STATISTIČNI URAD REPUBLIKE SLOVENIJE
STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA

STATISTIČNE INFORMACIJE
RAPID REPORTS

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29. JULIJ 2004
29 JULY 2004

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

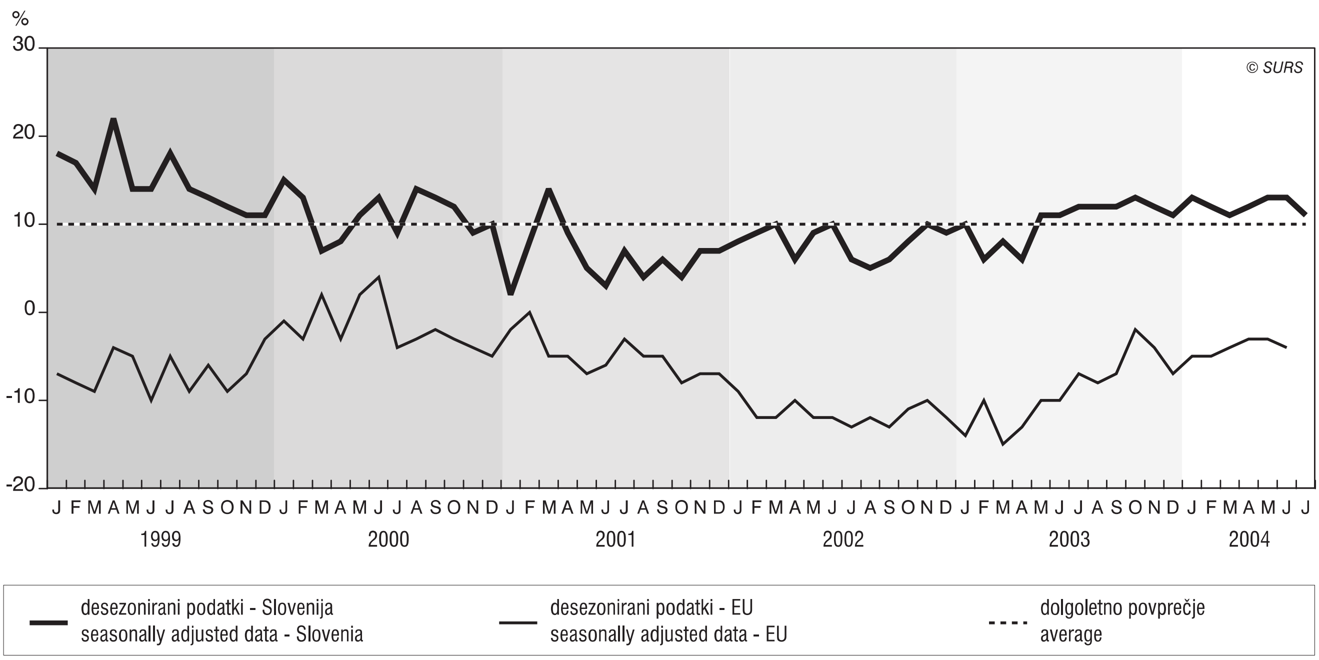
št./No 25

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

- V juliju so se tendence v trgovini na drobno v primerjavi s preteklim mesecem poslabšale za 2 odstotni točki. Tudi v primerjavi z lanskim julijem je bila vrednost kazalca zaupanja nižja, in sicer za 1 odstotno točko. V primerjavi z lanskim povprečjem pa se je vrednost tega kazalca izboljšala, in sicer za 1 odstotno točko.
- Na gibanje kazalca zaupanja sta vplivali predvsem ocena sedanjega in ocena pričakovanega poslovnega položaja.
- Kazalci stanj so se večinoma izboljšali; izjema sta bila kazalca poslovni položaj in prodajne cene. Ravno tako so se večinoma izboljšali tudi kazalci pričakovanj, izjema je bil le kazalec pričakovane prodajne cene.

- In July business tendencies in retail trade went down by 2 percentage points compared to June 2004. The confidence indicator was 1 percentage point lower than in July 2003 but 1 percentage point higher than last year's average.
- The confidence indicator was mostly influenced by the present and expected business situation.
- Indicators of the present situation mainly improved, except the indicators of the present business situation and selling prices. Indicators of the expected business situation also improved, except the indicator of expected selling prices.

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



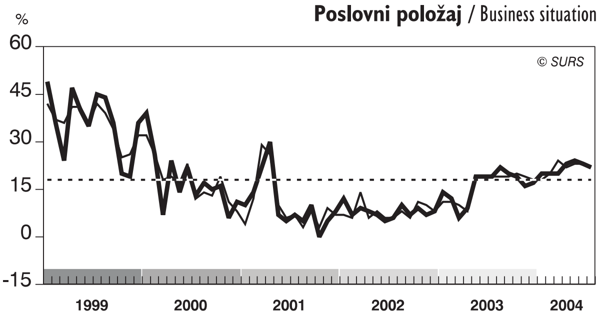
[1] Kazalec zaupanja je povprečje ravnotežij na vprašanja o sedanjem in pričakovanem poslovnem položaju ter sedanjem obsegu zalog (obrnjen predznak).
The confidence indicator is an average of responses (balances) to questions on present and expected business situation and present stock (the latter with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

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

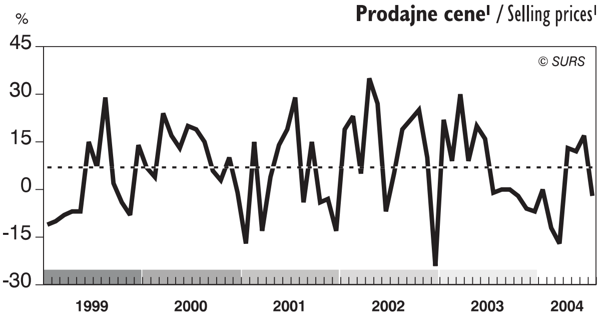
2. EVOLUTION OF ECONOMIC INDICATORS IN RETAIL TRADE IN SLOVENIA, JANUARY 1999 - JULY 2004

Ocena stanj / Appreciation of situation

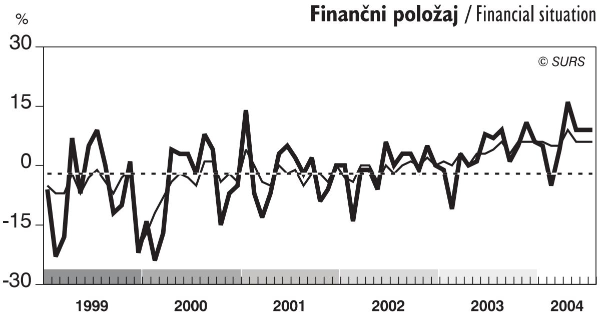
Poslovni položaj / Business situation



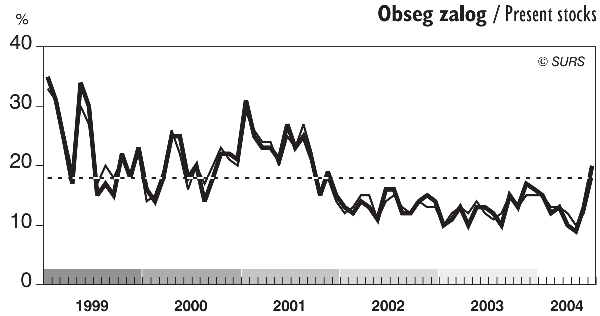
Prodajne cene[1] / Selling prices[1]



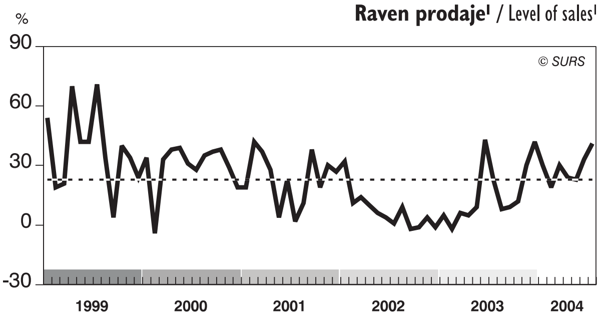
Finančni položaj / Financial situation



Obseg zalog / Present stocks

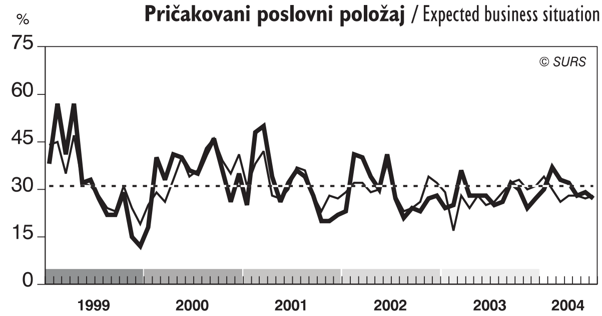


Raven prodaje[1] / Level of sales[1]

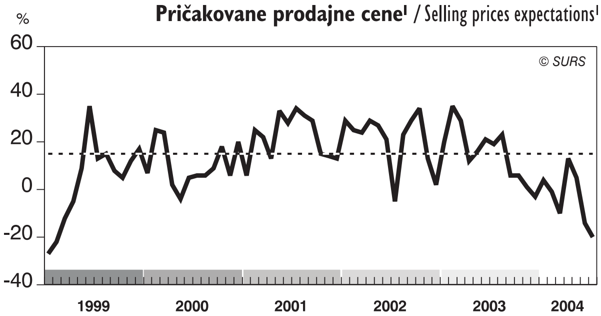


Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months

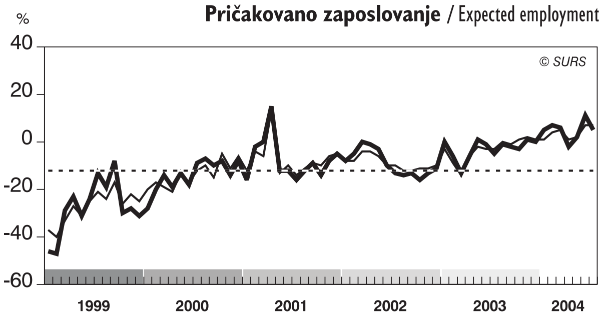
Pričakovani poslovni položaj / Expected business situation



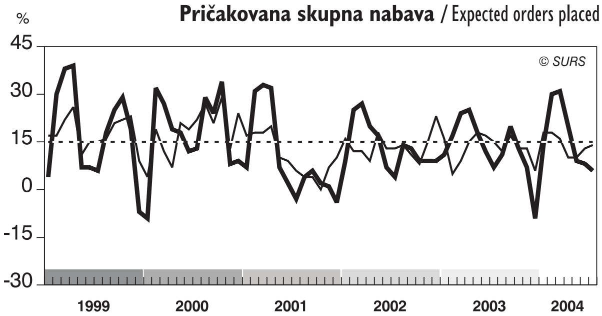
Pričakovane prodajne cene[1] / Selling prices expectations[1]



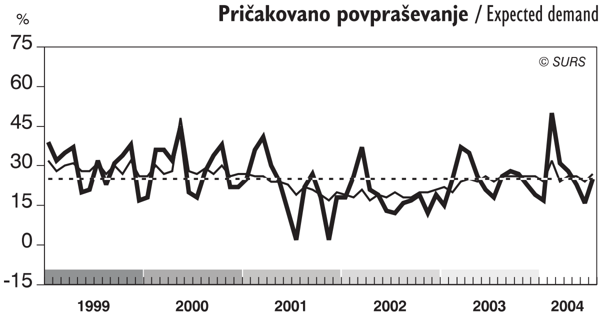
Pričakovano zaposlovanje / Expected employment



Pričakovana skupna nabava / Expected orders placed



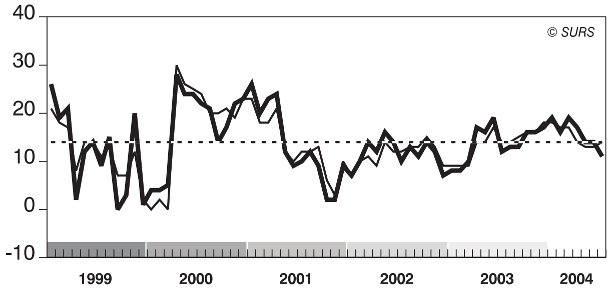
Pričakovano povpraševanje / Expected demand

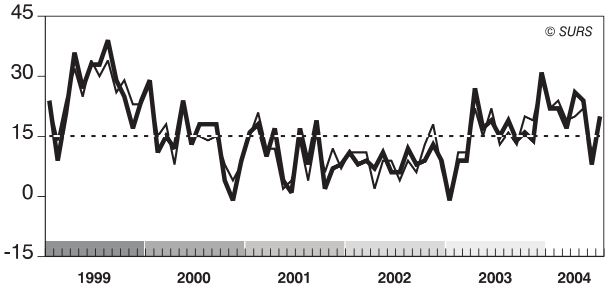


originalni podatki / raw data —— desezonirani podatki / seasonally adjusted data - - - - dolgoletno povprečje / average

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

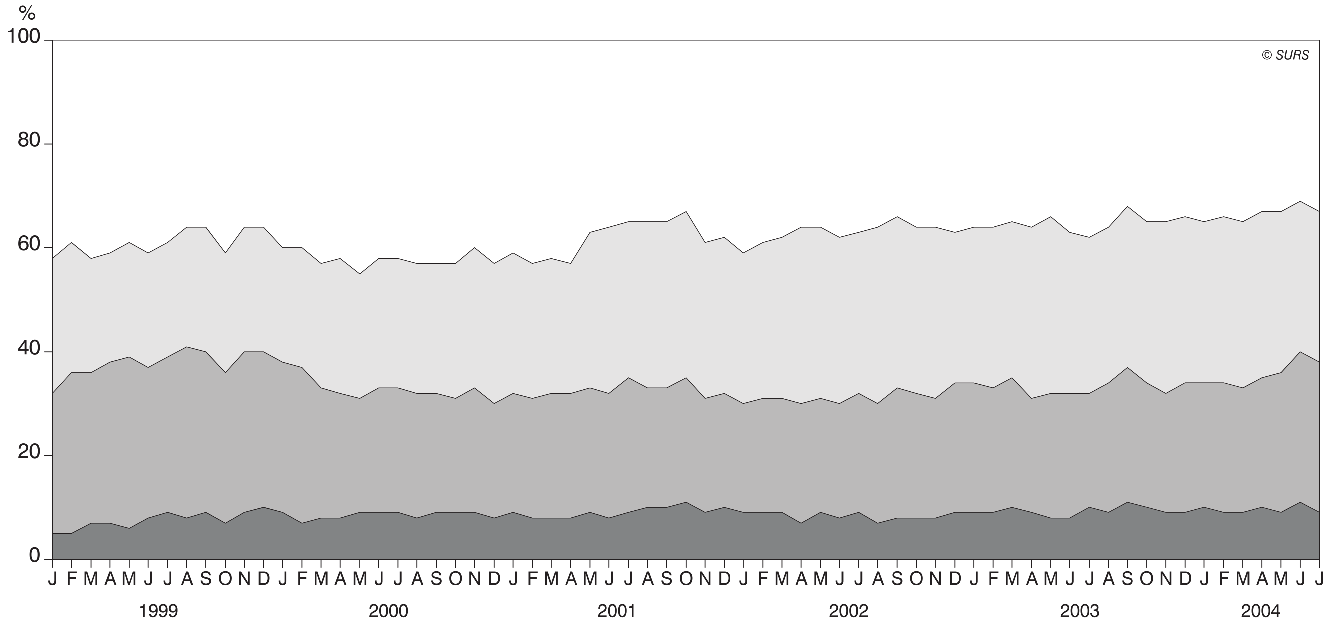
Ocena konkurenčnosti in gibanje prodaje
Appreciation of competition and evolution of sales





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

Omejitveni dejavniki v trgovini na drobno
Obstacles in retail trade



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

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

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

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

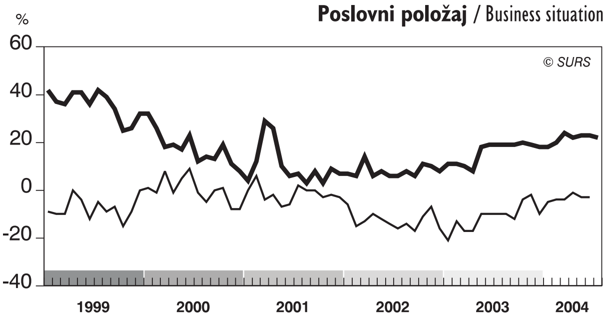
hude omejitve / severe obstacles | težave s ponudbo / supply difficulties | težave s povpraševanjem / demand difficulties | ni omejitev / no limits

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

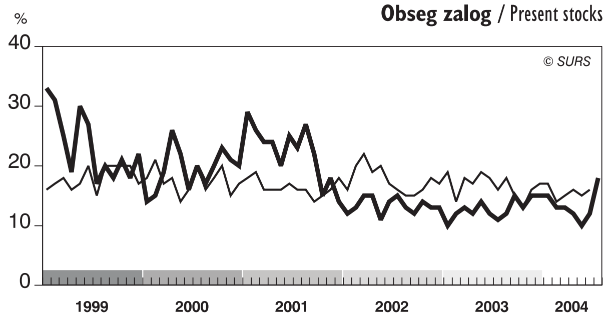
3. EVOLUTION OF ECONOMIC INDICATORS IN RETAIL TRADE IN SLOVENIA AND EU[1], JANUARY 1999 - JULY 2004

Ocena stanj / Appreciation of situation

Poslovni položaj / Business situation

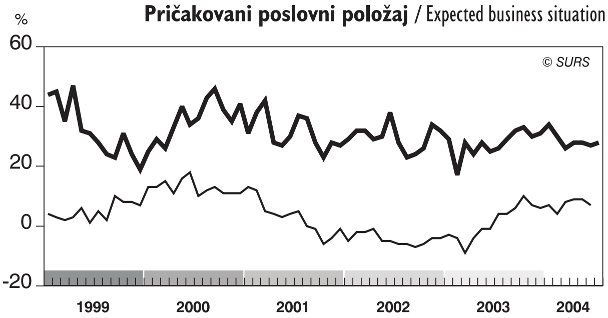


Obseg zalog / Present stocks

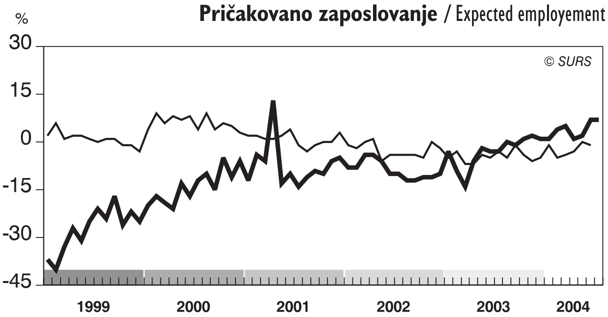


Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months

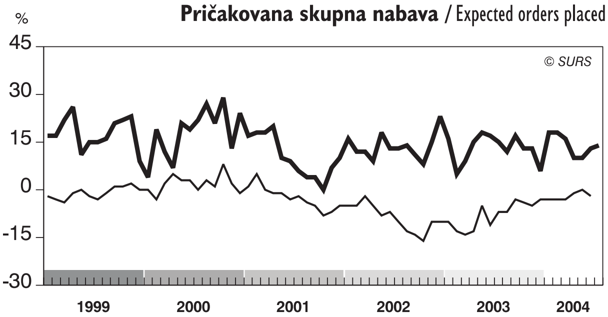
Pričakovani poslovni položaj / Expected business situation



Pričakovano zaposlovanje / Expected employement



Pričakovana skupna nabava / Expected orders placed



Slovenija / Slovenia — EU / EU

[1] Vir podatkov je Evropska komisija. Podatki o EU za zadnji mesec nam niso na voljo. Podatki so desezonirani.
Source for EU data is European Commission. 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.

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

ENOTA OPAZOVANJA

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

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

Vzorec podjetij je oblikovan na podlagi dveh meril:

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

VIRI

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

ZAJETJE

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

NAČIN ZBIRANJA PODATKOV

Anketo izvajamo mesečno po pošti.

UTEŽEVANJE ODGOVOROV

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

NEODGOVORI

Neodgovore vsak mesec obdelamo skladno s poenoteno metodologijo.

DEFINICIJE IN POJASNILA

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

METHODOLOGICAL EXPLANATIONS

PURPOSE OF THE STATISTICAL SURVEY

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

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

OBSERVATION UNITS

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

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

They were selected into the panel by two criteria:

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

SOURCES

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

COVERAGE

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

METHOD OF DATA COLLECTING

The survey is carried out monthly by mail.

WEIGHTS FOR RESPONSES

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

NON-RESPONSES

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

DEFINITIONS AND EXPLANATIONS

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

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

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

OBJAVLJANJE REZULTATOV

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

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

VPRAŠANJA :

⇨ Ocene stanj:

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

⇨ Pričakovanja v naslednjih mesecih:

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

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

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

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

PUBLISHING

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

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

QUESTIONS:

⇨ Appreciation of situation:

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

⇨ Expectation in the next months:

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

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

KOMENTAR

V juliju 2004 so se tendence v trgovini na drobno v primerjavi s preteklim mesecem poslabšale za 2 odstotni točki. Tudi v primerjavi z lanskim julijem je bila vrednost kazalca zaupanja nižja, in sicer za 1 odstotno točko. V primerjavi z lanskim povprečjem pa se je vrednost tega kazalca izboljšala, in sicer za 1 odstotno točko.

Na gibanje kazalca zaupanja sta vplivali predvsem ocena sedanjega in ocena pričakovanega poslovnega položaja.

Kazalci stanj so se večinoma izboljšali; izjema sta bila kazalca poslovni položaj in prodajne cene. Ravno tako so se večinoma izboljšali tudi kazalci pričakovanj, izjema je bil le kazalec pričakovane prodajne cene.

PRIČAKOVANJA

PRIČAKOVANI POSLOVNI POLOŽAJ

Desezonirana vrednost kazalca pričakovanega poslovnega položaja v letošnjem juliju je bila v primerjavi s preteklim mesecem za 1 odstotno točko višja. Glede na vrednost v lanskem juliju je bila za 2 odstotni točki višja, hkrati pa enaka lanskemu povprečju.

PRIČAKOVANE PRODAJNE CENE

Desezonirana vrednost kazalca pričakovanih prodajnih cen je bila za 6 odstotnih točk nižja kot v preteklem mesecu. Glede na isti mesec lani je bila njegova vrednost za 39 odstotnih točk nižja, za 35 odstotnih točk pa je zaostala za lanskim povprečjem.

PRIČAKOVANO ZAPOSLOVANJE

Desezonirana vrednost kazalca pričakovanega zaposlovanja je bila enaka kot prejšnji mesec. Hkrati je bila za 10 odstotnih točk višja kot v istem mesecu lani in prav tako za 10 odstotnih točk višja od lanskega povprečja.

PRIČAKOVANA SKUPNA NABAVA

Desezonirana vrednost kazalca pričakovane skupne nabave je bila za 1 odstotno točko višja kot v preteklem mesecu in hkrati za 1 odstotno točko nižja kot v istem mesecu lani. Lansko povprečje pa je presegla za 1 odstotno točko.

PRIČAKOVANO POVPRAŠEVANJE

Desezonirana vrednost kazalca pričakovanega povpraševanja je bila za 3 odstotne točke višja kot v preteklem mesecu, za 7 odstotnih točk višja kot v istem mesecu lanskega leta in za 3 odstotne točke višja od lanskega povprečja.

STANJA

POSLOVNI POLOŽAJ

V letošnjem juliju je bila desezonirana vrednost kazalca poslovnega položaja za 1 odstotno točko nižja kot v letošnjem juniju. Hkrati pa je bila vrednost kazalca za 3 odstotne točke višja kot v istem mesecu lanskega leta in za 6 odstotnih točk višja od lanskega povprečja.

COMMENT

In July 2004 business tendencies in retail trade went down by 2 percentage points compared to June 2004. The confidence indicator was 1 percentage point lower than in July 2003 but 1 percentage point higher than last year's average.

The evolution of confidence indicator was mostly influenced by the present and expected business situation.

Indicators of the present situation mainly improved, except the indicators of the present business situation and selling prices. Indicators of the expected business situation also improved, except the indicator of expected selling prices.

EXPECTATIONS

EXPECTED BUSINESS SITUATION

The seasonally adjusted value of the expected business situation indicator rose by 1 percentage point compared to the previous month. Compared to July 2003 it was up by 2 percentage points, while compared to last year’s average it remained the same.

SELLING PRICES EXPECTATIONS

The seasonally adjusted value of the selling prices expectations indicator fell by 6 percentage points compared to the previous month. Compared to July 2003 it was down by 39 percentage points and compared to last year’s average by 35 percentage points.

EXPECTED EMPLOYMENT

The seasonally adjusted value of the expected employment indicator remained the same as in the previous month. Compared to July 2003 and to last year’s average it was up by 10 percentage points.

EXPECTED ORDERS

The seasonally adjusted value of the expected orders indicator rose by 1 percentage point compared to the previous month. Compared to July 2003 it was down by 1 percentage point while compared to last year’s average it was up by 1 percentage point.

EXPECTED DEMAND

The seasonally adjusted value of the expected demand indicator rose by 3 percentage points compared to the previous month. Compared to July 2003 it was up by 7 percentage points and compared to last year’s average by 3 percentage points.

SITUATION

BUSINESS SITUATION

The seasonally adjusted value of the business situation indicator fell by 1 percentage point compared to the previous month. Compared to July 2003 it was up by 3 percentage points and compared to last year’s average by 6 percentage points.

PRODAJNE CENE

Desezonirana vrednost kazalca prodajnih cen je bila nižja v vseh treh primerjavah: v primerjavi s preteklim mesecem za 19 odstotnih točk, glede na isti mesec lanskega leta za 1 odstotno točko in glede na lansko povprečje za 10 odstotnih točk.

FINANČNI POLOŽAJ

Desezonirana vrednost kazalca finančnega položaja se v primerjavi s preteklim mesecem ni spremenila. V primerjavi z istim mesecem lanskega leta je bila za 2 odstotni točki višja in za 3 odstotne točke višja od lanskega povprečja.

OBSEG ZALOG

V primerjavi z junijem letos je bila desezonirana vrednost kazalca obsega zalog julija za 6 odstotnih točk višja. Za 8 odstotnih točk je bila višja kot v istem mesecu lanskega leta in za 5 odstotnih točk višja od lanskega povprečja.

RAVEN PRODAJE

Desezonirana vrednost kazalca ravni prodaje je bila v primerjavi s preteklim mesecem višja za 8 odstotnih točk. Glede na isti mesec lanskega leta je bila višja za 18 odstotnih točk in glede na lansko povprečje višja za 25 odstotnih točk.

KONKURENČNOST

Desezonirana vrednost kazalca konkurenčnosti je bila v primerjavi s preteklim mesecem za 1 odstotno točko višja. Hkrati je bila vrednost kazalca za 1 odstotno točko nižja kot v istem mesecu lanskega leta in enaka lanskemu povprečju.

GIBANJE PRODAJE ZA TO OBDOBJE LETA

Desezonirana vrednost kazalca gibanja prodaje je bila višja v primerjavi s preteklim mesecem za 7 odstotnih točk, glede na isti mesec lanskega leta za 5 odstotnih točk in za 2 odstotni točki od lanskega povprečja.

OMEJITVENI DEJAVNIKI V TRGOVINI NA DROBNO

V trgovini na drobno se je 33 % podjetij (oz. 24 % prihodka) srečevalo z dejavniki iz skupine "hude omejitve". V primerjavi s preteklim mesecem je bil ta delež za 2 odstotni točki višji, glede na isti mesec lanskega leta pa je za 5 odstotnih točk nižji.

Podjetij, ki se srečujejo s skupino dejavnikov "težave s ponudbo", je bilo 29 % (oz. 26 % prihodka). Delež teh podjetij je bil glede na pretekli mesec enak, glede na isti mesec lanskega leta pa za 1 odstotno točko nižji.

Podjetij, ki so se srečevala s skupino dejavnikov "težave s povpraševanjem", je bilo 29 % (oz. 34 % prihodka) oz. prav toliko kot v preteklem mesecu in za 7 odstotnih točk več kot v lanskem juliju.

Podjetij, ki v poslovanju niso imela omejitev, je bilo 9 % (oz. 16 % prihodka). Delež teh podjetij je bil glede na pretekli mesec za 2 odstotni točki nižji, glede na lanski julij pa za 1 odstotno točko nižji.

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

- 46 % podjetij (ali 47 % prihodka) je omejevala konkurenca v sektorju;

SELLING PRICES

The seasonally adjusted value of the selling prices indicator fell by 19 percentage points compared to the previous month. Compared to July 2003 it was down by 1 percentage point and compared to last year's average by 10 percentage points.

FINANCIAL SITUATION

The seasonally adjusted value of the financial situation indicator did not change compared to the previous month. Compared to July 2003 it was up by 2 percentage points and compared to last year's average by 3 percentage points.

PRESENT STOCKS

The seasonally adjusted value of the present stocks indicator rose by 6 percentage points compared to the previous month. Compared to July 2003 it was up by 8 percentage points and compared to last year's average by 5 percentage points.

LEVEL OF SALES

The seasonally adjusted value of the level of sales indicator rose by 8 percentage points compared to the previous month. Compared to July 2003 it was up by 18 percentage points and compared to last year's average by 25 percentage points.

COMPETITION

The seasonally adjusted value of the competition indicator rose by 1 percentage point compared to the previous month. Compared to July 2003 it was down by 1 percentage point and the same as last year's average.

EVOLUTION OF SALES FOR THIS PERIOD OF YEAR

The seasonally adjusted value of the evolution of sales indicator rose by 7 percentage points compared to the previous month. Compared to July 2003 it was up by 5 percentage points and compared to last year's average by 2 percentage points.

OBSTACLES IN RETAIL TRADE

In July 2004, 33% of enterprises (24% of turnover) in retail trade were faced with “severe obstacles” in trading. Compared to the previous month the share was up by 2 percentage points while compared to July 2003 it was down by 5 percentage points.

The share of enterprises faced with “supply difficulties” was 29% (26% of turnover), which is the same as in the previous month and 1 percentage point less than in July 2003.

The share of enterprises faced with “demand difficulties” was 29% (34% of turnover), which is the same as in the previous month and 7 percentage points more than in July 2003.

Only 9% of enterprises (16% of turnover) experienced no obstacles. Compared to the previous month the share was down by 2 percentage points and compared to July 2003 by 1 percentage point.

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

- 46% of enterprises (or 47% of turnover) were limited by competition

- 39 % podjetij (ali 34 % prihodka) so omejevali visoki stroški dela;
- 34 % podjetij (ali 26 % prihodka) je omejevalo nezadostno povpraševanje;
- 24 % podjetij (ali 27 % prihodka) je omejevala visoka cena denarja;
- 13 % podjetij (ali 8 % prihodka) je omejevala premajhna prodajna površina;
- 11 % podjetij (ali 7 % prihodka) je omejevala dostopnost do bančnih kreditov;
- 9 % podjetij (ali 16 % prihodka) ni imelo omejitev v poslovanju;
- 8 % podjetij (ali 6 % prihodka) so omejevali drugi dejavniki, kot so finančna nedisciplina, visoke najemnine, slaba lokacija itd.;
- 7 % podjetij (ali 4 % prihodka) so omejevali premajhni skladiščni prostori;
- 3 % podjetij (ali 1 % prihodka) je omejevala slaba ponudba.

in own sector,
- 39% of enterprises (or 34% of turnover) were limited by high cost of labour,
- 34% of enterprises (or 26% of turnover) were limited by demand difficulties,
- 24% of enterprises (or 27% of turnover) were limited by high cost of finance,
- 13% of enterprises (or 8% of turnover) were limited by small sales surface,
- 11% of enterprises (or 7% of turnover) were limited by access to bank credits,
- 9% of enterprises (or 16% of turnover) experienced no obstacles,
- 8% of enterprises (or 6% of turnover) were limited by other factors such as lack of financial discipline, high rents, bad location, etc.,
- 7% of enterprises (or 4% of turnover) were limited by small storage capacity,
- 3% of enterprises (or 1% of turnover) were limited by bad supply.

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

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