STATISTIČNI URAD REPUBLIKE SLOVENIJE
STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA

STATISTIČNE INFORMACIJE
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6. MAJ 2005
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št./No 123

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

št./No 20

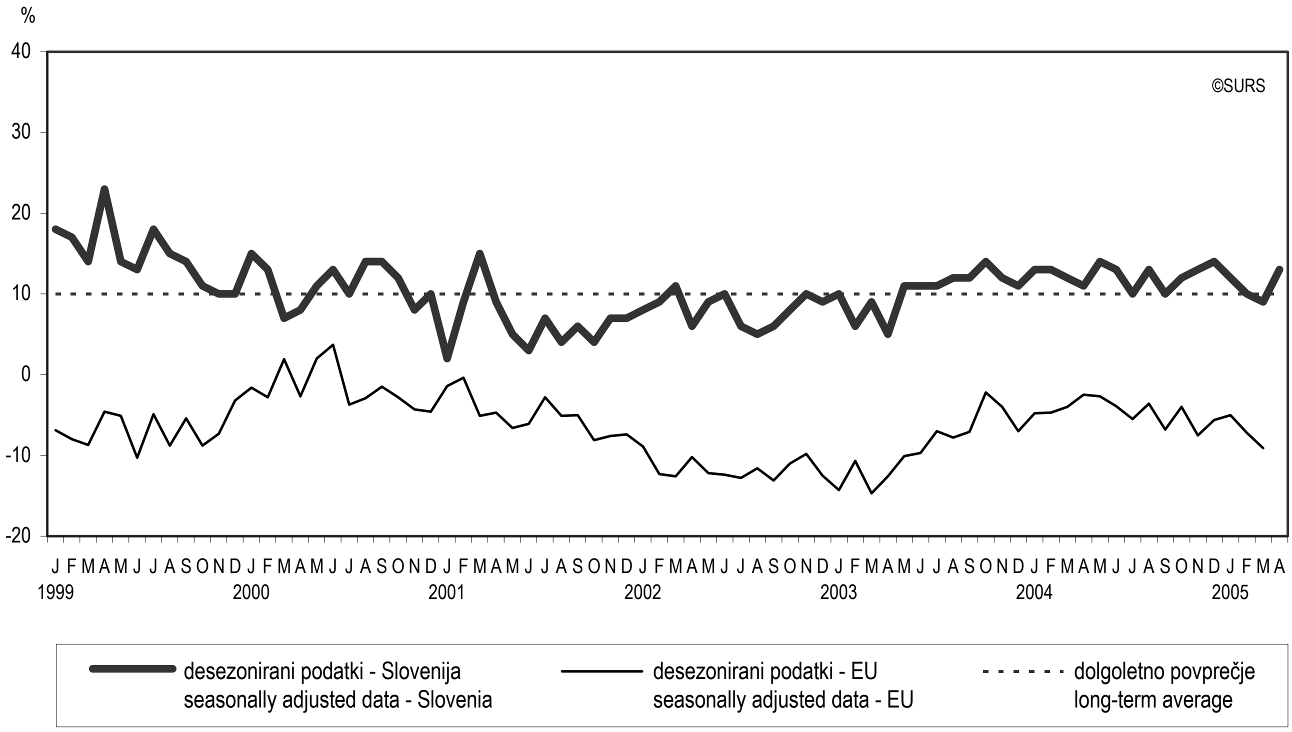
POSLOVNE TENDENCE V TRGOVINI NA DROBNO, SLOVENIJA, APRIL 2005

BUSINESS TENDENCY IN RETAIL TRADE, SLOVENIA, APRIL 2005

- V aprilu 2005 se je desezonirana vrednost kazalca zaupanja v trgovini na drobno glede na pretekli mesec dvignila za 4 odstotne točke. Vrednost kazalca se je dvignila tudi v primerjavi z lanskim aprilom in v primerjavi z lanskim povprečjem, in sicer za 2 odstotni točki oziroma 1 odstotno točko.
- Na dvig vrednosti kazalca zaupanja sta vplivali boljši oceni *sedanjega* in *pričakovanega poslovnega položaja* ter ocena o zmanjšanem *obsegu zalog*.
- Večina kazalcev stanj se je izboljšala, le kazalca obseg zalog in prodajne cene sta se poslabšala. Tudi večina kazalcev pričakovanj se je izboljšala, razen kazalcev pričakovane prodajne cene in pričakovano povpraševanje, ki sta se poslabšala.

- In April 2005 the seasonally adjusted retail trade confidence indicator showed an increase compared to the previous month, i.e. by 4 percentage points. The indicator also went up compared to April 2004 and to last year's average, i.e. by 2 percentage points and 1 percentage point, respectively.
- This rise of the confidence indicator was determined by the improvement in the assessment of the *present* and *expected business situation* as well as by the assessment of the lower *volume of stocks.*
- Situation indicators mostly improved. Only the indicators of the volume of stocks and the selling prices worsened. The expectation indicators mostly improved also. Exceptions were indicators of the expected selling prices and expected demand, which worsened.

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



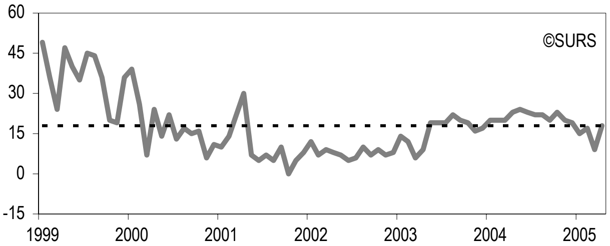
1) Kazalec zaupanja je povprečje ravnotežij na vprašanja o sedanjem in pričakovanem poslovnem položaju ter sedanjem obsegu zalog (obrnjen predznak).
The confidence indicator is an average of responses (balances) to questions on present and expected business situation and present volume of stocks (the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

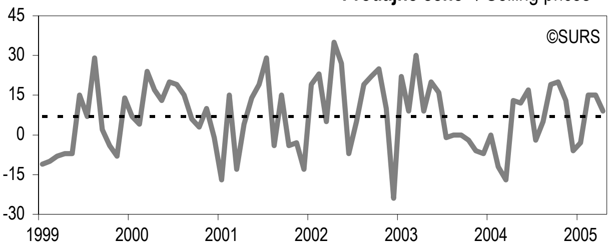
2. GIBANJE EKONOMSKIH KAZALCEV V TRGOVINI NA DROBNO V SLOVENIJI, JANUAR 1999 -APRIL 2005
EVOLUTION OF ECONOMIC INDICATORS IN RETAIL TRADE IN SLOVENIA, JANUARY 1999 - APRIL 2005

Ocena stanj
Appreciation of situation

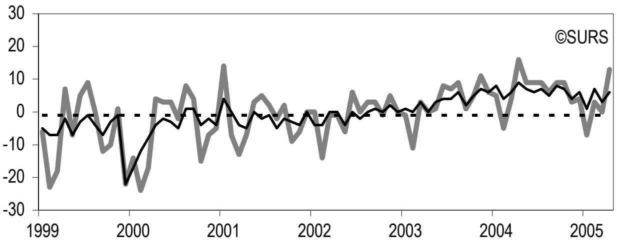
Poslovni položaj[1] / Business situation[1]



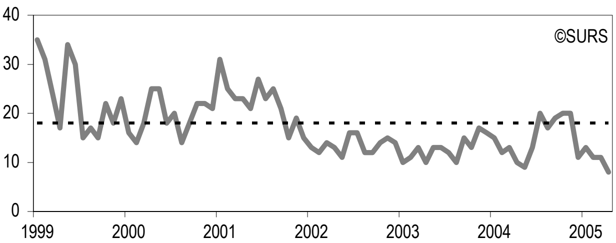
Prodajne cene[1] / Selling prices[1]



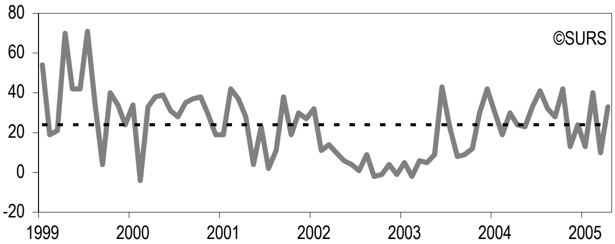
Finančni položaj / Financial situation



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

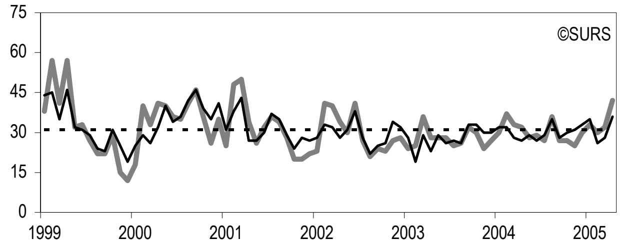


Raven prodaje[1] / Level of sales[1]

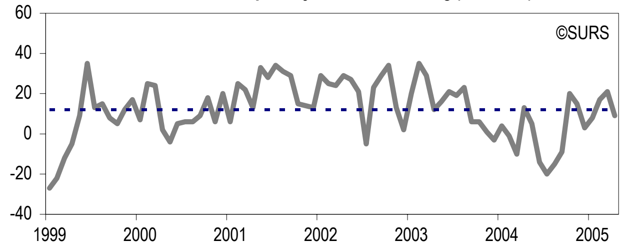


Pričakovanja v naslednjih 3 mesecih
Expectations in the next 3 months

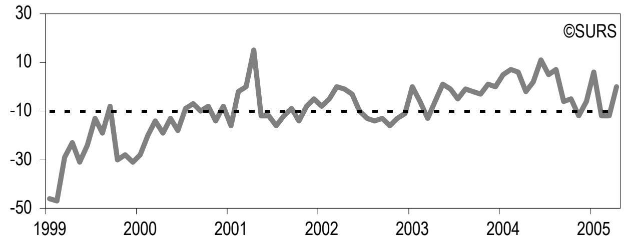
Pričakovani poslovni položaj / Exected business situation



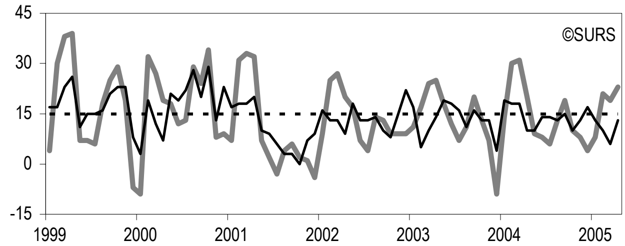
Pričakovane prodajne cene[1] / Selling prices expectations[1]



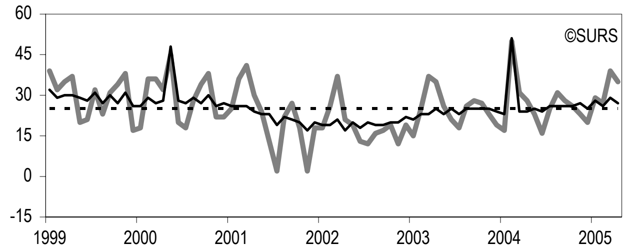
Pričakovano zaposlovanje[1] / Expected employment[1]



Pričakovana skupna nabava / Expected orders



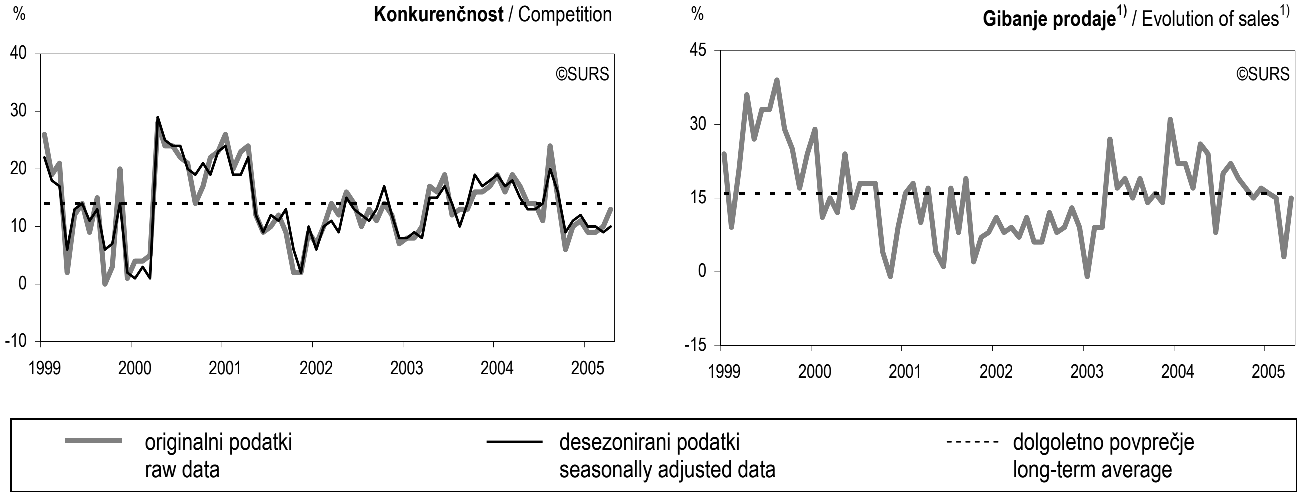
Pričakovano povpraševanje / Expected demand



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

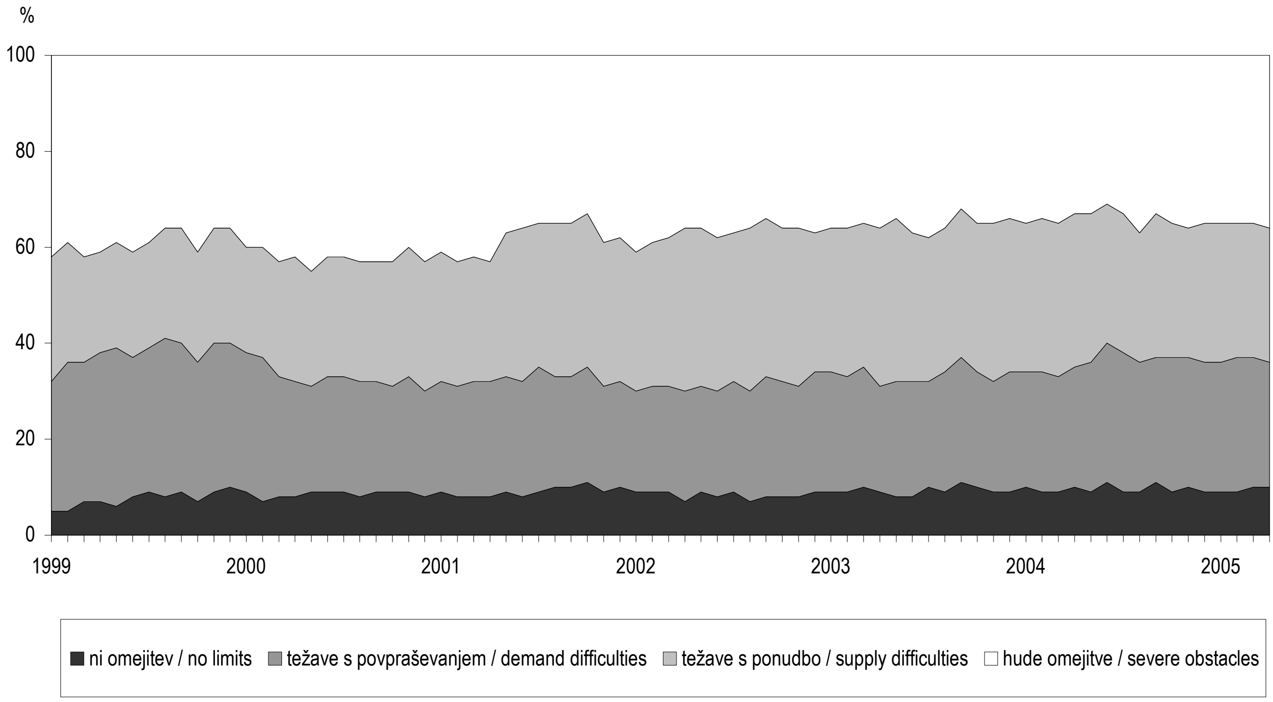
1) Sezonska komponenta ni prisotna. / No seasonal component.

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".

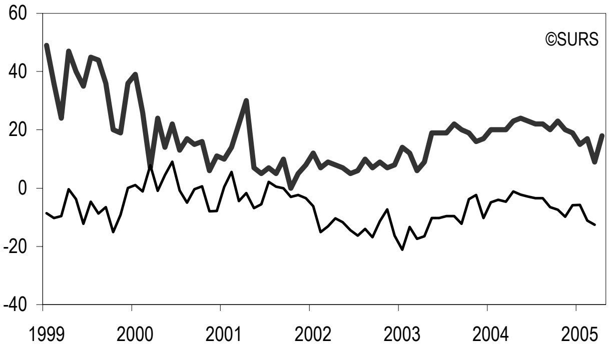
The chart on retail trade obstacles shows the share of enterprises faced with the following groups of problems:

- 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.

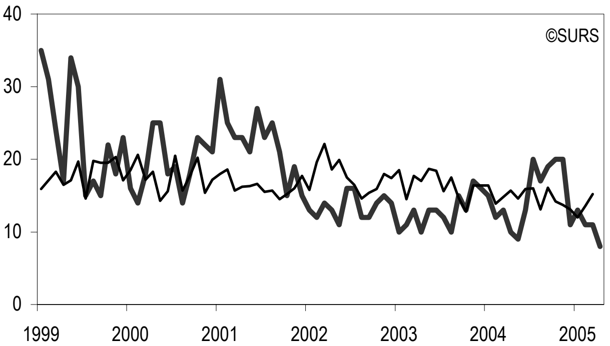
3. GIBANJE EKONOMSKIH KAZALCEV V TRGOVINI NA DROBNO V SLOVENIJI IN EU[1)], JANUAR 1999 - APRIL 2005
EVOLUTION OF ECONOMIC INDICATORS IN RETAIL TRADE IN SLOVENIA AND EU[1)], JANUARY 1999 - APRIL 2005

Ocena stanj
Appreciation of situation

Poslovni položaj / Business situation

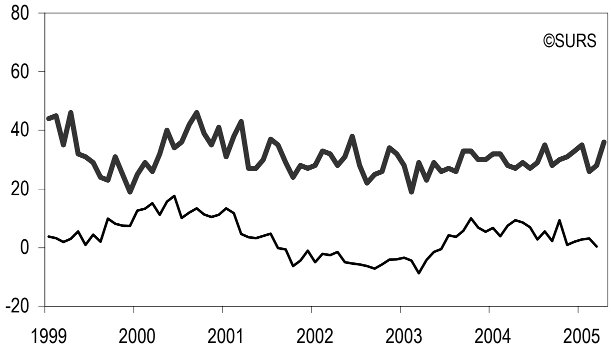


Obseg zalog / Volume of stocks



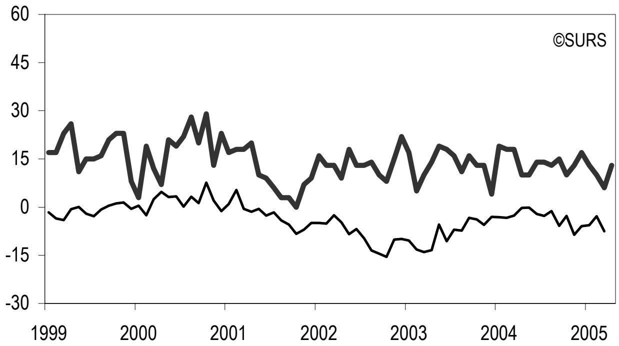
Pričakovanja v naslednjih 3 mesecih
Expectations in the next 3 months

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) 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. Podatki so desezonirani.
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. 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-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 trgovini 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 (SCA) 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 SCA 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.

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.

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.

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.

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

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).

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).

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).

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?

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 aprilu 2005 se je desezonirana vrednost kazalca zaupanja v trgovini na drobno glede na pretekli mesec dvignila za 4 odstotne točke. Na dvig vrednosti kazalca zaupanja sta vplivali boljši oceni sedanjega in pričakovanega poslovnega položaja ter ocena o zmanjšanem obsegu zalog. Vrednost kazalca se je dvignila tudi v primerjavi z lanskim aprilom in v primerjavi z lanskim povprečjem, in sicer za 2 odstotni točki oziroma 1 odstotno točko.

OCENA STANJ

POSLOVNI POLOŽAJ

V aprilu 2005 se je kazalec poslovni položaj dvignil za 9 odstotnih točk v primerjavi s preteklim mesecem. V primerjavi z istim mesecem lanskega leta in v primerjavi z lanskim povprečjem pa je padel za 5 odstotnih točk oziroma 3 odstotne točke.

PRODAJNE CENE

Vrednost kazalca prodajne cene se je v mesečni primerjavi znižala za 6 odstotnih točk. Padec vrednosti za 4 odstotne točke je bil zabeležen v primerjavi z istim mesecem lanskega leta, medtem ko se je le-ta v primerjavi z lanskim povprečjem dvignila za 4 odstotne točke.

FINANČNI POLOŽAJ

Desezonirana vrednost kazalca finančni položaj je bila v primerjavi s preteklim mesecem višja za 3 odstotne točke. V primerjavi z aprilom 2004 je vrednost padla za 3 odstotne točke in se ni spremenila glede na lanskoletno povprečje.

OBSEG ZALOG

Obseg zalog se je v vseh treh primerjavah zmanjšal. V primerjavi s preteklim mesecem se je zmanjšal za 3 odstotne točke, v primerjavi z istim mesecem lani za 2 odstotni točki in v primerjavi z lanskim povprečjem za 7 odstotnih točk.

RAVEN PRODAJE

Vrednost kazalca raven prodaje se je dvignila v primerjavi s preteklim mesecem za 23 odstotnih točk. V primerjavi z aprilom 2004 je bila vrednost višja za 9 odstotnih točk in v primerjavi z lanskim povprečjem za 5 odstotnih točk.

PRIČAKOVANJA

PRIČAKOVANI POSLOVNI POLOŽAJ

V splošnem se je desezonirana vrednost kazalca pričakovani poslovni položaj dvignila. V primerjavi z marcem 2005 se je dvignila za 8 odstotnih točk, v primerjavi z aprilom 2004 za 10 odstotnih točk in v primerjavi z lanskim povprečjem za 6 odstotnih točk.

PRIČAKOVANE PRODAJNE CENE

Vrednost kazalca pričakovane prodajne cene se je v primerjavi s preteklim mesecem poslabšala za 12 odstotnih točk. V primerjavi z aprilom 2004 je vrednost padla za 4 odstotne točke in bila 10 odstotnih točk nad lanskim povprečjem.

COMMENT

In April 2005 the seasonally adjusted retail trade confidence indicator showed an increase compared to the previous month, i.e. by 4 percentage points. This rise was due to the improvement in the assessment of the present and expected business situation as well as by the assessment of the lower volume of stocks. The indicator also went up compared to April 2004 and to last year's average, i.e. by 2 percentage points and 1 percentage point, respectively.

APPRECIATION OF SITUATION

BUSINESS SITUATION

In April 2005 the business situation indicator increased by 9 percentage points compared to the previous month. However, it went down in comparison with April 2004 and last year's average, i.e. by 5 and 3 percentage points, respectively.

SELLING PRICES

In a month-to-month comparison the indicator of the selling prices went down by 6 percentage points. A fall of the indicator by 4 percentage points was recorded in comparison with April 2004, while it went up in comparison with last year's average by 4 percentage points.

FINANCIAL SITUATION

The seasonally adjusted indicator of the financial situation rose by 3 percentage points compared to the previous month. Compared to April 2004 it fell by 3 percentage points and it remained unchanged compared to last year's average.

VOLUME OF STOCKS

The volume of stocks decreased in all three comparisons. Compared to the previous month it went down by 3 percentage points, compared to April 2004 by 2 percentage points and compared to last year's average by 7 percentage points.

LEVEL OF SALES

The indicator of the level of sales rocketed compared to the previous month by 23 percentage points. Compared to April 2004 it rose by 9 percentage points and compared to last year's average by 5 percentage points.

EXPECTATIONS

EXPECTED BUSINESS SITUATION

The seasonally adjusted indicator of the expected business situation showed an overall increase. Compared to March 2005 it increased by 8 percentage points, compared to April 2004 by 10 percentage points and compared to last year's average by 6 percentage points.

SELLING PRICES EXPECTATIONS

The selling prices expectations indicator markedly worsened compared to the previous month as its value dropped by 12 percentage points. In comparison with April 2004 it fell by 4 percentage points and it was 10 percentage points above last year's average.

PRIČAKOVANO ZAPOSLOVANJE

V aprilu 2005 se je vrednost kazalca pričakovano zaposlovanje dvignila za 12 odstotnih točk. V primerjavi z aprilom 2004 je bila vrednost višja za 2 odstotni točki in 1 odstotno točko pod lanskim povprečjem.

PRIČAKOVANA SKUPNA NABAVA

V primerjavi z marcem 2005 je bila desezonirana vrednost kazalca pričakovana skupna nabava višja za 7 odstotnih točk. V primerjavi z aprilom 2004 je bila vrednost višja za 3 odstotne točke, v primerjavi z lanskim povprečjem pa se je znižala za 1 odstotno točko.

PRIČAKOVANO POVPRAŠEVANJE

V aprilu 2005 je bilo zabeleženo poslabšanje desezonirane vrednosti kazalca pričakovano povpraševanje, in sicer za 2 odstotni točki. V primerjavi z istim mesecem lani je bila njegova vrednost višja za 7 odstotnih točk in je ostala enaka v primerjavi z lanskim povprečjem.

KONKURENČNOST

Desezonirana vrednost kazalca konkurenčnost se je rahlo dvignila (za 1 odstotno točko) v primerjavi s preteklim mesecem. V primerjavi z istim mesecem lani in z lanskim povprečjem je njegova vrednost padla, in sicer za 4 odstotne točke oziroma 5 odstotnih točk.

GIBANJE PRODAJE ZA TO OBDOBJE LETA

Vrednost kazalca gibanje prodaje za to obdobje leta je bila višja (za 12 odstotnih točk) v primerjavi z marcem 2005. Po drugi strani, se je njegova vrednost opazno znižala (za 11 odstotnih točk) v primerjavi z istim mesecem lanskega leta in padla za 4 odstotne točke glede na lansko povprečje.

OMEJITVENI DEJAVNIKI V TRGOVINI NA DROBNO

V trgovini na drobno se je 36 % podjetij (oz. 26 % prihodka) srečevalo z dejavniki iz skupine *"hude omejitve"*. Delež teh podjetij se je v primerjavi s preteklim mesecem in tudi v primerjavi z istim mesecem lanskega leta dvignil za 1 odstotno točko oziroma 3 odstotne točke.

Podjetij, ki so se srečevala s skupino dejavnikov *"težave s ponudbo"*, je bilo 28 % (oz. 22 % prihodka). Delež teh podjetij je bil enak kot v preteklem mesecu, medtem ko je glede na isti mesec lanskega leta padel za 4 odstotne točke.

Podjetij, ki so se srečevala s skupino dejavnikov *"težave s povpraševanjem"*, je bilo 26 % (oz. 34 % prihodka), kar je bilo za 1 odstotno točko manj kot v preteklem mesecu in za 1 odstotno točko več kot v lanskem aprilu.

Podjetij, ki *niso imela omejitev* v poslovanju, je bilo 10 % (oz. 18 % prihodka). Delež teh podjetij je ostal enak tako glede na pretekli mesec kot tudi glede na april 2004.

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

- 47 % podjetij (ali 52 % prihodka) je omejevala konkurenca v sektorju,
- 39 % podjetij (ali 35 % prihodka) so omejevali visoki stroški dela,
- 32 % podjetij (ali 29 % prihodka) je omejevalo nezadostno povpraševanje,
- 21 % podjetij (ali 24 % prihodka) je omejevala visoka cena denarja,

EXPECTED EMPLOYMENT

In April 2005 the indicator of the expected employment went up by 12 percentage points. In comparison with April 2004 it rose by 2 percentage points and it was 1 percentage point below last year's average.

EXPECTED ORDERS

In comparison with March 2005 the seasonally adjusted indicator of the expected orders increased by 7 percentage points. Compared to April 2004 it went up by 3 percentage points and compared to last year's average it slid by 1 percentage point.

EXPECTED DEMAND

In April 2005 a fall of the seasonally adjusted indicator of the expected demand was recorded, i.e. by 2 percentage points. In comparison with April 2004 it rose by 7 percentage points and it remained the same in comparison with last year's average.

COMPETITION

The seasonally adjusted indicator of the competition went up slightly (by 1 percentage point) compared to the previous month. Compared to April 2004 and to last year's average its value fell, i.e. by 4 and 5 percentage points, respectively.

EVOLUTION OF SALES FOR THIS PERIOD OF YEAR

The value of the evolution of sales indicator rose significantly (by 12 percentage points) compared to March 2005. On the other hand, it noticeably worsened (by 11 percentage points) compared to the same month previous year and it fell by 4 percentage points in comparison with last year's average.

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 and to the same month of the last year the share of these enterprises rose, i.e. by 1 and 3 percentage points, respectively.

The share of enterprises faced with *"supply difficulties"* was 28% (22% of turnover). This share was the same as in the previous month while it fell by 4 percentage points compared to April 2004.

The share of enterprises faced with *"demand difficulties"* was 26% (34% of turnover), which was 1 percentage point less than in the previous month and 1 percentage point more than in April 2004.

Only 10% of enterprises (18% of turnover) experienced *no obstacles.* The share of these enterprises remained the same as in the previous month and in April 2004.

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

- 47% of enterprises (or 52% of turnover) were limited by competition in own sector,
- 39% of enterprises (or 35% of turnover) were limited by high cost of labour,
- 32% of enterprises (or 29% of turnover) were limited by insufficient demand,
- 21% of enterprises (or 24% of turnover) were limited by 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%.

- 14 % podjetij (ali 7 % prihodka) je omejevala premajhna prodajna površina,
- 12 % podjetij (ali 8 % prihodka) je omejevala dostopnost do bančnih posojil,
- 12 % podjetij (ali 4 % prihodka) so omejevali drugi dejavniki, kot so finančna nedisciplina, visoke najemnine, slaba lokacija itd.,
- 11 % podjetij (ali 18 % prihodka) ni imelo omejitev v poslovanju,
- 7 % podjetij (ali 4 % prihodka) so omejevali premajhni skladiščni prostori,
- 3 % podjetij (ali 1 % prihodka) je omejevala slaba ponudba.

- 14% of enterprises (or 7% of turnover) were limited by shortage of sales surface,
- 12% of enterprises (or 8% of turnover) were limited by access to bank credits,
- 12% of enterprises (or 4% of turnover) were limited by other factors such as lack of financial discipline, high rents, bad location, etc.,
- 11% of enterprises (or 18% of turnover) experienced no obstacles,
- 7% of enterprises (or 4% of turnover) were limited by small storage capacity,
- 3% of enterprises (or 1% of turnover) were limited by supply shortage.

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