STATISTIČNI URAD REPUBLIKE SLOVENIJE
STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA

STATISTIČNE INFORMACIJE
RAPID REPORTS

5. JANUAR 2006
5 JANUARY 2006

št./No 3

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

št./No 1

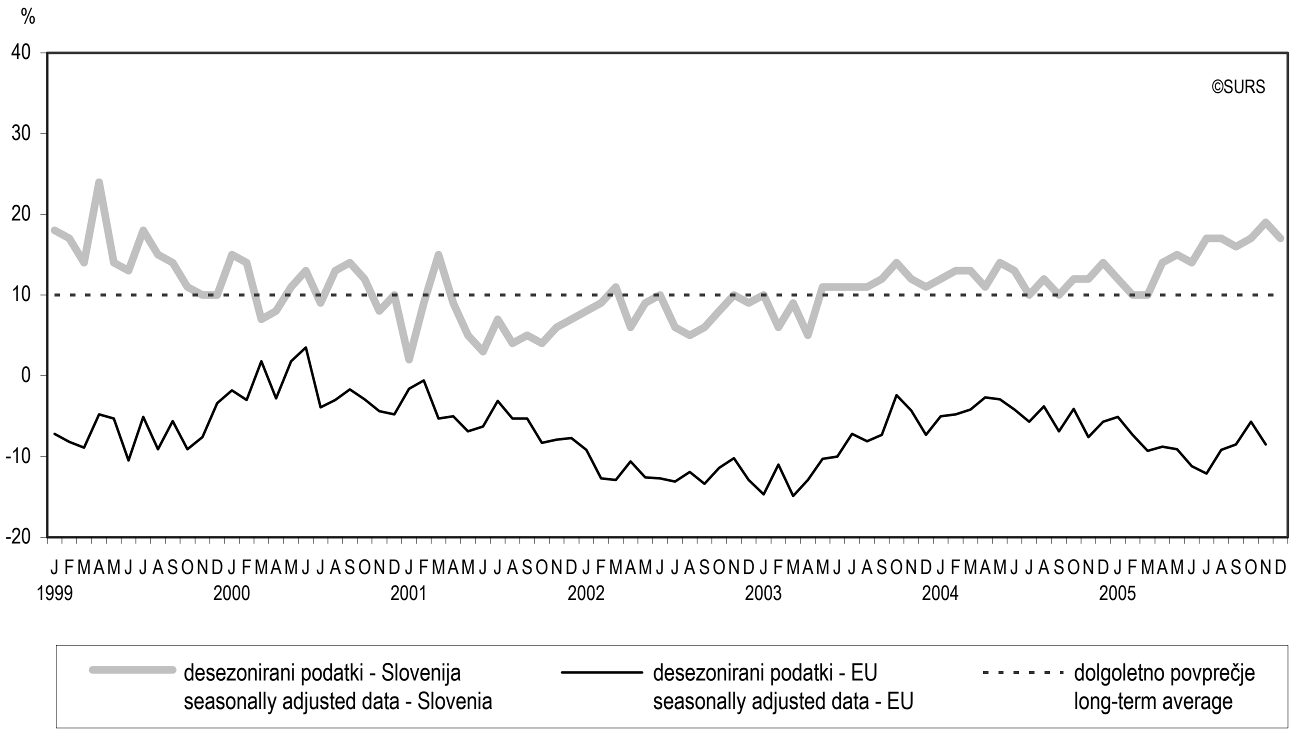
# POSLOVNE TENDENCE V TRGOVINI NA DROBNO, SLOVENIJA, DECEMBER 2005

## BUSINESS TENDENCY IN RETAIL TRADE, SLOVENIA, DECEMBER 2005

- Desezonirana vrednost kazalnika zaupanja v trgovini na drobno je bila za 2 odstotni točki nižja od preteklega meseca. V primerjavi z lanskim decembrom in tudi lanskim povprečjem pa je vrednost zrasla za 3 oz. 5 odstotnih točk.
- Na gibanje vrednosti kazalnika zaupanja sta vplivali predvsem ocena poslovnega položaja in ocena pričakovanega poslovnega položaja.
- Kazalniki stanj so se v primerjavi s preteklim mesecem večinoma izboljšali (razen kazalnika obsega zalog in kazalnika prodajnih cen). Kazalniki pričakovanj so se poslabšali, izjema je kazalnik pričakovanega zaposlovanja.

- The seasonally adjusted retail trade confidence indicator decreased by 2 percentage points in comparison with the previous month. Compared to December 2004 and last year's average it was up by 3 and 5 percentage points.
- This development of the indicator was mainly influenced by the assessment of the present and expected business situation.
- The observed indicators for appreciation of the situation mainly increased compared to the previous month (except the volume of stocks and appreciation of selling prices). The expectations for the next three months deteriorated, except for expected employment.

**1. KAZALNIK ZAUPANJA[1)] V SLOVENIJI IN EU[2)] JANUAR 1999 - DECEMBER 2005**
CONFIDENCE INDICATOR[1)] IN SLOVENIA AND EU[2)] JANUARY 1999 - DECEMBER 2005



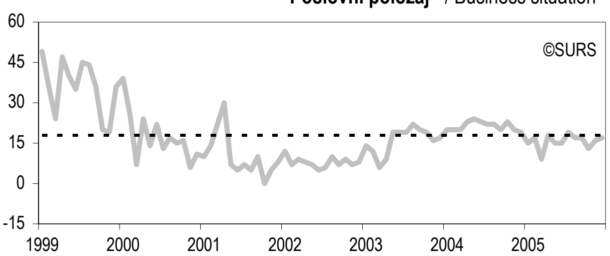

1) Kazalnik zaupanja je povprečje odgovorov (ravnotežij) na vprašanja o sedanjem in pričakovanem poslovnem položaju ter sedanjem obsegu zalog (obrnjen predznak).
The confidence indicator is an average of responses (balances) to questions on present and expected business situation and present volume of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

2) Vir podatkov je Evropska komisija (http://europa.eu.int/comm/economy_finance/indicators/businessandconsumersurveys_en.htm). 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 last month are not available.

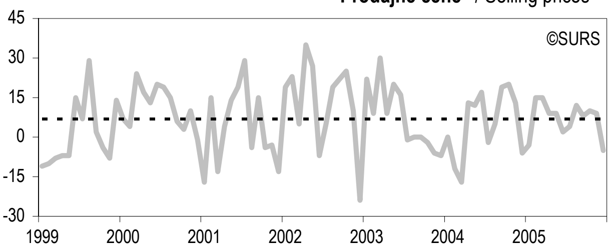
## 2. GIBANJE EKONOMSKIH KAZALCEV V TRGOVINI NA DROBNO V SLOVENIJI, JANUAR 1999 - DECEMBER 2005
EVOLUTION OF ECONOMIC INDICATORS IN RETAIL TRADE IN SLOVENIA, JANUARY 1999 - DECEMBER 2005

### Ocena stanj
Appreciation of situation

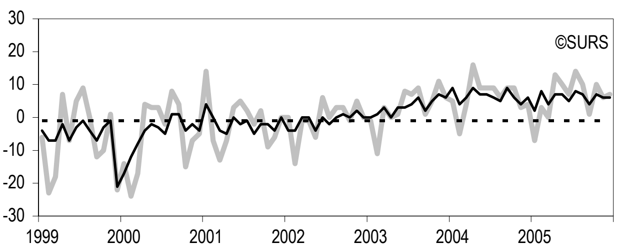
**Poslovni položaj**[1)] / Business situation[1)]



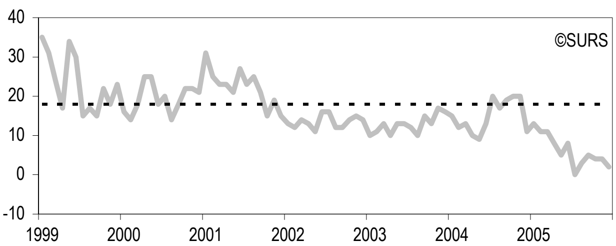

**Prodajne cene**[1)] / Selling prices[1)]



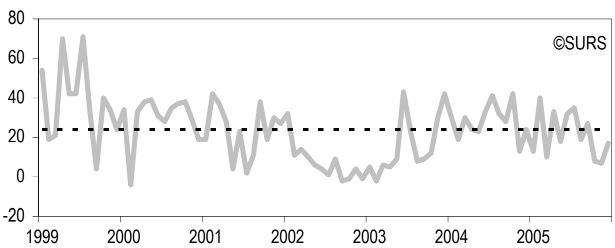

**Finančni položaj** / Financial situation




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

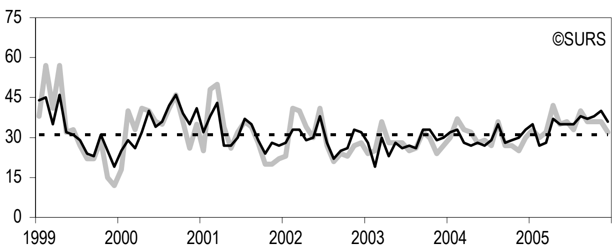



**Raven prodaje**[1)] / Level of sales[1)]

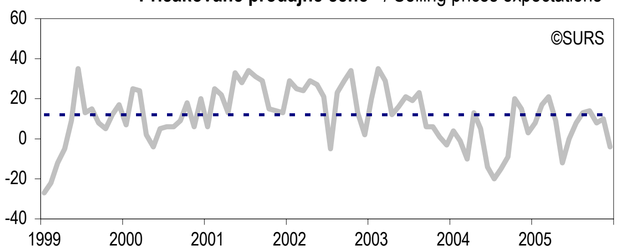



### Pričakovanja v naslednjih 3 mesecih
Expectations in the next 3 months

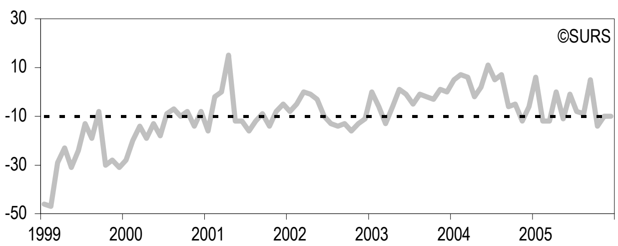
**Pričakovani poslovni položaj** / Expected business situation



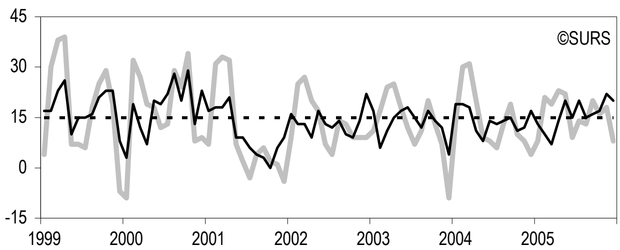

**Pričakovane prodajne cene**[1)] / Selling prices expectations[1)]



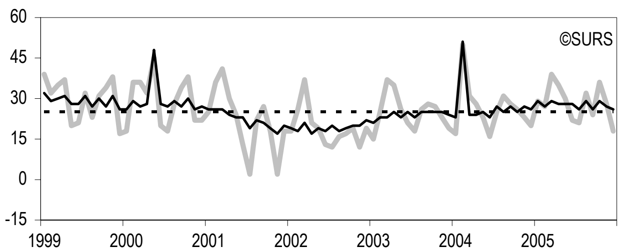

**Pričakovano zaposlovanje**[1)] / Expected employment[1)]




**Pričakovana skupna nabava** / Expected orders



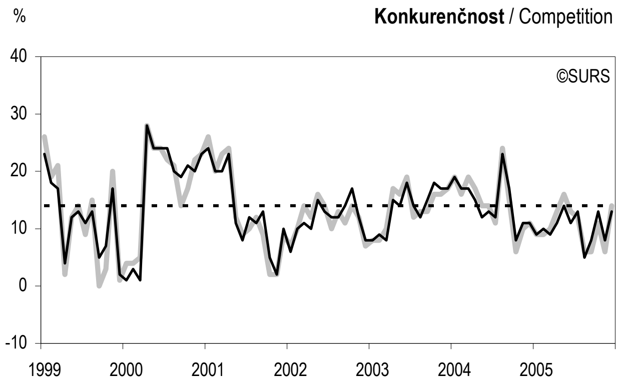

**Pričakovano povpraševanje** / Expected demand

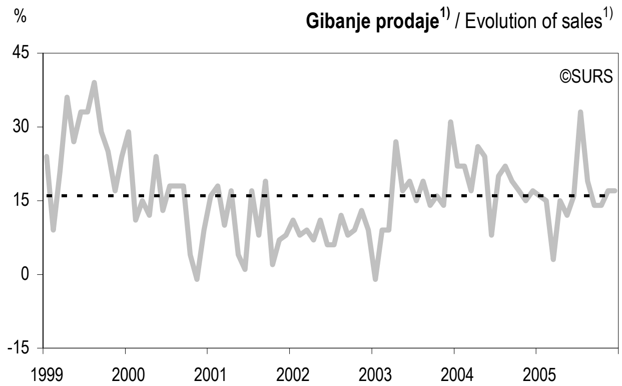



| | | |
|---|---|---|
| originalni podatki<br>raw data | desezonirani podatki<br>seasonally adjusted data | dolgoletno povprečje<br>long-term average |

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

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

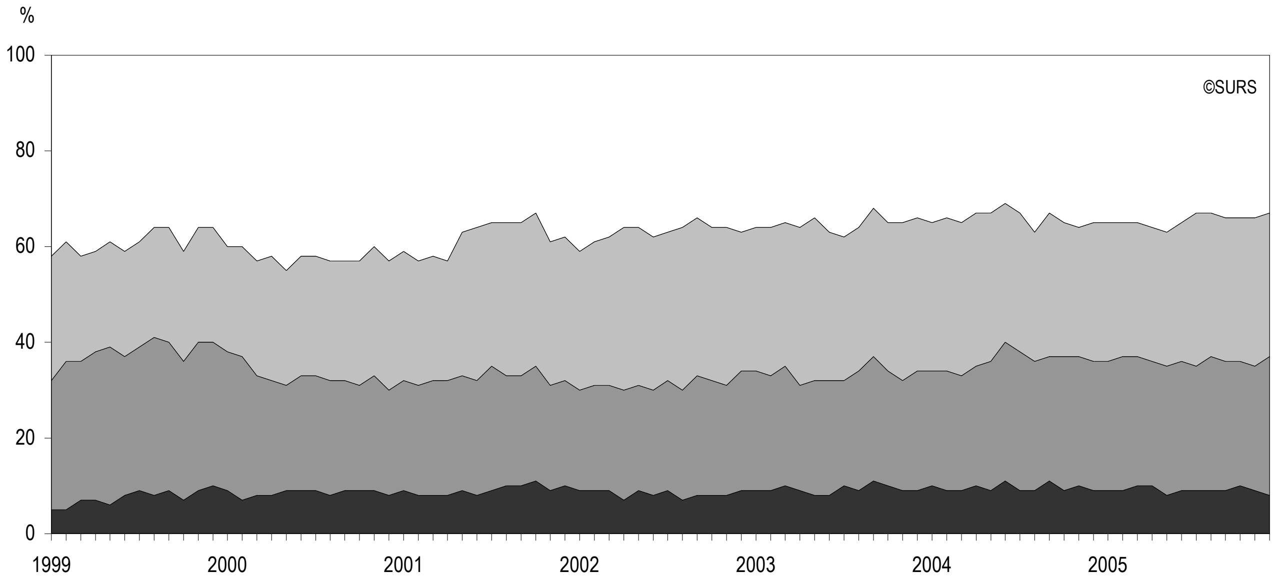



| | | |
|---|---|---|
| originalni podatki<br>raw data | desezonirani podatki<br>seasonally adjusted data | dolgoletno povprečje<br>long-term average |

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".

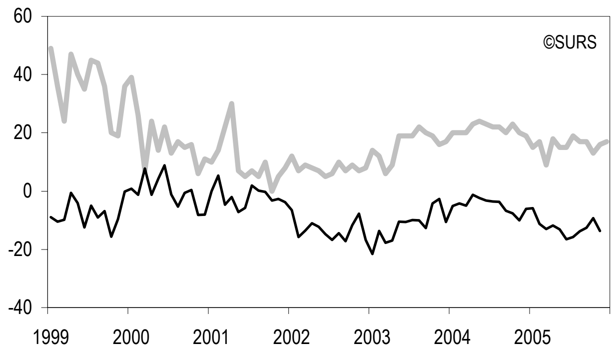
**The chart on retail trade obstacles shows the share of enterprises faced with the following groups of problems:**

- 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.

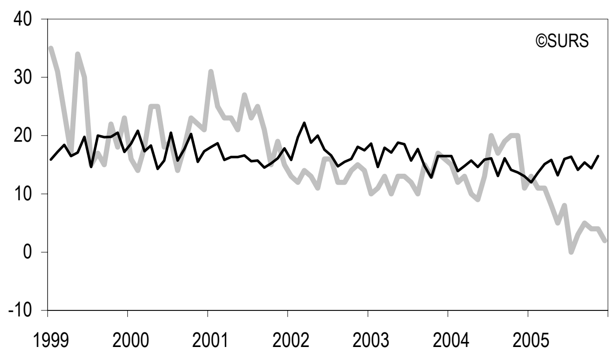
## 3. GIBANJE EKONOMSKIH KAZALNIKOV V TRGOVINI NA DROBNO V SLOVENIJI IN EU[1)], JANUAR 1999 – DECEMBER 2005
EVOLUTION OF ECONOMIC INDICATORS IN RETAIL TRADE IN SLOVENIA AND EU[1)], JANUARY 1999 - DECEMBER 2005

### Ocena stanj
Appreciation of situation

**Poslovni položaj** / Business situation

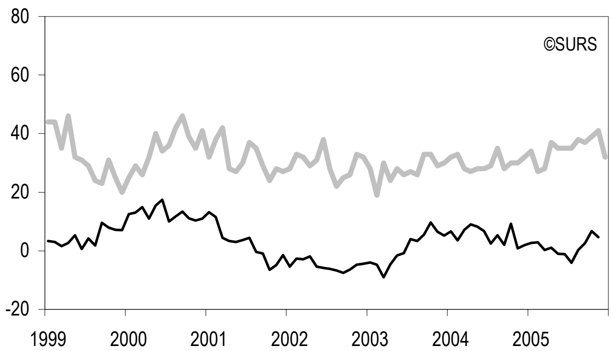



**Obseg zalog** / Volume of stocks

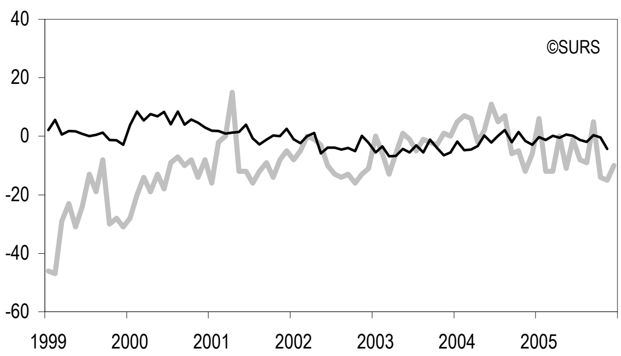



### Pričakovanja v naslednjih 3 mesecih
Expectations in the next 3 months

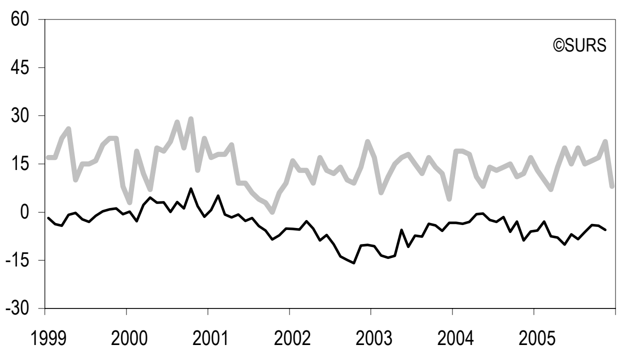
**Pričakovani poslovni položaj** / Expected business situation




**Pričakovano zaposlovanje** / Expected employment




**Pričakovana skupna nabava** / Expected orders




| desezonirani podatki - Slovenija | desezonirani podatki - EU |
|---|---|
| seasonally adjusted data - Slovenia | 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 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 (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?
- 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 2 odstotni točki nižja od preteklega meseca. V primerjavi z lanskim decembrom in tudi lanskim povprečjem pa je vrednost zrasla za 3 oz. 5 odstotnih točk.**

**OCENA STANJ**

**POSLOVNI POLOŽAJ**

Vrednost kazalnika poslovni položaj se je v primerjavi s preteklim mesecem zvišala za 1 odstotno točko. Glede na isti mesec lani je bila nižja za 2 odstotni točki in 4 odstotne točke pod lanskim povprečjem.

**PRODAJNE CENE**

Vrednost kazalnika prodajne cene je bila v primerjavi s preteklim mesecem nižja za 14 odstotnih točk. V primerjavi z istim mesecem lani je bila vrednost kazalnika višja za 1 odstotno točko in 10 odstotnih točk pod povprečjem lanskega leta.

**FINANČNI POLOŽAJ**

Desezonirana vrednost kazalnika finančni položaj je bila v primerjavi s preteklim mesecem enaka. V primerjavi z istim mesecem lani je bila vrednost višja za 3 odstotne točke in enaka lanskemu povprečju.

**OBSEG ZALOG**

Kazalnik obsega zalog je v primerjavi s preteklim mesecem nižji za 2 odstotni točki. V primerjavi z istim mesecem lani je bil nižji za 9 odstotnih točk in 13 odstotnih točk pod povprečjem lanskega leta.

**RAVEN PRODAJE**

Vrednost kazalnika raven prodaje je v primerjavi s preteklim mesecem zrasla za 10 odstotnih točk. V primerjavi z istim mesecem lani je bila nižja za 7 odstotnih točk in za 11 odstotnih točk pod lanskim povprečjem.

**PRIČAKOVANJA**

**PRIČAKOVANI POSLOVNI POLOŽAJ**

Desezonirana vrednost kazalnika pričakovani poslovni položaj je v primerjavi s preteklim mesecem padla za 4 odstotne točke. V primerjavi z istim mesecem lani in lanskim povprečjem je bila višja za 2 odstotni točki oz. 6 odstotnih točk.

**PRIČAKOVANE PRODAJNE CENE**

Vrednost kazalnika pričakovane prodajne cene se je v primerjavi s preteklim mesecem znižala za 14 odstotnih točk. V primerjavi z istim mesecem lani je bila nižja za 7 odstotnih točk in 3 odstotne točke pod lanskim povprečjem.

**PRIČAKOVANO ZAPOSLOVANJE**

Vrednost kazalnika pričakovano zaposlovanje je v primerjavi s preteklim mesecem enaka. V primerjavi z istim mesecem lani je bila nižja za 4 odstotne točke in 11 odstotnih točk pod lanskim povprečjem.

**PRIČAKOVANA SKUPNA NABAVA**

Desezonirana vrednost kazalnika pričakovana skupna nabava je bila za 2 odstotni točki nižja kot pretekli mesec. V primerjavi z istim mesecem lani je bila višja za 4 odstotne točke in za 6 odstotnih točk nad povprečjem lanskega leta.

**PRIČAKOVANO POVPRAŠEVANJE**

V primerjavi s preteklim mesecem se je desezonirana vrednost znižala za 1 odstotno točko. V primerjavi z istim mesecem lani je bila za 2 odstotni točki nižja

**COMMENT**

**The seasonally adjusted retail trade confidence indicator decreased by 2 percentage points in comparison with the previous month. Compared to December 2004 and last year's average it was up by 3 and 5 percentage points.**

**APPRECIATION OF SITUATION**

**BUSINESS SITUATION**

The business situation indicator was up by 1 percentage point. Compared to December 2004 it was down by 2 percentage points and compared to last year's average by 4 percentage points.

**SELLING PRICES**

The indicator of the selling prices went down by 14 percentage points compared to November 2005. In comparison with December 2004 the value of the indicator went up by 1 percentage point and was 10 percentage points below last year's average.

**FINANCIAL SITUATION**

The seasonally adjusted indicator of the financial situation remained the same as in November 2005. Compared to December 2004 it was up by 3 percentage points and equal to last year's average.

**VOLUME OF STOCKS**

The volume of stocks indicator went down by 2 percentage points. Compared to December 2004 and last year's average it went down by 9 and 13 percentage points.

**LEVEL OF SALES**

In comparison with November 2005 the indicator of the level of sales went up by 10 percentage points. Compared to December 2004 and last year's average it was down by 7 and 11 percentage points.

**EXPECTATIONS**

**EXPECTED BUSINESS SITUATION**

The seasonally adjusted indicator of the expected business situation decreased by 4 percentage points compared to November 2005. In comparison with December 2004 and last year's average it was up by 2 and 6 percentage points.

**SELLING PRICES EXPECTATIONS**

Selling prices expectations indicator was down by 14 percentage points compared to the previous month. In comparison to December 2004 it went down by 7 percentage points and was 3 percentage points below last year's average.

**EXPECTED EMPLOYMENT**

The indicator of the expected employment remained the same as in November 2005. Compared to December 2004 it decreased by 4 percentage points and was 11 percentage points below last year's average.

**EXPECTED ORDERS**

The seasonally adjusted indicator of the expected orders fell by 2 percentage points compared to November 2005. The indicator went up by 4 percentage points when compared to December 2004 and by 6 percentage points when compared to last year's average.

**EXPECTED DEMAND**

The seasonally adjusted indicator of the expected demand decreased by 1 percentage point compared to the previous month. It was down by 2 in 1 odstotno točko pod lanskim povprečjem.

### 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 3 odstotne točke in 2 odstotni točki pod lanskim povprečjem.

### GIBANJE PRODAJE ZA TO OBDOBJE LETA

Vrednost kazalnika gibanje prodaje je za to obdobje leta v primerjavi s preteklim mesecem enaka. V primerjavi z istim mesecem lanskega leta je bila vrednost tega kazalnika enaka in 2 odstotni točki pod lanskim povprečjem.

### 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 je bil v primerjavi s preteklim mesecem za 1 odstotno točko nižji in za 2 odstotni točki nižji kot v decembru 2004.

Podjetij, ki so se srečevala s skupino dejavnikov *težave s ponudbo,* je bilo 30 % (oz. 24 % prihodka), to je 1 odstotno točko manj kot v preteklem mesecu in 1 odstotno točko več kot v decembru lani.

Podjetij, ki so se srečevala s skupino dejavnikov *težave s povpraševanjem,* je bilo 29 % (oz. 34 % prihodka), kar je bilo za 3 odstotne točke več kot v preteklem mesecu in za 2 odstotni točki več kot v decembru 2004.

Podjetij, ki pri svojem poslovanju *niso imela omejitev*, je bilo 8 % (oz. 17 % prihodka) oziroma za 1 odstotno točko manj kot v preteklem mesecu in decembra lani.

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

- 48 % podjetij (ali 53 % prihodka) je omejevala konkurenca v sektorju,
- 40 % podjetij (ali 36 % prihodka) so omejevali visoki stroški dela,
- 30 % podjetij (ali 23 % prihodka) je omejevalo nezadostno povpraševanje,
- 23 % 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.,
- 10 % podjetij (ali 4 % prihodka) je omejevala dostopnost do bančnih posojil,
- 9 % podjetij (ali 17 % prihodka) ni imelo omejitev v poslovanju,
- 7 % podjetij (ali 4 % prihodka) so omejevali premajhni skladiščni prostori,
- 3 % podjetij (ali 1 % prihodka) je omejevala slaba ponudba.

percentage points compared to December 2004 and 1 percentage point below last year's average.

### COMPETITION

In comparison with the previous month, the seasonally adjusted indicator of the competition increased by 5 percentage points. Compared to December 2004 it was up by 3 percentage points and was 2 percentage points below last year's average.

### EVOLUTION OF SALES FOR THIS PERIOD OF YEAR

The value of the evolution of sales indicator remained the same as in November 2005. Compared to December 2004 it remained the same and was 2 percentage points below last year's average.

### OBSTACLES IN RETAIL TRADE

33% of enterprises in retail trade (25% of turnover) were faced with *"severe obstacles"* in trading. Compared to the previous month the share was down by 1 percentage point and 2 percentage points lower than in December 2004.

The share of enterprises faced with *"supply difficulties"* was 30% (24% of turnover). This share was 1 percentage point lower than in November 2005 and 1 percentage point higher than in December 2004.

The share of enterprises faced with *"demand difficulties"* was 29% (34% of turnover), which was 3 percentage points higher than in the previous month and 2 percentage points higher than in December 2004.

Only 8% of enterprises (17% of turnover) experienced *no obstacles.* The share of these enterprises was 1 percentage point lower than in the previous month and in December 2004.

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

- 48% of enterprises (or 53% of turnover) were limited by competition in their own sector,
- 40% of enterprises (or 36% of turnover) were limited by high cost of labour,
- 30% of enterprises (or 23% of turnover) were limited by insufficient demand,
- 23% 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% of enterprises (or 4% of turnover) were limited in their access to bank credits,
- 9% of enterprises (or 17% of turnover) experienced no obstacles,
- 7% of enterprises (or 4% of turnover) were limited by small storage capacity,
- 3% of enterprises (or 1% of turnover) were limited by supply shortage.

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%.

*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.*

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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 Brigita Vrabič Kek - Slovensko besedilo jezikovno uredila Joža Lakovič - Angleško besedilo jezikovno uredil Boris Panič - Naklada 90 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 Brigita Vrabič Kek - Slovene language editor Joža Lakovič - English language editor Boris Panič - Total print run 90 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.