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17 RUDARSTVO IN PREDELOVALNE DEJAVNOSTI
MINING AND MANUFACTURING

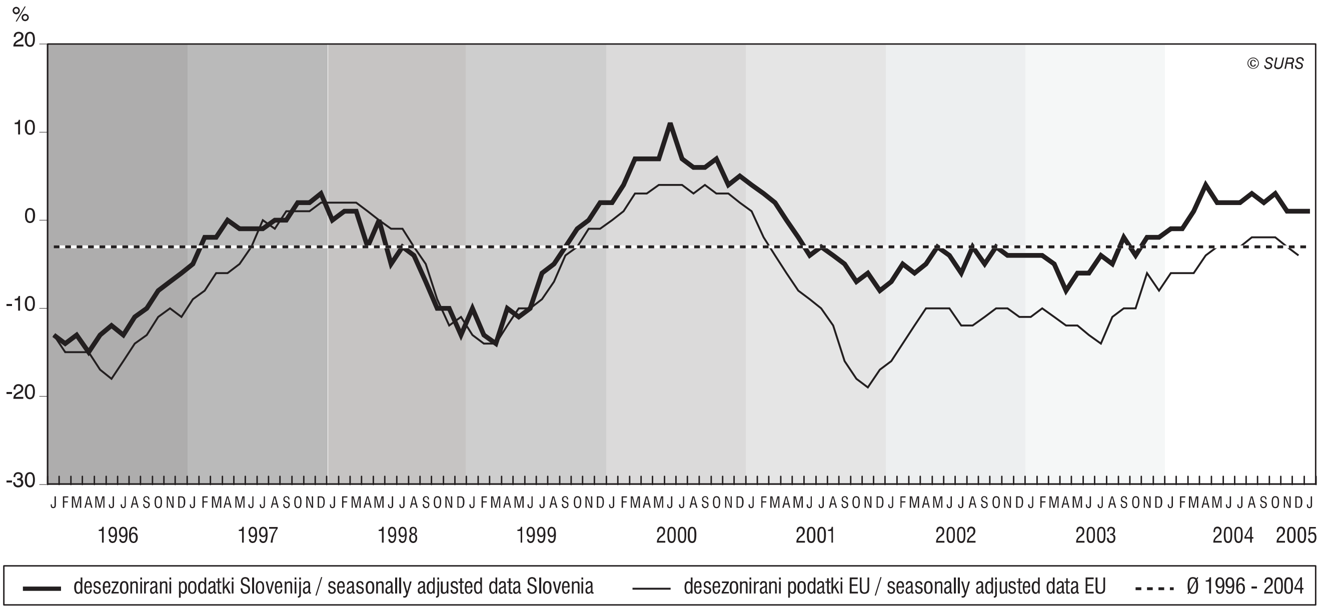
št./No 6

POSLOVNE TENDENCE V PREDELOVALNIH DEJAVNOSTIH, SLOVENIJA, JANUAR 2005
BUSINESS TENDENCY IN MANUFACTURING, SLOVENIA, JANUARY 2005

- Desezonirana vrednost kazalca zaupanja v predelovalnih dejavnostih je bila v januarju 2005 enaka kot v decembru 2004 in enaka kot v istem mesecu lani, hkrati pa za 1 odstotno točko nižja od lanskega povprečja.
- Na gibanje kazalca zaupanja v tem mesecu so vplivala večja proizvodna pričakovanja in zaloge končnih izdelkov ter znižanje ravni skupnih naročil, vendar se je njihovo gibanje ravno izničilo, tako da je vrednost kazalca zaupanja ostala enaka kot pretekli mesec.
- Kazalci stanj so se v primerjavi s preteklim mesecem večinoma poslabšali. Pričakovanja za naslednje tri mesece so ugodna.

- In January 2005, the seasonally adjusted value of the confidence indicator in manufacturing was the same as in December 2004 and January 2004, but 1 percentage point below last year's average.
- The evolution of the confidence indicator in this month was influenced by the rise of production expectations and stocks of finished products as well as by the fall of overall order books; however, their opposite influence on the confidence indicator caused no change in its value.
- Observed indicators for appreciation of the situation deteriorated compared to the previous month. The expectations for the next three months are favourable.

I. KAZALEC ZAUPANJA[1] V SLOVENIJI IN EU[2], JANUAR 1996 - JANUAR 2005
I. CONFIDENCE INDICATOR[1] IN SLOVENIA AND EU[2], JANUARY 1996 - JANUARY 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, overall order books and stocks of finished products (the latter with inverted sign). Data are seasonally adjusted.

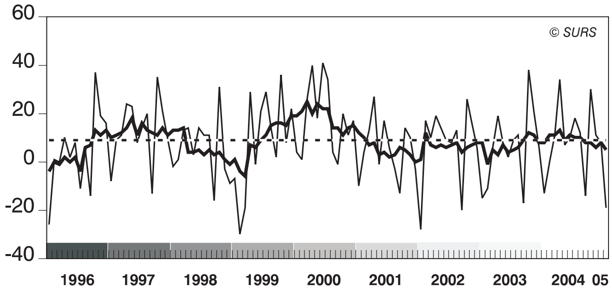
[2] Vir podatkov je Evropska komisija. Podatki o EU za zadnji mesec nam niso na voljo.
Source for EU data is European Commission. Data for EU for the last month are not available.

2. GIBANJE EKONOMSKIH KAZALCEV V PREDELOVALNIH DEJAVNOSTIH V SLOVENIJI, JANUAR 1996 - JANUAR 2005

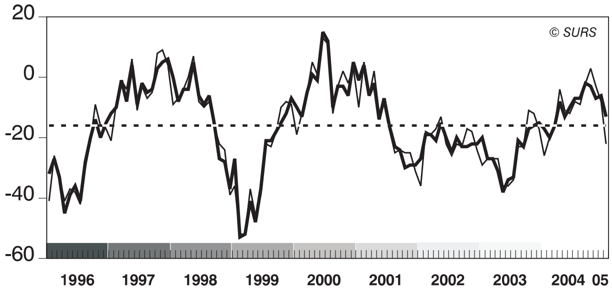
2. EVOLUTION OF ECONOMIC INDICATORS IN MANUFACTURING IN SLOVENIA, JANUARY 1996 - JANUARY 2005

Ocena stanj / Appreciation of situation

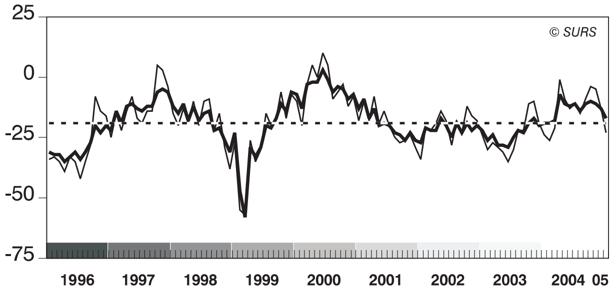
Proizvodnja / Production



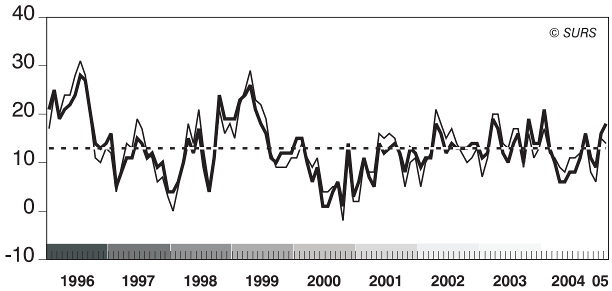
Izvozna naročila / Export order books



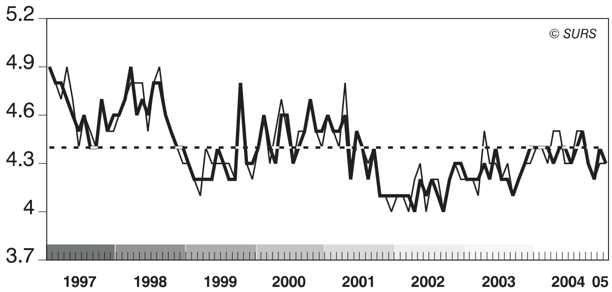
Skupna naročila / Overall order books



Zaloge končnih izdelkov / Stocks of finished products

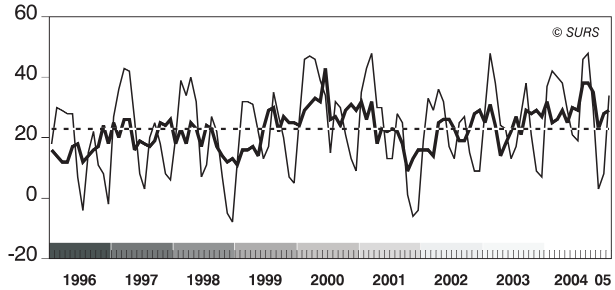


Zagotovljena proizvodnja / Assured production

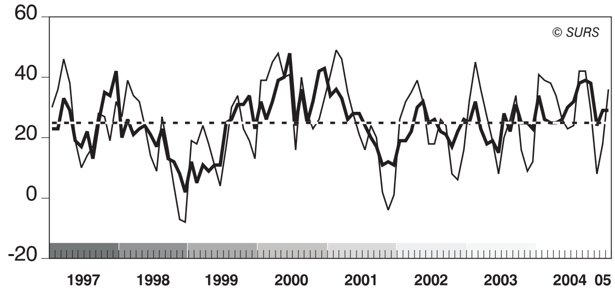


Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months

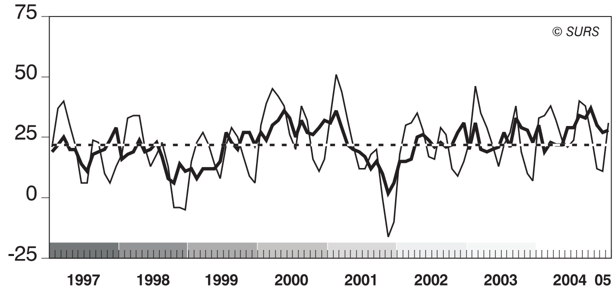
Pričakovana proizvodnja / Production expectations



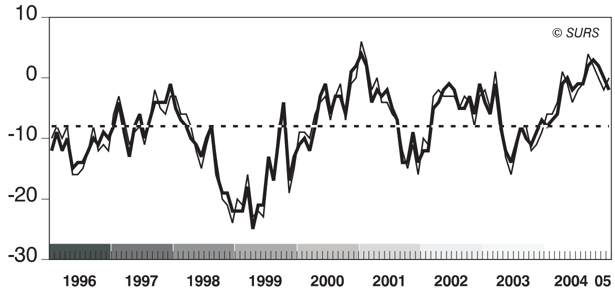
Pričakovan izvoz / Expected export order books



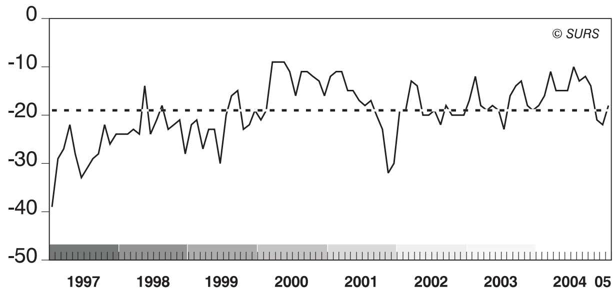
Pričakovano skupno povpraševanje / Expected total demand



Pričakovane cene / Selling price expectations



Pričakovano zaposlovanje / Expected employment



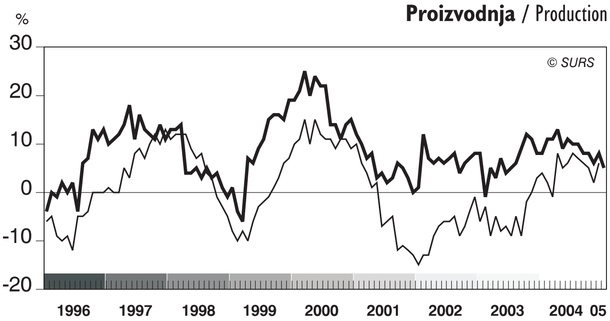
—— originalni podatki / raw data — desezonirani podatki / seasonally adjusted data - - - - dolgoletno povprečje / average

3. GIBANJE EKONOMSKIH KAZALCEV V PREDELOVALNIH DEJAVNOSTIH V SLOVENIJI IN EU, JANUAR 1996 - JANUAR 2005[1]

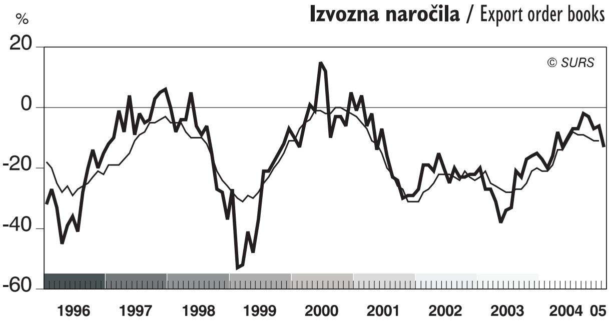
3. EVOLUTION OF ECONOMIC INDICATORS IN MANUFACTURING IN SLOVENIA AND THE EU, JANUARY 1996 - JANUARY 2005[1]

Ocena stanj / Appreciation of situation

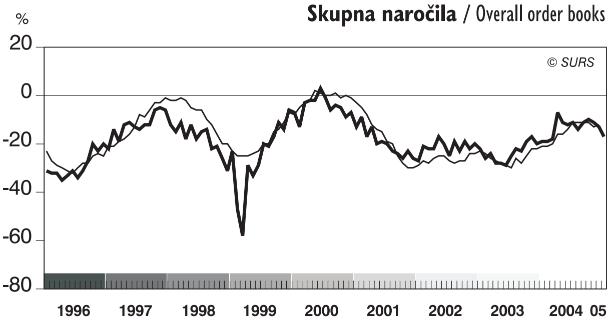
Proizvodnja / Production



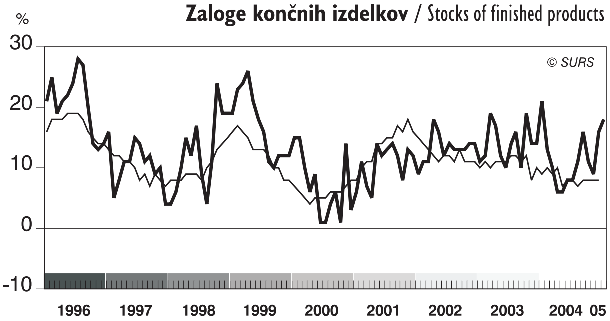
Izvozna naročila / Export order books



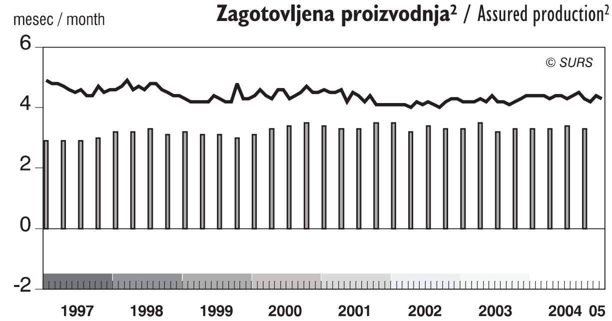
Skupna naročila / Overall order books



Zaloge končnih izdelkov / Stocks of finished products

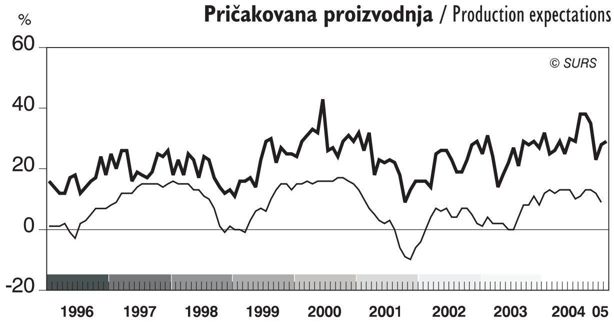


Zagotovljena proizvodnja[2] / Assured production[2]

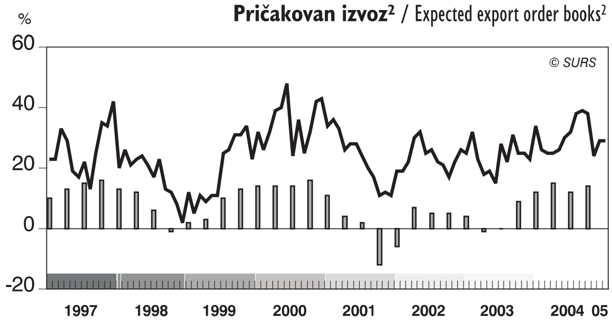


Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months

Pričakovana proizvodnja / Production expectations

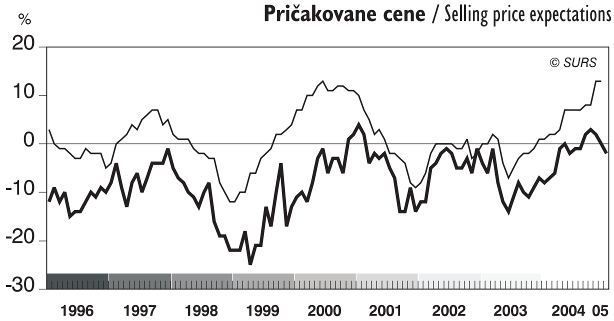


Pričakovan izvoz[2] / Expected export order books[2]

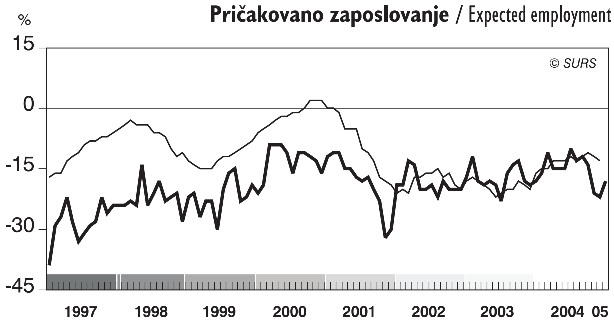


Pričakovano skupno povpraševanje[2] / Expected total demand[2]

Pričakovane cene / Selling price expectations



Pričakovano zaposlovanje / Expected employment



Slovenija / Slovenia — EU

[1] Podatki o EU za zadnji mesec niso na voljo. Podatki so desezoni.. / Data for EU for the last month are not available. Data are seasonally adjusted.

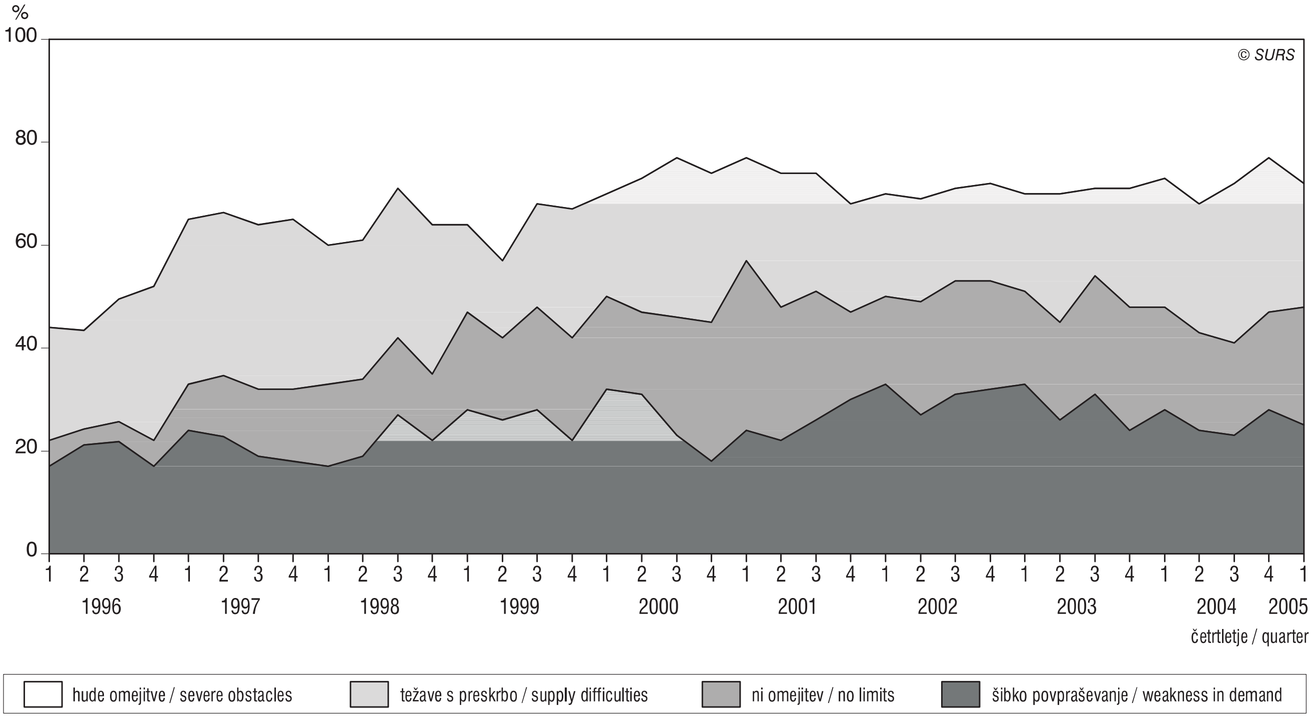
[2] Ekonomski kazalec opazujejo v EU vsake tri mesece. / Indicator in EU is observed every three months.

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

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

4.1 Omejitve v proizvodnji v Sloveniji

4.1 Production obstacles in Slovenia



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

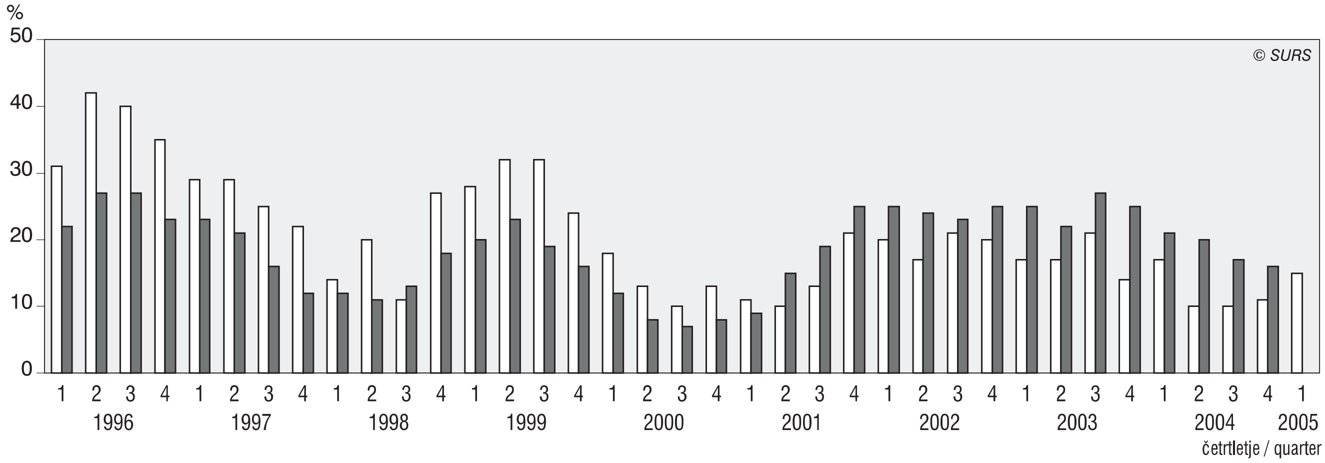
- Skupina **hude omejitve** zajema zaposlene, ki imajo hkrati težave tako z dejavniki iz skupine "šibko povpraševanje" kot tudi z dejavniki iz skupine "težave s preskrbo".
- Skupina **težave s preskrbo** zajema zaposlene, ki imajo probleme s pomanjkanjem delavcev, surovin, polizdelkov, opreme in/ali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

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

- 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".
- 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 legislation, uncertain economic conditions.
- Group **no limits** includes employees with no limits to production.
- Group **weakness in demand** includes employees who are facing insufficient domestic and foreign demand and competitive imports.

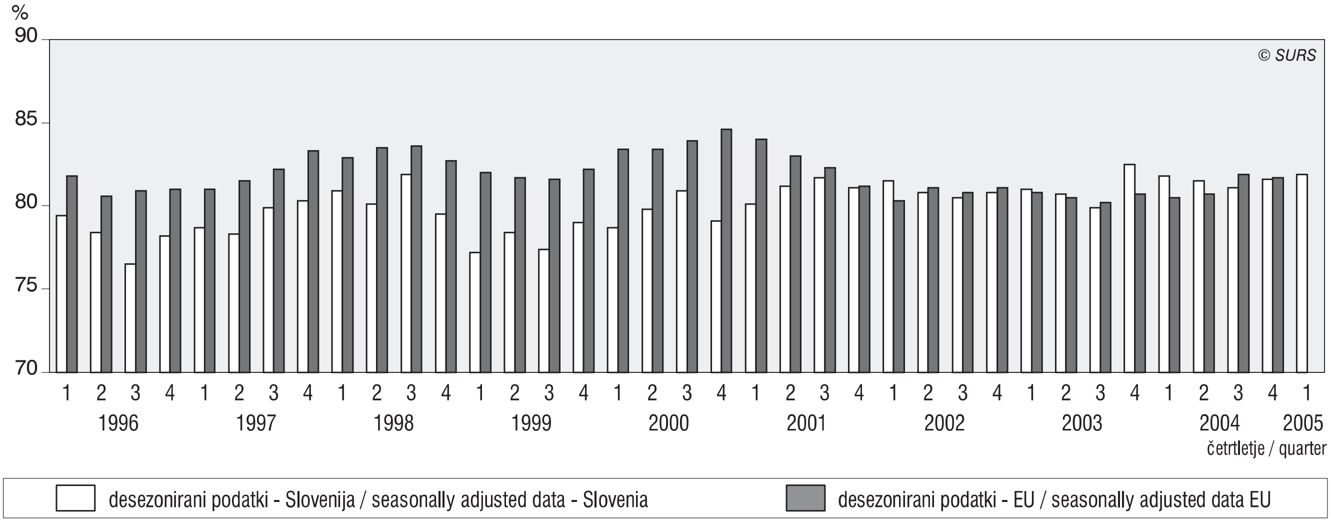
4.2 Ustreznost proizvodnih zmogljivosti glede na pričakovano povpraševanje v naslednjih 12 mesecih, Slovenija in EU

4.2 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]

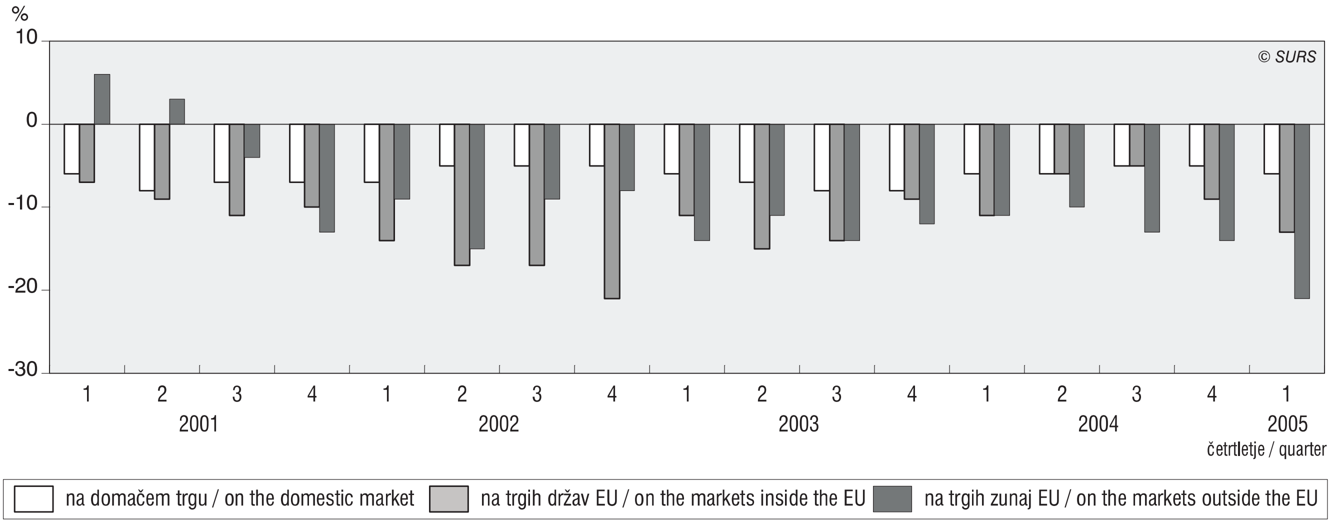
4.3 Current capacity utilisation in Slovenia and EU[1]



[1] Prikazana je povprečna stopnja izkoriščenosti proizvodnih zmogljivosti (tehnično-tehnoloških, človeških itd.). / The chart shows the average of capacity utilisation (technology, human resources, etc.).

4.4 Konkurenčni položaj na domačem trgu, trgih držav članic EU in trgih zunaj EU, Slovenija[2]

4.4 Competitive position on the domestic market, on the markets inside the EU and outside the EU, Slovenia[2]



[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, 56 % srednjevelikih (ali 59 % zaposlenih) in 18 % malih podjetij (ali 20 % zaposlenih). Panelni vzorec pokriva 37 % podjetij vzorčnega okvira ali 74 % 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 giba med 3-15 % (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 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 metodo TRAMO/SEATS, ki temelji na ARIMA modelih. Pri oblikovanju modelov je

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

Persons responding to the monthly questionnaire 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 of the current month.

COVERAGE

The panel includes all large enterprises, 56% of medium-sized enterprises (or 59% of employees) and 18% of small enterprises (or 20% of employees); the panel covers 37% of the enterprises of the studied population or 74% of employees in manufacturing.

METHOD OF DATA COLLECTING

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

WEIGHTS FOR RESPONSES

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

NON-RESPONSES

Non-responses are processed every month in accordance with 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 seasonal component, which include trend-cycle component and irregular component. Data for EU are seasonally adjusted by DAINTIES method and for Slovenia by TRAMO/SEATS method, which is based on ARIMA models. The designing upoštevano časovno obdobje od maja 1995 do januarja 2005, pri časovnih vrstah V9R, V10R in V13R od januarja 1997 do januarja 2005, pri časovni vrsti V12 od drugega četrtletja 1995 do prvega četrtletja 2005, pri časovnih vrstah V14, V15 in V16 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 V3R. Pri časovnih vrstah V7R in V11R sezonska komponenta ni prisotna.

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

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/.

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?

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

of the models is based on the time period from May 1995 to January 2005, the series V9R, V10R and V13R from January 1997 to January 2005, the series V12 from the second quarter of 1995 to the first quarter of 2005, and the series V14, V15 and V16 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 only by V3R. In the time series V7R and V11R the seasonal component is not included.

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 products (the latter with inverted sign).

PUBLISHING

Persons participating in the survey get the special information for division in which they are classified and for manufacturing. They get 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 the http://www.stat.si/eng/.

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 overall order books: above normal, normal, below normal?
– Assessment of current stock of finished products: 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 overall order books: for … months?

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?
– 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?

KOMENTAR

Desezonirana vrednost kazalca zaupanja v predelovalnih dejavnostih je bila v januarju 2005 enaka kot decembru 2004 in enaka kot v istem mesecu lani, hkrati pa za 1 odstotno točko nižja od lanskega povprečja.

Na gibanje kazalca zaupanja v tem mesecu so vplivala večja proizvodna pričakovanja in zaloge končnih izdelkov ter znižanje ravni skupnih naročil, vendar se je njihovo gibanje ravno izničilo, tako da je vrednost kazalca zaupanja ostala enaka kot pretekli mesec.

PROIZVODNJA in PROIZVODNA PRIČAKOVANJA

Desezonirana vrednost kazalca proizvodnje se je v primerjavi s preteklim mesecem znižala za 3 odstotne točke. Glede na isti mesec lani je bila nižja za 6 odstotnih točk in 4 odstotne točke pod lanskim povprečjem.

Desezonirana vrednost kazalca proizvodnih pričakovanj za naslednje 3 mesece je bila v primerjavi s preteklim mesecem višja za 1 odstotno točko. V primerjavi z istim mesecem lani je bila nižja za 3 odstotne točke in za 1 odstotno točko nižja od lanskega povprečja.

ZAGOTOVLJENA PROIZVODNJA

Ob januarskem proizvodnem ritmu imajo podjetja zagotovljeno proizvodnjo v povprečju za 4,3 meseca. To je za 0,1 meseca manj kot lani v tem mesecu in za 0,1 meseca pod lanskim povprečjem.

Največ podjetij (19,4 %) ima proizvodnjo zagotovljeno v povprečju za več kot 10 mesecev. Sledijo podjetja (17,0 %), ki imajo proizvodnjo zagotovljeno v povprečju za 2 meseca, in podjetja (16,1 %), ki imajo proizvodnjo zagotovljeno v povprečju za 3 mesece. Za pol meseca ima zagotovljeno proizvodnjo v povprečju 7,7 % podjetij, ob januarskem proizvodnem ritmu pa nima zagotovljene proizvodnje v povprečju 2,0 % podjetij.

OMEJITVE V PROIZVODNJI

Med omejitvenimi dejavniki v proizvodnji so prevladovali dejavniki iz skupine hude omejitve. V tem mesecu se je z njimi spopadalo 28 % zaposlenih (oziroma 29 % podjetij), kar je za 1 odstotno točko več kot lani v tem mesecu in enako lanskemu povprečju.

Sledili so omejitveni dejavniki iz skupine šibko povpraševanje. V tem mesecu se je z njimi srečevalo 25 % zaposlenih (oziroma 31 % podjetij), kar za 3 odstotne točke manj kot isti mesec lani in 1 odstotno točko pod lanskim povprečjem.

Z dejavniki iz skupine težave s preskrbo se je v tem mesecu srečalo 24 % zaposlenih (oziroma 22 % podjetij) v predelovalnih dejavnostih. Glede na isti mesec lani je bil odstotek nižji za 1 odstotno točko in za 4 odstotne točke pod lanskim povprečjem.

23 % zaposlenih (oziroma 31 % podjetij) v tem mesecu ni imelo omejitev v proizvodnji. Glede na isti mesec lani je bil odstotek višji za 3 odstotne točke in 4 odstotne točke nad lanskim povprečjem.

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

- 42 % podjetij (ali 30 % zaposlenih) omejevalo nezadostno domače povpraševanje;
- 37 % podjetij (ali 36 % zaposlenih) omejevalo nezadostno tuje povpraševanje;

COMMENT

In January 2005, the seasonally adjusted value of the confidence indicator in manufacturing was the same as in December 2004 and January 2004, but 1 percentage point below last year's average.

The evolution of the confidence indicator in this month was influenced by the rise of production expectations and stocks of finished products as well as by the fall of overall order books; however, their opposite influence on the confidence indicator caused no change in its value.

PRODUCTION and PRODUCTION EXPECTATIONS

The seasonally adjusted value of the production indicator fell by 3 percentage points compared to the previous month. Compared to January 2004 it was down by 6 percentage points and 4 percentage points below last year's average.

The seasonally adjusted value of production expectations for the next three months rose by 1 percentage point compared to the previous month. Compared to January 2004 it was down by 3 percentage points and compared to last year's average by 1 percentage point.

ASSURED PRODUCTION

With the same production rhythm as in January, production in enterprises is assured on average for the next 4.3 months. This is 0.1 month less than in January last year and 0.1 month below last year's average.

In most enterprises (19.4%) production is assured for more than ten months. They are followed by enterprises whose production is assured for two months (17.0%) and those whose production is assured for three months (16.1%). Should the January production rhythm continue, 7.7% of enterprises have production assured for half a month while 2.0% of enterprises have no assured production.

LIMITS TO PRODUCTION

Among factors limiting production, severe obstacles prevailed. In January 2005, 28% of employees (29% of enterprises) faced these limits, which is 1 percentage point more than in January 2004 and the same as last year's average.

The second most important limits were demand difficulties. In January 2005, 25% of employees (31% of enterprises) faced these limits, which is 3 percentage points less than in January 2004 and 1 percentage point below last year's average.

The third most important limits were supply difficulties. In January 2005, 24% of employees (22% of enterprises) faced these limits, which is 1 percentage point less than in January 2004 and 4 percentage points below last year's average.

In January 2005, 23% of employees (31% of enterprises) faced no limits, which is 3 percentage points more than in January 2004 and 4 percentage points above last year's average.

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

- 42% of enterprises (or 30% of employees) were limited by insufficient domestic demand,
- 37% of enterprises (or 36% of employees) were limited by insufficient foreign demand,

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

- 22 % podjetij (ali 22 % zaposlenih) omejeval konkurenčni uvoz;
- 20 % podjetij (ali 19 % zaposlenih) omejevalo pomanjkanje usposobljenih delavcev;
- 18 % podjetij (ali 23 % zaposlenih) ni imelo proizvodnih omejitev;
- 14 % podjetij (ali 11 % zaposlenih) omejevale neporavnane obveznosti iz poslovanja;
- 13 % podjetij (ali 9 % zaposlenih) omejevali finančni problemi, kot so neugodni pogoji kreditiranja, težave pri pridobivanju kreditov itd.;
- 10 % podjetij (ali 12 % zaposlenih) omejevalo pomanjkanje ustrezne opreme;
- 12 % podjetij (ali 14 % zaposlenih) imelo težave zaradi negotovih gospodarskih razmer;
- 8 % podjetij (ali 10 % zaposlenih) omejevali drugi dejavniki, npr. nelojalna konkurenca, tečajna politika, pomanjkanje zmogljivosti, visoki stroški dela;
- 5 % podjetij (ali 6 % zaposlenih) omejevalo pomanjkanje surovin;
- 5 % podjetij (ali 5 % zaposlenih) omejevala nejasna gospodarska zakonodaja;
- 3 % podjetij (ali 3 % zaposlenih) omejevalo pomanjkanje delavcev na splošno;
- 0 % podjetij (ali 1 % zaposlenih) omejevalo pomanjkanje polizdelkov.

Največja omejitev v proizvodnji ostaja nezadostno domače povpraševanje, sledijo nezadostno tuje povpraševanje, konkurenčni uvoz in pomanjkanje usposobljenih delavcev. Med omejitvenimi dejavniki v tem mesecu najbolj izstopajo nezadostno tuje povpraševanje in negotove gospodarske razmere, s katerima se je srečevalo za 7 oziroma 5 odstotnih točk več podjetij kot oktobra.

Le 18 % podjetij ni imelo omejitev v proizvodnji.

IZKORIŠČENOST ZMOGLJIVOSTI

Januarska povprečna izkoriščenost zmogljivosti je bila 81,9-odstotna ali za 0,3 odstotne točke višja kot oktobra. V primerjavi z istim mesecem lani je bila za 0,1 odstotne točke višja in 0,1 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 nižja za 2 odstotni točki in 3 točke nad povprečjem lanskega leta.

IZVOZ in IZVOZNA PRIČAKOVANJA

Desezonirana vrednost kazalca ravni izvoznih naročil se je v primerjavi s preteklim mesecem znižala za 7 odstotnih točk. V primerjavi z istim mesecem lani je bila višja za 4 odstotne točke in za 3 odstotne točke pod lanskim povprečjem.

Desezonirana vrednost kazalca pričakovanega izvoza za naslednje 3 mesece je bila enaka kot pretekli mesec. V primerjavi z istim mesecem lani je bila višja za 5 odstotnih točk in 2 odstotni točki pod povprečjem lanskega leta.

- 22% of enterprises (or 22% of employees) were limited by competitive imports,
- 20% of enterprises (or 19% of employees) were limited by shortage of skilled labour,
- 18% of enterprises (or 23% of employees) experienced no limits,
- 14% of enterprises (or 11% of employees) were limited by problems with unpaid bills,
- 13% of enterprises (or 9% of employees) were limited by financial problems such as unfavourable credit terms, difficulties in obtaining credits, etc.,
- 10% of enterprises (or 12% of employees) were limited by lack of appropriate equipment,
- 12% of enterprises (or 14% of employees) were limited by uncertain economic conditions,
- 8% of enterprises (or 10% of employees) were limited by other factors such as unfair competition, exchange-rate policy, lack of capacity, high labour costs,
- 5% of enterprises (or 6% of employees) were limited by shortage of raw materials,
- 5% of enterprises (or 5% of employees) were limited by unclear economic legislation,
- 3% of enterprises (or 3% of employees) were limited by shortage of labour in general,
- 0% of enterprises (or 1% of employees) was limited by shortage of semi-finished products.

The most important factor limiting production is still insufficient domestic demand, followed by insufficient foreign demand, competitive imports and shortage of skilled labour. Limits to production that changed the most in January 2005 are insufficient foreign demand and uncertain economic conditions. Compared to October 2004, the number of enterprises that selected these limits rose by 7 and 5 percentage points respectively.

Only 18% of enterprises experienced no limits to production.

CAPACITY UTILISATION

In January the average capacity utilisation was 81.9%, which is 0.3 percentage point higher than in October 2004. Compared to January 2004 it was up by 0.1 percentage point and 0.1 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 October 2004. Compared to January 2004 it was down by 2 percentage points and 3 percentage points above last year's average.

EXPORT ORDER BOOKS and EXPECTED EXPORT ORDER BOOKS

The seasonally adjusted value of the export order books indicator fell by 7 percentage points compared to the previous month. Compared to January 2004 it was up by 4 percentage points and 3 percentage points below last year's average.

The seasonally adjusted value of expected export in the next three months rose by 5 percentage points compared to the previous month. Compared to January 2004 it was up by 5 percentage points and 2 percentage points below last year's average.

SKUPNA NAROČILA in PRIČAKOVANO SKUPNO POVPRAŠEVANJE

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

Desezonirana vrednost kazalca pričakovanega skupnega povpraševanja za naslednje 3 mesece je bila za 1 odstotno točko višja kot pretekli mesec. Glede na isti mesec lani je bila nižja za 2 odstotni točki ter enaka lanskem povprečju.

PRIČAKOVANE CENE

Desezonirana vrednost kazalca cenovnih pričakovanj za naslednje 3 mesece je bila nižja za 2 odstotni točki glede na pretekli mesec. V primerjavi z istim mesecem lani je bila višja za 6 odstotnih točk in enaka povprečju lanskega leta.

ZALOGE

Desezonirana vrednost kazalca ravni zalog končnih izdelkov je bila višja za 2 odstotni točki glede na pretekli mesec. Glede na isti mesec lani je bila nižja za 3 odstotne točke in 7 odstotnih točk nad povprečjem lanskega leta.

PRIČAKOVANO ZAPOSLOVANJE

Vrednost kazalca pričakovanega zaposlovanja v naslednjih 3 mesecih je bila višja za 4 odstotne točke glede na pretekli mesec. Bila je enaka kot v istem mesecu lani in za 3 odstotne točke pod povprečjem lanskega leta.

KONKURENČNI POLOŽAJ

Desezonirana ocena konkurenčnega položaja podjetij na domačem trgu se je v primerjavi z oktobrom zvišala za 1 odstotno točko. Bila je enaka kot isti mesec lani in lansko povprečje.

Desezonirana ocena konkurenčnega položaja podjetij na trgih držav članic Evropske unije je bila v primerjavi z oktobrom nižja za 4 odstotne točke. Glede na isti mesec lani je bila nižja za 2 odstotni točki, za 5 odstotnih točk pa je presegla lanskoletno povprečje.

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OVERALL ORDER BOOKS and EXPECTED TOTAL DEMAND

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

The seasonally adjusted value of expected total demand for the next three months rose by 1 percentage point compared to the previous month. Compared to January 2004 it was down by 2 percentage points and the same as last year’s average.

SELLING PRICE EXPECTATIONS

The seasonally adjusted value of selling price expectations for the next three months fell by 2 percentage points compared to the previous month. Compared to January 2004 it was up by 6 percentage points and the same as last year’s average.

STOCKS OF FINISHED PRODUCTS

The seasonally adjusted value of the stocks of finished products indicator rose by 2 percentage points compared to the previous month. Compared to January 2004 it was down by 3 percentage points and compared to last year’s average up by 7 percentage points.

EXPECTED EMPLOYMENT

The value of expected employment for the next three months rose by 4 percentage points compared to the previous month. It was the same as in January 2004 and down by 3 percentage points compared to last year’s average.

COMPETITIVE POSITION

Compared to October 2004, the seasonally adjusted assessment of competitive position on the domestic market was up by 1 percentage point. It was the same as in January 2004 and as last year’s average.

Compared to October 2004, the seasonally adjusted assessment of enterprise’s competitive position on markets of EU Member States was down by 4 percentage points. Compared to January 2004 it was down by 2 percentage points and 5 percentage points above last year’s average.

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