STATISTIČNI URAD REPUBLIKE SLOVENIJE
STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA

STATISTIČNE INFORMACIJE
RAPID REPORTS

2. SEPTEMBER 2005
2 SEPTEMBER 2005

št./No 244

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

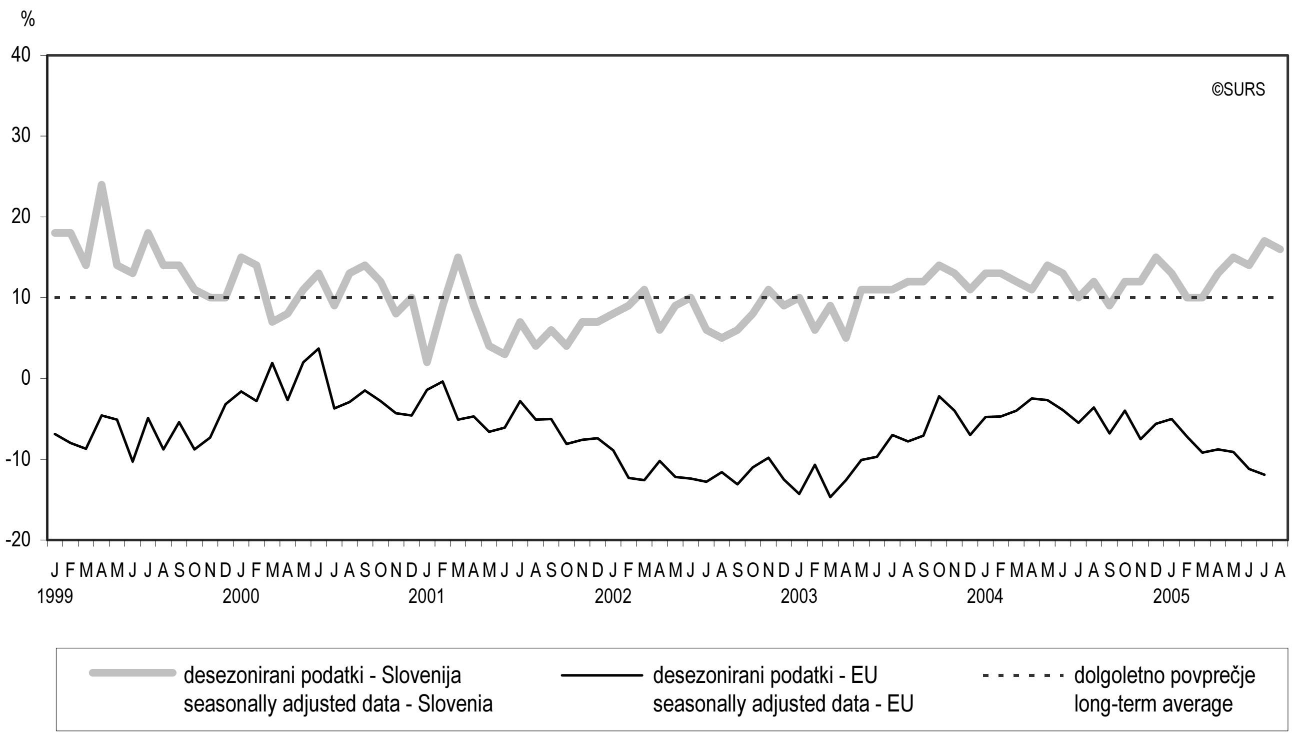
št./No 42

POSLOVNE TENDENCE V TRGOVINI NA DROBNO, SLOVENIJA, AVGUST 2005
BUSINESS TENDENCY IN RETAIL TRADE, SLOVENIA, AUGUST 2005

- V avgustu 2005 je bila desezonirana vrednost kazalca zaupanja v trgovini na drobno za 1 odstotno točko nižja kot prejšnji mesec, hkrati pa za 4 odstotne točke višja kot v lanskem avgustu in za prav toliko višja od lanskega povprečja.
- Na gibanje vrednosti kazalca zaupanja so vplivale slabša ocena *sedanjega poslovnega položaja*, boljša ocena *pričakovanega poslovnega položaja* in tudi ocena o večjem *obsegu zalog.*
- Večina kazalcev stanj se je zmanjšala, le kazalca obseg zalog in prodajne cene sta se povečala. Večina kazalcev pričakovanj pa se je izboljšala; poslabšala sta se kazalca pričakovana skupna nabava in pričakovano zaposlovanje.

- In August 2005 the seasonally adjusted retail trade confidence indicator slightly fell in comparison with the previous month, i.e. by 1 percentage point. Compared to August 2004 as well as compared to last year's average it rose by 4 percentage points.
- This development of the indicator was due to worsening in the assessment of *the present business situation,* improvement in the assessment of *the expected business situation* as well as the assessment of increased *volume of stocks.*
- Most situation indicators worsened, except the indicators of the volume of stocks and selling prices, which improved. On the other hand, the expectation indicators mostly improved. Exceptions were indicators of the expected orders and expected employment, which worsened.

1. KAZALEC ZAUPANJA[1)] V SLOVENIJI IN EU[2)] JANUAR 1999 - AVGUST 2005
CONFIDENCE INDICATOR[1)] IN SLOVENIA AND EU[2)] JANUARY 1999 - AUGUST 2005



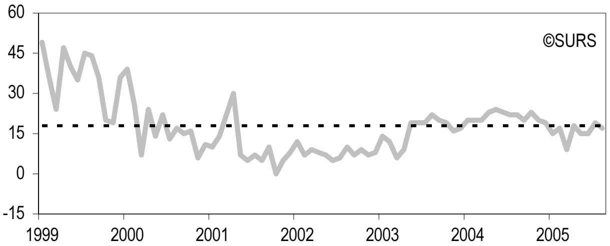
1) Kazalec zaupanja je povprečje odgovorov (ravnotežij) na vprašanja o sedanjem in pričakovanem poslovnem položaju ter sedanjem obsegu zalog (obrnjen predznak).
The confidence indicator is an average of responses (balances) to questions on present and expected business situation and present volume of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

2) Vir podatkov je Evropska komisija (http://europa.eu.int/comm/economy_finance/indicators/businessandconsumersurveys_en.htm). Podatki o EU za zadnji mesec niso na voljo.
Source for EU data is European Commission (http://europa.eu.int/comm/economy_finance/indicators/businessandconsumersurveys_en.htm). Data for EU for the last month are not available.

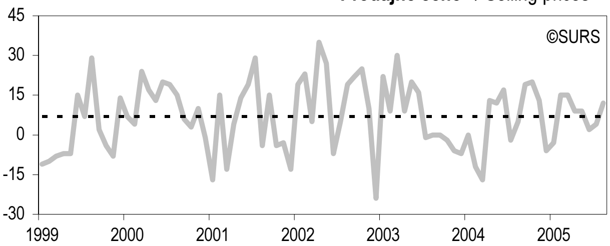
2. GIBANJE EKONOMSKIH KAZALCEV V TRGOVINI NA DROBNO V SLOVENIJI, JANUAR 1999 - AVGUST 2005
EVOLUTION OF ECONOMIC INDICATORS IN RETAIL TRADE IN SLOVENIA, JANUARY 1999 - AUGUST 2005

Ocena stanj
Appreciation of situation

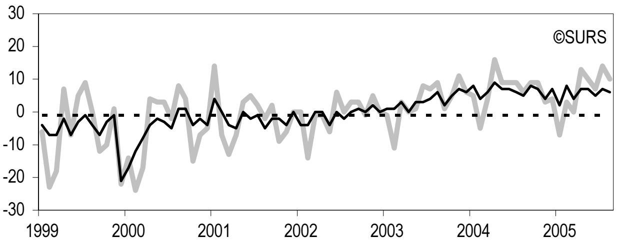
Poslovni položaj[1)] / Business situation[1)]



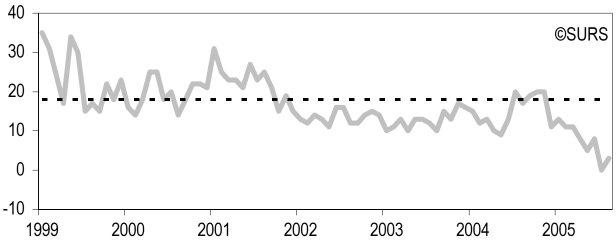
Prodajne cene[1)] / Selling prices[1)]



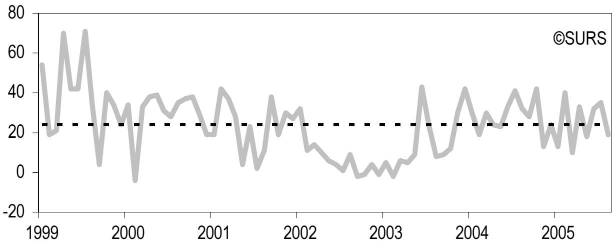
Finančni položaj / Financial situation



Obseg zalog[1)] / Volume of stocks[1)]

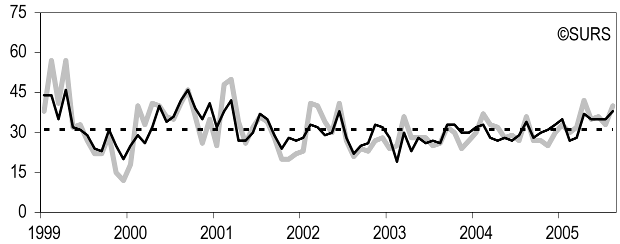


Raven prodaje[1)] / Level of sales[1)]

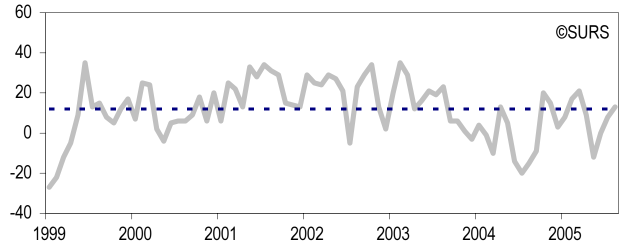


Pričakovanja v naslednjih 3 mesecih
Expectations in the next 3 months

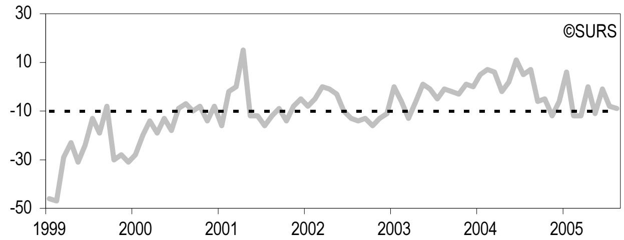
Pričakovani poslovni položaj / Expected business situation



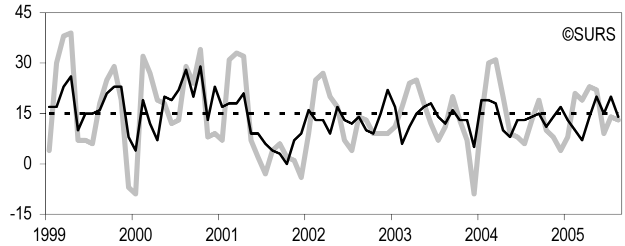
Pričakovane prodajne cene[1)] / Selling prices expectations[1)]



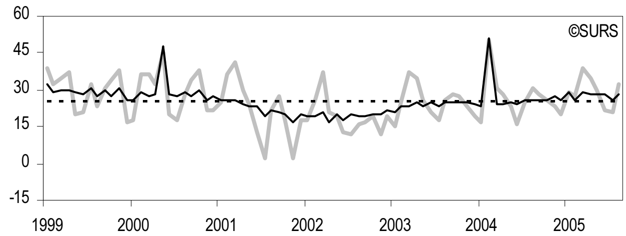
Pričakovano zaposlovanje[1)] / Expected employment[1)]



Pričakovana skupna nabava / Expected orders



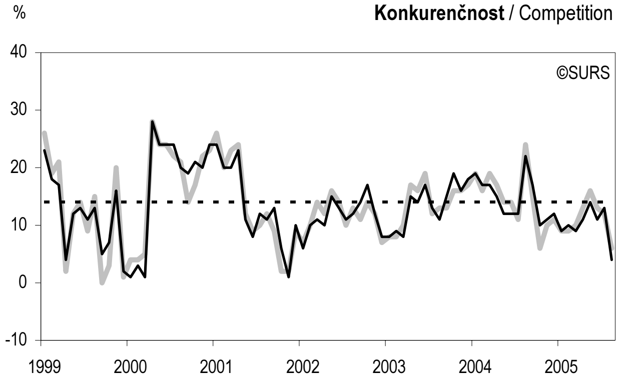
Pričakovano povpraševanje / Expected demand

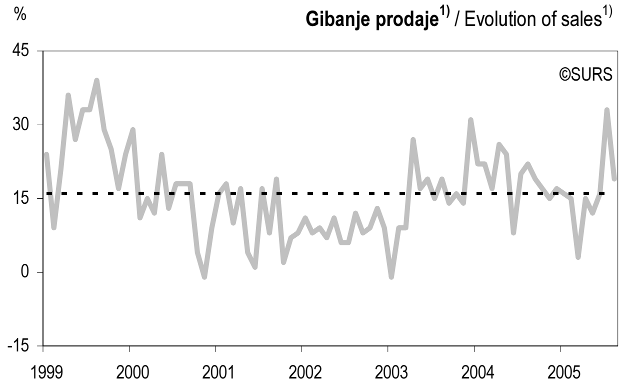


originalni podatki / raw data
desezonirani podatki / seasonally adjusted data
dolgoletno povprečje / long-term average

1) Sezonska komponenta ni prisotna. / No seasonal component.

Ocena konkurenčnosti in gibanje prodaje / Appreciation of competition and evolution of sales

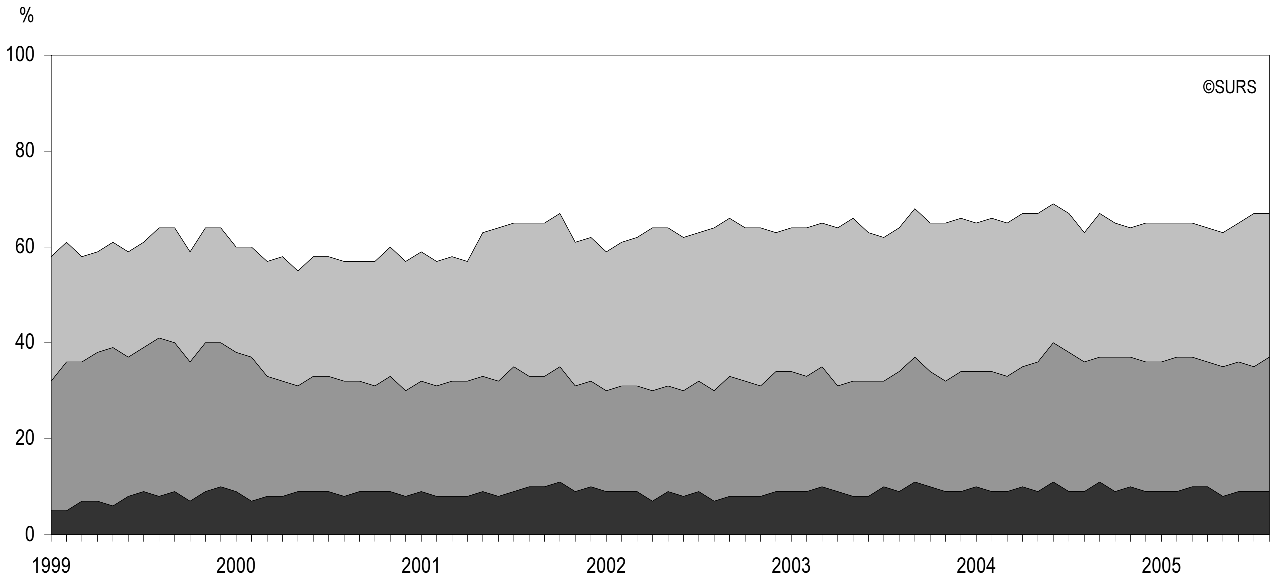




originalni podatki / raw data — desezonirani podatki / seasonally adjusted data — dolgoletno povprečje / long-term average

1) Sezonska komponenta ni prisotna. / No seasonal component.

Omejitveni dejavniki v trgovini na drobno / Obstacles in retail trade



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

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

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

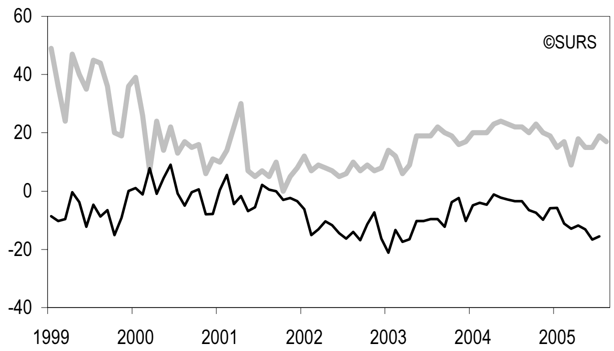
The chart on retail trade obstacles shows the share of enterprises faced with the following groups of problems:

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

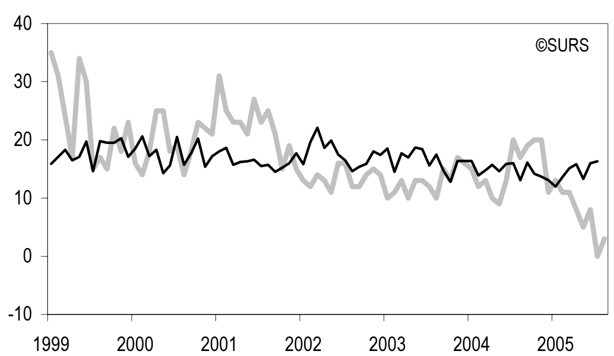
3. GIBANJE EKONOMSKIH KAZALCEV V TRGOVINI NA DROBNO V SLOVENIJI IN EU[1)], JANUAR 1999 - AVGUST 2005
EVOLUTION OF ECONOMIC INDICATORS IN RETAIL TRADE IN SLOVENIA AND EU[1)], JANUARY 1999 - AUGUST 2005

Ocena stanj
Appreciation of situation

% **Poslovni položaj** / Business situation

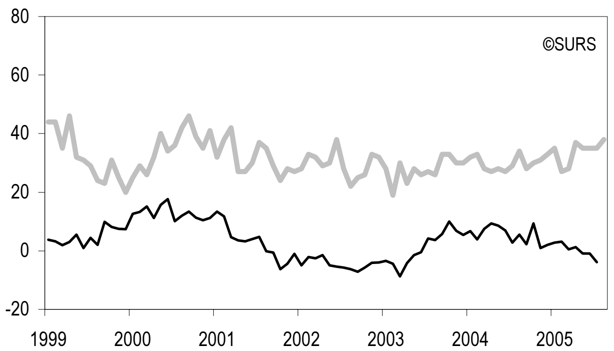


Obseg zalog / Volume of stocks

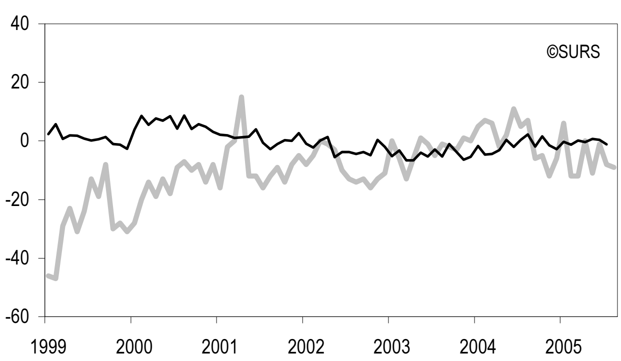


Pričakovanja v naslednjih 3 mesecih
Expectations in the next 3 months

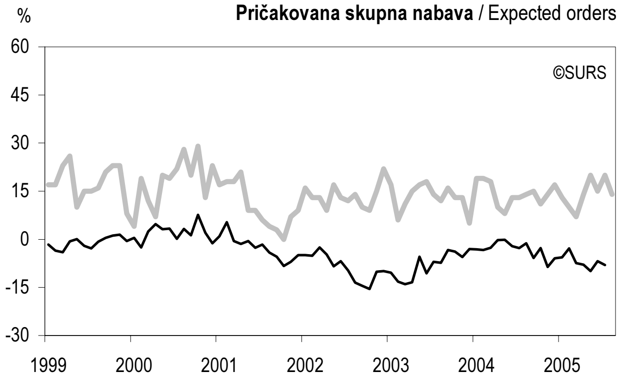
% **Pričakovani poslovni položaj** / Expected business situation



Pričakovano zaposlovanje / Expected employment



Pričakovana skupna nabava / Expected orders



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

1) Podatki o EU za zadnji mesec niso na voljo. Vir podatkov je Evropska komisija (http://europa.eu.int/comm/economy_finance/indicators/businessandconsumersurveys_en.htm).
Data for EU for the last month are not available. Source for EU data is European Commission (http://europa.eu.int/comm/economy_finance/indicators/businessandconsumersurveys_en.htm).

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-ju 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 32 % malih podjetij (ali 39 % prihodka malih podjetij), ki so razvrščena v dejavnost trgovine na drobno ali trgovine z motornimi vozili. Opisani panelni vzorec pokriva 43 % podjetij vzorčnega okvira ali 94 % 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.

The Panel Survey on Business Tendency in Retail Trade is being carried out 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 (SKD) and
- the size of the enterprises (turnover in accordance with the Law on Business Companies).

SOURCES

Respondents answering 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 32% of small enterprises (or 39% of their turnover), the principal activity of which is classified into retail trade and sale of motor vehicles. The panel covers 43% of enterprises of the studied population or 94% 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.

Grafi prikazujejo **desezonirane vrednosti.** To so vrednosti, pri katerih je izločen vpliv sezonskih dejavnikov, 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 2005. Pri pričakovanem povpraševanju se model za leto 2005 zaradi narave podatkov razlikuje od modela za leto 2004. Pri sedanjem poslovnem položaju, obsegu zalog, pričakovanem zaposlovanju, prodajnih cenah, pričakovanih prodajnih cenah, ravni prodaje in gibanju prodaje za to obdobje leta sezonska komponenta ni prisotna.

Kazalec zaupanja je povprečje odgovorov (ravnotežij) na vprašanja o sedanjem in pričakovanem poslovnem položaju ter 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 3 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 mesecih: 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 posojil, 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 the DAINTIES method 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 January 1999 to January 2005. Due to the nature of the data, the 2005 model differs from the 2004 model as regards expected demand. Present business situation, volume of stocks, expected employment, selling prices, selling prices expectations, level of sales and evolution of sales for this period of year have no seasonal component.

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

PUBLISHING

Participants 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 volume 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 higher 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 3 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 avgustu 2005 je bila desezonirana vrednost kazalca zaupanja v trgovini na drobno za 1 odstotno točko nižja kot prejšnji mesec, hkrati pa za 4 odstotne točke višja kot v lanskem avgustu in za prav toliko višja od lanskega povprečja.

COMMENT

In August 2005 the seasonally adjusted retail trade confidence indicator slightly fell in comparison with the previous month, i.e. by 1 percentage point. Compared to August 2004 as well as compared to last year's average it rose by 4 percentage points.

OCENA STANJ

POSLOVNI POLOŽAJ

V avgustu 2005 je vrednost kazalca poslovni položaj padla v vseh treh primerjavah: v primerjavi s preteklim mesecem za 2 odstotni točki, v primerjavi z istim mesecem lanskega leta za 5 odstotnih točk in v primerjavi z lanskim povprečjem za 4 odstotne točke.

PRODAJNE CENE

Vrednost kazalca prodajne cene je bila za 8 odstotnih točk višja kot v juliju 2005. Hkrati pa je bila za 7 odstotnih točk višja kot v lanskem avgustu in za prav toliko višja tudi od lanskega povprečja.

FINANČNI POLOŽAJ

Desezonirana vrednost kazalca finančni položaj je v primerjavi s preteklim mesecem nekoliko padla, in sicer za 1 odstotno točko. V primerjavi z istim mesecem lani se je ta vrednost dvignila za 4 odstotne točke, v primerjavi z lanskim povprečjem pa je ostala nespremenjena.

OBSEG ZALOG

V avgustu 2005 se je kazalec obseg zalog v primerjavi z julijem 2005 povečal za 3 odstotne točke. V primerjavi z avgustom 2004 in z lanskim povprečjem pa se je njegova vrednost zmanjšala, in sicer za 14 oziroma za 12 odstotnih točk.

RAVEN PRODAJE

Vrednost kazalca raven prodaje je v vseh treh primerjavah opazno padla, in sicer v primerjavi z julijem 2005 za 16 odstotnih točk, v primerjavi z avgustom 2004 za 13 odstotnih točk in v primerjavi z lanskim povprečjem za 9 odstotnih točk.

PRIČAKOVANJA

PRIČAKOVANI POSLOVNI POLOŽAJ

Desezonirana vrednost kazalca pričakovani poslovni položaj je bila v avgustu 2005 višja v vseh treh primerjavah: glede na julij 2005 za 3 odstotne točke, glede na avgust 2004 za 4 odstotne točke in glede na lansko povprečje za 8 odstotnih točk.

PRIČAKOVANE PRODAJNE CENE

Vrednost kazalca pričakovane prodajne cene se je opazno izboljšala. V primerjavi s preteklim mesecem se je dvignila za 5 odstotnih točk, v primerjavi z avgustom 2004 se je povzpela za 28 odstotnih točk in bila za 14 odstotnih točk višja od lanskega povprečja.

PRIČAKOVANO ZAPOSLOVANJE

V avgustu 2005 je bila vrednost kazalca pričakovano zaposlovanje za 1 odstotno točko nižja od njegove julijske vrednosti. V primerjavi z avgustom 2004 in v primerjavi z lanskim povprečjem pa je njegova vrednost izrazito padla, in sicer za 16 oziroma za 10 odstotnih točk.

APPRECIATION OF SITUATION

BUSINESS SITUATION

In August 2005 the business situation indicator deteriorated in all three comparisons. Compared to the previous month it went down by 2 percentage points, compared to August 2004 by 5 percentage points and compared to last year's average by 4 percentage points.

SELLING PRICES

In a month-to-month comparison the indicator of the selling prices went up by 8 percentage points compared to July 2005. Its rise (by 7 percentage points) was also recorded in comparison with August 2004 as well as compared to last year's average.

FINANCIAL SITUATION

The seasonally adjusted indicator of the financial situation slightly fell when compared to the previous month, i.e. by 1 percentage point. Compared to August 2004 it was up by 4 percentage points and it remained the same compared to last year's average.

VOLUME OF STOCKS

In August 2005 the volume of stocks indicator rose by 3 percentage points compared to July 2005. Compared to August 2004 and last year's average it plummeted by 14 and by 12 percentage points respectively.

LEVEL OF SALES

The indicator of the level of sales markedly fell in all three comparisons. In comparison with July 2005 it plummeted by 16 percentage points, compared to August 2004 by 13 percentage points and compared to last year's average by 9 percentage points.

EXPECTATIONS

EXPECTED BUSINESS SITUATION

In August 2005 the seasonally adjusted indicator of the expected business situation showed an increase of 3 percentage points compared to July 2005. It was also up in comparison with August 2004 and compared to last year's average, i.e. by 4 and 8 percentage points, respectively.

SELLING PRICES EXPECTATIONS

The selling prices expectations indicator markedly improved. Compared to the previous month it climbed up by 5 percentage points. In comparison to August 2004 it rocketed by 28 percentage points and it was 14 percentage points above last year's average.

EXPECTED EMPLOYMENT

In August 2005 the indicator of the expected employment slid by 1 percentage point in comparison with July 2005. The indicator decreased noticeably compared to August 2004 and to last year's average, i.e. by 16 and by 10 percentage points respectively.

PRIČAKOVANA SKUPNA NABAVA

V avgustu 2005 je bila desezonirana vrednost kazalca pričakovana skupna nabava za 6 odstotnih točk nižja kot v juliju 2005, hkrati pa enaka vrednosti v avgustu 2004 in lanskemu povprečju.

EXPECTED ORDERS

In August 2005 the seasonally adjusted indicator of the expected orders fell by 6 percentage points compared with July 2005. The indicator remained the same compared to August 2004 as well as compared to last year's average.

PRIČAKOVANO POVPRAŠEVANJE

V avgustu 2005 se je desezonirana vrednost kazalca pričakovano povpraševanje nekoliko zvišala v vseh treh primerjavah: v primerjavi s preteklim mesecem za 2 odstotni točki, v primerjavi z istim mesecem lani in v primerjavi z lanskim povprečjem pa za 1 odstotno točko.

EXPECTED DEMAND

In August 2005 the seasonally adjusted indicator of the expected demand slightly improved in all three comparisons. Compared to the previous month it was up by 2 percentage points and compared to August 2004 as well as to last year's average by 1 percentage point.

KONKURENČNOST

Desezonirana vrednost kazalca konkurenčnost je bila za 9 odstotnih točk nižja od vrednosti v preteklem mesecu. Tudi v primerjavi z istim mesecem lani in z lanskim povprečjem je njegova vrednost izrazito padla, in sicer za 18 oziroma za 11 odstotnih točk.

COMPETITION

The seasonally adjusted indicator of the competition showed an enormous overall fall. In comparison with the previous month it plummeted by 9 percentage points, compared to August 2004 by 18 percentage points and compared to last year's average by 11 percentage points.

GIBANJE PRODAJE ZA TO OBDOBJE LETA

V avgustu 2005 vrednosti kazalca gibanje prodaje v primerjavi z julijem 2005 izrazito padla, in sicer za 14 odstotnih točk. V primerjavi z istim mesecem lanskega leta je vrednost tega kazalca padla za 3 odstotne točke, v primerjavi z lanskim povprečjem pa je ostala nespremenjena.

EVOLUTION OF SALES FOR THIS PERIOD OF YEAR

In August 2005 the value of the evolution of sales indicator dropped by 14 percentage points compared to July 2005. In comparison with August 2004 it fell by 3 percentage points and it remained unchanged when compared to last year's average.

OMEJITVENI DEJAVNIKI V TRGOVINI NA DROBNO

V avgustu 2005 se je v trgovini na drobno 33 % podjetij (oz. 25 % prihodka) srečevalo z dejavniki iz skupine *"hude omejitve"*. Delež teh podjetij je v primerjavi s preteklim mesecem ostal nespremenjen, v primerjavi z istim mesecem lanskega leta pa se je zmanjšal za 4 odstotne točke.

Podjetij, ki so se srečevala s skupino dejavnikov *"težave s ponudbo"*, je bilo 30 % (oz. 23 % prihodka), to je za 2 odstotni točki manj kot v preteklem mesecu in za 3 odstotne točke več kot v avgustu 2004.

Podjetij, ki so se srečevala s skupino dejavnikov *"težave s povpraševanjem"*, je bilo 28 % (oz. 35 % prihodka), kar je bilo za 2 odstotni točki več kot v juliju 2005 in za 1 odstotno točko več kot v avgustu 2004.

Podjetij, ki pri svojem poslovanju *niso imela omejitev*, je bilo 9 % (oz. 17 % prihodka) oziroma prav toliko kot v preteklem mesecu in kot v avgustu 2004.

OBSTACLES IN RETAIL TRADE

In August 2005 33% of enterprises in retail trade (25% of turnover) were faced with *"severe obstacles"* in trading. Compared to the previous month the share of these enterprises remained unchanged, while it fell by 4 percentage points compared to the same month last year.

The share of enterprises faced with *"supply difficulties"* was 30% (23% of turnover). This share fell by 2 percentage points compared to the previous month and it rose by 3 percentage points compared to August 2004.

The share of enterprises faced with *"demand difficulties"* was 28% (35% of turnover), which was 2 percentage points more than in July 2005 and 1 percentage point more than in August 2004.

Only 9% of enterprises (17% of turnover) experienced *no obstacles.* The share of these enterprises stayed the same compared to the previous month and compared to August 2004.

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

- 48 % podjetij (ali 53 % prihodka) je omejevala konkurenca v sektorju,
- 39 % podjetij (ali 35 % prihodka) so omejevali visoki stroški dela,
- 32 % podjetij (ali 31 % prihodka) je omejevalo nezadostno povpraševanje,
- 22 % podjetij (ali 25 % prihodka) je omejevala visoka cena denarja,

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

- 48% of enterprises (or 53% of turnover) were limited by competition in their own sector,
- 39% of enterprises (or 35% of turnover) were limited by high cost of labour,
- 32% of enterprises (or 31% of turnover) were limited by insufficient demand,
- 22% of enterprises (or 25% of turnover) were limited by the high cost of money,

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%.

- 13 % podjetij (ali 6 % prihodka) je omejevala premajhna prodajna površina,
- 11 % podjetij (ali 5 % prihodka) je omejevala dostopnost do bančnih posojil,
- 11 % podjetij (ali 4 % prihodka) so omejevali drugi dejavniki, kot so finančna nedisciplina, visoke najemnine, slaba lokacija itd.,
- 9 % podjetij (ali 17 % prihodka) ni imelo omejitev v poslovanju,
- 7 % podjetij (ali 3 % prihodka) so omejevali premajhni skladiščni prostori,
- 3 % podjetij (ali 1 % prihodka) je omejevala slaba ponudba.

- 13% of enterprises (or 6% of turnover) were limited by shortage of sales surface,
- 11% of enterprises (or 5% of turnover) were limited in their access to bank credits,
- 11% of enterprises (or 4% of turnover) were limited by other factors such as lack of financial discipline, high rents, bad location, etc.,
- 9% of enterprises (or 17% of turnover) experienced no obstacles,
- 7% of enterprises (or 3% of turnover) were limited by small storage capacity,
- 3% of enterprises (or 1% of turnover) were limited by supply shortage.

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