



17 RUDARSTVO IN PREDELOVALNE DEJAVNOSTI MINING AND MANUFACTURING

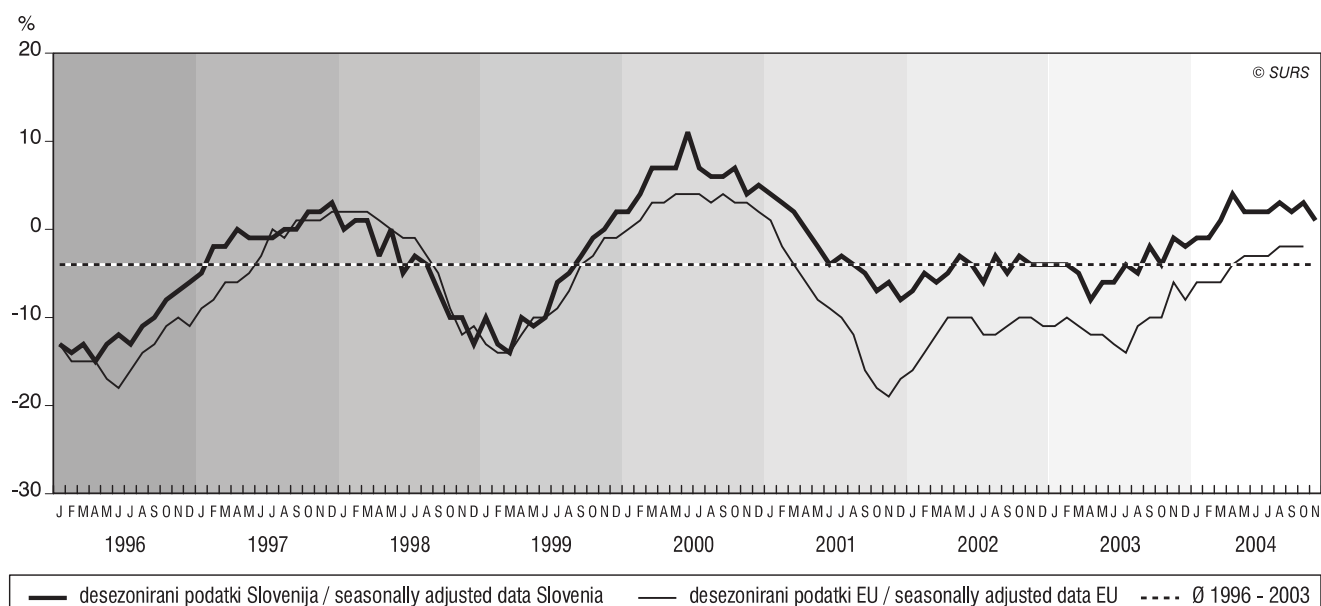
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POSLOVNE TENDENCE V PREDELOVALNIH DEJAVNOSTIH, SLOVENIJA, NOVEMBER 2004 BUSINESS TENDENCY IN MANUFACTURING, SLOVENIA, NOVEMBER 2004

- ▶ Novembra so direktorji tendence v predelovalnih dejavnostih ocenili slabše kot pretekli mesec – desezonirana vrednost kazalca zaupanja je bila v novembru za 2 odstotni točki nižja kot v oktobru. V primerjavi z istim mesecem lani je bila ta vrednost za 1 odstotno točko višja ter za 5 odstotnih točk nad lanskim povprečjem.
- ▶ Na znižanje kazalca zaupanja v tem mesecu sta vplivali nižja raven skupnih naročil in proizvodnih pričakovanj.
- ▶ Kazalci stanj so se v primerjavi s preteklim mesecem večinoma poslabšali. Pričakovanja za naslednje tri mesece niso ugodna.
- ▶ In November, managers estimated business tendencies in manufacturing as being worse than in the previous month. The seasonally adjusted value of the confidence indicator fell by 2 percentage points compared to the previous month. Compared to October 2003 it was up by 1 percentage point and 5 percentage points above last year's average.
- ▶ The decrease of the confidence indicator was influenced by the fall of overall order books and production expectations.
- ▶ Observed indicators for appreciation of the situation deteriorated compared to the previous month. The expectations for the next three months are not favourable.

I. KAZALEC ZAUPANJA¹ V SLOVENIJI IN EU², JANUAR 1996 - NOVEMBER 2004

I. CONFIDENCE INDICATOR¹ IN SLOVENIA AND EU², JANUARY 1996 - NOVEMBER 2004

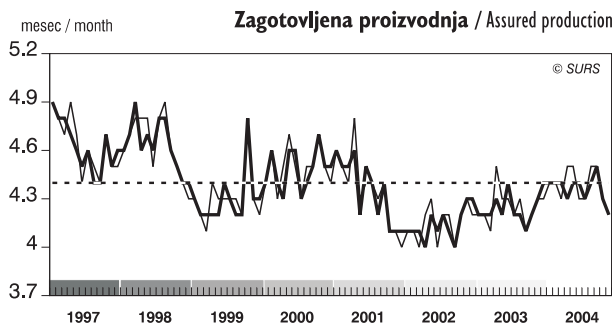
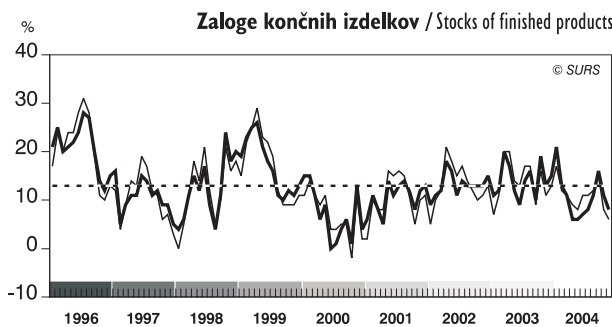
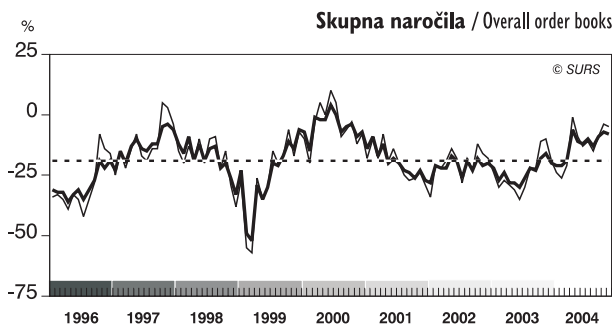
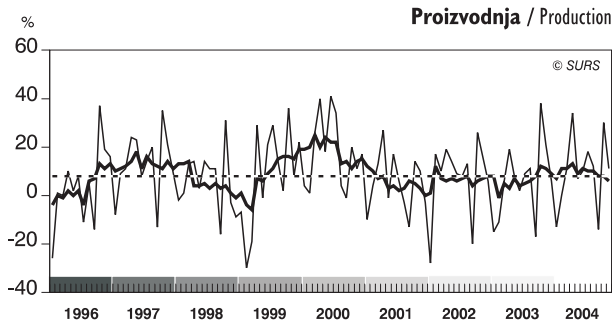
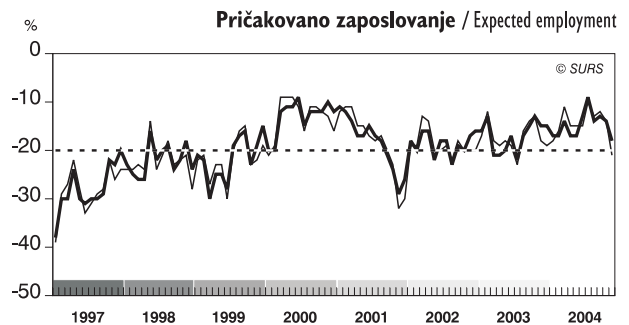
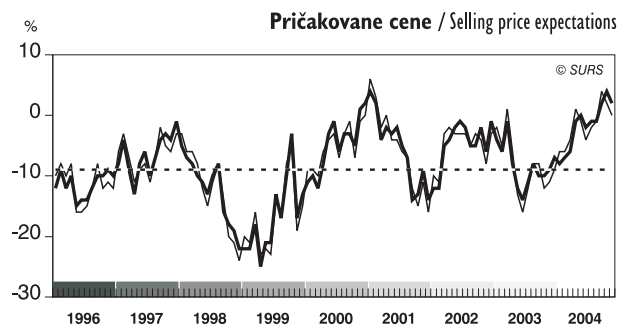
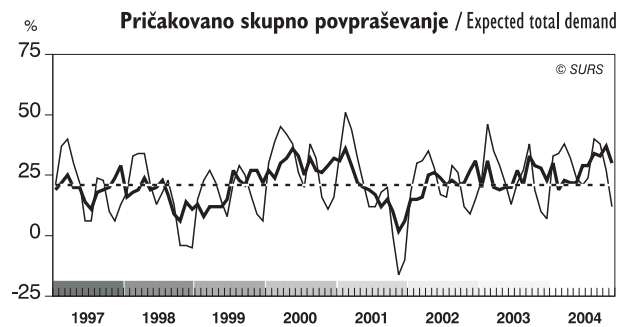
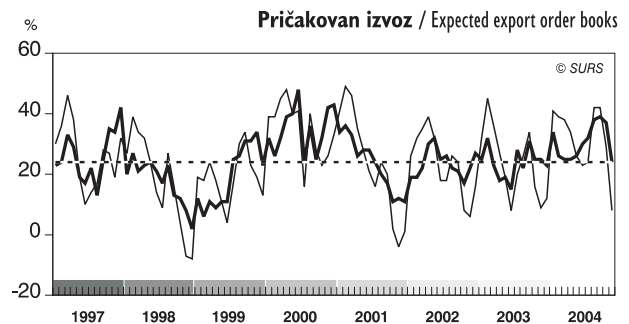
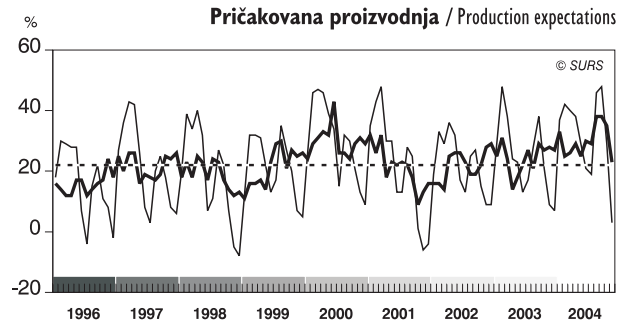


¹ Kazalec zaupanja je povprečje odgovorov (ravnotežij) na vprašanja o proizvodnih pričakovanjih, skupnih naročilih in zalogah končnih izdelkov (obrnjen predznak). Podatki so desezonirani. Confidence indicator is an average of responses (balances) to questions on production expectations, overall order 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 - NOVEMBER 2004

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

Ocena stanja / Appreciation of situation**Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months**

— originalni podatki / raw data

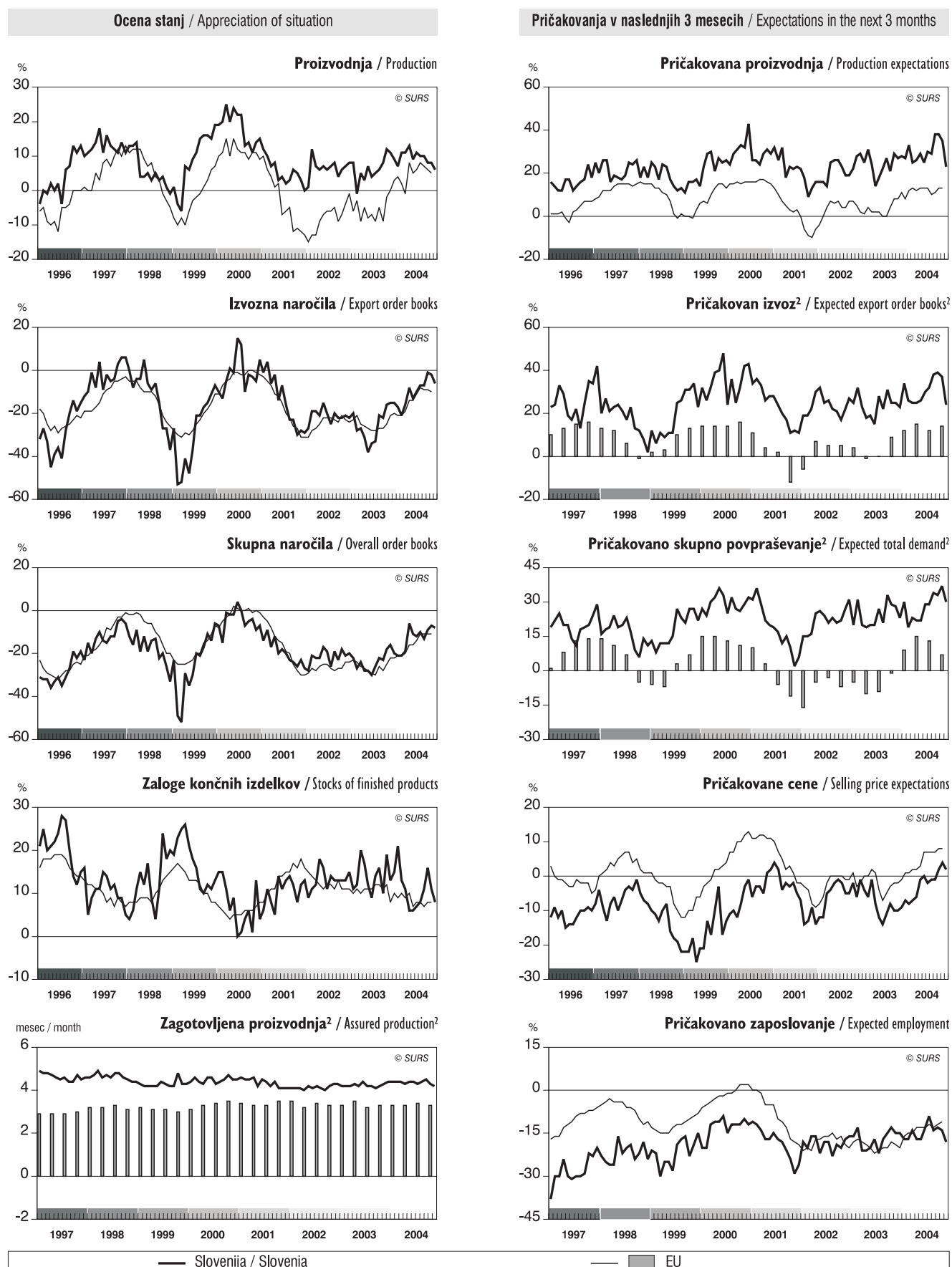
— desezonirani podatki / seasonally adjusted data

- - - dolgoletno povprečje / average



3. GIBANJE EKONOMSKIH KAZALCEV V PREDELOVALNIH DEJAVNOSTIH V SLOVENIJI IN EU, JANUAR 1996 - NOVEMBER 2004¹

3. EVOLUTION OF ECONOMIC INDICATORS IN MANUFACTURING IN SLOVENIA AND THE EU, JANUARY 1996 - NOVEMBER 2004¹



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.



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 četrletje (januar, april, julij in oktober) pa mesečni anketi dodamo še sedem četrletnih 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

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 COLLECTION

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



za EU so desezonirani z metodo DAINITIES, 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?
- Pričakovani 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?

component. Data for EU are seasonally adjusted by DAINITIES 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

Novembra so direktorji tendence v predelovalnih dejavnostih ocenili slabše kot pretekli mesec – desezonirana vrednost kazalca zaupanja je bila v novembru za 2 odstotni točki nižja kot v oktobru. V primerjavi z istim mesecem lani je bila ta vrednost za 1 odstotno točko višja ter za 5 odstotnih točk nad lanskim povprečjem.

Na znižanje kazalca zaupanja v tem mesecu sta vplivali nižja raven skupnih naročil in proizvodnih pričakovanj.

PROIZVODNJA in PROIZVODNA PRIČAKOVANJA

Desezonirana vrednost kazalca proizvodnje se je v primerjavi s preteklim mesecem znižala za 2 odstotni točki. Glede na isti mesec lani je bila nižja za 10 odstotnih točk in enaka lanskemu povprečju.

Desezonirana vrednost kazalca proizvodnih pričakovanj za naslednje 3 mesece je bila v primerjavi s preteklim mesecem nižja za 12 odstotnih točk. V primerjavi z istim mesecem lani je bila nižja za 6 odstotnih točk in za 1 odstotno točko nižja od lanskega povprečja.

ZAGOTOVLJENA PROIZVODNJA

Ob novembrskem proizvodnem ritmu imajo podjetja zagotovljeno proizvodnjo v povprečju za 4,2 meseca. To je za 0,1 meseca manj kot lani v tem mesecu in enako kot lansko povprečje.

Največ podjetij (18,7 %) ima proizvodnjo zagotovljeno v povprečju za 2 meseca. Sledijo podjetja (17,3 %), ki imajo proizvodnjo zagotovljeno v povprečju za več kot 10 mesecev, in podjetja (16,3 %), ki imajo proizvodnjo zagotovljeno v povprečju za 3 mesece. Za pol meseca ima zagotovljeno proizvodnjo v povprečju 7,1 % podjetij, ob novembrskem proizvodnem ritmu pa nima zagotovljene proizvodnje v povprečju 1,9 % podjetij.

IZVOZ in IZVOZNA PRIČAKOVANJA

Desezonirana vrednost kazalca ravni izvoznih naročil se je v primerjavi s preteklim mesecem znižala za 4 odstotne točke. V primerjavi z istim mesecem lani je bila višja za 9 odstotnih točk in za 19 odstotnih točk nad lanskim povprečjem.

Desezonirana vrednost kazalca pričakovanega izvoza za naslednje 3 mesece se je v primerjavi s preteklim mesecem znižala za 13 odstotnih točk. V primerjavi z istim mesecem lani je bila nižja za 1 odstotno točko in enaka povprečju lanskega leta.

SKUPNA NAROČILA in PRIČAKOVANO SKUPNO POVPRŠEVANJE

Desezonirana vrednost kazalca ravni skupnih naročil se je v primerjavi s preteklim mesecem znižala za 1 odstotno točko. Glede na isti mesec lani je bila višja za 5 odstotnih točk in 16 odstotnih točk nad povprečjem lanskega leta.

Desezonirana vrednost kazalca pričakovanega skupnega povpraševanja za naslednje 3 mesece je bila za 7 odstotnih točk nižja kot pretekli mesec. Glede na isti mesec lani je bila višja za 2 odstotni točki ter za 6 odstotnih točk višja od lanskega povprečja.

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 11 odstotnih točk in 10 odstotnih točk nad povprečjem lanskega leta.

COMMENT

In November, managers estimated business tendencies in manufacturing as being worse than in the previous month. The seasonally adjusted value of the confidence indicator fell by 2 percentage points compared to the previous month. Compared to October 2003 it was up by 1 percentage point and 5 percentage points above last year's average.

The decrease of the confidence indicator was influenced by the fall of overall order books and production expectations.

PRODUCTION and PRODUCTION EXPECTATIONS

The seasonally adjusted value of the production indicator fell by 2 percentage points compared to the previous month. Compared to November 2003 it was down by 10 percentage points and the same as last year's average.

The seasonally adjusted value of production expectations for the next three months fell by 12 percentage points compared to the previous month. Compared to November 2003 it was down by 6 percentage points and compared to last year's average by 1 percentage point.

ASSURED PRODUCTION

With the same production rhythm as in November, production in enterprises is assured on average for the next 4.2 months. This is 0.1 month less than in November last year and the same as last year's average.

In most enterprises (18.7%) production is assured for two months. They are followed by enterprises whose production is assured for more than ten months (17.3%) and those whose production is assured for three months (16.3%). Should the November production rhythm continue, 7.1% of enterprises have production assured for half a month while 1.9% of enterprises have no assured production.

EXPORT ORDER BOOKS and EXPECTED EXPORT ORDER BOOKS

The seasonally adjusted value of the export order books indicator fell by 4 percentage points compared to the previous month. Compared to November 2003 it was up by 9 percentage points and compared to last year's average by 19 percentage points.

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

OVERALL ORDER BOOKS and EXPECTED TOTAL DEMAND

The seasonally adjusted value of the overall order books indicator fell by 1 percentage point compared to the previous month. Compared to November 2003 it was up by 5 percentage points and compared to last year's average by 16 percentage points.

The seasonally adjusted value of expected total demand for the next three months fell by 7 percentage point compared to the previous month. Compared to November 2003 it was up by 2 percentage points and up by 6 percentage points compared to 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 November 2003 it was up by 11 percentage points and compared to last year's average by 10 percentage points.



ZALOGE

Desezonirana vrednost kazalca ravni zalog končnih izdelkov je bila nižja za 3 odstotne točke glede na pretekli mesec. Glede na isti mesec lani je bila nižja za 5 odstotnih točk in 6 odstotnih točki pod povprečjem lanskega leta.

PRIČAKOVANO ZAPOSLOVANJE

Desezonirana vrednost kazalca pričakovanj glede zaposlovanja v naslednjih 3 mesecih je bila za 4 odstotne točke nižja kot pretekli mesec. V primerjavi z istim mesecem lani je bila nižja za 3 odstotne točke in 1 odstotno točko pod povprečjem lanskega leta.

STOCKS OF FINISHED PRODUCTS

The seasonally adjusted value of the stocks of finished products indicator fell by 3 percentage points compared to the previous month. Compared to November 2003 it was down by 5 percentage points and compared to last year's average by 6 percentage points.

EXPECTED EMPLOYMENT

The seasonally adjusted value of expected employment for the next three months fell by 4 percentage points compared to the previous month. Compared to November 2003 it was down by 3 percentage point and compared to last year's average by 1 percentage point.

Sestavila / Prepared by: Jelena Čirjakovič

Izdaja, založba in tisk Statistični urad Republike Slovenije, Ljubljana, Vožarski pot 12 - **Uporaba in objava podatkov dovoljena le z navedbo vira** - Odgovarja generalna direktorica mag. Irena Krizman - Urednica zbirke Statistične informacije Marina Urbas - Slovensko besedilo jezikovno uredila Ivanka Zobec in Joža Lakovič - Angleško besedilo jezikovno uredil Boris Panič - Naklada 105 izvodov - ISSN zbirke Statistične informacije 1408-192X - ISSN podzbirke Rudarstvo in predelovalne dejavnosti 1408-8908 - Informacije daje Informacijsko središče, tel.: (01) 241 51 04 - El. pošta: info.stat@gov.si - <http://www.stat.si>.

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