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17 RUDARSTVO IN PREDELOVALNE DEJAVNOSTI
MINING AND MANUFACTURING

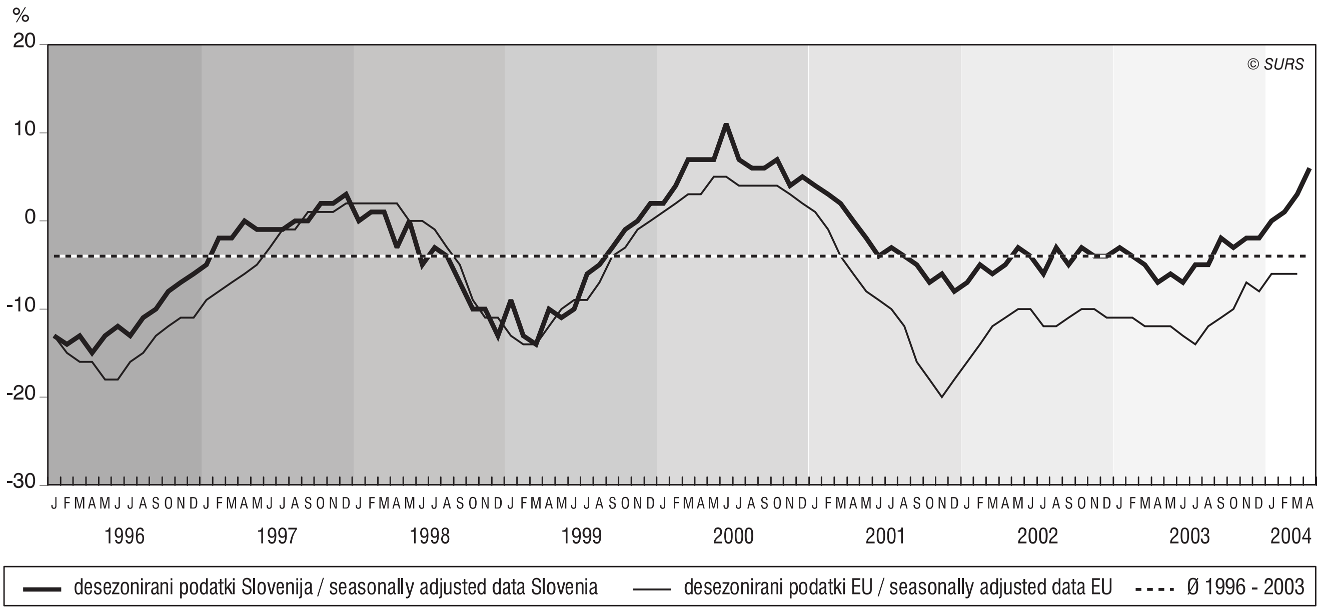
št./No 8

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

- Aprila so direktorji tendence v predelovalnih dejavnostih ocenili boljše kot pretekli mesec – desezonirana vrednost kazalca zaupanja je bila namreč v aprilu za 3 odstotne točke višja kot v marcu. Hkrati je bila kar za 17 odstotnih točk višja kot v lanskem aprilu in za 10 odstotnih točk nad lanskim povprečjem.
- Na zvišanje kazalca zaupanja v tem mesecu sta najbolj vplivala porast skupnih naročil in padec ravni zalog končnih izdelkov.
- Kazalci stanj so se v primerjavi s preteklim mesecem izboljšali. Pričakovanja za naslednje tri mesece, če izvzamemo pričakovano zaposlovanje in pričakovano skupno povpraševanje, so ugodna.

- In April managers estimated business tendencies in manufacturing as being better than in the previous month. The seasonally adjusted value of the confidence indicator rose by 3 percentage points compared to the previous month. Compared to April 2003 it rose by 17 percentage points and was 10 percentage points above last year's average.
- The evolution of the confidence indicator in this month was influenced by the rise of overall order books and the fall of stocks of finished products.
- Observed indicators for appreciation of the situation improved compared to the previous month. The expectations for the next three months are favourable, except for expected employment and expected total demand.

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

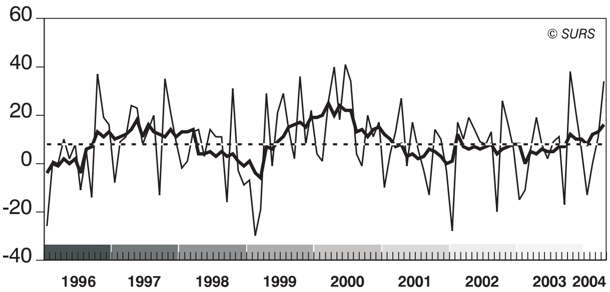
[2] Vir podatkov je Evropska komisija. Podatki o EU za zadnji mesec nam niso na voljo.
Source for EU data is European Commission. Data for EU for the last month are not available.

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

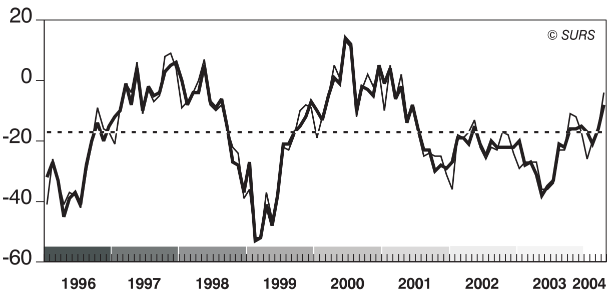
2. EVOLUTION OF ECONOMIC INDICATORS IN MANUFACTURING IN SLOVENIA, JANUARY 1996 - APRIL 2004

Ocena stanj / Appreciation of situation

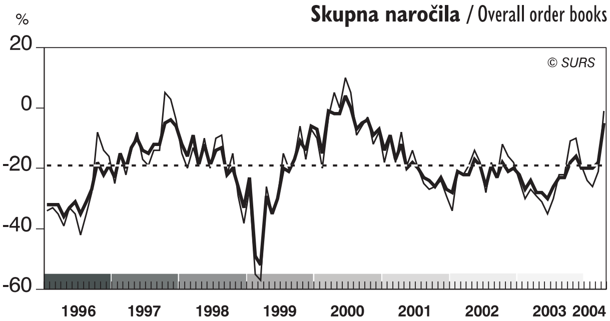
Proizvodnja / Production



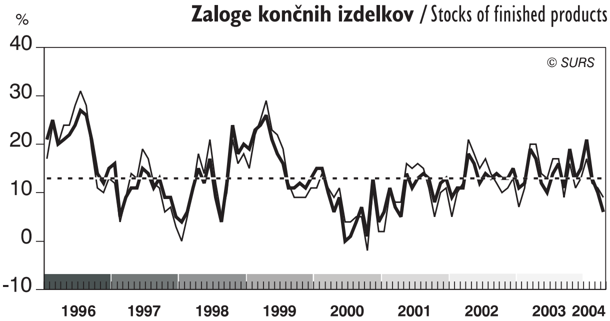
Izvozna naročila / Export order books



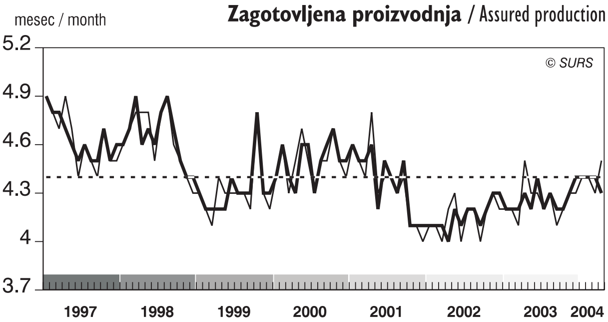
Skupna naročila / Overall order books



Zaloge končnih izdelkov / Stocks of finished products

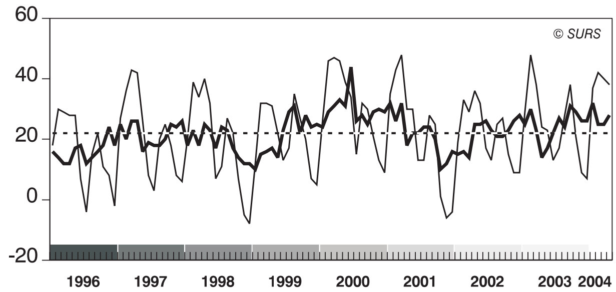


Zagotovljena proizvodnja / Assured production

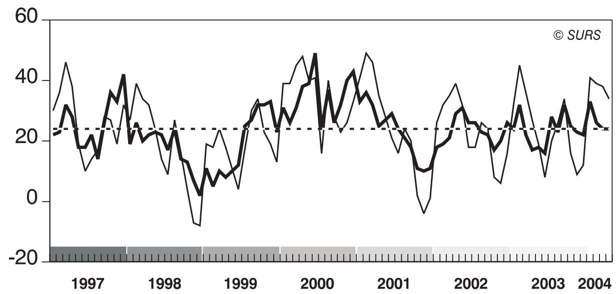


Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months

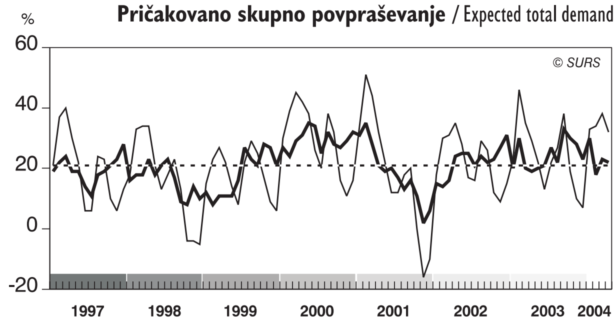
Pričakovana proizvodnja / Production expectations



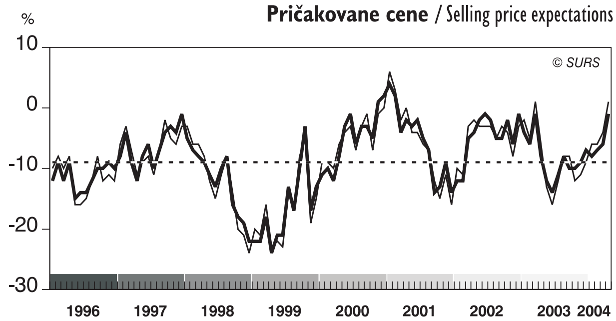
Pričakovan izvoz / Expected export order books



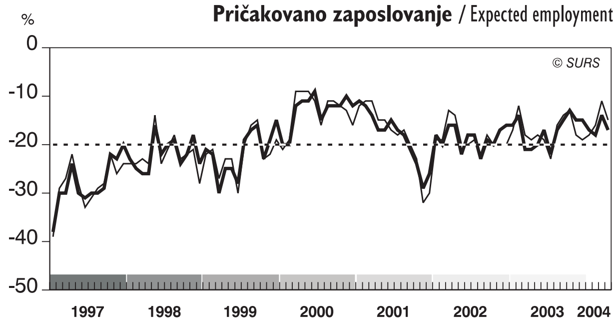
Pričakovano skupno povpraševanje / Expected total demand



Pričakovane cene / Selling price expectations



Pričakovano zaposlovanje / Expected employment



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

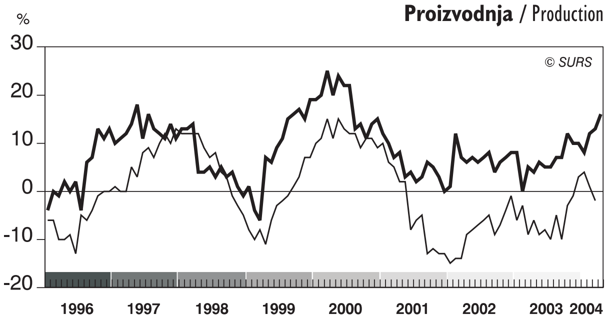
3. GIBANJE EKONOMSKIH KAZALCEV V PREDELOVALNIH DEJAVNOSTIH V SLOVENIJI IN EU, JANUAR 1996 - APRIL 2004[1]

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

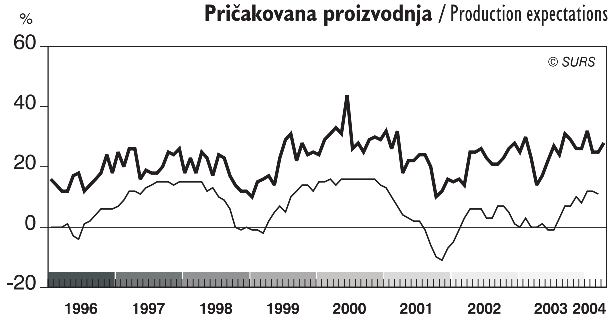
Ocena stanj / Appreciation of situation

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

Proizvodnja / Production

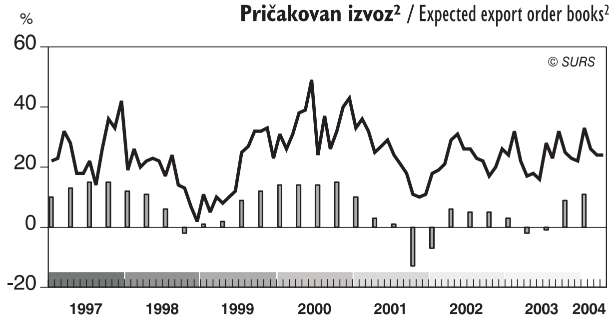


Pričakovana proizvodnja / Production expectations

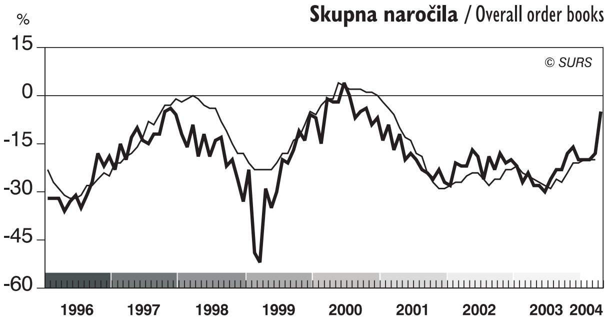


Izvozna naročila / Export order books

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

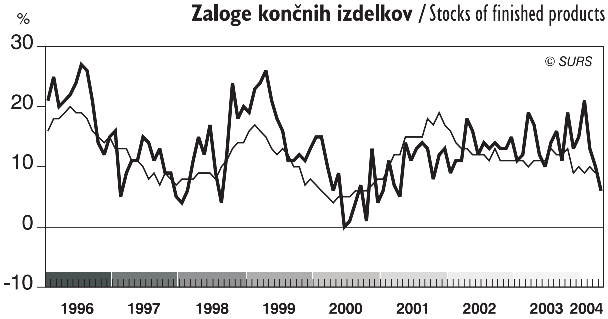


Skupna naročila / Overall order books

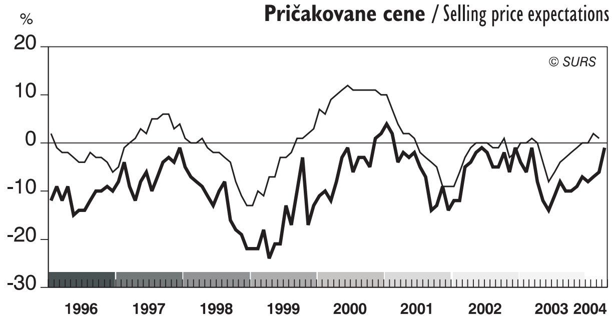


Pričakovano skupno povpraševanje[2] / Expected total demand[2]

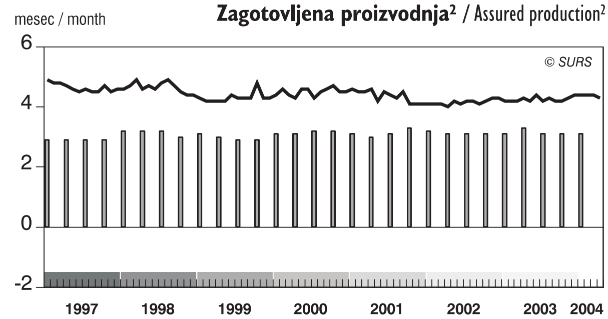
Zaloge končnih izdelkov / Stocks of finished products



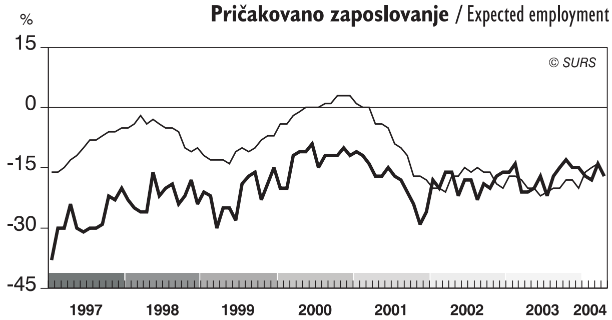
Pričakovane cene / Selling price expectations



Zagotovljena proizvodnja[2] / Assured production[2]



Pričakovano zaposlovanje / Expected employment



Slovenija / Slovenia EU

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

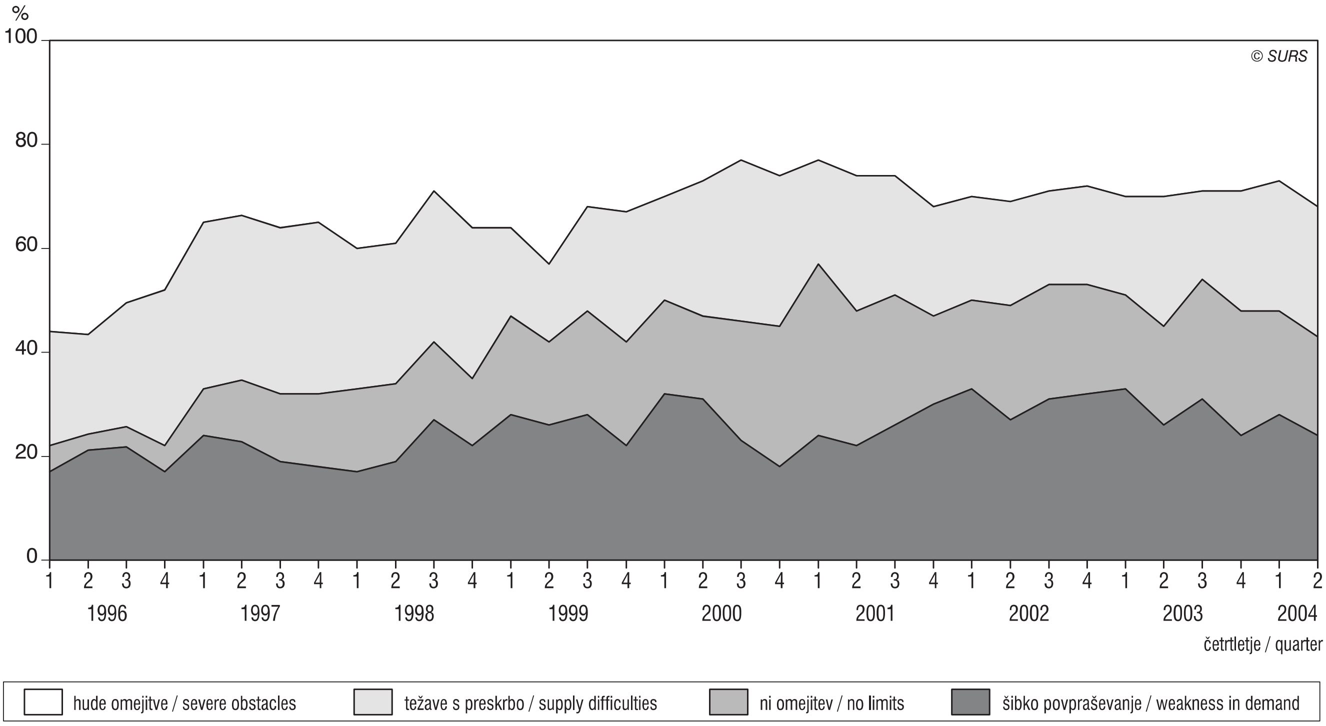
[2] Ekonomski kazalec opazujejo v EU vsake tri mesece. / Indicator in EU is observed every three months.

4. GIBANJE EKONOMSKIH KAZALCEV V PREDELOVALNIH DEJAVNOSTIH V SLOVENIJI IN EU, 1. ČETRTLETJE 1996 - 2. ČETRTLETJE 2004 - ČETRTLETNI PODATKI

4. EVOLUTION OF ECONOMIC INDICATORS IN MANUFACTURING IN SLOVENIA AND EU, 1st QUARTER 1996 - 2nd 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:

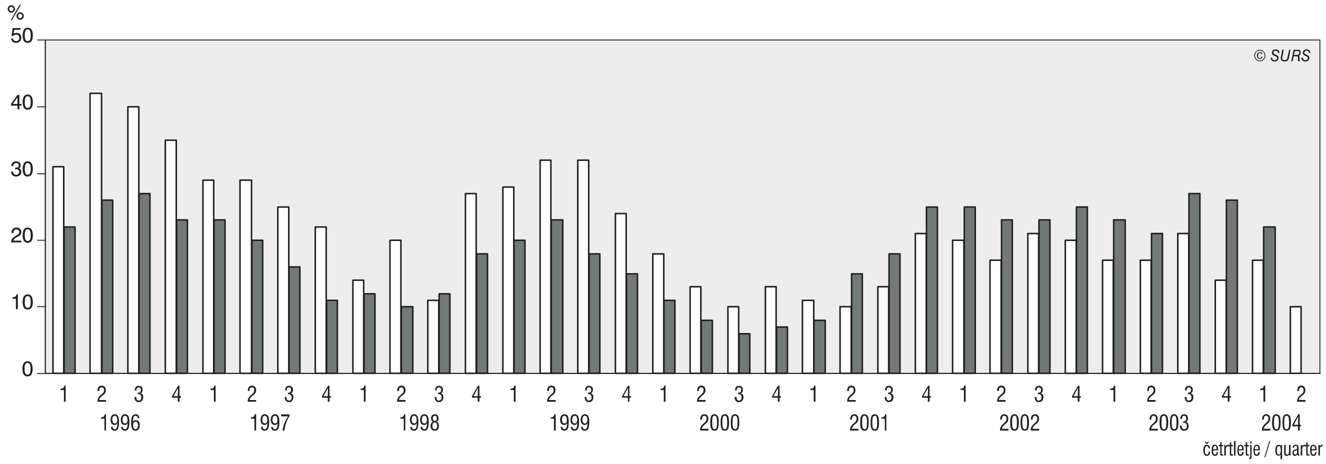
- Skupina **hude omejitve** zajema zaposlene, ki imajo hkrati težave tako z dejavniki iz skupine "šibko povpraševanje" kot tudi z dejavniki iz skupine "težave s preskrbo".
- Skupina **težave s preskrbo** zajema zaposlene, ki imajo probleme s pomanjkanjem delavcev, surovin, polizdelkov, opreme in/ali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

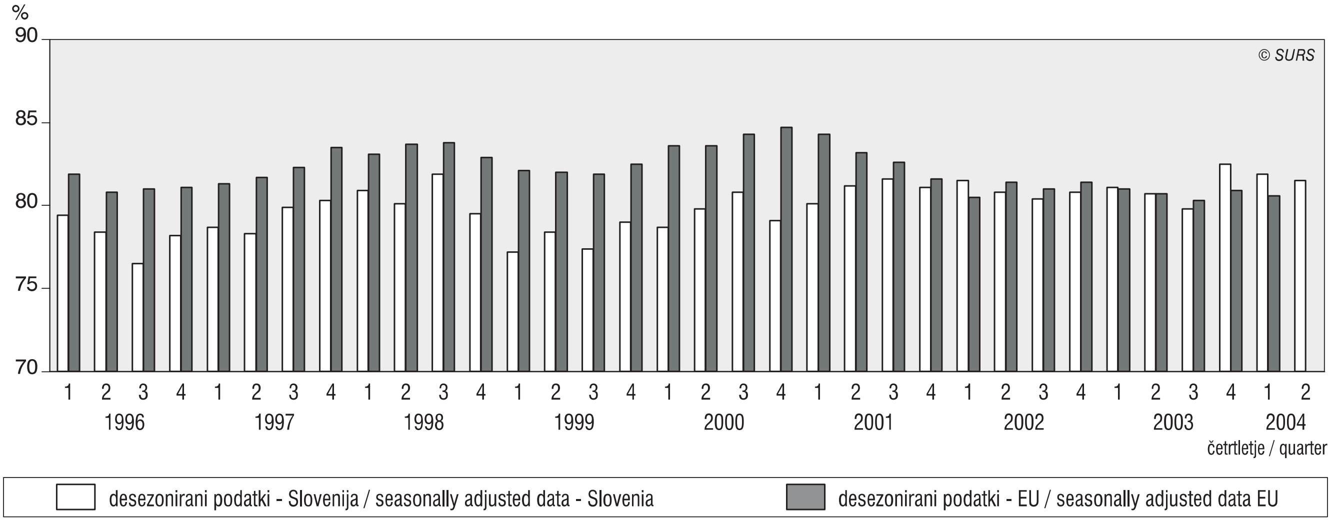
4.2 Ustreznost proizvodnih zmogljivosti glede na pričakovano povpraševanje v naslednjih 12 mesecih, Slovenija in EU

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]

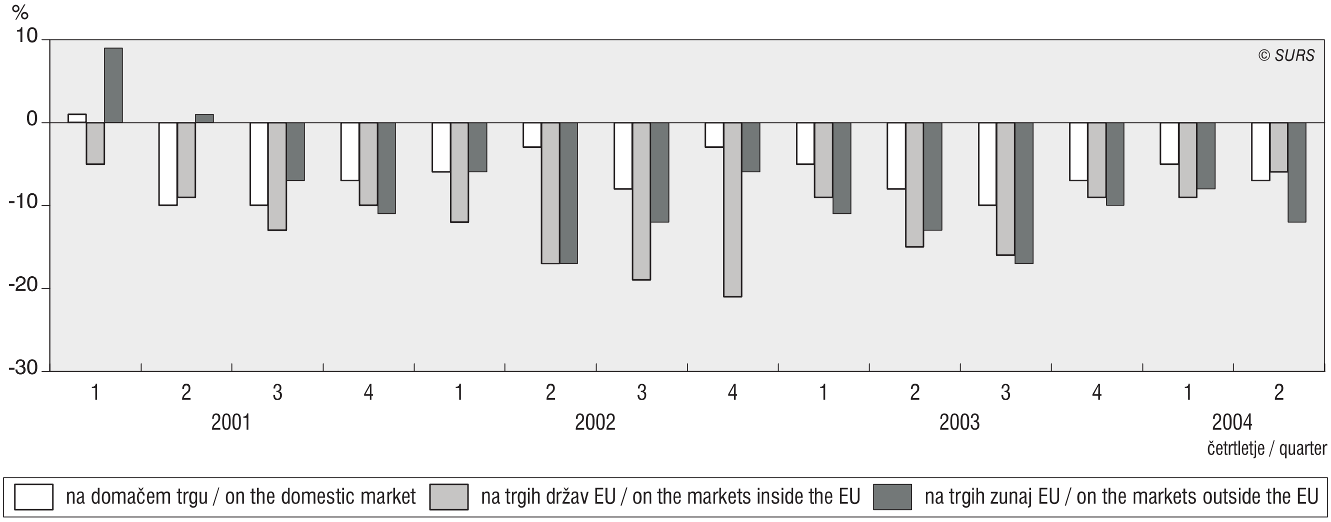
4.3 Current capacity utilisation in Slovenia and EU[1]



[1] Prikazana je povprečna stopnja izkoriščenosti proizvodnih zmogljivosti (tehnično-tehnoloških, človekških 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 serija 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

Aprila so direktorji tendence v predelovalnih dejavnostih ocenili boljše kot pretekli mesec – desezonirana vrednost kazalca zaupanja je bila za 3 odstotne točke višja kot v preteklem mesecu in je dosegla najvišjo vrednost po oktobru 2000. V primerjavi z lanskim aprilom je bila ta vrednost višja za 17 odstotnih točk, glede na lansko povprečje pa za 10 odstotnih točk.

Na zvišanje kazalca zaupanja v tem mesecu sta najbolj vplivala porast skupnih naročil in padec ravni zalog končnih izdelkov.

PROIZVODNJA in PROIZVODNA PRIČAKOVANJA

Desezonirana vrednost kazalca proizvodnje se je v primerjavi s preteklim mesecem zvišala za 3 odstotne točke in dosegla najvišjo vrednost po juliju 2000. Glede na isti mesec lani je bila višja za 15 odstotnih točk, glede na lansko povprečje pa za 9 odstotnih točk.

Desezonirana vrednost kazalca proizvodnih pričakovanj za naslednje 3 mesece se je zvišala za 3 odstotne točke. V primerjavi z istim mesecem lani je bila višja za 14 odstotnih točk in za 3 odstotne točke višja od lanskega povprečja.

ZAGOTOVLJENA PROIZVODNJA

Ob aprilskem proizvodnem ritmu imajo podjetja zagotovljeno proizvodnjo v povprečju za 4,3 meseca. To je enako kot lani v tem mesecu in enako lanskemu povprečju.

Največ podjetij (18,1 %) ima proizvodnjo zagotovljeno v povprečju za več kot 10 mesecev. Sledijo podjetja (15,5 %), ki imajo proizvodnjo zagotovljeno v povprečju za 1 mesec, in podjetja (15,1 %), ki imajo proizvodnjo zagotovljeno v povprečju za 2 meseca. Za pol meseca ima zagotovljeno proizvodnjo v povprečju 5,6 % podjetij, ob aprilskem proizvodnem ritmu pa nima zagotovljene proizvodnje v povprečju 2,4 % podjetij.

OMEJITVE V PROIZVODNJI

Med omejitvenimi dejavniki v proizvodnji so prevladovali dejavniki iz skupine hude omejitve. V tem mesecu se je z njimi spopadalo 32 % zaposlenih (oziroma 34 % podjetij), kar je za 2 odstotni točki več kot lani v tem mesecu in 3 odstotne točke nad lanskim povprečjem.

Sledili so omejitveni dejavniki iz skupine težave s preskrbo. V tem mesecu se je z njimi srečevalo 25 % zaposlenih (oziroma 27 % podjetij), kar je enako kot isti mesec lani in 4 odstotne točke nad lanskim povprečjem.

Z dejavniki iz skupine šibko povpraševanje se je v tem mesecu srečalo 24 % zaposlenih (oziroma 25 % podjetij) v predelovalnih dejavnostih. Glede na isti mesec lani je bil odstotek nižji za 2 odstotni točki in za 5 odstotnih točk pod lanskim povprečjem.

19 % zaposlenih (oziroma 14 % podjetij) v tem mesecu ni imelo omejitev v proizvodnji. Glede na isti mesec lani je bil odstotek enak in 2 odstotni točki pod lanskim povprečjem.

COMMENT

In April managers estimated business tendencies in manufacturing as being better than in the previous month. The seasonally adjusted value of the confidence indicator rose by 3 percentage points compared to the previous month and reached the highest value since October 2000. Compared to April 2003 it rose by 17 percentage points and was 10 percentage points above last year's average.

The evolution of the confidence indicator in this month was influenced by the rise of overall order books and the fall of stocks of finished products.

PRODUCTION and PRODUCTION EXPECTATIONS

The seasonally adjusted value of the production indicator rose by 3 percentage points compared to the previous month and reached the highest value since July 2000. Compared to April 2003 it was up by 15 percentage points and compared to last year's average by 9 percentage points.

The seasonally adjusted value of production expectations for the next three months rose by 3 percentage points. Compared to April 2003 it was up by 14 percentage points and compared to last year's average by 3 percentage points.

ASSURED PRODUCTION

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

In most enterprises (18.1%) production is assured for more than 10 months. They are followed by enterprises whose production is assured for one month (15.5%) and those whose production is assured for two months (15.1%). Should the April production rhythm continue, 5.6% of enterprises have production assured for half a month and 2.4% of enterprises have no assured production.

LIMITS TO PRODUCTION

Among factors limiting production, severe obstacles prevailed. In April 2004, 32% of employees (34% of enterprises) faced these limits, which is 2 percentage points more than in April 2003 and 3 percentage points above last year's average.

The second most important limits were supply difficulties. In April 2004, 25% of employees (27% of enterprises) faced these limits, which is the same as in April 2003 and 4 percentage points above last year's average.

The third most important limits were demand difficulties. In April 2004, 24% of employees (25% of enterprises) faced these limits, which is 2 percentage points less than in April 2003 and 5 percentage points below last year's average.

In April 2004, 19% of employees (14% of enterprises) faced no limits, which is the same as in April 2003 and 2 percentage points below last year's average.

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

- 36 % podjetij (ali 29 % zaposlenih) omejevalo nezadostno domače povpraševanje;
- 33 % podjetij (ali 36 % zaposlenih) omejevalo nezadostno tuje povpraševanje;
- 22 % podjetij (ali 20 % zaposlenih) omejeval konkurenčni uvoz;
- 22 % podjetij (ali 18 % zaposlenih) omejevalo pomanjkanje usposobljenih delavcev;
- 20 % podjetij (ali 19 % zaposlenih) omejevale neporavnane obveznosti iz poslovanja;
- 16 % podjetij (ali 11 % zaposlenih) omejevali finančni problemi, kot so neugodni pogoji kreditiranja, težave pri pridobivanju kreditov itd.;
- 14 % podjetij (ali 19 % zaposlenih) ni imelo proizvodnih omejitev;
- 12 % podjetij (ali 13 % zaposlenih) imelo težave zaradi negotovih gospodarskih razmer;
- 10 % podjetij (ali 10 % zaposlenih) omejevalo pomanjkanje surovin;
- 9 % podjetij (ali 10 % zaposlenih) omejevalo pomanjkanje ustrezne opreme;
- 7 % podjetij (ali 10 % zaposlenih) omejevali drugi dejavniki, npr. nelojalna konkurenca, tečajna politika, pomanjkanje zmogljivosti, visoki stroški dela;
- 6 % podjetij (ali 6 % zaposlenih) omejevala nejasna gospodarska zakonodaja;
- 2 % podjetij (ali 2 % zaposlenih) omejevalo pomanjkanje delavcev na splošno;
- 1 % podjetij (ali 1 % zaposlenih) omejevalo pomanjkanje polizdelkov.

Največja omejitev v proizvodnji ostaja nezadostno domače povpraševanje, sledijo nezadostno tuje povpraševanje in pomanjkanje usposobljenih delavcev ter konkurenčni uvoz. Med omejitvenimi dejavniki v tem mesecu najbolj izstopajo pomanjkanje surovin in finančni problemi, s katerima se je srečevalo za 7 oziroma 3 odstotne točke več podjetij kot januarja.

Le 14 % podjetij ni imelo omejitev v proizvodnji.

IZKORIŠČENOST ZMOGLJIVOSTI

Aprilska povprečna izkoriščenost zmogljivosti je bila 81,5-odstotna ali za 0,4 odstotne točke nižja kot januarja. V primerjavi z istim mesecem lani je bila za 0,8 odstotne točke višja 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 v primerjavi z zadnjim opazovanim mesecem nižja za 7 odstotnih točk. V primerjavi z istim mesecem lani je bila nižja za 7 odstotnih točk in 7 točk pod povprečjem lanskega leta.

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

- 36% of enterprises (or 29% of employees) were limited by insufficient domestic demand,
- 33% of enterprises (or 36% of employees) were limited by insufficient foreign demand,
- 22% of enterprises (or 20% of employees) were limited by competitive imports,
- 22% of enterprises (or 18% of employees) were limited by shortage of skilled labour,
- 20% of enterprises (or 19% of employees) were limited by problems with unpaid bills,
- 16% of enterprises (or 11% of employees) were limited by financial problems such as unfavourable credit terms, difficulties in obtaining credits, etc.,
- 14% of enterprises (or 19% of employees) experienced no limits,
- 12% of enterprises (or 13% of employees) were limited by uncertain economic conditions,
- 10% of enterprises (or 10% of employees) were limited by shortage of raw materials,
- 9% of enterprises (or 10% of employees) were limited by lack of appropriate equipment,
- 7% of enterprises (or 10% of employees) were limited by other factors such as unfair competition, exchange-rate policy, lack of capacity, high labour costs,
- 6% of enterprises (or 6% of employees) were limited by unclear economic legislation,
- 2% of enterprises (or 2% of employees) were limited by shortage of labour in general,
- 1% of enterprises (or 1% of employees) were limited by shortage of semi-finished products.

The most important factor limiting production is still insufficient domestic demand, followed by insufficient foreign demand, shortage of skilled labour and competitive imports. Limits to production that gained importance in April 2004 are shortage of raw materials and financial problems. Compared to January 2004, the number of enterprises that selected these limits rose by 7 and 3 percentage points respectively.

Only 14% of enterprises experienced no limits to production.

CAPACITY UTILISATION

In April the average capacity utilisation was 81.5%, which is 0.4 percentage point less than in January 2004. Compared to April 2003 it was up by 0.8 percentage point and 0.5 percentage point above last year's average.

CURRENT PRODUCTION CAPACITY

Compared to January 2004, the assessment of current production capacity in comparison with expected demand in the next 12 months was down by 7 percentage points. Compared to April 2003 it was down by 7 percentage points and 7 percentage points below last year's average.

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%.

IZVOZ in IZVOZNA PRIČAKOVANJA

Desezonirana vrednost kazalca ravni izvoznih naročil se je v primerjavi s preteklim mesecem zvišala za 8 odstotnih točk in dosegla najvišjo vrednost po juniju 2001. V primerjavi z istim mesecem lani je bila višja za 23 odstotnih točk in za 17 odstotnih točk nad lanskim povprečjem.

Desezonirana vrednost kazalca pričakovanega izvoza za naslednje 3 mesece je v primerjavi s preteklim mesecem ostala enaka. V primerjavi z istim mesecem lani je bila višja za 7 odstotnih točk in enaka lanskoletnemu povprečju.

SKUPNA NAROČILA in PRIČAKOVANO SKUPNO POVPRAŠEVANJE

Desezonirana vrednost kazalca ravni skupnih naročil se je v primerjavi s preteklim mesecem zvišala za 13 odstotnih točk in dosegla najvišjo vrednost po oktobru 2000. Glede na isti mesec lani je bila višja za 28 odstotnih točk in za 19 odstotnih točk nad povprečjem lanskega leta.

Desezonirana vrednost kazalca pričakovanega skupnega povpraševanja za naslednje 3 mesece se je v primerjavi s preteklim mesecem znižala za 1 odstotno točko. Glede na isti mesec lani je bila višja za 3 odstotne točke, za 2 odstotni točki pa je bila nižja od lanskega povprečja.

PRIČAKOVANE CENE

Desezonirana vrednost kazalca cenovnih pričakovanj za naslednje 3 mesece je bila v primerjavi s preteklim mesecem višja za 5 odstotnih točk. V primerjavi z istim mesecem lani je bila višja za 7 odstotnih točk in 7 točk nad lanskim povprečjem.

ZALOGE

Desezonirana vrednost kazalca ravni zalog končnih izdelkov se je v primerjavi s preteklim mesecem znižala za 4 odstotne točke in dosegla najvišjo v zadnjih 3 letih. Glede na isti mesec lani je bila nižja za 11 odstotnih točk, za 8 odstotnih točk pa je bila pod povprečjem lanskega leta.

PRIČAKOVANO ZAPOSLOVANJE

Desezonirana vrednost kazalca pričakovanj glede zaposlovanja v naslednjih 3 mesecih se je glede na pretekli mesec znižala za 3 odstotne točke. V primerjavi z istim mesecem lani je bila višja za 4 odstotne točke in enaka povprečju lanskega leta.

KONKURENČNI POLOŽAJ

Ocena konkurenčnega položaja podjetij na domačem trgu se je v primerjavi z januarjem znižala za 2 odstotni točki. V primerjavi z istim mesecem lani je bila višja za 1 odstotno točko in za 1 odstotno točko višja od lanskega povprečja.

Ocena konkurenčnega položaja podjetij na trgih držav članic Evropske unije je bila v primerjavi z januarjem višja za 3 odstotne točke. Glede na isti mesec lani je bila višja za 9 odstotnih točk, za 6 odstotnih točk pa je presegla lanskoletno povprečje.

EXPORT ORDER BOOKS and EXPECTED EXPORT ORDER BOOKS

The seasonally adjusted value of the export order books indicator rose by 8 percentage points compared to the previous month and reached the highest value since June 2001. Compared to April 2003 it was up by 23 percentage points and compared to last year's average by 17 percentage points.

The seasonally adjusted value of expected export in the next three months remained the same as in the previous month. Compared to April 2003 it was up by 7 percentage points 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 rose by 13 percentage points compared to the previous month and reached the highest value since October 2000. Compared to April 2003 it was up by 28 percentage points and compared to last year's average by 19 percentage points.

The seasonally adjusted value of expected total demand for the next three months fell by 1 percentage point compared to the previous month. Compared to April 2003 it was up by 3 percentage points while compared to last year's average it was down by 2 percentage points.

SELLING PRICE EXPECTATIONS

The seasonally adjusted value of selling price expectations for the next three months rose by 5 percentage point compared to the previous month. Compared to April 2003 it was up by 7 percentage points while compared to last year's average it was up by 7 percentage points.

STOCKS OF FINISHED PRODUCTS

The seasonally adjusted value of the stocks of finished products indicator fell by 4 percentage points compared to the previous month. Compared to April 2003 it was down by 11 percentage points and compared to last year's average by 8 percentage points.

EXPECTED EMPLOYMENT

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

COMPETITIVE POSITION

Compared to January 2004, the assessment of competitive position on the domestic market was down by 2 percentage points. Compared to April 2003 it was up by 1 percentage point and 1 percentage point above last year's average.

Compared to January 2004, the assessment of enterprise's competitive position on markets of EU Member States was up by 3 percentage points. Compared to April 2003 it was up by 9 percentage points and 6 percentage points above last year's average.

Ocena konkurenčnega položaja podjetij na trgih zunaj Evropske unije je bila v primerjavi z januarjem nižja za 4 odstotne točke. Glede na isti mesec lani je bila višja za 1 odstotno točko in za 1 odstotno točko nad lanskim povprečjem.

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

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