STATISTIČNI URAD REPUBLIKE SLOVENIJE
STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA

STATISTIČNE INFORMACIJE
RAPID REPORTS

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20 TRGOVINA IN DRUGE STORITVENE DEJAVNOSTI
DISTRIBUTIVE TRADE AND OTHER SERVICE ACTIVITIES

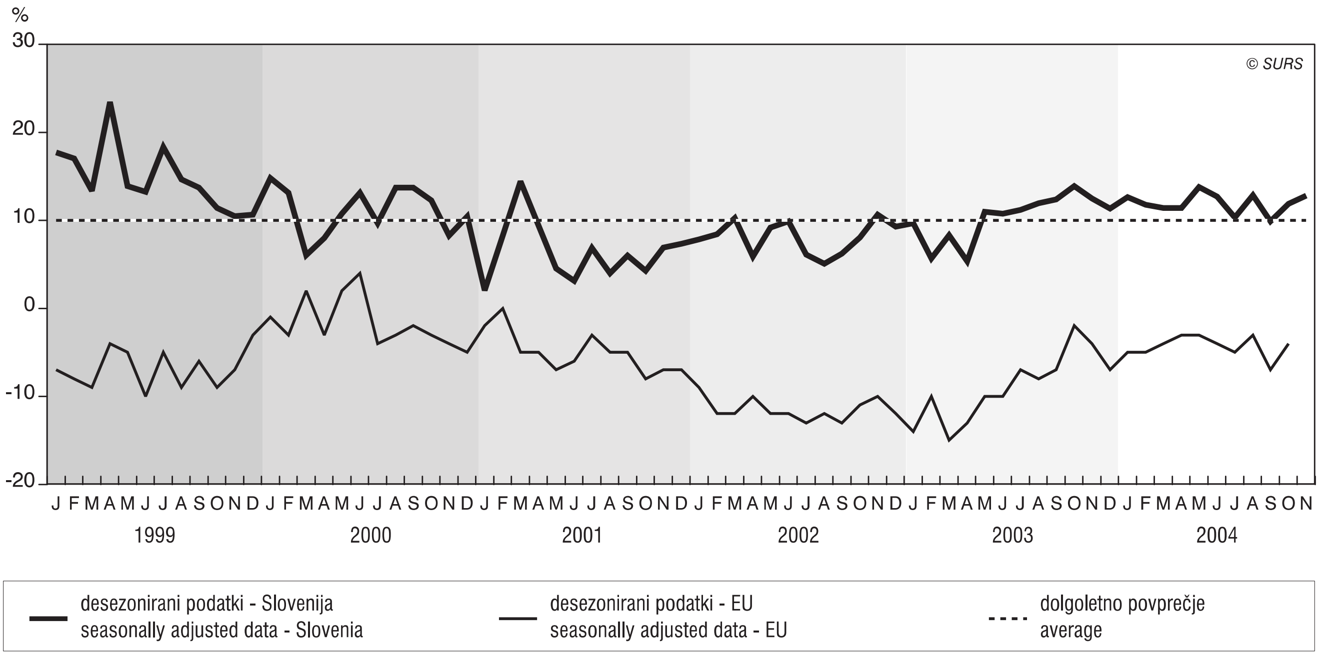
št./No 45

POSLOVNE TENDENCE V TRGOVINI NA DROBNO, SLOVENIJA, NOVEMBER 2004
BUSINESS TENDENCY IN RETAIL TRADE, SLOVENIA, NOVEMBER 2004

- V novembru 2004 je bila desezonirana vrednost kazalca zaupanja v trgovini na drobno višja v vseh treh primerjavah: glede na pretekli mesec za 1 odstotno točko, glede na lanski november prav tako za 1 odstotno točko, glede na lansko povprečje pa za 3 odstotne točke.
- Na dvig vrednosti kazalca zaupanja je vplivalo izboljšanje kazalca pričakovanega poslovnega položaja; kazalca sedanji poslovni položaj in obseg zalog sta se namreč poslabšala.
- Kazalci stanj so se večinoma poslabšali, izjema je bil le kazalec konkurenčnosti. Kazalci pričakovanj pa so se večinoma izboljšali; le za kazalca pričakovano zaposlovanje in pričakovane prodajne cene je bilo zabeleženo poslabšanje.

- In November 2004 the seasonally adjusted retail trade confidence indicator rose by 1 percentage point compared to October 2004. Compared to November 2003 it also rose by 1 percentage point while compared to last year's average its value climbed by 3 percentage points.
- This development of the confidence indicator was determined by the improvement of the expected business situation. On the other hand, the indicator of the present business situation and the indicator of the volume of stocks deteriorated.
- The indicators of the present business situation mostly worsened, except the competition indicator. Improvements were recorded for most indicators of the expected business situation, except for the indicators of expected employment and selling prices expectations, which showed a decline.

I. KAZALEC ZAUPANJA[1] V SLOVENIJI IN EU[2], JANUAR 1999 - NOVEMBER 2004
I. CONFIDENCE INDICATOR[1] IN SLOVENIA AND EU[2], JANUARY 1999 - NOVEMBER 2004



[1] Kazalec zaupanja je povprečje ravnotežij na vprašanja o sedanjem in pričakovanem poslovnem položaju ter sedanjem obsegu zalog (obrnjen predznak).
The confidence indicator is an average of responses (balances) to questions on present and expected business situation and present stock (the latter with inverted sign).

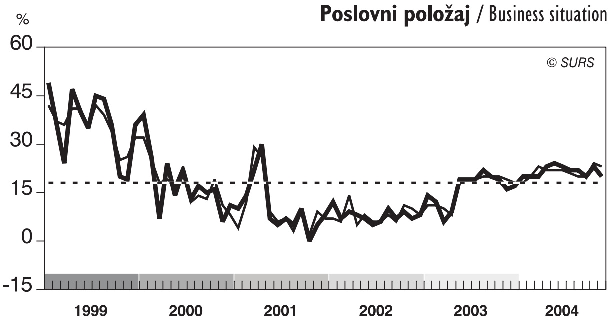
[2] Vir podatkov je Evropska komisija. Podatki o EU za zadnji mesec nam niso na voljo.
Source for EU data is European Commission. Data for EU for the last month are not available.

2. GIBANJE EKONOMSKIH KAZALCEV V TRGOVINI NA DROBNO V SLOVENIJI, JANUAR 1999 - NOVEMBER 2004

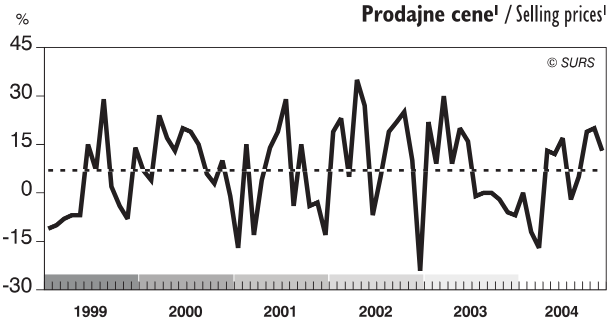
2. EVOLUTION OF ECONOMIC INDICATORS IN RETAIL TRADE IN SLOVENIA, JANUARY 1999 - NOVEMBER 2004

Ocena stanj / Appreciation of situation

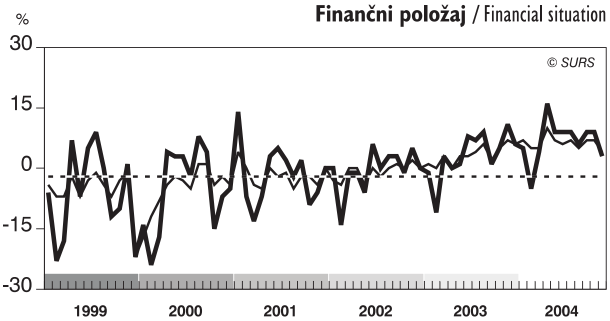
Poslovni položaj / Business situation



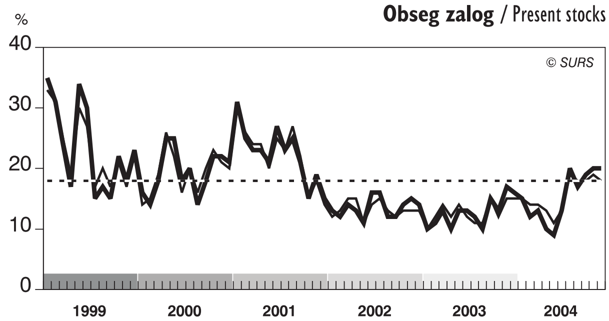
Prodajne cene[1] / Selling prices[1]



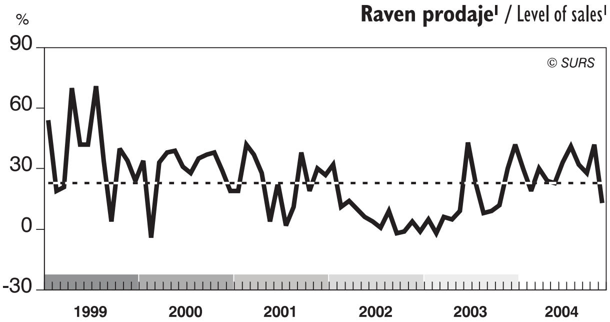
Finančni položaj / Financial situation



Obseg zalog / Present stocks

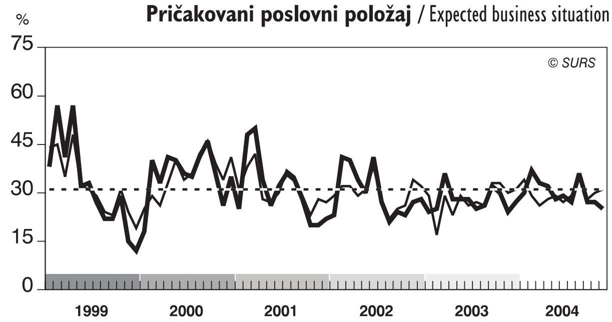


Raven prodaje[1] / Level of sales[1]

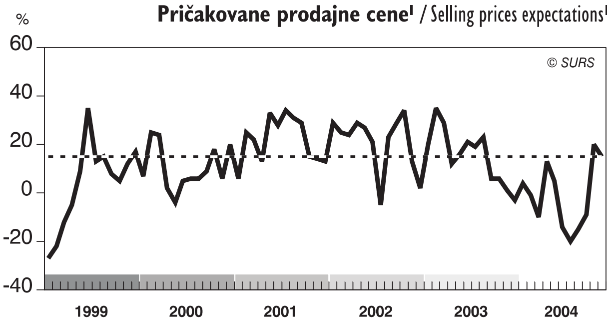


Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months

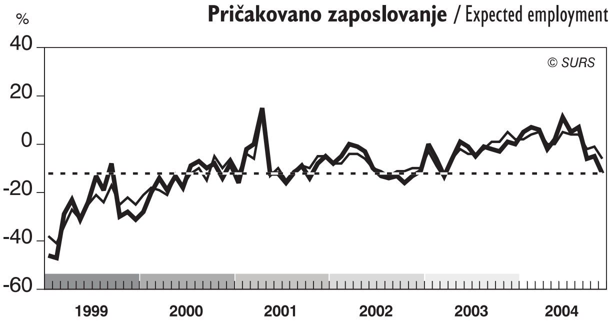
Pričakovani poslovni položaj / Expected business situation



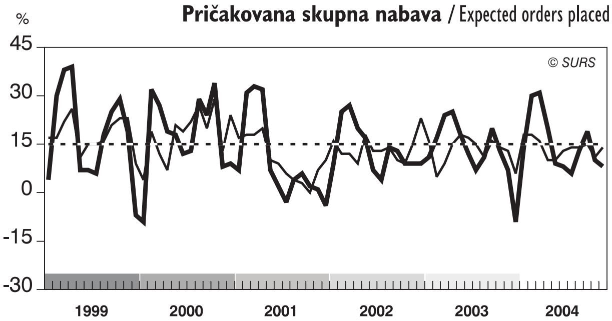
Pričakovane prodajne cene[1] / Selling prices expectations[1]



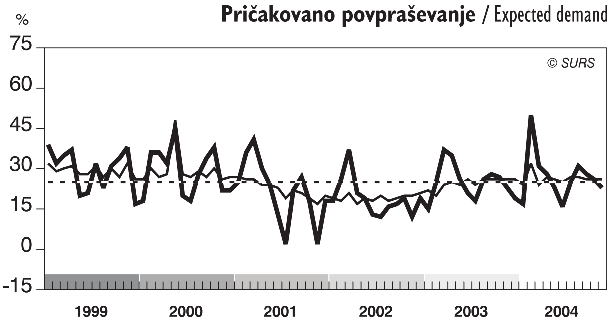
Pričakovano zaposlovanje / Expected employment



Pričakovana skupna nabava / Expected orders placed



Pričakovano povpraševanje / Expected demand



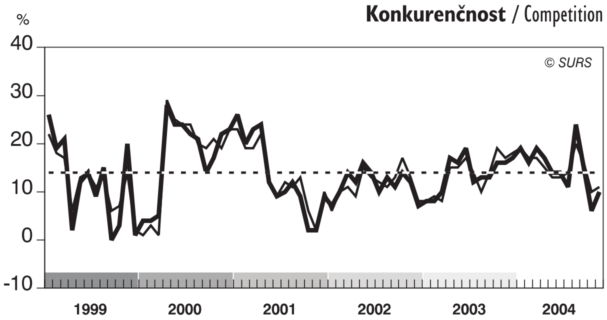
originalni podatki / raw data — desezonirani podatki / seasonally adjusted data - - - - dolgoletno povprečje / average

[1] Sezonska komponenta ni prisotna. / [1] No seasonal component.

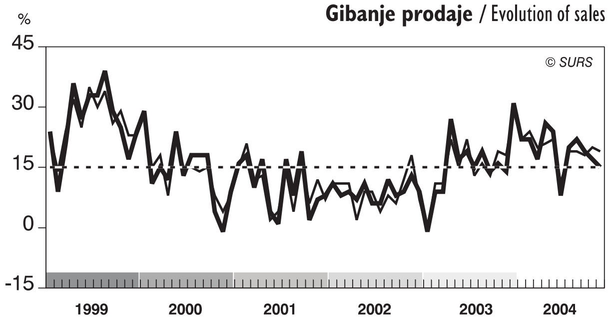
Ocena konkurenčnosti in gibanje prodaje

Appreciation of competition and evolution of sales

Konkurenčnost / Competition



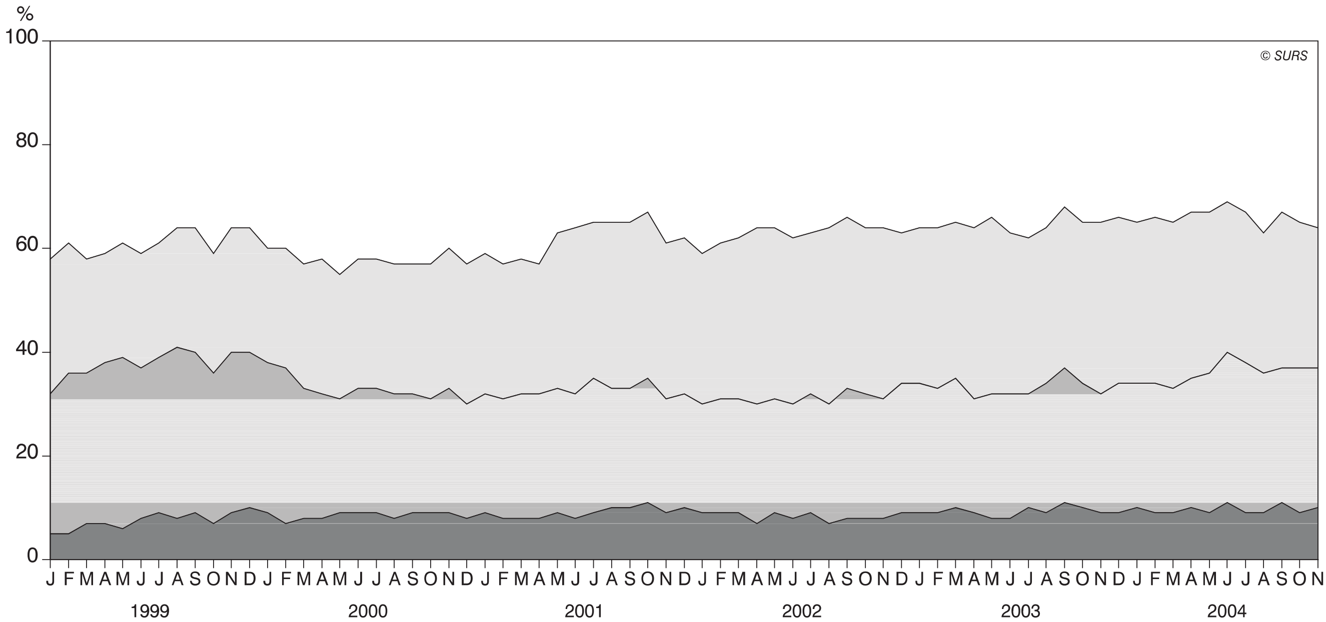
Gibanje prodaje / Evolution of sales



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

Omejitveni dejavniki v trgovini na drobno

Obstacles in retail trade



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

- Skupina **hude omejitve** zajema podjetja, ki imajo hkrati težave z dejavniki iz skupine "težave s povpraševanjem" kot tudi z dejavniki iz skupine "težave s ponudbo".
- Skupina **težave s ponudbo** zajema podjetja, ki imajo težave s slabo ponudbo, visokimi stroški dela, visoko ceno denarja, težavami z dostopnostjo do bančnih kreditov, premajhno prodajno površino in premajhnimi skladiščnimi prostori.
- Skupina **težave s povpraševanjem** zajema podjetja, ki imajo težave z nizkim povpraševanjem in konkurenco v sektorju.
- Skupina **ni omejitev** zajema podjetja, ki nimajo težav pri prodaji.

The chart on retail trade obstacles shows the share of enterprises faced with the following groups of problems:

- Group **severe obstacles** includes enterprises faced with problems from the group "demand difficulties" and those from the group "supply difficulties" at the same time.
- Group **supply difficulties** includes enterprises faced with bad supply, high cost of labour, high cost finance, problems with access to bank credits small sales surface and small storage capacity.
- Group **demand difficulties** includes enterprises faced with low demand and competition in own sector.
- Group **no limits** includes enterprises with no limits to retail.

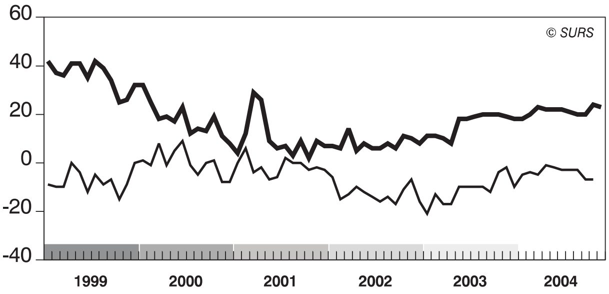
hude omejitve / severe obstacles — težave s ponudbo / supply difficulties — težave s povpraševanjem / demand difficulties — ni omejitev / no limits

3. GIBANJE EKONOMSKIH KAZALCEV V TRGOVINI NA DROBNO V SLOVENIJI IN EU[1], JANUAR 1999 - NOVEMBER 2004

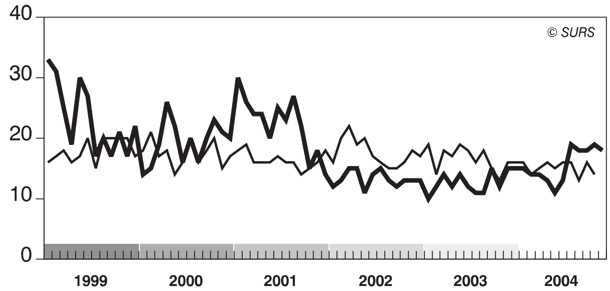
3. EVOLUTION OF ECONOMIC INDICATORS IN RETAIL TRADE IN SLOVENIA AND EU[1], JANUARY 1999 - NOVEMBER 2004

Ocena stanj / Appreciation of situation

Poslovni položaj / Business situation

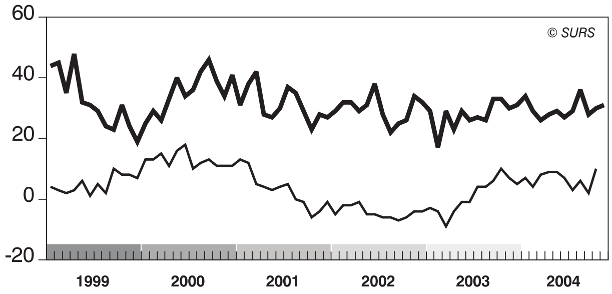


Obseg zalog / Present stocks

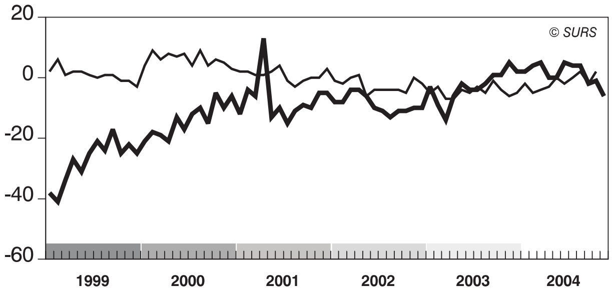


Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months

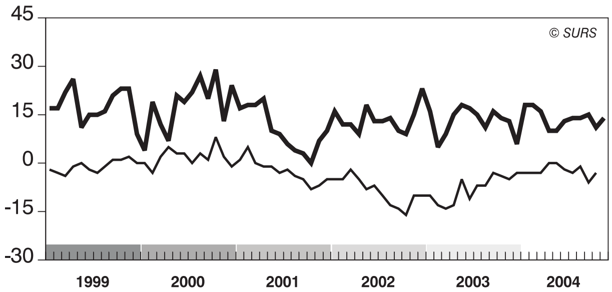
Pričakovani poslovni položaj / Expected business situation



Pričakovano zaposlovanje / Expected employement



Pričakovana skupna nabava / Expected orders placed



Slovenija / Slovenia — EU / EU

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

METODOLOŠKA POJASNILA

NAMEN STATISTIČNEGA RAZISKOVANJA

Namen kvalitativne Ankete o poslovnih tendencah v trgovini na drobno (vprašalnik PA-TRG) 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 trgovini na drobno in kazalca gospodarske klime, ki vključuje poleg kazalca zaupanja v trgovini na drobno tudi kazalec zaupanja pri potrošnikih in kazalec zaupanja v predelovalnih dejavnostih.

Panelno anketo o poslovnih tendencah v trgovini na drobno izvajamo v Sloveniji od januarja 1999 s poenotenim vprašalnikom, na podlagi poenotene metodologije in z enako periodiko, kakor jo izvajajo v državah članicah Evropske unije že več desetletij, kar omogoča neposredno primerljivost podatkov.

ENOTA OPAZOVANJA

Opazujemo podjetja, ki so po Standardni klasifikaciji dejavnosti razvrščena v trgovino na drobno, in sicer v naslednja oddelka:

- 50 - Prodaja, vzdrževanje in popravila motornih vozil; trgovina na drobno z motornimi gorivi,
- 52 - Trgovina na drobno, razen z motornimi vozili; popravila izdelkov široke porabe.

Vzorec podjetij je oblikovan na podlagi dveh meril:

- razvrstitve trgovskega podjetja po SKD in
- velikosti trgovskega podjetja (prihodek, skladno z zakonom o gospodarskih družbah).

VIRI

Na vprašalnik PA - TRG odgovarjajo direktorji podjetij ali drugi vodilni delavci med 1. in 10. v mesecu.

ZAJETJE

V panelni vzorec smo zajeli vsa velika in srednje velika podjetja ter 26 % malih podjetij (ali 37 % prihodka malih podjetij), ki so razvrščena v dejavnost trgovine na drobno ali trgovine z motornimi vozili. Opisani panelni vzorec pokriva 36 % podjetij vzorčnega okvira ali 93 % prihodka v trgovini na drobno in trgovine z motornimi vozili.

NAČIN ZBIRANJA PODATKOV

Anketo izvajamo mesečno po pošti.

UTEŽEVANJE ODGOVOROV

Odgovori so uteženi tako, da odražajo relativno pomembnost posameznega podjetja v vzorcu. Znotraj razredov SKD so odgovori uteženi s prihodkom.

NEODGOVORI

Neodgovore vsak mesec obdelamo skladno s poenoteno metodologijo.

DEFINICIJE IN POJASNILA

Ravnotežje je razlika med pozitivnimi in negativnimi odgovori, izraženimi v odstotkih. Ravnotežja prikazujejo gibanje opazovanih ekonomskih kazalcev (stanj in pričakovanj), ne pa dejanskih velikosti ekonomskih kazalcev. Grafikoni prikazujejo ravnotežja po posameznih vprašanjih.

METHODOLOGICAL EXPLANATIONS

PURPOSE OF THE STATISTICAL SURVEY

The purpose of the qualitative Survey on Business Tendency (questionnaire PA-TRG) 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 retail trade and latter on also for the sentiment indicator, which also includes the consumer confidence indicator and the confidence indicator in manufacturing.

We have been carrying out the Panel Survey on Business Tendency in Retail Trade in Slovenia since January 1999 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 retail trade or sale of motor vehicles in the following divisions:

- 50 - Sale, maintenance and repair of motor vehicles, retail sale of fuels
- 52 - Retail trade, except of motor vehicles, repair of personal and household goods

They were selected into the panel by two criteria:

- the classification of the enterprise according to the Standard Classification of Activities (SCA) and
- the size of the enterprises (turnover in accordance with the Law on Business Companies).

SOURCES

Persons responding to the monthly PA-TRG questionnaire are managers of enterprises or other executives. They respond between the 1st and the 10th of the month.

COVERAGE

The panel includes all large and medium-sized enterprises and 26% of small enterprises (or 37% of their turnover), the principal activity of which is classified into retail trade and sale of motor vehicles. The panel covers 36% of enterprises of the studied population or 93% of turnover in retail trade and sale of motor vehicles.

METHOD OF DATA COLLECTION

The survey is carried out monthly by mail.

WEIGHTS FOR RESPONSES

Responses to individual questions are weighted so that they reflect relative importance of an individual enterprise in the panel. Inside the SKD classes responses are weighted with the turnover.

NON-RESPONSES

Non-responses are processed every month in accordance with the harmonized methodology.

DEFINITIONS AND EXPLANATIONS

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

Na grafih so prikazane desezonirane vrednosti. To so vrednosti, pri katerih je izključen vpliv sezone, vsebujejo pa trend-cikel in naključno komponento. Podatki za EU so desezonirani z metodo DAINTIES, za Slovenijo pa z metodo TRAMO/SEATS, ki temelji na ARIMA modelih. Pri oblikovanju modelov smo upoštevali obdobje od januarja 1999 do januarja 2004. Pri prodajnih cenah, pričakovanih prodajnih cenah in ravni prodaje sezonska komponenta ni prisotna.

Kazalec zaupanja je povprečje odgovorov (ravnotežij) na vprašanja o sedanjem in pričakovanem poslovnem položaju in sedanjem obsegu zalog (obrnjen predznak).

OBJAVLJANJE REZULTATOV

Sodelujoči v anketi prejmejo informacijo o dejavnosti, v katero so uvrščeni.

Drugim uporabnikom so ti podatki dostopni na ravni trgovine na drobno in po velikostnih razredih podjetij. Objavljamo jih mesečno v Statističnih informacijah in podatkovni bazi SI-STAT (http://www.stat.si).

VPRAŠANJA:

- Ocene stanj:
  - Ocena poslovnega položaja v zadnjih 3 mesecih: dober, zadovoljiv - normalen glede na sezono, slab?
  - Prodajne cene so v primerjavi s preteklim mesecem: višje, enake, nižje?
  - Ocena finančnega položaja v primerjavi s preteklim mesecem: boljši, enak, slabši?
  - Ocena obsega zalog: premajhne, ustrezne - normalne glede na sezono, prevelike?
  - Ocena prodaje glede na isti mesec lanskega leta: na višji ravni, na isti ravni, na nižji ravni?

- Pričakovanja v naslednjih mesecih:
  - Pričakovani poslovni položaj čez 6 mesecev: boljši, enak, slabši?
  - Pričakovane prodajne cene v naslednjih mesecih: višje, enake, nižje?
  - Pričakovano zaposlovanje v naslednjih 3 mesecih: povečalo, ostalo enako, zmanjšalo?
  - Pričakovani obseg skupne nabave (tuji in domači dobavitelji) v naslednjih 3 meseci: večji, enak, manjši?
  - Pričakovano povpraševanje v naslednjih 3 mesecih: povečalo, ostalo enako, zmanjšalo?

  - Ocena konkurence na vašem področju glede na pretekli mesec: večja, enaka, manjša?
  - Ocena gibanja prodaje za to obdobje leta: dobro, zadovoljivo, slabo?
  - Dejavniki, ki ovirajo izboljšanje sedanjega položaja: ni omejitev, nizko povpraševanje, slaba ponudba, visoki stroški dela, visoka cena denarja, težka dostopnost do bančnih kreditov, premajhna prodajna površina, premajhni skladiščni prostori, konkurenca v sektorju, ostalo?
  - Pričakovani obseg nabave pri domačih dobaviteljih v naslednjih 3 mesecih: večji, enak, manjši, nimamo domačih dobaviteljev?
  - Pričakovani obseg nabave pri tujih dobaviteljih v naslednjih 3 mesecih: večji, enak, manjši, nimamo tujih dobaviteljev?

Data in the charts are seasonally adjusted. Values are adjusted for the seasonal component and include the trend-cycle component and the irregular component. Data for the 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 January 1999 to January 2004. Selling prices, selling prices expectation and the level of sales have no seasonal component.

The **confidence indicator** shows an average of responses (balances) to questions on present and expected business trend and present stock (the latter with inverted sign).

PUBLISHING

Persons participating in the survey get the information on the activity of their enterprises.

Other users can get data for retail trade and data for large, medium-sized and small enterprises published monthly in Rapid Reports and in the SI-STAT database (http://www.stat.si/eng).

QUESTIONS:

- Appreciation of situation:
  - Assessment of the present business situation over the past 3 months: good, satisfactory (normal for the season), bad?
  - Selling prices compared to the last month: up, unchanged, down?
  - Assessment of financial situation compared to the last month: better, same, worse?
  - Assessment of stocks: too small, adequate (normal for the season), too large?
  - Assessment of sales compared to the same month of the previous year: at a higer level, unchanged, at a lower level?

- Expectation in the next months:
  - Expected business situation 6 months ahead: better, same, worse?
  - Selling price expectations for the next months: up, unchanged, down?
  - Employment expectations for the next 3 months: up, unchanged, down?
  - Expectations on orders to place with total suppliers (domestic and foreign) in the next 3 months: up, unchanged, down?
  - Expected demand for the next 3 months: up, unchanged, down?

  - Assessment of competition in own sector compared to the last month: up, unchanged, down?
  - Assessment of sales for this period of year: good, satisfactory, bad?
  - Factors limiting the improvement of the present business situation: none, low demand, bad supply, high labour costs , high costs of finance, problems with access to bank credits, small sales surface, small storage capacity, competition in own sector, other?
  - Expectations on orders to place with domestic suppliers in the next 3 months: up, unchanged, down, no domestic suppliers?
  - Expectations on orders to place with foreign suppliers in the next 3 months: up, unchanged, down, no foreign suppliers?

KOMENTAR

V novembru 2004 je bila desezonirana vrednost kazalca zaupanja v trgovini na drobno višja v vseh treh primerjavah: glede na pretekli mesec za 1 odstotno točko, glede na lanski november prav tako za 1 odstotno točko, glede na lansko povprečje pa za 3 odstotne točke.

Na dvig vrednosti kazalca zaupanja je vplivalo izboljšanje kazalca pričakovanega poslovnega položaja; kazalca sedanji poslovni položaj in obseg zalog sta se namreč poslabšala.

Kazalci stanj so se večinoma poslabšali, izjema je bil le kazalec konkurenčnosti. Kazalci pričakovanj pa so se večinoma izboljšali; le za kazalca pričakovano zaposlovanje in pričakovane prodajne cene je bilo zabeleženo poslabšanje.

COMMENT

In November 2004 the seasonally adjusted retail trade confidence indicator rose by 1 percentage point compared to October 2004. Compared to November 2003 it also rose by 1 percentage point while compared to last year's average its value climbed by 3 percentage points.

This development of the confidence indicator was determined by the improvement of the expected business situation. On the other hand, the indicator of the present business situation and the indicator of the volume of stocks deteriorated.

The indicators of the present business situation mostly worsened, except the competition indicator. Improvements were recorded for most indicators of the expected business situation, except for the indicators of expected employment and selling prices expectations, which showed a decline.

PRIČAKOVANJA

PRIČAKOVANI POSLOVNI POLOŽAJ

Desezonirana vrednost kazalca pričakovanega poslovnega položaja je v primerjavi s preteklim mesecem in v primerjavi z novembrom 2003 višja za 1 odstotno točko. V primerjavi z lanskim povprečjem pa se je zvišala za 3 odstotne točke.

PRIČAKOVANE PRODAJNE CENE

V primerjavi s preteklim mesecem je desezonirana vrednost kazalca pričakovanih prodajnih cen padla za 5 odstotnih točk, medtem ko je glede na isti mesec lanskega leta zrasla za 14 odstotnih točk. Glede na lansko povprečje pa je vrednost tega kazalca ostala nespremenjena.

PRIČAKOVANO ZAPOSLOVANJE

Desezonirana vrednost kazalca pričakovanega zaposlovanja se je znižala v vseh treh primerjavah. V primerjavi s preteklim mesecem je bil zabeležen padec za 5 odstotnih točk, glede na november 2003 za 13 odstotnih točk in glede na lansko povprečje za 3 odstotne točke.

PRIČAKOVANA SKUPNA NABAVA

Desezonirana vrednost kazalca pričakovane skupne nabave se je v primerjavi z oktobrom 2004 izboljšala za 3 odstotne točke. Glede na november 2003 in glede na lansko povprečje pa se je vrednost povišala za 1 odstotno točko.

PRIČAKOVANO POVPRAŠEVANJE

Desezonirana vrednost kazalca pričakovanega povpraševanja je ostala nespremenjena tako v primerjavi s preteklim mesecem kot tudi v primerjavi z novembrom 2003. Vendar pa je bila glede na lansko povprečje višja za 2 odstotni točki.

EXPECTATIONS

EXPECTED BUSINESS SITUATION

The seasonally adjusted value of the expected business situation indicator rose by 1 percentage point compared to the previous month as well as compared to November 2003. In comparison with last year’s average it increased by 3 percentage points.

SELLING PRICES EXPECTATIONS

The seasonally adjusted value of the selling prices expectations indicator showed a decline by 5 percentage points compared to the previous month while compared to November 2003 the value rose by 14 percentage points. According to last year’s average it remained unchanged.

EXPECTED EMPLOYMENT

The seasonally adjusted value of the expected employment indicator showed an overall decline. In comparison with the previous month a decline by 5 percentage points was recorded, compared to November 2003 by 13 percentage points and compared to last year’s average by 3 percentage points.

EXPECTED ORDERS

The seasonally adjusted value of the expected orders indicator improved by 3 percentage points between October and November 2004. Compared to November 2003 and to last year’s average the value rose by 1 percentage point.

EXPECTED DEMAND

The seasonally adjusted value of the expected demand indicator remained unchanged in comparison with the previous month as well as in comparison with November 2003. But it was 2 percentage points higher than last year’s average.

STANJA

POSLOVNI POLOŽAJ

V novembru 2004 je desezonirana vrednost kazalca poslovnega položaja malo padla glede na pretekli mesec, in sicer za 1 odstotno točko. V primerjavi z istim mesecem lanskega leta in glede na lansko povprečje je

SITUATION

BUSINESS SITUATION

In November 2004 the seasonally adjusted value of the business situation indicator slightly fell compared to the previous month, i.e. by 1 percentage point. Compared to November 2003 and to last year’s average it showed vrednost kazalca pokazala pozitiven razvoj, in sicer za 4 odstotne točke oziroma 7 odstotnih točk.

a positive development, i.e. by 4 and 7 percentage points, respectively.

PRODAJNE CENE

Desezonirana vrednost kazalca prodajnih cen je pokazala mesečni padec za 7 odstotnih točk. Primerjava z novembrom 2003 in z lanskim povprečjem pa je pokazala izboljšanje vrednosti za 19 oziroma 5 odstotnih točk.

SELLING PRICES

A month-to-month seasonally adjusted value of the selling prices indicator turned down by 7 percentage points. On the positive side, comparison with November 2003 and with last year's average showed an improvement i.e. by 19 and 5 percentage points, respectively.

FINANČNI POLOŽAJ

Padec desezonirane vrednosti kazalca finančnega položaja je bil zabeležen tako v primerjavi s preteklim mesecem (za 3 odstotne točke) kot tudi z novembrom 2003 (za 8 odstotnih točk). Vrednost kazalca je bila za 1 odstotno točko nad lanskim povprečjem.

FINANCIAL SITUATION

A bad performance of the seasonally adjusted value of the financial situation indicator was recorded compared to the previous month (fall by 3 percentage points) as well as compared to November 2003 (fall by 8 percentage points). The value was above last year's average by 1 percentage point.

OBSEG ZALOG

Desezonirana vrednost kazalca obsega zalog je ostala skoraj nespremenjena glede na pretekli mesec (padec za 1 odstotno točko). V primerjavi z novembrom 2003 je bilo zabeleženo zvišanje za 3 odstotne točke kakor tudi v primerjavi z lanskim povprečjem (za 5 odstotnih točk).

PRESENT STOCKS

The seasonally adjusted value of the present stocks indicator remained almost stable (a fall by 1 percentage point) between October and November 2004. Compared to November 2003 a rise by 3 percentage points was recorded as well as compared to last year's average (by 5 percentage points).

RAVEN PRODAJE

Desezonirana vrednost kazalca ravni prodaje se je v vseh treh primerjavah močno poslabšala: glede na pretekli mesec za 29 odstotnih točk, glede na november 2003 za 17 odstotnih točk in glede na lanskoletno povprečje za 3 odstotne točke.

LEVEL OF SALES

The seasonally adjusted value of the level of sales indicator showed a significant worsening in all three comparisons: compared to the previous month by 29 percentage points, to November 2003 by 17 percentage points and to last year's average by 3 percentage points.

KONKURENČNOST

Rahlo povišanje desezonirane vrednosti kazalca konkurenčnosti je bilo zabeleženo v primerjavi z oktobrom 2004, in sicer za 1 odstotno točko. Po drugi strani, pa je vrednost padla za 6 odstotnih točk v primerjavi z novembrom 2003 in je bila 3 odstotne točke pod lanskoletnim povprečjem.

COMPETITION

A slight rise of seasonally adjusted value of the competition indicator was noted compared to October 2004, i.e. by 1 percentage point. By contrast, in comparison with November 2003 the value fell by 6 percentage points and it was 3 percentage points below last year's average.

GIBANJE PRODAJE ZA TO OBDOBJE LETA

V novembru 2004 je bil zabeležen rahel padec (za 1 odstotno točko) desezonirane vrednosti kazalca gibanja prodaje v primerjavi s preteklim mesecem. Vendar pa se je vrednost izboljšala v primerjavi z novembrom 2003 in z lanskoletnim povprečjem, in sicer za 1 odstotno točko oziroma 3 odstotne točke.

EVOLUTION OF SALES FOR THIS PERIOD OF YEAR

In November 2004 a small deterioration (by 1 percentage point) of seasonally adjusted value of the evolution of sales indicator was recorded compared to previous month. But the value improved in comparison with November 2003 and with last year's average, i.e. by 1 and 3 percentage points, respectively.

OMEJITVENI DEJAVNIKI V TRGOVINI NA DROBNO

V trgovini na drobno se je 36 % podjetij (oz. 26 % prihodka) srečevalo z dejavniki iz skupine *"hude omejitve"*. V primerjavi s preteklim mesecem kot tudi z istim mesecem lanskega leta je bil delež teh podjetij višji za 1 odstotno točko.

Podjetij, ki so se srečevala s skupino dejavnikov *"težave s ponudbo"*, je bilo 27 % (oz. 26 % prihodka). Ta delež podjetij je bil glede na pretekli mesec nižji za 1 odstotno točko, glede na isti mesec lanskega leta pa je bil nižji za 6 odstotnih točk.

Podjetij, ki so se srečevala s skupino dejavnikov *"težave s povpraševanjem"*, je bilo 27 % (oz. 31 % prihodka). V primerjavi s preteklim mesecem je delež teh podjetij padel za 1 odstotno točko, medtem ko se je v primerjavi z novembrom 2003 povečal za 4 odstotne točke.

Podjetij, ki *niso imela omejitev* v poslovanju, je bilo 10 % (oz. 17 % prihodka). Delež teh podjetij je bil višji za 1 odstotno točko tako glede na

OBSTACLES IN RETAIL TRADE

In retail trade 36 % of enterprises (26 % of turnover) were faced with *"severe obstacles"* in trading. Compared to the previous month as well as to November 2003 the share of these enterprises was higher by 1 percentage point.

The share of enterprises faced with *"supply difficulties"* was 27 % (26 % of turnover), which was 1 percentage point less than in the previous month and 6 percentage points less than in November 2003.

The share of enterprises faced with *"demand difficulties"* was 27 % (31 % of turnover). Compared to the previous month this share fell by 1 percentage point while compared to November 2003 it rose by 4 percentage points.

Only 10 % of enterprises (17 % of turnover) experienced *no obstacles*. The share of these enterprises was higher by 1 percentage point pretekli mesec kot tudi glede na lanski november.

Podrobnejši pregled omejitvenih dejavnikov v trgovini na drobno[1):

- 48 % podjetij (ali 47 % prihodka) je omejevala konkurenca v sektorju,
- 36 % podjetij (ali 34 % prihodka) so omejevali visoki stroški dela,
- 32 % podjetij (ali 25 % prihodka) je omejevalo nezadostno povpraševanje,
- 25 % podjetij (ali 27 % prihodka) je omejevala visoka cena denarja,
- 14 % podjetij (ali 9 % prihodka) je omejevala premajhna prodajna površina,
- 11 % podjetij (ali 17 % prihodka) ni imelo omejitev v poslovanju,
- 11 % podjetij (ali 8 % prihodka) so omejevali drugi dejavniki, kot so finančna nedisciplina, visoke najemnine, slaba lokacija itd.,
- 11 % podjetij (ali 7 % prihodka) je omejevala dostopnost do bančnih kreditov,
- 8 % podjetij (ali 4 % prihodka) so omejevali premajhni skladiščni prostori,
- 3 % podjetij (ali 1 % prihodka) je omejevala slaba ponudba.

compared to the previous month as well as compared to November 2003.

A more detailed overview of obstacles in retail trade[1) shows that:

- 48 % of enterprises (or 47 % of turnover) were limited by competition in own sector,
- 36 % of enterprises (or 34 % of turnover) were limited by high cost of labour,
- 32 % of enterprises (or 25 % of turnover) were limited by insufficient demand,
- 25 % of enterprises (or 27 % of turnover) were limited by high cost of money,
- 14 % of enterprises (or 9 % of turnover) were limited by shortage of sales surface,
- 11 % of enterprises (or 17 % of turnover) experienced no obstacles,
- 11 % of enterprises (or 8 % of turnover) were limited by other factors such as lack of financial discipline, high rents, bad location, etc.,
- 11 % of enterprises (or 7 % of turnover) were limited by access to bank credits,
- 8 % of enterprises (or 4 % of turnover) were limited by small storage capacity,
- 3 % of enterprises (or 1 % of turnover) were limited by supply shortage.

1) Podjetja lahko označijo več dejavnikov, ki omejujejo njihovo poslovanje, zato vsota odstotkov ni 100.
Enterprises can select several obstacles to their business, so the total is not 100%.

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