STATISTIČNI URAD REPUBLIKE SLOVENIJE
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20 TRGOVINA IN DRUGE STORITVENE DEJAVNOSTI
DISTRIBUTIVE TRADE AND OTHER SERVICE ACTIVITIES

št./No 39

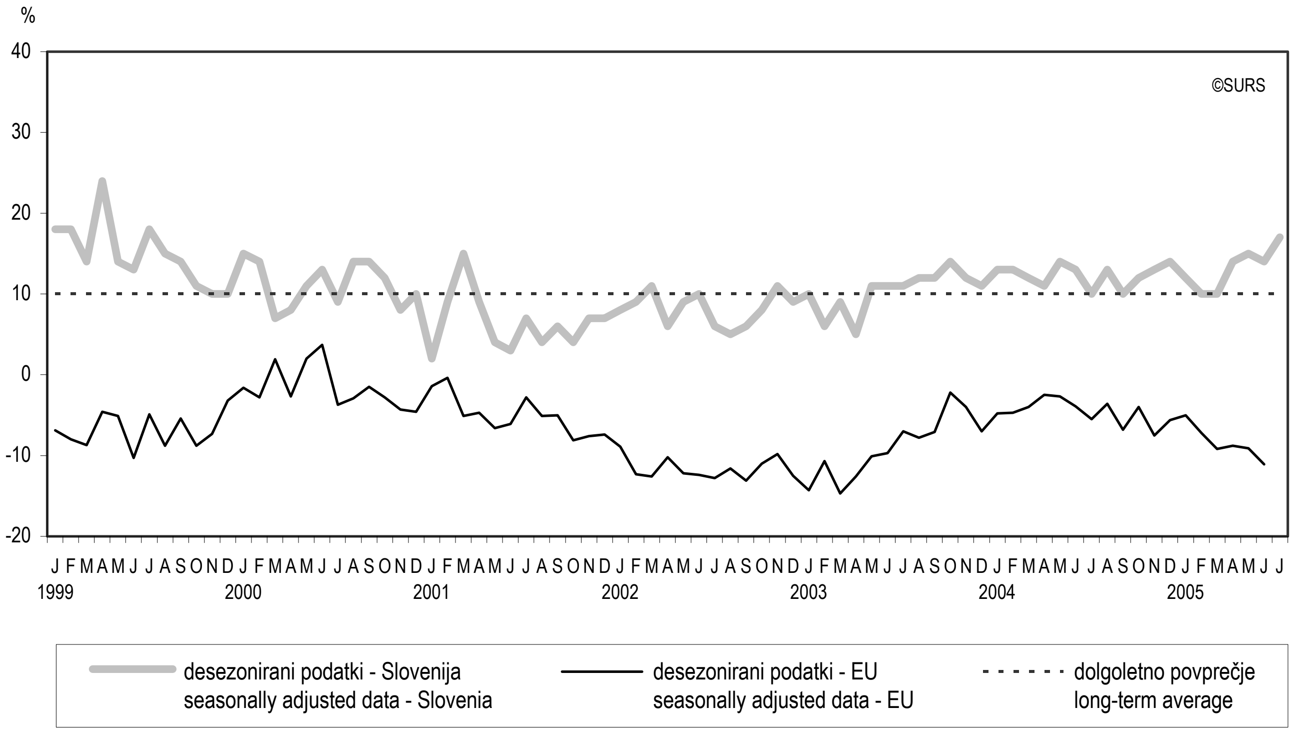
POSLOVNE TENDENCE V TRGOVINI NA DROBNO, SLOVENIJA, JULIJ 2005

BUSINESS TENDENCY IN RETAIL TRADE, SLOVENIA, JULY 2005

- V juliju 2005 se je desezonirana vrednost kazalca zaupanja v trgovini na drobno izboljšala v vseh treh primerjavah, in sicer je bila njegova vrednost v primerjavi s preteklim mesecem višja za 3 odstotne točke, v primerjavi z lanskim julijem za 7 odstotnih točk, v primerjavi z lanskim povprečjem pa za 5 odstotnih točk.
- Na gibanje vrednosti kazalca zaupanja so vplivale boljša ocena *sedanjega poslovnega položaja,* boljša ocena *pričakovanega poslovnega položaja* in tudi ocena o manjšem *obsegu zalog.*
- Vsi kazalci stanj so se povečali, kazalec obseg zalog pa se je zmanjšal. Tudi večina kazalcev pričakovanj se je izboljšala. Izjema sta bila kazalca pričakovano zaposlovanje in pričakovano povpraševanje, ki sta se poslabšala.

- In July 2005 the seasonally adjusted retail trade confidence indicator improved in all three comparisons. Compared to the previous month it went up by 3 percentage points, compared to July 2004 by 7 percentage points and compared to last year's average by 5 percentage points.
- This development of the indicator was due to improvement in the assessment of the *present* and *expected business situation* as well as the assessment of decreased *volume of stocks.*
- All situation indicators rose except the indicator of the volume of stocks fell. The expectation indicators mostly improved also. Exceptions were indicators of the expected employment and expected demand, which worsened.

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

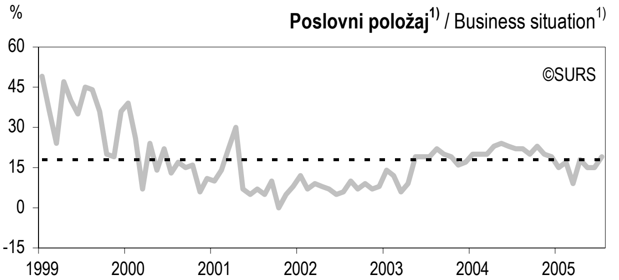


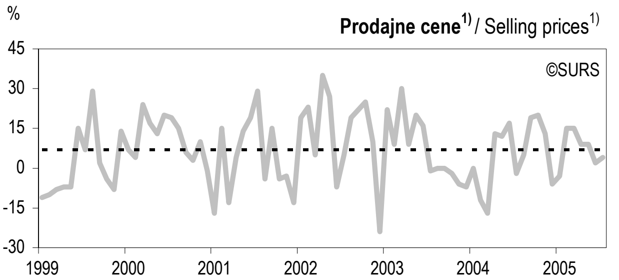
1) Kazalec zaupanja je povprečje odgovorov (ravnotežij) na vprašanja o sedanjem in pričakovanem poslovnem položaju ter sedanjem obsegu zalog (obrnjen predznak).
The confidence indicator is an average of responses (balances) to questions on present and expected business situation and present volume of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

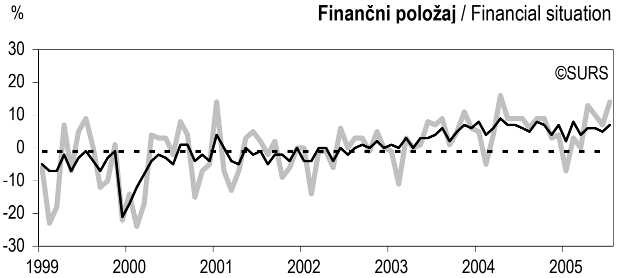
2) Vir podatkov je Evropska komisija (http://europa.eu.int/comm/economy_finance/indicators/businessandconsumersurveys_en.htm). Podatki o EU za zadnji mesec niso na voljo.
Source for EU data is European Commission (http://europa.eu.int/comm/economy_finance/indicators/businessandconsumersurveys_en.htm).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

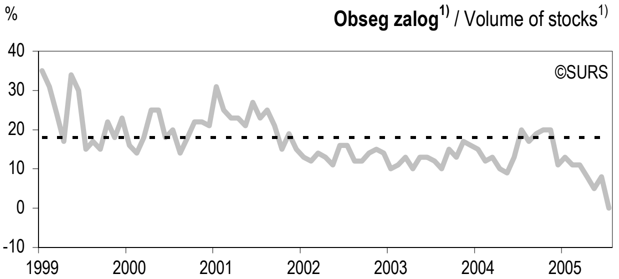
2. GIBANJE EKONOMSKIH KAZALCEV V TRGOVINI NA DROBNO V SLOVENIJI, JANUAR 1999 - JULIJ 2005
EVOLUTION OF ECONOMIC INDICATORS IN RETAIL TRADE IN SLOVENIA, JANUARY 1999 - JULY 2005

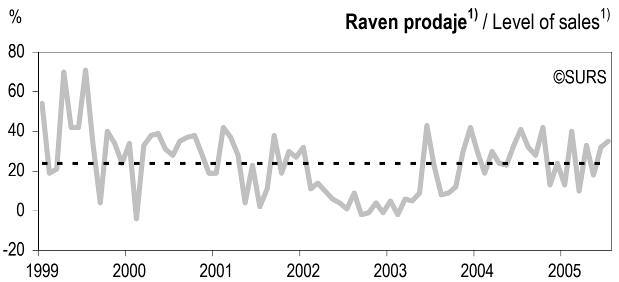
Ocena stanj
Appreciation of situation



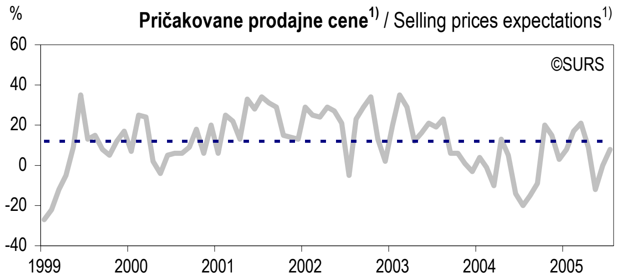


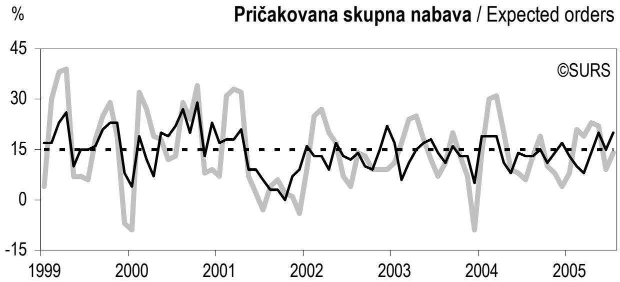


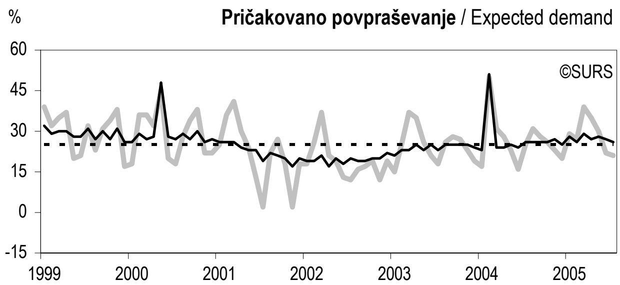




Pričakovanja v naslednjih 3 mesecih
Expectations in the next 3 months



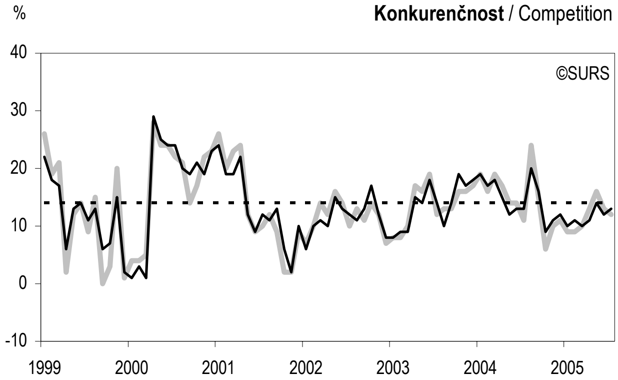


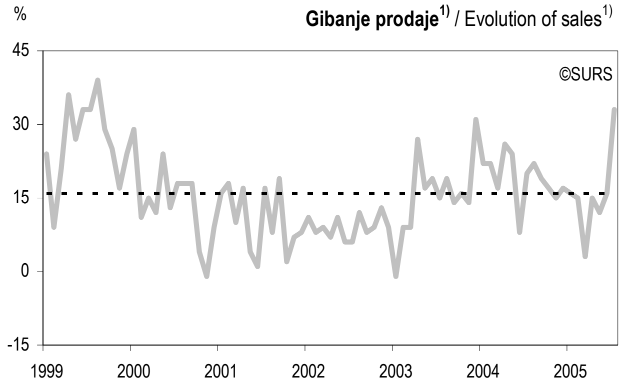


originalni podatki raw data	desezonirani podatki seasonally adjusted data	dolgoletno povprečje long-term average

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

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

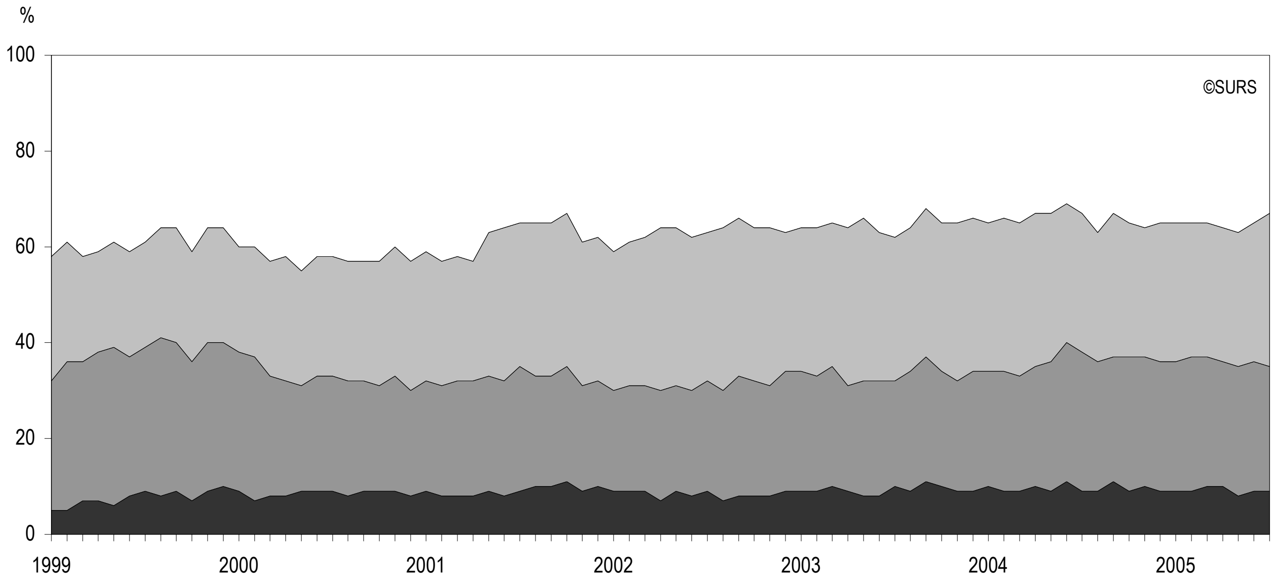




originalni podatki / raw data — desezonirani podatki / seasonally adjusted data — dolgoletno povprečje / long-term average

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

Omejitveni dejavniki v trgovini na drobno / Obstacles in retail trade



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

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

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

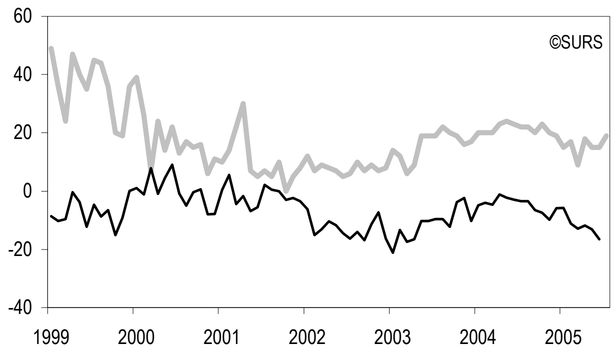
The chart on retail trade obstacles shows the share of enterprises faced with the following groups of problems:

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

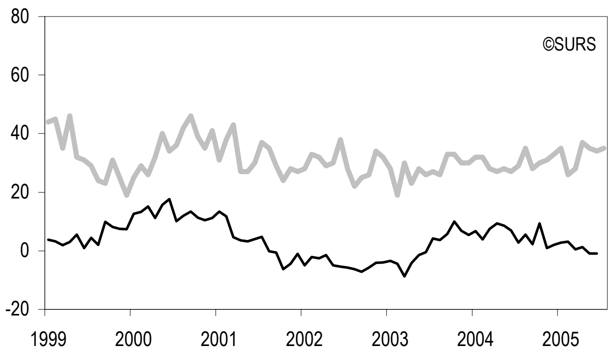
3. GIBANJE EKONOMSKIH KAZALCEV V TRGOVINI NA DROBNO V SLOVENIJI IN EU[1)], JANUAR 1999 - JULIJ 2005
EVOLUTION OF ECONOMIC INDICATORS IN RETAIL TRADE IN SLOVENIA AND EU[1)], JANUARY 1999 - JULY 2005

Ocena stanj Appreciation of situation	**Pričakovanja v naslednjih 3 mesecih** Expectations in the next 3 months

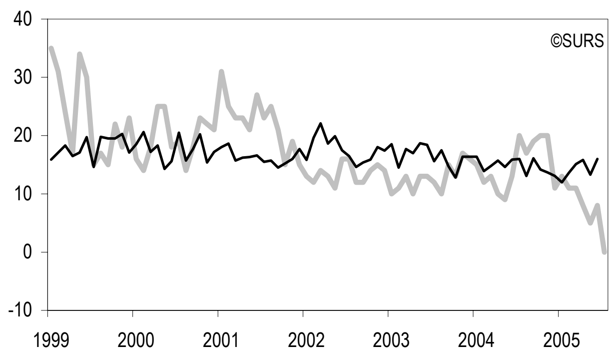
Poslovni položaj / Business situation



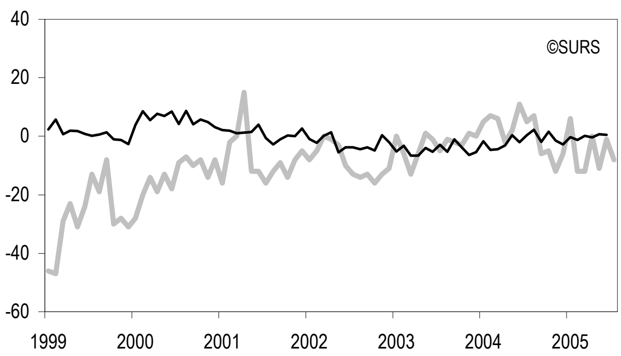
Pričakovani poslovni položaj / Expected business situation



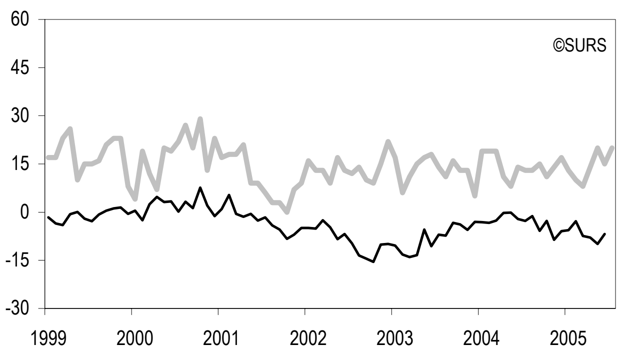
Obseg zalog / Volume of stocks



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 juliju 2005 se je desezonirana vrednost kazalca zaupanja v trgovini na drobno izboljšala v vseh treh primerjavah, in sicer je bila njegova vrednost v primerjavi s preteklim mesecem višja za 3 odstotne točke, v primerjavi z lanskim julijem za 7 odstotnih točk, v primerjavi z lanskim povprečjem pa za 5 odstotnih točk.

COMMENT

In July 2005 the seasonally adjusted retail trade confidence indicator improved in all three comparisons. Compared to the previous month it went up by 3 percentage points, compared to July 2004 by 7 percentage points and compared to last year's average by 5 percentage points.

OCENA STANJ

POSLOVNI POLOŽAJ

V juliju 2005 je bila vrednost kazalca poslovni položaj za 4 odstotne točke višja kot v preteklem mesecu. V primerjavi z istim mesecem lanskega leta in v primerjavi z lanskim povprečjem se je njegova vrednost znižala, in to za 3 odstotne točke oziroma 2 odstotni točki.

PRODAJNE CENE

Vrednost kazalca prodajne cene je v mesečni primerjavi zrasla, in sicer za 2 odstotni točki v primerjavi z junijem 2005. Hkrati je bila za 6 odstotnih točk višja kot v lanskem juliju in za 1 odstotno točko nižja od lanskega povprečja.

FINANČNI POLOŽAJ

Desezonirana vrednost kazalca finančni položaj se je v vseh treh primerjavah malo izboljšala. V primerjavi s preteklim mesecem se je le-ta povečala za 2 odstotni točki, v primerjavi z istim mesecem lani za 5 odstotnih točk in v primerjavi z lanskim povprečjem za 1 odstotno točko.

OBSEG ZALOG

Kazalec obseg zalog je opazno padel v vseh treh primerjavah. V primerjavi z junijem 2005 je padel za 8 odstotnih točk, v primerjavi z julijem 2004 za 20 odstotnih točk in v primerjavi z lanskim povprečjem za 15 odstotnih točk.

RAVEN PRODAJE

Vrednost kazalca raven prodaje se je v primerjavi z junijem 2005 povečala za 3 odstotne točke. V primerjavi z julijem 2004 je njegova vrednost padla za 6 odstotnih točk, hkrati pa je bila za 7 odstotnih točk višja od lanskega povprečja.

PRIČAKOVANJA

PRIČAKOVANI POSLOVNI POLOŽAJ

V juliju 2005 je desezonirana vrednost kazalca pričakovani poslovni položaj v primerjavi z junijem 2005 nekoliko zrasla (za 1 odstotno točko). V primerjavi z julijem 2004 se je vrednost tega kazalca dvignila za 6 odstotnih točk, v primerjavi z lanskim povprečjem pa za 5 odstotnih točk.

PRIČAKOVANE PRODAJNE CENE

Vrednost kazalca pričakovane prodajne cene se je opazno izboljšala. V primerjavi s preteklim mesecem se je vrednost dvignila za 8 odstotnih točk, v primerjavi z julijem 2004 se je povzpela za 28 odstotnih točk in bila 9 odstotnih točk nad lanskim povprečjem.

APPRECIATION OF SITUATION

BUSINESS SITUATION

In July 2005 the business situation indicator rose by 4 percentage points compared to the previous month. Compared to July 2004 and to last year's average it fell by 3 and by 2 percentage points, respectively.

SELLING PRICES

In a month-to-month comparison the indicator of the selling prices went up by 2 percentage points compared to June 2005. Its rise by 6 percentage points was also recorded in comparison with July 2004 and it was 1 percentage point below last year's average.

FINANCIAL SITUATION

The seasonally adjusted indicator of the financial situation slightly improved in all three comparisons. Compared to the previous month it was up by 2 percentage points, compared to July 2004 by 5 percentage points and compared to last year's average by 1 percentage point.

VOLUME OF STOCKS

The volume of stocks indicator plummeted in all three comparisons. Compared to June 2005 it plummeted by 8 percentage points, compared to July 2004 by 20 percentage points and compared to last year's average by 15 percentage points.

LEVEL OF SALES

The indicator of the level of sales rose by 3 percentage points in comparison with June 2005. Compared to July 2004 it fell by 6 percentage points and it rose by 7 percentage points compared to last year's average.

EXPECTATIONS

EXPECTED BUSINESS SITUATION

In July 2005 the seasonally adjusted indicator of the expected business situation showed a small increase of 1 percentage point compared to June 2005. In comparison with July 2004 it was up by 6 percentage points and compared to last year's average by 5 percentage points.

SELLING PRICES EXPECTATIONS

The selling prices expectations indicator markedly improved. Compared to the previous month it climbed up by 8 percentage points. In comparison with July 2004 it rocketed by 28 percentage points and it was 9 percentage points above last year's average.

PRIČAKOVANO ZAPOSLOVANJE

V juliju 2005 je vrednost kazalca pričakovano zaposlovanje v vseh primerjavah izrazito padla. Glede na junij 2005 se je njegova vrednost znižala za 7 odstotnih točk, glede na julij 2004 je bila nižja za 13 odstotnih točk, za 9 odstotnih točk pa je bila nižja od lanskega povprečja.

PRIČAKOVANA SKUPNA NABAVA

V juliju 2005 je bila desezonirana vrednost kazalca pričakovana skupna nabava za 5 odstotnih točk višja kot v juniju 2005, za 8 odstotnih točk višja kot v juliju 2004 in za 6 odstotnih točk višja od lanskega povprečja.

PRIČAKOVANO POVPRAŠEVANJE

V juliju 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 nižja za 4 odstotne točke oziroma za 1 odstotno točko v primerjavi z lanskim povprečjem.

KONKURENČNOST

Desezonirana vrednost kazalca konkurenčnost je bila za 1 odstotno točko višja od vrednosti v preteklem mesecu. Tudi v primerjavi z istim mesecem lani je njegova vrednost zrasla za 1 odstotno točko in bila hkrati za 2 odstotni točki pod lanskim povprečjem.

GIBANJE PRODAJE ZA TO OBDOBJE LETA

V juliju 2005 je bil zabeležen izrazit dvig vrednosti kazalca gibanje prodaje za to obdobje leta: v primerjavi z junijem 2005 je bila vrednost tega kazalca višja za 17 odstotnih točk, v primerjavi z istim mesecem lanskega leta za 13 odstotnih točk in v primerjavi z lanskim povprečjem za 14 odstotnih točk.

OMEJITVENI DEJAVNIKI V TRGOVINI NA DROBNO

V trgovini na drobno se je 33 % podjetij (oz. 25 % prihodka) srečevalo z dejavniki iz skupine *"hude omejitve"*. Delež teh podjetij se je v primerjavi s preteklim mesecem zmanjšal za 2 odstotni točki, medtem ko je v primerjavi z istim mesecem lanskega leta ostal nespremenjen.

Podjetij, ki so se srečevala s skupino dejavnikov *"težave s ponudbo"*, je bilo 32 % (oz. 24 % prihodka), to je za 3 odstotne točke več kot v preteklem mesecu in za prav toliko več kot v juliju 2004.

Podjetij, ki so se srečevala s skupino dejavnikov *"težave s povpraševanjem"*, je bilo 26 % (oz. 32 % prihodka), kar je bilo za 1 odstotno točko manj kot v juniju 2005 in za 3 odstotne točke manj kot v juliju 2004.

Podjetij, ki pri svojem poslovanju *niso imela omejitev*, je bilo 9 % (oz. 19 % prihodka) oziroma prav toliko kot v preteklem mesecu in kot v juliju 2004.

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

- 47 % podjetij (ali 49 % prihodka) je omejevala konkurenca v sektorju,
- 38 % podjetij (ali 35 % prihodka) so omejevali visoki stroški dela,
- 30 % podjetij (ali 30 % prihodka) je omejevalo nezadostno povpraševanje,

EXPECTED EMPLOYMENT

In July 2005 the indicator of the expected employment decreased noticeably. In comparison with June 2005 it dropped by 7 percentage points, in comparison with July 2004 by 13 percentage points and in comparison with last year’s average by 9 percentage points.

EXPECTED ORDERS

In July 2005 the seasonally adjusted indicator of the expected orders climbed up by 5 percentage points in comparison with June 2005, compared to July 2004 by 8 percentage points and it was 6 percentage points above last year’s average.

EXPECTED DEMAND

In July 2005 the seasonally adjusted indicator of the expected demand went down by 1 percentage point compared to the previous month. Compared to July 2004 it was down by 4 percentage points and compared to last year’s average by 1 percentage point.

COMPETITION

The seasonally adjusted indicator of the competition slightly rose, i.e. by 1 percentage point when compared to the previous month. Its value also grew by 1 percentage point in comparison with July 2004 but it went down by 2 percentage points in comparison with last year’s average.

EVOLUTION OF SALES FOR THIS PERIOD OF YEAR

In July 2005 the value of the evolution of sales indicator showed an enormous overall rise. Compared to June 2005 it rocketed by 17 percentage points, compared to July 2004 by 13 percentage points and compared to last year’s average by 14 percentage points.

OBSTACLES IN RETAIL TRADE

In retail trade 33% 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 remained unchanged compared to the same month last year.

The share of enterprises faced with *“supply difficulties”* was 32% (24% of turnover). This share rose by 3 percentage points compared to the previous month as well as compared to July 2004.

The share of enterprises faced with *“demand difficulties”* was 26% (32% of turnover), which was 1 percentage point less than in June 2005 and 3 percentage points less than in July 2004.

Only 9% of enterprises (19% of turnover) experienced *no obstacles.* The share of these enterprises stayed the same compared to the previous month and compared to July 2004.

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

- 47% of enterprises (or 49% of turnover) were limited by competition in their own sector,
- 38% of enterprises (or 35% of turnover) were limited by high cost of labour,
- 30% of enterprises (or 30% of turnover) were limited by insufficient demand,

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%.

- 22 % podjetij (ali 22 % prihodka) je omejevala visoka cena denarja,
- 13 % podjetij (ali 6 % prihodka) je omejevala premajhna prodajna površina,
- 13 % podjetij (ali 4 % prihodka) so omejevali drugi dejavniki, kot so finančna nedisciplina, visoke najemnine, slaba lokacija itd.,
- 11 % podjetij (ali 17 % prihodka) je omejevala dostopnost do bančnih posojil,
- 10 % podjetij (ali 19 % prihodka) ni imelo omejitev v poslovanju,
- 8 % podjetij (ali 5 % prihodka) so omejevali premajhni skladiščni prostori,
- 3 % podjetij (ali 1 % prihodka) je omejevala slaba ponudba.

- 22% of enterprises (or 22% of turnover) were limited by the high cost of money,
- 13% of enterprises (or 6% of turnover) were limited by shortage of sales surface,
- 13% 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 17% of turnover) were limited in their access to bank credits,
- 10% of enterprises (or 19% of turnover) experienced no obstacles,
- 8% of enterprises (or 5% of turnover) were limited by small storage capacity,
- 3% of enterprises (or 1% of turnover) were limited by supply shortage.

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