STATISTIČNI URAD REPUBLIKE SLOVENIJE
STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA

STATISTIČNE INFORMACIJE
RAPID REPORTS

3. JUNIJ 2005
3 JUNE 2005

št./No 156

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

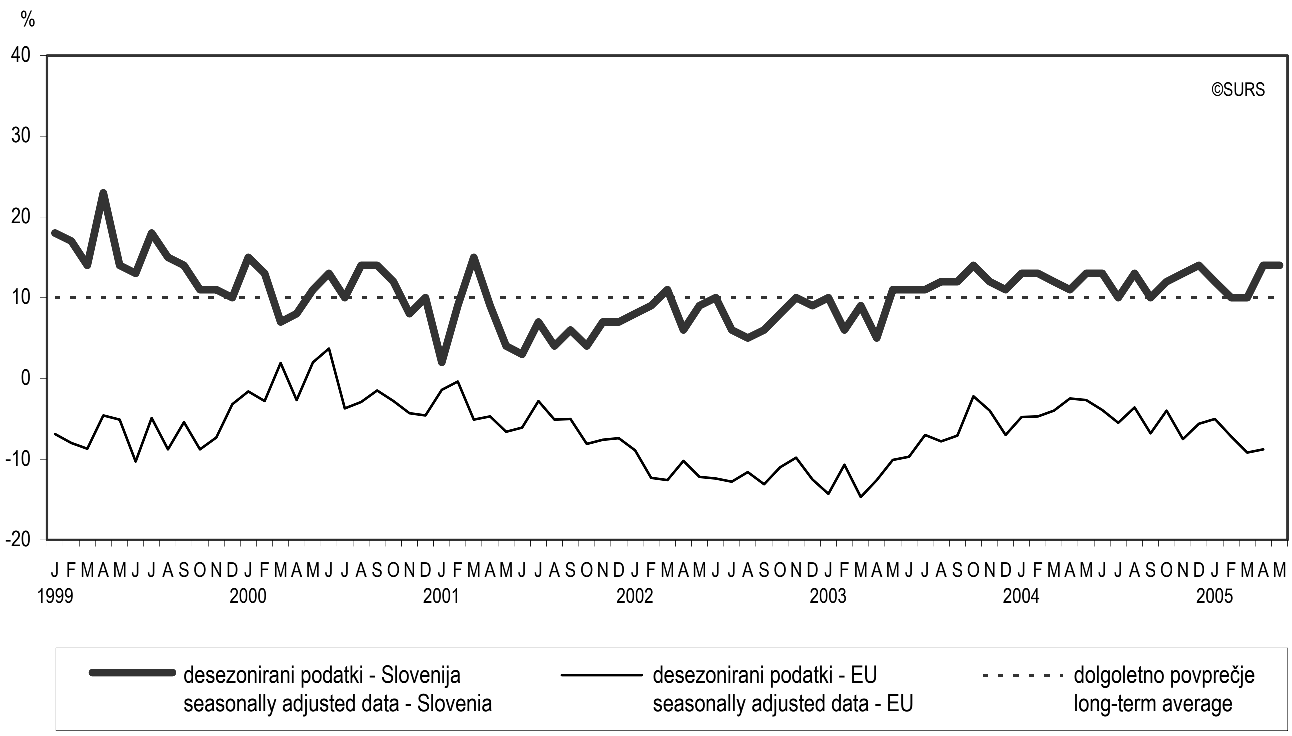
št./No 27

POSLOVNE TENDENCE V TRGOVINI NA DROBNO, SLOVENIJA, MAJ 2005
BUSINESS TENDENCY IN RETAIL TRADE, SLOVENIA, MAY 2005

- V maju 2005 je desezonirana vrednost kazalca zaupanja v trgovini na drobno ostala enaka, kot je bila v preteklem mesecu. Vrednost kazalca se je dvignila v primerjavi z lanskim majem in v primerjavi z lanskim povprečjem, in sicer za 1 odstotno točko oziroma 2 odstotni točki.
- Na gibanje vrednosti kazalca zaupanja sta vplivali slabši oceni *sedanjega* in *pričakovanega poslovnega položaja* in tudi ocena o zmanjšanem *obsegu zalog*.
- Večina kazalcev stanj se je poslabšala. Le kazalec konkurenčnost se je izboljšal, medtem ko je kazalec prodajne cene ostal nespremenjen. Tudi večina kazalcev pričakovanj se je poslabšala. Izjema sta bila kazalca pričakovana skupna nabava, ki se je izboljšal, in pričakovano povpraševanje, ki je ostal enak.

- In May 2005 the seasonally adjusted retail trade confidence indicator remained the same as it was in the previous month. The indicator went up compared to May 2004 as well as to last year's average, i.e. by 1 percentage point and 2 percentage points, respectively.
- This development of the confidence indicator was influenced by the worsening in the assessment of the *present* and *expected business situation* as well as by the assessment of decreased *volume of stocks*.
- Situation indicators mostly worsened. Only the indicator of the competition improved while the selling prices indicator remained unchanged. The expectation indicators mostly worsened also. Exceptions were indicators of the expected orders, which improved, and expected demand, which stayed the same.

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



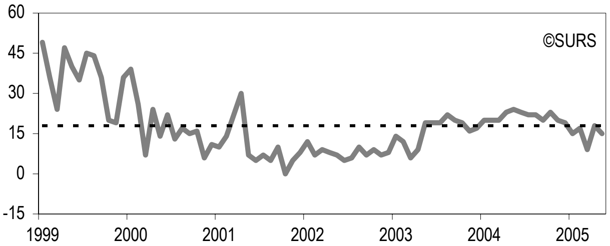
1) Kazalec zaupanja je povprečje odgovorov (ravnotežij) na vprašanja o sedanjem in pričakovanem poslovnem položaju ter sedanjem obsegu zalog (obrnjen predznak).
The confidence indicator is an average of responses (balances) to questions on present and expected business situation and present volume of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

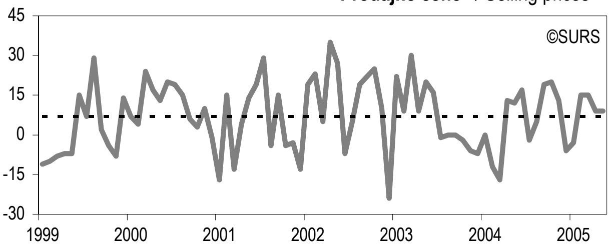
2. GIBANJE EKONOMSKIH KAZALCEV V TRGOVINI NA DROBNO V SLOVENIJI, JANUAR 1999 - MAJ 2005
EVOLUTION OF ECONOMIC INDICATORS IN RETAIL TRADE IN SLOVENIA, JANUARY 1999 - MAY 2005

Ocena stanj
Appreciation of situation

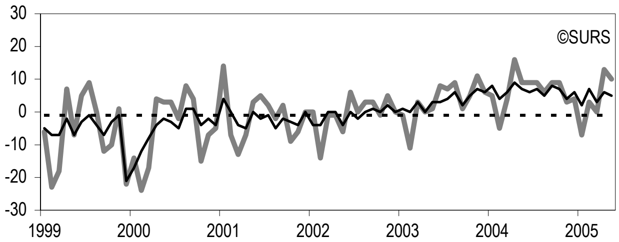
Poslovni položaj[1)] / Business situation[1)]



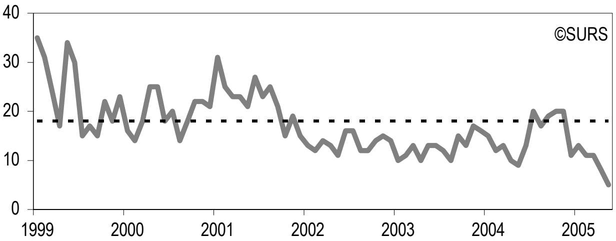
Prodajne cene[1)] / Selling prices[1)]



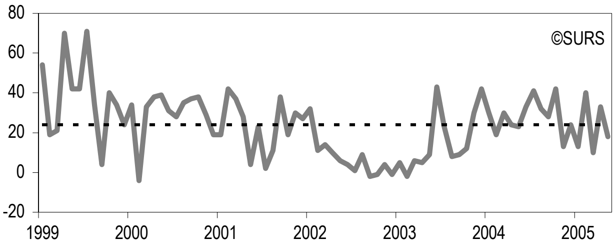
Finančni položaj / Financial situation



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

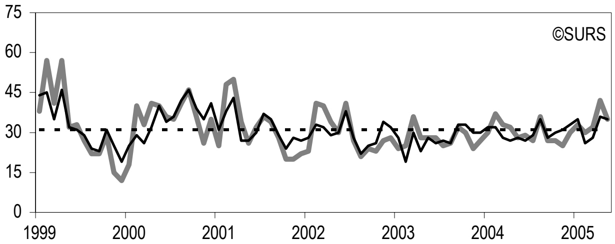


Raven prodaje[1)] / Level of sales[1)]

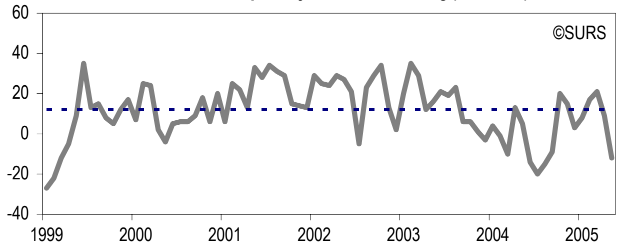


Pričakovanja v naslednjih 3 mesecih
Expectations in the next 3 months

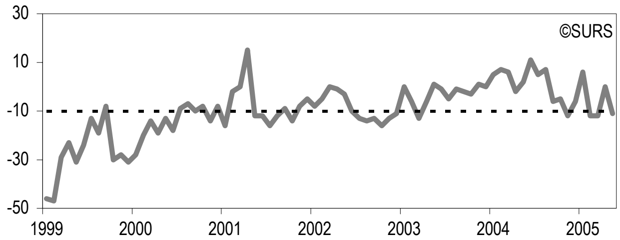
Pričakovani poslovni položaj / Expected business situation



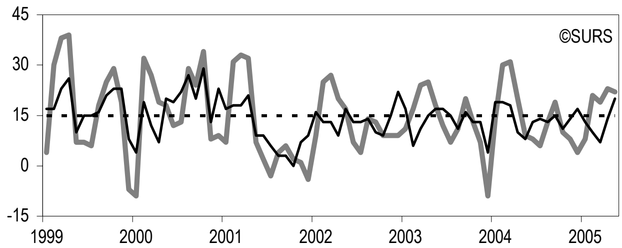
Pričakovane prodajne cene[1)] / Selling prices expectations[1)]



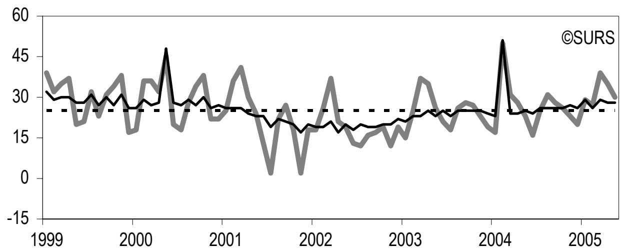
Pričakovano zaposlovanje[1)] / Expected employment[1)]



Pričakovana skupna nabava / Expected orders



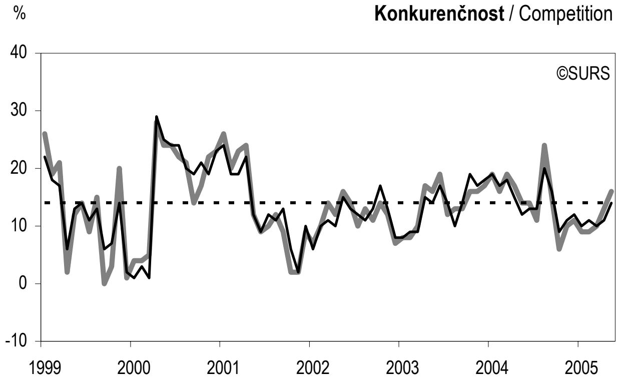
Pričakovano povpraševanje / Expected demand

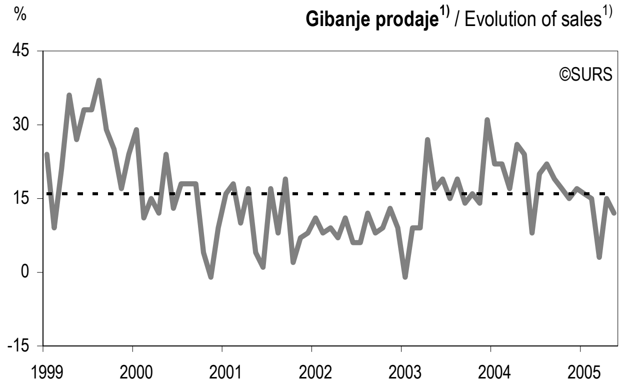


originalni podatki raw data	desezonirani podatki seasonally adjusted data	dolgoletno povprečje long-term average

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

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

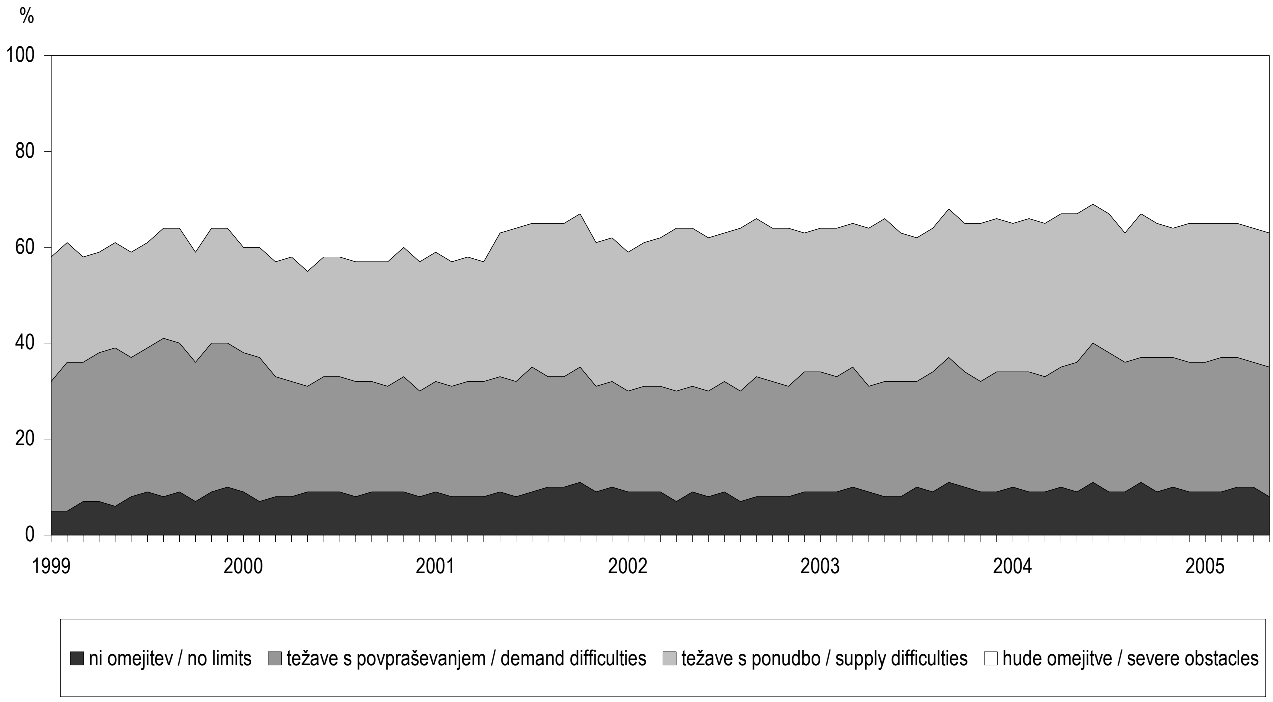




originalni podatki raw data	desezonirani podatki seasonally adjusted data	dolgoletno povprečje long-term average

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

Omejitveni dejavniki v trgovini na drobno / Obstacles in retail trade



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".

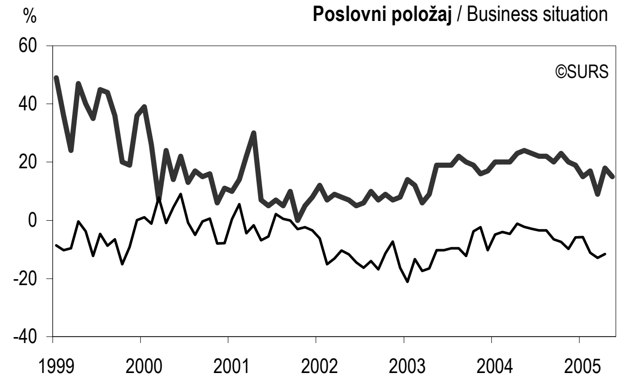
The chart on retail trade obstacles shows the share of enterprises faced with the following groups of problems:

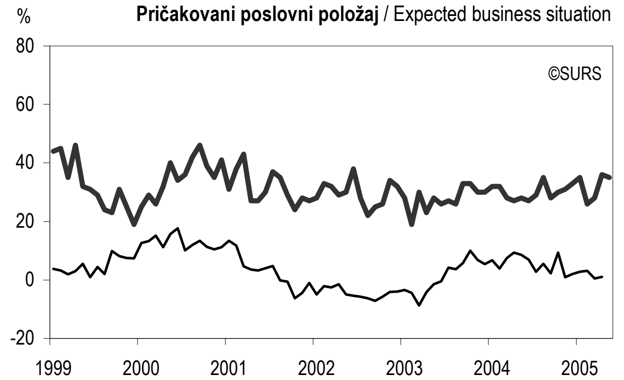
- Group **"no limits"** includes enterprises with no limits to retail.
- Group **"demand difficulties"** includes enterprises faced with low demand and competition in own sector.
- Group **"supply difficulties"** includes enterprises faced with bad supply, high cost of labour, high cost of finance, problems 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.

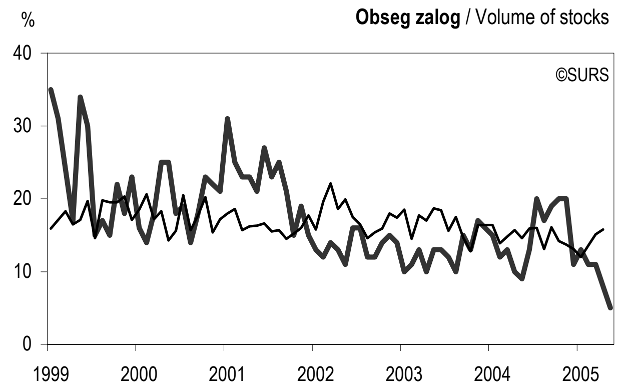
3. GIBANJE EKONOMSKIH KAZALCEV V TRGOVINI NA DROBNO V SLOVENIJI IN EU[1], JANUAR 1999 - MAJ 2005

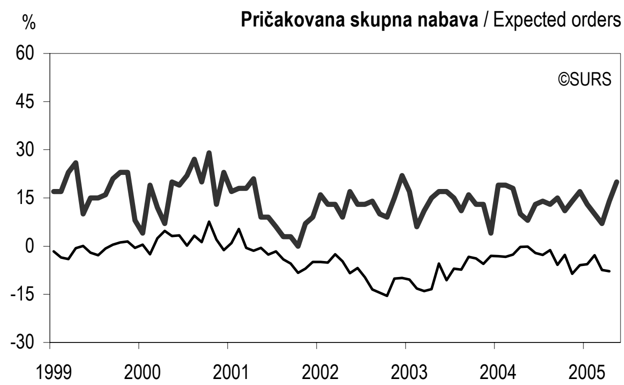
EVOLUTION OF ECONOMIC INDICATORS IN RETAIL TRADE IN SLOVENIA AND EU[1], JANUARY 1999 - MAY 2005

Ocena stanj 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) Vir podatkov je Evropska komisija (http://europa.eu.int/comm/economy_finance/indicators/businessandconsumersurveys_en.htm).
Podatki o EU za zadnji mesec niso na voljo. Podatki so desezonirani.

Source for EU data is European Commission (http://europa.eu.int/comm/economy_finance/indicators/businessandconsumersurveys_en.htm).
Data for EU for the last month are not available. Data are seasonally adjusted.

METODOLOŠKA POJASNILA

NAMEN STATISTIČNEGA RAZISKOVANJA

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

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

ENOTA OPAZOVANJA

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

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

Vzorec podjetij je oblikovan na podlagi dveh meril:

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

VIRI

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

ZAJETJE

V panelni vzorec smo zajeli vsa velika in srednje velika podjetja ter 32 % malih podjetij (ali 39 % prihodka malih podjetij), ki so razvrščena v dejavnost trgovine na drobno ali trgovine z motornimi vozili. Opisani panelni vzorec pokriva 43 % podjetij vzorčnega okvira ali 94 % prihodka v trgovini na drobno in 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.

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

OBSERVATION UNITS

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

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

They were selected into the panel by two criteria:

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

SOURCES

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

COVERAGE

The panel includes all large and medium-sized enterprises and 32% of small enterprises (or 39% of their turnover), the principal activity of which is classified into retail trade and sale of motor vehicles. The panel covers 43% of enterprises of the studied population or 94% of turnover in retail trade and sale of motor vehicles.

METHOD OF DATA COLLECTION

The survey is carried out monthly by mail.

WEIGHTS FOR RESPONSES

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

NON-RESPONSES

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

DEFINITIONS AND EXPLANATIONS

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

Grafi prikazujejo **desezonirane vrednosti.** To so vrednosti, pri katerih je izločen vpliv sezonskih dejavnikov, vsebujejo pa trend - cikel in naključno komponento. Podatki za EU so desezonirani z metodo DAINTIES, za Slovenijo pa z metodo TRAMO/SEATS, ki temelji na ARIMA modelih.

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 maju 2005 je desezonirana vrednost kazalca zaupanja v trgovini na drobno ostala enaka, kot je bila v preteklem mesecu. Na gibanje vrednosti kazalca zaupanja sta vplivali slabši oceni *sedanjega* in *pričakovanega poslovnega položaja* in tudi ocena o zmanjšanem *obsegu zalog*. Vrednost kazalca se je dvignila v primerjavi z lanskim majem in v primerjavi z lanskim povprečjem, in sicer za 1 odstotno točko oziroma 2 odstotni točki.

OCENA STANJ

POSLOVNI POLOŽAJ

V maju 2005 je bil zabeželen padec kazalca poslovni položaj v vseh treh primerjavah. V primerjavi s preteklim mesecem je padel za 3 odstotne točke, v primerjavi z istim mesecem lanskega leta za 9 odstotnih točk in v primerjavi z lanskim povprečjem za 6 odstotnih točk.

PRODAJNE CENE

Vrednost kazalca prodajne cene je v mesečni primerjavi ostala nespremenjena. Padec vrednosti kazalca za 3 odstotne točke je bil zabeležen v primerjavi z istim mesecem lanskega leta, medtem ko se je le-ta v primerjavi z lanskim povprečjem dvignila za 4 odstotne točke.

FINANČNI POLOŽAJ

Desezonirana vrednost kazalca finančni položaj se je v primerjavi s preteklim mesecem malo znižala (za 1 odstotno točko). V primerjavi z majem 2004 se je vrednost dvignila za 1 odstotno točko in za 1 odstotno točko padla v primerjavi z lanskoletnim povprečjem.

OBSEG ZALOG

Obseg zalog se je v vseh treh primerjavah zmanjšal. V primerjavi s preteklim mesecem se je zmanjšal za 3 odstotne točke, v primerjavi z istim mesecem lani za 4 odstotne točke in v primerjavi z lanskim povprečjem za 10 odstotnih točk.

RAVEN PRODAJE

Vrednost kazalca raven prodaje je izrazito padla v primerjavi s preteklim mesecem, in sicer za 15 odstotnih točk. V primerjavi z majem 2004 je bila vrednost nižja za 5 odstotnih točk in v primerjavi z lanskim povprečjem za 10 odstotnih točk.

PRIČAKOVANJA

PRIČAKOVANI POSLOVNI POLOŽAJ

Desezonirana vrednost kazalca pričakovani poslovni položaj je v primerjavi z aprilom 2005 nekoliko padla (za 1 odstotno točko). V primerjavi z majem 2004 se je vrednost dvignila za 7 odstotnih točk in v primerjavi z lanskim povprečjem za 5 odstotnih točk.

PRIČAKOVANE PRODAJNE CENE

Vrednost kazalca pričakovane prodajne cene se je opazno poslabšala. V primerjavi s preteklim mesecem je vrednost padla za 21 odstotnih točk, v primerjavi z majem 2004 za 17 odstotnih točk in bila 11 odstotnih točk pod lanskim povprečjem.

COMMENT

In May 2005 the seasonally adjusted retail trade confidence indicator remained the same as it was in the previous month. This development of the confidence indicator was influenced by the worsening in the assessment of the *present* and *expected business situation* as well as by the assessment of decreased *volume of stocks*. The indicator went up compared to May 2004 as well as to last year's average, i.e. by 1 percentage point and 2 percentage points, respectively.

APPRECIATION OF SITUATION

BUSINESS SITUATION

In May 2005 the overall fall of the business situation indicator was recorded. Compared to the previous month it fell by 3 percentage points, compared to May 2004 by 9 percentage points and compared to last year’s average by 6 percentage points.

SELLING PRICES

In a month-to-month comparison the indicator of the selling prices remained unchanged. A fall of the indicator by 3 percentage points was recorded in comparison with May 2004, while it went up in comparison with last year’s average by 4 percentage points.

FINANCIAL SITUATION

The seasonally adjusted indicator of the financial situation slightly decreased (by 1 percentage point) compared to the previous month. Compared to May 2004 it went up by 1 percentage point and it fell by 1 percentage point compared to last year’s average.

VOLUME OF STOCKS

The volume of stocks decreased in all three comparisons. Compared to the previous month it went down by 3 percentage points, compared to May 2004 by 4 percentage points and compared to last year’s average by 10 percentage points.

LEVEL OF SALES

The indicator of the level of sales plummeted by 15 percentage points compared to the previous month. Compared to May 2004 it went down by 5 percentage points and compared to last year’s average by 10 percentage points.

EXPECTATIONS

EXPECTED BUSINESS SITUATION

The seasonally adjusted indicator of the expected business situation showed a small decline (by 1 percentage point) compared to April 2005. In comparison with May 2004 it rose by 7 percentage points and compared to last year’s average by 5 percentage points.

SELLING PRICES EXPECTATIONS

The selling prices expectations indicator markedly worsened. Compared to the previous month its value dropped by 21 percentage points, compared to May 2004 by 17 percentage points and compared to last year’s average by 11 percentage points.

PRIČAKOVANO ZAPOSLOVANJE

V maju 2005 je vrednost kazalca pričakovano zaposlovanje padla, in sicer v primerjavi z aprilom 2005 za 11 odstotnih točk, v primerjavi z majem 2004 za 13 odstotnih točk in za 12 odstotnih točk v primerjavi z lanskim povprečjem.

PRIČAKOVANA SKUPNA NABAVA

V primerjavi z aprilom 2005 je bila desezonirana vrednost kazalca pričakovana skupna nabava v maju 2005 višja za 6 odstotnih točk. V primerjavi z majem 2004 je bila vrednost višja za 13 odstotnih točk, v primerjavi z lanskim povprečjem pa za 6 odstotnih točk.

PRIČAKOVANO POVPRAŠEVANJE

V maju 2005 je desezonirana vrednost kazalca pričakovano povpraševanje ostala enaka, kot je bila v preteklem mesecu. V primerjavi z istim mesecem lani in z lanskim povprečjem je bila njegova vrednost višja za 7 odstotnih točk oziroma 1 odstotno točko.

KONKURENČNOST

Desezonirana vrednost kazalca konkurenčnost se je dvignila za 3 odstotne točke v primerjavi s preteklim mesecem. V primerjavi z istim mesecem lani je bila njegova vrednost višja za 2 odstotni točki, vendar je bila 1 odstotno točko pod lanskim povprečjem.

GIBANJE PRODAJE ZA TO OBDOBJE LETA

Vrednost kazalca gibanje prodaje za to obdobje leta je bila za 3 odstotne točke nižja v primerjavi z aprilom 2005. Po drugi strani se je njegova vrednost opazno spustila v primerjavi z istim mesecem lanskega leta (za 12 odstotnih točk) in tudi glede na lansko povprečje (za 7 odstotnih točk).

OMEJITVENI DEJAVNIKI V TRGOVINI NA DROBNO

V trgovini na drobno se je 37 % podjetij (oz. 25 % prihodka) srečevalo z dejavniki iz skupine *"hude omejitve"*. Delež teh podjetij se je v primerjavi s preteklim mesecem kot tudi v primerjavi z istim mesecem lanskega leta dvignil, in sicer za 1 odstotno točko oziroma 4 odstotne točke.

Podjetij, ki so se srečevala s skupino dejavnikov *"težave s ponudbo"*, je bilo 28 % (oz. 25 % prihodka). Delež teh podjetij je bil enak kot v preteklem mesecu, medtem ko je glede na maj 2004 padel za 3 odstotne točke.

Podjetij, ki so se srečevala s skupino dejavnikov *"težave s povpraševanjem"*, je bilo 27 % (oz. 30 % prihodka), kar je bilo za 1 odstotno točko več kot v preteklem mesecu in enako, kot je bilo kot v lanskem maju.

Podjetij, ki *niso imela omejitev* v poslovanju, je bilo 8 % (oz. 20 % prihodka). Delež teh podjetij se je zmanjšal tako glede na pretekli mesec (za 2 odstotni točki) kot tudi glede na maj 2004 (za 1 odstotno točko).

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

- 50 % podjetij (ali 45 % prihodka) je omejevala konkurenca v sektorju,
- 37 % podjetij (ali 37 % prihodka) so omejevali visoki stroški dela,
- 32 % podjetij (ali 30 % prihodka) je omejevalo nezadostno povpraševanje,
- 21 % podjetij (ali 23 % prihodka) je omejevala visoka cena denarja,

EXPECTED EMPLOYMENT

In May 2005 the indicator of the expected employment fell noticeably in all three comparisons. In comparison with April 2005 by 11 percentage points, in comparison with May 2004 by 13 percentage points and in comparison with last year's average by 12 percentage points.

EXPECTED ORDERS

In comparison with April 2005, in May 2005 the seasonally adjusted indicator of the expected orders increased by 6 percentage points. Compared to May 2004 it rocketed by 13 percentage points and compared to last year's average it went up by 6 percentage points.

EXPECTED DEMAND

In May 2005 the seasonally adjusted indicator stayed the same as it was in the previous month. Compared to May 2004 and to last year's average its value grew by 7 percentage points and by 1 percentage point, respectively.

COMPETITION

The seasonally adjusted indicator of the competition increased by 3 percentage points compared to the last month. Compared to May 2004 it went up also, i.e. by 2 percentage points, but it was 1 percentage point below last year's average.

EVOLUTION OF SALES FOR THIS PERIOD OF YEAR

The value of the evolution of sales indicator slid by 3 percentage points compared to April 2005. On the other hand, it noticeably worsened compared to the same month of 2004 (by 12 percentage points) as well as in comparison with last year's average (by 7 percentage points).

OBSTACLES IN RETAIL TRADE

In retail trade 37% of enterprises (25% of turnover) were faced with *"severe obstacles"* in trading. Compared to the previous month as well as to the same month of the last year the share of these enterprises rose, i.e. by 1 and 4 percentage points, respectively.

The share of enterprises faced with *"supply difficulties"* was 28% (25% of turnover). This share was the same compared to the previous month while it fell by 3 percentage points compared to May 2004.

The share of enterprises faced with *"demand difficulties"* was 27% (30% of turnover), which was 1 percentage point more than in the previous month and the same as in May 2004.

Only 8% of enterprises (20% of turnover) experienced *no obstacles.* The share of these enterprises was lower compared to the previous month (by 2 percentage points) as well as compared to May 2004 (by 1 percentage point).

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

- 50% of enterprises (or 45% of turnover) were limited by competition in own sector,
- 37% of enterprises (or 37% of turnover) were limited by high cost of labour,
- 32% of enterprises (or 30% of turnover) were limited by insufficient demand,
- 21% of enterprises (or 23% of turnover) were limited by high cost of money,

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

- 14 % podjetij (ali 7 % prihodka) je omejevala premajhna prodajna površina,
- 12 % podjetij (ali 4 % prihodka) so omejevali drugi dejavniki, kot so finančna nedisciplina, visoke najemnine, slaba lokacija itd.,
- 11 % podjetij (ali 4 % prihodka) je omejevala dostopnost do bančnih kreditov,
- 9 % podjetij (ali 21 % prihodka) ni imelo omejitev v poslovanju,
- 9 % podjetij (ali 4 % prihodka) so omejevali premajhni skladiščni prostori,
- 2 % podjetij (ali 1 % prihodka) je omejevala slaba ponudba.

- 14% of enterprises (or 7% of turnover) were limited by shortage of sales surface,
- 12% of enterprises (or 4% of turnover) were limited by other factors such as lack of financial discipline, high rents, bad location, etc.,
- 11% of enterprises (or 4% of turnover) were limited by access to bank credits,
- 9% of enterprises (or 21% of turnover) experienced no obstacles,
- 9% of enterprises (or 4% of turnover) were limited by small storage capacity,
- 2% of enterprises (or 1% of turnover) were limited by supply shortage.

Statistično raziskovanje je sofinancirala Evropska komisija. Za objavljene podatke in besedila je odgovoren izključno Statistični urad Republike Slovenije in ne Evropska komisija.

The business survey is co-financed by the European Commission. However, the European Commission accepts no responsibility or liability whatsoever with regard to the material published in this publication.

Sestavila / Prepared by: Darja Regoršek

Izdaja, založba in tisk Statistični urad Republike Slovenije, Ljubljana, Vožarski pot 12 - **Uporaba in objava podatkov dovoljena le z navedbo vira** - Odgovarja generalna direktorica mag. Irena Križman - Urednica zbirke Statistične informacije Marina Urbas – Urednica podzbirke Darja Regoršek - Slovensko besedilo jezikovno uredila Joža Lakovič - Angleško besedilo jezikovno uredil Boris Panič - Naklada 100 izvodov - ISSN zbirke Statistične informacije 1408-192X - ISSN podzbirke Trgovina in druge storitvene dejavnosti 1408-9327 - Informacije daje Informacijsko središče, tel.: (01) 241 51 04 - El. pošta: info.stat@gov.si - http://www.stat.si.

Edited, published and printed by the Statistical Office of the Republic of Slovenia, Ljubljana, Vožarski pot 12 - **These data can be used provided the source is acknowledged** - Director-General Irena Križman - Rapid Reports editor Marina Urbas – Subject-matter editor Darja Regoršek - Slovene language editor Joža Lakovič - English language editor Boris Panič - Total print run 100 copies - ISSN of Rapid Reports 1408-192X - ISSN of subcollection Distributive trade and other service activities 1408-9327 - Information is given by the Information Centre of the Statistical Office of the Republic of Slovenia, tel.: +386 1 241 51 04 - E-mail: info.stat@gov.si - http://www.stat.si.