



17 RUDARSTVO IN PREDELOVALNE DEJAVNOSTI
MINING AND MANUFACTURING

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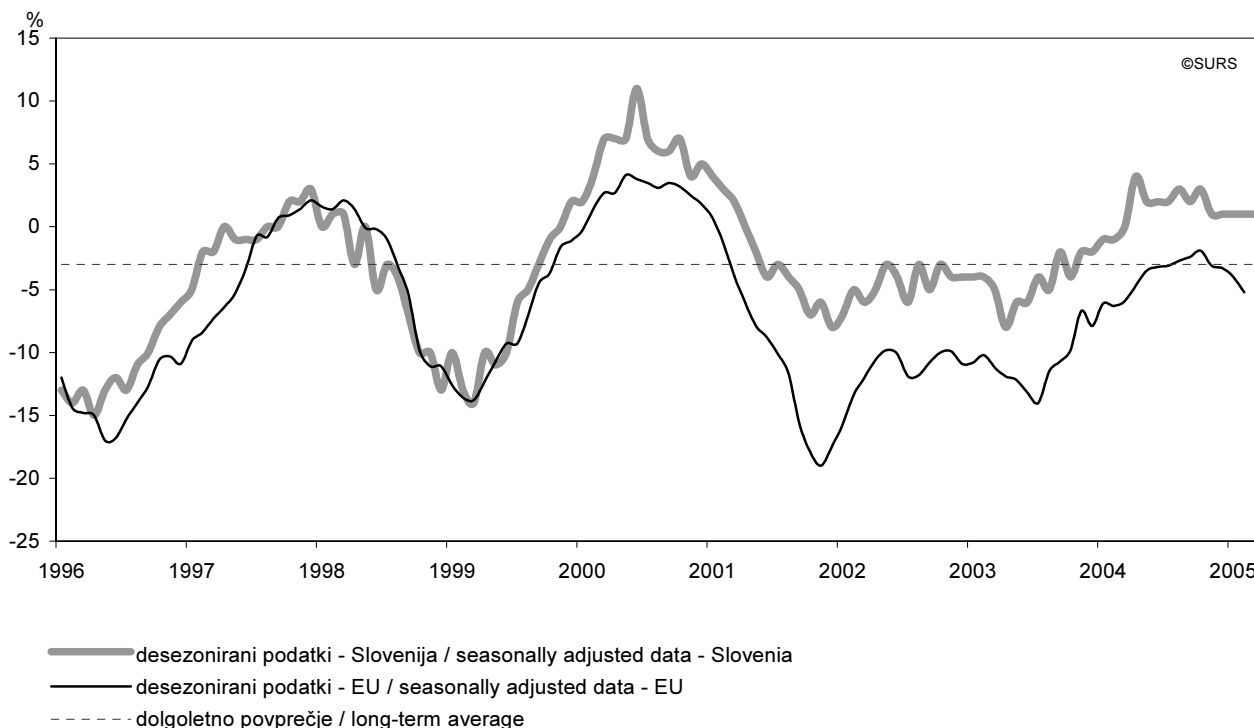
POSLOVNE TENDENCE V PREDELOVALNIH DEJAVNOSTIH, SLOVENIJA, MAREC 2005

BUSINESS TENDENCY IN MANUFACTURING, SLOVENIA, MARCH 2005

- ▶ Desezonirana vrednost kazalca zaupanja je bila v marcu 2005 enaka kot v februarju 2005. V primerjavi z istim mesecem lani je bila ta vrednost za 1 odstotno točko nižja ter za 1 odstotno točko pod lanskim povprečjem.
- ▶ Na gibanje kazalca zaupanja v tem mesecu so vplivala višja proizvodna pričakovanja, zaloge končnih izdelkov in raven skupnih naročil, vendar se je njihovo gibanje ravno izničilo, tako da je vrednost kazalca zaupanja ostala enaka kot pretekli mesec.
- ▶ Kazalci stanj so se v primerjavi s preteklim mesecem večinoma izboljšali. Pričakovanja za naslednje tri mesece, razen pričakovanega skupnega povpraševanja, niso ugodna.
- ▶ In March 2005 the seasonally adjusted confidence indicator in manufacturing was the same as in February 2005. The confidence indicator in manufacturing was down by 1 percentage point compared to March 2004 and last year's average.
- ▶ The evolution of the confidence indicator was influenced by the rise of production expectations, stocks of finished goods and total order books; however, their opposite influence on the confidence indicator caused no change in its value.
- ▶ Observed indicators for appreciation of the situation improved compared to the previous month. The expectations for the next three months are not favourable, with exception of expected total demand.

Slika 1: KAZALEC ZAUPANJA ¹⁾ V SLOVENIJI IN EU ²⁾, JANUAR 1996 - MAREC 2005

Chart 1: CONFIDENCE INDICATOR ¹⁾ IN SLOVENIA AND EU ²⁾, JANUARY 1996 - MARCH 2005



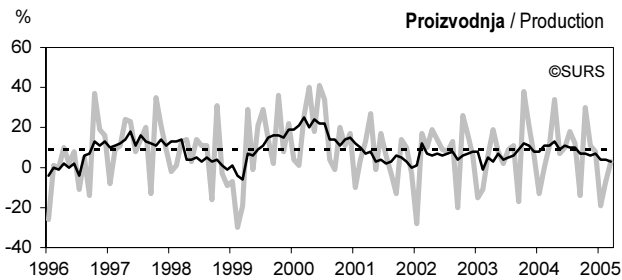
1) Kazalec zaupanja je povprečje odgovorov (ravnotežij) na vprašanja o proizvodnih pričakovanjih, skupnih naročilih in zalogah končnih izdelkov (obrnjen predznak). Podatki so desezonirani. Confidence indicator is an average of responses (balances) to questions on production expectations, total order books and stocks of finished goods (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 zadnji mesec nam niso na voljo./ Data for EU for the last month are not available.

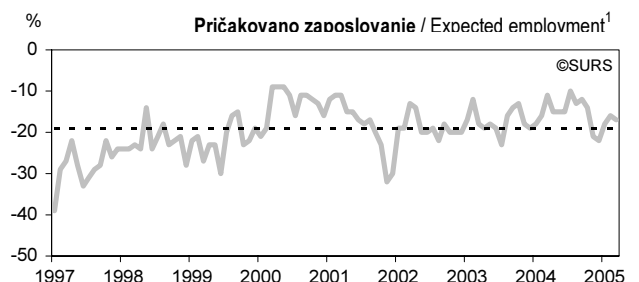
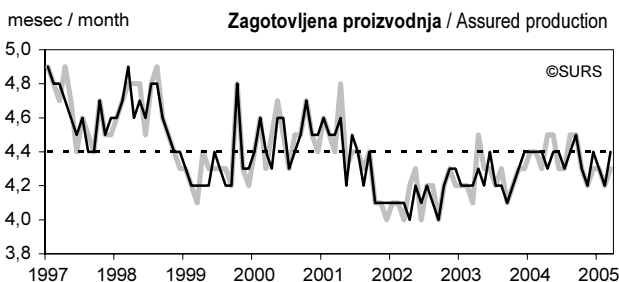
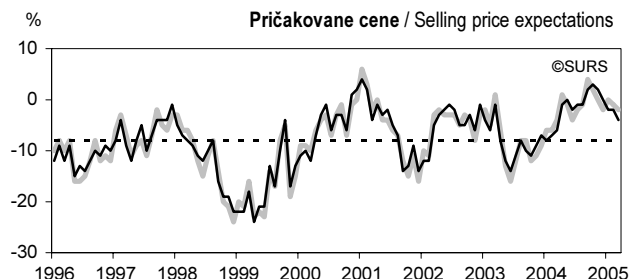
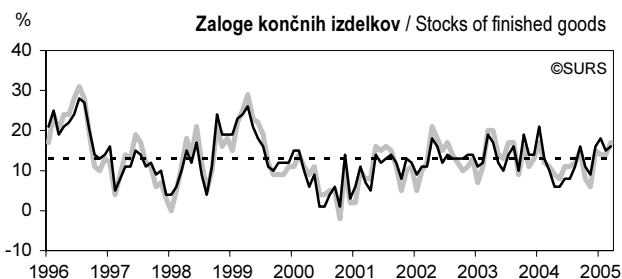
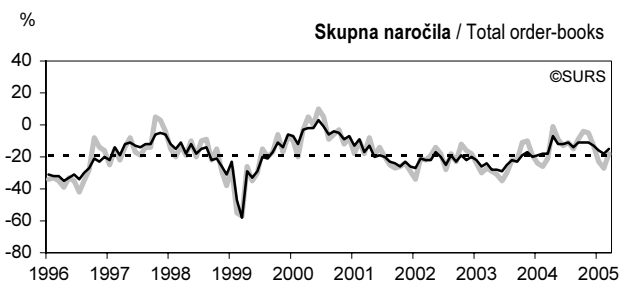
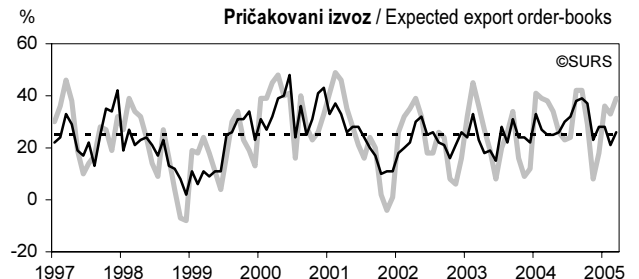
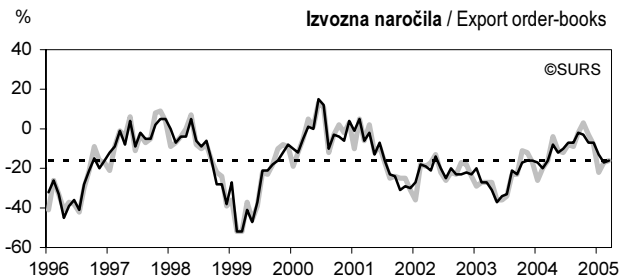
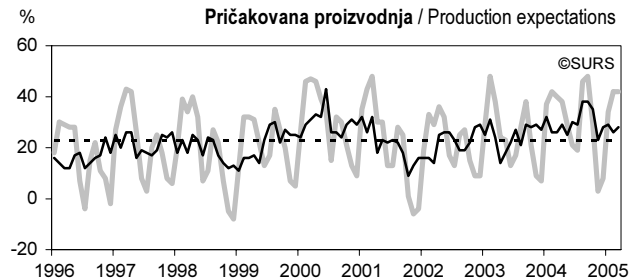
2. GIBANJE EKONOMSKIH KAZALCEV V PREDELOVALNIH DEJAVNOSTIH V SLOVENIJI, JANUAR 1996 - MAREC 2005

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

Ocena stanja Appreciation of situation



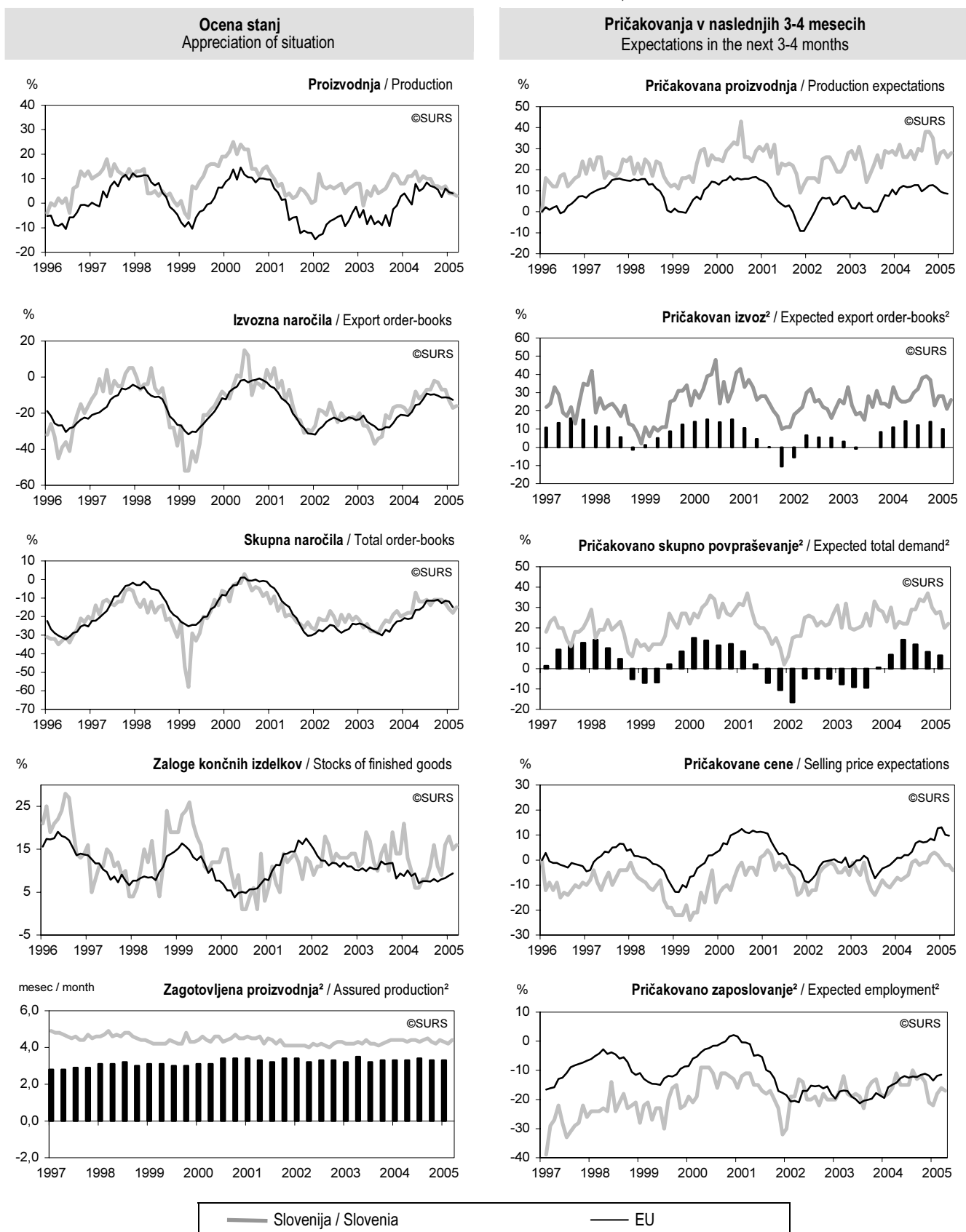
Pričakovanja v naslednjih 3-4 mesecih Expectations in the next 3-4 months



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

1) Sezonska komponenta ni prisotna. / Seasonal component is not included.

3. GIBANJE EKONOMSKIH KAZALCEV V PREDELOVALNIH DEJAVNOSTIH V SLOVENIJI IN EU, JANUAR 1996 - MAREC 2005 ¹⁾
EVOLUTION OF ECONOMIC INDICATORS IN MANUFACTURING IN SLOVENIA AND EU, JANUARY 1996 - MARCH 2005 ¹⁾



1) Vir / Source: http://europa.eu.int/comm/economy_finance/indicators/businessandconsumersurveys_en.htm. Podatki o EU za tekoči mesec nam niso na voljo. Podatki so desezonirani. / Data for current month for EU are not available. Data are seasonally adjusted.

2) 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 vsa velika podjetja, 56 % srednjevelikih (ali 59 % zaposlenih) in 18 % malih podjetij (ali 20 % zaposlenih). Panelni vzorec pokriva 37 % podjetij vzorčnega okvira ali 74 % zaposlenih v predelovalnih dejavnostih.

NAČIN ZBIRANJA PODATKOV

Anketo izvajamo mesečno po pošti, vsako 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 giblje med 3 in 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 (SCA). 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 SCA.

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 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; we include seven more 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 relative importance of individual enterprise in the panel. Inside divisions of Standard Classification of Activities (SCA) 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 DAINTIES, za Slovenijo pa z metodo TRAMO/SEATS, ki temelji na ARIMA modelih. Pri oblikovanju modelov je upoštevano časovno obdobje od maja 1995 do januarja 2005, pri časovnih vrstah pričakovan izvoz, pričakovano skupno povpraševanje in povprečno število mesecev zagotovljene proizvodnje od januarja 1997 do januarja 2005, pri časovni vrsti stopnja izkoriščenosti zmogljivosti od drugega četrtega 1995 do prvega četrtega 2005, pri časovnih vrstah konkurenčni položaj podjetja na domačem trgu, konkurenčni položaj podjetja na trgih držav članic Evropske Unije in konkurenčni položaj podjetja na trgih izven Evropske Unije pa od prvega četrtega 2001 do prvega četrtega 2005. Zaradi narave podatkov se model za leto 2005 razlikuje v primerjavi z modelom za leto 2004 pri skupnih naročilih. Pri časovnih vrstah pričakovano zaposlovanje in stopnja izkoriščenosti zmogljivosti sezonska komponenta ni prisotna.

Kazalec zaupanja je povprečje odgovorov (ravnatežij) 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?

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 May 1995 to January 2005, the series expected export order books, expected total demand and average assured production from January 1997 to January 2005, the series level of capacity utilisation from the second quarter of 1995 to the first quarter of 2005, 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 2005. Because of the nature of data, the model for 2005 differs from the model used in 2004 by total order books. In the time series expected employment and level of capacity utilisation the seasonal component is not included.

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

PUBLISHING

Respondents participating in the survey receive the special information for 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 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 total 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?



- 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?
- Competitive position on the domestic market over the past 3 months: improved, remained unchanged, deteriorated?
- Competitive position on the foreign markets inside the EU over the past 3 months: improved, remained unchanged, deteriorated?
- Competitive position on the markets outside the EU over the past 3 months: improved, remained unchanged, deteriorated?
- New orders over the past 3 months: increased, remain unchanged, decreased?

KOMENTAR

Desezonirana vrednost kazalca zaupanja je bila v marcu enaka kot v februarju 2005. V primerjavi z istim mesecem lani je bila ta vrednost za 1 odstotno točko nižja ter za 1 odstotno točko pod lanskim povprečjem.

PROIZVODNJA in PRIČAKOVANA PROIZVODNJA

Desezonirana vrednost kazalca proizvodnje se je v primerjavi s preteklim mesecem znižala za 1 odstotno točko. Glede na isti mesec lani je bila nižja za 8 odstotnih točk in 6 odstotnih točk pod lanskim povprečjem.

Desezonirana vrednost kazalca proizvodnih pričakovanj za naslednje 3 mesece je bila v primerjavi s preteklim mesecem višja za 2 odstotni točki. V primerjavi z istim mesecem lani je bila višja za 2 odstotni točki in za 2 odstotni točki nižja od lanskega povprečja.

IZVOZNA NAROČILA in PRIČAKOVANI IZVOZ

Desezonirana vrednost kazalca ravni izvoznih naročil je bila v primerjavi s preteklim mesecem višja za 1 odstotno točko. Bila je enaka kot isti mesec lani in za 6 odstotnih točk pod lanskim povprečjem.

Desezonirana vrednost kazalca pričakovanega izvoza za naslednje 3 mesece se je v primerjavi s preteklim mesecem zvišala za 5 odstotnih točk. V primerjavi z istim mesecem lani je bila višja za 1 odstotno točko in 4 odstotne točke pod povprečjem lanskega leta.

SKUPNA NAROČILA in PRIČAKOVANO SKUPNO POVPRŠEVANJE

Desezonirana vrednost kazalca ravni skupnih naročil se je v primerjavi s preteklim mesecem zvišala za 3 odstotne točke. Glede na isti mesec lani je bila višja za 3 odstotne točke in 2 odstotni točki pod povprečjem lanskega leta.

Desezonirana vrednost kazalca pričakovanega skupnega povpraševanja za naslednje 3 mesece je bila za 2 odstotni točki višja kot pretekli mesec. Glede na isti mesec lani je bila nižja za 1 odstotno točko ter od lanskega povprečja pa za 6 odstotnih točk.

ZALOGE KONČNIH IZDELKOV

Desezonirana vrednost kazalca ravni zaloga končnih izdelkov je bila višja za 1 odstotno točko glede na pretekli mesec. Glede na isti mesec lani je bila višja za 6 odstotnih točk in 5 odstotnih točk nad povprečjem lanskega leta.

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 2 odstotni točki in 2 odstotni točki pod povprečjem lanskega leta.

COMMENT

In March 2005 the seasonally adjusted confidence indicator in manufacturing was the same as in February 2005. The confidence indicator in manufacturing was down by 1 percentage point compared to March 2004 and last year's average.

PRODUCTION and PRODUCTION EXPECTATIONS

The seasonally adjusted value of the production indicator fell by 1 percentage point compared to the previous month. Compared to March 2004 it was down by 8 percentage points and 6 percentage points below last year's average.

The seasonally adjusted value of production expectations for the next three months rose by 2 percentage points compared to the previous month. Compared to March 2004 it was up by 2 percentage points and compared to last year's average down by 2 percentage points.

EXPORT ORDER BOOKS and EXPECTED EXPORT ORDER BOOKS

The seasonally adjusted value of the export order books indicator was up by 1 percentage point compared to the previous month. It was the same as in March 2004 and down by 6 percentage points compared to last year's average.

The seasonally adjusted value of expected export in the next three months rose by 5 percentage points compared to the previous month. Compared to March 2004 it was up by 1 percentage point and 4 percentage points below last year's average.

TOTAL ORDER BOOKS and EXPECTED TOTAL DEMAND

The seasonally adjusted value of the overall order books indicator rose by 3 percentage points compared to the previous month. Compared to March 2004 it was up by 3 percentage points and down by 2 percentage points compared to last year's average.

The seasonally adjusted value of expected total demand for the next three months rose by 2 percentage points compared to the previous month. Compared to March 2004 and last year's average it was down by 1 and 6 percentage points respectively.

STOCKS OF FINISHED GOODS

The seasonally adjusted value of the stocks of finished products indicator rose by 1 percentage points compared to the previous month. Compared to March 2004 it was up by 6 percentage points and compared to last year's average up by 5 percentage points.

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 March 2004 it was up by 2 percentage points and down by 2 percentage points compared to last year's average.



ZAGOTOVLJENA PROIZVODNJA

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

Največ podjetij (18,8 %) ima proizvodnjo zagotovljeno v povprečju za več kot 10 mesecev. Sledijo podjetja (18,3 %), ki imajo proizvodnjo zagotovljeno v povprečju za 2 meseca, in podjetja (17,4 %), ki imajo proizvodnjo zagotovljeno v povprečju za 3 mesece. Za pol meseca ima zagotovljeno proizvodnjo v povprečju 7,1 % podjetij, ob marčevskem proizvodnem ritmu pa nima zagotovljene proizvodnje v povprečju 2,4 % podjetij.

PRIČAKOVANO ZAPOSLOVANJE

Vrednost kazalca pričakovanih glede zaposlovanja v naslednjih 3 mesecih je bila za 1 odstotno točko nižja kot pretekli mesec. V primerjavi z istim mesecem lani je bila nižja za 6 odstotnih točk in 2 odstotni točki pod povprečjem lanskega leta.

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

ASSURED PRODUCTION

With the same production rhythm as in March 2005, production in enterprises is assured on average for the next 4.4 months. This is the same as in March last year and as last year's average.

In most enterprises (18.8%) production is assured for more than ten months. They are followed by enterprises whose production is assured for two months (18.3%) and those whose production is assured for three months (17.4%). Should the March production rhythm continue, 7.1% of enterprises have production assured for half a month while 2.4% of enterprises have no assured production.

EXPECTED EMPLOYMENT

The value of expected employment for the next three months slid by 1 percentage point compared to the previous month. Compared to March 2004 it was down by 6 percentage points and compared to last year's average by 2 percentage points.

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 document.

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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 Krizman - Urednica zbirke Statistične informacije Marina Urbas - Slovensko besedilo jezikovno uredila 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>

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 Krizman - Rapid Reports editor Marina Urbas - Slovene language editor Joža Lakovič - English language editor Boris Panič - Total print run 105 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>