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# POSLOVNE TENDENCE

## BUSINESS TENDENCY

**April 2019**  
April 2019

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# POSLOVNE TENDENCE V PREDELOVALNIH DEJAVNOSTIH

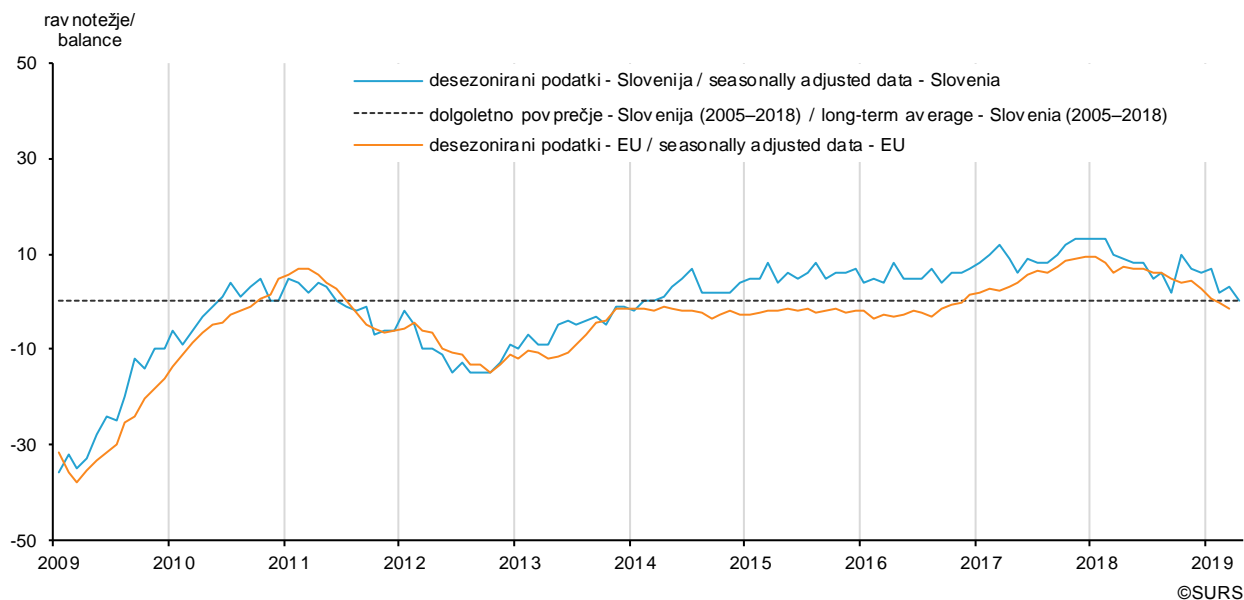
## BUSINESS TENDENCY IN MANUFACTURING

### 1 KAZALNIK ZAUPANJA V PREDELOVALNIH DEJAVNOSTIH

#### CONFIDENCE INDICATOR IN MANUFACTURING

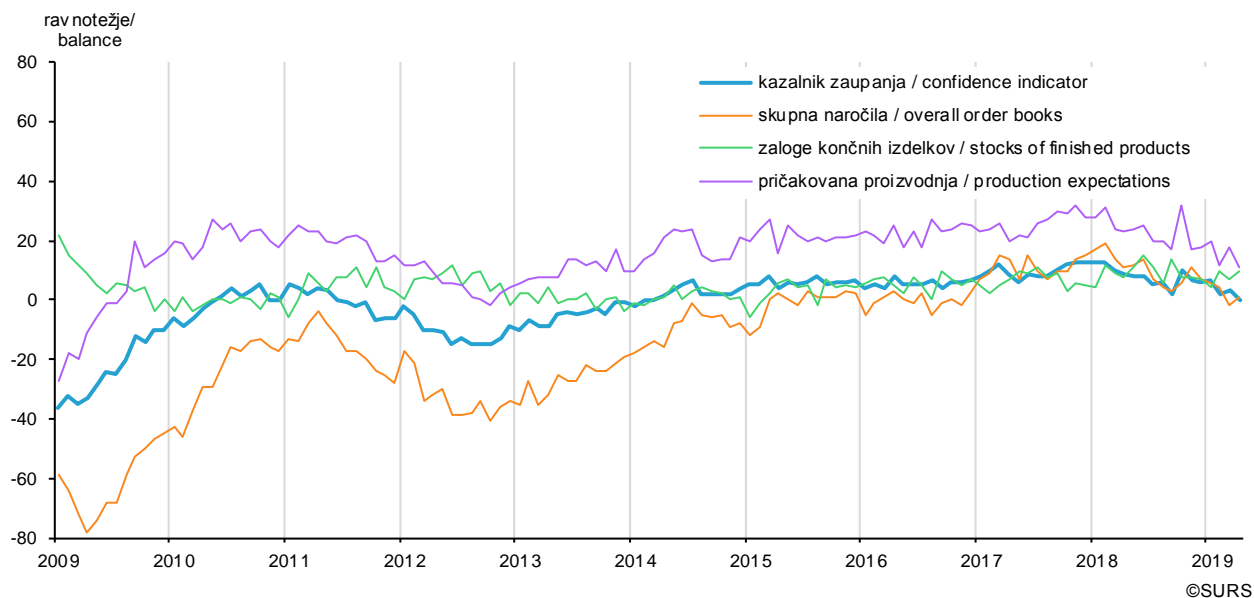
#### 1.1 KAZALNIK ZAUPANJA V PREDELOVALNIH DEJAVNOSTIH V SLOVENIJI IN EU<sup>1)</sup>

##### CONFIDENCE INDICATOR IN MANUFACTURING IN SLOVENIA AND EU<sup>1)</sup>



#### 1.2 KOMPONENTE KAZALNIKA ZAUPANJA V PREDELOVALNIH DEJAVNOSTIH, SLOVENIJA

##### COMPONENTS OF CONFIDENCE INDICATOR IN MANUFACTURING, SLOVENIA

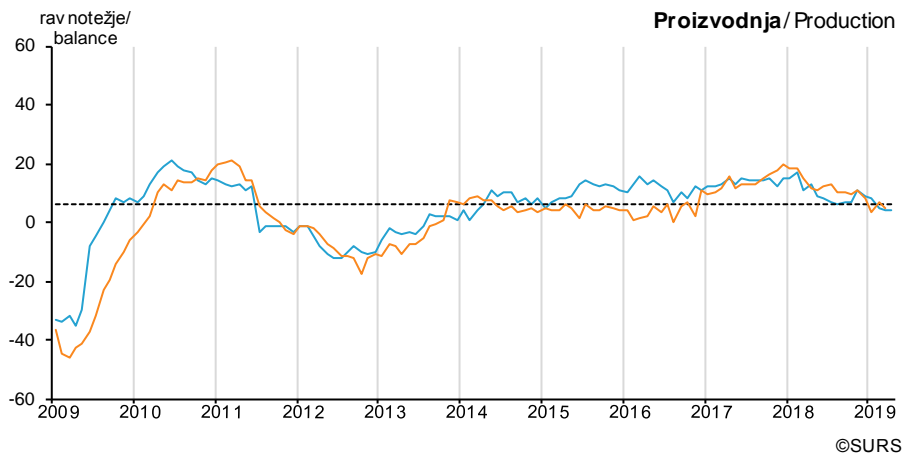


1) Vir: [http://ec.europa.eu/economy\\_finance/db\\_indicators/surveys/time\\_series/index\\_en.htm](http://ec.europa.eu/economy_finance/db_indicators/surveys/time_series/index_en.htm), okrog 5. v mesecu. Podatki za EU za zadnji mesec niso na voljo.

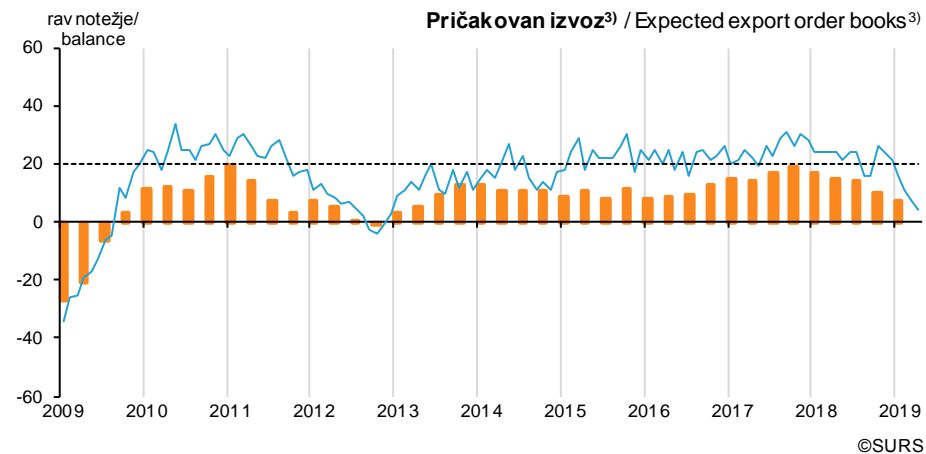
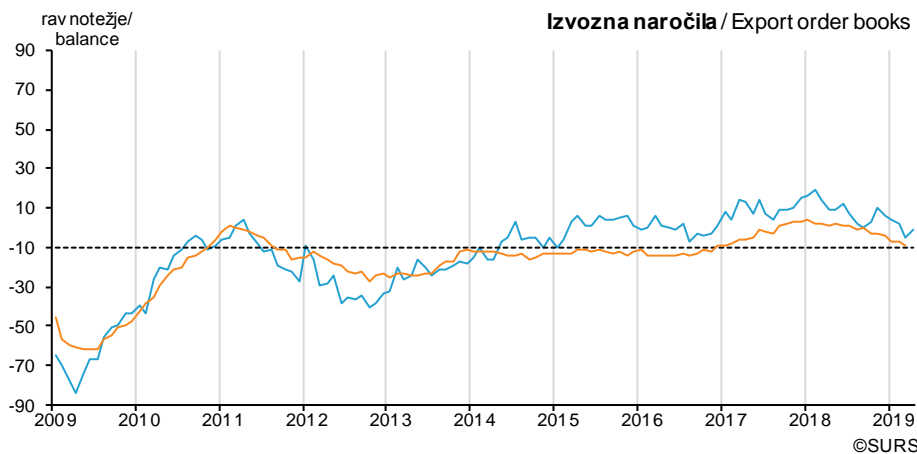
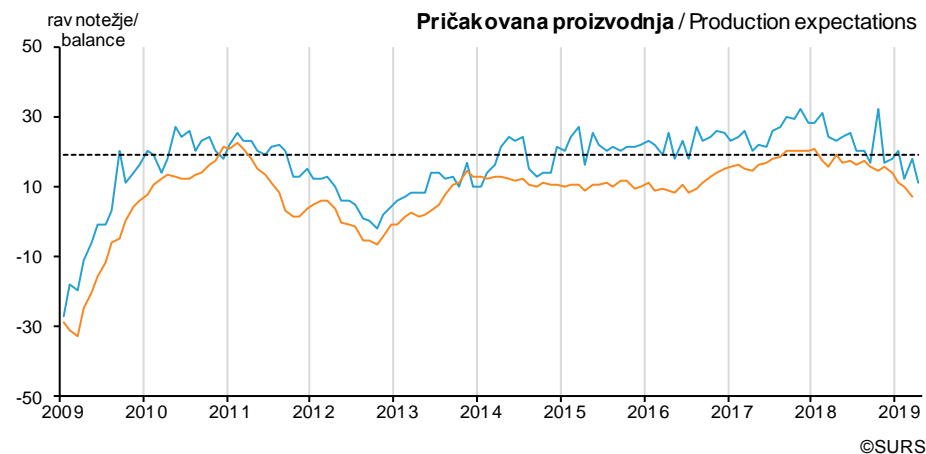
Source: [http://ec.europa.eu/economy\\_finance/db\\_indicators/surveys/time\\_series/index\\_en.htm](http://ec.europa.eu/economy_finance/db_indicators/surveys/time_series/index_en.htm), around 5th of the month. Data for EU for the last month are not available.

## 2 GIBANJE EKONOMSKIH KAZALNIKOV V PREDELOVALNIH DEJAVNOSTIH V SLOVENIJI IN EU<sup>1)</sup> EVOLUTION OF ECONOMIC INDICATORS IN MANUFACTURING IN SLOVENIA AND EU<sup>1)</sup>

**Ocena stanja**  
Appreciation of situation



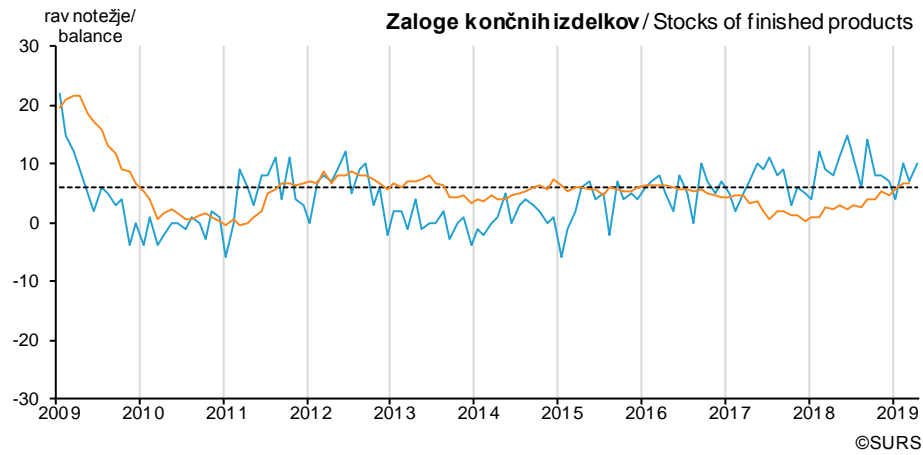
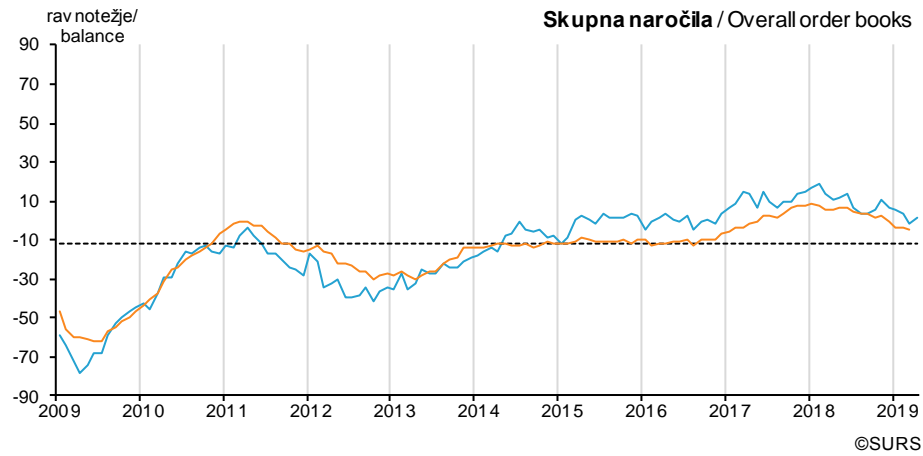
**Pričakovanja v naslednjih 3 mesecih**  
Expectations in the next 3 months



— desezonirani podatki Slovenija / seasonally adjusted data Slovenia  
— desezonirani podatki EU / seasonally adjusted data EU

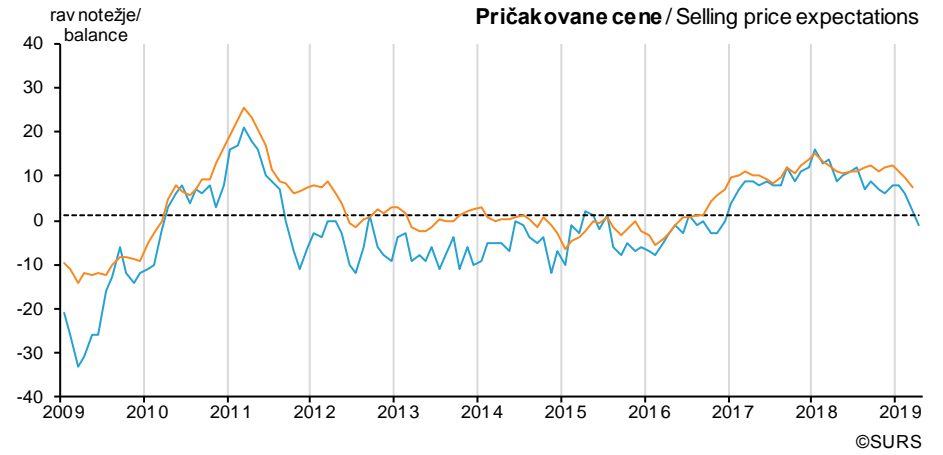
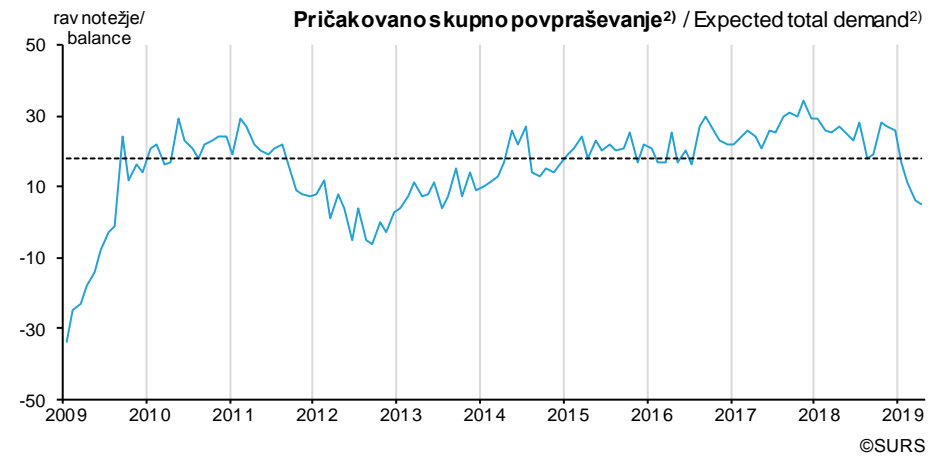
- - - dolgoletno povprečje Slovenija (2005–2018) / long-term average Slovenia (2005–2018)

**Ocena stanja**  
Appreciation of situation



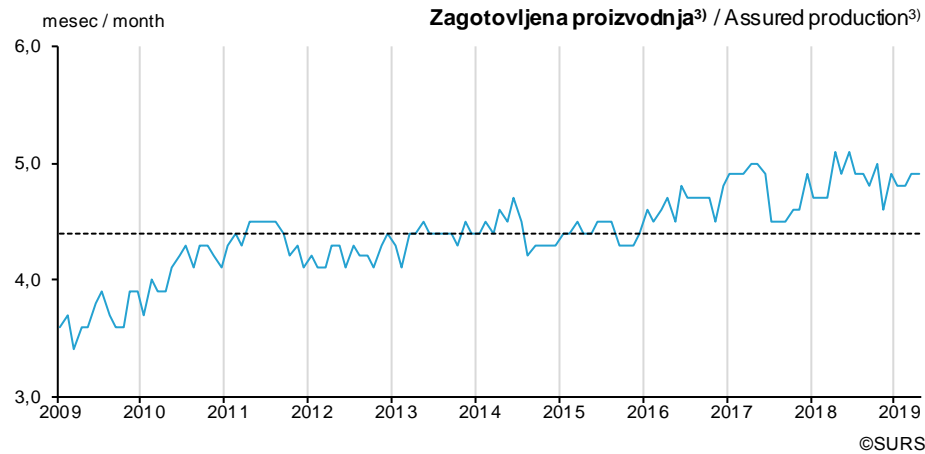
— desezonirani podatki Slovenija / seasonally adjusted data Slovenia  
— desezonirani podatki EU / seasonally adjusted data EU

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



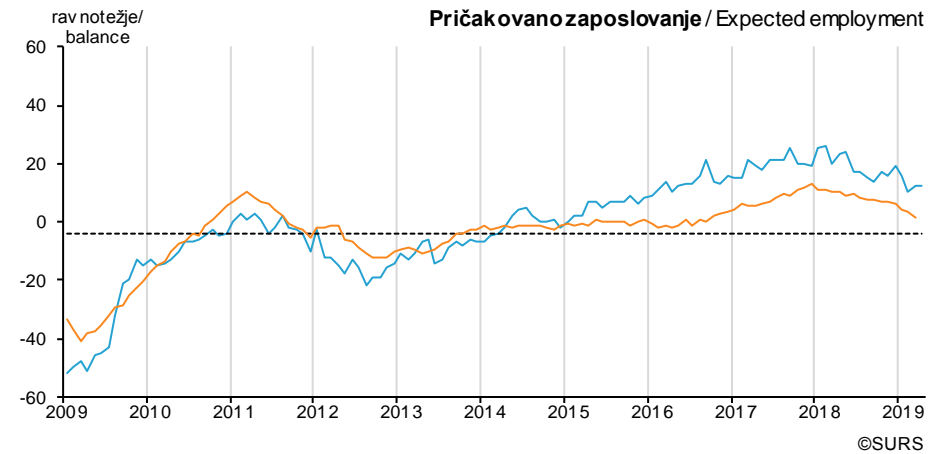
--- dolgoletno povprečje Slovenija (2005–2018) / long-term average Slovenia (2005–2018)

**Ocena stanj**  
Appreciation of situation



— desezonirani podatki Slovenija / seasonally adjusted data Slovenia  
— desezonirani podatki EU / seasonally adjusted data EU

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



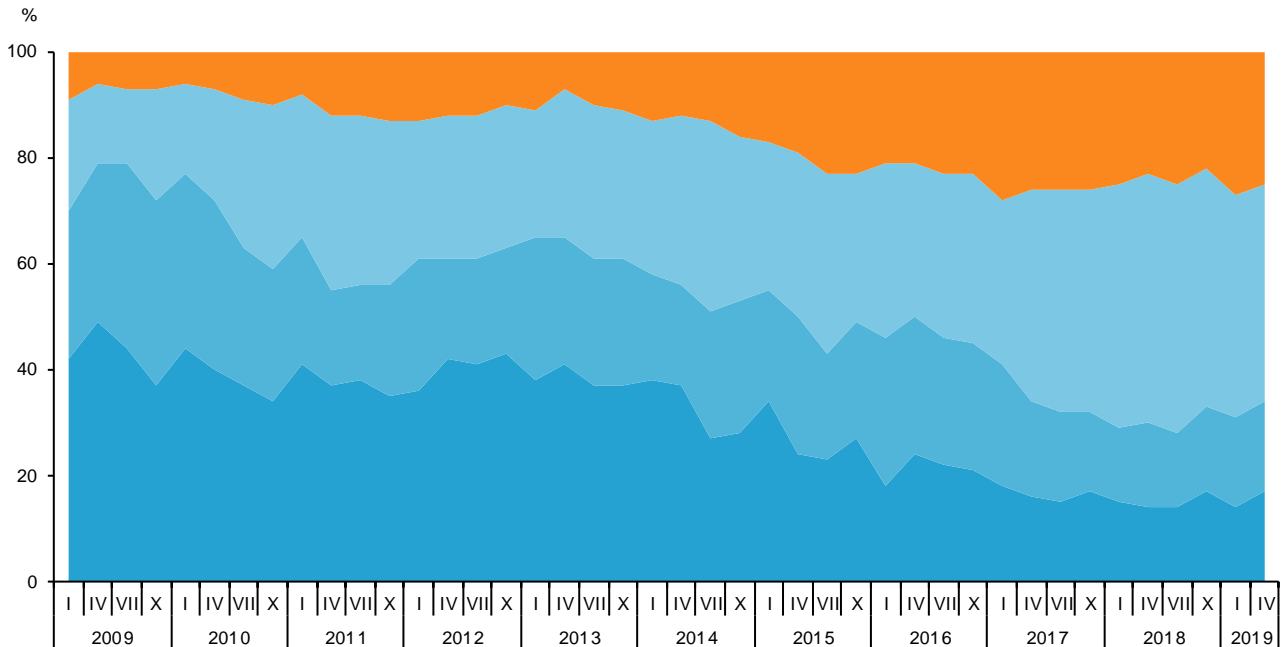
— — — dolgoletno povprečje Slovenija (2005–2018) / long-term average Slovenia (2005–2018)

- 1) Vir: [http://ec.europa.eu/economy\\_finance/db\\_indicators/surveys/time\\_series/index\\_en.htm](http://ec.europa.eu/economy_finance/db_indicators/surveys/time_series/index_en.htm), okrog 5. v mesecu. Podatki za EU za zadnji mesec niso na voljo.  
Source: [http://ec.europa.eu/economy\\_finance/db\\_indicators/surveys/time\\_series/index\\_en.htm](http://ec.europa.eu/economy_finance/db_indicators/surveys/time_series/index_en.htm), around 5th of the month. Data for EU for the last month are not available.
- 2) Podatki za EU niso na voljo. / Data for EU are not available.
- 3) Kazalnik opazujejo v EU vsake tri mesece. / In the EU the indicator is observed every three months.

### 3 GIBANJE EKONOMSKIH KAZALNIKOV V PREDELOVALNIH DEJAVNOSTIH V SLOVENIJI IN EU – ČETRTLETNI PODATKI

#### EVOLUTION OF ECONOMIC INDICATORS IN MANUFACTURING IN SLOVENIA AND EU – QUARTERLY DATA

#### 3.1 OMEJITVE V PROIZVODNJI V SLOVENIJI FACTORS LIMITING PRODUCTION IN SLOVENIA



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- hude omejitve / severe limitations
- težave s povpraševanjem / demand difficulties
- težave s preskrbo / supply difficulties
- ni omejitev / no limits

Graf o omejitvah v proizvodnji prikazuje delež podjetij, ki se soočajo z naslednjimi skupinami omejitev:

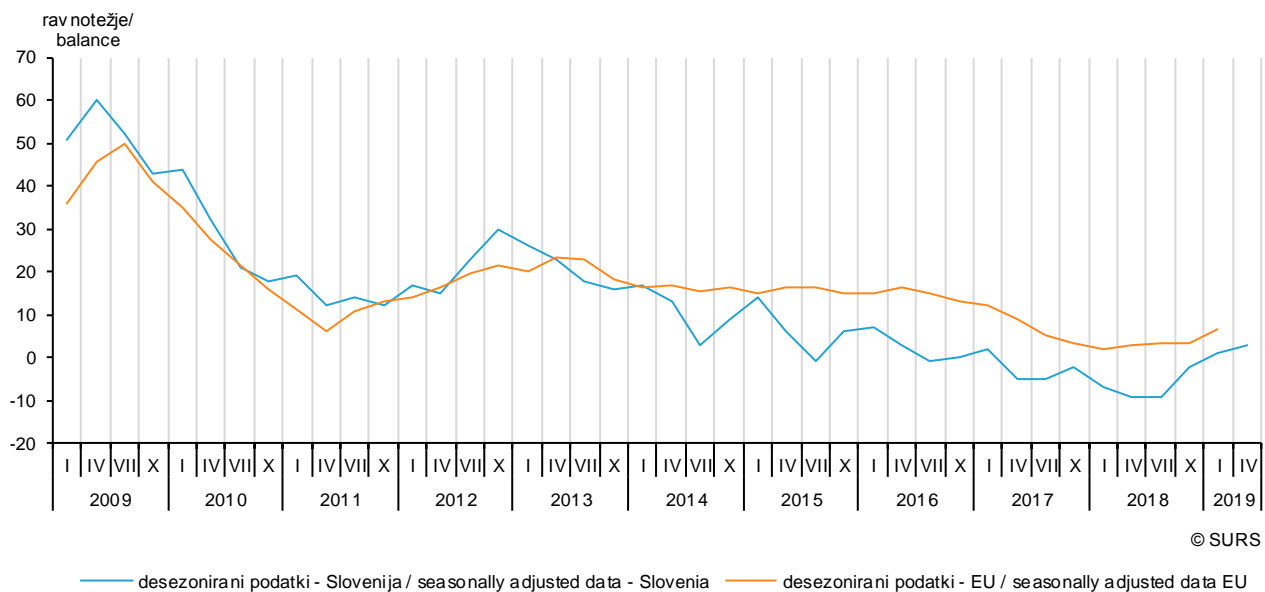
- Skupina "**hude omejitve**" zajema podjetja, ki imajo hkrati težave s povpraševanjem in preskrbo.
- Skupina "**težave s povpraševanjem**" zajema podjetja, ki imajo težave vsaj z enim od dejavnikov: nezadostno domače povpraševanje, nezadostno tuje povpraševanje ali konkurenčen uvoz.
- Skupina "**težave s preskrbo**" zajema podjetja, ki imajo težave vsaj z enim od dejavnikov: pomanjkanje delavcev na splošno/usposobljenih delavcev, surovin, polizdelkov, ustrezne opreme, nepravilne obveznosti iz poslovanja, finančni problemi, nejasna gospodarska zakonodaja ali negotove gospodarske razmere.
- Skupina "**ni omejitev**" zajema podjetja, ki nimajo težav pri proizvodnji.

The chart on factors limiting production shows the share of enterprises faced with the following groups of limitations:

- Group "**severe limitations**" includes enterprises faced with both demand and supply difficulties.
- Group "**demand difficulties**" includes enterprises faced with at least one of the limiting factors: insufficient domestic demand, insufficient foreign demand or competitive imports.
- Group "**supply difficulties**" includes enterprises faced with at least one of the limiting factors: shortage of labour in general/of skilled labour, of raw materials, of semifinished products, lack of appropriate equipment, problems with unpaid bills, financial problems, unclear economic legislation or unclear economic conditions.
- Group "**no limits**" includes enterprises with no limits to production.

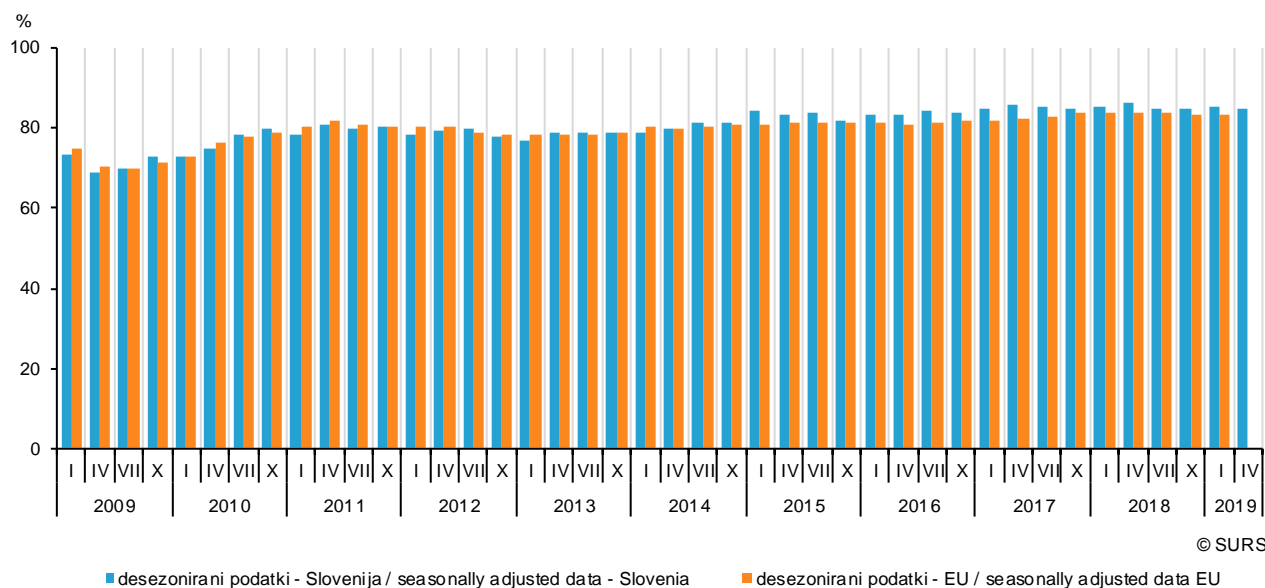
### 3.2 USTREZNOST PROIZVODNIH ZMOGLJIVOSTI GLEDE NA PRIČAKOVANO POVRAŠEVANJE V NASLEDNJIH 12 MESECIH, SLOVENIJA IN EU<sup>1)</sup>

ASSESSMENT OF CURRENT PRODUCTION CAPACITIES ACCORDING TO EXPECTED DEMAND IN THE NEXT 12 MONTHS, SLOVENIA AND EU<sup>1)</sup>



### 3.3 IZKORIŠČENOST PROIZVODNIH ZMOGLJIVOSTI V SLOVENIJI IN V EU<sup>1)</sup>

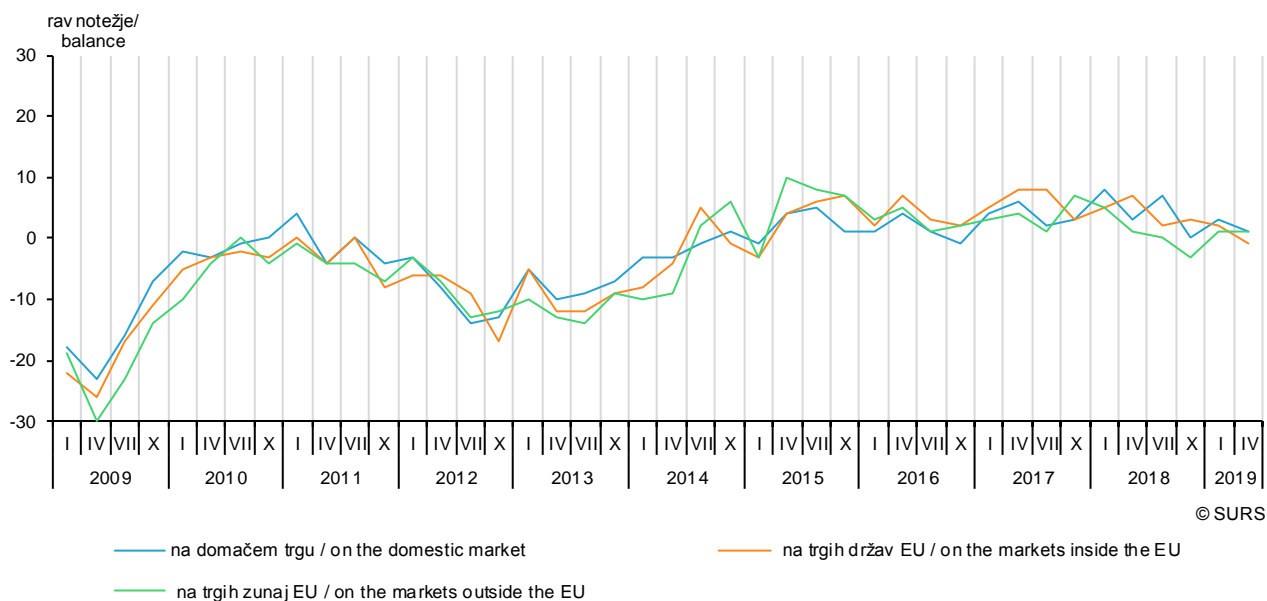
CURRENT CAPACITY UTILISATION IN SLOVENIA AND EU<sup>1)</sup>





### 3.4 KONKURENČNI POLOŽAJ NA DOMAČEM TRGU, TRGIH DRŽAV ČLANIC EU IN TRGIH ZUNAJ EU

#### COMPETITIVE POSITION ON THE DOMESTIC MARKET, FOREIGN MARKET INSIDE THE EU AND OUTSIDE THE EU



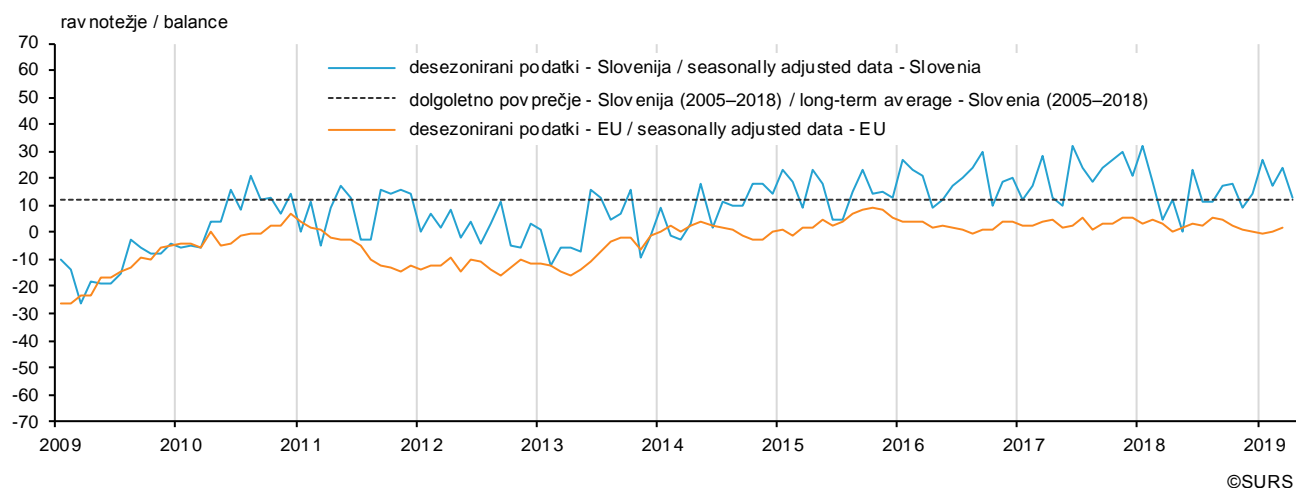
1) Vir: [http://ec.europa.eu/economy\\_finance/db\\_indicators/surveys/time\\_series/index\\_en.htm](http://ec.europa.eu/economy_finance/db_indicators/surveys/time_series/index_en.htm), okrog 5. v mesecu. Podatki za EU za zadnji mesec niso na voljo.

Source: [http://ec.europa.eu/economy\\_finance/db\\_indicators/surveys/time\\_series/index\\_en.htm](http://ec.europa.eu/economy_finance/db_indicators/surveys/time_series/index_en.htm), around 5th of the month. Data for EU for the last month are not available.

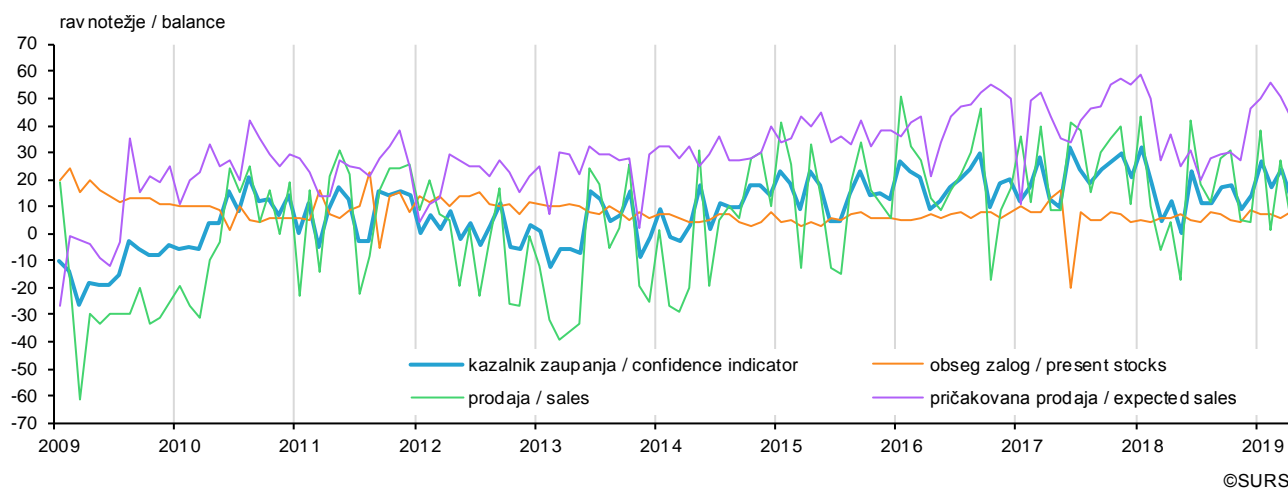
## POSLOVNE TENDENCE V TRGOVINI NA DROBNO BUSINESS TENDENCY SURVEY IN RETAIL TRADE

### 4 KAZALNIK ZAUPANJA V TRGOVINI NA DROBNO CONFIDENCE INDICATOR IN RETAIL TRADE

#### 4.1 KAZALNIK ZAUPANJA V TRGOVINI NA DROBNO V SLOVENIJI IN EU<sup>1)</sup> CONFIDENCE INDICATOR IN RETAIL TRADE IN SLOVENIA AND EU<sup>1)</sup>



#### 4.2 KOMPONENTE KAZALNIKA ZAUPANJA V TRGOVINI NA DROBNO, SLOVENIJA COMPONENTS OF CONFIDENCE INDICATOR IN RETAIL TRADE, SLOVENIA

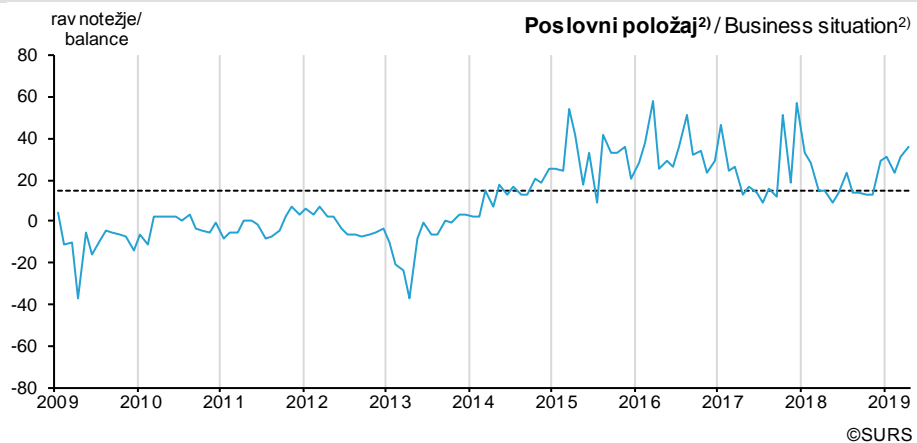


1) Vir: [http://ec.europa.eu/economy\\_finance/db\\_indicators/surveys/time\\_series/index\\_en.htm](http://ec.europa.eu/economy_finance/db_indicators/surveys/time_series/index_en.htm), okrog 5. v mesecu. Podatki za EU za zadnji mesec niso na voljo.

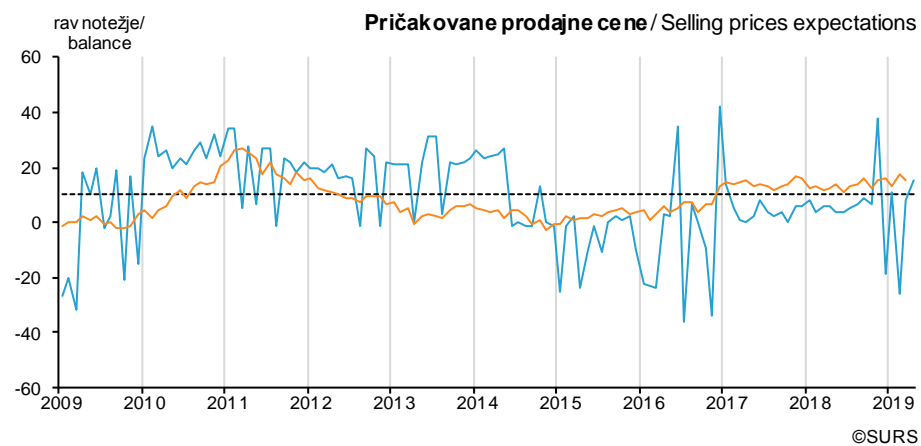
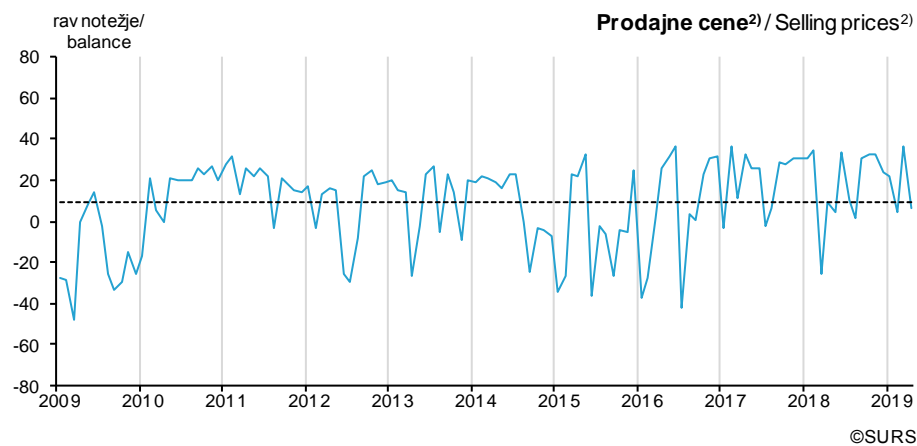
Source: [http://ec.europa.eu/economy\\_finance/db\\_indicators/surveys/time\\_series/index\\_en.htm](http://ec.europa.eu/economy_finance/db_indicators/surveys/time_series/index_en.htm), around 5th of the month. Data for EU for the last month are not available.

## 5 GIBANJE EKONOMSKIH KAZALNIKOV V TRGOVINI NA DROBNO V SLOVENIJI IN EU<sup>1)</sup> EVOLUTION OF ECONOMIC INDICATORS IN RETAIL TRADE IN SLOVENIA AND EU<sup>1)</sup>

**Ocena stanja**  
Appreciation of situation



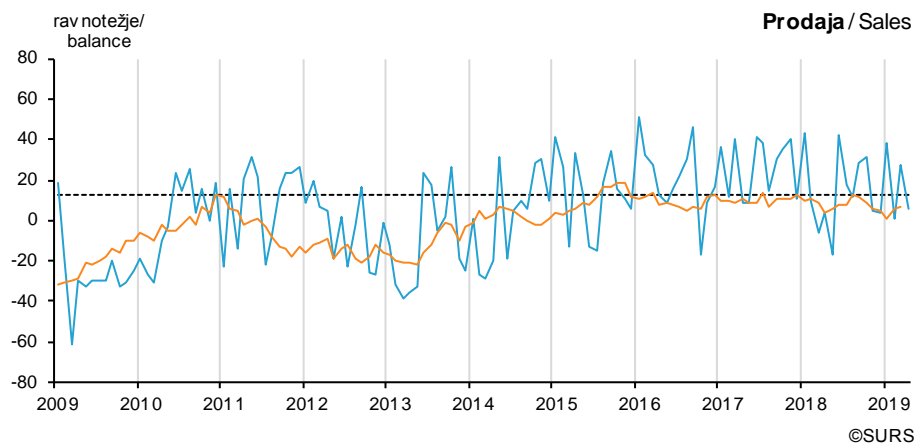
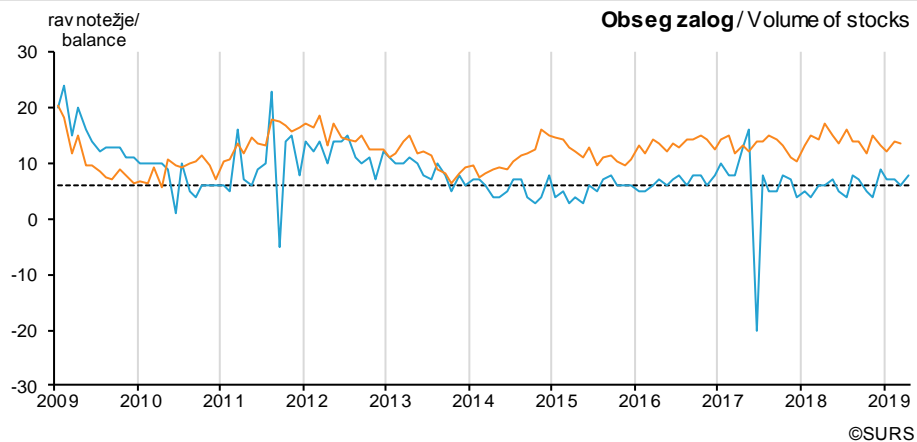
**Pričakovanja v naslednjih 3 mesecih**  
Expectations in the next 3 months



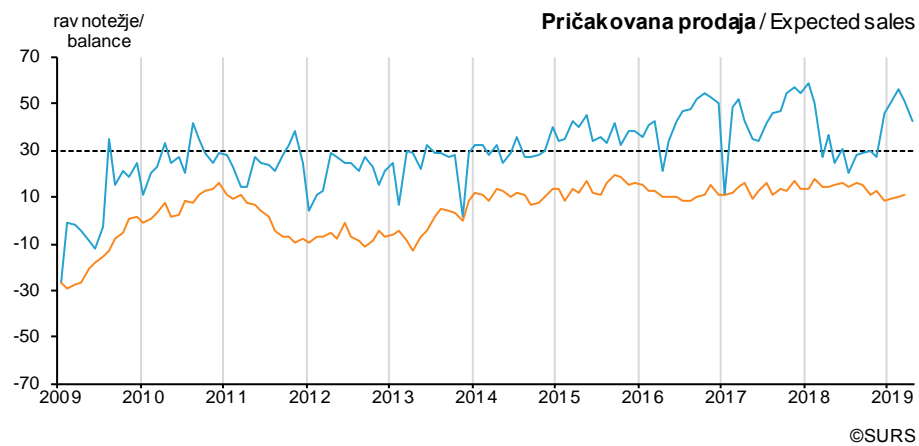
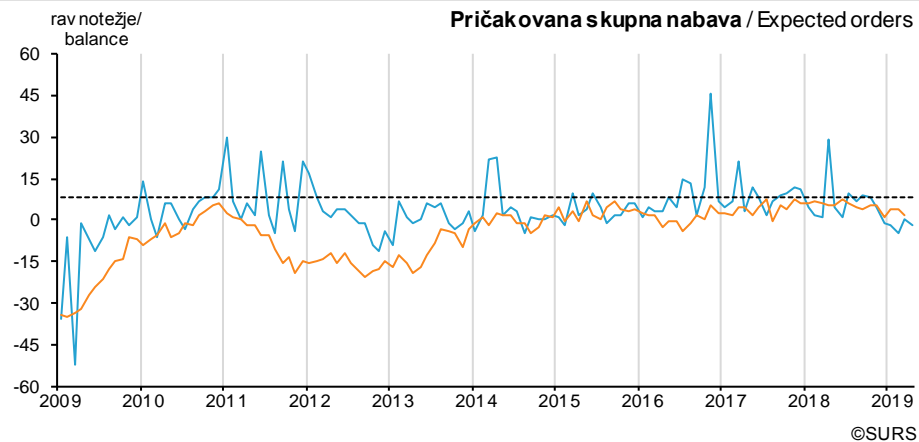
— desezonirani podatki Slovenija / seasonally adjusted data Slovenia  
— desezonirani podatki EU / seasonally adjusted data EU

- - - dolgoletno povprečje Slovenija (2005–2018) / long-term average Slovenia (2005–2018)

**Ocena stanj**  
Appreciation of situation



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

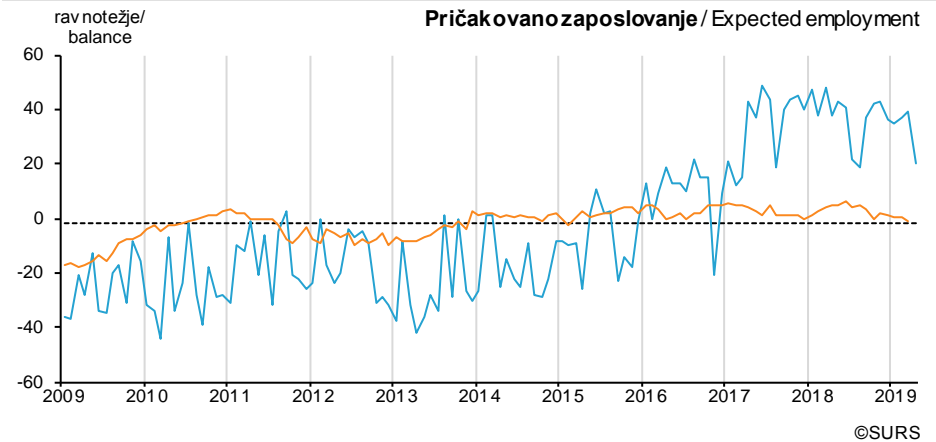


— desezonirani podatki Slovenija / seasonally adjusted data Slovenia  
— desezonirani podatki EU / seasonally adjusted data EU

- - - dolgoletno povprečje Slovenija (2005–2018) / long-term average Slovenia (2005–2018)

### Pričakovanja v naslednjih 3 mesecih

Expectations in the next 3 months

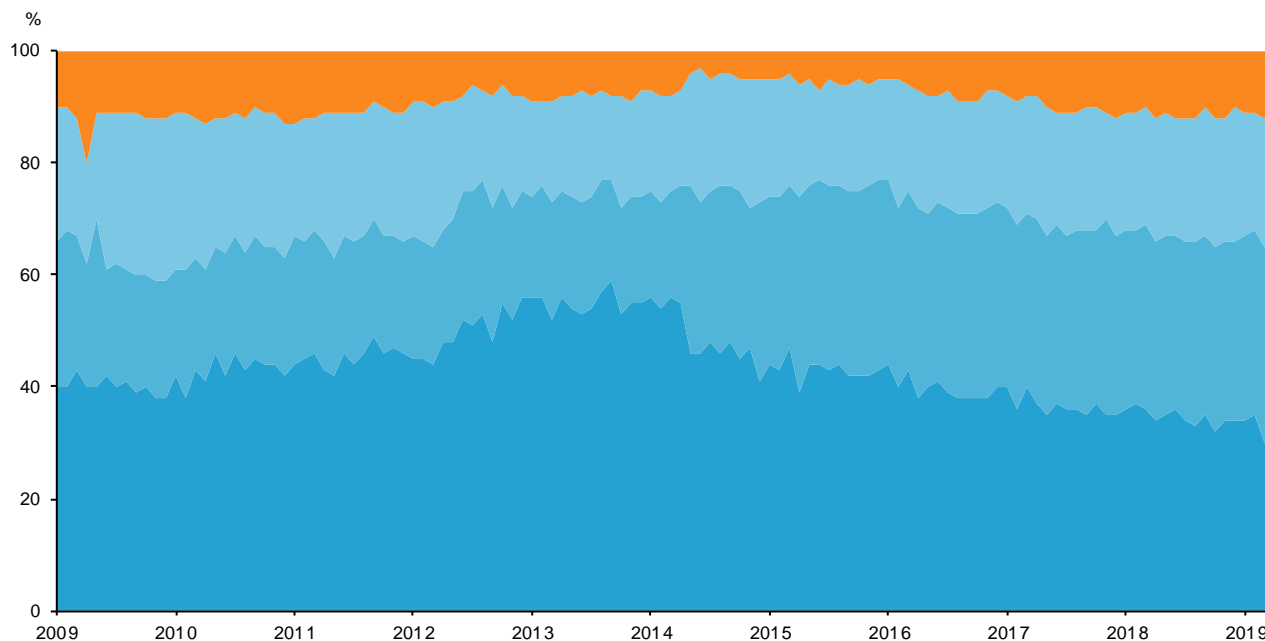


— desezonirani podatki Slovenija / seasonally adjusted data Slovenia  
— desezonirani podatki EU / seasonally adjusted data EU

· · · · · dolgoletno povprečje Slovenija (2005–2018) / long-term average Slovenia (2005–2018)

- 1) Vir: [http://ec.europa.eu/economy\\_finance/db\\_indicators/surveys/time\\_series/index\\_en.htm](http://ec.europa.eu/economy_finance/db_indicators/surveys/time_series/index_en.htm), okrog 5. v mesecu. Podatki za EU za zadnji mesec niso na voljo.  
Source: [http://ec.europa.eu/economy\\_finance/db\\_indicators/surveys/time\\_series/index\\_en.htm](http://ec.europa.eu/economy_finance/db_indicators/surveys/time_series/index_en.htm), around 5th of the month. Data for EU for the last month are not available.
- 2) Podatki za EU niso na voljo. / Data for EU are not available.

## 6 OMEJITVENI DEJAVNIKI V TRGOVINI NA DROBNO V SLOVENIJI FACTORS LIMITING RETAIL TRADE IN SLOVENIA



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- hude omejitve / severe limitations
  - težave s ponudbo / supply difficulties
- težave s povpraševanjem / demand difficulties
  - ni omejitev / no limits

Graf o omejitvah v trgovini na drobno prikazuje delež podjetij, ki se soočajo z naslednjimi skupinami omejitev:

- Skupina "**hude omejitve**" zajema podjetja, ki imajo hkrati težave s povpraševanjem in ponudbo.
- Skupina "**težave s povpraševanjem**" zajema podjetja, ki imajo težave vsaj z enim od dejavnikov: nizko povpraševanje ali konkurenca v sektorju.
- Skupina "**težave s ponudbo**" zajema podjetja, ki imajo težave vsaj z enim od dejavnikov: slaba ponudba, visoki stroški dela, visoka cena denarja, težka dostopnost do bančnih kreditov, premajhna prodajna površina ali premajhni skladiščni prostori.
- Skupina "**ni omejitev**" zajema podjetja, ki nimajo težav pri prodaji.

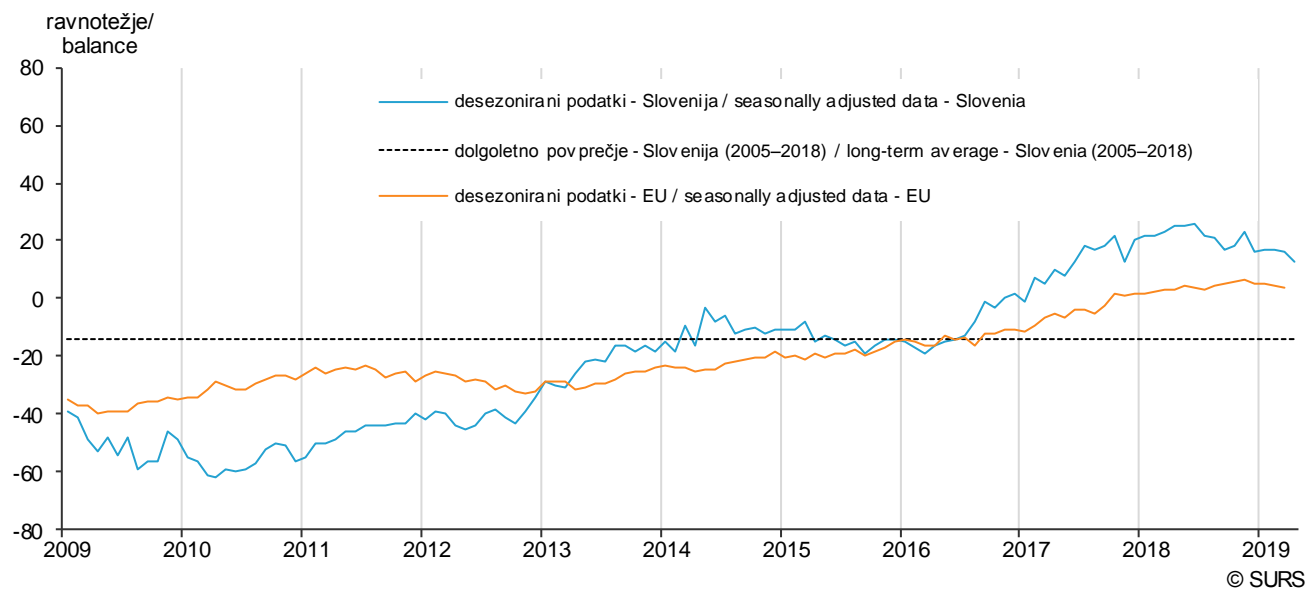
The chart on factors limiting retail trade shows the share of enterprises faced with the following groups of limitations:

- Group "**severe limitations**" includes enterprises faced with both demand and supply difficulties.
- Group "**demand difficulties**" includes enterprises faced with at least one of the limiting factors: low demand or competition in their own sector.
- Group "**supply difficulties**" includes enterprises faced with at least one of the limiting factors: shortage of supply, high cost of labour, high cost of money, access to bank credits, shortage of sales surface or small storage capacity.
- Group "**no limits**" includes enterprises with no limits to retail.

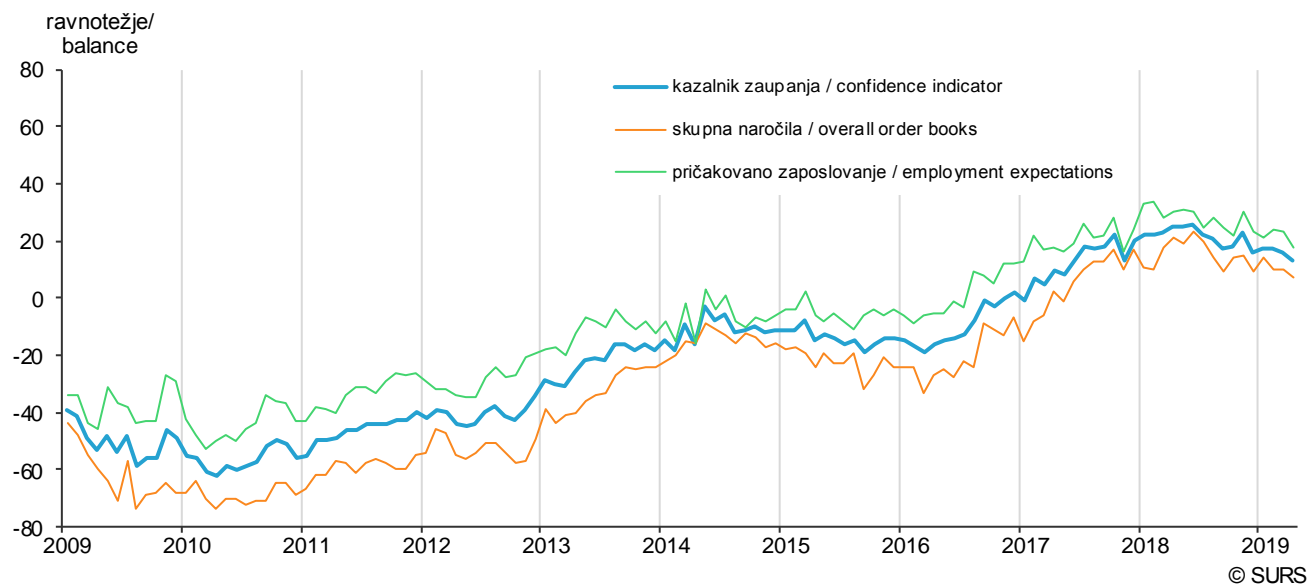
## POSLOVNE TENDENCE V GRADBENIŠTVU BUSINESS TENDENCY IN CONSTRUCTION

### 7 KAZALNIK ZAUPANJA V GRADBENIŠTVU CONSTRUCTION CONFIDENCE INDICATOR

#### 7.1 KAZALNIK ZAUPANJA V GRADBENIŠTVU V SLOVENIJI IN EU<sup>1)</sup> CONSTRUCTION CONFIDENCE INDICATOR IN SLOVENIA AND EU<sup>1)</sup>



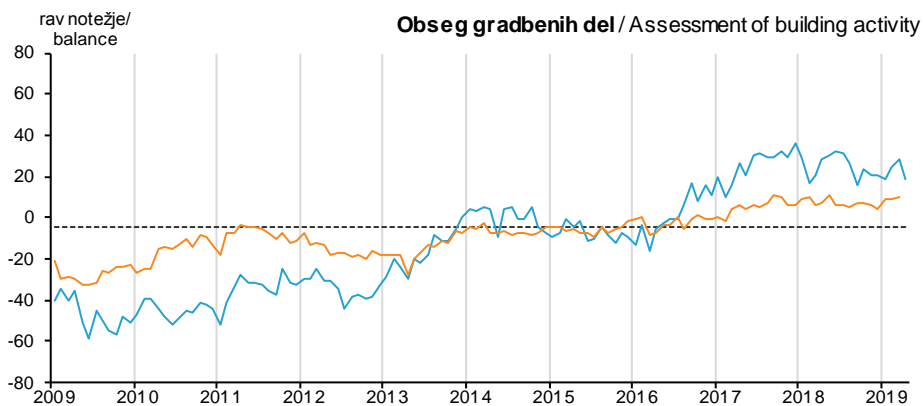
#### 7.2 KOMPONENTE KAZALNIKA ZAUPANJA V GRADBENIŠTVU, SLOVENIJA COMPONENTS OF CONSTRUCTION CONFIDENCE INDICATOR, SLOVENIA



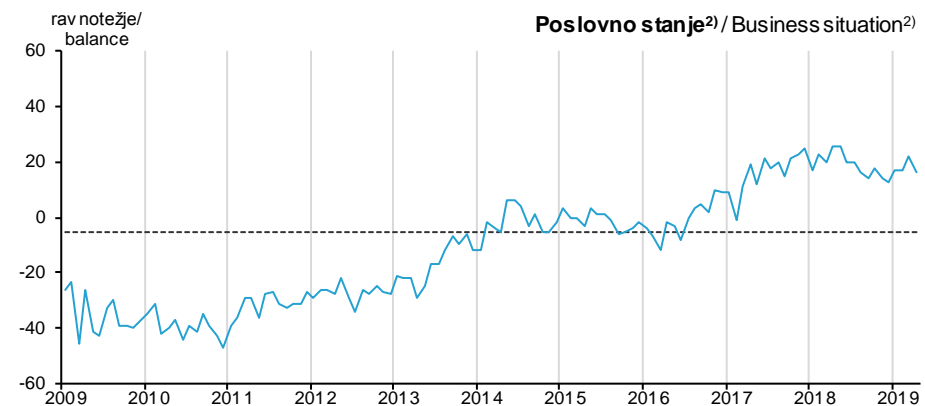
1) Vir: [http://ec.europa.eu/economy\\_finance/db\\_indicators/surveys/time\\_series/index\\_en.htm](http://ec.europa.eu/economy_finance/db_indicators/surveys/time_series/index_en.htm), okrog 5. v mesecu. Podatki za EU za zadnji mesec niso na voljo.

Source: [http://ec.europa.eu/economy\\_finance/db\\_indicators/surveys/time\\_series/index\\_en.htm](http://ec.europa.eu/economy_finance/db_indicators/surveys/time_series/index_en.htm), around 5th of the month. Data for EU for the last month are not available.

## 8 GIBANJE EKONOMSKIH KAZALNIKOV V GRADBENIŠTVU V SLOVENIJI IN EU<sup>1)</sup> EVOLUTION OF ECONOMIC INDICATORS IN CONSTRUCTION IN SLOVENIA AND EU<sup>1)</sup>



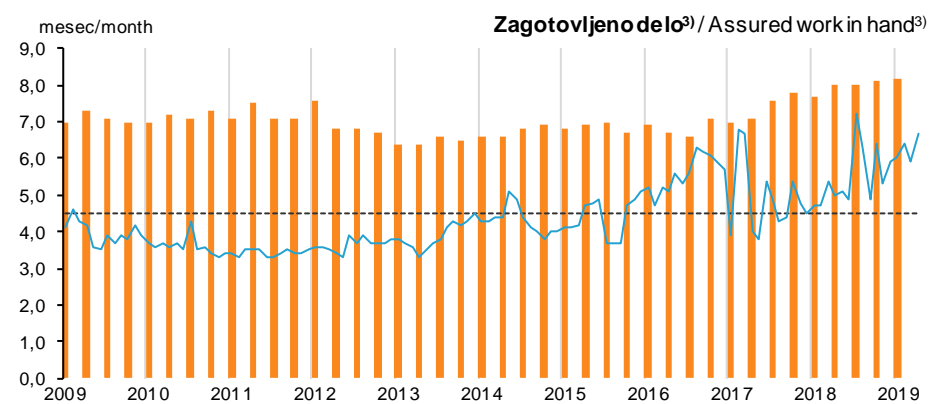
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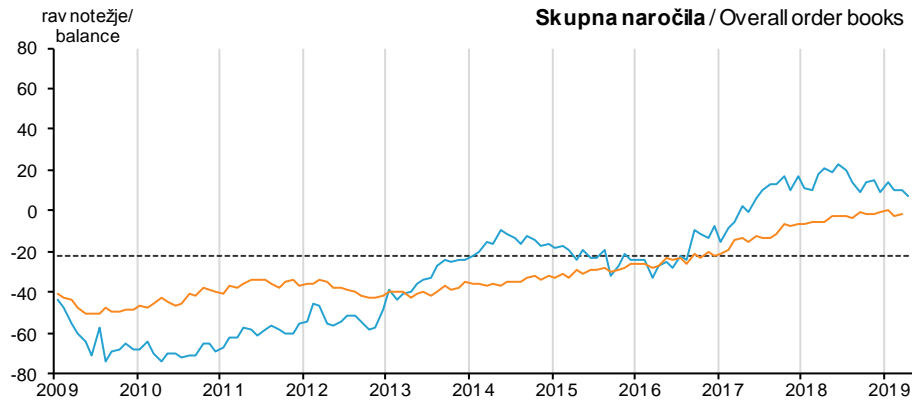
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— desezonirani podatki Slovenija / seasonally adjusted data Slovenia  
— desezonirani podatki EU / seasonally adjusted data EU

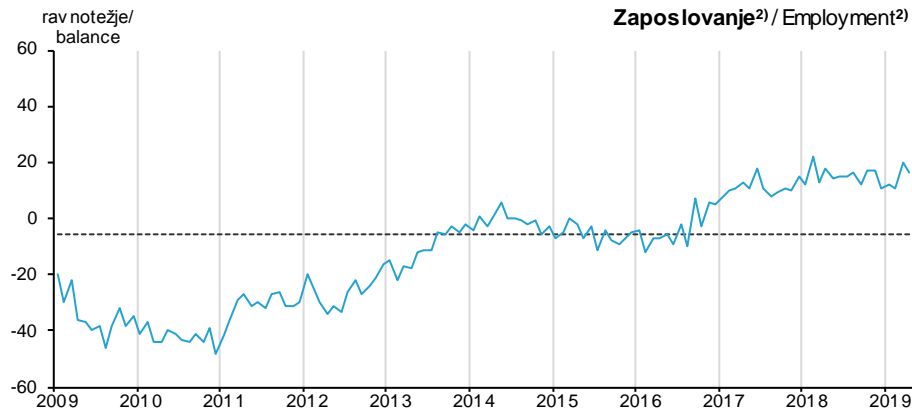
--- dolgoletno povprečje Slovenija (2005–2018) / long-term average Slovenia (2005–2018)



**Ocena stanj**  
Appreciation of situation



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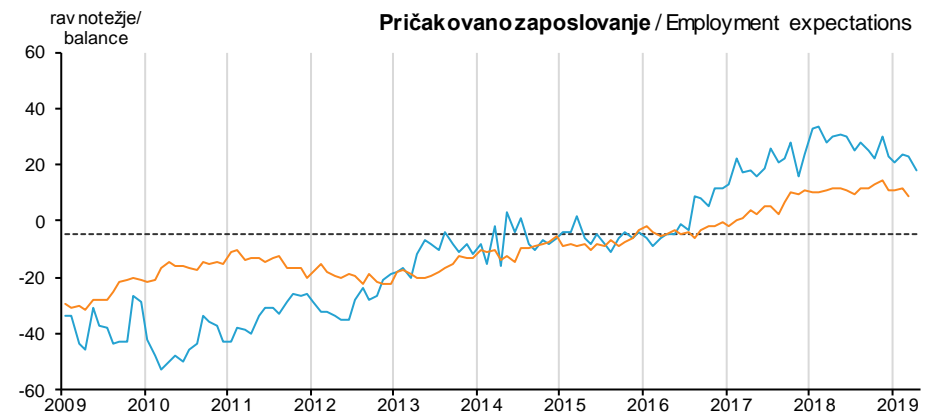
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— desezonirani podatki Slovenija / seasonally adjusted data Slovenia  
— desezonirani podatki EU / seasonally adjusted data EU

**Pričakovanja v naslednjih 3 mesecih**  
Expectations over the next 3 months



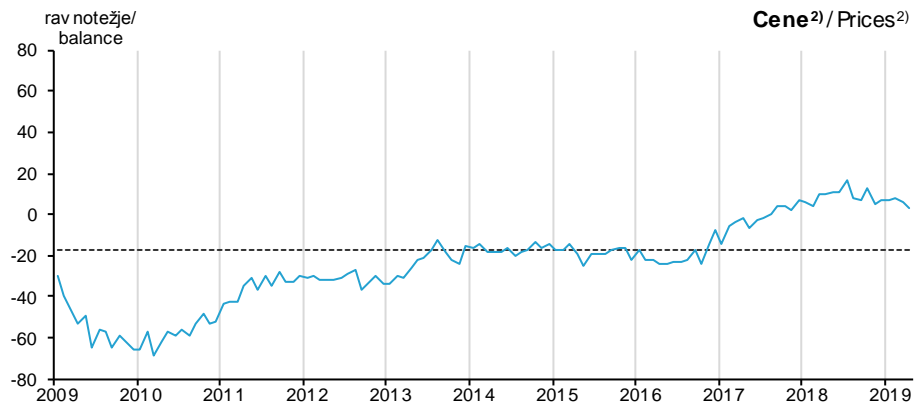
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--- dolgoletno povprečje Slovenija (2005–2018) / long-term average Slovenia (2005–2018)

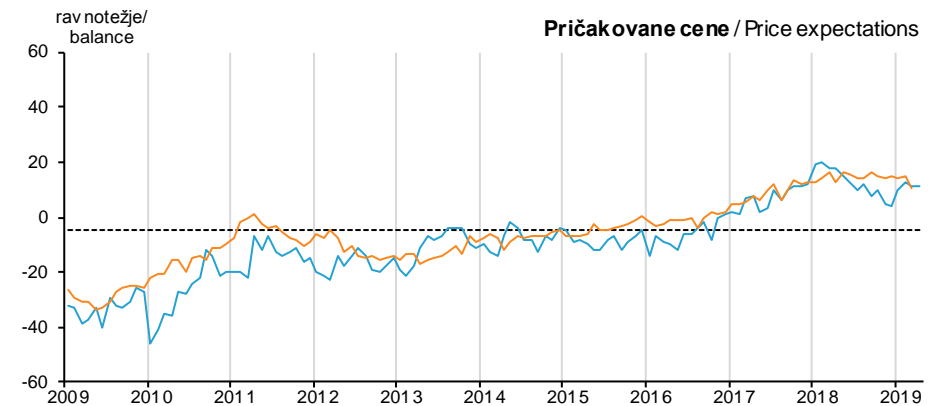
**Ocena stanja**  
Appreciation of situation



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- desezonirani podatki Slovenija / seasonally adjusted data Slovenia
- desezonirani podatki EU / seasonally adjusted data EU

**Pričakovanja v naslednjih 3 mesecih**  
Expectations over the next 3 months

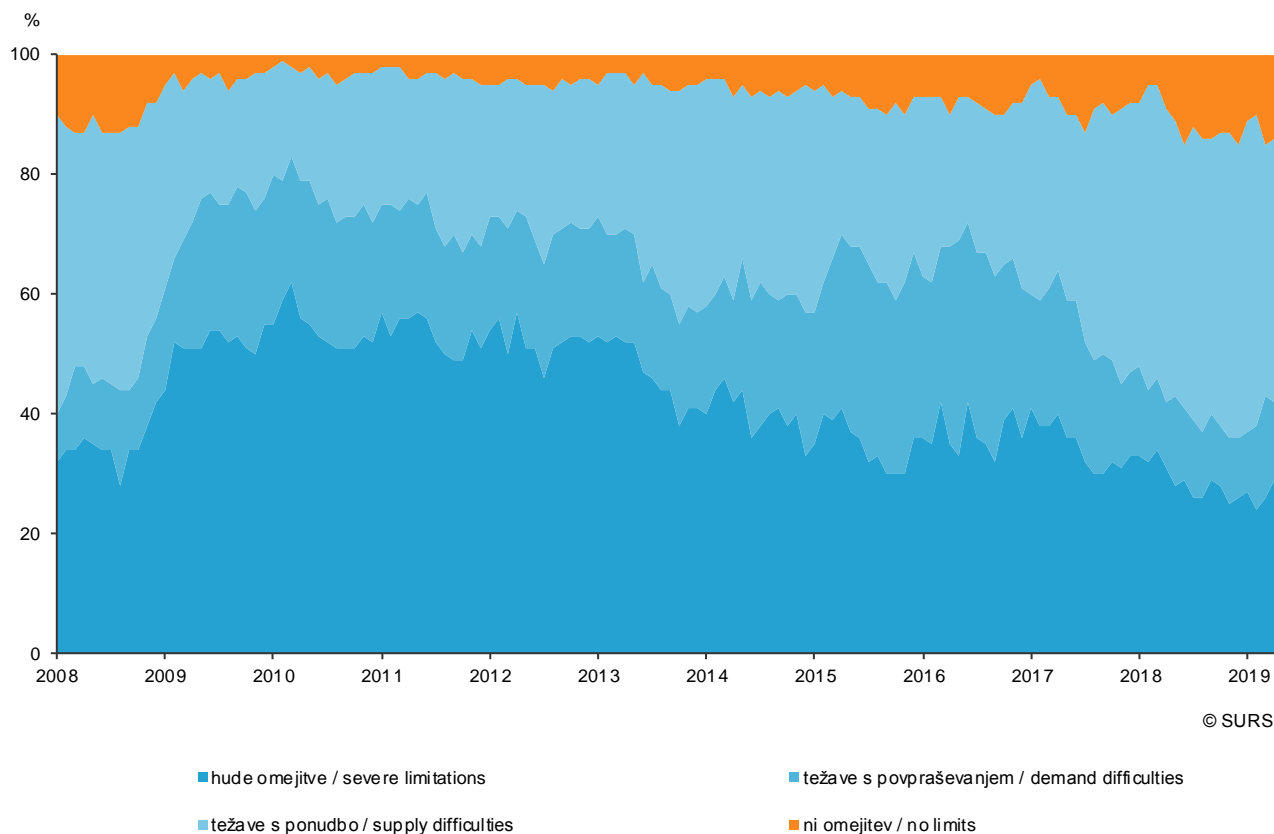


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- - - dolgoletno povprečje Slovenija (2005–2018) / long-term average Slovenia (2005–2018)

- 1) Vir: [http://ec.europa.eu/economy\\_finance/db\\_indicators/surveys/time\\_series/index\\_en.htm](http://ec.europa.eu/economy_finance/db_indicators/surveys/time_series/index_en.htm), okrog 5. v mesecu. Podatki za EU za zadnji mesec niso na voljo.  
Source: [http://ec.europa.eu/economy\\_finance/db\\_indicators/surveys/time\\_series/index\\_en.htm](http://ec.europa.eu/economy_finance/db_indicators/surveys/time_series/index_en.htm), around 5th of the month. Data for EU for the last month are not available.
- 2) Podatki za EU niso na voljo. / Data for EU are not available.
- 3) Kazalnik opazujejo v EU vsake tri mesece. / In the EU the indicator is observed every three months.

## 9 OMEJITVENI DEJAVNIKI V GRADBENIŠTVU V SLOVENIJI FACTORS LIMITING BUILDING ACTIVITY IN SLOVENIA



Graf o omejitvah v gradbeništvu prikazuje delež podjetij, ki se soočajo z naslednjimi skupinami omejitev:

- Skupina "**hude omejitve**" zajema podjetja, ki imajo hkrati težave s povpraševanjem in ponudbo.
- Skupina "**težave s povpraševanjem**" zajema podjetja, ki imajo težave vsaj z enim od dejavnikov: nezadostno povpraševanje ali velika konkurenca v dejavnosti.
- Skupina "**težave s ponudbo**" zajema podjetja, ki imajo težave vsaj z enim od dejavnikov: slabi vremenski pogoji, visoki stroški materiala, dela, visoki finančni stroški, težave pri pridobivanju kreditov, pomanjkanje usposobljenih delavcev, opreme ali materialov.
- Skupina "**ni omejitev**" zajema podjetja, ki nimajo težav pri gradbeni dejavnosti.

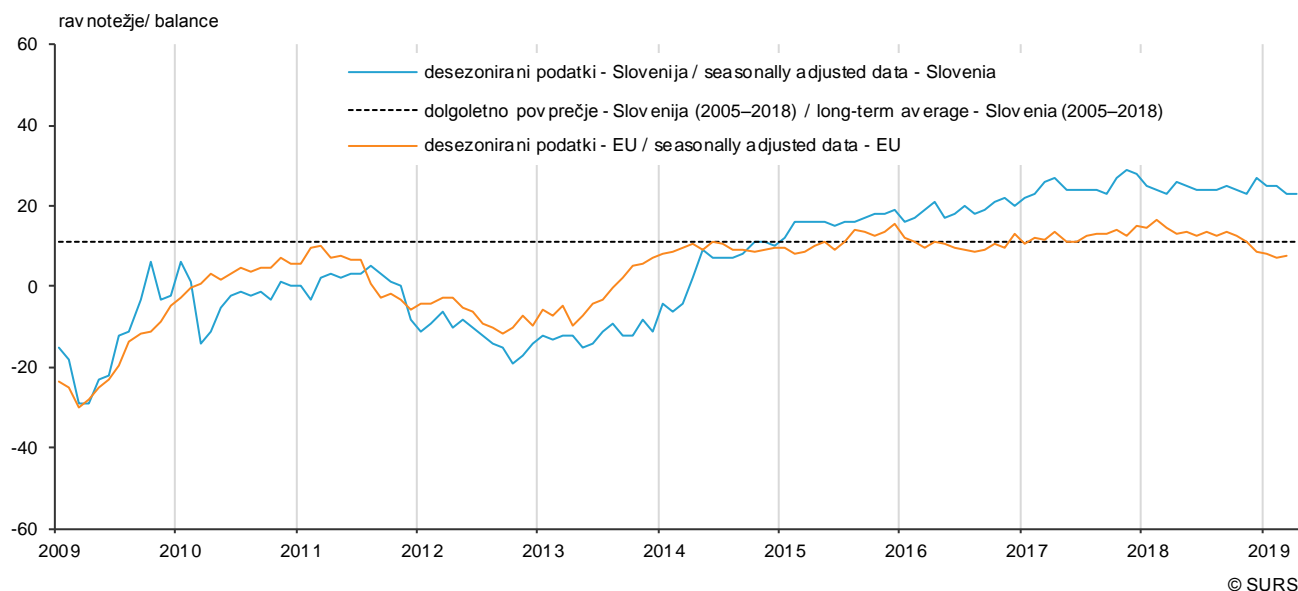
The chart on factors limiting construction shows the share of enterprises faced with the following groups of limitations:

- Group "**severe limitations**" includes enterprises faced with both demand and supply difficulties.
- Group "**demand difficulties**" includes enterprises faced with at least one of the limiting factors: insufficient demand or competition in own sector.
- Group "**supply difficulties**" includes enterprises faced with at least one of the limiting factors: bad weather conditions, high cost of material, labour or capital, access to bank credits, shortage of skilled labour, of equipment or of material.
- Group "**no limits**" includes enterprises with no limits in building activity.

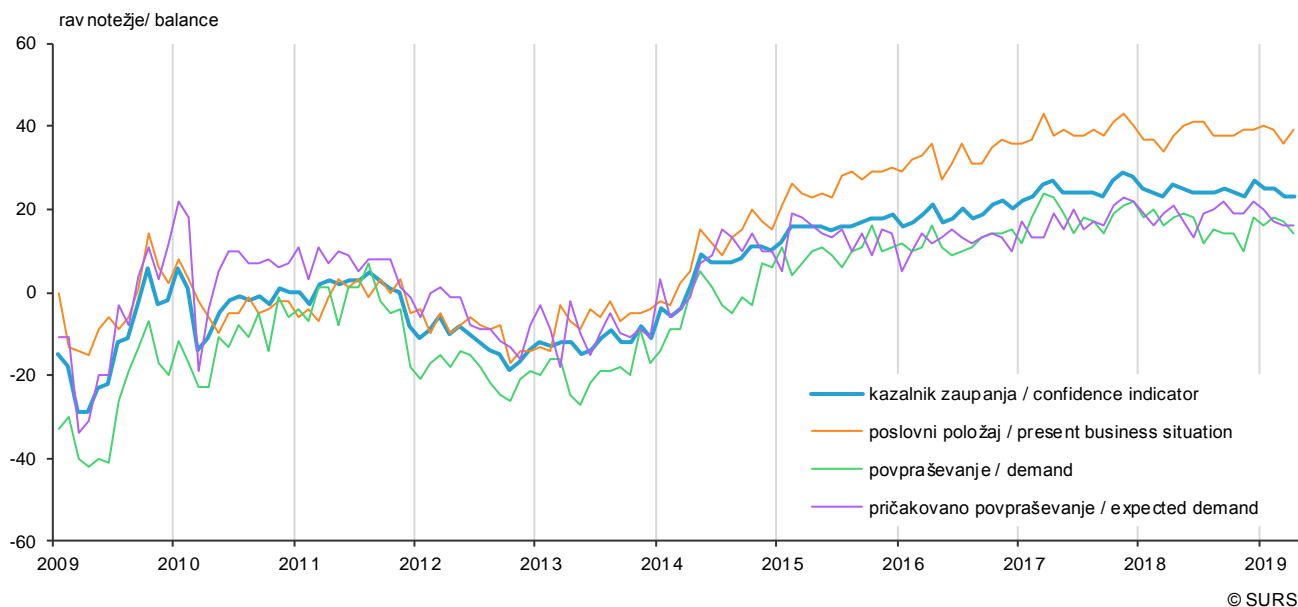
## POSLOVNE TENDENCE V STORITVENIH DEJAVNOSTIH BUSINESS TENDENCY SURVEY IN SERVICES

### 10 KAZALNIK ZAUPANJA V STORITVENIH DEJAVNOSTIH CONFIDENCE INDICATOR IN SERVICES

#### 10.1 KAZALNIK ZAUPANJA V STORITVENIH DEJAVNOSTIH V SLOVENIJI IN EU<sup>1)</sup> CONFIDENCE INDICATOR IN SERVICES IN SLOVENIA AND EU<sup>1)</sup>



#### 10.2 KOMPONENTE KAZALNIKA ZAUPANJA V STORITVENIH DEJAVNOSTIH, SLOVENIJA COMPONENTS OF CONFIDENCE INDICATOR IN SERVICES, SLOVENIA



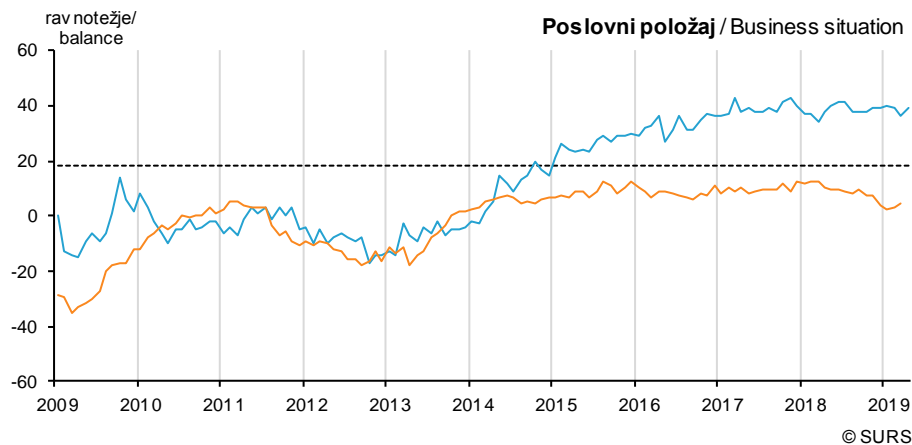
1) Vir: [http://ec.europa.eu/economy\\_finance/db\\_indicators/surveys/time\\_series/index\\_en.htm](http://ec.europa.eu/economy_finance/db_indicators/surveys/time_series/index_en.htm), okrog 5. v mesecu. Podatki za EU za zadnji mesec niso na voljo.

Source: [http://ec.europa.eu/economy\\_finance/db\\_indicators/surveys/time\\_series/index\\_en.htm](http://ec.europa.eu/economy_finance/db_indicators/surveys/time_series/index_en.htm), around 5th of the month. Data for EU for the last month are not available.

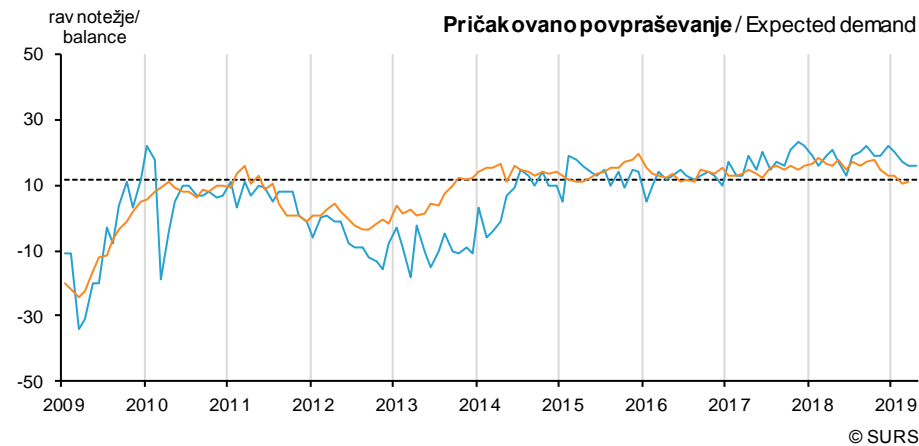
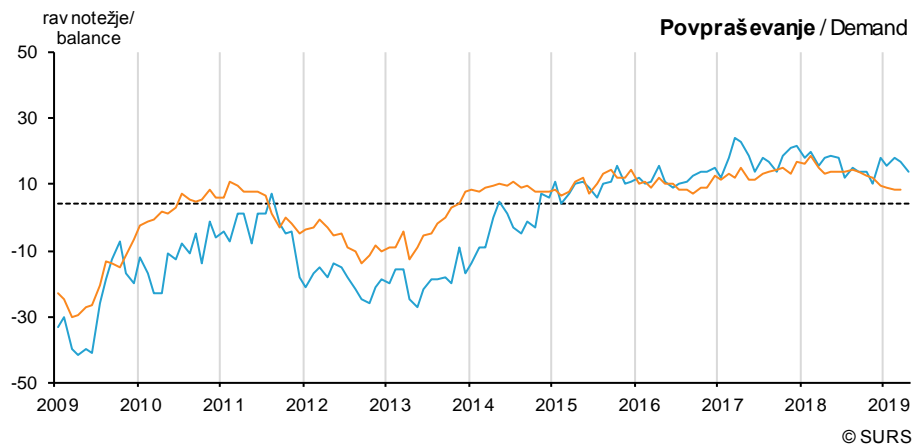
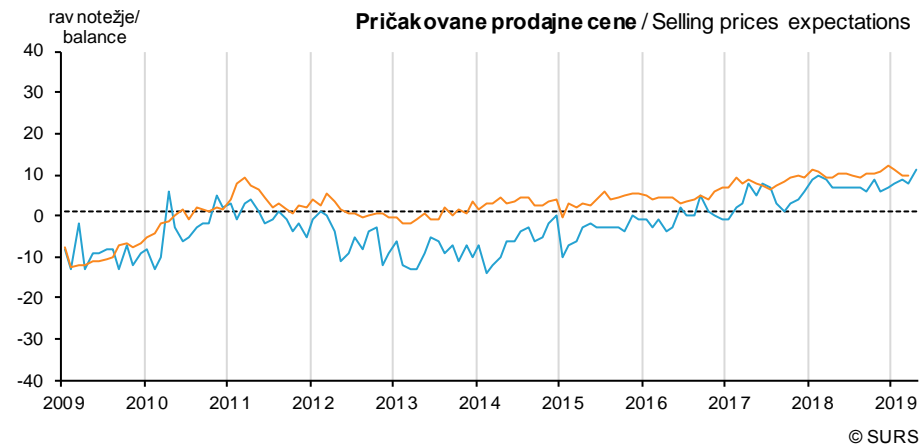
# 11 GIBANJE EKONOMSKIH KAZALNIKOV V STORITVENIH DEJAVNOSTIH V SLOVENIJI IN EU<sup>1)</sup>

## EVOLUTION OF ECONOMIC INDICATORS IN SERVICES IN SLOVENIA AND EU<sup>1)</sup>

**Ocena stanja**  
Appreciation of situation



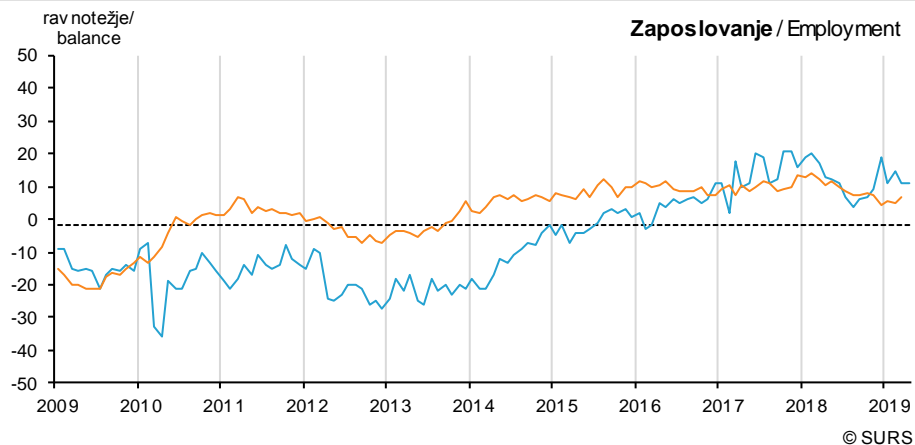
**Pričakovanja v naslednjih 3 mesecih**  
Expectations in the next 3 months



— desezonirani podatki Slovenija / seasonally adjusted data Slovenia  
— desezonirani podatki EU / seasonally adjusted data EU

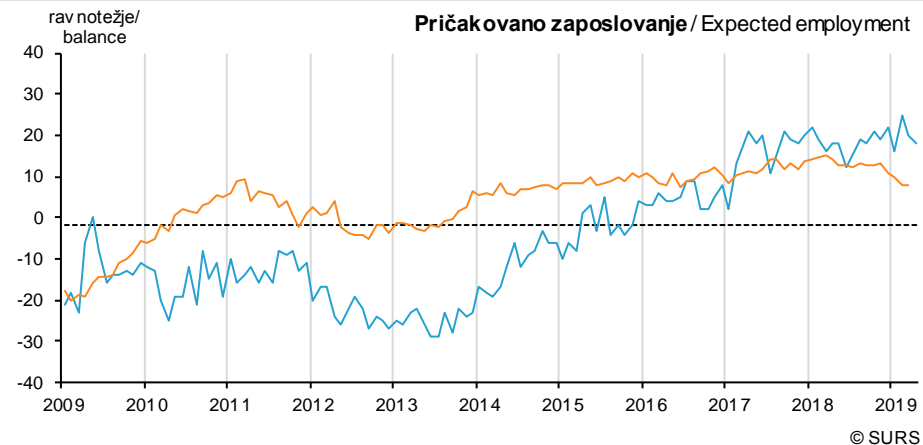
- - - dolgoletno povprečje Slovenija (2005–2018) / long-term average Slovenia (2005–2018)

**Ocena stanja**  
Appreciation of situation



— desezonirani podatki Slovenija / seasonally adjusted data Slovenia  
— desezonirani podatki EU / seasonally adjusted data EU

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



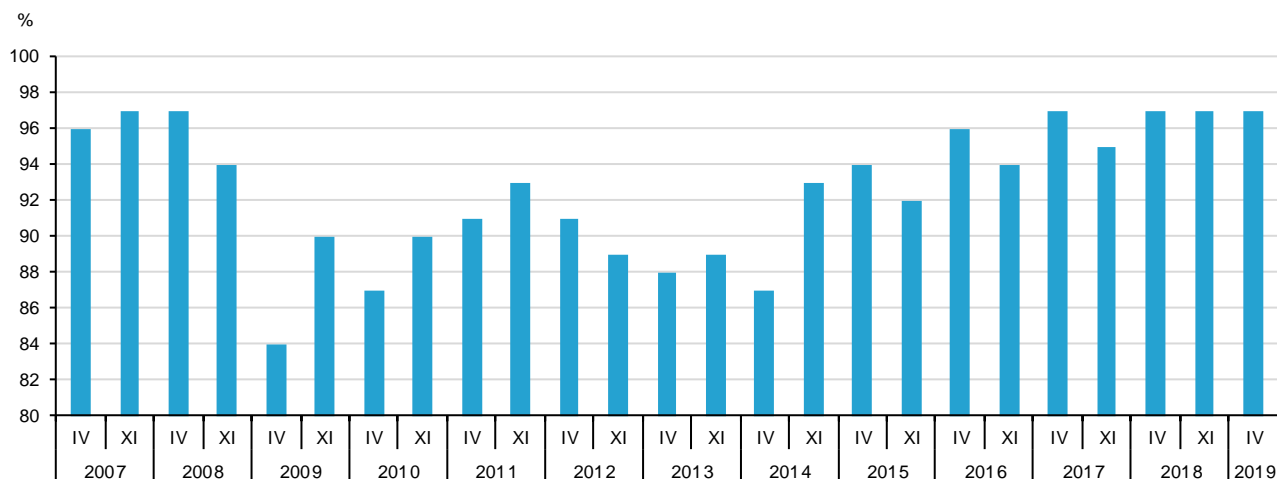
· - - - dolgoletno povprečje Slovenija (2005–2018) / long-term average Slovenia (2005–2018)

- 1) Vir: [http://ec.europa.eu/economy\\_finance/db\\_indicators/surveys/time\\_series/index\\_en.htm](http://ec.europa.eu/economy_finance/db_indicators/surveys/time_series/index_en.htm), okrog 5. v mesecu. Podatki za EU za zadnji mesec niso na voljo.  
Source: [http://ec.europa.eu/economy\\_finance/db\\_indicators/surveys/time\\_series/index\\_en.htm](http://ec.europa.eu/economy_finance/db_indicators/surveys/time_series/index_en.htm), around 5th of the month. Data for EU for the last month are not available.

## POSLOVNE TENDENCE – INVESTICIJE V PREDELOVALNIH DEJAVNOSTIH BUSINESS TENDENCY – INVESTMENT IN MANUFACTURING

### 12 INVESTICIJE V PREDELOVALNIH DEJAVNOSTIH INVESTMENT IN MANUFACTURING

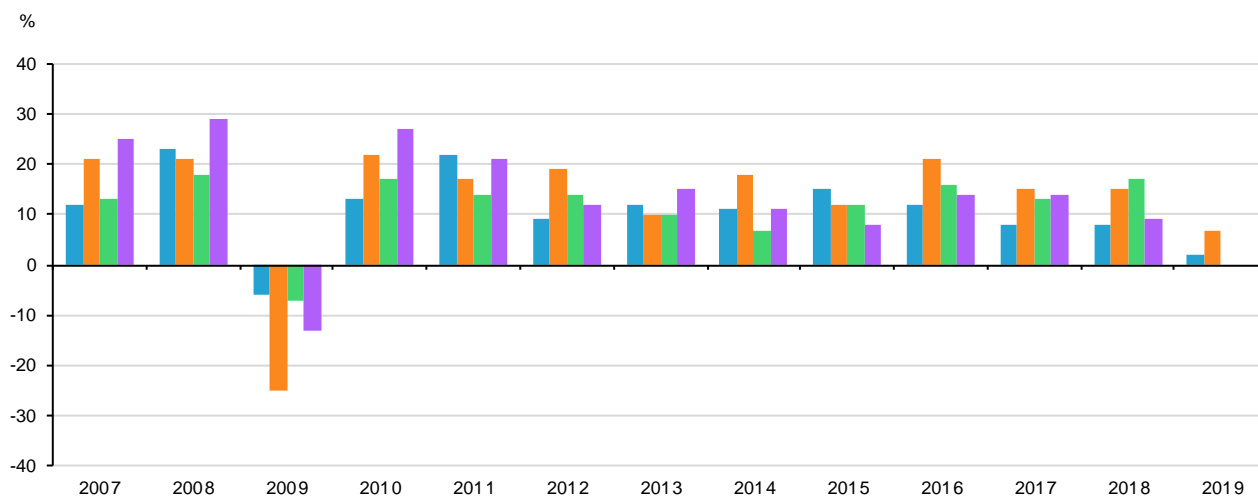
#### 12.1 DELEŽ PODJETIJ, KI INVESTIRAJO, SLOVENIJA SHARE OF INVESTMENT ENTERPRISES, SLOVENIA



IV - rezultati spomladanske ankete / spring survey results XI - rezultati jesenske ankete / autumn survey results

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#### 12.2 INVESTICIJE V OSNOVNA SREDSTVA - % SPREMEMBE GLEDE NA PREDHODNO LETO FIXED CAPITAL INVESTMENT - % CHANGE IN RELATION TO PRECEDING YEAR



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■ Napoved za opazovano leto, izražena v predhodnem letu. / Assessment for the observed year made in the preceding year.

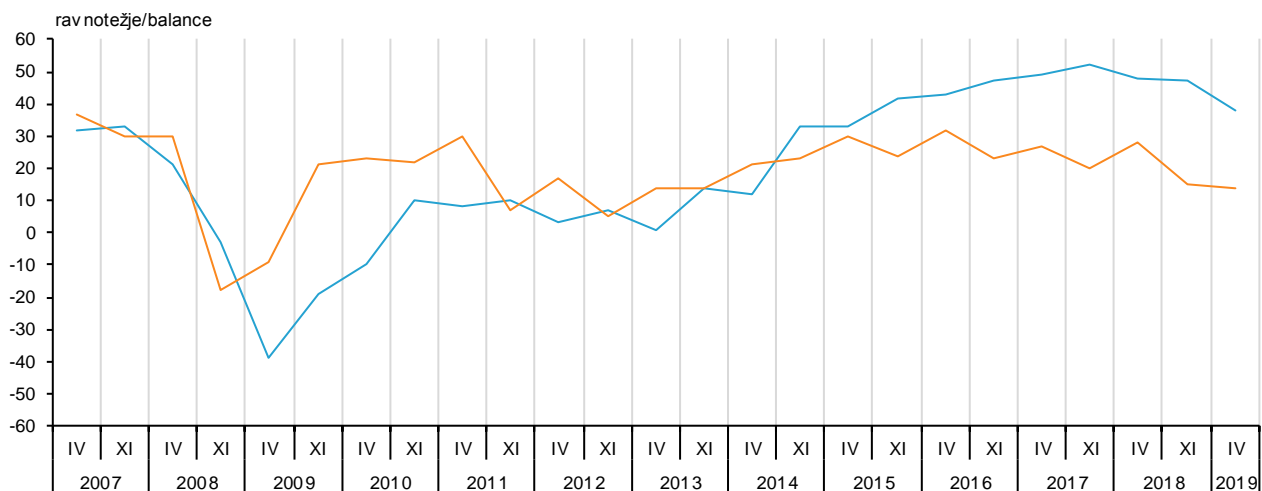
■ Spomladanska ocena za tekoče leto v primerjavi s predhodnim letom. / Spring assessment for the observed year made in comparison with the preceding year.

■ Jesenska ocena za tekoče leto v primerjavi s predhodnim letom. / Autumn assessment for the observed year made in comparison with the preceding year.

■ Ocena za opazovano leto, izražena v naslednjem letu. / Assessment for the observed year made next year.

### 13 POSLOVNO STANJE PREDELOVALNIH PODJETIJ, SLOVENIJA BUSINESS SITUATION OF MANUFACTURING ENTERPRISES, SLOVENIA

#### 13.1 SEDANJE IN PRIČAKOVANO POSLOVNO STANJE PRESENT AND EXPECTED BUSINESS SITUATION



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— sedanje poslovno stanje / present business situation

— pričakovano poslovno stanje / expected business situation

IV – rezultati spomladanske ankete / spring survey results

XI – rezultati jesenske ankete / autumn survey results