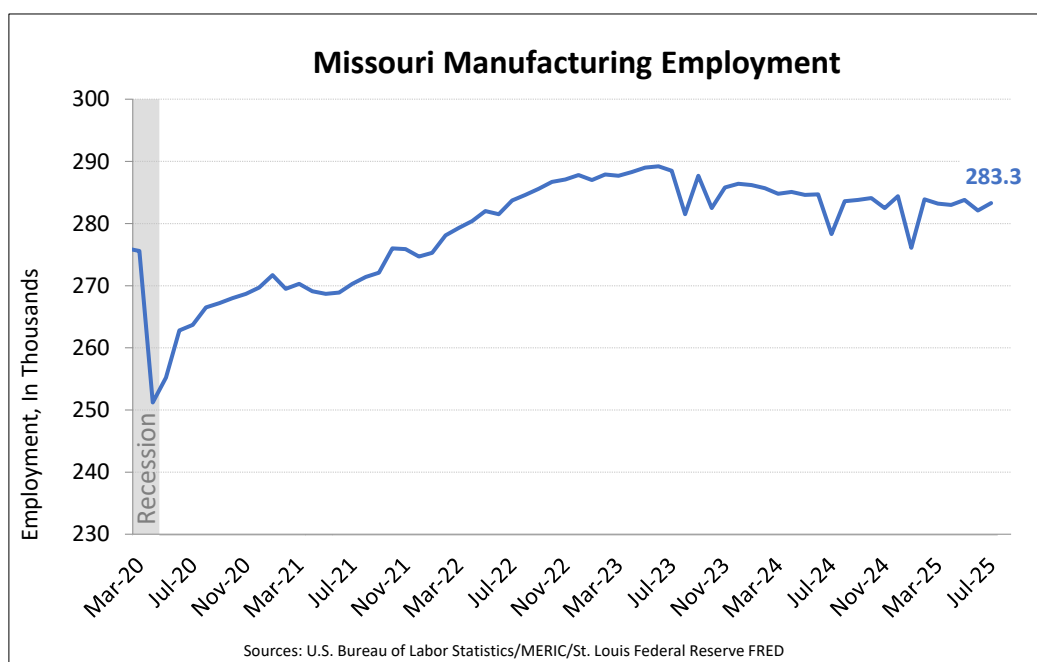


The Missouri Manufacturing Indicators is a monthly brief that uses several surveys to highlight recent manufacturing economic activity. The latest figures for this brief include:

- The Missouri manufacturing sector employed 283,300 people in July 2025. Production employment increased 1.8% over the past 12 months, slightly faster than the 1.7% increase in overall Missouri employment. U.S. manufacturing employment contracted by 0.9% over the year.
- The July 2025 Missouri purchasing management index edged up from the previous month but continues to signal modest expansion (51.8). Readings for new orders were troubling, as the index dropped significantly over the month and may indicate slower sales later this year.
- The Mid-America price index, for Missouri and most surrounding states, indicates that wholesale price inflation continues to climb as the index has increased every month since February 2025.
- Missouri manufacturing hourly earnings advanced by 5.6% from a year earlier, based on a three-month moving average. This growth rate surpassed annual consumer inflation of 2.6%, representing continued gains in real earnings over the year.

## Missouri Manufacturing Employment Increases in July

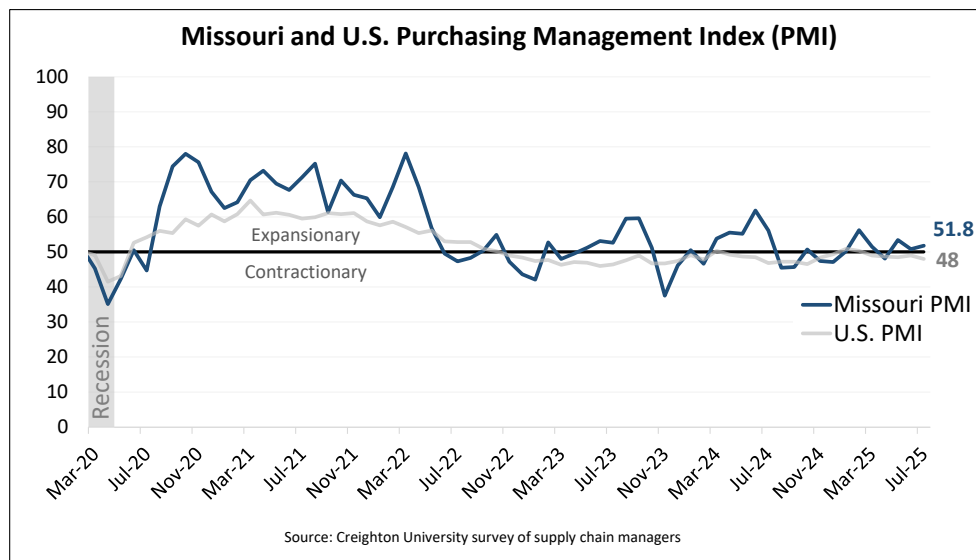
Missouri manufacturers employed 283,300 workers in July 2025, up 1,200 jobs from June, according to preliminary U.S. Bureau of Labor Statistics (BLS) estimates. Over one year, Missouri manufacturing jobs have grown by 5,000, representing a 1.8% increase in production jobs since July 2024 (U.S. -0.9%).



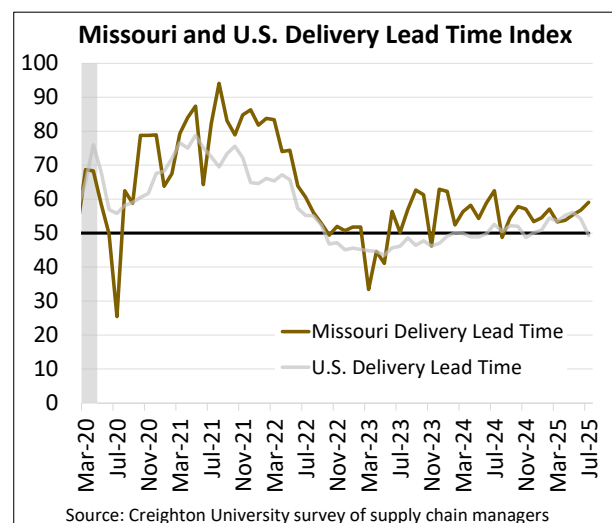
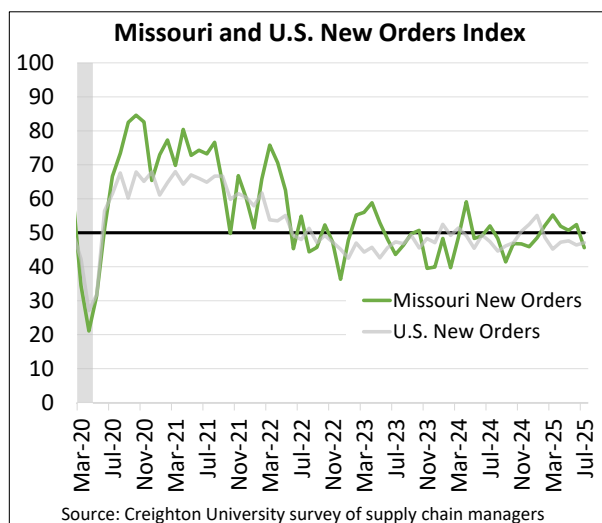
## Missouri Purchasing Management Index Up Marginally in July

Creighton University produces a monthly purchasing management index that averages several indices to track trends such as new orders, production, and inventories. The index ranges between 0 and 100, with values over 50 indicating an expansionary outlook for manufacturing over the next three to six months and values below 50 pointing toward a contractionary period. The index is a leading indicator of manufacturing activity and mirrors the national Institute of Supply Management (ISM) survey methodology.

- In July 2025, Missouri's PMI rose slightly to 51.8, moving further into expansionary territory. By contrast, the U.S. index slipped to 48 and remained in contractionary territory.



- The Missouri new orders index was 45.6 in July, down substantially from the previous month. The Missouri index moved below the U.S. level (47.1) into contractionary territory for the first time since January 2025.
- Elevated Missouri supplier delivery lead times – a significant issue in prior years – have begun to climb again. The July index for Missouri (59.1) represents four months of lead time increases.



## Mid-America Manufacturers See Wholesale Prices Continue to Climb in July

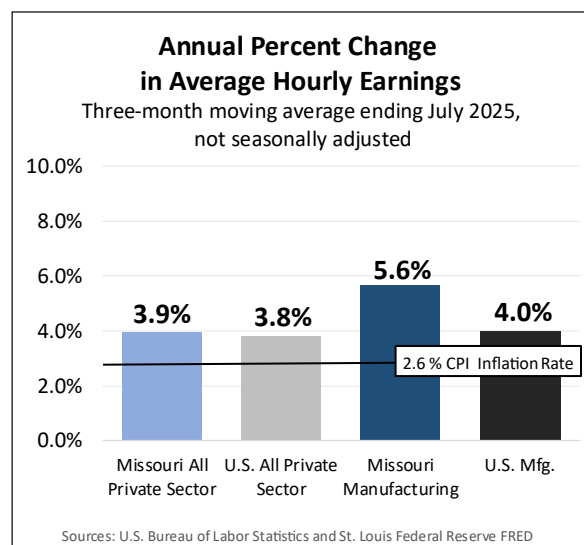
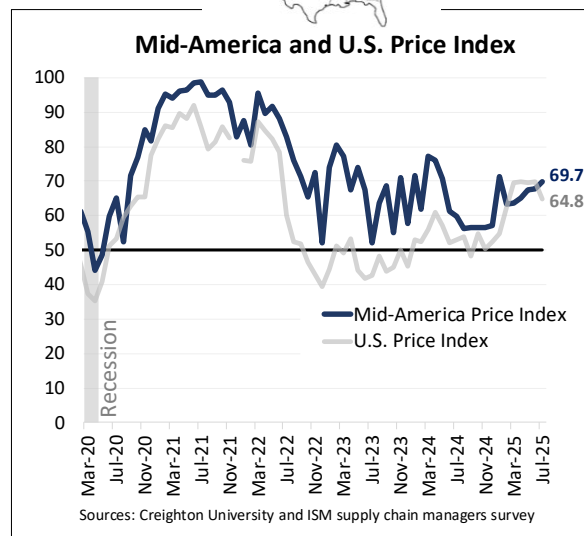
According to the Creighton University survey, the Mid-America wholesale price index increased to 69.7 in July, suggesting that regional manufacturers face growing pricing pressures, especially when compared to the national index (64.8). Since 2020, Mid-America producers have generally seen higher price levels compared to the U.S. average. State-level price indices are not available.

## Missouri Manufacturing Earnings Continue to Rise at a Faster Rate than U.S. Levels

Missouri manufacturing employees earned an average of \$37.49 per hour over the three months ending in June 2025, a 5.6% increase from a year earlier. These figures are based on gross payrolls divided by total hours worked, using preliminary data from the U.S. Bureau of Labor Statistics. Nationally, average hourly earnings for manufacturing workers rose by 4.0% over the same period, reaching \$35.31.

Missouri's manufacturing wage growth also outpaced the state's broader private sector, where average hourly earnings increased by 3.9%. Nationally, private sector earnings increased at a slightly lower rate of 3.8%.

With inflation running at 2.6% year-over-year, wage gains in Missouri's manufacturing and overall private sectors exceeded consumer price increases. This suggests continued real earnings growth for Missouri workers, particularly in manufacturing.



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