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17 RUDARSTVO IN PREDELOVALNE DEJAVNOSTI
MINING AND MANUFACTURING

št./No **25**

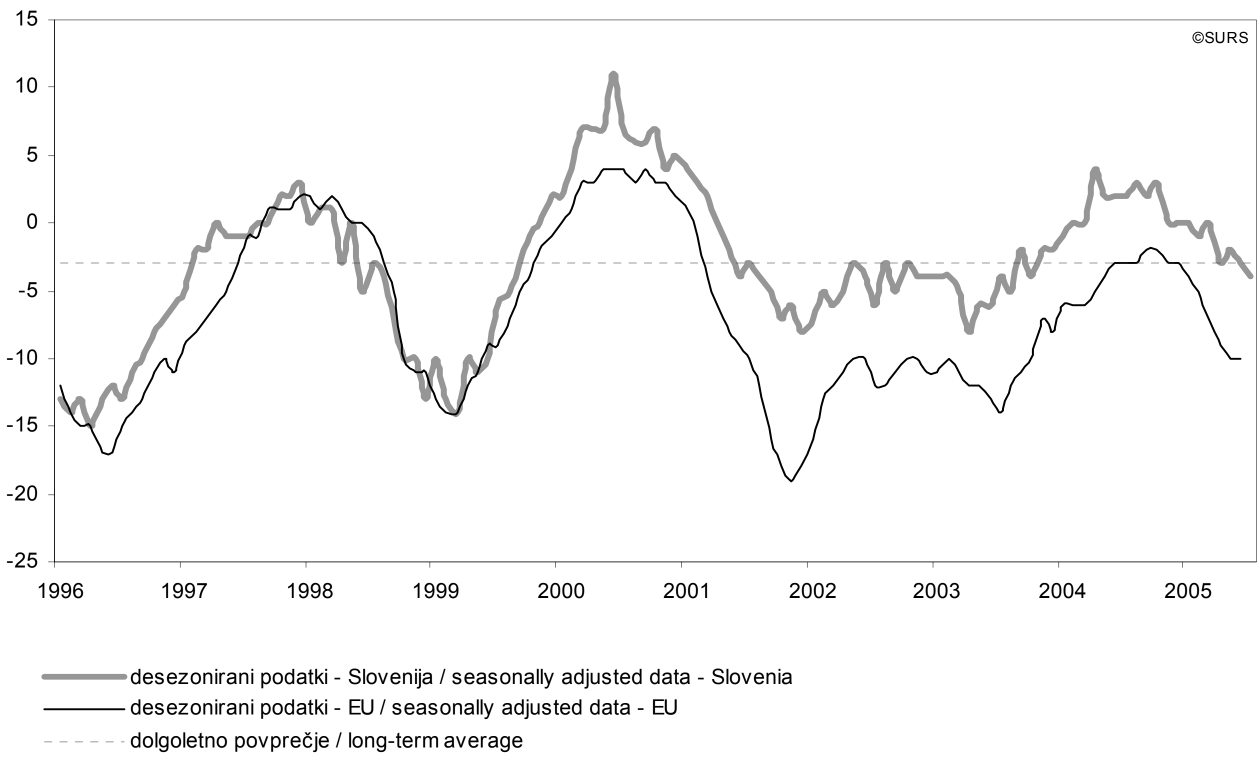
POSLOVNE TENDENCE V PREDELOVALNIH DEJAVNOSTIH, SLOVENIJA, JULIJ 2005

BUSINESS TENDENCY IN MANUFACTURING, SLOVENIA, JULY 2005

- Desezonirana vrednost kazalca zaupanja v predelovalnih dejavnostih je bila v juliju 2005 za 1 odstotno točko nižja kot v juniju 2005. V primerjavi z istim mesecem lani in lanskim povprečjem je vrednost padla za 6 oziroma 5 odstotnih točk.
- Na kazalec zaupanja so vplivala nižja proizvodna pričakovanja in raven skupnih naročil, medtem ko so zaloge končnih izdelkov ostale enake kot v preteklem mesecu.
- Kazalci stanj so v primerjavi s preteklim mesecem večinoma poslabšali, pričakovanja za naslednje tri mesece pa niso ugodna.

- In July 2005 the seasonally adjusted value of the confidence indicator was down by 1 percentage point compared to June 2005. In comparison to July 2004 and last year's average the value fell by 6 percentage points and 5 percentage points, respectively.
- The confidence indicator was influenced by the fall of production expectations and total order-books, while the stocks of finished goods remained the same as in the previous month.
- Observed indicators for appreciation of the situation deteriorated in comparison to the previous month. The expectations for the next three months are not favourable.

Slika 1: KAZALEC ZAUPANJA[1)] V SLOVENIJI IN EU[2)], JANUAR 1996 - JULIJ 2005
Chart 1: CONFIDENCE INDICATOR[1)] IN SLOVENIA AND EU[2)], JANUARY 1996 - JULY 2005



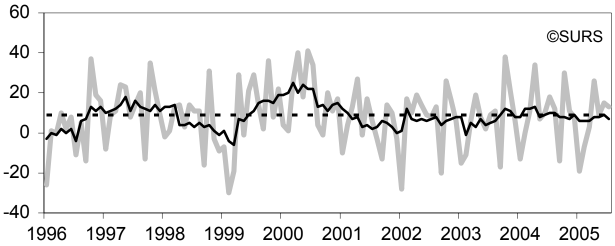
1) Kazalec zaupanja je povprečje odgovorov (ravnotežij) na vprašanja o proizvodnih pričakovanjih, skupnih naročilih in zalogah končnih izdelkov (obrnjen predznak). Podatki so desezonirani. Confidence indicator is an average of responses (balances) to questions on production expectations, total order-books and stocks of finished goods (the latter with inverted sign). Data are seasonally adjusted.

2) Vir / Source: http://europa.eu.int/comm/economy_finance/indicators/businessandconsumersurveys_en.htm. Podatki za EU za zadnji mesec niso na voljo./ Data for EU for the last month are not available.

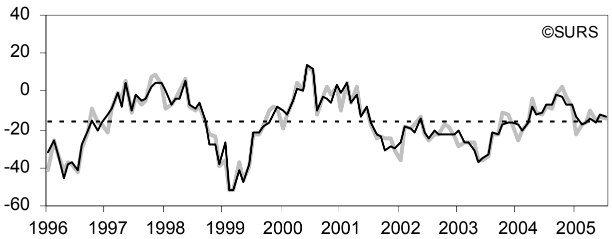
2. GIBANJE EKONOMSKIH KAZALCEV V PREDELOVALNIH DEJAVNOSTIH V SLOVENIJI, JANUAR 1996 - JULIJ 2005
EVOLUTION OF ECONOMIC INDICATORS IN MANUFACTURING IN SLOVENIA, JANUARY 1996 - JULY 2005

Ocena stanj Appreciation of situation	**Pričakovanja v naslednjih 3-4 mesecih** Expectations in the next 3-4 months

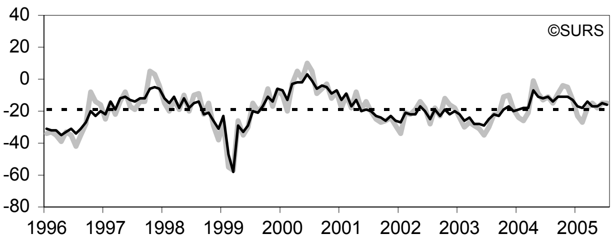
Proizvodnja / Production



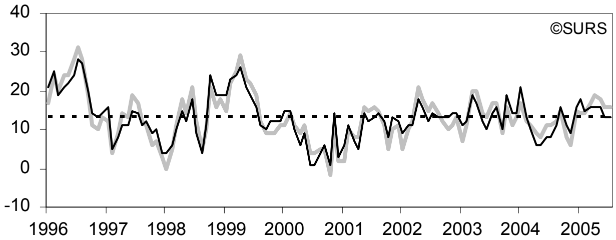
Izvozna naročila / Export order-books



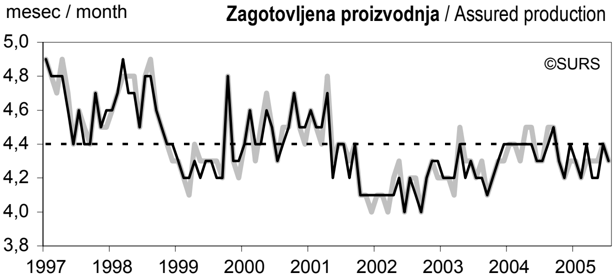
Skupna naročila / Total order-books



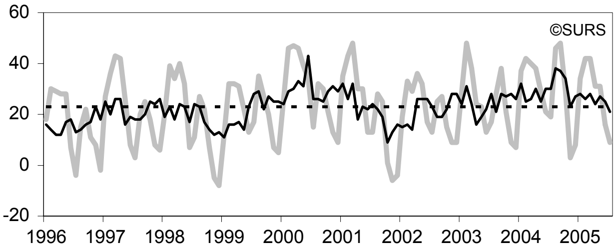
Zaloge končnih izdelkov / Stocks of finished goods



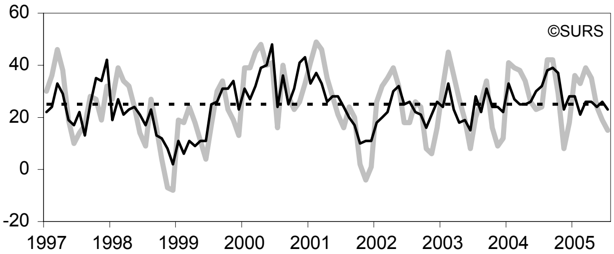
Zagotovljena proizvodnja / Assured production



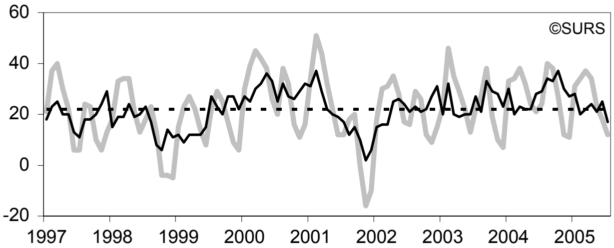
Pričakovana proizvodnja / Production expectations



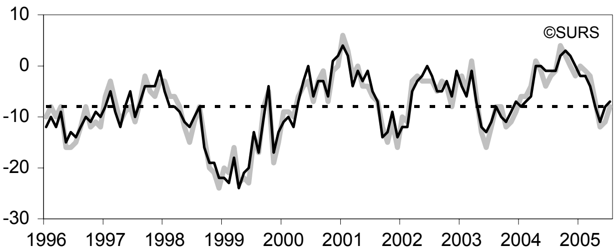
Pričakovan izvoz / Expected export order-books



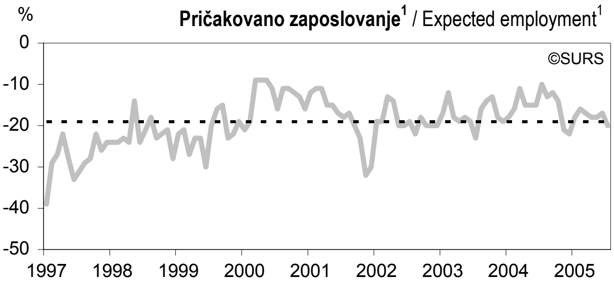
Pričakovano skupno povpraševanje / Expected total demand



Pričakovane cene / Selling price expectations



Pričakovano zaposlovanje[1] / Expected employment[1]



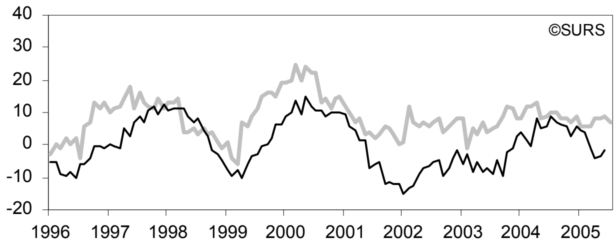
osnovni podatki / raw data — desezonirani podatki / seasonally adjusted data - - - dolgoletno povprečje/ long-term average

1) Sezonska komponenta ni prisotna. / Seasonal component is not included.

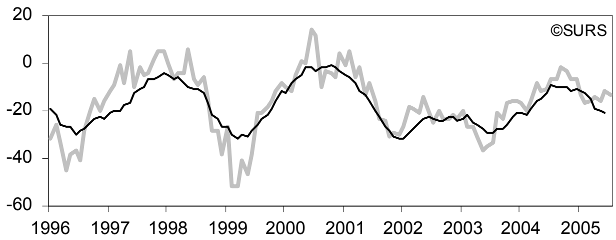
3. GIBANJE EKONOMSKIH KAZALCEV V PREDELOVALNIH DEJAVNOSTIH V SLOVENIJI IN EU, JANUAR 1996 - JULIJ 2005[1)]
EVOLUTION OF ECONOMIC INDICATORS IN MANUFACTURING IN SLOVENIA AND EU, JANUARY 1996 - JULY 2005[1)]

Ocena stanj
Appreciation of situation

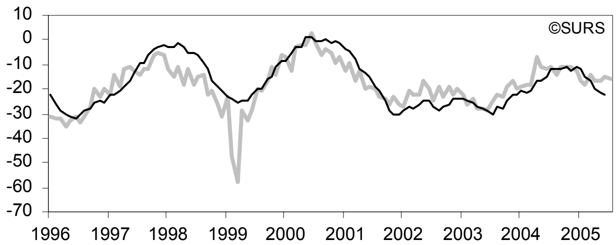
Proizvodnja / Production



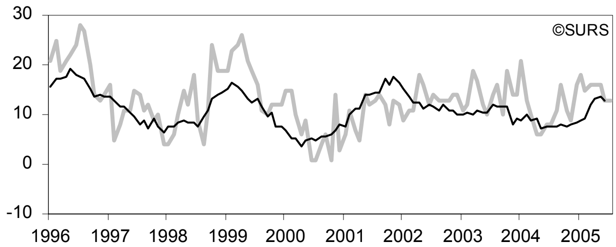
Izvozna naročila / Export order-books



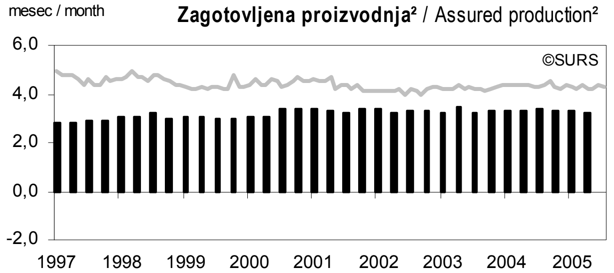
Skupna naročila / Total order-books



Zaloge končnih izdelkov / Stocks of finished goods

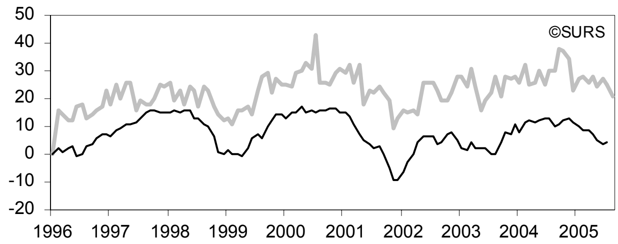


Zagotovljena proizvodnja² / Assured production²

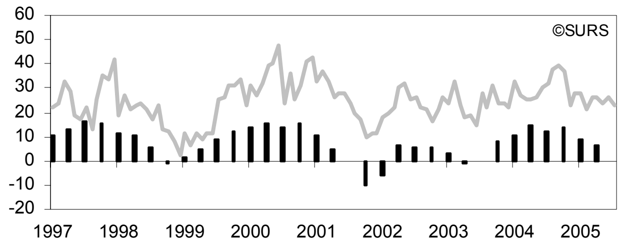


Pričakovanja v naslednjih 3-4 mesecih
Expectations in the next 3-4 months

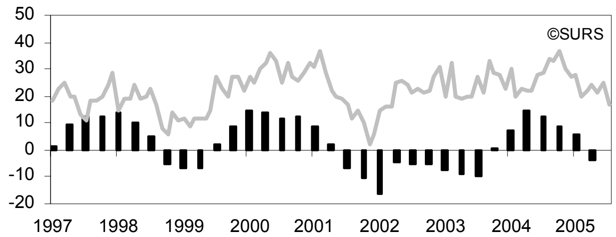
Pričakovana proizvodnja / Production expectations



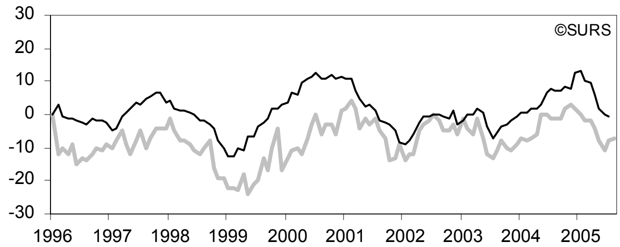
Pričakovan izvoz² / Expected export order-books²



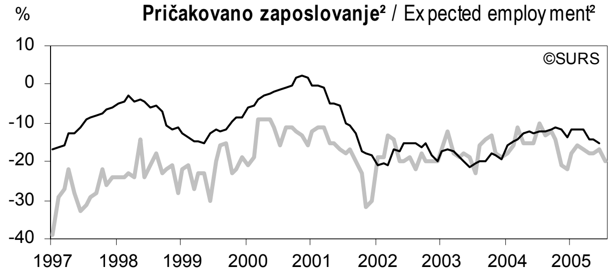
Pričakovano skupno povpraševanje² / Expected total demand²



Pričakovane cene / Selling price expectations



Pričakovano zaposlovanje² / Expected employment²



Slovenija / Slovenia — EU

1) Vir / Source: http://europa.eu.int/comm/economy_finance/indicators/businessandconsumersurveys_en.htm. Podatki o EU za tekoči mesec niso na voljo. Podatki so desezonirani. / Data for current month for EU are not available. Data are seasonally adjusted.

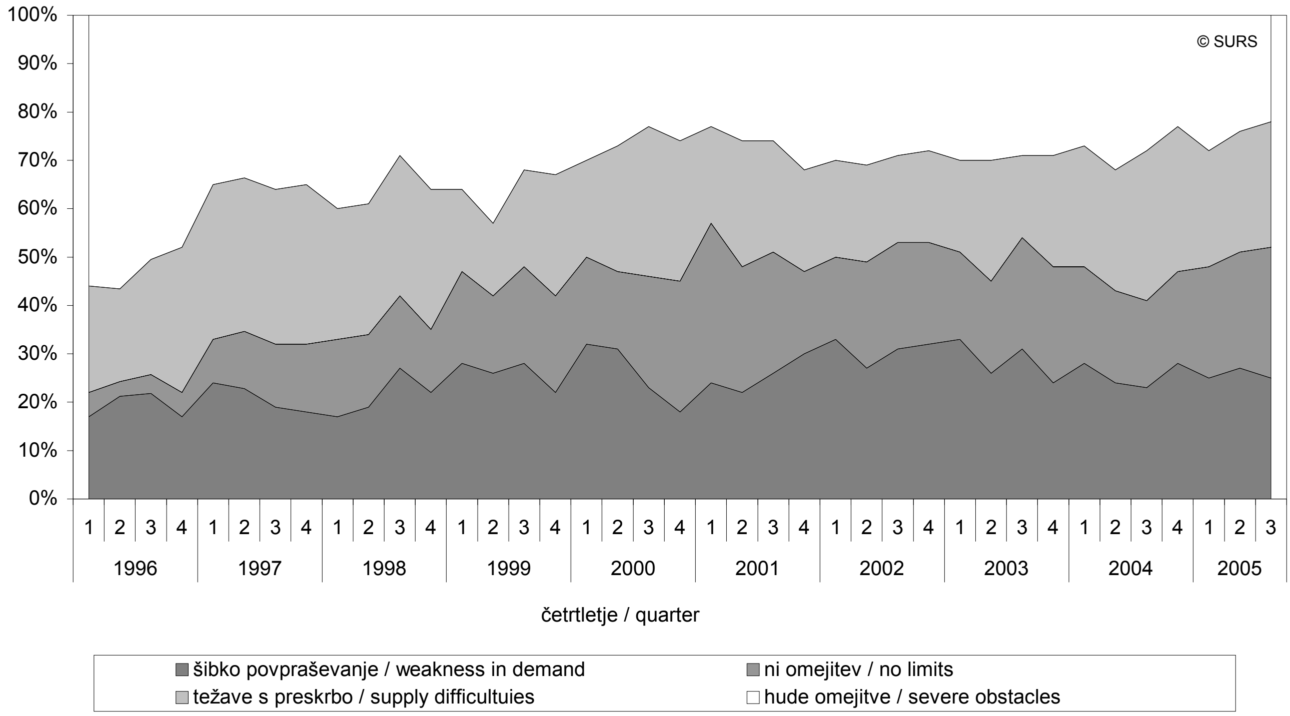
2) Kazalec opazujejo v EU vsake tri mesece. / The indicator in EU is observed every three months.

4. GIBANJE EKONOMSKIH KAZALCEV V PREDELOVALNIH DEJAVNOSTIH V SLOVENIJI IN EU, 1. ČETRTLETJE 1996 - 3. ČETRTLETJE 2005 - ČETRTLETNI PODATKI

EVOLUTION OF ECONOMIC INDICATORS IN MANUFACTURING IN SLOVENIA AND EU, 1st QUARTER 1996 - 3rd QUARTER 2005 - QUARTERLY DATA

4.1 Omejitve v proizvodnji v Sloveniji

Production obstacles in Slovenia



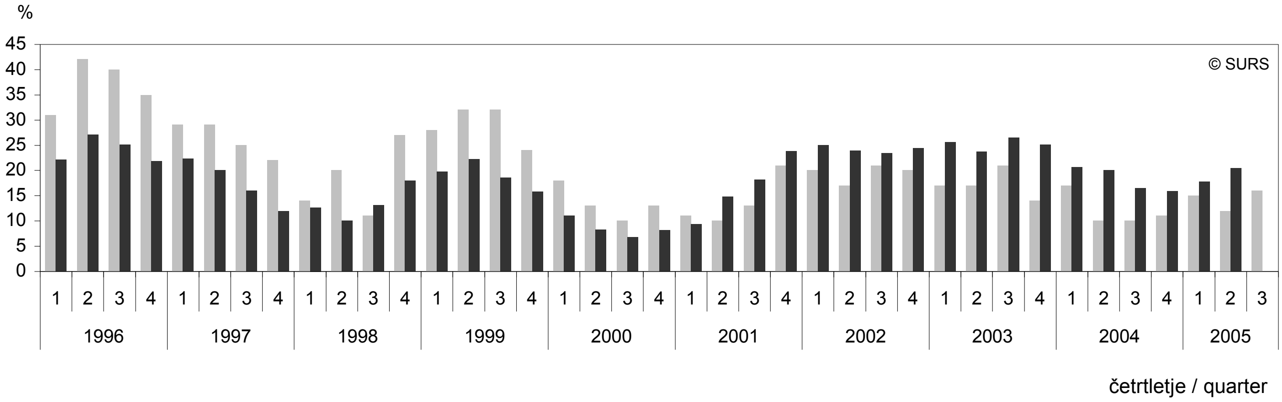
Graf o omejitvah v proizvodnji prikazuje delež zaposlenih, ki se soočajo z naslednjimi skupinami problemov:

- Skupina **"šibko povpraševanje"** zajema zaposlene, ki imajo probleme z nezadostnim domačim povpraševanjem, nezadostnim tujim povpraševanjem in/ali konkurenčnim uvozom.
- Skupina **"ni omejitev"** zajema zaposlene, ki nimajo nobenih proizvodnih težav.
- Skupina **"težave s preskrbo"** zajema zaposlene, ki imajo probleme s pomanjkanjem delavcev, surovin, izdelkov, opreme in/ali finančne probleme. Ta skupina zajema še zaposlene, ki jih pri proizvodnji omejujeta tudi nejasna zakonodaja in negotove gospodarske razmere.
- Skupina **"hude omejitve"** zajema zaposlene, ki imajo hkrati težave tako z dejavniki iz skupine "šibko povpraševanje" kot tudi z dejavniki iz skupine "težave s preskrbo".

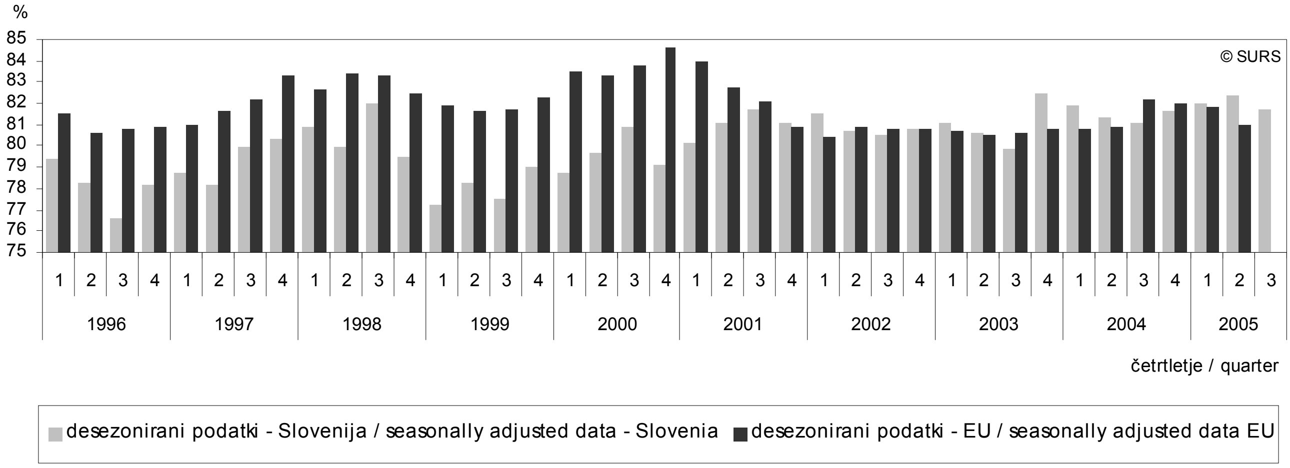
The chart on production obstacles shows the share of employees who are facing the following groups of problems:

- Group **"weakness in demand"** includes employees who are facing insufficient domestic and foreign demand and competitive imports.
- Group **"no limits"** includes employees with no limits to production.
- Group **"supply difficulties"** includes employees who are facing shortage of labour in general, shortage of raw materials and semi-finished products, lack of appropriate equipment, problems with unpaid bills, financial problems, unclear economic conditions.
- Group **"severe obstacles"** includes employees who are facing at the same time problems from the group "weakness in demand" and those from the group "supply difficulties".

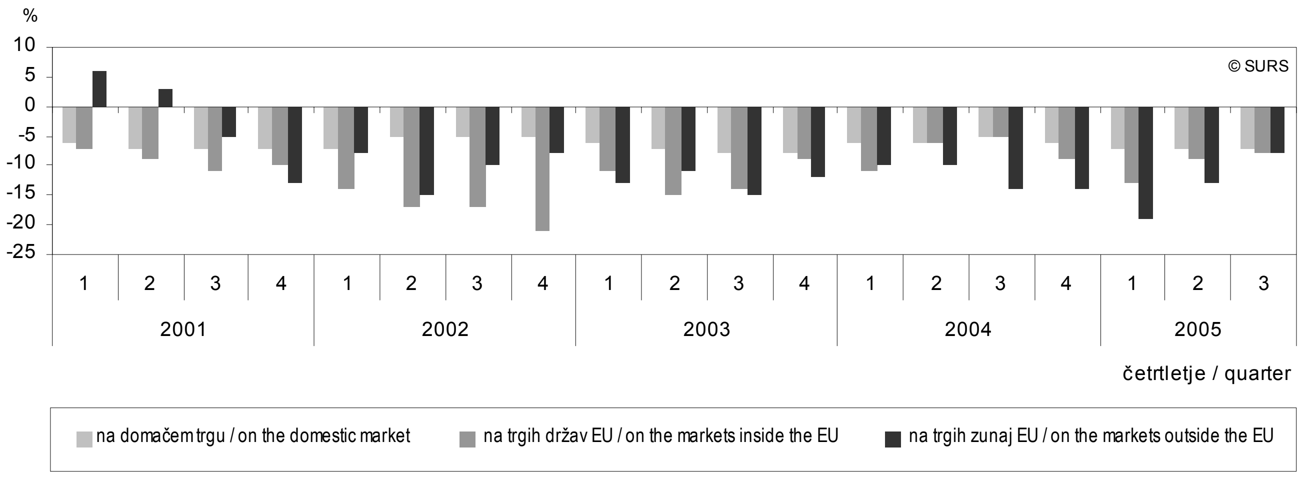
4.2 Ustreznost proizvodnih zmogljivosti glede na pričakovano povpraševanje v naslednjih 12 mesecih, Slovenija in EU
Assessment of current production capacities according to expected demand in the next 12 months, Slovenia and EU



4.3 Izkoriščenost proizvodnih zmogljivosti v Sloveniji in v EU[1]
Current capacity utilisation in Slovenia and EU[1]



4.4 Konkurenčni položaj na domačem trgu, trgih držav članic EU in trgih zunaj EU[2], Slovenija
Competitive position on the domestic market, foreign market inside the EU and outside the EU[2], Slovenia



[1] Prikazana je povprečna stopnja izkoriščenosti (tehnično-tehnoloških, človeških itd.) / The chart shows the average capacity utilisation (technology, human resources, etc)
[2] Podatki so desezonirani. / Data are seasonally adjusted.

METODOLOŠKA POJASNILA

NAMEN STATISTIČNEGA RAZISKOVANJA

Namen kvalitativne Ankete o poslovnih tendencah (PA-IND/M) je mesečno pridobivanje informacij o trenutnih stanjih glavnih ekonomskih kazalcev ter ocenitev njihovega gibanja v naslednjih mesecih. Rezultati anket so osnova za izračun kazalca zaupanja v predelovalnih dejavnostih in kazalca gospodarske klime, ki vključuje poleg kazalca zaupanja v predelovalnih dejavnostih tudi kazalec zaupanja pri potrošnikih in kazalec zaupanja v trgovini na drobno.

Panelno anketo o poslovnih tendencah v predelovalnih dejavnostih izvajamo v Sloveniji od aprila 1995 s poenotenim vprašalnikom, na podlagi poenotene metodologije in z enako periodiko, kot jo izvajajo v državah članicah Evropske unije že več desetletij. Zato so vsi podatki neposredno primerljivi.

ENOTA OPAZOVANJA

Opazujemo podjetja, ki so razvrščena v predelovalne dejavnosti, to je v oddelke Standardne klasifikacije dejavnosti (SKD) od 15 do 36, ter so bila izbrana v panel podjetij na podlagi dveh meril:

- velikosti podjetja (število zaposlenih, skladno z zakonom o gospodarskih družbah) in
- razvrstitve podjetja po SKD-ju.

VIRI

Na vprašalnik odgovarjajo direktorji podjetij ali drugi vodilni delavci med 1. in 10. v mesecu. Rezultate pa objavimo že okoli 20. v istem mesecu.

ZAJETJE

V panelni vzorec smo zajeli vsa velika podjetja, 61 % srednjevelikih (ali 66 % zaposlenih) in 19 % malih podjetij (ali 23 % zaposlenih). Panelni vzorec pokriva 41 % podjetij vzorčnega okvira ali 77 % zaposlenih v predelovalnih dejavnostih.

NAČIN ZBIRANJA PODATKOV

Anketo izvajamo mesečno po pošti, vsako četrtletje (januar, april, julij in oktober) pa mesečni anketi dodamo še sedem četrtletnih vprašanj.

UTEŽEVANJE ODGOVOROV

Odgovori so uteženi tako, da odražajo relativno pomembnost posameznega podjetja v vzorcu. Znotraj oddelkov SKD so odgovori uteženi s številom zaposlenih.

NEODGOVORI

Neodgovore vsak mesec obdelamo skladno s poenoteno metodologijo; delež neodgovorov se giblje med 3 % in 15 % (povprečno 9 %).

DEFINICIJE

Grafikoni prikazujejo ravnotežja po posameznih vprašanjih. Ravnotežje je razlika med pozitivnimi in negativnimi odgovori, izražena v odstotkih. Ravnotežja prikazujejo gibanje opazovanih ekonomskih spremenljivk (stanj in pričakovanj), ne pa dejanskih velikosti ekonomskih kazalcev.

Ko so prikazane daljše časovne vrste podatkov ali primerjave kazalcev z EU-jem, so vrednosti desezonirane. To so vrednosti, pri katerih je izključen vpliv sezone, vsebujejo pa trend-cikel in naključno komponento. Podatki za EU so desezonirani z metodo DAINTIES, za Slovenijo pa z

METHODOLOGICAL EXPLANATIONS

PURPOSE OF STATISTICAL SURVEY

The purpose of the qualitative Survey on Business Tendency (hereinafter: PA-IND/M) is to get monthly information about current situations of major economic indicators and to evaluate their movement in the following months. The results of the survey are the basis for evaluation of the confidence indicator in manufacturing and latter on also for the sentiment indicator, which also includes the consumer confidence indicator and the confidence indicator in retail trade.

We have been carrying out the Survey on Business Tendency in Manufacturing in Slovenia since April 1995 with the harmonised questionnaire, methodology and periodicity, which have been used in EU Member States for several decades. Therefore, all data are directly comparable.

OBSERVATION UNITS

We are monitoring units that are registered in manufacturing - divisions 15 to 36 of the Standard Classification of Activities (SKD). They were selected into the panel by two criteria:

- the size of the enterprise (the number of employees in accordance with the Companies Act) and
- the classification of the enterprise according to the SKD.

SOURCES

Respondents are managers of enterprises or other executives. They respond between the 1st and the 10th in the month. Results are published approximately on the 20th day of the current month.

COVERAGE

The panel includes all large enterprises, 61% of medium-sized enterprises (or 66% of employees) and 19% of small enterprises (or 23% of employees); the panel covers 41% of the enterprises of the studied population or 77% of employees in manufacturing.

METHOD OF DATA COLLECTING

The survey is carried out monthly by mail; we include seven more questions to the monthly survey each quarter (January, April, July and October).

WEIGHTS FOR RESPONSES

Responses to individual questions are weighted so that they reflect the relative importance of an individual enterprise in the panel. Inside divisions of the Standard Classification of Activities (SKD) responses are weighted with the number of employees.

NON-RESPONSES

Non-responses are processed every month according to the harmonised methodology and vary between 3% and 15% (9% on average).

DEFINITIONS

The charts show the balance by individual questions. The balance is the difference between positive and negative answers, expressed in percent. The balance shows the movement of observed economic variables (present situation and future expectations), and not the real size of economic indicators.

In the charts with longer time series or by comparisons with EU indicators, data are seasonally adjusted. Values are adjusted for the seasonal component, but include the trend-cycle component and the irregular component. Data for EU are seasonally adjusted by the metodo TRAMO/SEATS, ki temelji na modelih ARIMA. Pri oblikovanju modelov je upoštevano časovno obdobje od maja 1995 do januarja 2005, pri časovnih vrstah pričakovan izvoz, pričakovano skupno povpraševanje in povprečno število mesecev zagotovljene proizvodnje od januarja 1997 do januarja 2005, pri časovni vrsti stopnja izkoriščenosti zmogljivosti od drugega četrtletja 1995 do prvega četrtletja 2005, pri časovnih vrstah konkurenčni položaj podjetja na domačem trgu, konkurenčni položaj podjetja na trgih držav članic Evropske unije in konkurenčni položaj podjetja na trgih zunaj Evropske unije pa od prvega četrtletja 2001 do prvega četrtletja 2005. Zaradi narave podatkov se model za leto 2005 razlikuje v primerjavi z modelom za leto 2004 pri skupnih naročilih. Pri časovnih vrstah pričakovano zaposlovanje in stopnja izkoriščenosti zmogljivosti sezonska komponenta ni prisotna.

Kazalec zaupanja je povprečje odgovorov (ravnotežij) na vprašanja o proizvodnih pričakovanjih, skupnih naročilih in zalogah končnih izdelkov (obrnjen predznak).

DAINTIES method and for Slovenia by the TRAMO/SEATS method, which is based on ARIMA models. The designing of the models is based on the time period from May 1995 to January 2005, the series expected export order-books, expected total demand and average assured production from January 1997 to January 2005, the series level of capacity utilisation from the second quarter of 1995 to the first quarter of 2005, and the series competitive position on the domestic market, competitive position on the foreign markets inside the EU and competitive position on the markets outside the EU from the first quarter of 2001 to the first quarter of 2005. Because of the nature of data, the model for 2005 differs from the model used in 2004 by total order-books. In the time series expected employment and level of capacity utilisation the seasonal component is not present.

The confidence indicator is defined as the arithmetic mean of the answers (balances) to the questions on production expectation, assessment of overall order-books and assessment of stocks of finished goods (the latter with an inverted sign).

OBJAVLJANJE PODATKOV

Sodelujoči v anketi prejmejo informacijo o oddelku SKD, v katerega se po dejavnosti razvrščajo in o predelovalnih dejavnostih, vendar le, če so izpolnili vprašalnik za tekoči mesec.

Drugim uporabnikom so dostopni podatki na ravni predelovalnih dejavnosti in njenih oddelkov in po velikostnih razredih podjetij. Podatki so mesečno objavljeni v Statističnih informacijah – Poslovne tendence v predelovalnih dejavnostih in v podatkovni bazi SI-STAT na naslovu http://www.stat.si/.

PUBLISHING

Respondents participating in the survey receive the special information for division in which they are classified and for manufacturing. They receive it only if they responded in the current month.

Other users can get data for manufacturing and its divisions and data for different size groups of enterprises. Data are published in the monthly Rapid Reports – Business tendency in manufacturing and in the database SI-STAT which is available on http://www.stat.si/eng/.

MESEČNA VPRAŠANJA

- Proizvodni ritem v opazovanem mesecu: živahnejši, enak, šibkejši?
- Ocena ravni izvoznih naročil: višja kot normalno, normalna, nižja kot normalno?
- Ocena ravni skupnih naročil: višja kot normalno, normalna, nižja kot normalno?
- Ocena ravni zalog končnih izdelkov: višja kot normalno, normalna, nižja kot normalno?
- Pričakovana proizvodnja v naslednjih 3 mesecih: naraščala, nespremenjena, padala?
- Pričakovane cene v naslednjih 3 mesecih: naraščale, nespremenjene, padale?
- Pričakovano število zaposlenih v naslednjih 3 mesecih: povečalo, ostalo nespremenjeno, zmanjšalo?
- Pričakovan izvoz v naslednjih 3 mesecih: naraščal, nespremenjen, padal?
- Pričakovano skupno povpraševanje v naslednjih 3 mesecih: krepilo, enako, slabelo?
- Ob sedanjem proizvodnem ritmu je zagotovljena proizvodnja za: .... mesecev?

MONTHLY QUESTIONS

- Production rhythm in the observed month: increased, remain unchanged, decreased?
- Assessment of current export order-books: above normal, normal, below normal?
- Assessment of current total order-books: above normal, normal, below normal?
- Assessment of current stock of finished goods: above normal, normal, below normal?
- Production expectations over the next 3 months: increase, remain unchanged, decrease?
- Selling prices expectations over the next 3 months: increase, remain unchanged, decrease?
- Firm's total employment expectations over the next 3 months: increase, remain unchanged, decrease?
- Export orders expectations over the next 3 months: increase, remain unchanged, decrease?
- Expected total demand over the next 3 months: increase, remain unchanged, decrease?
- Duration of production assured by current total order-books: for … months?

ČETRTLETNA VPRAŠANJA

- Omejitveni dejavniki v proizvodnji: ni omejitev, nezadostno domače povpraševanje, nezadostno tuje povpraševanje, konkurenčen uvoz, pomanjkanje delavcev na splošno, pomanjkanje usposobljenih delavcev, pomanjkanje surovin, pomanjkanje polizdelkov, pomanjkanje ustrezne opreme, neplačništvo, finančni problemi, nejasna gospodarska zakonodaja, negotove gospodarske razmere, ostalo?
- Sedanje proizvodne zmogljivosti: prevelike, ustrezne, premajhne?
- Sedanja stopnja izkoriščenosti zmogljivosti: .... odstotkov?
- Konkurenčni položaj podjetja na domačem trgu v zadnjih 3 mesecih: boljši, nespremenjen, slabši?

QUARTERLY QUESTIONS

- Limits to production: none, insufficient domestic demand, insufficient foreign demand, competitive imports, shortage of labour in general, shortage of skilled labour, shortage of raw materials, shortage of semi-finished products, lack of appropriate equipment, problems with unpaid bills, financial problems, unclear economic legislation, uncertain economic conditions, other?
- Assessment of current production capacity: more than sufficient, sufficient, not sufficient?
- Current level of capacity utilisation: in percentage of full capacity?
- Competitive position on the domestic market over the past 3 months: improved, remained unchanged, deteriorated?

- Konkurenčni položaj podjetja na trgih držav članic Evropske unije v zadnjih 3 mesecih: boljši, nespremenjen, slabši?
- Konkurenčni položaj podjetja na trgih izven Evropske unije v zadnjih 3 mesecih: boljši, nespremenjen, slabši?
- Obseg novih naročil se je v zadnjih 3 mesecih: povečal, ostal nespremenjen, zmanjšal?

KOMENTAR

Desezonirana vrednost kazalca zaupanja v predelovalnih dejavnostih je bila v juliju 2005 za 1 odstotno točko nižja kot v juniju 2005. V primerjavi z istim mesecem lani in lanskim povprečjem pa je njena vrednost padla za 6 oziroma 5 odstotnih točk.

PROIZVODNJA in PRIČAKOVANA PROIZVODNJA

Desezonirana vrednost kazalca proizvodnje je bila v primerjavi s preteklim mesecem nižja za 2 odstotni točki. Glede na isti mesec lani je bila nižja za 5 odstotnih točk in 3 odstotne točke pod lanskim povprečjem.

Tudi desezonirana vrednost kazalca proizvodnih pričakovanj za naslednje 3 mesece je bila v vseh treh primerjavah nižja: v primerjavi s preteklim mesecem je bila nižja za 4 odstotne točke, v primerjavi z istim mesecem lani za 10 odstotnih točk in 9 odstotnih točk pod lanskim povprečjem.

IZVOZNA NAROČILA in PRIČAKOVANI IZVOZ

Desezonirana vrednost kazalca ravni izvoznih naročil je bila v primerjavi s preteklim mesecem nižja za 1 odstotno točko. Glede na isti mesec lani je bila nižja za 6 odstotnih točk, od lanskega povprečja pa je bila nižja za 3 odstotne točke.

Desezonirana vrednost kazalca pričakovanega izvoza za naslednje 3 mesece je bila v primerjavi s preteklim mesecem nižja za 3 odstotne točke, v primerjavi z istim mesecem lani je bila nižja za 9 odstotnih točk, od povprečja lanskega leta pa za 7 odstotnih točk.

SKUPNA NAROČILA in PRIČAKOVANO SKUPNO POVPRAŠEVANJE

Desezonirana vrednost kazalca ravni skupnih naročil je bila v primerjavi s preteklim mesecem nižja za 1 odstotno točko. Glede na isti mesec lani je bila nižja za 4 odstotne točke in za 3 odstotne točke pod povprečjem lanskega leta.

Desezonirana vrednost kazalca pričakovanega skupnega povpraševanja za naslednje 3 mesece je bila v primerjavi s preteklim mesecem nižja za 8 odstotnih točk, glede na isti mesec lani je bila nižja za 12 odstotnih točk, od lanskega povprečja pa je bila nižja za 11 odstotnih točk.

ZALOGE KONČNIH IZDELKOV

Desezonirana vrednost kazalca ravni zalog končnih izdelkov je bila enaka kot pretekli mesec. Glede na isti mesec lani je bila višja za 5 odstotnih točk in 2 odstotni točki nad povprečjem lanskega leta.

PRIČAKOVANE CENE

Desezonirana vrednost kazalca cenovnih pričakovanj za naslednje 3 mesece je bila za 1 odstotno točko višja kot v preteklem mesecu. V primerjavi z istim mesecem lani in povprečjem lanskega leta je bila nižja za 6 odstotnih točk.

- Competitive position on the foreign markets inside the EU over the past 3 months: improved, remained unchanged, deteriorated?
- Competitive position on the markets outside the EU over the past 3 months: improved, remained unchanged, deteriorated?
- New orders over the past 3 months: increased, remain unchanged, decreased?

COMMENT

In July 2005 the seasonally adjusted value of the confidence indicator was down by 1 percentage point compared to June 2005. In comparison to July 2004 and last year’s average the value fell by 6 percentage points and 5 percentage points, respectively.

PRODUCTION and PRODUCTION EXPECTATIONS

The seasonally adjusted value of the production indicator was down by 2 percentage points compared to the previous month. Compared to July 2004 it was down by 5 percentage points and 3 percentage points below last year’s average.

The seasonally adjusted value of production expectations for the next three months fell by 4 percentage points compared to the previous month. Compared to July 2004 it was down by 10 percentage points and 9 percentage points below last year’s average.

EXPORT ORDER-BOOKS and EXPECTED EXPORT ORDER-BOOKS

The seasonally adjusted value of the export order-books indicator was down by 1 percentage point compared to the previous month. Compared to July 2004 it was down by 6 percentage points and compared to last year’s average by 3 percentage points.

The seasonally adjusted value of expected export order-books in the next three months was down by 3 percentage points compared to the previous month. Compared to July 2004 it was down by 9 percentage points and 7 percentage points below last year’s average.

TOTAL ORDER-BOOKS and EXPECTED TOTAL DEMAND

The seasonally adjusted value of the total order-books indicator fell by 1 percentage point compared to the previous month. Compared to July 2004 it was down by 4 percentage points and 3 percentage points below last year’s average.

The seasonally adjusted value of expected total demand for the next three months fell by 8 percentage points compared to the previous month. Compared to July 2004 it was down by 12 percentage points and 11 percentage points below last year’s average.

STOCKS OF FINISHED GOODS

The seasonally adjusted value of the stocks of finished goods indicator was the same as in the previous month. Compared to July 2004 it was up by 5 percentage points and compared to last year’s average by 2 percentage points.

SELLING PRICE EXPECTATIONS

The seasonally adjusted value of selling price expectations for the next three months rose by 1 percentage point compared to the previous month. Compared to July 2004 and last year’s average it was down by 6 percentage points.

ZAGOTOVLJENA PROIZVODNJA

Ob julijskem proizvodnem ritmu imajo podjetja zagotovljeno proizvodnjo v povprečju za 4,3 meseca. To je enako kot lani v tem mesecu, hkrati pa za 0,1 odstotne točke pod povprečjem lanskega leta.

Največ podjetij (19 %) ima proizvodnjo zagotovljeno v povprečju za 3 mesece. Sledijo podjetja (17,2 %), ki imajo proizvodnjo zagotovljeno v povprečju za 2 meseca in podjetja (16,9 %), ki imajo proizvodnjo zagotovljeno v povprečju za več kot 10 mesecev. Za pol meseca ima zagotovljeno proizvodnjo v povprečju 7,9 % podjetij. Ob julijskem proizvodnem ritmu pa nima zagotovljene proizvodnje v povprečju 1,8 % podjetij.

PRIČAKOVANO ZAPOSLOVANJE

Vrednost kazalca pričakovanj glede zaposlovanja v naslednjih 3 mesecih je bila za 3 odstotne točke nižja kot v preteklem mesecu. V primerjavi z istim mesecem lani je bila nižja za 10 odstotnih točk, za 5 odstotnih točk pa je bila nižja od povprečja lanskega leta.

OMEJITVE V PROIZVODNJI

V juliju 2005 ni imelo omejitev v proizvodnji 27 % zaposlenih (oziroma 18 % podjetij). Glede na isti mesec lani je bil ta odstotek višji za 8 odstotnih točk in 9 odstotnih točk nad lanskim povprečjem.

Sledili so omejitveni dejavniki iz skupine težave s preskrbo. V tem mesecu se je z njimi srečevalo 26 % zaposlenih (oziroma 31 % podjetij), kar je za 2 odstotni točki manj kot v lanskem juliju in za 5 odstotnih točk manj od lanskega povprečja.

Z dejavniki iz skupine hude omejitve se je v tem mesecu srečalo 24 % zaposlenih (oziroma 25 % podjetij) v predelovalnih dejavnostih. Glede na isti mesec lani je bil ta odstotek nižji za 8 odstotnih točk in 4 odstotne točke pod lanskim povprečjem.

V tem mesecu se je z omejitvenimi dejavniki iz skupine šibko povpraševanje spopadalo 25 % zaposlenih (oziroma 26 % podjetij), kar je za 1 odstotno točko manj kot lani v tem mesecu in za 2 odstotni točki več od povprečja lanskega leta.

Podrobnejši pregled omejitvenih dejavnikov v proizvodnji pokaže, da je/so julija 2005[1]:

- 32 % zaposlenih (ali 31 % podjetij) omejevalo nezadostno tuje povpraševanje;
- 29 % zaposlenih (ali 34 % podjetij) omejevalo nezadostno domače povpraševanje;
- 28 % zaposlenih (ali 18 % podjetij)) ni imelo proizvodnih omejitev;
- 18 % zaposlenih (ali 19 % podjetij) omejeval konkurenčni uvoz;
- 16 % zaposlenih (ali 19 % podjetij) omejevalo pomanjkanje usposobljenih delavcev;
- 14 % zaposlenih (ali 17 % podjetij) omejevale neporavnane obveznosti iz poslovanja;
- 12 % zaposlenih (ali 10 % podjetij) imelo težave zaradi negotovih gospodarskih razmer;
- 9 % zaposlenih (ali 10 % podjetij) omejevali drugi dejavniki, npr. nelojalna konkurenca, tečajna politika, pomanjkanje zmogljivosti, visoki stroški dela;

ASSURED PRODUCTION

With the same production rhythm as in July 2005, production in enterprises is assured on average for the next 4.3 months. This is the same as in July 2004 and 0.1 percentage point below last year's average.

In most enterprises (19%) production is assured for three months. They are followed by enterprises whose production is assured for two months (17.2%) and those whose production is assured for more than ten months (16.9%). Should the July production rhythm continue, 7.9% of enterprises have production assured for half a month while 1.8% of enterprises have no assured production.

EXPECTED EMPLOYMENT

The value of expected employment for the next three months fell by 3 percentage points compared to the previous month. Compared to July 2004 and last year's average it was down by 10 percentage points and 5 percentage points, respectively.

LIMITS TO PRODUCTION

In July 2005, 27% of employees (18% of enterprises) faced no limits, which is 8 percentage points more than in July 2004 and 9 percentage points above last year's average.

The second most important limits were supply difficulties. In July 2005, 26% of employees (31% of enterprises) faced these limits, which is 2 percentage points less than in July 2004 and 5 percentage points below last year's average.

The third most important limits were severe obstacles. In July 2005, 24% of employees (25% of enterprises) faced these limits, which is 8 percentage points less than in July 2004 and 4 percentage points below last year's average.

Among factors limiting production, demand difficulties prevailed. In July 2005, 25% of employees (26% of enterprises) faced these limits, which is 1 percentage point less than in July 2004 and 2 percentage points above last year's average.

A more detailed overview of limits to production shows that in July 2005[1]:

- 32% of employees (or 31% of enterprises) were limited by insufficient foreign demand,
- 29% of employees (or 34% of enterprises) were limited by insufficient domestic demand,
- 28% of employees (or 18% of enterprises) experienced no limits,
- 18% of employees (or 19% of enterprises) were limited by competitive imports,
- 16% of employees (or 19% of enterprises) were limited by shortage of skilled labour,
- 14% of employees (or 17% of enterprises) were limited by problems with unpaid bills,
- 12% of employees (or 10% of enterprises) were limited by uncertain economic conditions,
- 9% of employees (or 10% of enterprises) were limited by other factors such as unfair competition, exchange-rate policy, lack of capacity, high labour costs,

[1] Podjetja lahko označijo več dejavnikov, ki omejujejo njihovo proizvodnjo, zato vsota odstotkov ni 100 %. / Enterprises can select several factors limiting their business, so the total is not 100%.

- 8 % zaposlenih (ali 13 % podjetij) omejevali finančni problemi, kot so neugodni pogoji kreditiranja, težave pri pridobivanju kreditov itd;
- 8 % zaposlenih (ali 9 % podjetij) omejevalo pomanjkanje ustrezne opreme;
- 4 % zaposlenih (ali 6 % podjetij) omejevalo pomanjkanje surovin;
- 4 % zaposlenih (ali 6 % podjetij) omejevalo pomanjkanje delavcev na splošno;
- 3 % zaposlenih (ali 3 % podjetij) omejevala nejasna gospodarska zakonodaja;
- 3 % zaposlenih (ali 2 % podjetij) omejevalo pomanjkanje polizdelkov.

Največja omejitev v proizvodnji je bilo nezadostno tuje povpraševanje, sledile so nezadostno domače povpraševanje, konkurenčni uvoz in pomanjkanje usposobljenih delavcev.

IZKORIŠČENOST ZMOGLJIVOSTI

Julijska povprečna izkoriščenost zmogljivosti je bila 81,7-odstotna ali za 0,7 odstotne točke nižja kot aprila 2005. V primerjavi z istim mesecem lani je bila za 0,6 odstotne točke višja in za 0,3 odstotne točke pod lanskim povprečjem.

USTREZNOST PROIZVODNIH ZMOGLJIVOSTI

Ocena ustreznosti proizvodnih zmogljivosti glede na pričakovano povpraševanje v naslednjih dvanajstih mesecih je bila višja kot v zadnjem opazovanem mesecu. V primerjavi z istim mesecem lani je bila višja za 6 odstotnih točk in 4 odstotne točke nad povprečjem lanskega leta.

KONKURENČNI POLOŽAJ

Desezonirana ocena konkurenčnega položaja podjetij na domačem trgu je bila enaka kot aprila 2005. Glede na isti mesec lani je bila nižja za 2 odstotni točki in za 1 odstotno točko pod lanskim povprečjem.

Desezonirana ocena konkurenčnega položaja podjetij na trgih držav članic EU je bila v primerjavi z aprilom 2005 višja za 1 odstotno točko. Glede na isti mesec lani je bila nižja za 3 odstotne točke in enaka kot lansko povprečje.

Desezonirana ocena konkurenčnega položaja podjetij na trgih zunaj EU je bila v primerjavi z aprilom 2005 višja za 5 odstotnih točk. Glede na isti mesec lani je bila nižja za 6 odstotnih točk in za 4 odstotne točke pod lanskim povprečjem.

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- 8% of employees (or 13% of enterprises) were limited by financial problems such as unfavourable credit terms, difficulties in obtaining credits, etc.,
- 8% of employees (or 9% of enterprises) were limited by lack of appropriate equipment,
- 4% of employees (or 6% of enterprises) were limited by shortage of raw materials,
- 4% of employees (or 6% of enterprises) were limited by shortage of labour in general,
- 3% of employees (or 3% of enterprises) were limited by unclear economic legislation,
- 3% of employees (or 2% of enterprises) was limited by shortage of semi-finished products.

The most important factor limiting production is insufficient foreign demand, followed by insufficient domestic demand, competitive imports and shortage of skilled labour.

CAPACITY UTILISATION

In July 2005 the average capacity utilisation was 81.7%, which is 0.7 percentage point lower than in April 2005. Compared to July 2004 it was up by 0.6 percentage point and 0.3 percentage point below last year's average.

CURRENT PRODUCTION CAPACITY

The assessment of current production capacity in comparison with expected demand in the next 12 months was higher than in April 2005. Compared to July 2004 it was up by 6 percentage points and 4 percentage points above last year's average.

COMPETITIVE POSITION

The seasonally adjusted assessment of competitive position on the domestic market was the same as in April 2005. Compared to July 2004 it was down by 2 percentage points and 1 percentage point below last year's average.

Compared to April 2005, the seasonally adjusted assessment of enterprise's competitive position on markets of the EU Member States was up by 1 percentage point. It was down by 3 percentage points compared to July 2004 and the same as last year's average.

Compared to April 2005, the seasonally adjusted assessment of enterprise's competitive position on the markets outside EU was up by 5 percentage points. Compared to July 2004 it was down by 6 percentage points and 4 percentage points below last year's average.

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