STATISTIČNI URAD REPUBLIKE SLOVENIJE
STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA

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8. JULIJ 2005
8 JULY 2005

št./No **187**

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

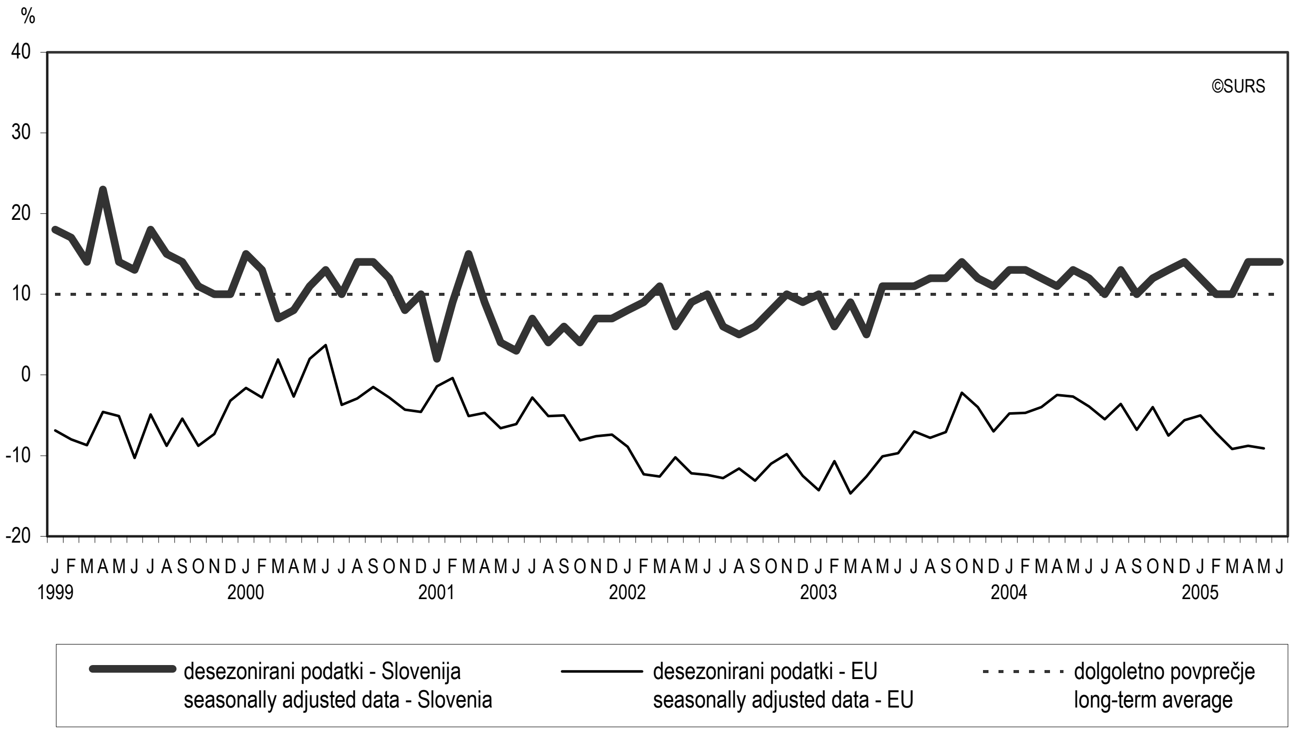
št./No **33**

POSLOVNE TENDENCE V TRGOVINI NA DROBNO, SLOVENIJA, JUNIJ 2005
BUSINESS TENDENCY IN RETAIL TRADE, SLOVENIA, JUNE 2005

- V juniju 2005 je desezonirana vrednost kazalca zaupanja v trgovini na drobno glede na pretekli mesec ostala nespremenjena. Vrednost kazalca se je v primerjavi z lanskim junijem in v primerjavi z lanskim povprečjem dvignila, in sicer za 1 odstotno točko oziroma 2 odstotni točki.
- Na gibanje vrednosti kazalca zaupanja so vplivale ocene o *sedanjem* in *pričakovanem poslovnem položaju* ter *obsegu zalog.*
- Polovica kazalcev stanj se je izboljšala, druga polovica pa poslabšala. Le kazalec poslovni položaj je ostal enak. Večina kazalcev pričakovanj se je poslabšala. Izjema sta bila kazalca pričakovano zaposlovanje in pričakovane prodajne cene, ki sta se izboljšala.

- In June 2005 the seasonally adjusted retail trade confidence indicator remained unchanged compared to the previous month. Compared to June 2004 and to last year's average the indicator went up, i.e. by 1 percentage point and 2 percentage points, respectively.
- This development of the indicator was due to the assessment of *the present* and *expected business situation* as well as to the assessment of *volume of stocks.*
- Half of the situation indicators improved and half of them worsened. Only the indicator of the business situation stayed the same. The expectation indicators mostly worsened. Exceptions were indicators of the expected employment and selling prices expectations which improved.

Slika 1: KAZALEC ZAUPANJA[1)] V SLOVENIJI IN EU[2)] JANUAR 1999 - JUNIJ 2005
Chart 1: CONFIDENCE INDICATOR[1)] IN SLOVENIA AND EU[2)] JANUARY 1999 - JUNE 2005



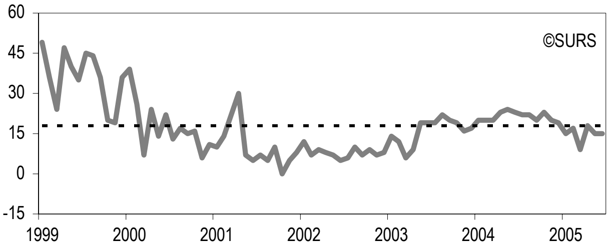
1) Kazalec zaupanja je povprečje odgovorov (ravnotežij) na vprašanja o sedanjem in pričakovanem poslovnem položaju ter sedanjem obsegu zalog (obrnjen predznak).
The confidence indicator is an average of responses (balances) to questions on present and expected business situation and present volume of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

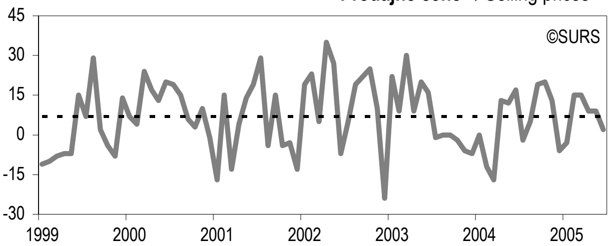
2. GIBANJE EKONOMSKIH KAZALCEV V TRGOVINI NA DROBNO V SLOVENIJI, JANUAR 1999 - JUNIJ 2005
EVOLUTION OF ECONOMIC INDICATORS IN RETAIL TRADE IN SLOVENIA, JANUARY 1999 - JUNE 2005

Ocena stanj
Appreciation of situation

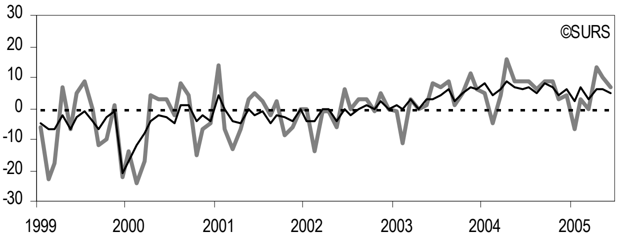
Poslovni položaj[1)] / Business situation[1)]



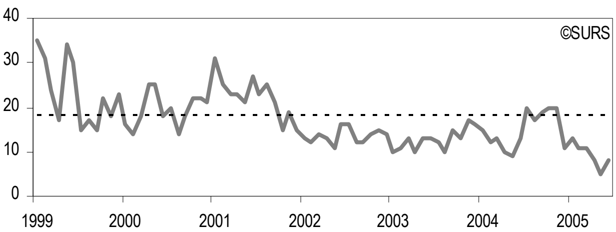
Prodajne cene[1)] / Selling prices[1)]



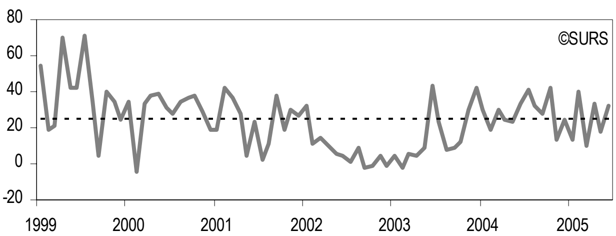
Finančni položaj / Financial situation



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

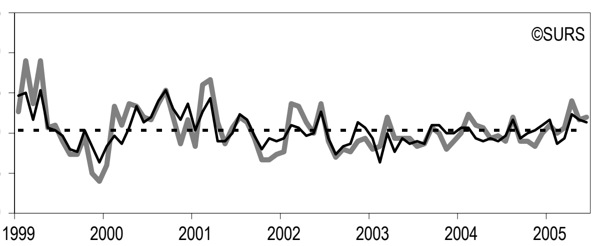


Raven prodaje[1)] / Level of sales[1)]

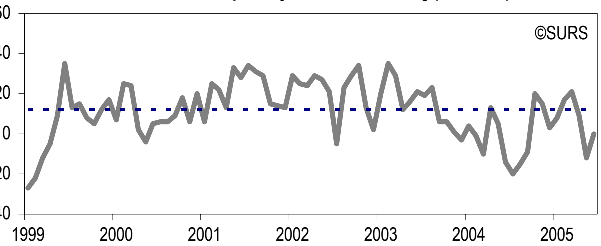


Pričakovanja v naslednjih 3 mesecih
Expectations in the next 3 months

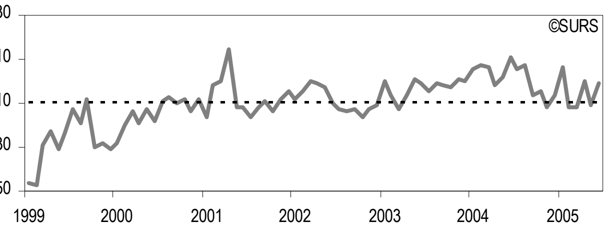
Pričakovani poslovni položaj / Expected business situation



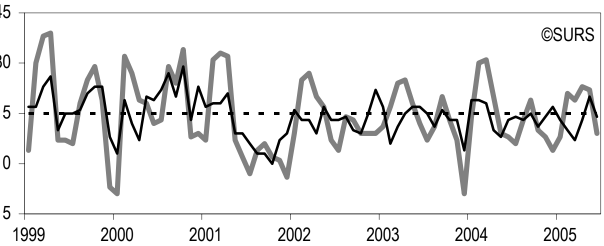
Pričakovane prodajne cene[1)] / Selling prices expectations[1)]



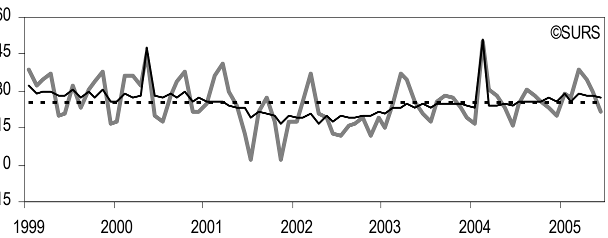
Pričakovano zaposlovanje[1)] / Expected employment[1)]



Pričakovana skupna nabava / Expected orders



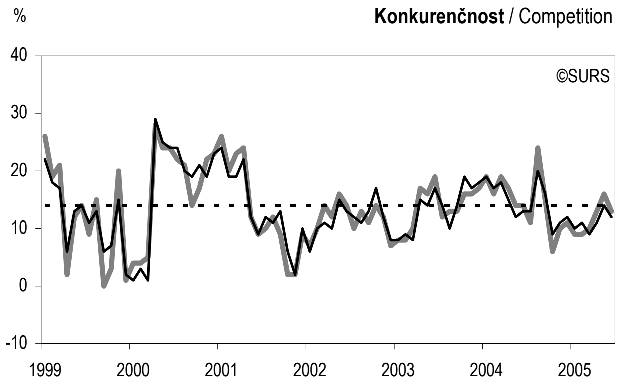
Pričakovano povpraševanje / Expected demand

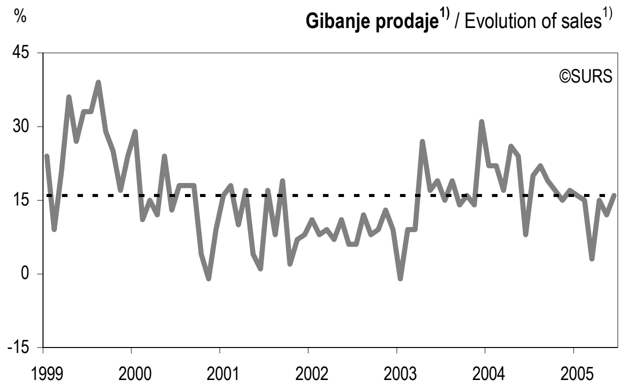


originalni podatki raw data	desezonirani podatki seasonally adjusted data	dolgoletno povprečje long-term average

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

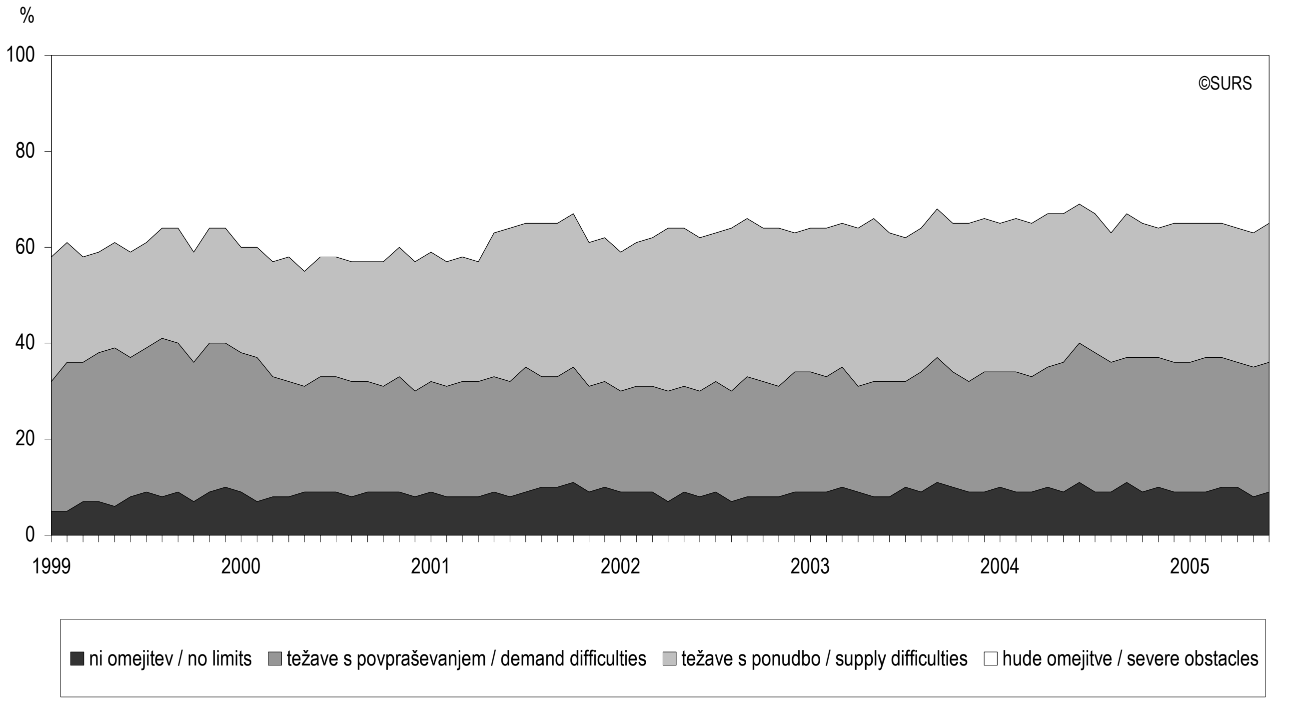
Ocena konkurenčnosti in gibanje prodaje / Appreciation of competition and evolution of sales





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

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 **"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".

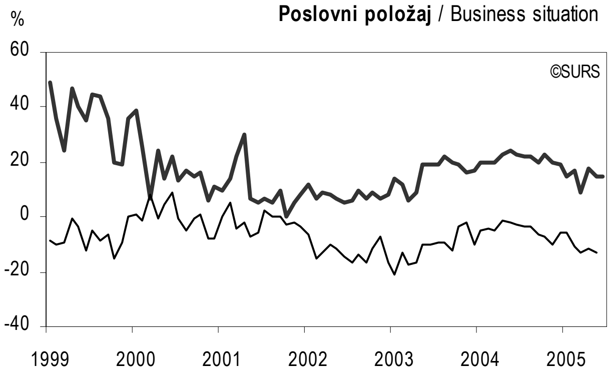
The chart on retail trade obstacles shows the share of enterprises faced with the following groups of problems:

- 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.

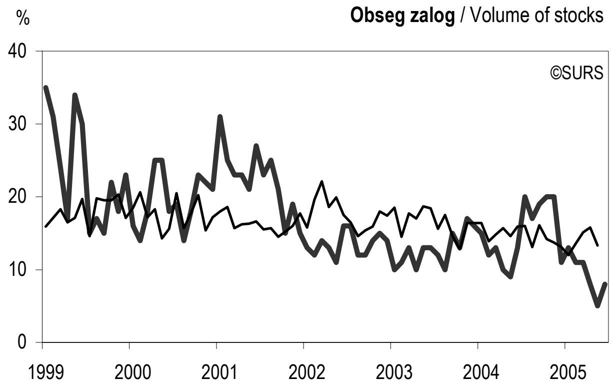
3. GIBANJE EKONOMSKIH KAZALCEV V TRGOVINI NA DROBNO V SLOVENIJI IN EU[1)], JANUAR 1999 - JUNIJ 2005
EVOLUTION OF ECONOMIC INDICATORS IN RETAIL TRADE IN SLOVENIA AND EU[1)], JANUARY 1999 - JUNE 2005

Ocena stanj
Appreciation of situation

Poslovni položaj / Business situation

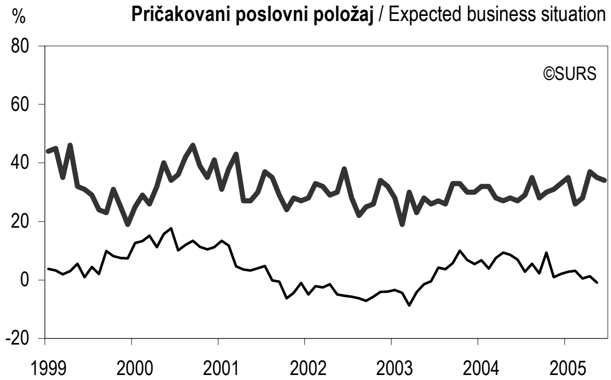


Obseg zalog / Volume of stocks



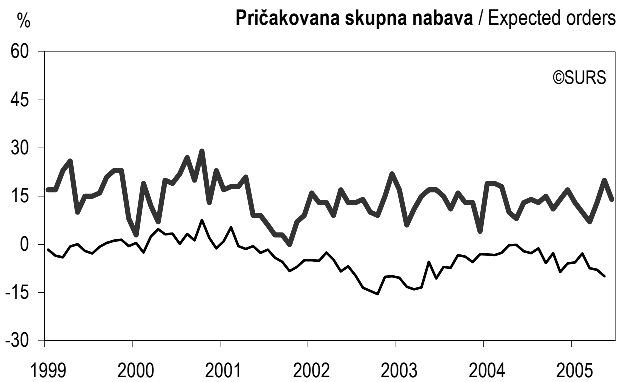
Pričakovanja v naslednjih 3 mesecih
Expectations in the next 3 months

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 juniju 2005 je desezonirana vrednost kazalca zaupanja v trgovini na drobno glede na pretekli mesec ostala nespremenjena. Vrednost kazalca se je v primerjavi z lanskim junijem in v primerjavi z lanskim povprečjem dvignila, in sicer za 1 odstotno točko oziroma 2 odstotni točki.

COMMENT

In June 2005 the seasonally adjusted retail trade confidence indicator remained unchanged compared to the previous month. Compared to June 2004 and to last year's average the indicator went up, i.e. by 1 percentage point and 2 percentage points, respectively.

OCENA STANJ

POSLOVNI POLOŽAJ

V juniju 2005 je vrednost kazalca poslovni položaj ostala enaka kot je bila v preteklem mesecu. V primerjavi z istim mesecem lanskega leta in v primerjavi z lanskim povprečjem je kazalec padel za 8 oziroma 6 odstotnih točk.

PRODAJNE CENE

Vrednost kazalca prodajne cene je v mesečni primerjavi padla, in sicer za 7 odstotnih točk v primerjavi z majem 2005. V primerjavi z istim mesecem lanskega leta in z lanskim povprečjem pa je le-ta padla za 15 odstotnih točk oziroma 3 odstotne točke.

FINANČNI POLOŽAJ

Desezonirana vrednost kazalca finančni položaj se je v vseh treh primerjavah malo zmanjšala. V primerjavi s preteklim mesecem se je le-ta zmanjšala za 1 odstotno točko, v primerjavi z istim mesecem lani za 2 odstotni točki in v primerjavi z lanskim povprečjem za 1 odstotno točko.

OBSEG ZALOG

Kazalec obseg zalog se je v primerjavi z majem 2005 dvignil za 3 odstotne točke. V primerjavi z junijem 2004 in lanskim povprečjem je vrednost tega kazalca padla za 5 oziroma za 7 odstotnih točk.

RAVEN PRODAJE

Vrednost kazalca raven prodaje je v primerjavi z majem 2005 zrasla za 14 odstotnih točk. V primerjavi z junijem 2004 je njegova vrednost padla za 1 odstotno točko in se v primerjavi z lanskim povprečjem dvignila za 4 odstotne točke.

APPRECIATION OF SITUATION

BUSINESS SITUATION

In June 2005 the business situation indicator stayed the same as it was in the previous month. Compared to June 2004 and to last year’s average it fell by 8 and by 6 percentage points, respectively.

SELLING PRICES

In a month-to-month comparison the indicator of the selling prices fell by 7 percentage points compared to May 2005. Its fall was also recorded in comparison with June 2004 and with last year’s average, i.e. by 15 and by 3 percentage points, respectively.

FINANCIAL SITUATION

The seasonally adjusted indicator of the financial situation slightly decreased in all three comparisons. Compared to the previous month it went down by 1 percentage point, compared to June 2004 by 2 percentage points and compared to last year’s average by 1 percentage point.

VOLUME OF STOCKS

The volume of stocks indicator went up by 3 percentage points compared to May 2005. Compared to June 2004 and to last year’s average it fell by 5 and by 7 percentage points, respectively.

LEVEL OF SALES

The indicator of the level of sales climbed up by 14 percentage points compared to May 2005. Compared to June 2004 it went down by 1 percentage point and it rose by 4 percentage points compared to last year’s average.

PRIČAKOVANJA

PRIČAKOVANI POSLOVNI POLOŽAJ

Desezonirana vrednost kazalca pričakovani poslovni položaj je v primerjavi z majem 2005 nekoliko padla (za 1 odstotno točko). V primerjavi z junijem 2004 se je vrednost dvignila za 7 odstotnih točk in v primerjavi z lanskim povprečjem za 4 odstotne točke.

PRIČAKOVANE PRODAJNE CENE

Vrednost kazalca pričakovane prodajne cene se je opazno izboljšala. V primerjavi s preteklim mesecem se je vrednost dvignila za 12 odstotnih točk, v primerjavi z junijem 2004 za 14 odstotnih točk in je bila 1 odstotno točko nad lanskim povprečjem.

PRIČAKOVANO ZAPOSLOVANJE

V juniju 2005 se je vrednost kazalca pričakovano zaposlovanje v primerjavi z majem 2005 izrazito dvignila, in sicer za 10 odstotnih točk. V primerjavi z junijem 2004 pa je njegova vrednost padla za 12 odstotnih točk oziroma za 2 odstotni točki v primerjavi z lanskim povprečjem.

EXPECTATIONS

EXPECTED BUSINESS SITUATION

The seasonally adjusted indicator of the expected business situation showed a small decline (by 1 percentage point) compared to May 2005. In comparison with June 2004 it rose by 7 percentage points and compared to last year’s average by 4 percentage points.

SELLING PRICES EXPECTATIONS

The selling prices expectations indicator markedly improved. Compared to the previous month it rocketed by 12 percentage points, compared to June 2004 by 14 percentage points and it was 1 percentage point above last year’s average.

EXPECTED EMPLOYMENT

In June 2005 the indicator of the expected employment increased noticeably in comparison with May 2005, i.e. by 10 percentage points. In comparison with June 2004 it dropped by 12 percentage points and in comparison with last year’s average by 2 percentage points.

PRIČAKOVANA SKUPNA NABAVA

V primerjavi z majem 2005 je bila desezonirana vrednost kazalca pričakovana skupna nabava v juniju 2005 nižja za 6 odstotnih točk. V primerjavi z junijem 2004 je bila ta vrednost višja za 1 odstotno točko in je ostala enaka v primerjavi z lanskim povprečjem.

PRIČAKOVANO POVPRAŠEVANJE

V juniju 2005 je desezonirana vrednost kazalca pričakovano povpraševanje padla za 1 odstotno točko v primerjavi s preteklim mesecem. V primerjavi z istim mesecem lani je bila njegova vrednost višja za 6 odstotnih točk in se ni spremenila glede na lansko povprečje.

KONKURENČNOST

Desezonirana vrednost kazalca konkurenčnost je padla v vseh treh primerjavah. Padec za 2 odstotni točki je bil zabeležen v primerjavi s preteklim mesecem, v primerjavi z istim mesecem lani je njegova vrednost padla za 1 odstotno točko in bila 3 odstotne točke pod lanskim povprečjem.

GIBANJE PRODAJE ZA TO OBDOBJE LETA

Vrednost kazalca gibanje prodaje za to obdobje leta je bila za 4 odstotne točke višja kot v maju 2005. V primerjavi z istim mesecem lanskega leta se je njegova vrednost dvignila za 8 odstotnih točk, medtem ko je glede na lansko povprečje padla za 3 odstotne točke.

OMEJITVENI DEJAVNIKI V TRGOVINI NA DROBNO

V trgovini na drobno se je 35 % podjetij (oz. 25 % prihodka) srečevalo z dejavniki iz skupine *"hude omejitve".* Delež teh podjetij je v primerjavi s preteklim mesecem padel za 2 odstotni točki, medtem ko se je v primerjavi z istim mesecem lanskega leta dvignil za 4 odstotne točke.

Podjetij, ki so se srečevala s skupino dejavnikov *"težave s ponudbo",* je bilo 29 % (oz. 23 % prihodka). Delež teh podjetij se je glede na pretekli mesec dvignil za 1 odstotno točko in ostal enak v primerjavi z istim mesecem lanskega leta.

Podjetij, ki so se srečevala s skupino dejavnikov *"težave s povpraševanjem",* je bilo 27 % (oz. 30 % prihodka), kar je bilo enako kot v maju 2005 in za 2 odstotni točki manj kot v juniju 2004.

Podjetij, ki *niso imela omejitev* v poslovanju, je bilo 9 % (oz. 22 % prihodka). Delež teh podjetij je bil glede na pretekli mesec višji za 1 odstotno točko in za 2 odstotni točki nižji kot v juniju 2004.

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

- 50 % podjetij (ali 46 % prihodka) je omejevala konkurenca v sektorju,
- 40 % podjetij (ali 36 % prihodka) so omejevali visoki stroški dela,
- 30 % podjetij (ali 29 % prihodka) je omejevalo nezadostno povpraševanje,
- 22 % podjetij (ali 24 % prihodka) je omejevala visoka cena denarja,

EXPECTED ORDERS

In comparison with May 2005 the seasonally adjusted indicator of the expected orders fell by 6 percentage points in June 2005. Compared to June 2004 it went up by 1 percentage point and it remained the same compared to last year's average.

EXPECTED DEMAND

In June 2005 the seasonally adjusted indicator of the expected demand went down by 1 percentage point compared to the previous month. Compared to June 2004 its value grew by 6 percentage points and it remained unchanged compared to last year's average.

COMPETITION

The seasonally adjusted indicator of the competition showed an overall decrease. A fall by 2 percentage points was recorded in comparison with last month, compared to June 2004 it went down by 1 percentage point and it was 3 percentage points below last year's average.

EVOLUTION OF SALES FOR THIS PERIOD OF YEAR

The value of the evolution of sales indicator increased by 4 percentage points compared to May 2005. Compared to the same month previous year it rose by 8 percentage points, while it slid by 3 percentage points in comparison with last year's average.

OBSTACLES IN RETAIL TRADE

In retail trade 35% of enterprises (25% of turnover) were faced with *"severe obstacles"* in trading. Compared to the previous month the share of these enterprises fell by 2 percentage points, while it rose by 4 percentage points compared to the same month last year.

The share of enterprises faced with *"supply difficulties"* was 29% (23% of turnover). This share rose by 1 percentage point compared to the previous month and it remained the same compared to June 2004.

The share of enterprises faced with *"demand difficulties"* was 27% (30% of turnover), which was the same as it was in May 2005 and 2 percentage points less than in June 2004.

Only 9% of enterprises (22% of turnover) experienced *no obstacles.* The share of these enterprises was 1 percentage point higher compared to the previous month and 2 percentage points lower compared to June 2004.

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

- 50% of enterprises (or 46% of turnover) were limited by competition in their own sector,
- 40% of enterprises (or 36% of turnover) were limited by high cost of labour,
- 30% of enterprises (or 29% of turnover) were limited by insufficient demand,
- 22% of enterprises (or 24% 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 7 % prihodka) je omejevala premajhna prodajna površina,
- 12 % podjetij (ali 3 % prihodka) so omejevali drugi dejavniki, kot so finančna nedisciplina, visoke najemnine, slaba lokacija itd.,
- 9 % podjetij (ali 22 % prihodka) ni imelo omejitev v poslovanju,
- 9 % podjetij (ali 4 % prihodka) je omejevala dostopnost do bančnih posojil,
- 7 % podjetij (ali 4 % prihodka) so omejevali premajhni skladiščni prostori,
- 2 % podjetij (ali 0 % prihodka) je omejevala slaba ponudba.

- 13% of enterprises (or 7% of turnover) were limited by shortage of sales surface,
- 12% of enterprises (or 3% of turnover) were limited by other factors such as lack of financial discipline, high rents, bad location, etc.,
- 9% of enterprises (or 22% of turnover) experienced no obstacles,
- 9% of enterprises (or 4% of turnover) were limited in their access to bank credits,
- 7% of enterprises (or 4% of turnover) were limited by small storage capacity,
- 2% of enterprises (or 0% of turnover) were limited by supply shortage.

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