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št./No **321**

17 RUDARSTVO IN PREDELOVALNE DEJAVNOSTI
MINING AND MANUFACTURING

št./No **21**

POSLOVNE TENDENCE V PREDELOVALNIH DEJAVNOSTIH, SLOVENIJA, JANUAR 1996 - OKTOBER 2004
BUSINESS TENDENCY IN MANUFACTURING, SLOVENIA, JANUARY 1996 - OCTOBER 2004

► Oktobra so direktorji tendence v predelovalnih dejavnostih ocenili enako kot pretekli mesec – desezonirana vrednost kazalca zaupanja je bila v oktobru enaka kot v septembru. V primerjavi z istim mesecem lani je bila ta vrednost za 8 odstotnih točk višja ter za 9 odstotnih točk nad lanskim povprečjem.

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

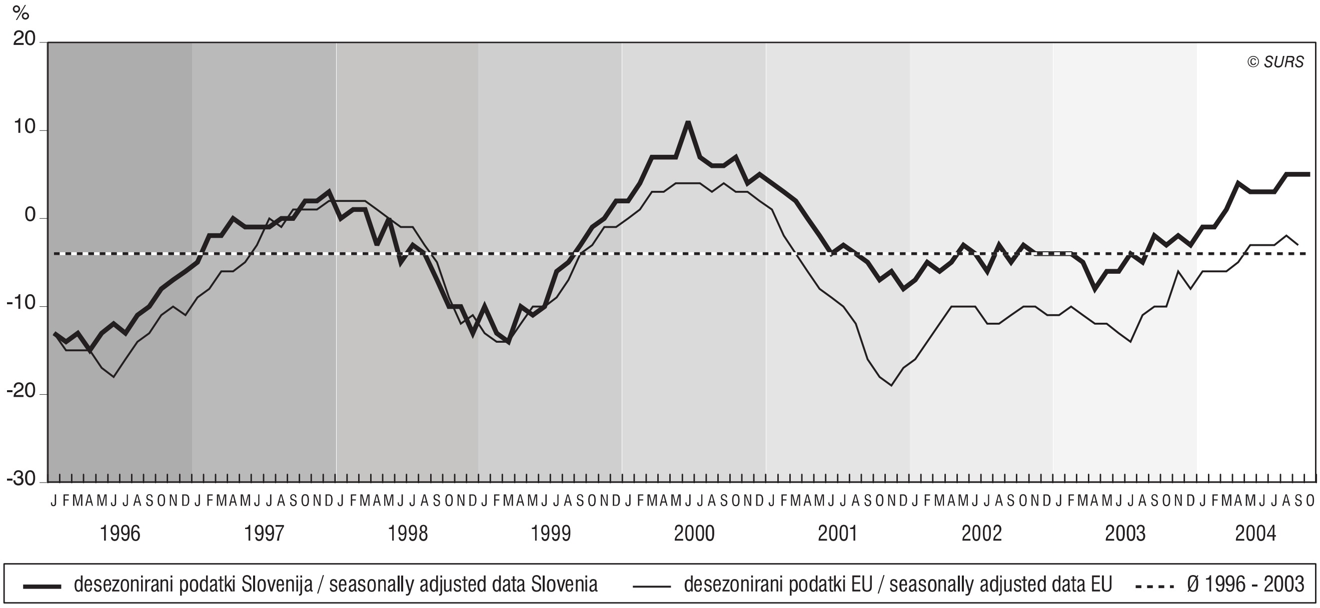
► Kazalci stanj so se v primerjavi s preteklim mesecem večinoma poslabšali. Pričakovanja za naslednje tri mesece, če izvzamemo pričakovano skupno povpraševanje in pričakovane cene, niso ugodna.

► In October managers estimated business tendencies in manufacturing the same as in the previous month. The seasonally adjusted value of the confidence indicator was the same as in September 2004. Compared to October 2003 it was up by 8 percentage points and 9 percentage points above last year's average.

► The evolution of the confidence indicator in this month was influenced by the fall of stocks of finished products and production expectations as well as by the rise 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 not favourable, except for expected total demand and expected prices.

I. KAZALEC ZAUPANJA[1] V SLOVENIJI IN EU[2], JANUAR 1996 - OKTOBER 2004
I. CONFIDENCE INDICATOR[1] IN SLOVENIA AND EU[2], JANUARY 1996 - OCTOBER 2004

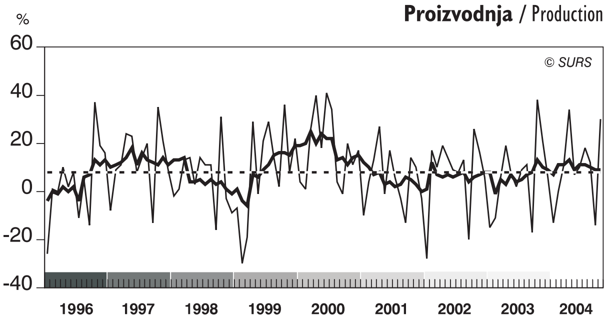


2. GIBANJE EKONOMSKIH KAZALCEV V PREDELOVALNIH DEJAVNOSTIH V SLOVENIJI, JANUAR 1996 - OKTOBER 2004

2. EVOLUTION OF ECONOMIC INDICATORS IN MANUFACTURING IN SLOVENIA, JANUARY 1996 - OCTOBER 2004

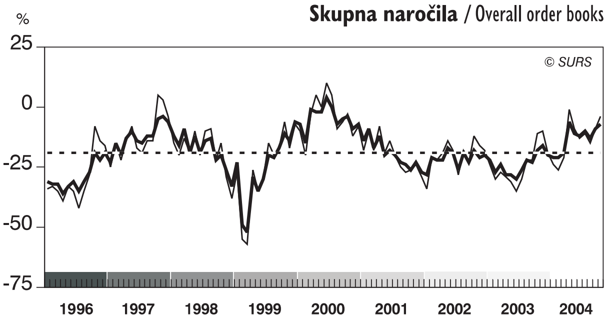
Ocena stanj / Appreciation of situation

Proizvodnja / Production

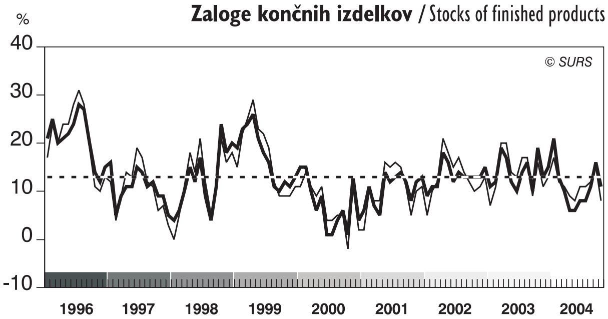


Izvozna naročila / Export order books

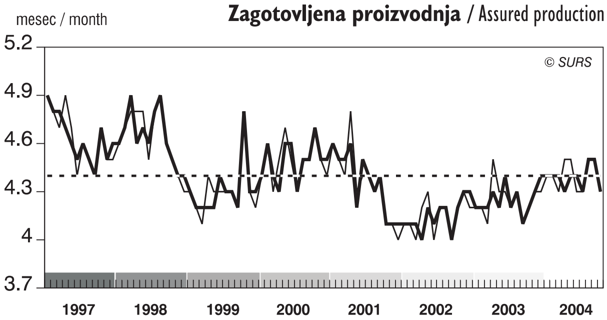
Skupna naročila / Overall order books



Zaloge končnih izdelkov / Stocks of finished products

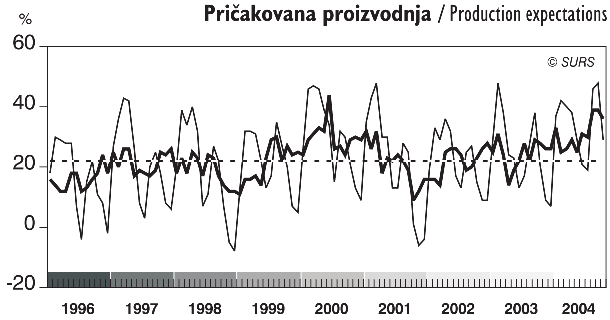


Zagotovljena proizvodnja / Assured production

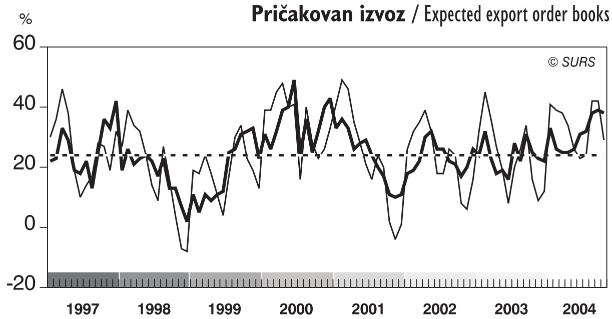


Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months

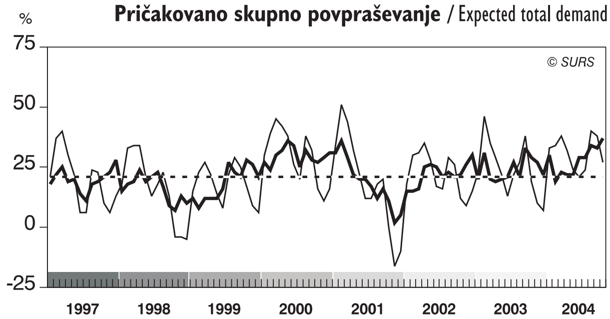
Pričakovana proizvodnja / Production expectations



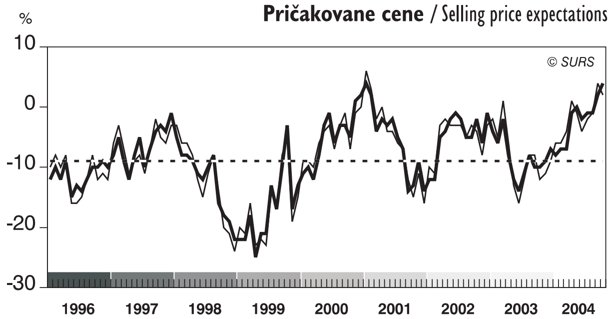
Pričakovan izvoz / Expected export order books



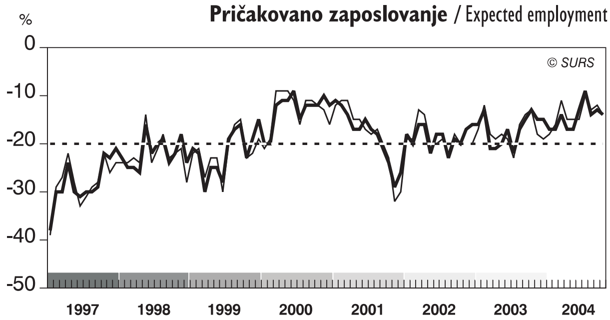
Pričakovano skupno povpraševanje / Expected total demand



Pričakovane cene / Selling price expectations



Pričakovano zaposlovanje / Expected employment



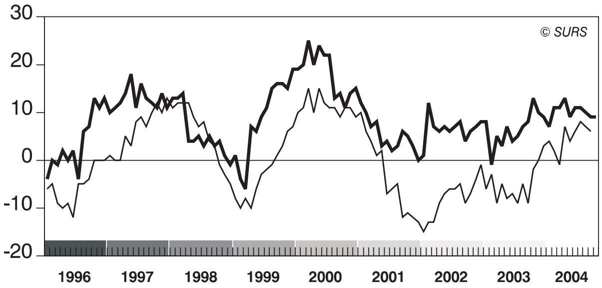
—— originalni podatki / raw data   ▬ desezonirani podatki / seasonally adjusted data   - - - - dolgoletno povprečje / average

3. GIBANJE EKONOMSKIH KAZALCEV V PREDELOVALNIH DEJAVNOSTIH V SLOVENIJI IN EU, JANUAR 1996 - OKTOBER 2004[1]

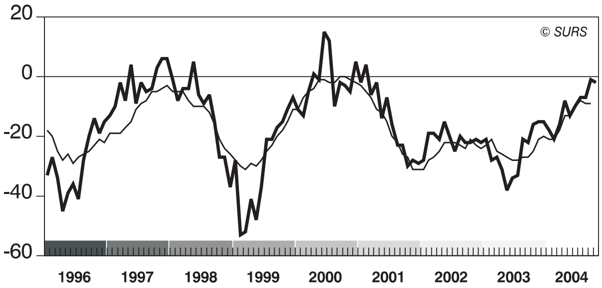
3. EVOLUTION OF ECONOMIC INDICATORS IN MANUFACTURING IN SLOVENIA AND THE EU, JANUARY 1996 - OCTOBER 2004[1]

Ocena stanj / Appreciation of situation

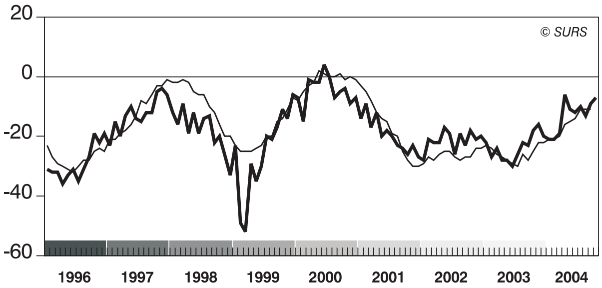
Proizvodnja / Production



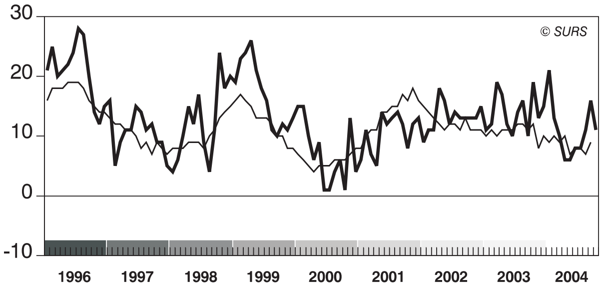
Izvozna naročila / Export order books



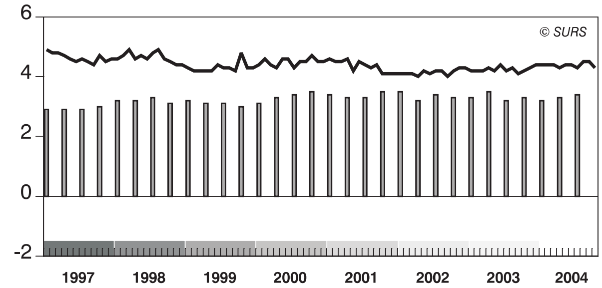
Skupna naročila / Overall order books



Zaloge končnih izdelkov / Stocks of finished products

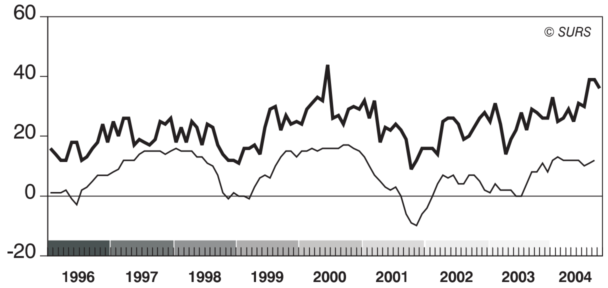


Zagotovljena proizvodnja[2] / Assured production[2]

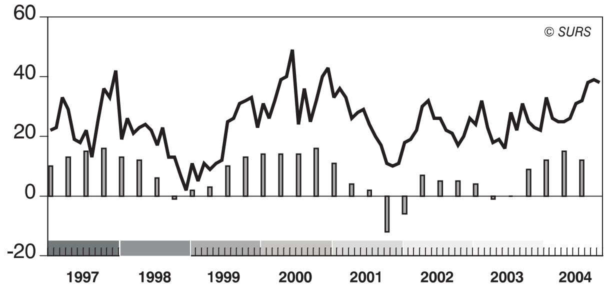


Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months

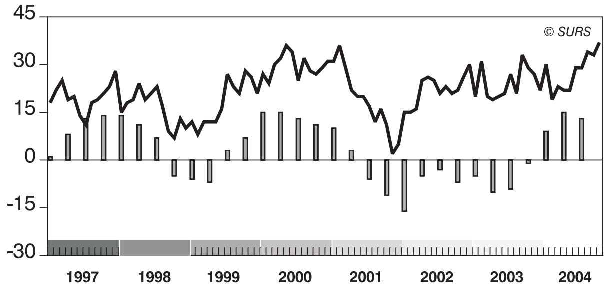
Pričakovana proizvodnja / Production expectations



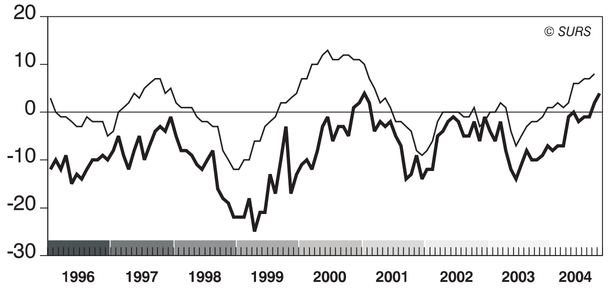
Pričakovan izvoz[2] / Expected export order books[2]



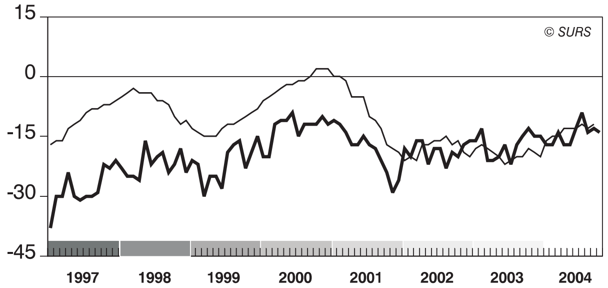
Pričakovano skupno povpraševanje[2] / Expected total demand[2]



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.

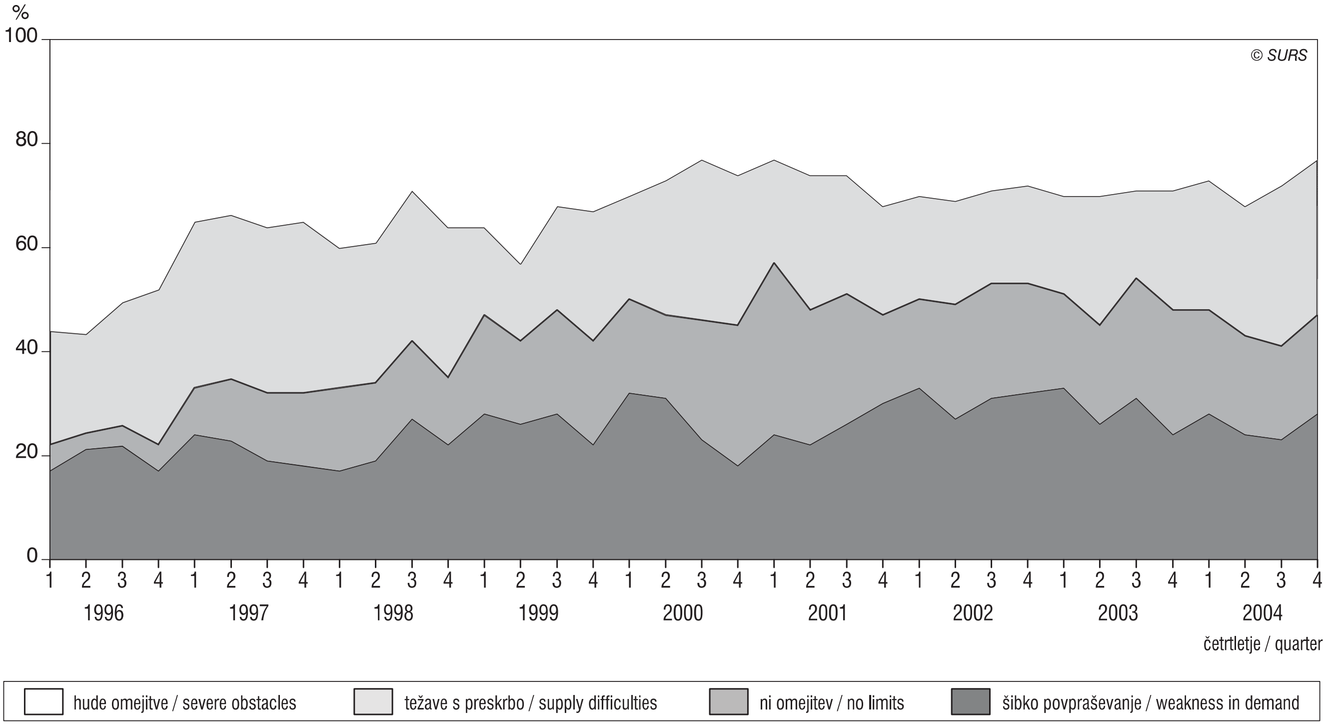
[2] Ekonomski kazalec opazujejo v EU vsake tri mesece. / Indicator in EU is observed every three months.

4. GIBANJE EKONOMSKIH KAZALCEV V PREDELOVALNIH DEJAVNOSTIH V SLOVENIJI IN EU, I. ČETRTLETJE 1996 - 4. ČETRTLETJE 2004 - ČETRTLETNI PODATKI

4. EVOLUTION OF ECONOMIC INDICATORS IN MANUFACTURING IN SLOVENIA AND EU, 1st QUARTER 1996 - 4th QUARTER 2004 - 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:

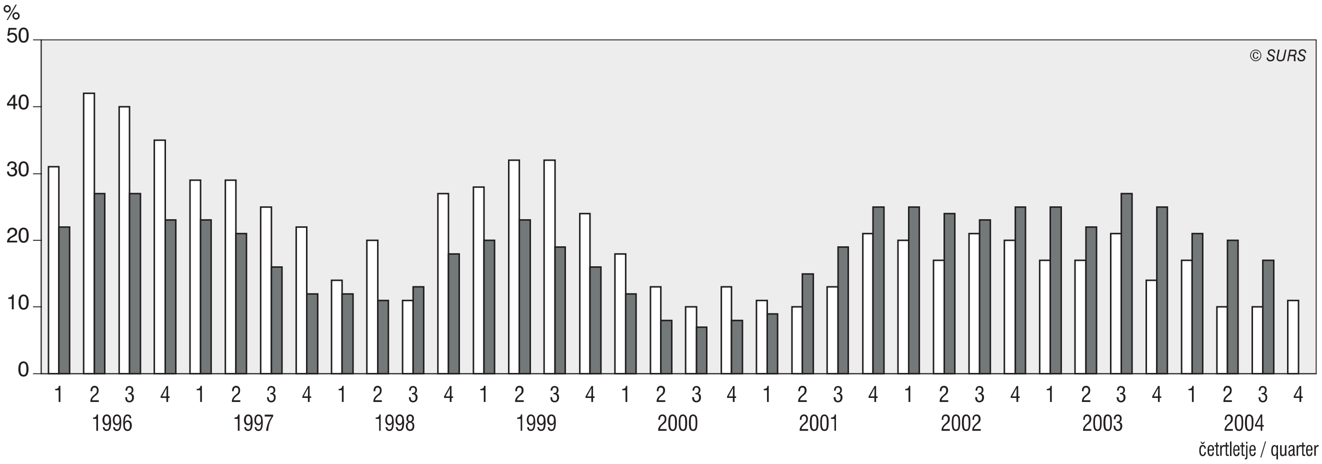
- Skupina **hude omejitve** zajema zaposlene, ki imajo hkrati težave tako z dejavniki iz skupine "šibko povpraševanje" kot tudi z dejavniki iz skupine "težave s preskrbo".
- Skupina **težave s preskrbo** zajema zaposlene, ki imajo probleme s pomanjkanjem delavcev, surovin, polizdelkov, opreme in/ali 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.

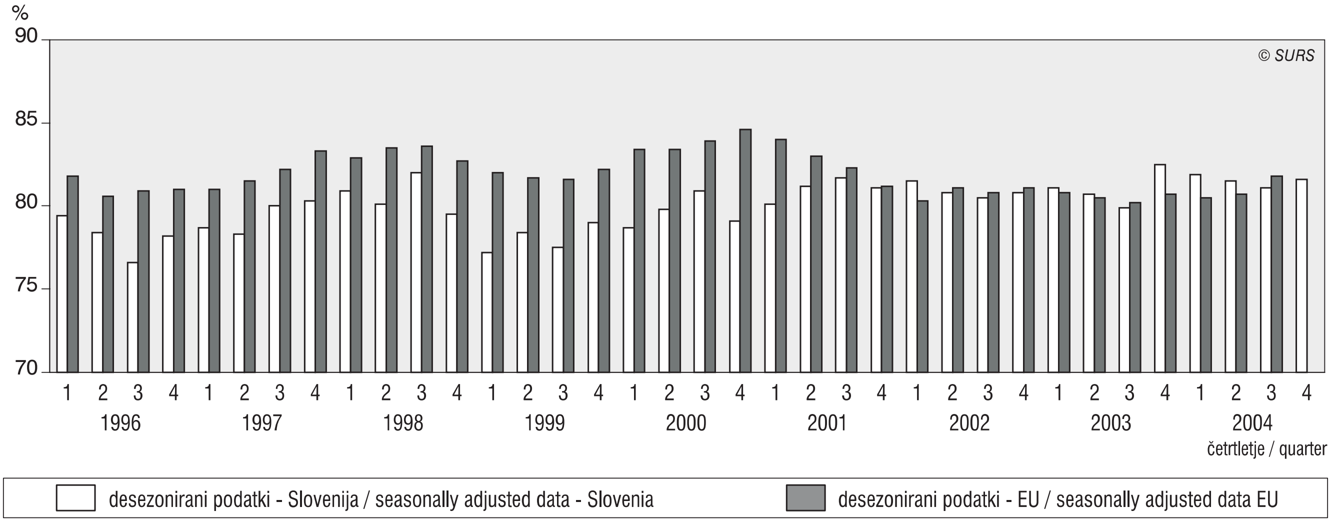
4.2 Ustreznost proizvodnih zmogljivosti glede na pričakovano povpraševanje v naslednjih 12 mesecih, Slovenija in EU

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]

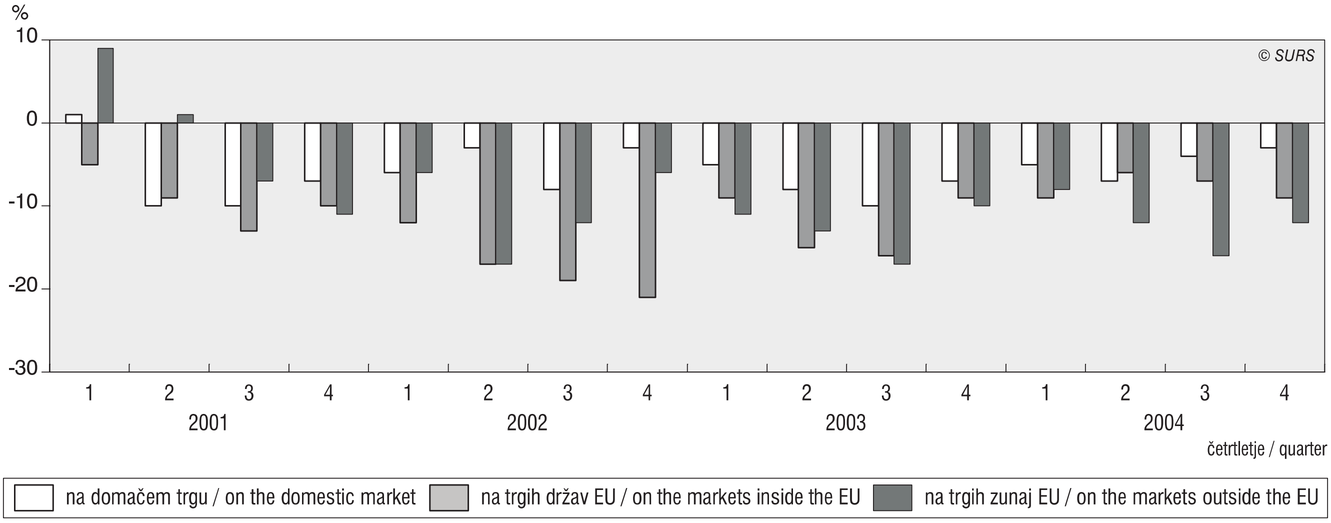
4.3 Current capacity utilisation in Slovenia and EU[1]



[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 niso desezonirani. / Data are not 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 vas 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.

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.

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 upoštevano časovno obdobje od marca 1995 do januarja 2004. Zaradi narave podatkov se modeli za leto 2004 razlikujejo v primerjavi z modeli za leto 2003 le pri kazalcu zaupanja. Zaradi narave podatkov časovna vrsta Ustreznost proizvodnih zmogljivosti ni desezonirana, saj 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?

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 of the models is based on the time period from March 1995 till January 2004. Because of the nature of data, models for 2004 differ from those used in 2003 only by confidence indicator. Because of the nature of data the series Current production capacity is not seasonally adjusted, because of absence of seasonal component.

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

Oktobra so direktorji tendence v predelovalnih dejavnostih ocenili enako kot pretekli mesec – desezonirana vrednost kazalca zaupanja je bila v oktobru enaka kot v septembru. V primerjavi z istim mesecem lani je bila ta vrednost za 8 odstotnih točk višja ter za 9 odstotnih točk nad lanskim povprečjem.

Na gibanje kazalca zaupanja v tem mesecu so vplivale manjše zaloge končnih izdelkov in manjša proizvodna pričakovanja ter zvišanje 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 je bila enaka kot pretekli mesec. Glede na isti mesec lani je bila nižja za 8 odstotnih točk, glede na lansko povprečje pa višja za 2 odstotni točki.

Desezonirana vrednost kazalca proizvodnih pričakovanj za naslednje 3 mesece se je znižala za 3 odstotne točke. V primerjavi z istim mesecem lani je bila višja za 8 odstotnih točk in za 11 odstotnih točk višja od lanskega povprečja.

ZAGOTOVLJENA PROIZVODNJA

Ob oktoberskem proizvodnem ritmu imajo podjetja zagotovljeno proizvodnjo v povprečju za 4,3 meseca. To je za 0,1 meseca več kot lani v tem mesecu in enako kot lansko povprečje.

Največ podjetij (22,3 %) ima proizvodnjo zagotovljeno v povprečju za 3 mesece. Sledijo podjetja (18,4 %), ki imajo proizvodnjo zagotovljeno v povprečju za več kot 10 mesecev, in podjetja (16,5 %), ki imajo proizvodnjo zagotovljeno v povprečju za 2 meseca. Za en mesec ima zagotovljeno proizvodnjo v povprečju 12,1 % podjetij, ob oktoberskem proizvodnem ritmu pa nima zagotovljene proizvodnje v povprečju 2,1 % podjetij.

OMEJITVE V PROIZVODNJI

Med omejitvenimi dejavniki v proizvodnji so prevladovali dejavniki iz skupine težave s preskrbo. V tem mesecu se je z njimi spopadalo 30 % zaposlenih (oziroma 32 % podjetij), kar je za 7 odstotnih točk več kot lani v tem mesecu in 9 odstotnih točk nad lanskim povprečjem.

Sledili so omejitveni dejavniki iz skupine šibko povpraševanje. V tem mesecu se je z njimi srečevalo 28 % zaposlenih (oziroma 31 % podjetij), kar za 4 odstotne točke več kot isti mesec lani in 1 odstotno točko pod lanskim povprečjem.

Z dejavniki iz skupine hude omejitve se je v tem mesecu srečalo 23 % zaposlenih (oziroma 20 % podjetij) v predelovalnih dejavnostih. Glede na isti mesec lani je bil odstotek nižji za 6 odstotnih točk in za 7 odstotnih točk pod lanskim povprečjem.

19 % zaposlenih (oziroma 17 % podjetij) v tem mesecu ni imelo omejitev v proizvodnji. Glede na isti mesec lani je bil odstotek nižji za 5 odstotnih točk in 2 odstotne točke pod lanskim povprečjem.

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

- 37 % podjetij (ali 31 % zaposlenih) omejevalo nezadostno domače povpraševanje;

COMMENT

In October managers estimated business tendencies in manufacturing the same as in the previous month. The seasonally adjusted value of the confidence indicator was the same as in September 2004. Compared to October 2003 it was up by 8 percentage points and 9 percentage points above last year's average.

The evolution of the confidence indicator in this month was influenced by the fall of stocks of finished products and production expectations as well as by the rise 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 remained the same as in the previous month. Compared to October 2003 it was down by 8 percentage points and up by 2 percentage points compared to last year's average.

The seasonally adjusted value of production expectations for the next three months fell by 3 percentage points. Compared to October 2003 it was up by 8 percentage points and compared to last year's average by 11 percentage points.

ASSURED PRODUCTION

With the same production rhythm as in October, production in enterprises is assured on average for the next 4.3 months. This is 0.1 month more than in October 2003 and the same as last year's average.

In most enterprises (22.3%) production is assured for three months. They are followed by enterprises whose production is assured for more than ten months (18.4%) and those in which production is assured for two months (16.5%). Should the October production rhythm continue, 12.1% of enterprises have production assured for one month and 2.1% of enterprises have no assured production.

LIMITS TO PRODUCTION

Among factors limiting production, supply difficulties prevailed. In October 2004, 30% of employees (32% of enterprises) faced these limits, which is 7 percentage points more than in October 2003 and 9 percentage points above last year's average.

The second most important limits were demand difficulties. In October 2004, 28% of employees (31% of enterprises) faced these limits, which is 4 percentage points more than in October 2003 and 1 percentage point below last year's average.

The third most important limits were severe obstacles. In October 2004, 23% of employees (20% of enterprises) faced these limits, which is 6 percentage points less than in October 2003 and 7 percentage points below last year's average.

In October 2004, 19% of employees (17% of enterprises) faced no limits, which is 5 percentage points less than in October 2003 and 2 percentage points below last year's average.

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

- 37% of enterprises (or 31% of employees) were limited by insufficient domestic demand,

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%.

- 30 % podjetij (ali 33 % zaposlenih) omejevalo nezadostno tuje povpraševanje;
- 19 % podjetij (ali 19 % zaposlenih) omejeval konkurenčni uvoz;
- 19 % podjetij (ali 18 % zaposlenih) omejevalo pomanjkanje usposobljenih delavcev;
- 17 % podjetij (ali 19 % zaposlenih) ni imelo proizvodnih omejitev;
- 17 % podjetij (ali 12 % zaposlenih) omejevale neporavnane obveznosti iz poslovanja;
- 10 % podjetij (ali 12 % zaposlenih) omejevalo pomanjkanje ustrezne opreme;
- 10 % podjetij (ali 6 % zaposlenih) omejevali finančni problemi, kot so neugodni pogoji kreditiranja, težave pri pridobivanju kreditov itd.;
- 8 % podjetij (ali 11 % zaposlenih) omejevali drugi dejavniki, npr. nelojalna konkurenca, tečajna politika, pomanjkanje zmogljivosti, visoki stroški dela;
- 7 % podjetij (ali 12 % zaposlenih) imelo težave zaradi negotovih gospodarskih razmer;
- 7 % podjetij (ali 7 % zaposlenih) omejevalo pomanjkanje surovin;
- 7 % podjetij (ali 5 % zaposlenih) omejevalo pomanjkanje delavcev na splošno;
- 4 % podjetij (ali 4 % zaposlenih) omejevala nejasna gospodarska zakonodaja;
- 1 % podjetij (ali 2 % 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 pomanjkanje usposobljenih delavcev in konkurenčni uvoz, s katerima se je srečevalo za 6 oziroma 4 odstotne točke manj podjetij kot julija.

Le 17 % podjetij ni imelo omejitev v proizvodnji.

IZKORIŠČENOST ZMOGLJIVOSTI

Oktoberska povprečna izkoriščenost zmogljivosti je bila 81,6-odstotna ali za 0,5 odstotne točke višja kot julija. V primerjavi z istim mesecem lani je bila za 0,9 odstotne točke nižja in 0,5 odstotne točke nad 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 3 odstotne točke in 6 točk pod povprečjem lanskega leta.

IZVOZ in IZVOZNA PRIČAKOVANJA

Desezonirana vrednost kazalca ravni izvoznih naročil se je v primerjavi s preteklim mesecem znižala za 1 odstotno točko. V primerjavi z istim mesecem lani je bila višja za 14 odstotnih točk in za 23 odstotnih točk nad lanskim povprečjem.

- 30% of enterprises (or 33% of employees) were limited by insufficient foreign demand,
- 19% of enterprises (or 19% of employees) were limited by competitive imports,
- 19% of enterprises (or 18% of employees) were limited by shortage of skilled labour,
- 17% of enterprises (or 19% of employees) experienced no limits,
- 17% of enterprises (or 12% of employees) were limited by problems with unpaid bills,
- 10% of enterprises (or 12% of employees) were limited by lack of appropriate equipment,
- 10% of enterprises (or 6% of employees) were limited by financial problems such as unfavourable credit terms, difficulties in obtaining credits, etc.,
- 8% of enterprises (or 11% of employees) were limited by other factors such as unfair competition, exchange-rate policy, lack of capacity, high labour costs,
- 7% of enterprises (or 12% of employees) were limited by uncertain economic conditions,
- 7% of enterprises (or 7% of employees) were limited by shortage of raw materials,
- 7% of enterprises (or 5% of employees) were limited by shortage of labour in general,
- 4% of enterprises (or 4% of employees) were limited by unclear economic legislation,
- 1% of enterprises (or 2% 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 October 2004 are shortage of skilled labour and competitive imports. Compared to July 2004, the number of enterprises that selected these limits fell by 6 and 4 percentage points respectively.

Only 17% of enterprises experienced no limits to production.

CAPACITY UTILISATION

In October the average capacity utilisation was 81.6%, which is 0.5 percentage point higher than in July 2004. Compared to October 2003 it was down by 0.9 percentage point and 0.5 percentage point above 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 July 2004. Compared to October 2003 it was down by 3 percentage points and 6 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 fell by 1 percentage point compared to the previous month. Compared to October 2003 it was up by 14 percentage points and compared to last year’s average by 23 percentage points.

Desezonirana vrednost kazalca pričakovanega izvoza za naslednje 3 mesece se je v primerjavi s preteklim mesecem znižala za 1 odstotno točko. V primerjavi z istim mesecem lani je bila višja za 13 odstotnih točk in za 14 odstotnih točk višja kot lanskoletno povprečje.

The seasonally adjusted value of expected export in the next three months fell by 1 percentage point compared to the previous month. Compared to October 2003 it was up by 13 percentage points and compared to last year's average by 14 percentage points.

SKUPNA NAROČILA in PRIČAKOVANO SKUPNO POVPRAŠEVANJE

Desezonirana vrednost kazalca ravni skupnih naročil se je v primerjavi s preteklim mesecem zvišala za 2 odstotni točki. Glede na isti mesec lani je bila višja za 7 odstotnih točk in za 17 odstotnih točk nad povprečjem lanskega leta.

Desezonirana vrednost kazalca pričakovanega skupnega povpraševanja za naslednje 3 mesece se je v primerjavi s preteklim mesecem zvišala za 4 odstotne točke. Glede na isti mesec lani je bila višja za 8 odstotnih točk, za 13 odstotnih točk pa je bila višja od lanskega povprečja.

OVERALL ORDER BOOKS and EXPECTED TOTAL DEMAND

The seasonally adjusted value of the overall order books indicator rose by 2 percentage points compared to the previous month. Compared to October 2003 it was up by 7 percentage points and compared to last year's average by 17 percentage points.

The seasonally adjusted value of expected total demand for the next three months rose by 4 percentage points compared to the previous month. Compared to October 2003 it was up by 8 percentage points and compared to last year's average by 13 percentage points.

PRIČAKOVANE CENE

Desezonirana vrednost kazalca cenovnih pričakovanj za naslednje 3 mesece se je v primerjavi s preteklim mesecem zvišala za 2 odstotni točki. V primerjavi z istim mesecem lani je bila višja za 14 odstotnih točk in 12 točk nad lanskim povprečjem.

SELLING PRICE EXPECTATIONS

The seasonally adjusted value of selling price expectations for the next three months rose by 2 percentage points compared to the previous month. Compared to October 2003 it was up by 14 percentage points and compared to last year's average by 12 percentage points.

ZALOGE

Desezonirana vrednost kazalca ravni zalog končnih izdelkov se je v primerjavi s preteklim mesecem znižala za 5 odstotnih točk. Glede na isti mesec lani je bila nižja za 8 odstotnih točk, za 3 odstotne točke pa je bila pod povprečjem lanskega leta.

STOCKS OF FINISHED PRODUCTS

The seasonally adjusted value of the stocks of finished products indicator fell by 5 percentage points compared to the previous month. Compared to October 2003 it was down by 8 percentage points and compared to last year's average by 3 percentage points.

PRIČAKOVANO ZAPOSLOVANJE

Desezonirana vrednost kazalca pričakovanj glede zaposlovanja v naslednjih 3 mesecih se je glede na pretekli mesec znižala za 1 odstotno točko. V primerjavi z istim mesecem lani je bila nižja za 1 odstotno točko in 3 odstotne točke nad povprečjem lanskega leta.

EXPECTED EMPLOYMENT

The seasonally adjusted value of expected employment for the next three months fell by 1 percentage point compared to the previous month. Compared to October 2003 it was down by 1 percentage point, while compared to year's average it was up by 3 percentage points.

KONKURENČNI POLOŽAJ

Ocena konkurenčnega položaja podjetij na domačem trgu se je v primerjavi z julijem zvišala za 1 odstotno točko. V primerjavi z istim mesecem lani je bila višja za 4 odstotne točke in 5 odstotnih točk nad lanskim povprečjem.

Ocena konkurenčnega položaja podjetij na trgih držav članic Evropske unije je bila v primerjavi z julijem nižja za 2 odstotni točki. Bila je enaka kot isti mesec lani, za 3 odstotne točke pa je presegla lanskoletno povprečje.

Ocena konkurenčnega položaja podjetij na trgih zunaj Evropske unije je bila v primerjavi z julijem višja za 4 odstotne točke. Glede na isti mesec lani je bila nižja za 2 odstotni točki in za 1 odstoto točko pod lanskim povprečjem.

COMPETITIVE POSITION

Compared to July 2004, the assessment of competitive position on the domestic market was up by 1 percentage point. Compared to October 2003 it was up by 4 percentage points and 5 percentage points above last year's average.

Compared to July 2004, the assessment of enterprise's competitive position on markets of EU Member States was down by 2 percentage points. It was the same as in October 2003 and 3 percentage points above last year's average.

Compared to July 2004, the assessment of enterprise's competitive position on markets outside the European Union was up by 4 percentage points. Compared to October 2003 it was down by 2 percentage points and 1 percentage point below last year's average.

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