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

št./No 11

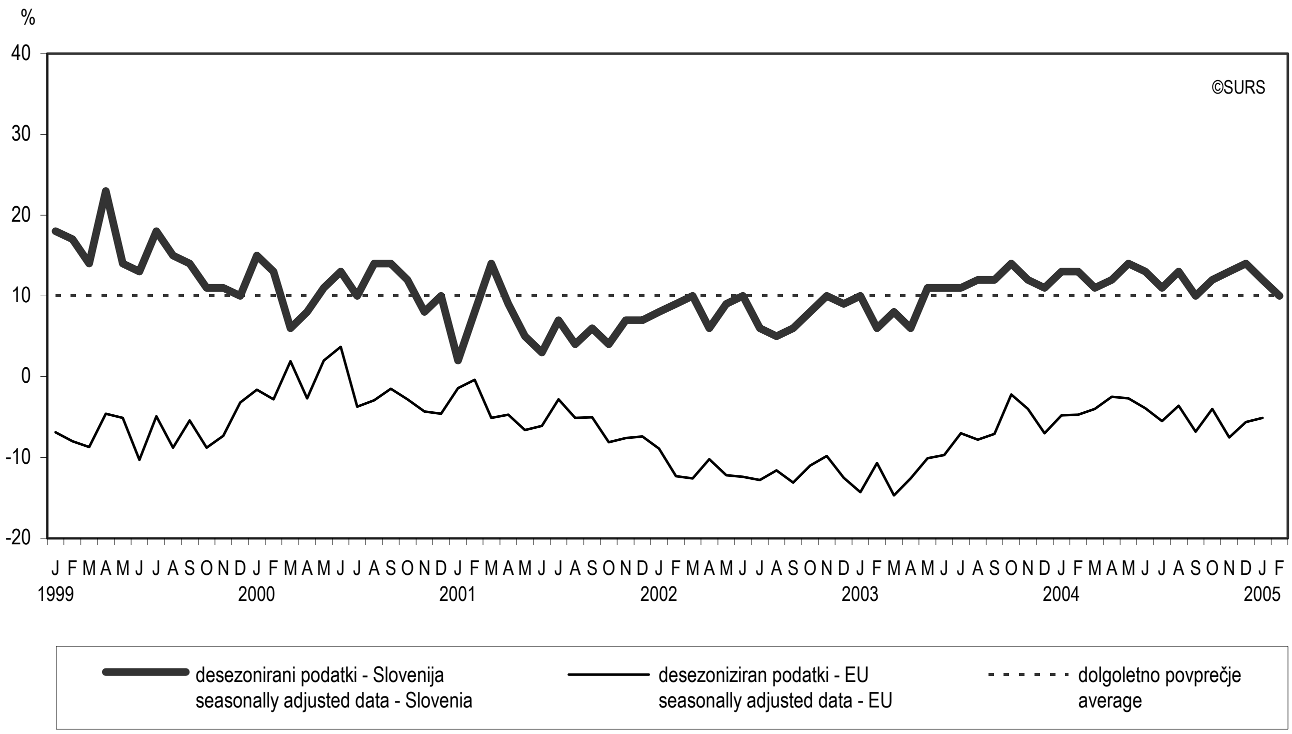
# POSLOVNE TENDENCE V TRGOVINI NA DROBNO, SLOVENIJA, FEBRUAR 2005

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

- ▶ V februarju 2005 je bila desezonirana vrednost kazalca zaupanja v trgovini na drobno glede na pretekli mesec nižja za 2 odstotni točki. Vrednost kazalca je padla tudi v primerjavi z lanskim februarjem in v primerjavi z lanskim povprečjem, in sicer za 3 odstotne točke oziroma 2 odstotni točki.
- ▶ Na padec vrednosti kazalca zaupanja je vplivalo poslabšanje kazalca pričakovani poslovni položaj. Po drugi strani pa sta kazalca sedanji poslovni položaj in obseg zalog pozitivno vplivala na gibanje kazalca zaupanja.
- ▶ Kazalci stanj so se izboljšali. Izjema sta bila kazalca obseg zalog in gibanje prodaje za to obdobje leta. Po drugi strani pa so se vsi kazalci pričakovanj poslabšali, razen kazalca pričakovane prodajne cene.

- ▶ In February 2005 the seasonally adjusted retail trade confidence indicator fell by 2 percentage points compared to the previous month. Its value also went down compared to February 2004 and to last year's average, i.e. by 3 and 2 percentage points, respectively.
- ▶ The drop in the confidence indicator was influenced by the worsening of the indicator of the expected business situation. On the other hand, the indicators of the present business situation and the present stocks positively influenced its development.
- ▶ Situation indicators improved, only the indicators of present stocks and evolution of sales for this period of year worsened. On the other hand, all expectation indicators worsened, except the indicator of selling prices expectations.

**Slika 1: KAZALEC ZAUPANJA1) V SLOVENIJI IN EU2) JANUAR 1999 - FEBRUAR 2005**
Chart 1: CONFIDENCE INDICATOR1) IN SLOVENIA AND EU2) JANUARY 1999 - FEBRUARY 2005



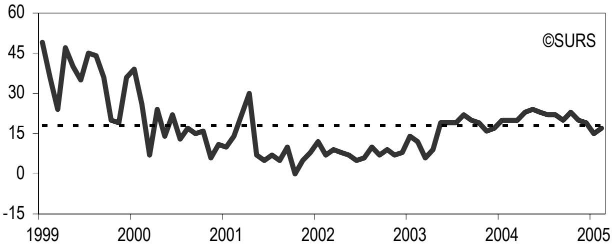

1) Kazalec zaupanja je povprečje ravnotežij na vprašanja o sedanjem in pričakovanem poslovnem položaju ter sedanjem obsegu zalog (obrnjen predznak).
The confidence indicator is an average of responses (balances) to questions on present and expected business trend and present stock (the latter with inverted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

2) Vir podatkov je Evropska komisija. Podatki o EU za zadnji mesec niso na voljo.
Source for EU data is European Commission. Data for EU for the last month are not available.

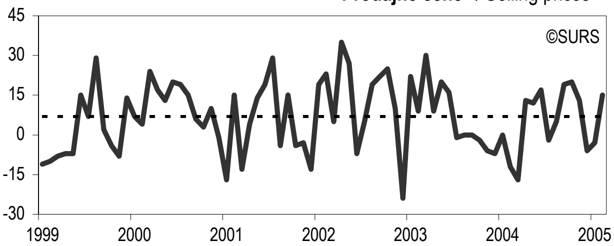
## 2. GIBANJE EKONOMSKIH KAZALCEV V TRGOVINI NA DROBNO V SLOVENIJI, JANUAR 1999 - FEBRUAR 2005
EVOLUTION OF ECONOMIC INDICATORS IN RETAIL TRADE IN SLOVENIA, JANUARY 1999 - FEBRUARY 2005

### Ocena stanj
Appreciation of situation

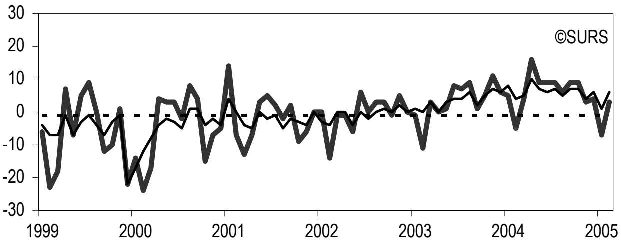
%
**Poslovni položaj**[1)] / Business situation[1)]



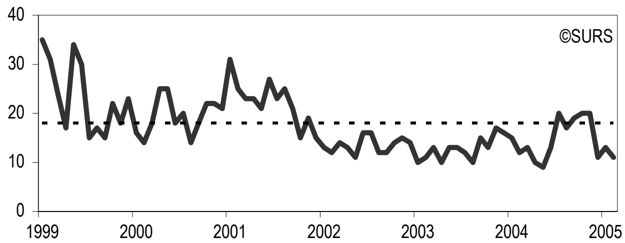

%
**Prodajne cene**[1)] / Selling prices[1)]




%
**Finančni položaj** / Financial situation



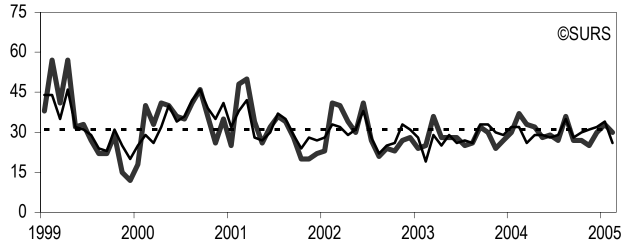

%
**Obseg zalog**[1)] / Present stocks[1)]



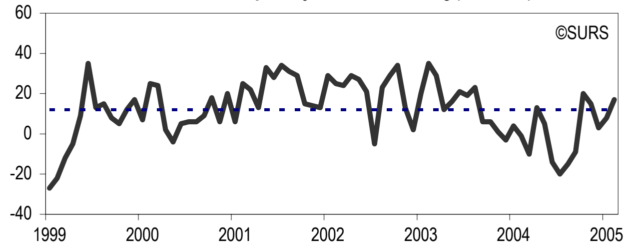

%
**Raven prodaje**[1)] / Level of sales[1)]


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

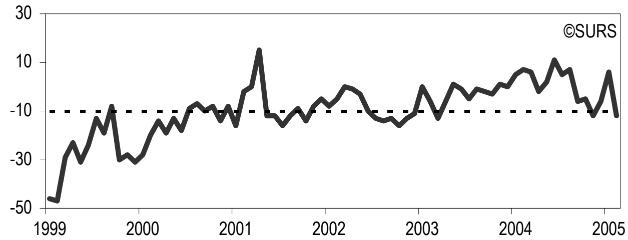
%
**Pričakovani poslovni položaj** / Exected business situation



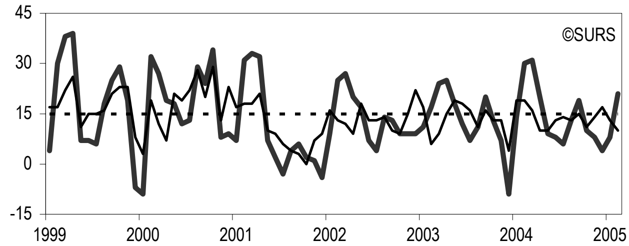

%
**Pričakovane prodajne cene**[1)] / Selling prices expectations[1)]



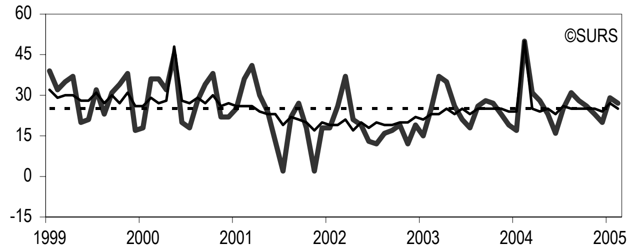

%
**Pričakovano zaposlovanje**[1)] / Expected employment[1)]




%
**Pričakovana skupna nabava** / Expected orders placed



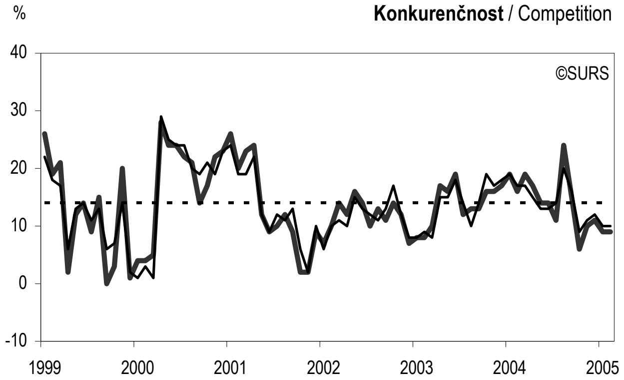

%
**Pričakovano povpraševanje** / Expected demand

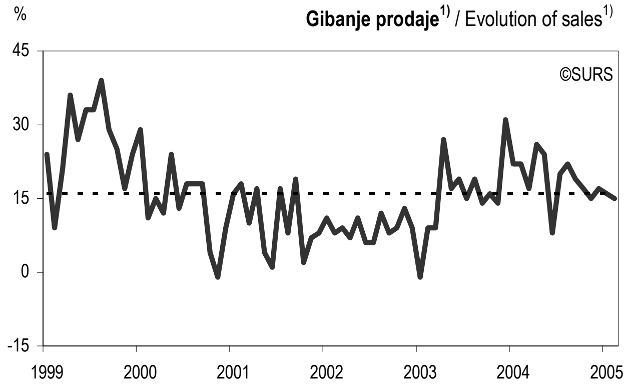



| originalni podatki<br>raw data | desezonirani podatki<br>seasonally adjusted data | dolgoletno povprečje<br>average |
|---|---|---|

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

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

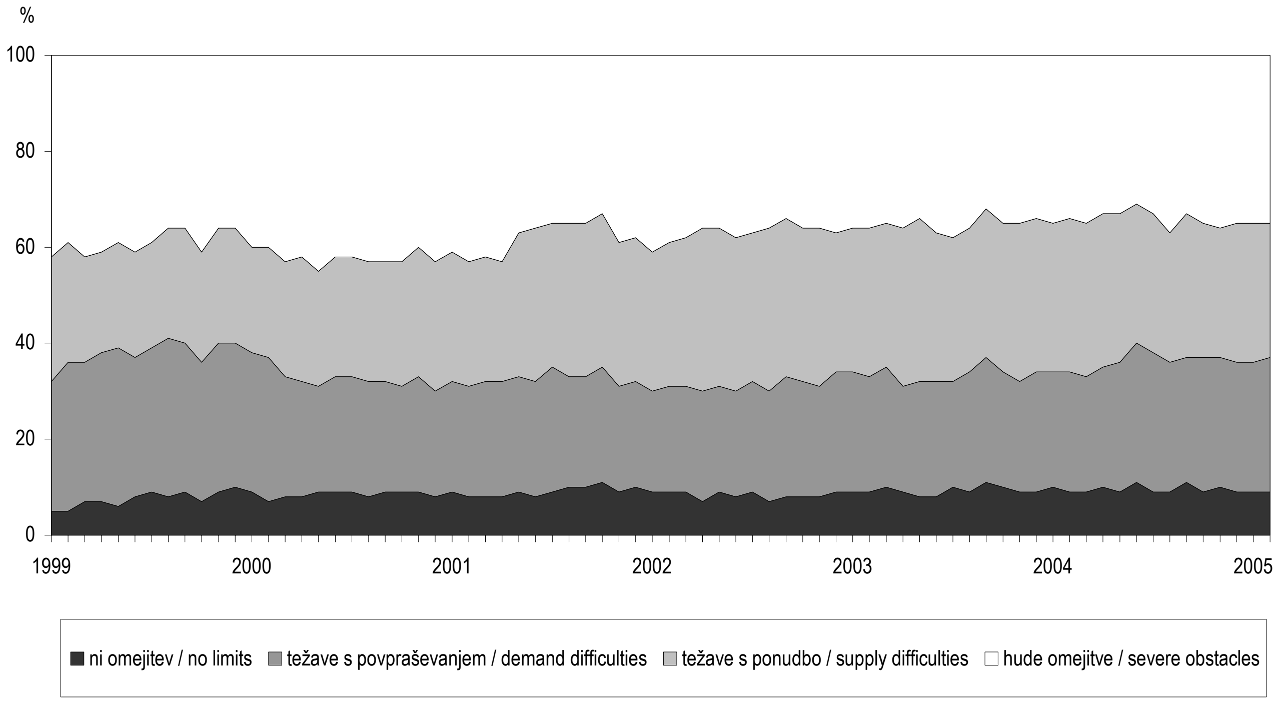



| | | |
|---|---|---|
| originalni podatki<br>raw data | desezonirani podatki<br>seasonally adjusted data | dolgoletno povprečje<br>average |

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".

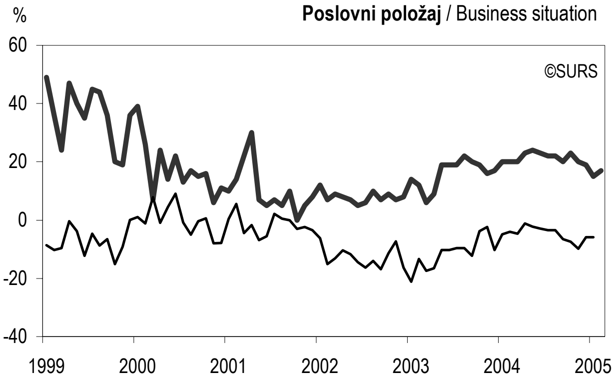
**The chart on retail trade obstacles shows the share of enterprises faced with the following groups of problems:**

- 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.

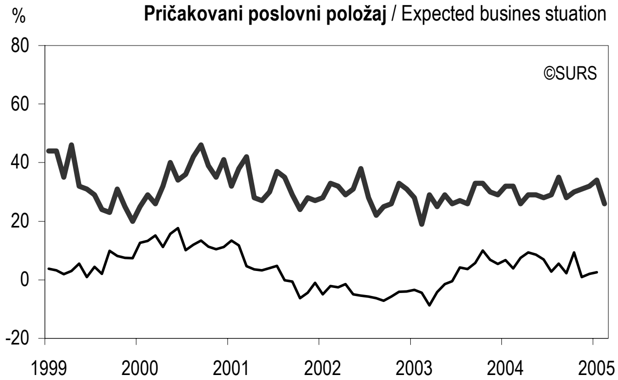
## 3. GIBANJE EKONOMSKIH KAZALCEV V TRGOVINI NA DROBNO V SLOVENIJI IN EU[1)], JANUAR 1999 - FEBRUAR 2005
EVOLUTION OF ECONOMIC INDICATORS IN RETAIL TRADE IN SLOVENIA AND EU[1)], JANUARY 1999 - FEBRUARY 2005

| **Ocena stanj**<br>Appreciation of situation | **Pričakovanja v naslednjih 3 mesecih**<br>Expectations in the next 3 months |
|---|---|

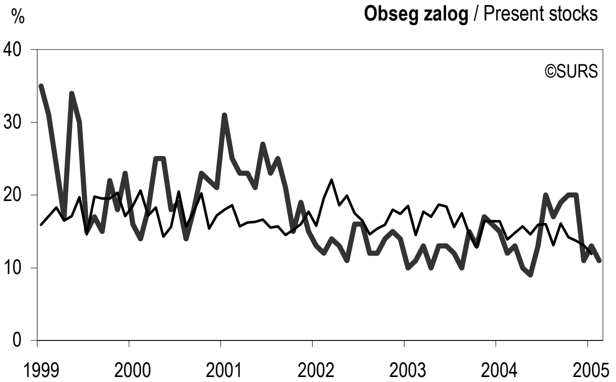
**Poslovni položaj** / Business situation




**Pričakovani poslovni položaj** / Expected busines stuation

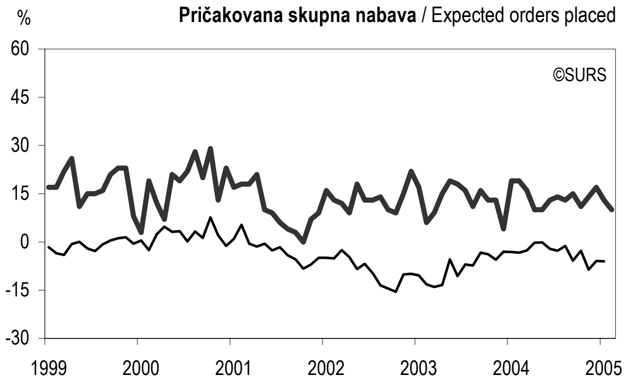



**Obseg zalog** / Present stocks




**Pričakovano zaposlovanje** / Expected employment


**Pričakovana skupna nabava** / Expected orders placed




Slovenija/ Slovenia — EU/EU

1) Vir podatkov je Evropska komisija. Podatki o EU za zadnji mesec 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 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 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 izražajo relativno pomembnost posameznega podjetja v vzorcu. Znotraj razredov SKD-ja 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.

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 COLLECTION

The survey is carried out monthly by mail.

### WEIGHTS FOR RESPONSES

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

### NON-RESPONSES

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

### DEFINITIONS AND EXPLANATIONS

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

Grafi prikazujejo desezonirane vrednosti. To so vrednosti, pri katerih je izločen vpliv sezonskih dejavnikov, vsebujejo pa trend - cikel in naključno komponento. Podatki za EU so desezonirani z metodo DAINTIES, za Slovenijo pa z metodo TRAMO/SEATS, ki temelji na ARIMA modelih. Pri oblikovanju modelov smo upoštevali obdobje od januarja 1999 do januarja 2005. Pri pričakovanem povpraševanju se model za leto 2005 zaradi narave podatkov razlikuje od modela za leto 2004. Pri sedanjem poslovnem položaju, obsegu zalog, pričakovanem zaposlovanju, prodajnih cenah, pričakovanih prodajnih cenah, ravni prodaje in gibanju prodaje za to obdobje leta sezonska komponenta ni prisotna.

**Kazalec zaupanja** je povprečje odgovorov (ravnotežij) na vprašanja o sedanjem in pričakovanem poslovnem položaju 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 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. Business situation, present 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 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 februarju 2005 je bila desezonirana vrednost kazalca zaupanja v trgovini na drobno glede na pretekli mesec nižja za 2 odstotni točki. Vrednost kazalca je padla tudi v primerjavi z lanskim februarjem in v primerjavi z lanskim povprečjem, in sicer za 3 odstotne točke oziroma 2 odstotni točki.**

Na padec vrednosti kazalca zaupanja je vplivalo poslabšanje kazalca pričakovani poslovni položaj. Po drugi strani pa sta kazalca sedanji poslovni položaj in obseg zalog pozitivno vplivala na gibanje kazalca zaupanja.

Kazalci stanj so se izboljšali. Izjema sta bila kazalca obseg zalog in gibanje prodaje za to obdobje leta. Po drugi strani pa so se vsi kazalci pričakovanj poslabšali, razen kazalca pričakovane prodajne cene.

**COMMENT**

**In February 2005 the seasonally adjusted retail trade confidence indicator fell by 2 percentage points compared to the previous month. Its value also went down compared to February 2004 and to last year's average, i.e. by 3 and 2 percentage points, respectively.**

The drop in the confidence indicator was influenced by the worsening of the indicator of the expected business situation. On the other hand, the indicators of the present business situation and the present stocks positively influenced its development.

Situation indicators improved, only the indicators of present stocks and evolution of sales for this period of year worsened. On the other hand, all expectation indicators worsened, except the indicator of selling prices expectations.

**PRIČAKOVANJA**

**PRIČAKOVANI POSLOVNI POLOŽAJ**

Desezonirana vrednost kazalca pričakovani poslovni položaj se je opazno znižala v vseh treh primerjavah. Vrednost je glede na pretekli mesec padla za 8 odstotnih točk, glede na februar 2004 za 7 odstotnih točk in glede na lansko povprečje za 4 odstotne točke.

**PRIČAKOVANE PRODAJNE CENE**

Vrednost kazalca pričakovane prodajne cene se je vidno izboljšala v vseh treh primerjavah. V primerjavi s preteklim mesecem je bila vrednost kazalca višja za 9 odstotnih točk, medtem ko je bila tako glede na februar 2004 kot tudi glede na lansko povprečje višja za 18 odstotnih točk.

**PRIČAKOVANO ZAPOSLOVANJE**

Vrednost kazalca pričakovano zaposlovanje je izrazito padla. V primerjavi s preteklim mesecem je vrednost padla za 18 odstotnih točk, glede na isti mesec lanskega leta za 19 odstotnih točk in bila za 13 odstotnih točk pod lanskim povprečjem.

**PRIČAKOVANA SKUPNA NABAVA**

Tudi desezonirana vrednost kazalca pričakovana skupna nabava se je poslabšala v vseh primerjavah. V primerjavi z januarjem 2005 se je vrednost znižala za 3 odstotne točke, v primerjavi s februarjem 2004 za 9 odstotnih točk in v primerjavi z lanskim povprečjem za 4 odstotne točke.

**PRIČAKOVANO POVPRAŠEVANJE**

Desezonirana vrednost kazalca pričakovano povpraševanje je bila v primerjavi s preteklim mesecem nižja za 2 odstotni točki. Glede na isti mesec lanskega leta je njegova vrednost izrazito padla, in sicer za 23 odstotnih točk in se glede na lansko povprečje znižala samo za 2 odstotni točki.

**EXPECTATIONS**

**EXPECTED BUSINESS SITUATION**

The seasonally adjusted value of the expected business situation indicator noticeably declined in all three comparisons. Compared to the previous month it fell by 8 percentage points, compared to February 2004 by 7 percentage points and compared to last year's average by 4 percentage points.

**SELLING PRICES EXPECTATIONS**

The selling prices expectations indicator markedly improved in all three comparisons. Compared to the previous month it rose by 9 percentage points, while compared to February 2004 and to last year's average it rose by 18 percentage points.

**EXPECTED EMPLOYMENT**

The expected employment indicator plummeted. In comparison with the previous month it was down by 18 percentage points, compared to February 2004 by 19 percentage points and compared to last year's average by 13 percentage points.

**EXPECTED ORDERS**

The seasonally adjusted value of the expected orders indicator also worsened in all three comparisons. In comparison with January 2005 it declined by 3 percentage points, compared to February 2004 by 9 percentage points and compared to last year's average by 4 percentage points.

**EXPECTED DEMAND**

Compared to the previous month, the seasonally adjusted value of the expected demand indicator went down by 2 percentage points. Compared to February 2004 it declined significantly, i.e. by 23 percentage points, while compared to last year's average it fell only by 2 percentage points.

**OCENA STANJ**

**POSLOVNI POLOŽAJ**

V februarju 2005 se je vrednost kazalca poslovni položaj v primerjavi s preteklim mesecem zvišala za 2 odstotni točki. Medtem ko je vrednost v primerjavi z istim mesecem lanskega leta in v primerjavi z lanskim povprečjem padla za 3 oziroma 4 odstotne točke.

**APPRECIATION OF SITUATION**

**BUSINESS SITUATION**

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

**PRODAJNE CENE**

Vrednost kazalca prodajne cene je pokazala mesečno zvišanje, in sicer za 18 odstotnih točk. Velik porast vrednosti je bil zabeležen tudi v primerjavi z istim mesecem lanskega leta (za 27 odstotnih točk) in v primerjavi z lanskim povprečjem (za 10 odstotnih točk).

**SELLING PRICES**

In a month-to-month comparison the selling prices indicator showed a rise by 18 percentage points. A strong increase of the value was recorded also in comparison with February 2004 (by 27 percentage points) and in comparison with last year's average (by 10 percentage points).

**FINANČNI POLOŽAJ**

Desezonirana vrednost kazalca finančni položaj je bila v primerjavi s preteklim mesecem višja za 5 odstotnih točk. V primerjavi s februarjem 2004 je bila vrednost višja kar za 8 odstotnih točk in je ostala enaka kot lanskoletno povprečje.

**FINANCIAL SITUATION**

The seasonally adjusted value of the financial situation indicator was up by 5 percentage points compared to the previous month. Compared to February 2004 it rose by 8 percentage points and it remained the same as the last year's average.

**OBSEG ZALOG**

Obseg zalog se je v primerjavi s preteklim mesecem zmanjšal, saj je bila vrednost kazalca obseg zalog nižja za 2 odstotni točki. Njegova vrednost je padla tudi glede na pretekli mesec in glede na lansko povprečje, in sicer za 1 odstotno točko oziroma 4 odstotne točke.

**PRESENT STOCKS**

The volume of the present stocks fell as the value of the present stocks indicator showed a month-to-month fall by 2 percentage points. The value also fell compared to February 2004 and to last year's average, i.e. by 1 and 4 percentage points, respectively.

**RAVEN PRODAJE**

Vrednost kazalca raven prodaje se je izrazito zvišala v vseh treh primerjavah. V primerjavi s preteklim mesecem je vrednost zrasla za 27 odstotnih točk, v primerjavi z februarjem 2004 za 21 odstotnih točk in v primerjavi z lanskim povprečjem za 12 odstotnih točk.

**LEVEL OF SALES**

The level of sales indicator increased significantly in all three comparisons. Compared to the previous month it went up by 27 percentage points, compared to February 2004 by 21 percentage points and compared to last year's average by 12 percentage points.

**KONKURENČNOST**

Desezonirana vrednost kazalca konkurenčnost je v primerjavi z januarjem 2005 ostala nespremenjena. V primerjavi z istim mesecem lani in z lanskim povprečjem je njegova vrednost padla, in sicer za 7 oziroma 5 odstotnih točk.

**COMPETITION**

The seasonally adjusted value of the competition indicator remained the same as in January 2005. Compared to February 2004 and to last year's average its value fell by 7 and 5 percentage points, respectively.

**GIBANJE PRODAJE ZA TO OBDOBJE LETA**

Vrednost kazalca gibanje prodaje za to obdobje leta je rahlo padla v primerjavi s preteklim mesecem (za 1 odstotno točko). Njegova vrednost je padla tudi v primerjavi z istim mesecem lanskega leta in v primerjavi z lanskim povprečjem, in sicer za 7 oziroma za 4 odstotne točke.

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

The evolution of sales indicator slightly fell compared to the previous month (by 1 percentage point). It was also down in comparison with the same month last year and in comparison with last year's average, i.e. by 7 and 4 percentage points, respectively.

**OMEJITVENI DEJAVNIKI V TRGOVINI NA DROBNO**

V trgovini na drobno se je 35 % podjetij (oz. 27 % prihodka) srečevalo z dejavniki iz skupine *"hude omejitve"*. Delež teh podjetij se v primerjavi s preteklim mesecem ni spremenil, medtem ko je bil za 1 odstotno točko višji kot v istem mesecu lanskega leta.

Podjetij, ki so se srečevala s skupino dejavnikov *"težave s ponudbo"*, je bilo 28 % (oz. 26 % prihodka). Delež teh podjetij je bil nižji tako glede na pretekli mesec kot tudi glede na isti mesec lanskega leta, in sicer za 1 odstotno točko oziroma za 4 odstotne točke.

Podjetij, ki so se srečevala s skupino dejavnikov *"težave s povpraševanjem"*, je bilo 28 % (oz. 30 % prihodka), kar je bilo za 1 odstotno točko več kot v preteklem mesecu in za 3 odstotne točke več kot v lanskem februarju.

Podjetij, ki *niso imela omejitev* v poslovanju, je bilo 9 % (oz. 17 % prihodka). Delež teh podjetij je bil tako glede na pretekli mesec kot tudi glede na februar 2004 nespremenjen.

**OBSTACLES IN RETAIL TRADE**

In retail trade 35% of enterprises (27% of turnover) were faced with *"severe obstacles"* in trading. Compared to the previous month the share of these enterprises remained unchanged while it was 1 percentage point higher than in the same month of the last year.

The share of enterprises faced with *"supply difficulties"* was 28% (26% of turnover). This share was lower compared to the previous month as well as compared to February 2004, i.e. by 1 and 4 percentage points.

The share of enterprises faced with *"demand difficulties"* was 28% (30% of turnover), which was 1 percentage point more than in the previous month and 3 percentage points more than in February 2004.

Only 9% of enterprises (17% of turnover) experienced *no obstacles.* The share of these enterprises remained the same as in the previous month and in February 2004.

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

- 46 % podjetij (ali 46 % prihodka) je omejevala konkurenca v sektorju,
- 37 % podjetij (ali 35 % prihodka) so omejevali visoki stroški dela,
- 34 % podjetij (ali 25 % prihodka) je omejevalo nezadostno povpraševanje,
- 25 % podjetij (ali 29 % prihodka) je omejevala visoka cena denarja,
- 14 % podjetij (ali 10 % prihodka) je omejevala premajhna prodajna površina,
- 12 % podjetij (ali 7 % prihodka) je omejevala dostopnost do bančnih posojil,
- 10 % podjetij (ali 7 % prihodka) so omejevali drugi dejavniki, kot so finančna nedisciplina, visoke najemnine, slaba lokacija itd.,
- 9 % podjetij (ali 17 % prihodka) ni imelo omejitev v poslovanju,
- 6 % podjetij (ali 2 % prihodka) so omejevali premajhni skladiščni prostori,
- 3 % podjetij (ali 1 % prihodka) je omejevala slaba ponudba.

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

- 46% of enterprises (or 46% of turnover) were limited by competition in own sector,
- 37% of enterprises (or 35% of turnover) were limited by high cost of labour,
- 34% of enterprises (or 25% of turnover) were limited by insufficient demand,
- 25% of enterprises (or 29% of turnover) were limited by high cost of money,
- 14% of enterprises (or 10% of turnover) were limited by shortage of sales surface,
- 12% of enterprises (or 7% of turnover) were limited by access to bank credits,
- 10% of enterprises (or 7% of turnover) were limited by other factors such as lack of financial discipline, high rents, bad location, etc.,
- 9% of enterprises (or 17% of turnover) experienced no obstacles,
- 6% of enterprises (or 2% 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%.

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