STATISTIČNI URAD REPUBLIKE SLOVENIJE
STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA

STATISTIČNE INFORMACIJE
RAPID REPORTS

2. FEBRUAR 2006
2 FEBRUARY 2006

št./No 31

17 RUDARSTVO IN PREDELOVALNE DEJAVNOSTI
MINING AND MANUFACTURING

št./No 4

POSLOVNE TENDENCE V PREDELOVALNIH DEJAVNOSTIH, SLOVENIJA, JANUAR 2006

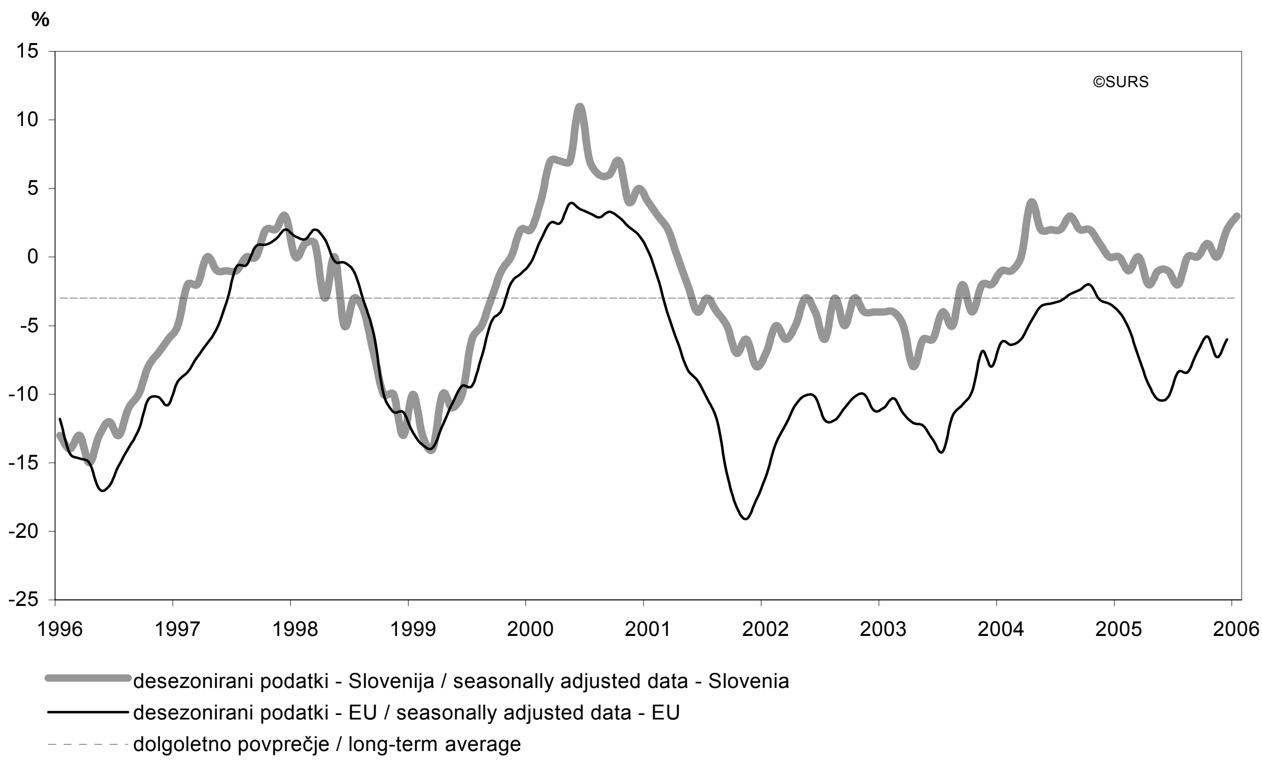
BUSINESS TENDENCY IN MANUFACTURING, SLOVENIA, JANUARY 2006

- Januarja 2006 so direktorji tendence v predelovalnih dejavnostih ocenili boljše kot pretekli mesec. Desezonirana vrednost kazalnika zaupanja je bila v primerjavi s preteklim mesecem višja za 1 odstotno točko, v primerjavi z istim mesecem lani je bila višja za 7 odstotnih točk in 3 odstotne točke nad lanskim povprečjem.
- Na zvišanje kazalnika zaupanja v predelovalnih dejavnostih so vplivala ugodna proizvodna pričakovanja.
- Kazalniki stanj so se v primerjavi s preteklim mesecem malenkostno poslabšali, pričakovanja za naslednje tri mesece so večinoma ugodna.

- In January 2006, managers estimated business tendencies in manufacturing as being better than in the previous month. The seasonally adjusted value of the confidence indicator rose by 1 percentage point compared to December 2005, by 7 percentage points compared to January 2005 and by 3 percentage points compared to last year's average.
- The improvement of the confidence indicator was influenced by the rise of production expectations.
- Observed indicators for appreciation of the situation slightly worsened in comparison to the previous month. The expectations for the next three months are mostly favourable.

1. KAZALNIK ZAUPANJA [1)] V SLOVENIJI IN EU [2)], JANUAR 1996 - JANUAR 2006

1. CONFIDENCE INDICATOR [1)] IN SLOVENIA AND EU [2)], JANUARY 1996 – JANUARY 2006



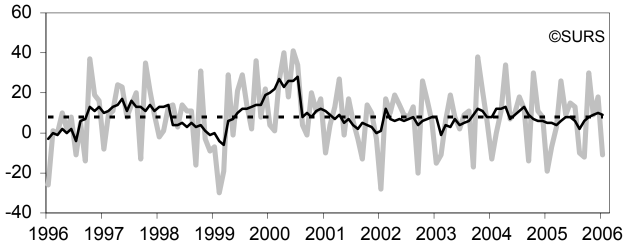
1) Kazalnik zaupanja je povprečje odgovorov (ravnotežij) na vprašanja o proizvodnih pričakovanjih, skupnih naročilih in zalogah končnih izdelkov (obrnjen predznak). Podatki so desezonirani. Confidence indicator is an average of responses (balances) to questions on production expectations, overall order-books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

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

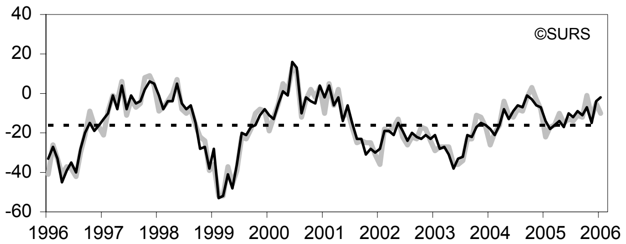
2. GIBANJE EKONOMSKIH KAZALNIKOV V PREDELOVALNIH DEJAVNOSTIH V SLOVENIJI, JANUAR 1996 - JANUAR 2006
EVOLUTION OF ECONOMIC INDICATORS IN MANUFACTURING IN SLOVENIA, JANUARY 1996 - JANUARY 2006

Ocena stanj
Appreciation of situation

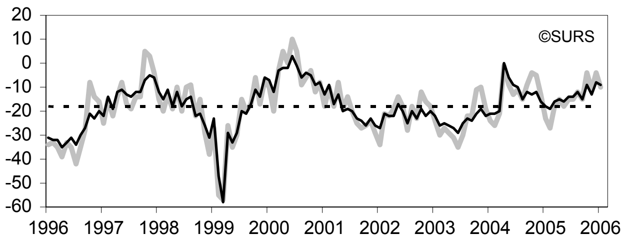
% **Proizvodnja** / Production



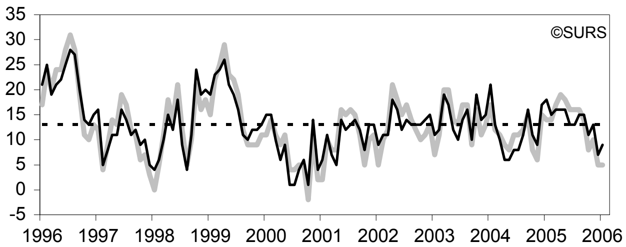
% **Izvozna naročila** / Export order-books



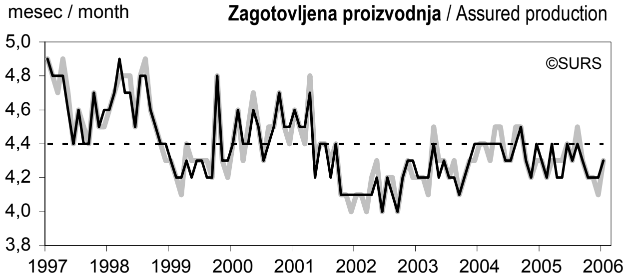
% **Skupna naročila** / Overall order-books



% **Zaloge končnih izdelkov** / Stocks of finished products

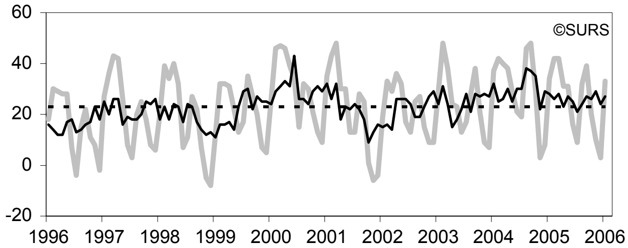


mesec / month **Zagotovljena proizvodnja** / Assured production

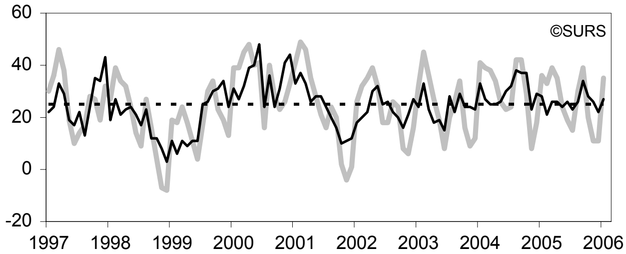


Pričakovanja v naslednjih 3 mesecih
Expectations in the next 3 months

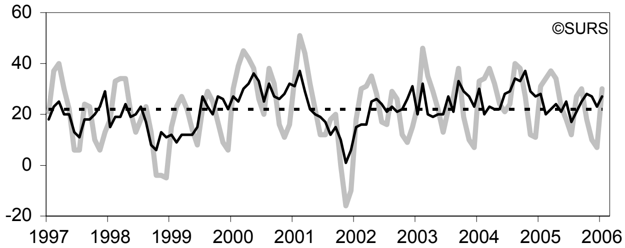
% **Pričakovana proizvodnja** / Production expectations



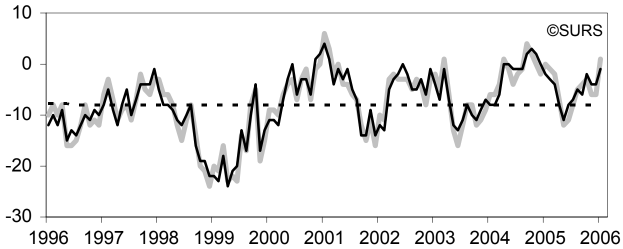
% **Pričakovan izvoz** / Expected export order-books



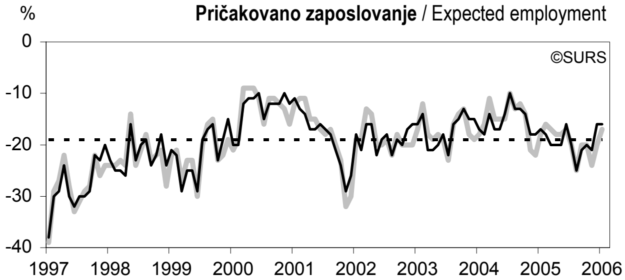
% **Pričakovano skupno povpraševanje** / Expected total demand



% **Pričakovane cene** / Selling price expectations



% **Pričakovano zaposlovanje** / Expected employment

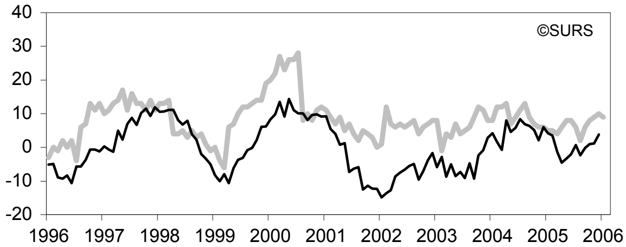


originalni podatki / raw data — desezonirani podatki / seasonally adjusted data - - - dolgoletno povprečje/ long-term average

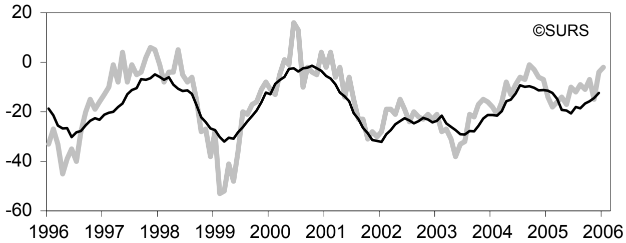
3. GIBANJE EKONOMSKIH KAZALNIKOV V PREDELOVALNIH DEJAVNOSTIH V SLOVENIJI IN EU, JANUAR 1996 - JANUAR 2006[1)]
EVOLUTION OF ECONOMIC INDICATORS IN MANUFACTURING IN SLOVENIA AND EU, JANUARY 1996 - JANUARY 2006[1)]

Ocena stanj
Appreciation of situation

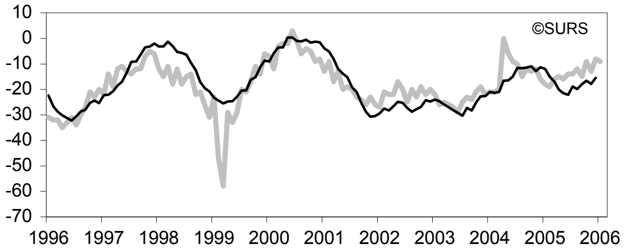
% **Proizvodnja** / Production



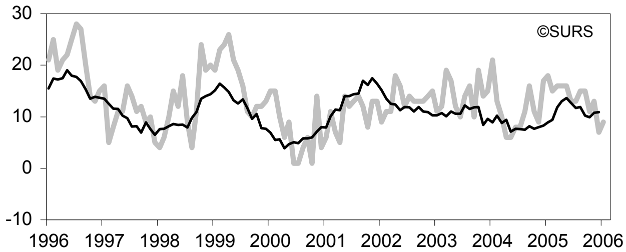
% **Izvozna naročila** / Export order-books



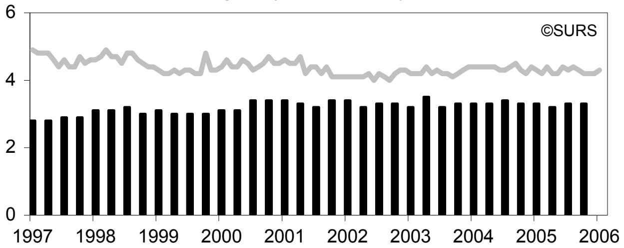
% **Skupna naročila** / Overall order-books



% **Zaloge končnih izdelkov** / Stocks of finished products

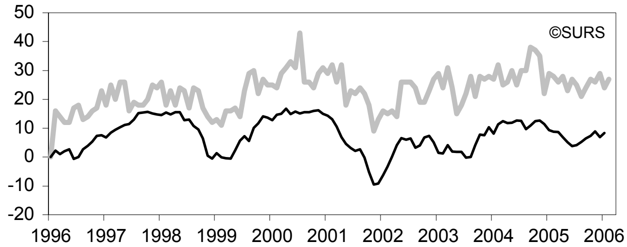


mesec / month **Zagotovljena proizvodnja**[2)] / Assured production[2)]

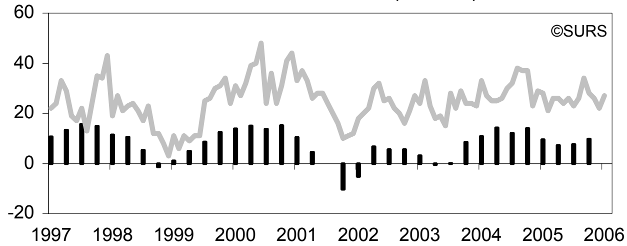


Pričakovanja v naslednjih 3 mesecih
Expectations in the next 3 months

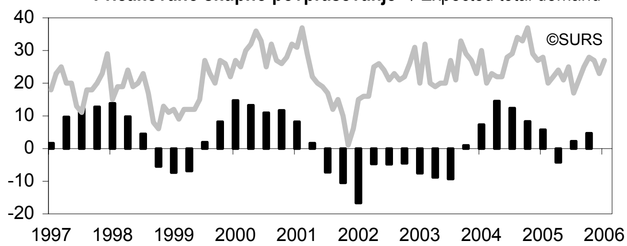
% **Pričakovana proizvodnja** / Production expectations



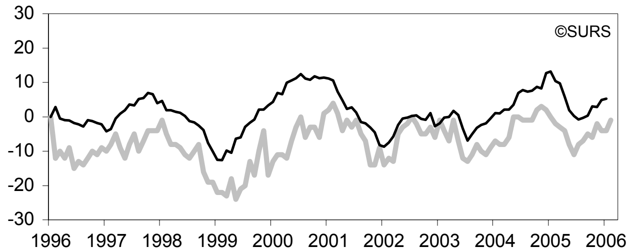
% **Pričakovan izvoz**[2)] / Expected export order-books[2)]



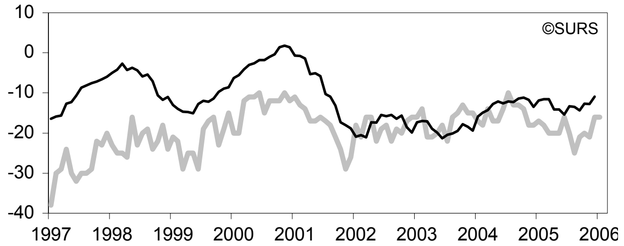
% **Pričakovano skupno povpraševanje**[2)] / Expected total demand[2)]



% **Pričakovane cene** / Selling price expectations



% **Pričakovano zaposlovanje**[2)] / Expected employment[2)]



Slovenija / Slovenia — EU

1) Vir / Source: http://europa.eu.int/comm/economy_finance/indicators/businessandconsumersurveys_en.htm

Podatki za EU za zadnji mesec niso na voljo. Podatki so desezonirani. / Data for EU for the last month are not available. Data are seasonally adjusted.

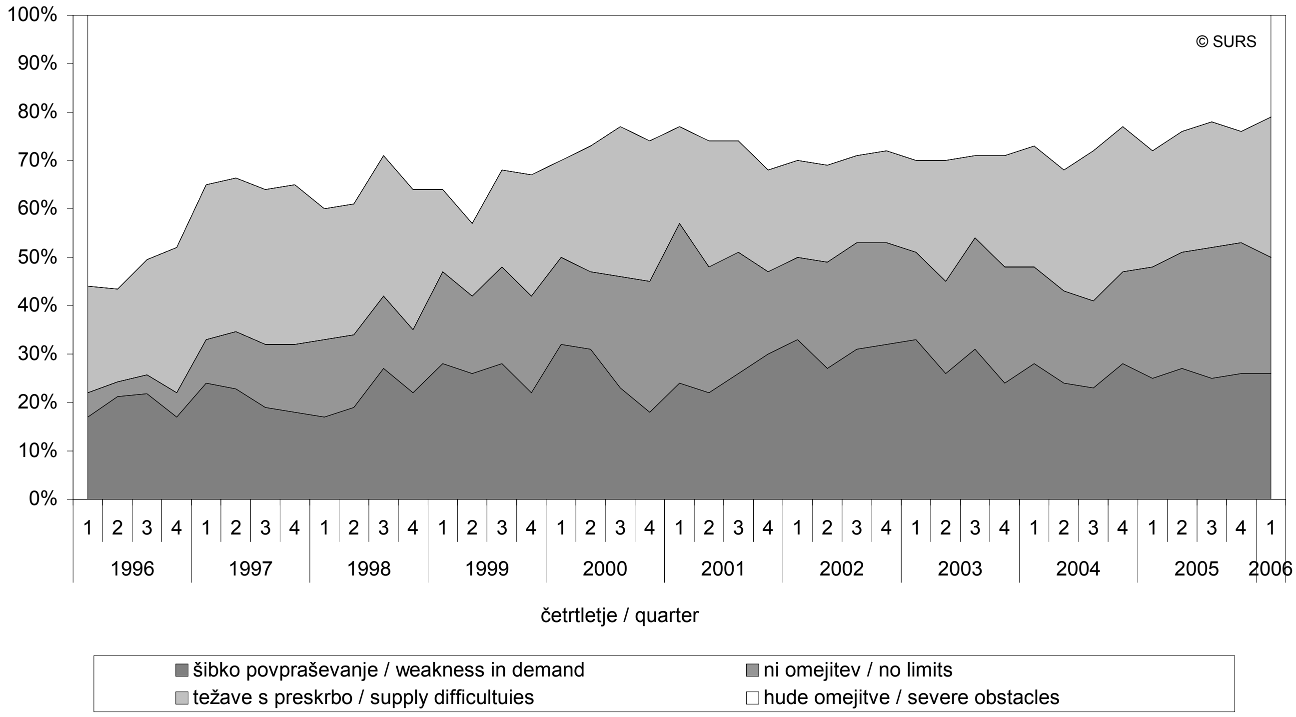
2) Kazalnik opazujejo v EU vsake tri mesece. / In the EU the indicator is observed every three months.

4. GIBANJE EKONOMSKIH KAZALNIKOV V PREDELOVALNIH DEJAVNOSTIH V SLOVENIJI IN EU, 1. ČETRTLETJE 1996 - 1. ČETRTLETJE 2006 - ČETRTLETNI PODATKI

EVOLUTION OF ECONOMIC INDICATORS IN MANUFACTURING IN SLOVENIA AND EU, 1ST QUARTER 1996 – 1ST QUARTER 2006 - QUARTERLY DATA

4.1 Omejitve v proizvodnji v Sloveniji

Production obstacles in Slovenia



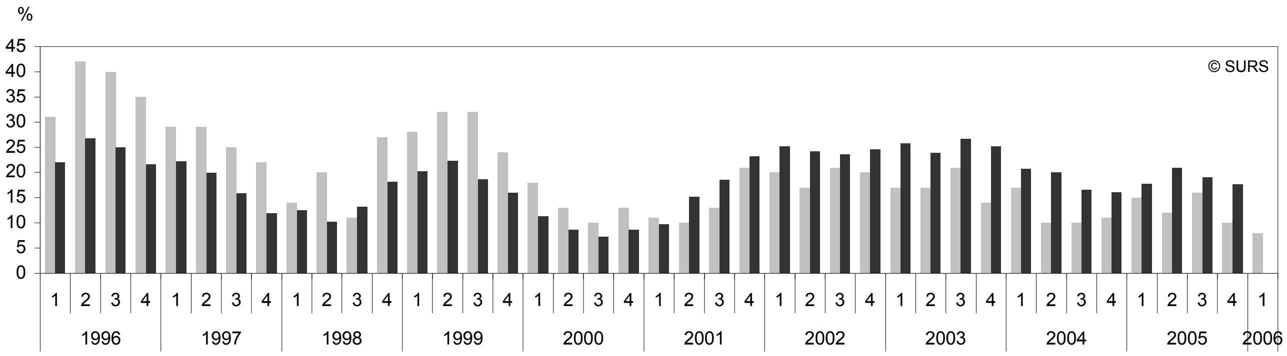
Graf o omejitvah v proizvodnji prikazuje delež zaposlenih, ki se soočajo z naslednjimi skupinami problemov:

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

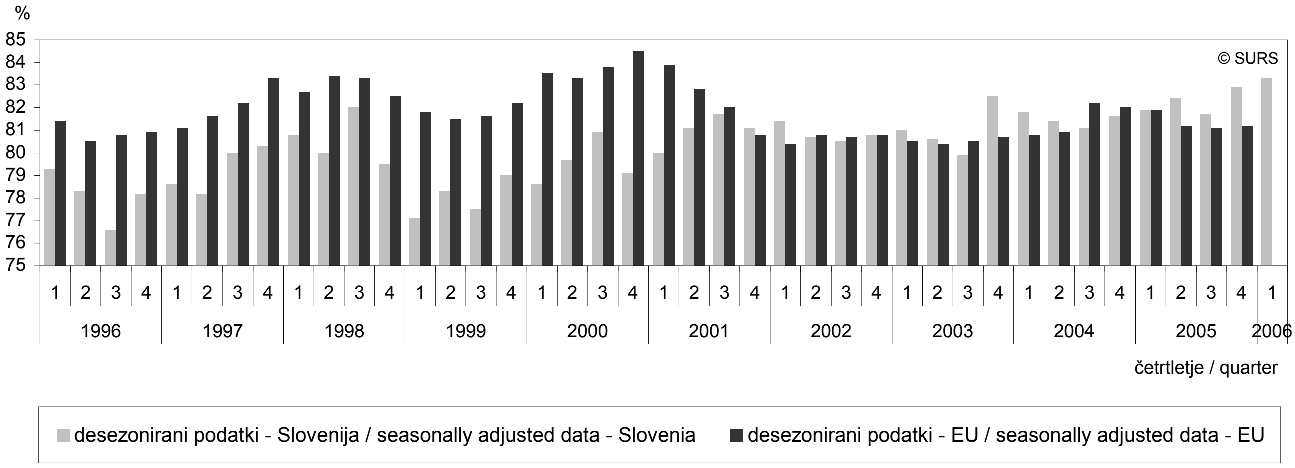
The chart on production obstacles shows the share of employees who are facing the following groups of problems:

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

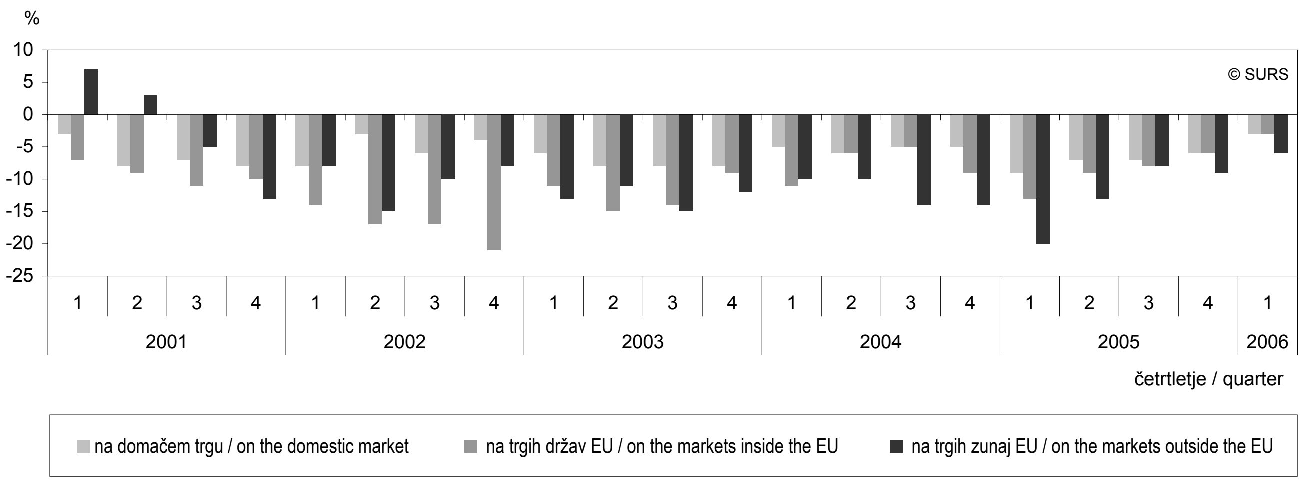
4.2 Ustreznost proizvodnih zmogljivosti glede na pričakovano povpraševanje v naslednjih 12 mesecih, Slovenija in EU
Assessment of current production capacities according to expected demand in the next 12 months, Slovenia and EU



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



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



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

METODOLOŠKA POJASNILA

NAMEN STATISTIČNEGA RAZISKOVANJA

Namen kvalitativne Ankete o poslovnih tendencah (PA-IND/M) je mesečno pridobivanje informacij o trenutnih stanjih glavnih ekonomskih kazalnikov ter ocenitev njihovega gibanja v naslednjih mesecih. Rezultati anket so osnova za izračun kazalnika zaupanja v predelovalnih dejavnostih in kazalnika gospodarske klime, ki vključuje poleg kazalnika zaupanja v predelovalnih dejavnostih tudi kazalnik zaupanja pri potrošnikih in kazalnik 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 okoli 25. v istem mesecu.

ZAJETJE

V panelni vzorec smo zajeli vsa velika podjetja, 59 % srednjevelikih (ali 64 % zaposlenih) in 18 % malih podjetij (ali 22 % zaposlenih). Panelni vzorec pokriva 39 % podjetij vzorčnega okvira ali 76 % zaposlenih v predelovalnih dejavnostih.

NAČIN ZBIRANJA PODATKOV

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

UTEŽEVANJE ODGOVOROV

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

NEODGOVORI

Neodgovore vsak mesec obdelamo skladno s poenoteno metodologijo; delež neodgovorov se giblje med 3 % in 15 % (povprečno 8 %).

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 kazalnikov.

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

METHODOLOGICAL EXPLANATIONS

PURPOSE OF STATISTICAL SURVEY

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

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

OBSERVATION UNITS

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

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

SOURCES

Respondents are managers of enterprises or other executives. They respond between the 1st and the 10th in the month. Results are published approximately on the 25th day of the current month.

COVERAGE

The panel includes all large enterprises, 59% of medium-sized enterprises (or 64% of employees) and 18% of small enterprises (or 22% of employees); the panel covers 39% of the enterprises of the studied population or 76% of employees in manufacturing.

METHOD OF DATA COLLECTING

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

WEIGHTS FOR RESPONSES

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

NON-RESPONSES

Non-responses are processed every month according to the harmonised methodology and vary between 3% and 15% (8% on average).

DEFINITIONS

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

In the charts with longer **time series** or by comparisons with EU indicators, data are seasonally adjusted. Values are adjusted for the seasonal component, but include the trend-cycle component and the irregular component. Data for EU are seasonally adjusted by the DAINTIES method metodo TRAMO/SEATS, ki temelji na modelih ARIMA. Pri oblikovanju modelov je upoštevano časovno obdobje od maja 1995 do januarja 2006, pri časovnih vrstah pričakovan izvoz, pričakovano skupno povpraševanje in povprečno število mesecev zagotovljene proizvodnje od januarja 1997 do januarja 2006, pri časovni vrsti stopnja izkoriščenosti zmogljivosti od drugega četrtletja 1995 do prvega četrtletja 2006, pri časovnih vrstah konkurenčni položaj podjetja na domačem trgu, konkurenčni položaj podjetja na trgih držav članic Evropske unije in konkurenčni položaj podjetja na trgih zunaj Evropske unije pa od prvega četrtletja 2001 do prvega četrtletja 2006. Zaradi narave podatkov se modeli za leto 2006 razlikujejo v primerjavi z modeli za leto 2005. Pri časovni vrsti ustreznost proizvodnih zmogljivosti sezonska komponenta ni prisotna.

Kazalnik 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 podatki dostopni 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 podatkovnem portalu 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?

and for Slovenia by the TRAMO/SEATS method, which is based on ARIMA models. The designing of the models is based on the time period from May 1995 to January 2006, the series expected export order-books, expected total demand and average assured production from January 1997 to January 2006, the series level of capacity utilisation from the second quarter of 1995 to the first quarter of 2006, and the series competitive position on the domestic market, competitive position on the foreign markets inside the EU and competitive position on the markets outside the EU from the first quarter of 2001 to the first quarter of 2006. Because of the nature of data, the models for 2006 differ from the models used in 2005. In the time series assessment of current production capacities the seasonal component is not present.

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

PUBLISHING

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

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

- 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 izven Evropske Unije v zadnjih 3 mesecih: boljši, nespremenjen, slabši?
- Obseg novih naročil se je v zadnjih 3 mesecih: povečal, ostal nespremenjen, zmanjšal?

KOMENTAR

Januarja 2006 so direktorji tendence v predelovalnih dejavnostih ocenili boljše kot pretekli mesec. Desezonirana vrednost kazalnika zaupanja je bila v primerjavi s preteklim mesecem višja za 1 odstotno točko, v primerjavi z istim mesecem lani je bila višja za 7 odstotnih točk in 3 odstotne točke nad lanskim povprečjem.

PROIZVODNJA in PRIČAKOVANA PROIZVODNJA

Desezonirana vrednost kazalnika proizvodnje je bila v primerjavi s preteklim mesecem nižja za 1 odstotno točko. Glede na isti mesec lani je bila višja za 8 odstotnih točk in 3 odstotne točke nad lanskim povprečjem.

Desezonirana vrednost kazalnika proizvodnih pričakovanj za naslednje tri mesece je bila v primerjavi s preteklim mesecem višja za 3 odstotne točke. V primerjavi z istim mesecem lani je bila nižja za 1 odstotno točko in 1 odstotno točko nad lanskim povprečjem.

IZVOZNA NAROČILA in PRIČAKOVANI IZVOZ

Desezonirana vrednost kazalnika ravni izvoznih naročil je bila v primerjavi s preteklim mesecem višja za 2 odstotni točki. Glede na isti mesec lani je bila višja za 12 odstotnih točk in 10 odstotnih točk nad lanskim povprečjem.

Desezonirana vrednost kazalnika pričakovanega izvoza za naslednje tri mesece je bila v primerjavi s preteklim mesecem višja za 5 odstotnih točk. V primerjavi z istim mesecem lani je bila nižja za 1 odstotno točko in 1 odstotno točko nad povprečjem lanskega leta.

SKUPNA NAROČILA in PRIČAKOVANO SKUPNO POVPRAŠEVANJE

Desezonirana vrednost kazalnika ravni skupnih naročil je bila v primerjavi s preteklim mesecem nižja za 1 odstotno točko. Glede na isti mesec lani je bila višja za 13 odstotnih točk in 5 odstotnih točk nad povprečjem lanskega leta.

Desezonirana vrednost kazalnika pričakovanega skupnega povpraševanja za naslednje tri mesece je bila v primerjavi s preteklim mesecem višja za 4 odstotne točke. Glede na isti mesec lani je bila nižja za 1 odstotno točko in 4 odstotne točke nad povprečjem lanskega leta.

ZALOGE KONČNIH IZDELKOV

Desezonirana vrednost kazalnika ravni zalog končnih izdelkov je bila v primerjavi s preteklim mesecem višja za 2 odstotni točki. Glede na isti mesec lani je bila nižja za 9 odstotnih točk in 5 odstotnih točk pod povprečjem lanskega leta.

PRIČAKOVANE CENE

Desezonirana vrednost kazalnika cenovnih pričakovanj za naslednje tri

- 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?

COMMENT

In January 2006, managers estimated business tendencies in manufacturing as being better than in the previous month. The seasonally adjusted value of the confidence indicator rose by 1 percentage point compared to December 2005, by 7 percentage points compared to January 2005 and by 3 percentage points compared to last year's average.

PRODUCTION and PRODUCTION EXPECTATIONS

The seasonally adjusted value of the production indicator was down by 1 percentage point compared to the previous month. Compared to January 2005 it rose by 8 percentage points and was 3 percentage points above last year's average.

The seasonally adjusted value of the production expectations for the next three months rose by 3 percentage points compared to the previous month. Compared to January 2005 it was down by 1 percentage point and was 1 percentage point above last year's average.

EXPORT ORDER-BOOKS and EXPECTED EXPORT ORDER-BOOKS

The seasonally adjusted value of the export order-books indicator was up by 2 percentage points compared to the previous month. Compared to January 2005 it was up by 12 percentage points and compared to last year's average by 10 percentage points.

The seasonally adjusted value of the expected export order-books in the next three months was up by 5 percentage points compared to the previous month. Compared to January 2005 it was down by 1 percentage point and 1 percentage point above 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 January 2005 it was up by 13 percentage points and 5 percentage points above last year's average.

The seasonally adjusted value of the expected total demand for the next three months rose by 4 percentage points compared to the previous month. Compared to January 2005 it was down by 1 percentage point and 4 percentage points above last year's average.

STOCKS OF FINISHED PRODUCTS

The seasonally adjusted value of the stocks of finished products indicator rose by 2 percentage points compared to the previous month. Compared to January 2005 it fell by 9 percentage points and compared to last year's average it was down by 5 percentage points.

SELLING PRICE EXPECTATIONS

The seasonally adjusted value of selling price expectations for the next three mesece je bila glede na pretekli mesec višja za 3 odstotne točke. V primerjavi z istim mesecem lani je bila višja za 1 odstotno točko in 4 odstotne točke nad povprečjem lanskega leta.

months rose by 3 percentage points compared to the previous month. Compared to January 2005 it was up by 1 percentage point and was 4 percentage points above last year's average.

ZAGOTOVLJENA PROIZVODNJA

Ob januarskem proizvodnem ritmu imajo podjetja zagotovljeno proizvodnjo v povprečju za 4,3 meseca. To je enako januarju lani in povprečju lanskega leta.

Največ podjetij (19,3 %) ima proizvodnjo zagotovljeno v povprečju za več kot 10 mesecev. Sledijo podjetja (19,0 %), ki imajo proizvodnjo zagotovljeno v povprečju za 3 mesece, in podjetja (18,9 %), ki imajo proizvodnjo zagotovljeno v povprečju za 2 meseca. Za pol meseca ima zagotovljeno proizvodnjo v povprečju 6,4 % podjetij, ob januarskem proizvodnem ritmu pa nima zagotovljene proizvodnje v povprečju 2,5 % podjetij.

ASSURED PRODUCTION

With the same production rhythm as in January 2006, production in enterprises is assured on average for the next 4.3 months. This is equal to January 2005 and last year's average.

In most enterprises (19.3%) production is assured for more than ten months. They are followed by enterprises in which production is assured for three months (19.0%) and those in which production is assured for two months (18.9%). Should the January production rhythm continue, 6.4% of enterprises have production assured for half a month, while 2.5% of enterprises have no assured production.

PRIČAKOVANO ZAPOSLOVANJE

Desezonirana vrednost kazalnika pričakovanj glede zaposlovanja v naslednjih 3 mesecih je bila enaka glede na pretekli mesec. V primerjavi z istim mesecem lani je bila višja za 1 odstotno točko in 4 odstotne točke nad povprečjem lanskega leta.

EXPECTED EMPLOYMENT

The seasonally adjusted value of expected employment for the next three months remained the same compared to the previous month. Compared to January 2005 it was up by 1 percentage point and 4 percentage points above last year's average.

OMEJITVE V PROIZVODNJI

V tem mesecu se je z omejitvenimi dejavniki iz skupine težave s preskrbo spopadalo 29 % zaposlenih (oziroma 31 % podjetij), kar je za 5 odstotnih točk več kot lani v tem mesecu in 4 odstotne točke nad povprečjem lanskega leta.

Sledili so omejitveni dejavniki iz skupine šibko povpraševanje. V tem mesecu se je z njimi srečevalo 26 % zaposlenih (oziroma 33 % podjetij), kar je za 1 odstotno točko več kot isti mesec lani in enako lanskemu povprečju.

V januarju 2006 ni imelo omejitev v proizvodnji 24 % zaposlenih (oziroma 14 % podjetij). Glede na isti mesec lani je bil odstotek višji za 1 odstotno točko in 1 odstotno točk pod lanskim povprečjem.

Z dejavniki iz skupine hude omejitve se je v tem mesecu srečalo 21 % zaposlenih (oziroma 22 % podjetij) v predelovalnih dejavnostih. Glede na isti mesec lani je bil odstotek nižji za 7 odstotnih točk in 4 odstotne točke pod lanskim povprečjem.

Podrobnejši pregled omejitvenih dejavnikov v proizvodnji pokaže, da je/so januarja 2006[1]:

- 33 % zaposlenih (ali 31 % podjetij) omejevalo nezadostno tuje povpraševanje;
- 29 % zaposlenih (ali 40 % podjetij) omejevalo nezadostno domače povpraševanje;
- 20 % zaposlenih (ali 22 % podjetij) omejevalo pomanjkanje usposobljenih delavcev;
- 17 % zaposlenih (ali 18 % podjetij) omejeval konkurenčni uvoz;
- 13 % zaposlenih (ali 10 % podjetij) omejevali drugi dejavniki, npr. nelojalna konkurenca, tečajna politika, pomanjkanje zmogljivosti, visoki stroški dela;
- 10 % zaposlenih (ali 15 % podjetij) omejevale neporavnane obveznosti iz poslovanja;
- 9 % zaposlenih (ali 7 % podjetij) omejevalo pomanjkanje ustrezne opreme;

LIMITS TO PRODUCTION

In January 2006, 29% of employees (31% of enterprises) faced supply difficulties, which is 5 percentage points more than in January 2005 and 4 percentage points above last year's average.

The second most important limits were demand difficulties. In January 2006, 26% of employees (33% of enterprises) faced these limits, which is 1 percentage point more than in January 2005 and equal to last year's average.

In January 2006, 24% of employees (14% of enterprises) faced no limits, which is 1 percentage point more than in January 2005 and 1 percentage point below last year's average.

The third most important limits were severe obstacles. In January 2006, 21% of employees (22% of enterprises) faced these limits, which is 7 percentage points less than in January 2005 and 4 percentage points below last year's average.

A more detailed overview of limits to production shows that in January 2006[1]:

- 33% of employees (or 31% of enterprises) were limited by insufficient foreign demand,
- 29% of employees (or 40% of enterprises) were limited by insufficient domestic demand,
- 20% of employees (or 22% of enterprises) were limited by shortage of skilled labour,
- 17% of employees (or 18% of enterprises) were limited by competitive imports,
- 13% of employees (or 10% of enterprises) were limited by other factors such as unfair competition, exchange-rate policy, lack of capacity, high labour costs,
- 10% of employees (or 15% of enterprises) were limited by problems with unpaid bills,
- 9% of employees (or 7% of enterprises) were limited by lack of appropriate equipment,

[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 in not 100%.

- 8 % zaposlenih (ali 9 % podjetij) imelo težave zaradi negotovih gospodarskih razmer;
- 6 % zaposlenih (ali 8 % podjetij) omejevali finančni problemi, kot so neugodni pogoji kreditiranja, težave pri pridobivanju kreditov itd;
- 6 % zaposlenih (ali 4 % podjetij) omejevalo pomanjkanje surovin;
- 5 % zaposlenih (ali 6 % podjetij) omejevalo pomanjkanje delavcev na splošno;
- 3 % zaposlenih (ali 5 % podjetij) omejevala nejasna gospodarska zakonodaja;
- 1 % zaposlenih (ali 2 % podjetij) omejevalo pomanjkanje polizdelkov.

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

IZKORIŠČENOST ZMOGLJIVOSTI

Januarska povprečna izkoriščenost zmogljivosti je bila 83,3-odstotna oziroma najvišja v celotnem opazovanem obdobju. V primerjavi z oktobrom 2005 je bila višja za 0,4 odstotne točke, v primerjavi z istim mesecem lani za 1,4 odstotne točke in lanskim povprečjem za 1,1 odstotne točke.

USTREZNOST PROIZVODNIH ZMOGLJIVOSTI

Ustreznost proizvodnih zmogljivosti je bila glede na pričakovano povpraševanje v naslednjih dvanajstih mesecih za 2 odstotni točki nižja kot v oktobru 2005 in je s tem dosegla najnižjo vrednost v celotnem opazovanem obdobju. V primerjavi z istim mesecem lani je bila nižja za 7 odstotnih točk in 5 odstotnih točk pod povprečjem lanskega leta.

KONKURENČNI POLOŽAJ

Desezonirana vrednost konkurenčnega položaja podjetij na domačem trgu je bila v primerjavi z oktobrom 2005 višja za 3 odstotne točke. Glede na isti mesec lani je bila višja za 7 odstotnih točk in 4 odstotne točke nad lanskim povprečjem.

Desezonirana vrednost konkurenčnega položaja podjetij na trgih držav članic EU je bila v primerjavi z oktobrom 2005 višja za 3 odstotne točke in je dosegla najvišjo vrednost v celotnem opazovanem obdobju. Glede na isti mesec lani je bila višja za 10 odstotnih točk in 6 odstotnih točk nad lanskim povprečjem.

Desezonirana vrednost konkurenčnega položaja podjetij na trgih zunaj EU je bila v primerjavi z oktobrom 2005 višja za 3 odstotne točke. Glede na isti mesec lani je bila višja za 14 odstotnih točk in za 7 odstotnih točk nad lanskim povprečjem.

Statistično raziskovanje je sofinancirala Evropska komisija. Za objavljene podatke in besedila je odgovoren izključno Statistični urad Republike Slovenije in ne Evropska komisija.

- 8% of employees (or 9% of enterprises) were limited by uncertain economic conditions,
- 6% of employees (or 8% of enterprises) were limited by financial problems such as unfavourable credit terms, difficulties in obtaining credits, etc.,
- 6% of employees (or 4% of enterprises) were limited by shortage of raw materials,
- 5% of employees (or 6% of enterprises) were limited by shortage of labour in general,
- 3% of employees (or 5% of enterprises) were limited by unclear economic legislation,
- 1% of employees (or 2% of enterprises) was limited by shortage of semi-finished products.

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

CAPACITY UTILISATION

In January 2006 the average capacity utilisation was 83.3%, which was 0.4 percentage point higher than in October 2005 and the best result since we started conducting the survey. Compared to January 2005 it was 1.4 percentage point higher and 1.1 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 lower by 2 percentage points compared to October 2005. Compared to January 2005 it was down by 7 percentage points and 5 percentage points below last year's average.

COMPETITIVE POSITION

The seasonally adjusted assessment of competitive position on the domestic market was 3 percentage points higher than in October 2005. It was 7 percentage points higher compared to January 2005 and 4 percentage points above last year's average.

Compared to October 2005, the seasonally adjusted assessment of enterprise's competitive position on markets of the EU Member States was up by 3 percentage points. It was up by 10 percentage points compared to January 2005 and by 6 percentage points compared to last year's average.

Compared to October 2005, the seasonally adjusted assessment of enterprise's competitive position on the markets outside EU was up by 3 percentage points. Compared to January 2005 it was up by 14 percentage points and 7 percentage points above last year's average.

The business survey is co-financed by the European Commission. However, the European Commission accepts no responsibility or liability whatsoever with regard to the material published in this publication.

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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 Križman - Urednica zbirke Statistične informacije Marina Urbas – Področna urednica Brigita Vrabič Kek - Slovensko besedilo jezikovno uredila Marina Urbas - Angleško besedilo jezikovno uredil Boris Panič - Naklada 100 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.

Edited, published and printed by the Statistical Office of the Republic of Slovenia, Ljubljana, Vožarski pot 12 - **These data can be used provided the source is acknowledged** - Director-General Irena Križman - Rapid Reports editor Marina Urbas – Subject-matter editor Brigita Vrabič Kek - Slovene language editor Marina Urbas - English language editor Boris Panič - Total print run 100 copies - ISSN of Rapid Reports 1408-192X - ISSN of subcollection Mining and manufacturing 1408-8908 - Information is given by the Information Centre of the Statistical Office of the Republic of Slovenia, tel.: +386 1 241 51 04 - E-mail: info.stat@gov.si - http://www.stat.si.