



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

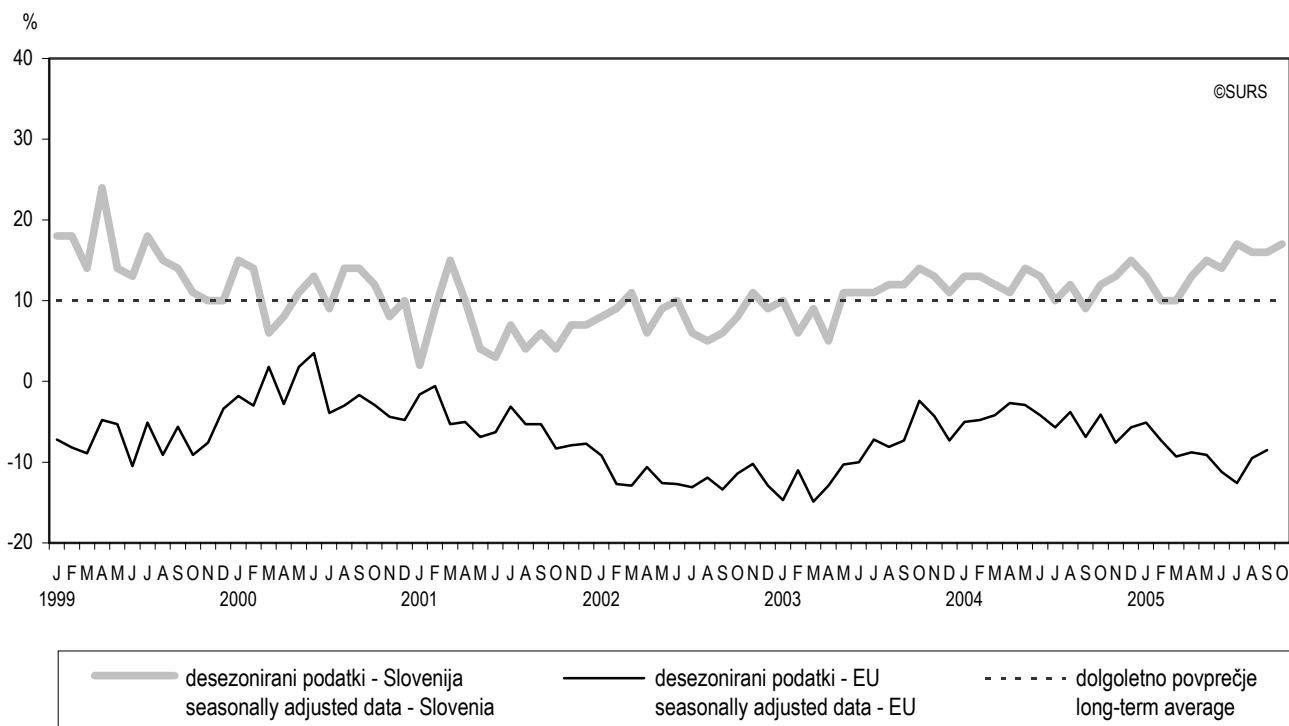
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POSLOVNE TENDENCE V TRGOVINI NA DROBNO, SLOVENIJA, OKTOBER 2005

BUSINESS TENDENCY IN RETAIL TRADE, SLOVENIA, OCTOBER 2005

- ▶ Desezonirana vrednost kazalnika zaupanja v trgovini na drobno je bila za 1 odstotno točko višja od preteklega meseca. V primerjavi z lanskim oktobrom in tudi z lanskim povprečjem pa je vrednost zrasla za 5 odstotnih točk.
- ▶ Na gibanje vrednosti kazalnika zaupanja sta vplivali ocena pričakovanega poslovnega položaja in tudi ocena o obsegu zalog.
- ▶ Kazalniki stanj so se v primerjavi s preteklim mesecem večinoma zvišali. Tudi večina kazalnikov pričakovanih se je izboljšala. Izjemi sta bila kazalnika pričakovanega zaposlovanja in pričakovanih prodajnih cen, ki sta se poslabšala.
- ▶ The seasonally adjusted retail trade confidence indicator increased by 1 percentage point in comparison with the previous month. Compared to October 2004 and last year's average it rose by 5 percentage points.
- ▶ This development of the indicator was influenced by the assessment of the expected business situation as well as the assessment of the volume of stocks.
- ▶ Observed indicators for appreciation of the situation mainly improved compared to the previous month. The expectations for the next three months are mostly favourable, except for the expected employment and selling prices expectations.

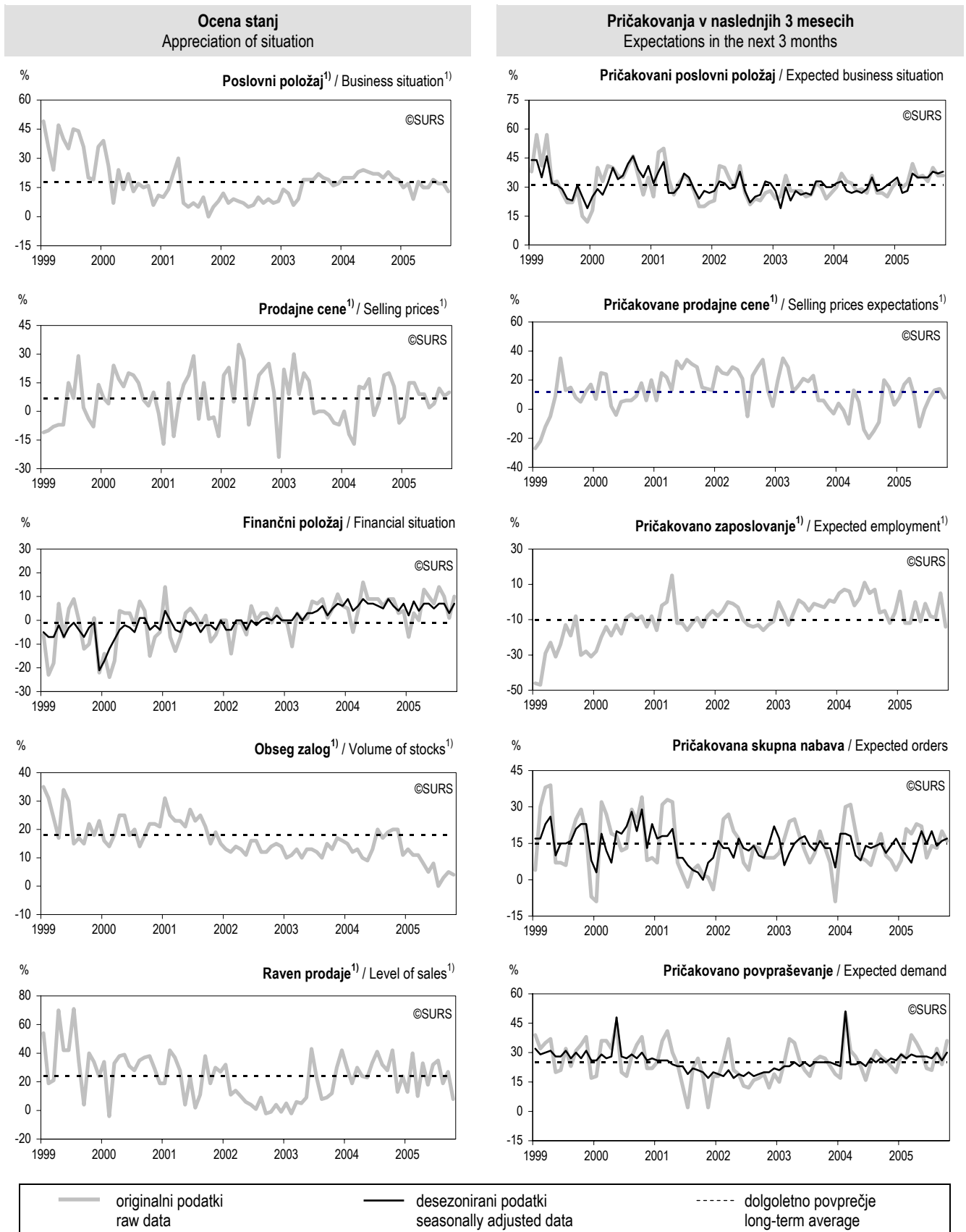
1. KAZALNIK ZAUPANJA<sup>1)</sup> V SLOVENIJI IN EU<sup>2)</sup> JANUAR 1999 - OKTOBER 2005  
CONFIDENCE INDICATOR<sup>1)</sup> IN SLOVENIA AND EU<sup>2)</sup> JANUARY 1999 - OCTOBER 2005



1) Kazalnik 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](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](http://europa.eu.int/comm/economy_finance/indicators/businessandconsumersurveys_en.htm)). Data for EU for the last month are not available.

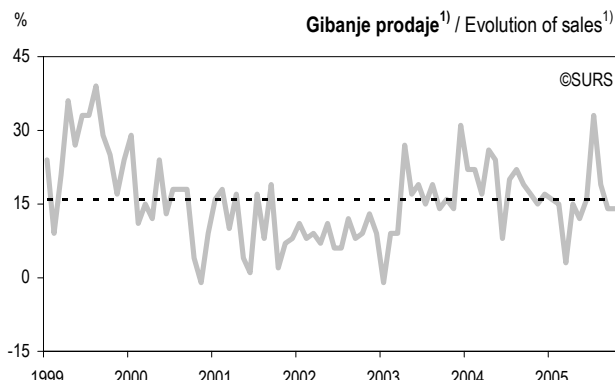
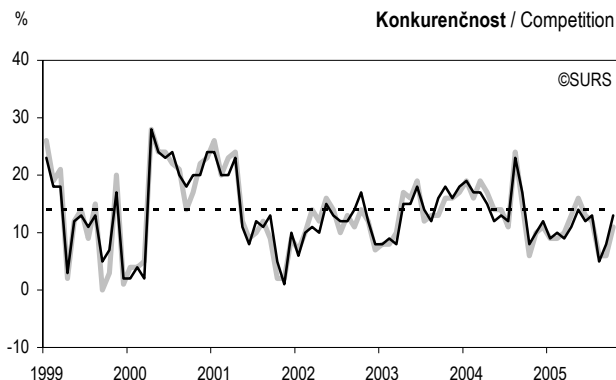
## 2. GIBANJE EKONOMSKIH KAZALCEV V TRGOVINI NA DROBNO V SLOVENIJI, JANUAR 1999 - OKTOBER 2005

### EVOLUTION OF ECONOMIC INDICATORS IN RETAIL TRADE IN SLOVENIA, JANUARY 1999 - OCTOBER 2005



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

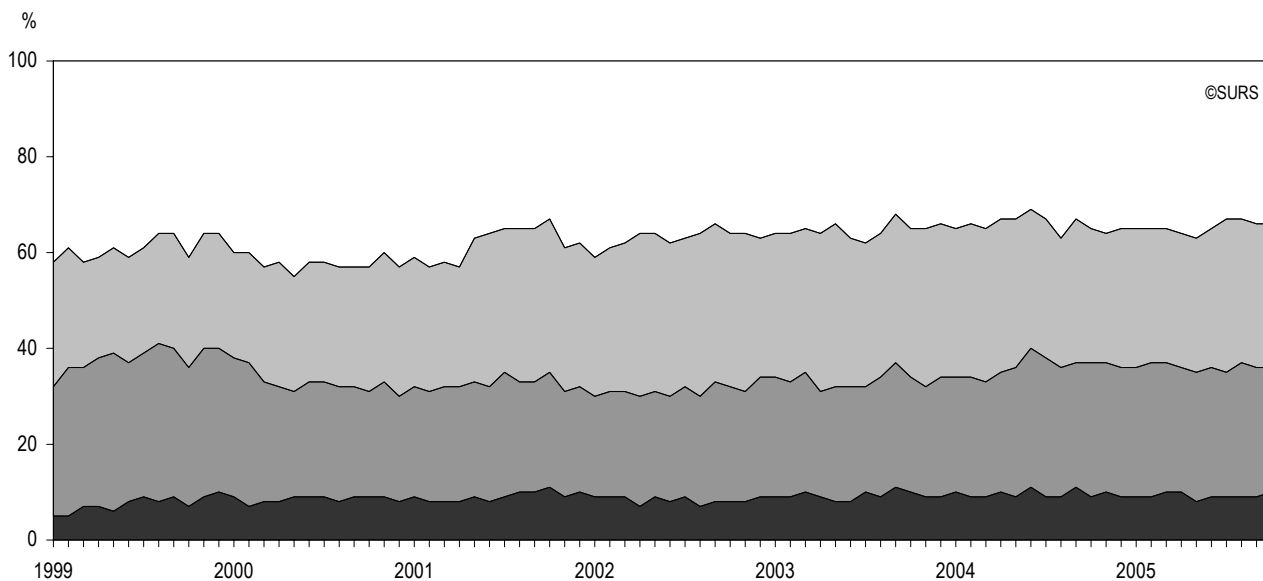
Ocena konkurenčnosti in gibanje prodaje / Appreciation of competition and evolution of sales



— 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:

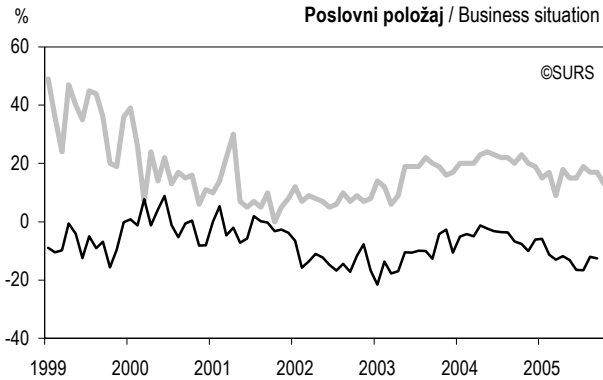
- Skupina "ni omejitev" zajema podjetja, ki nimajo težav pri prodaji.
- Skupina "težave s povpraševanjem" zajema podjetja, ki imajo težave z nizkim povpraševanjem in konkurenco v sektorju.
- Skupina "težave s ponudbo" zajema podjetja, ki imajo težave s slabo ponudbo, visokimi stroški dela, visoko ceno 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:

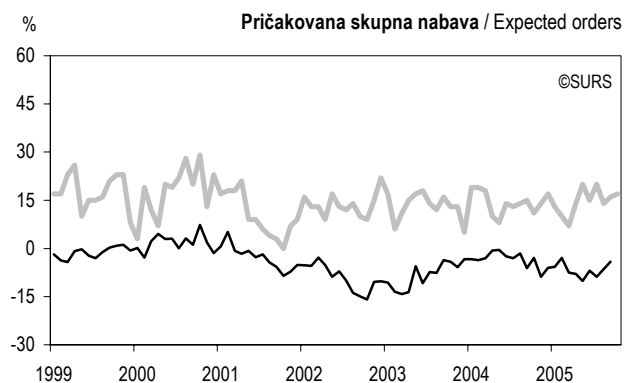
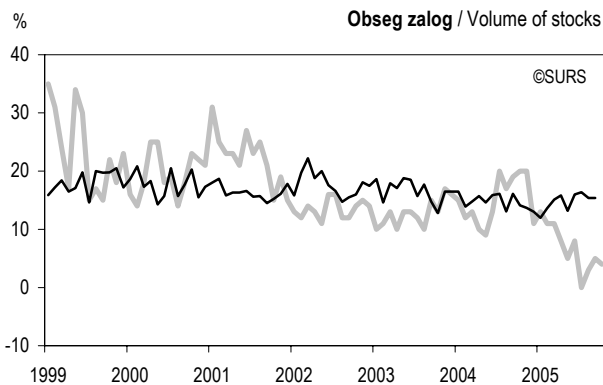
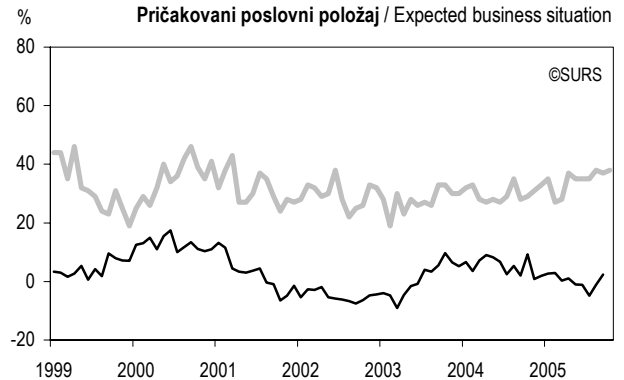
- Group "no limits" includes enterprises with no limits to retail.
- Group "demand difficulties" includes enterprises faced with low demand and competition in own sector.
- Group "supply difficulties" includes enterprises faced with bad supply, high cost of labour, high cost of finance, problems with 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 KAZALNIKOV V TRGOVINI NA DROBNO V SLOVENIJI IN EU<sup>1)</sup>, JANUAR 1999 – OKTOBER 2005 EVOLUTION OF ECONOMIC INDICATORS IN RETAIL TRADE IN SLOVENIA AND EU<sup>1)</sup>, JANUARY 1999 - OCTOBER 2005

#### Ocena stanja Appreciation of situation



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



— 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](http://europa.eu.int/comm/economy_finance/indicators/businessandconsumersurveys_en.htm)).  
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## 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 kazalnikov ter ocenitev njihovega gibanja v naslednjih mesecih. Rezultati anket so osnova za izračun kazalnika zaupanja v trgovini na drobno in kazalnika gospodarske klime, ki vključuje poleg kazalnika zaupanja v trgovini na drobno tudi kazalnik zaupanja pri potrošnikih in kazalnik 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 (2002) 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 kazalnikov (stanj in pričakovanj), ne pa dejanskih velikosti ekonomskih kazalnikov. 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 the Standard Classification of Activities (SKD, 2002) in retail trade or sale of motor vehicles in the following divisions:

- 50 - Sale, maintenance and repair of motor vehicles, retail sale of motor fuel
- 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 Companies Act).

### 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.

**Kazalnik 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 (tujih in domačih dobaviteljev) 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?
- Expectations 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

Desezonirana vrednost kazalnika zaupanja v trgovini na drobno je bila za 1 odstotno točko višja od preteklega meseca. V primerjavi z lanskim oktobrom in tudi lanskim povprečjem pa je vrednost zrasla za 5 odstotnih točk.

## OCENA STANJ

### POSLOVNI POLOŽAJ

V oktobru 2005 je bila vrednost kazalnika poslovni položaj v primerjavi s preteklim mesecem za 4 odstotne točke nižja, v primerjavi z istim mesecem lanskega leta in lanskim povprečjem pa je bila nižja za 10 oz. 8 odstotnih točk.

### PRODAJNE CENE

Vrednost kazalnika prodajne cene je bila v primerjavi s preteklim mesecem višja za 2 odstotni točki. V primerjavi z istim mesecem lani je bila vrednost kazalnika nižja za 10 odstotnih točk in 5 odstotnih točk nad povprečjem lanskega leta.

### FINANČNI POLOŽAJ

Desezonirana vrednost kazalnika finančni položaj je bila v primerjavi s preteklim mesecem višja za 4 odstotne točke. V primerjavi z istim mesecem lani in lanskim povprečjem je bila vrednost višja za 1 odstotno točko.

### OBSEG ZALOG

V oktobru 2005 se je kazalnik obsega zalog v primerjavi s preteklim mesecem znižal za 1 odstotno točko. V primerjavi z istim mesecem lani je bil nižji za 16 odstotnih točk in 11 odstotnih točk pod povprečjem lanskega leta.

### RAVEN PRODAJE

Vrednost kazalnika raven prodaje je v primerjavi s preteklim mesecem padla za 19 odstotnih točk. V primerjavi z istim mesecem lani je bila nižja za 34 odstotnih točk in za 20 odstotnih točk pod lanskim povprečjem.

## PRIČAKOVANJA

### PRIČAKOVANI POSLOVNI POLOŽAJ

V oktobru 2005 je desezonirana vrednost kazalnika pričakovani poslovni položaj v primerjavi s septembrom zrasla za 1 odstotno točko. V primerjavi z istim mesecem lani je bila višja za 9 odstotnih točk in 8 točk nad povprečjem lanskega leta.

### PRIČAKOVANE PRODAJNE CENE

Vrednost kazalnika pričakovane prodajne cene se je v primerjavi s preteklim mesecem znižala za 6 odstotnih točk, v primerjavi z oktobrom 2004 je bila nižja za 12 odstotnih točk in 9 odstotnih točk nad lanskim povprečjem.

### PRIČAKOVANO ZAPOSLOVANJE

V oktobru 2005 je bila vrednost kazalnika pričakovano zaposlovanje za 19 odstotnih točk nižja od septembrske vrednosti, v primerjavi z oktobrom 2004 je bila nižja za 9 odstotnih točk in v primerjavi z lanskim povprečjem za 15 odstotnih točk.

## COMMENT

The seasonally adjusted retail trade confidence indicator increased by 1 percentage point in comparison with the previous month. Compared to October 2004 and last year's average it rose by 5 percentage points.

## APPRECIATION OF SITUATION

### BUSINESS SITUATION

In October 2005 the business situation indicator was down by 4 percentage points. Compared to October 2004 it was down by 10 percentage points and compared to last year's average by 8 percentage points.

### SELLING PRICES

The indicator of the selling prices went up by 2 percentage points compared to September 2005. In comparison with October 2004 the value of the indicator went down by 10 percentage points, while compared to last year's average it was up by 5 percentage points.

### FINANCIAL SITUATION

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

### VOLUME OF STOCKS

In October 2005 the volume of stocks indicator was down by 1 percentage points compared to September 2005. Compared to October 2004 and last year's average it went down by 16 and 11 percentage points, respectively.

### LEVEL OF SALES

In comparison with September 2005 the indicator of the level of sales fell by 19 percentage points. Compared to October 2004 and compared to last year's average it was down by 34 and 20 percentage points.

## EXPECTATIONS

### EXPECTED BUSINESS SITUATION

In October 2005 the seasonally adjusted indicator of the expected business situation showed an increase of 1 percentage point compared to September 2005. It was up in comparison with October 2004 and last year's average by 9 and 7 percentage points, respectively.

### SELLING PRICES EXPECTATIONS

Selling prices expectations indicator was down by 6 percentage points compared to the previous month. In comparison to October 2004 it went down by 12 percentage points and was 9 percentage points above last year's average.

### EXPECTED EMPLOYMENT

In October 2005 the indicator of the expected employment went down by 19 percentage points in comparison with September 2005. Compared to October 2004 and to last year's average, it decreased by 9 and 15 percentage points, respectively.



**PRIČAKOVANA SKUPNA NABAVA**

V oktobru 2005 je bila desezonirana vrednost kazalnika pričakovana skupna nabava za 1 odstotno točko višja kot pretekli mesec. V primerjavi z istim mesecem lani je bila višja za 6 odstotnih točk in za 3 odstotne točke nad povprečjem lanskega leta.

**PRIČAKOVANO POVPRŠEVANJE**

Desezonirana vrednost kazalnika pričakovano povpraševanje se je zvišala v vseh treh primerjavah. V primerjavi s preteklim mesecem se je vrednost zvišala za 4 odstotne točke, v primerjavi z istim mesecem lani za 10 odstotnih točk in v primerjavi z lanskim povprečjem za 3 odstotne točke.

**KONKURENČNOST**

Desezonirana vrednost kazalnika konkurenčnost je bila za 5 odstotnih točk višja od vrednosti v preteklem mesecu. V primerjavi z istim mesecem lani je bila višja za 5 odstotnih točk in 2 odstotni točki pod lanskim povprečjem.

**GIBANJE PRODAJE ZA TO OBDOBJE LETA**

V oktobru 2005 je bila vrednost kazalnika gibanje prodaje za to obdobje leta v primerjavi s preteklim mesecem enaka. V primerjavi z istim mesecem lanskega leta in v primerjavi z lanskim povprečjem je vrednost tega kazalnika padla za 3 odstotne točke oz. 5 odstotnih točk.

**OMEJITVENI DEJAVNIKI V TRGOVINI NA DROBNO**

V oktobru 2005 se je v trgovini na drobno 34 % podjetij (oz. 29 % prihodka) srečevalo z dejavniki iz skupine *hude omejitve*. Delež teh podjetij je bil v primerjavi s preteklim mesecem enak in 1 odstotno točko nižji kot v oktobru 2004.

Podjetij, ki so se srečevala s skupino dejavnikov *težave s ponudbo*, je bilo 30 % (oz. 24 % prihodka), to je enak delež kot v preteklem mesecu in 2 odstotni točki višji kot v oktobru lani.

Podjetij, ki so se srečevala s skupino dejavnikov *težave s povpraševanjem*, je bilo 26 % (oz. 30 % prihodka), kar je bilo za 1 odstotno točko manj kot v preteklem mesecu in za 2 odstotni točki manj kot v oktobru 2004.

Podjetij, ki pri svojem poslovanju *niso imela omejitev*, je bilo 10 % (oz. 17 % prihodka) oziroma 1 odstotno točko več kot v preteklem mesecu in oktobra lani.

Podrobnejši pregled omejitvenih dejavnikov v trgovini na drobno<sup>1)</sup>:

- 47 % podjetij (ali 52 % prihodka) je omejevala konkurenca v sektorju,
- 39 % podjetij (ali 41 % prihodka) so omejevali visoki stroški dela,
- 31 % podjetij (ali 29 % prihodka) je omejevalo nezadostno povpraševanje,
- 22 % podjetij (ali 22 % prihodka) je omejevala visoka cena denarja,
- 14 % podjetij (ali 7 % prihodka) je omejevala premajhna prodajna površina,
- 13 % podjetij (ali 5 % prihodka) so omejevali drugi dejavniki, kot so finančna nedisciplina, visoke najemnine, slaba lokacija itd.,

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%.

**EXPECTED ORDERS**

In October 2005 the seasonally adjusted indicator of the expected orders rose by 1 percentage point compared to September 2005. The indicator went up by 6 percentage points when compared to October 2004 and by 3 percentage points when compared to last year's average.

**EXPECTED DEMAND**

The seasonally adjusted indicator of the expected demand increased in all three comparisons. Compared to the previous month it was up by 4 percentage points, compared to October 2004 by 10 percentage points and compared to last year's average by 3 percentage points.

**COMPETITION**

In comparison with the previous month, the seasonally adjusted indicator of the competition went up by 5 percentage points. Compared to October 2004 it was up by 5 percentage points and 2 percentage points below last year's average.

**EVOLUTION OF SALES FOR THIS PERIOD OF YEAR**

In October 2005 the value of the evolution of sales indicator remained the same as in the previous month. In comparison with October 2004 and last year's average it was down by 3 and 5 percentage points, respectively.

**OBSTACLES IN RETAIL TRADE**

In October 2005 34% of enterprises in retail trade (29% of turnover) were faced with "severe obstacles" in trading. Compared to the previous month the share was equal and 1 percentage point lower than in October 2004.

The share of enterprises faced with "supply difficulties" was 30% (24% of turnover). This share was equal as in the previous month and 2 percentage points higher than in October 2004.

The share of enterprises faced with "demand difficulties" was 26% (30% of turnover), which was 1 percentage point less than in September 2005 and 2 percentage points less than in October 2004.

Only 10% of enterprises (17% of turnover) experienced *no obstacles*. The share of these enterprises was 1 percentage point higher compared to the previous month and to October 2004.

A more detailed overview of obstacles in retail trade<sup>1)</sup> shows that:

- 47% of enterprises (or 52% of turnover) were limited by competition in their own sector,
- 39% of enterprises (or 41% of turnover) were limited by high cost of labour,
- 31% of enterprises (or 29% of turnover) were limited by insufficient demand,
- 22% of enterprises (or 22% of turnover) were limited by the high cost of money,
- 14% of enterprises (or 7% of turnover) were limited by shortage of sales surface,
- 13% of enterprises (or 5% of turnover) were limited by other factors such as lack of financial discipline, high rents, bad location, etc.,





- 10 % podjetij (ali 4 % prihodka) je omejevala dostopnost do bančnih posojil,
  - 10 % podjetij (ali 17 % prihodka) ni imelo omejitev v poslovanju,
  - 7 % podjetij (ali 3 % prihodka) so omejevali premajhni skladiščni prostori,
  - 2 % podjetij (ali 1 % prihodka) je omejevala slaba ponudba.
- 10% of enterprises (or 4% of turnover) were limited in their access to bank credits,
  - 10% of enterprises (or 17% of turnover) experienced no obstacles,
  - 7% of enterprises (or 3% of turnover) were limited by small storage capacity,
  - 2% of enterprises (or 1% of turnover) were limited by supply shortage.

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