STATISTIČNI URAD REPUBLIKE SLOVENIJE
STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA

STATISTIČNE INFORMACIJE
RAPID REPORTS

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30. SEPTEMBER 2004
30 SEPTEMBER 2004

št./No **295**

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

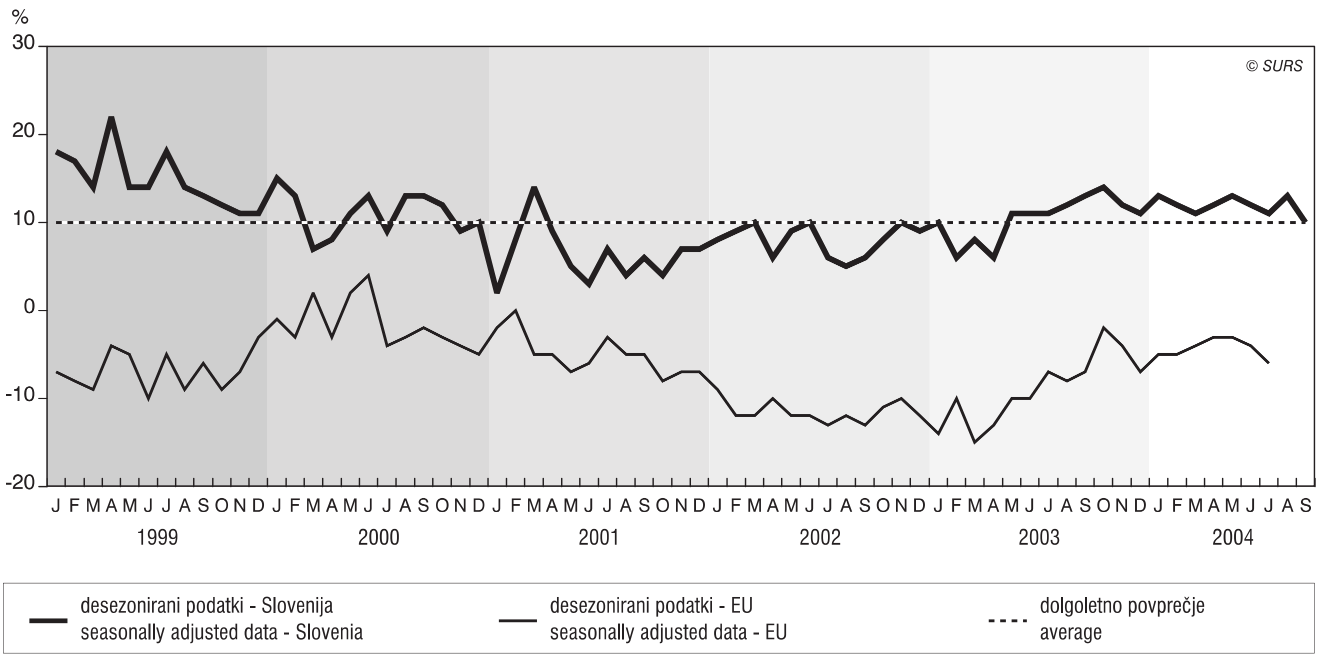
št./No **35**

POSLOVNE TENDENCE V TRGOVINI NA DROBNO, SLOVENIJA, JANUAR 1999 - SEPTEMBER 2004
BUSINESS TENDENCY IN RETAIL TRADE, SLOVENIA, JANUARY 1999 - SEPTEMBER 2004

- V septembru se je desezonirana vrednost kazalca zaupanja v trgovini na drobno v primerjavi s preteklim mesecem znižala za 3 odstotne točke. Tudi v primerjavi z lanskim septembrom je bila vrednost kazalca nižja za 3 odstotne točke, glede na lansko povprečje je vrednost kazalca ostala nespremenjena.
- Na razvoj kazalca zaupanja je vplivalo predvsem poslabšanje pričakovanega poslovnega položaja, medtem ko sta sedanji poslovni položaj in obseg zalog ostala nespremenjena.
- Kazalci stanj so se večinoma izboljšali; izjema so bili kazalci konkurenčnost, raven prodaje in gibanje prodaje. Za večino kazalcev pričakovanj je bilo zabeleženo poslabšanje, izjema sta bila kazalca pričakovane skupne nabave in pričakovane prodajne cene.

- In September the seasonally adjusted retail trade confidence indicator showed a decline by 3 percentage points compared to August 2004. Compared to September 2003 the indicator also fell by 3 percentage points while compared to last year's average its value remained unchanged.
- This development of the indicator was dominated by a deterioration of the expected business situation, while the present business situation and the volume of stocks remained unchanged.
- Indicators of the present business situation mostly improved, except the indicators of competition, level of sales and evolution of sales. Decreases were recorded for most indicators of the expected business situation, except for the indicators of expected orders and selling prices expectations.

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



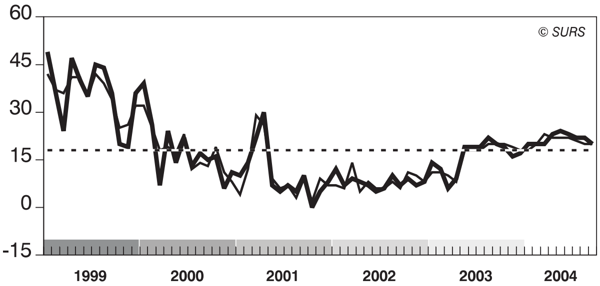
[1] Kazalec zaupanja je povprečje ravnotežij na vprašanja o sedanjem in pričakovanem poslovnem položaju ter sedanjem obsegu zalog (obrnjen predznak).
The confidence indicator is an average of responses (balances) to questions on present and expected business situation and present stock (the latter with inverted sign).
[2] Vir podatkov je Evropska komisija. Podatki o EU za zadnja dva meseca nam niso na voljo.
Source for EU data is European Commission. Data for EU for the last two months are not available.

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

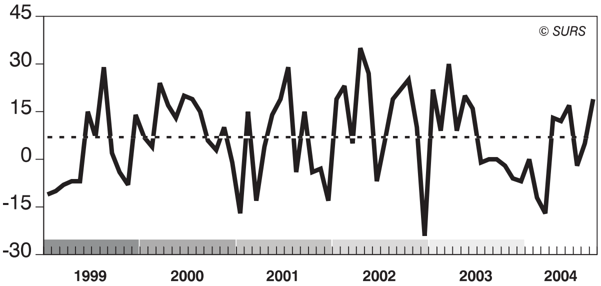
2. EVOLUTION OF ECONOMIC INDICATORS IN RETAIL TRADE IN SLOVENIA, JANUARY 1999 - SEPTEMBER 2004

Ocena stanj / Appreciation of situation

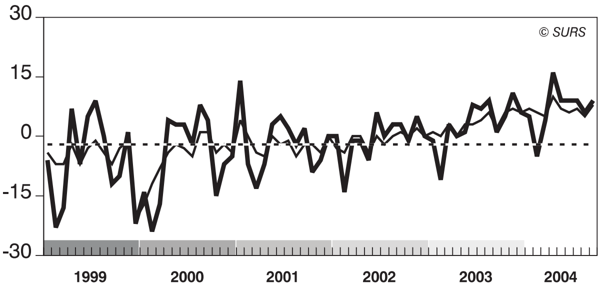
Poslovni položaj / Business situation



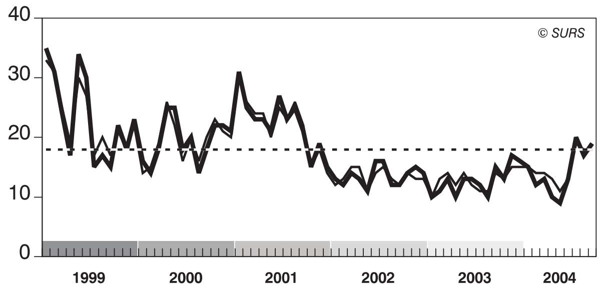
Prodajne cene[1] / Selling prices[1]



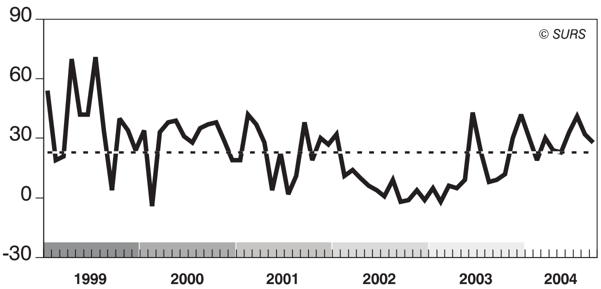
Finančni položaj / Financial situation



Obseg zalog / Present stocks

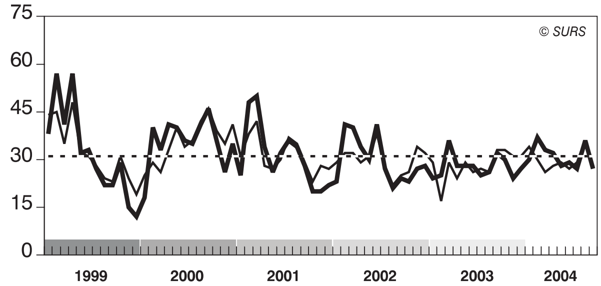


Raven prodaje[1] / Level of sales[1]

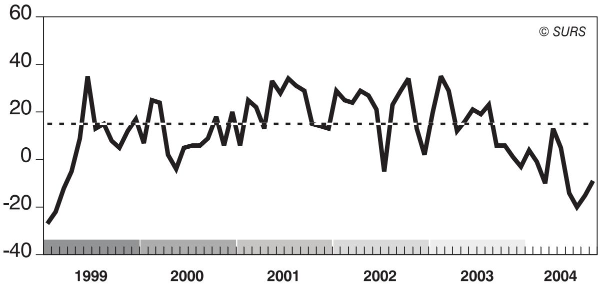


Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months

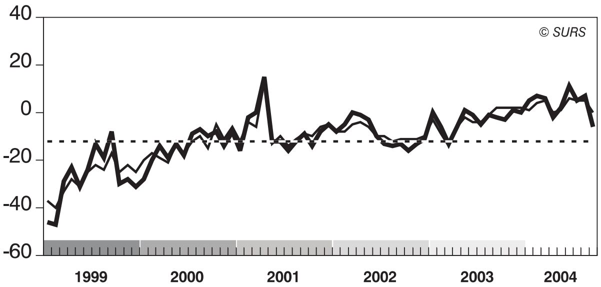
Pričakovani poslovni položaj / Expected business situation



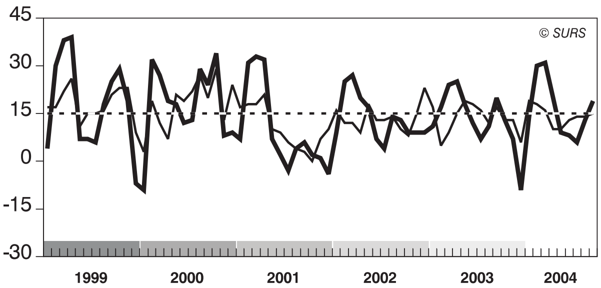
Pričakovane prodajne cene[1] / Selling prices expectations[1]



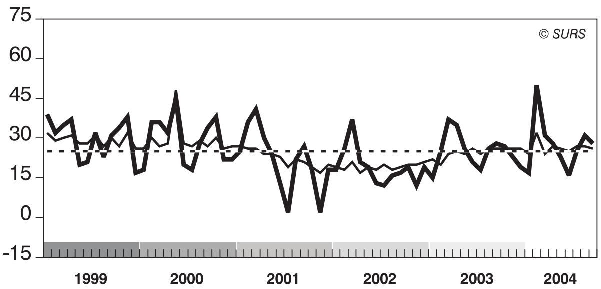
Pričakovano zaposlovanje / Expected employment



Pričakovana skupna nabava / Expected orders placed



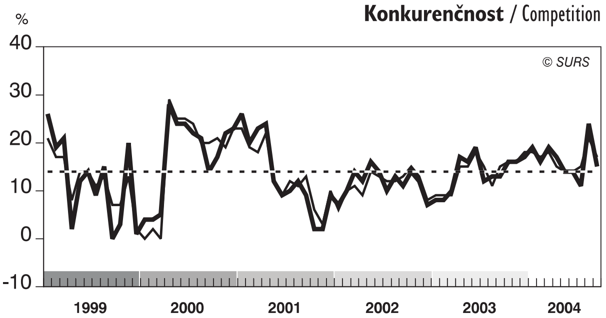
Pričakovano povpraševanje / Expected demand

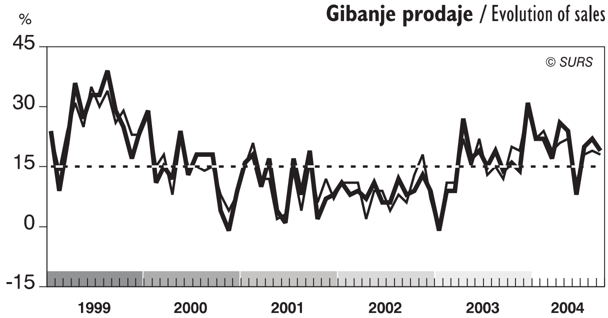


originalni podatki / raw data — desezonirani podatki / seasonally adjusted data - - - - dolgoletno povprečje / average

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

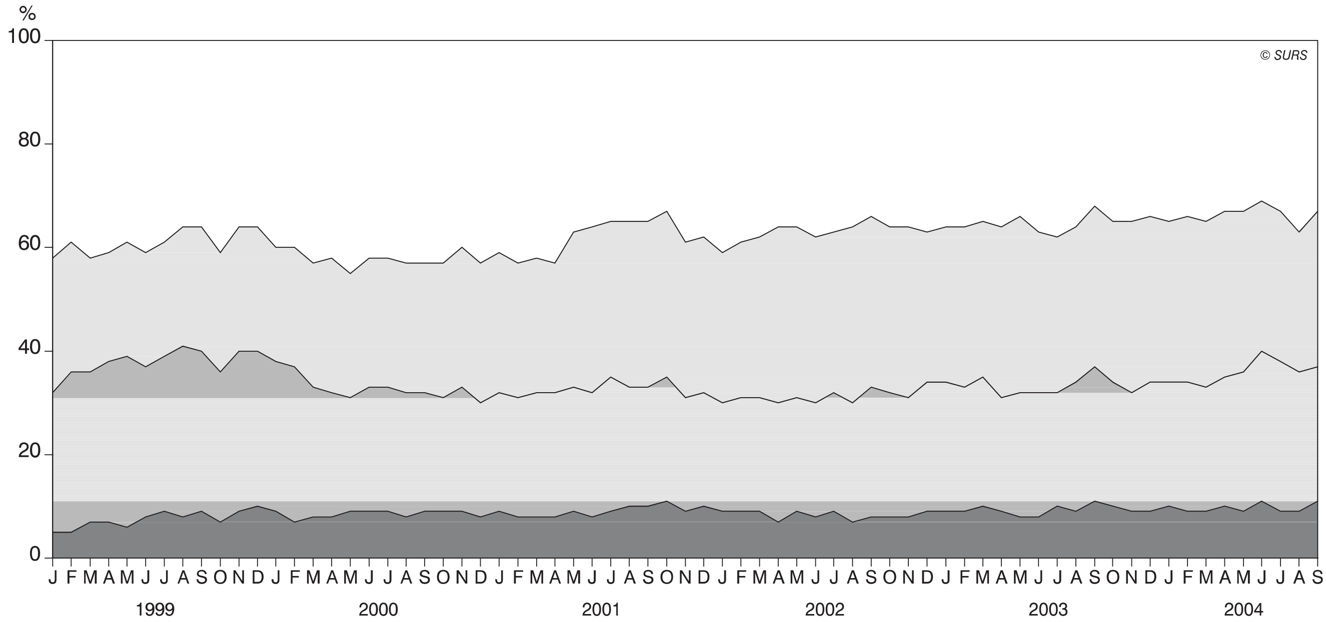
Ocena konkurenčnosti in gibanje prodaje
Appreciation of competition and evolution of sales





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

Omejitveni dejavniki v trgovini na drobno
Obstacles in retail trade



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

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

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

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

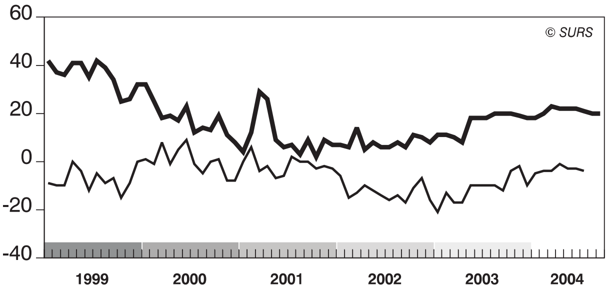
hude omejitve / severe obstacles — težave s ponudbo / supply difficulties — težave s povpraševanjem / demand difficulties — ni omejitev / no limits

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

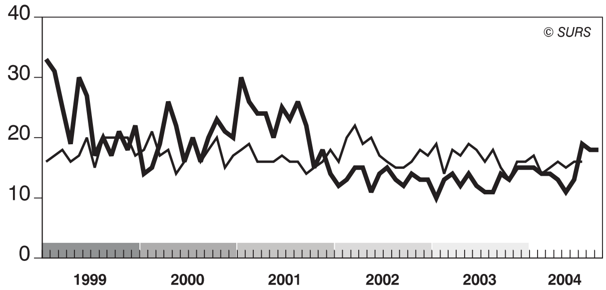
3. EVOLUTION OF ECONOMIC INDICATORS IN RETAIL TRADE IN SLOVENIA AND EU[1], JANUARY 1999 - SEPTEMBER 2004

Ocena stanj / Appreciation of situation

Poslovni položaj / Business situation

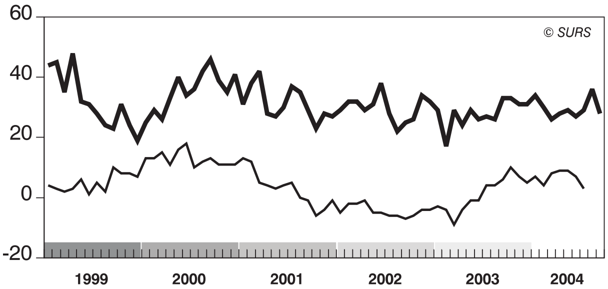


Obseg zalog / Present stocks

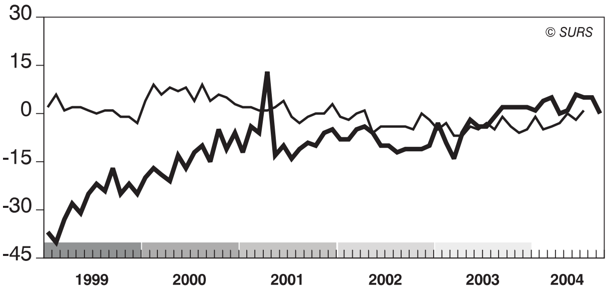


Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months

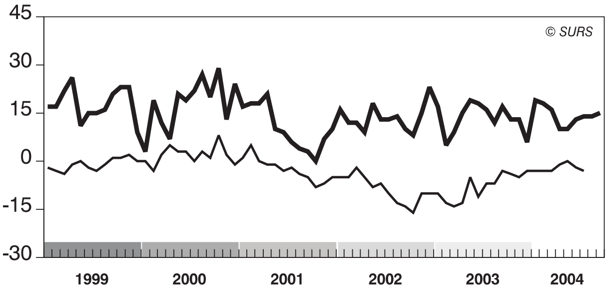
Pričakovani poslovni položaj / Expected business situation



Pričakovano zaposlovanje / Expected employement



Pričakovana skupna nabava / Expected orders placed



Slovenija / Slovenia — EU / EU

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

METODOLOŠKA POJASNILA

NAMEN STATISTIČNEGA RAZISKOVANJA

Namen kvalitativne Ankete o poslovnih tendencah v trgovini na drobno (vprašalnik PA-TRG) je mesečno pridobivanje informacij o trenutnih stanjih glavnih ekonomskih kazalcev ter ocenitev njihovega gibanja v naslednjih mesecih. Rezultati anket so osnova za izračun kazalca zaupanja v trgovini na drobno in kazalca gospodarske klime, ki vključuje poleg kazalca zaupanja v trgovini na drobno tudi kazalec zaupanja pri potrošnikih in kazalec zaupanja v predelovalnih dejavnostih.

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

ENOTA OPAZOVANJA

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

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

Vzorec podjetij je oblikovan na podlagi dveh meril:

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

VIRI

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

ZAJETJE

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

NAČIN ZBIRANJA PODATKOV

Anketo izvajamo mesečno po pošti.

UTEŽEVANJE ODGOVOROV

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

NEODGOVORI

Neodgovore vsak mesec obdelamo skladno s poenoteno metodologijo.

DEFINICIJE IN POJASNILA

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

METHODOLOGICAL EXPLANATIONS

PURPOSE OF THE STATISTICAL SURVEY

The purpose of the qualitative Survey on Business Tendency (questionnaire PA-TRG) is to get monthly information about current situations of major economic indicators and to evaluate their movement in the following months. The results of the survey are the basis for evaluation of the confidence indicator in retail trade and latter on also for the sentiment indicator, which also includes the consumer confidence indicator and the confidence indicator in manufacturing.

We have been carrying out the Panel Survey on Business Tendency in Retail Trade in Slovenia since January 1999 with the harmonised questionnaire, methodology and periodicity, which have been used in EU Member States for several decades. Therefore, all data are directly comparable.

OBSERVATION UNITS

We are monitoring units that are registered in retail trade or sale of motor vehicles in the following divisions:

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

They were selected into the panel by two criteria:

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

SOURCES

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

COVERAGE

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

METHOD OF DATA COLLECTING

The survey is carried out monthly by mail.

WEIGHTS FOR RESPONSES

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

NON-RESPONSES

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

DEFINITIONS AND EXPLANATIONS

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

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

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

OBJAVLJANJE REZULTATOV

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

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

VPRAŠANJA :

⇨ Ocene stanj:

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

⇨ Pričakovanja v naslednjih mesecih:

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

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

Data in the charts are seasonally adjusted. Values are adjusted for the seasonal component and include the trend-cycle component and the irregular component. Data for the EU are seasonally adjusted by DAINTIES method and for Slovenia by TRAMO/SEATS method, which is based on ARIMA models. The designing of the models is based on the time period from January 1999 to January 2004. Selling prices, selling prices expectation and the level of sales have no seasonal component.

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

PUBLISHING

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

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

QUESTIONS:

⇨ Appreciation of situation:

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

⇨ Expectation in the next months:

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

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

KOMENTAR

V septembru se je desezonirana vrednost kazalca zaupanja v trgovini na drobno v primerjavi s preteklim mesecem znižala za 3 odstotne točke. Tudi v primerjavi z lanskim septembrom je bila vrednost kazalca nižja za 3 odstotne točke, glede na lansko povprečje pa je njegova vrednost ostala nespremenjena.

Na razvoj kazalca zaupanja je vplivalo predvsem poslabšanje pričakovanega poslovnega položaja, medtem ko sta sedanji poslovni položaj in obseg zalog ostala nespremenjena.

Kazalci stanj so se večinoma izboljšali; izjema so bili kazalci konkurenčnost, raven prodaje in gibanje prodaje Za večino kazalcev pričakovanj je bilo zabeleženo poslabšanje, izjema sta bila kazalca pričakovane skupne nabave in pričakovane prodajne cene.

PRIČAKOVANJA

PRIČAKOVANI POSLOVNI POLOŽAJ

Desezonirana vrednost kazalca pričakovanega poslovnega položaja je v primerjavi s preteklim mesecem padla za 8 odstotnih točk. Glede na lanski september je bila vrednost kazalca za 5 odstotnih točk nižja, medtem ko je v primerjavi z lanskim povprečjem vrednost ostala nespremenjena.

PRIČAKOVANE PRODAJNE CENE

V primerjavi s preteklim mesecem je bila desezonirana vrednost kazalca pričakovanih prodajnih cen višja za 6 odstotnih točk. Glede na isti mesec lani in lansko povprečje je bilo zabeleženo veliko zmanjšanje, in sicer 15 oziroma 24 odstotnih točk.

PRIČAKOVANO ZAPOSLOVANJE

Desezonirana vrednost kazalca pričakovanega zaposlovanja se je zmanjšala za 5 odstotnih točk glede na pretekli mesec in za 4 odstotne točke glede na isti mesec lanskega leta. Medtem ko je bila vrednost kazalca za 3 odstotne točke nad lanskim povprečjem.

PRIČAKOVANA SKUPNA NABAVA

Desezonirana vrednost kazalca pričakovane skupne nabave je pokazala rahlo mesečno zvišanje, saj je zrasla za 1 odstotno točko. V primerjavi z istim mesecem lani je vrednost tega kazalca rahlo padla, in sicer za 1 odstotno točko, glede na lansko povprečje pa je bila vrednost kazalca višja za 2 odstotni točki.

PRIČAKOVANO POVPRAŠEVANJE

Desezonirana vrednost kazalca pričakovanega povpraševanja je v primerjavi s preteklim mesecem malo padla, in sicer za 1 odstotno točko. Glede na isti mesec lanskega leta je vrednost kazalca ostala nespremenjena, medtem ko je bila glede na lansko povprečje za 2 odstotni točki višja.

STANJA

POSLOVNI POLOŽAJ

V septembru je desezonirana vrednost kazalca poslovnega položaja

COMMENT

In September the seasonally adjusted retail trade confidence indicator showed a decline by 3 percentage points compared to August 2004. Compared to September 2003 the indicator also fell by 3 percentage points while compared to last year's average its value remained unchanged.

This development of the indicator was dominated by a deterioration of the expected business situation, while the present business situation and the volume of stocks remained unchanged.

Indicators of the present business situation mostly improved, except the indicators of competition, level of sales and evolution of sales. Decreases were recorded for most indicators of the expected business situation, except for the indicators of expected orders and selling prices expectations.

EXPECTATIONS

EXPECTED BUSINESS SITUATION

The seasonally adjusted value of the expected business situation indicator fell by 8 percentage points compared to the previous month. Compared to September 2003 it edged down by 5 percentage points while compared to last year’s average it remained unchanged.

SELLING PRICES EXPECTATIONS

The seasonally adjusted value of the selling prices expectations indicator rose by 6 percentage points compared to the previous month. Compared to September 2003 and to last year’s average significant worsening was recorded, i.e. by 15 and 24 percentage points, respectively.

EXPECTED EMPLOYMENT

The seasonally adjusted value of the expected employment indicator showed a decline by 5 percentage points in comparison to the previous month and by 4 percentage points compared to September 2003. The value was 3 percentage points above its last year’s average.

EXPECTED ORDERS

The seasonally adjusted value of the expected orders indicator showed a little month-to-month progress as it rose by 1 percentage point. Compared to September 2003 it slightly fell by 1 percentage point and it was 2 percentage points higher than last year’s average.

EXPECTED DEMAND

The seasonally adjusted value of the expected demand indicator slightly fell by 1 percentage point in comparison to the previous month. Compared to September 2003 it remained the same and compared to last year’s average it was 2 percentage points higher.

SITUATION

BUSINESS SITUATION

In September the seasonally adjusted value of the business situation ostala nespremenjena tako glede na pretekli mesec kot tudi v primerjavi z istim mesecem lanskega leta. Glede na lansko povprečje pa je bila vrednost kazalca višja za 4 odstotne točke.

indicator remained the same as in the previous month as well as in September 2003, while compared to last year's average it was 4 percentage points higher.

PRODAJNE CENE

Desezonirana vrednost kazalca prodajnih cen se je močno izboljšala v primerjavi s preteklim mesecem, in sicer za 14 odstotnih točk. Močno izboljšanje vrednosti kazalca je bilo zabeleženo tudi glede na isti mesec lanskega leta in glede na lansko povprečje, in sicer za 19 oziroma 11 odstotnih točk.

SELLING PRICES

The seasonally adjusted value of the selling prices indicator strongly improved by 14 percentage points compared to August. A strong improvement was also recorded compared to September 2003 and compared to last year's average, i.e. by 19 and 11 percentage points, respectively.

FINANČNI POLOŽAJ

Desezonirana vrednost kazalca finančnega položaja je v primerjavi s preteklim mesecem višja za 3 odstotne točke. V primerjavi z istim mesecem lanskega leta je vrednost kazalca višja za 8 odstotnih točk in 5 odstotnih točk višja od lanskega povprečja.

FINANCIAL SITUATION

The seasonally adjusted value of the financial situation indicator rose by 3 percentage points compared to the previous month. Compared to September 2003 its value increased by 8 percentage points and it was 5 percentage points higher than last year's average.

OBSEG ZALOG

V primerjavi z avgustom je desezonirana vrednost kazalca obsega zalog ostala nespremenjena. Izboljšanje vrednosti kazalca je bila zabeležena tako glede na isti mesec lanskega leta kot tudi glede na lansko povprečje, in sicer 4 oziroma 5 odstotnih točk.

PRESENT STOCKS

The seasonally adjusted value of the present stocks indicator was the same as in August. Improvement was recorded in comparison to September 2003 as well as to last year's average, i.e. by 4 and 5 percentage points, respectively.

RAVEN PRODAJE

Desezonirana vrednost kazalca ravni prodaje je padla za 4 odstotne točke v primerjavi s preteklim mesecem. Glede na isti mesec lanskega leta je bila njegova vrednost za 19 odstotnih točk višja in 12 odstotnih točk višja od lanskega povprečja.

LEVEL OF SALES

The seasonally adjusted value of the level of sales indicator fell by 4 percentage points compared to the previous month. Compared to September 2003 it rose by 19 percentage points and compared to last year's average it was 12 percentage points higher.

KONKURENČNOST

Desezonirana vrednost kazalca konkurenčnosti je v primerjavi s preteklim mesecem padla za 4 odstotne točke. Njegova vrednost se je rahlo zvišala tako glede na isti mesec lanskega leta kot tudi glede na lansko povprečje, in sicer za 2 oziroma 3 odstotne točke.

COMPETITION

The seasonally adjusted value of the competition indicator edged down by 4 percentage points compared to August. On the positive side, it showed slight progress compared to September 2003 (2 percentage points) and to last year's average (3 percentage points).

GIBANJE PRODAJE ZA TO OBDOBJE LETA

Desezonirana vrednost kazalca gibanja prodaje je padla v primerjavi s preteklim mesecem padla za 1 odstotno točko. Glede na isti mesec lanskega leta je vrednost višja za 5 odstotnih točk in 2 odstotni točki nad lanskim povprečjem.

EVOLUTION OF SALES FOR THIS PERIOD OF YEAR

The seasonally adjusted value of the evolution of sales slightly declined by 1 percentage point compared to the previous month. In comparison to September 2003 it rose by 5 percentage points and it was 2 percentage points above last year's average.

OMEJITVENI DEJAVNIKI V TRGOVINI NA DROBNO

V trgovini na drobno se je 33% podjetij (oz. 27% prihodka) srečevalo z dejavniki iz skupine "hude omejitve". V primerjavi s preteklim mesecem je bil delež teh podjetij za 4 odstotne točke nižji, glede na isti mesec lanskega leta pa je bil višji za 1 odstotno točko.

Podjetij, ki so se srečevala s skupino dejavnikov "težave s ponudbo", je bilo 30% (oz. 23% prihodka). Delež teh podjetij se je glede na pretekli mesec povišal, in sicer za 3 odstotne točke, glede na isti mesec lanskega leta pa je padel za 1 odstotno točko.

Podjetij, ki so se srečevala s skupino dejavnikov "težave s povpraševanjem", je bilo 26% (oz. 31% prihodka), kar je bilo za 1 odstotno točko manj kot v preteklem mesecu in enako kot v lanskem septembru.

OBSTACLES IN RETAIL TRADE

In retail trade 33% of enterprises (27% of turnover) were faced with “severe obstacles” in trading. Compared to the previous month the share of these enterprises was lower by 4 percentage points and compared to September 2003 it was higher by 1 percentage point.

The share of enterprises faced with “supply difficulties” was 30% (23% of turnover). Compared to the previous month this share rose by 3 percentage points and compared to September 2003 it fell by 1 percentage point.

The share of enterprises faced with “demand difficulties” was 26% (31% of turnover), which was 1 percentage point less than in the previous month and the same as in September 2003.

Podjetij, ki niso imela omejitev v poslovanju, je 11% (oz. 19% prihodka). Delež teh podjetij je bil glede na pretekli mesec višji za 2 odstotni točki in nespremenjen glede na lanski september.

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

- 44 % podjetij (ali 49 % prihodka) je omejevala konkurenca v sektorju,
- 39 % podjetij (ali 35 % prihodka) so omejevali visoki stroški dela,
- 30 % podjetij (ali 24 % prihodka) je omejevalo nezadostno povpraševanje,
- 26 % podjetij (ali 29 % prihodka) je omejevala visoka cena denarja,
- 14 % podjetij (ali 7 % prihodka) je omejevala premajhna prodajna površina,
- 12 % podjetij (ali 7 % prihodka) je omejevala dostopnost do bančnih kreditov,
- 11 % podjetij (ali 19 % prihodka) ni imelo omejitev v poslovanju,
- 10 % podjetij (ali 3 % prihodka) so omejevali drugi dejavniki, kot so finančna nedisciplina, visoke najemnine, slaba lokacija itd.,
- 8 % podjetij (ali 4 % prihodka) so omejevali premajhni skladiščni prostori,
- 3 % podjetij (ali 1 % prihodka) je omejevala slaba ponudba.

Only 11% of enterprises (19% of turnover) experienced no obstacles. The share of these enterprises rose by 2 percentage points compared to the previous month and remained the same compared to September 2003.

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

- 47% of enterprises (or 43% of turnover) were limited by competition in own sector,
- 39% of enterprises (or 35% of turnover) were limited by high cost of labour,
- 30% of enterprises (or 24% of turnover) were limited by insufficient demand,
- 26% of enterprises (or 29% of turnover) were limited by high cost of money,
- 14% of enterprises (or 7% of turnover) were limited by shortage of sales surface,
- 12% of enterprises (or 7% of turnover) were limited by access to bank credits,
- 11% of enterprises (or 19% of turnover) experienced no obstacles,
- 10% of enterprises (or 3% of turnover) were limited by other factors such as lack of financial discipline, high rents, bad location, etc.,
- 8% of enterprises (or 4% of turnover) were limited by small storage capacity,
- 3% of enterprises (or 1% of turnover) were limited by supply shortage.

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

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