



វិទ្យាស្ថានបណ្តុះបណ្តាល និង ស្រាវជ្រាវដើម្បីអភិវឌ្ឍន៍កម្ពុជា
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Flash Report on the Cambodian Economy

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ការបកស្រាយតារាងសំខាន់

របាយការណ៍នេះ បកស្រាយពីស្ថានភាពសេដ្ឋកិច្ចមួយចំនួនរបស់កម្ពុជា និងបណ្តាប្រទេសជាដៃគូពាណិជ្ជកម្ម ដោយធ្វើការប្រៀបធៀបគ្នាលើខ្លឹមសារ ជាមួយនឹង ខែមុនៗ។

នៅត្រីមាសទី២ ឆ្នាំ២០១៣ វិនិយោគក្នុងវិស័យសេដ្ឋកិច្ចជាប់លាប់ខាងខណ្ឌហកម្មអនុម័តដោយក្រុមប្រឹក្សាអភិវឌ្ឍន៍កម្ពុជា កើនដល់ ១,៩ពាន់លានដុល្លារ ធៀបនឹង ១៩៥,៧លានដុល្លារ កាលពីត្រីមាសមុន និង ១៧៦,៣លានដុល្លារ កាលពីឆ្នាំមុន។

នៅខែកក្កដា ធៀបរបាយការណ៍សរុបកើន ១២,៤% ធៀបខែមុន (១៩,២% ធៀបឆ្នាំមុន)។ ភ្ញៀវមកលំហែកើន ១២,៧% (២៤,៤% ធៀបឆ្នាំមុន) រីឯភ្ញៀវមកធ្វើជំនួញកើន ៨,៤% (៩,៧% ធៀបឆ្នាំមុន)។ កំណើននេះទទួលបាន ទោះបីស្ថានភាពនានានៅកម្ពុជាបញ្ជាក់នូវការរីកចម្រើនសេដ្ឋកិច្ច ទាក់ទងនឹងការបោះឆ្នោតក្នុងខែកក្កដា។ ភ្ញៀវផ្សេងៗទៀតធ្លាក់ចុះ ០,៧% ធៀបខែមុន (៧៨,៤% ធៀបឆ្នាំមុន)។

នៅខែមិថុនា តម្លៃអនុម័តគម្រោងសាងសង់សរុបកើនដល់ ២៤០,៥លានដុល្លារ ធៀបនឹង ៨,៧លានដុល្លារ កាលពីខែមុន និង ១២,៥លានដុល្លារ កាលពីឆ្នាំមុន ក្នុងនេះសម្រាប់ភូមិគ្រឹះនិងផ្ទះ រាកើនដល់ ៤,១លានដុល្លារ ធៀបនឹង ០,២លានដុល្លារ កាលពីខែមុន និងសម្រាប់ផ្ទះល្វែងរាកើនដល់ ២៥,១លានដុល្លារ (ខែមុន ២,៥លានដុល្លារ)។ នេះជាការបន្តរីកចម្រើនវិញក្នុងវិស័យនេះ ក្រោយត្រូវបានប៉ះពាល់ជាប្រយោលពីវិបត្តិហិរញ្ញវត្ថុសកល។ ថ្មីៗនេះ មានគម្រោងសាងសង់ដ៏ធំមកពីហុងកុង និងកូរ៉េខាងត្បូង។

នៅខែកក្កដា សន្ទស្សន៍ថ្លៃទំនិញប្រើប្រាស់ (គ្រប់មុខ) កើន ១,១% ធៀបខែមុន (៤,០% ធៀបឆ្នាំមុន)។ ទោះជាអត្រា ៤% ជាអត្រាកំណើនល្មមអាចគ្រប់គ្រងបានក្តី ក៏រដ្ឋាភិបាលត្រូវតែប្រុងប្រយ័ត្នលើកត្តាពីរ (ចំណាយ វត្ថុធាតុដើមសំខាន់ៗ និងការផ្គត់ផ្គង់រូបិយវត្ថុ) ដែលអាចបង្កើនថ្លៃទំនិញជាទូទៅ។ ថ្លៃអាហារ និងភេសជ្ជៈគ្មានជាតិស្រាវកើន ១,០% (៤,៨ ធៀបឆ្នាំមុន), ថ្លៃសម្លៀកបំពាក់ និងស្បែកជើងកើន ០,៥% (៥,១% ធៀបឆ្នាំមុន) ហើយថ្លៃស្លាកំដៅ និងទឹកភ្លើងកើន ០,៥% (០,៦% ធៀបឆ្នាំមុន)។ ថ្លៃសេវាថែទាំសុខភាពកើន ២,៣% (៦,៣% ធៀបឆ្នាំមុន) ហើយថ្លៃអប់រំកើន ៤,១% (៦,៦% ធៀបឆ្នាំមុន)។ ការឡើងថ្លៃសេវាសំខាន់ៗទាំងនេះអាចជះឥទ្ធិពលខ្លាំងលើលទ្ធភាពរបស់គ្រួសារក្រីក្រ និងគ្រួសារមធ្យមកម្រិតទាបក្នុងការប្រើប្រាស់សេវាថែទាំសុខភាព និងសេវាអប់រំមានគុណភាព។

នៅខែសីហា ម៉ាស៊ីនធ្លាក់ថ្លៃ ២,៥% ធៀបខែមុន (១,១% ធៀបឆ្នាំមុន) មកត្រឹម ៤៩៩៩រៀល/លីត្រ ហើយសាំងធ្លាក់ថ្លៃ ៣,០% (២,៣% ធៀបឆ្នាំមុន) មកត្រឹម ៥២១៧រៀល/លីត្រ ដែលបណ្តាលមួយផ្នែកពីការធ្លាក់ចុះជាបន្តបន្ទាប់នៃថ្លៃប្រេងនៅ។ នៅខែកញ្ញា ប្រាក់រៀលនៅថេរ ទល់នឹងដុល្លារ ធៀបខែមុន ប៉ុន្តែធ្លាក់ថ្លៃ ០,៥% ធៀបឆ្នាំមុន។ ប្រាក់រៀលធ្លាក់ថ្លៃ ០,៩% (១,៣% ធៀបឆ្នាំមុន) ទល់នឹងប្រាក់បាតថៃ។

នៅខែកក្កដា ការនាំចូលសម្ភារៈសំណង់កើន ១,៣% ធៀបខែមុន (១២,៧% ធៀបឆ្នាំមុន) ដល់ ៦,១លានដុល្លារ។ ការនាំចូលស៊ីម៉ង់ត៍ធ្លាក់ចុះ ៤,៤% ធៀបខែមុន មកត្រឹម ៨,៤លានដុល្លារ ប៉ុន្តែកើន ១,៦% បើធៀបនឹងឆ្នាំមុន)។ ការនាំចូលដែកថែបធ្លាក់ចុះ ៤,០% (១៦,៦% ធៀបឆ្នាំមុន) មកត្រឹម ៧,៦លានដុល្លារ។ ការធ្លាក់ចុះនេះកើតមានឡើងក្នុងពេលដែលវិស័យសំណង់កំពុងតែរីកចម្រើនវិញ។ ក្នុងខែដដែល ការនាំចេញសម្លៀកបំពាក់ (គ្រប់មុខ) ធ្លាក់ចុះ ២,៤% ធៀបខែមុន (តែកើន ១៥,១% ធៀបឆ្នាំមុន) ដល់ ៤៥៣,១លានដុល្លារ។ ការនាំចេញស្បែកជើងធ្លាក់ចុះ ២,៧% (កើន ១៥,៧% ធៀបឆ្នាំមុន) ដល់ ៣២,៦លានដុល្លារ ហើយការនាំចេញផលិតផលវាយនភ័ណ្ឌផ្សេងទៀតធ្លាក់ចុះ ៤៩,២% (កើន ៥០,៨% ធៀបឆ្នាំមុន) ដល់ ៧,២លានដុល្លារ។ ការនាំចេញក្នុងមួយឆ្នាំកន្លងទៅ មានលទ្ធផលគួរពេញចិត្ត ទោះបីជាមានឡើងចុះតាមខែ ដែលអាចមកពីការធ្វើកូដិកម្មរបស់កម្ពុជា និងការពន្យារពេលវិនិយោគដោយសារការបោះឆ្នោតក្នុងខែកក្កដាក្តី។ ឱកាសធ្វើអាជីវកម្មផ្នែកកាត់ដេរ នៅតែបន្តទាក់ទាញវិនិយោគិនទាំងនៅក្នុងស្រុក និងពីបរទេស។ នៅខែកក្កដា ការនាំចូលប្រេងសាំងធ្លាក់ចុះ ៩,៥% ធៀបនឹងខែមុន (២៣,៤% ធៀបឆ្នាំមុន) មកត្រឹម ២១,៨លានដុល្លារ ហើយការនាំចូលម៉ាស៊ីនធ្លាក់ចុះ ៣៦,៧% (១៣,២% ធៀបឆ្នាំមុន) មកត្រឹម ៥,៤លានដុល្លារ ប៉ុន្តែការនាំចូលម៉ាស៊ីនកើន ១៥,៩% (១៣,០% ធៀបឆ្នាំមុន) ដល់ ៥២,៣លានដុល្លារ ដែលឆ្លុះបញ្ចាំងពីកំណើនការប្រើម៉ាស៊ីន ដោយសារប្រសិទ្ធភាពផ្នែកចំណាយរបស់វា។

នៅខែមេសា ចំណូលចរន្តរដ្ឋាភិបាលសរុបកើន ៣៣,១% ធៀបខែមុន (២១,២%

Highlights

This report highlights a number of economic indicators of Cambodia and its partners. It compares recent figures with those of earlier periods.

In the second quarter, total fixed asset investments in industry approved by the Council for the Development of Cambodia jumped to USD1.9 bn from USD195.7 m a quarter earlier and USD176.3 m a year earlier.

In July, total foreign visitor arrivals increased 12.4 percent from the previous month (19.2 percent year on year). Holiday arrivals went up 12.7 percent (24.4 percent year on year) and business arrivals by 8.4 percent (9.7 percent year on year). The increase came amid security warnings from foreign embassies regarding the July national election. "Other" arrivals dropped by 0.7 percent from the previous month (78.4 percent year on year).

In June, the total value of construction approvals skyrocketed to USD240.5 m from USD8.7 m a month earlier and USD12.5 m in the previous year. The value of villas and houses rose to USD4.1 m from USD0.2 m the previous month and that of flats to USD25.1 m from USD2.5 m. The rise signified continued recovery in the sector, which was indirectly impacted by the global financial crisis. Recently, there have been construction mega-projects from Hong Kong and South Korea.

The consumer price index (all items) in July increased by 1.1 percent from the preceding month (4.0 percent year on year). Although 4 percent might still be manageable, the government needs to be vigilant on two factors (costs of important raw materials and money supply) that could raise overall prices. The price of food and non-alcoholic beverages rose 1.0 percent (4.8 percent year on year), of clothing and footwear 0.5 percent (5.1 percent year on year) and of housing and utilities 0.5 percent (0.6 percent year on year). The price of health care services went up 2.3 percent from a month earlier (6.3 percent year on year) and of education 4.1 percent (6.6 percent year on year). The price increase in these important services could potentially affect access to quality health care and education by poor and lower middle income households.

In August, the price of diesel fuel declined by 2.5 percent from the preceding month (1.1 percent year on year) to KHR4999/litre and of gasoline by 3.0 percent (2.3 percent year on year) to KHR5217/litre. A continued decrease in the crude oil price might partly explain the drop. In September, the riel was unchanged from the previous month against the US dollar, but depreciated 0.5 percent year on year. The riel appreciated 0.9 percent from the previous month (1.3 percent year on year) against the Thai baht.

In July, imports of construction equipment increased by 1.3 percent from the preceding month (12.7 percent year on year) to USD6.1 m. Imports of cement dropped 4.4 percent from a month earlier to USD8.4 m, but rose by 1.6 percent year on year. Imports of steel went down 4.0 percent from the previous month (16.6 percent year on year) to USD7.6 m. The decrease happened amid a continued recovery in construction. In the same month, exports of clothing (all kinds) dropped by 2.4 percent from a month earlier (15.1 percent rise year on year) to USD453.1 m and of shoes by 2.7 percent (15.7 percent increase year on year) to USD32.6 m and of other textile products by 49.2 percent (50.8 percent rise year on year) to USD7.2 m. Although there were monthly fluctuations possibly due to labour strikes and investments held up because of the July national election, year on year performance was still satisfactory. There are still business opportunities in garments that continue to attract local and foreign investors. Imports of gasoline in July declined by 9.5 percent from the preceding month (23.4 percent year on year) to USD21.8 m and of fuel oil by 36.7 percent (13.2 percent year on year) to USD5.4 m. Imports of diesel rose 15.9 percent from a month earlier (13.0 percent year on year) to USD52.3 m. This reflects the increased preference for diesel because of its cost efficiency.

In April, total government current revenue rose by 33.1 percent from the previous month (21.2 percent year on year) to KHR892 bn. Revenue from domestic taxes went up 53.7 percent (25.4

ធៀបឆ្នាំមុន) ដល់ ៨៩២ពាន់លានរៀល។ ចំណូលពន្ធក្នុងស្រុកកើន ៥៣,៧% (២៥,៤% ធៀបឆ្នាំមុន) ដល់ ៧១១,៤ពាន់លានរៀល។ ចំណូលពន្ធនាំចេញ និងនាំចូលធ្លាក់ចុះ ១៨,១% (០,៨% ធៀបឆ្នាំមុន) មកត្រឹម ១០២,៩ពាន់លានរៀល។ ចំណូលមិនមែនពន្ធក្នុងស្រុកចុះ ៥,១% (កើន ១៩,៤% ធៀបឆ្នាំមុន) មកត្រឹម ៧៧,៦ ពាន់លានរៀល។ កំណើនចំណូលពន្ធក្នុងស្រុក ការបន្តប្តេជ្ញាចិត្តរបស់រដ្ឋាភិបាលដើម្បី ពង្រឹងការប្រមូលពន្ធ។ កំណើនចំណូលពន្ធក្នុងស្រុកមានលក្ខណៈទាន់ពេលវេលាសម្រាប់ ប៉ះពាល់ដល់ការធ្លាក់ចុះនៃចំណូលពន្ធនាំចេញនិងនាំចូល ដែលបង្កមួយផ្នែកមកពី ការអនុវត្តនីតិវិធីថ្មីក្នុងតំបន់ និងអន្តរជាតិស្តីពីពាណិជ្ជកម្មសេរី។ ក្នុងខែដដែល ចំណាយចរន្តកើន ៥៨,៤% ធៀបខែមុន (៣,៧% ធៀបឆ្នាំមុន) ដល់ ៦១៩,៨ ពាន់លានដុល្លារ ក្នុងនោះចំណាយលើប្រៀបធៀបកើន ៥១,១% (៦,៧% ធៀបឆ្នាំមុន) ដល់ ២៣២,៣ពាន់លានរៀល ហើយចំណាយលើសេវាកម្មផ្សេងៗកើន ៣៩,៣% (១៧,៣% ធៀបឆ្នាំមុន) ដល់ ១៦៩,៤ពាន់លានរៀល។ ចំណាយលើឧបត្ថម្ភ និង ជំនួយសង្គមកើន ៨៨,១% (ធ្លាក់ចុះ ៧,៥% ធៀបឆ្នាំមុន) ដល់ ២១៨,១ពាន់លាន រៀល។ រដ្ឋាភិបាលត្រូវបន្តទប់ស្កាត់កាត់ចំណាយខ្លះខ្លាយ និងគិតគូររក្សា ឬបង្កើននូវ ចំណាយដ៏ចាំបាច់លើជំនួយសង្គម។

នៅខែកក្កដា អង្ករចំណុះថ្លៃ ៩,៥% ធៀបខែមុន (៤,១% ធៀបឆ្នាំមុន) មកត្រឹម ៦៤៥,៩ដុល្លារ/តោន, កៅស៊ូធ្លាក់ថ្លៃ ១៧,៤% (២៧,៧% ធៀបឆ្នាំមុន) មកត្រឹម ២០៣៣,៦ដុល្លារ/តោន ហើយម្សៅដំឡូងឈើធ្លាក់ថ្លៃ ១០,៨% (១០,៣% ធៀប ឆ្នាំមុន) មកត្រឹម ២៩១,៧ដុល្លារ/តោន។ នៅខែដដែល អង្ករវៀតណាមធ្លាក់ថ្លៃ ១,៨% (២,៤% ធៀបឆ្នាំមុន) មកត្រឹម ៤២៣,១ដុល្លារ/តោន, កៅស៊ូធ្លាក់ថ្លៃ ៣,៧% (២៣,០% ធៀបឆ្នាំមុន) មកត្រឹម ២១៨០,៣ដុល្លារ/តោន ហើយគ្រាប់ស្វាយចន្ទីធ្លាក់ថ្លៃ ០,៩% (១១,១% ធៀបឆ្នាំមុន) មកត្រឹម ៦១៧២,៤ដុល្លារ/តោន។

នៅខែកក្កដា ការនាំចេញអង្ករនៅចំកើន ៤៣,១% ធៀបខែមុន (៨,២% ធៀបឆ្នាំមុន) ដល់ ៤៣៦លានដុល្លារ ហើយការនាំចេញម្សៅដំឡូងឈើកើន ៨៧,៣% (៦៩,៤% ធៀបឆ្នាំមុន) ដល់ ២២៩,៤លានដុល្លារ។ ការនាំចេញកៅស៊ូនិងជំរេមធ្លាក់កើន ៧,៩% (ធ្លាក់ចុះ ២០,៥% ធៀបឆ្នាំមុន) ដល់ ៥៦០,៤លានដុល្លារ។ នៅខែដដែលនេះ ការនាំចេញអង្ករនៅវៀតណាមធ្លាក់ចុះ ០,៧% ធៀបខែមុន (៣០,៤% ធៀបឆ្នាំមុន) មកត្រឹម ២៧៨លានដុល្លារ។ ការនាំចេញគ្រាប់ស្វាយចន្ទីកើន ៣០,៧% (៤៣,២% ធៀបឆ្នាំមុន) ដល់ ១៧៩លានដុល្លារ។ ការនាំចេញកៅស៊ូកើន ៤១,៥% (ធ្លាក់ចុះ ២,២% ធៀបឆ្នាំមុន) ដល់ ២៦៦លានដុល្លារ។

នៅខែកក្កដា ការនាំចេញនៅសហរដ្ឋអាមេរិក ធ្លាក់ចុះ ១,២% ធៀបខែមុន មកត្រឹម ១៣២,៧ពាន់លានដុល្លារ ប៉ុន្តែកើន ១,៥% ធៀបនឹងឆ្នាំមុន។ ការនាំចេញនៅតំបន់អឺរ៉ុប ធ្លាក់ចុះ ២,៥% មកត្រឹម ២០៥,៣ពាន់លានដុល្លារ ប៉ុន្តែកើន ៧,៥% ធៀបនឹងឆ្នាំមុន។ ដូច្នោះ គឺមាននិទ្ទាភារវិបាកឡើងវិញនៅ សហរដ្ឋអាមេរិក និងតំបន់អឺរ៉ុប ទោះជាមានការ ឡើងចុះតាមខ្លីៗ។ ការនាំចេញនៅជប៉ុនធ្លាក់ចុះ ០,៨% (៩,៧% ធៀបឆ្នាំមុន) មកត្រឹម ៦០,៣ពាន់លានដុល្លារ ដែលបង្ហាញពីភាពមិនប្រាកដប្រជាផ្នែកសេដ្ឋកិច្ចជប៉ុន ទោះបីមានការអនុវត្តកម្មវិធី “Abenomics” ដើម្បីស្តារវិនិយោគផ្នែកអាជីវកម្មក្តី។ ការនាំចេញនៅម៉ាឡេស៊ីកើន ៥,៣% ធៀបខែមុន (៣,៧% ធៀបឆ្នាំមុន) ដល់ ១៩,០ពាន់លានដុល្លារ។ ការនាំចូលកើន ៨,៦% ធៀបខែមុន (៥,៤% ធៀបឆ្នាំមុន) ដល់ ១៨,១ពាន់លានដុល្លារ។ អតិរេកពាណិជ្ជកម្មនៅម៉ាឡេស៊ីធ្លាក់ចុះ ៣៥,៣% ធៀបនឹងខែមុន (២១,៧% ធៀបឆ្នាំមុន)

នៅខែសីហា អង្ករ USA 2/4 ធ្លាក់ថ្លៃ ៣,៣% ធៀបខែមុន (កើន ៥,៦% ធៀបឆ្នាំមុន) មកត្រឹម ៦១៨ដុល្លារ/តោន។ អង្ករ Thai 100%B ធ្លាក់ថ្លៃ ៦,៨% (១៦,០% ធៀប ឆ្នាំមុន) មកត្រឹម ៥០៥ដុល្លារ/តោន។ សណ្តែកសៀង (US No. 1) ធ្លាក់ថ្លៃ ៩,៣% (២០,៣% ធៀបឆ្នាំមុន) មកត្រឹម ៥២៣,៦ដុល្លារ/តោន ហើយពោត (US No. 2) ធ្លាក់ថ្លៃ ១៧,០% (២៧,៤% ធៀបឆ្នាំមុន) មកត្រឹម ២៤០,៣ដុល្លារ/តោន។ កៅស៊ូ ឡើងថ្លៃ ៦,២% (ធ្លាក់ថ្លៃ ៩,១% ធៀបឆ្នាំមុន) ដល់ ២៤១៩,៦ដុល្លារ/តោន។ ប្រេងឆៅឡើងថ្លៃ ២,៩% (ធ្លាក់ថ្លៃ ១,៨% ធៀបឆ្នាំមុន) ដល់ ១០៧,៥ដុល្លារ/តោន។ សាំង (US Gulf Coast) ឡើងថ្លៃ ០,៣% (ធ្លាក់ថ្លៃ ៣,៦% ធៀបឆ្នាំមុន) ដល់ ០,៧៦ដុល្លារ/លីត្រ ហើយម៉ាស៊ូតឡើងថ្លៃ ២,០% (ធ្លាក់ថ្លៃ ៣,៣% ធៀបឆ្នាំមុន) ដល់ ០,៨០ដុល្លារ/លីត្រ។

percent year on year) to KHR711.4 bn. Revenue from import and export taxes declined by 18.1 percent (0.8 percent year on year) to KHR102.9 bn. Non-tax revenue dropped by 5.1 percent from a month earlier, but rose 19.4 percent year on year to KHR77.6 bn. Increased current revenue indicates continued commitment from the government to strengthen tax collection. The increase in domestic tax revenue is timely given the declining revenue from import and export taxes. That decrease signifies partly the implementation of various regional and international initiatives on free trade. In the same month, current expenditure went up 58.4 percent from the preceding month (3.7 percent year on year) to KHR619.8 bn, of which expenditure on wages rose 51.1 percent (6.7 percent year on year) to KHR232.3 bn and of other services by 39.3 percent (17.3 percent year on year) to KHR169.4 bn. Expenditure on subsidies and social assistance increased 88.1 percent from a month earlier, but declined 7.5 percent year on year to KHR218.1 bn. The government still needs to curb wasteful spending and consider sustaining, if not increasing, amounts for necessary social assistance.

In July, the price of Thai rice declined by 9.5 percent from a month earlier (4.1 percent year on year) to USD645.9/tonne, of rubber by 17.4 percent (27.7 percent year on year) to USD2033.6/tonne and of tapioca by 10.8 percent (10.3 percent year on year) to USD291.7/tonne. In the same month, the price of Vietnamese rice decreased by 1.8 percent from a month earlier (2.4 percent year on year) to USD423.1/tonne, of rubber by 3.7 percent (23.0 percent year on year) to USD2180.3/tonne and of cashew nuts by 0.9 percent from a month earlier (11.1 percent year on year) to USD6172.4/tonne.

Exports of Thai rice in July went up 43.1 percent from the preceding month (8.2 percent year on year) to USD436 m and of tapioca by 87.3 percent (69.4 percent year on year) to USD229.4 m. Exports of natural rubber and similar natural gums rose by 7.9 percent from a month earlier to USD560.4 m, but year on year dropped by 20.5 percent. In the same month, exports of Vietnamese rice decreased 0.7 percent from a month earlier (30.4 percent year on year) to USD275. Exports of cashew nuts went up 30.7 percent from the preceding month (43.2 percent year on year) to USD179 m. Exports of rubber rose by 41.5 percent from a month earlier to USD266 m, but decreased by 2.2 percent year on year.

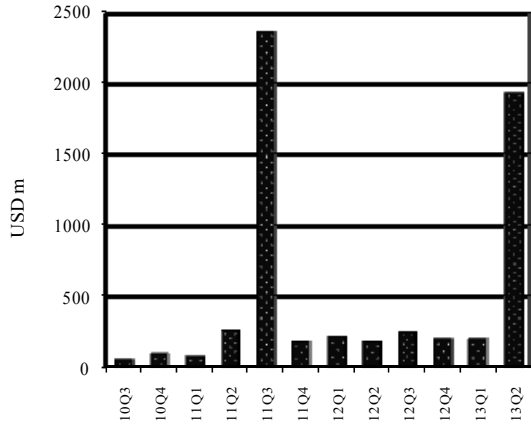
In July, US exports declined 1.2 percent from a month earlier to USD132.7 bn, but rose 1.5 percent year on year. Exports of the euro zone dropped by 2.5 percent from the preceding month to USD205.3 bn, but increased by 7.5 percent year on year. Thus, there has been recovery in the US and the EU despite monthly fluctuations. Japanese exports went down 0.8 percent from the preceding month (9.7 percent year on year) to USD60.3 bn. This indicates that there remained uncertainty in the Japanese economy even with the “Abenomics” programs to restore business investment. In July, Malaysian exports increased by 5.3 percent from a month earlier (3.7 percent year on year) to USD19.0 bn. Imports went up 8.6 percent from the previous month (5.4 percent year on year) to USD18.1 bn. The trade surplus decreased by 35.3 percent from the previous month (21.7 percent year on year).

In August, the price of USA 2/4 rice declined by 3.3 percent from the preceding month to USD618/tonne, but increased by 5.6 percent year on year. The price of Thai 100 percent B rice dropped 6.8 percent from the preceding month (16.0 percent year on year) to USD505/tonne. The price of soybeans (US No. 1) dropped by 9.3 percent from a month earlier (20.3 percent year on year) to USD523.6/tonne and of maize (US No. 2) by 17.0 percent (27.4 percent year on year) to USD240.3/tonne. The price of rubber increased 6.2 percent from the previous month to USD2419.6/tonne, but dropped 9.1 percent year on year. In August, the price of crude oil rose by 2.9 percent from a month earlier to USD107.5/barrel, but declined 1.8 percent year on year. The price of gasoline (US Gulf Coast) went up 0.3 percent (3.6 percent decrease year on year) to USD0.76/litre and of diesel fuel by 2.0 percent (3.3 percent decline year on year) to USD0.80/litre.

សកម្មភាពសេដ្ឋកិច្ចសំខាន់ៗ និង ថ្លៃទំនិញនៅកម្ពុជា

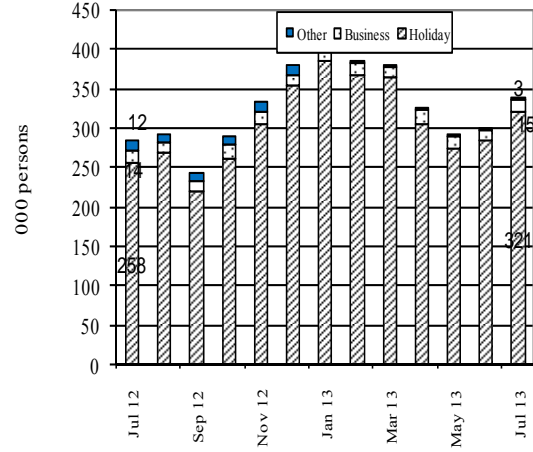
Main Economic Activities and Consumer Prices in Cambodia

Fixed Asset Investment Approvals by CDC*
Industry
2010 Q3–2013 Q2



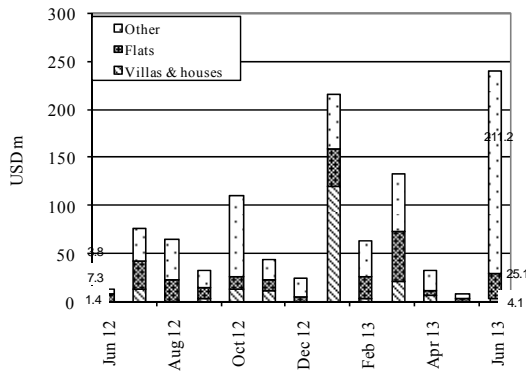
*Including expansion projects.
Source: Council for the Development of Cambodia

Foreign Visitor Arrivals
July 2012– July 2013



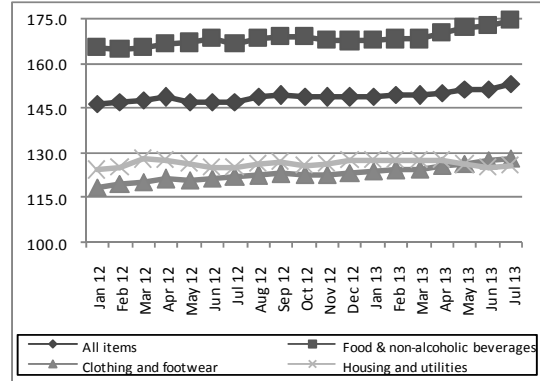
Source: Ministry of Tourism

Phnom Penh: Value of Construction Approvals
June 2012– June 2013



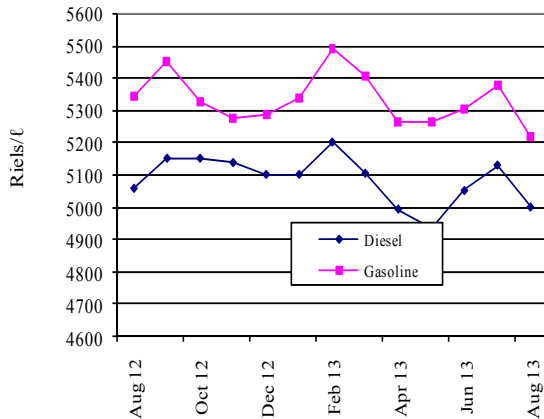
Source: Municipality of Phnom Penh

Consumer Price Index
(December 2006=100)
January 2012–July 2013



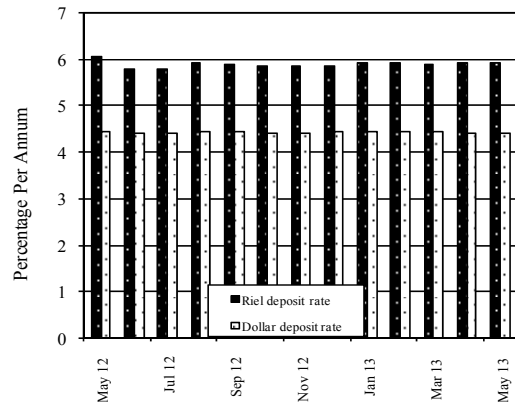
Source National Institute of Statistics

Phnom Penh: Gasoline & Diesel Prices
August 2012– August 2013



Source: CDRI

Interest Rates on 12-Month Bank Deposits
May 2012–May 2013

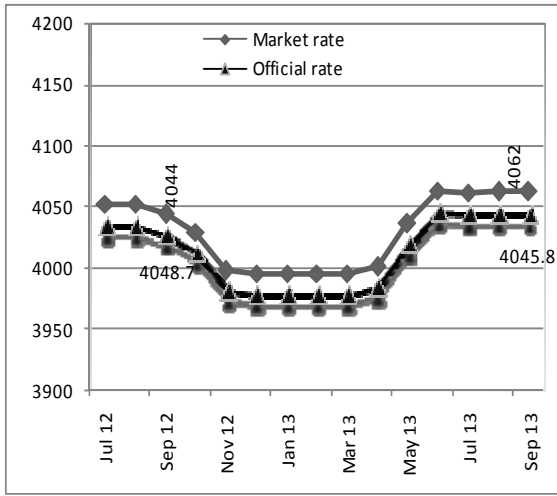


Source: Economic & Monetary Statistics, NBC

អត្រាប្តូររូបិយប័ណ្ណ និង ឥណទាន

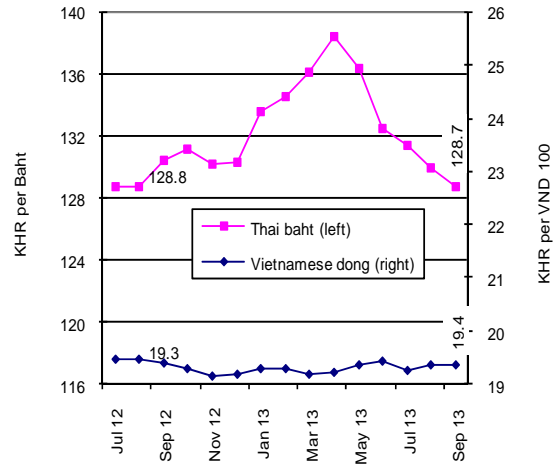
Exchange Rates, Money and Credit

Riels per US Dollar
July 2012– September 2013



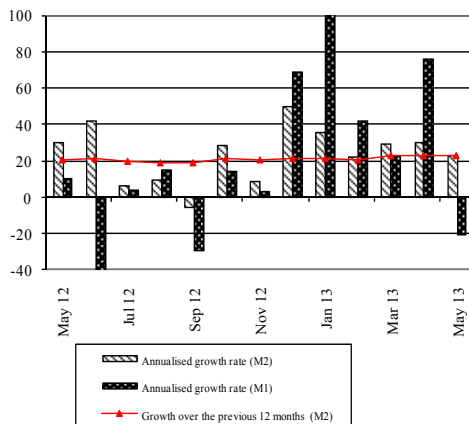
Source: National Bank of Cambodia

Riels per THB & VND
July 2012– September 2013



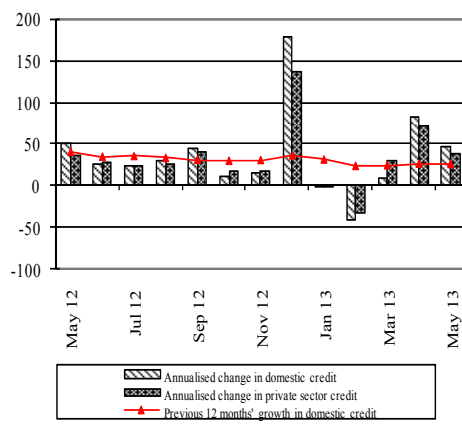
Source: National Bank of Cambodia

Monetary Survey (%)
May 2012– May 2013



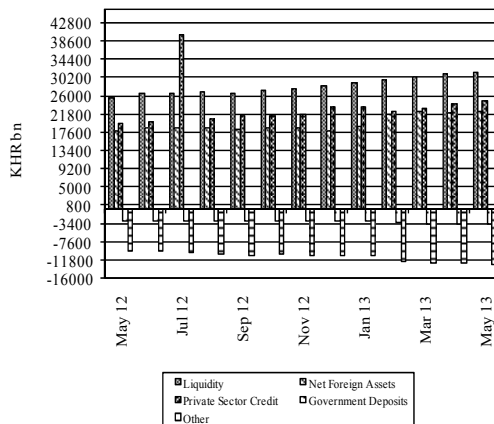
Source: National Bank of Cambodia

Domestic Credit (%)
May 2012– May 2013



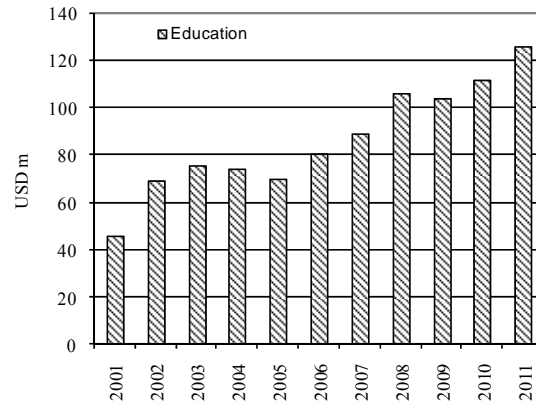
Source: National Bank of Cambodia

Monetary Survey
May 2012– May 2013



Source: National Bank of Cambodia

External Development Assistance Disbursement
Education
2001–2011

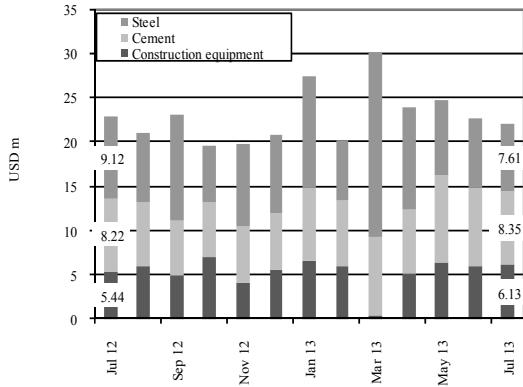


Source: The Cambodia Development Effectiveness Report 2011, CDC

ពាណិជ្ជកម្មក្រៅប្រទេស និង ការអនុវត្តថវិកាជាតិ

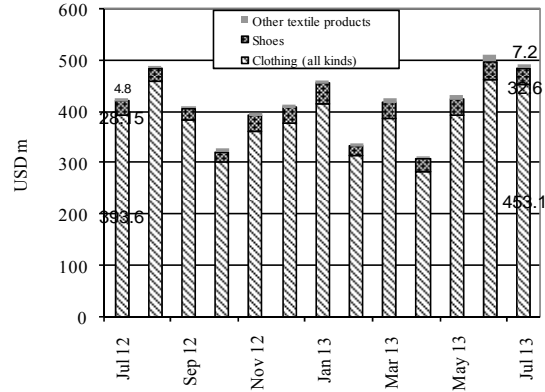
External Trade and National Budget Operations

Cambodian Imports
July 2012– July 2013



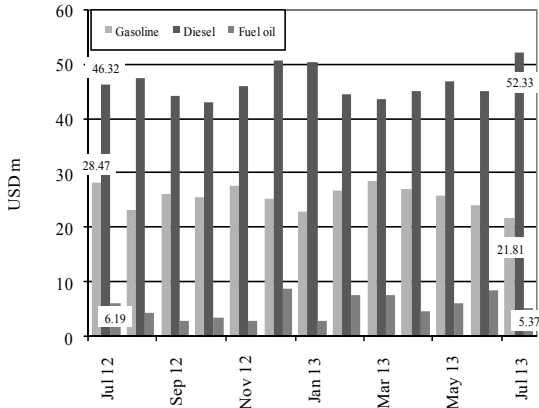
Source: Economic & Monetary Statistics, NBC

Cambodian Exports
July 2012– July 2013



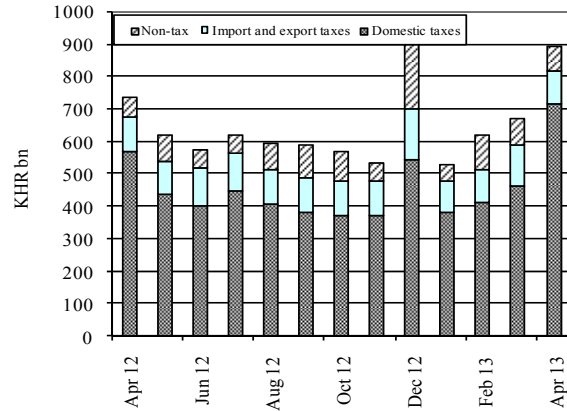
Source: Economic & Monetary Statistics, NBC

Imports: Energy
July 2012– July 2013



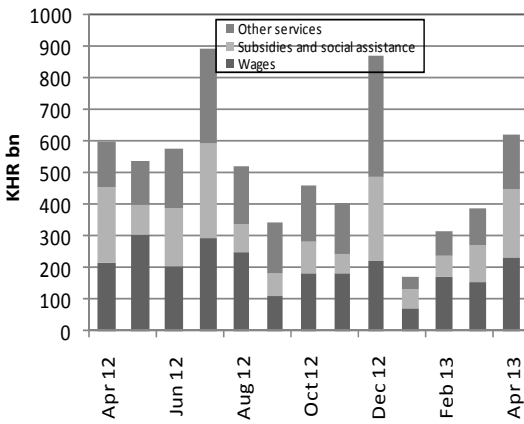
Source: Economic & Monetary Statistics, NBC

Current Budget Revenue
April 2012– April 2013



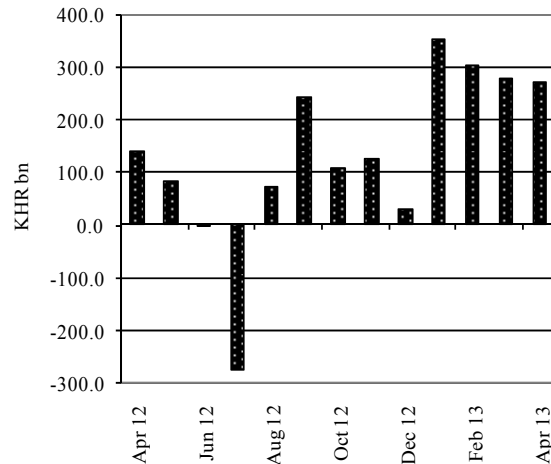
Source: MEF Bulletin

Current Budget Expenditure
April 2012– April 2013



Source: MEF Bulletin

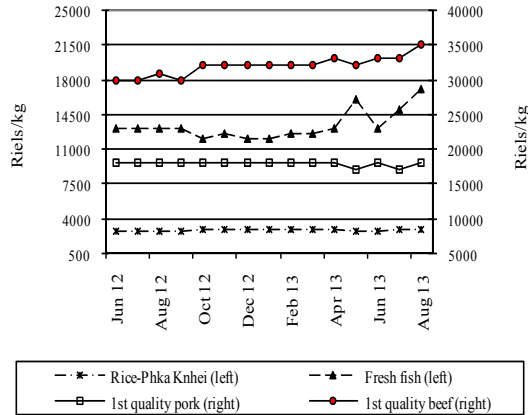
Current Budget Balance
April 2012– April 2013



Source: MEF Bulletin

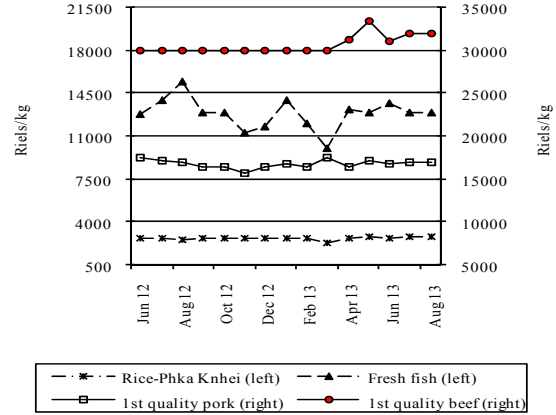
ផ្លូវស្បៀងអាហារតាមខេត្តក្នុងប្រទេសកម្ពុជា
Provincial Food Prices

Food Prices in Siem Reap Province
 June 2012–August 2013



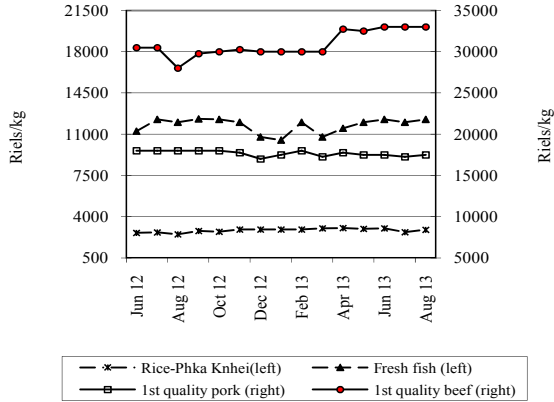
Source: CDRI

Food Prices in Battambang Province
 June 2012–August 2013



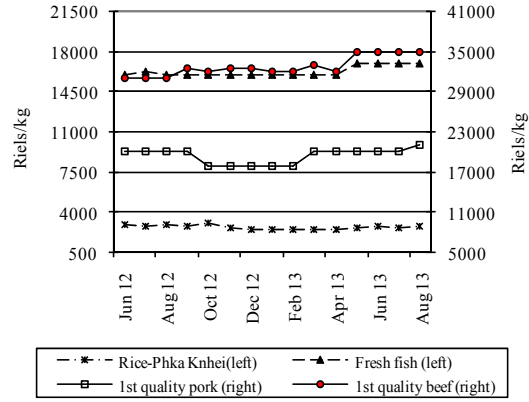
Source: CDRI

Food Prices in Kompong Cham Province
 June 2012–August 2013



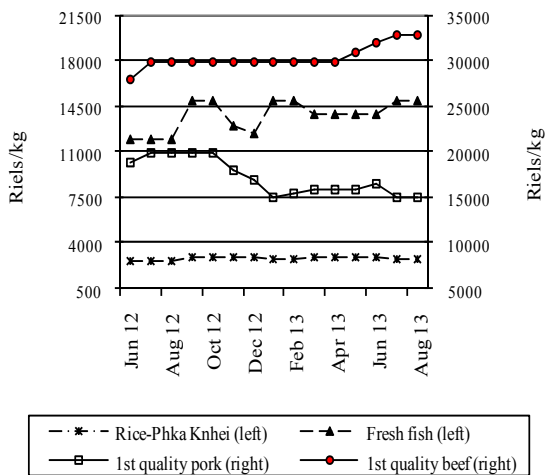
Source: CDRI

Food Prices in Kampot Province
 June 2012–August 2013



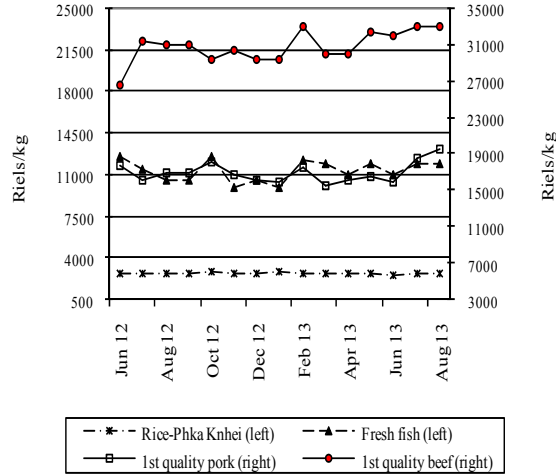
Source: CDRI

Food Prices in Svay Rieng Province
 June 2012–August 2013



Source: CDRI

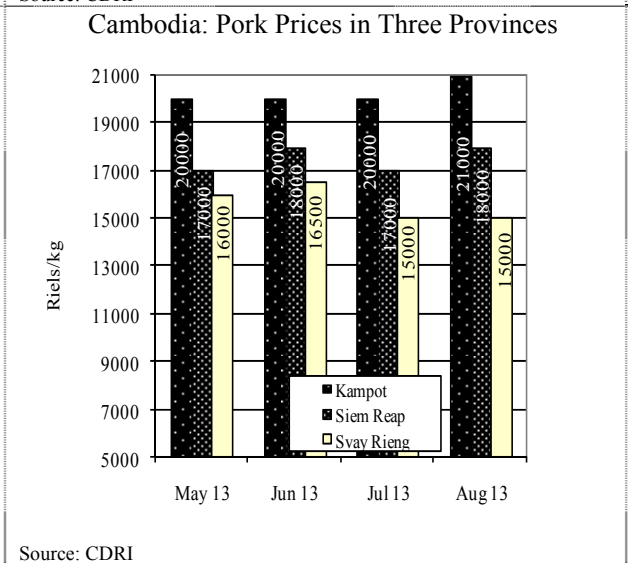
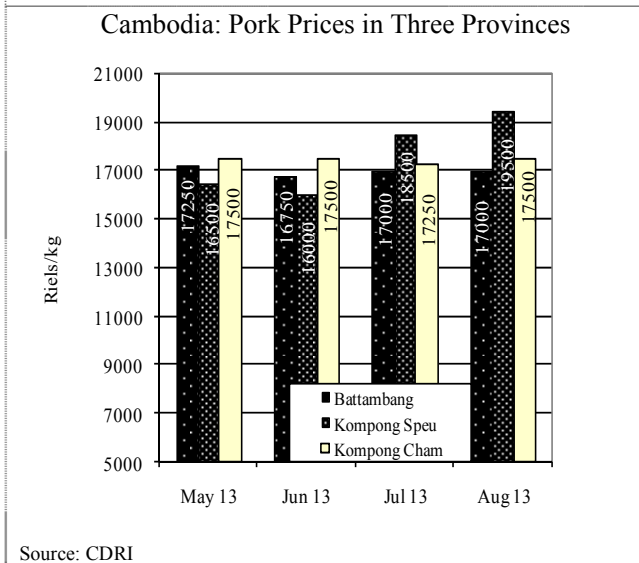
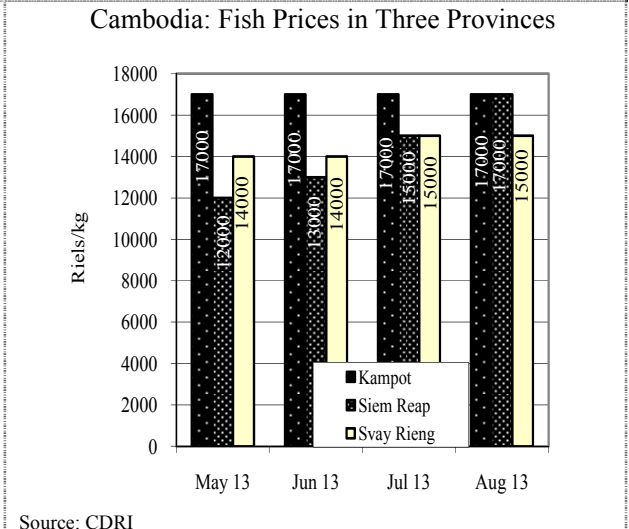
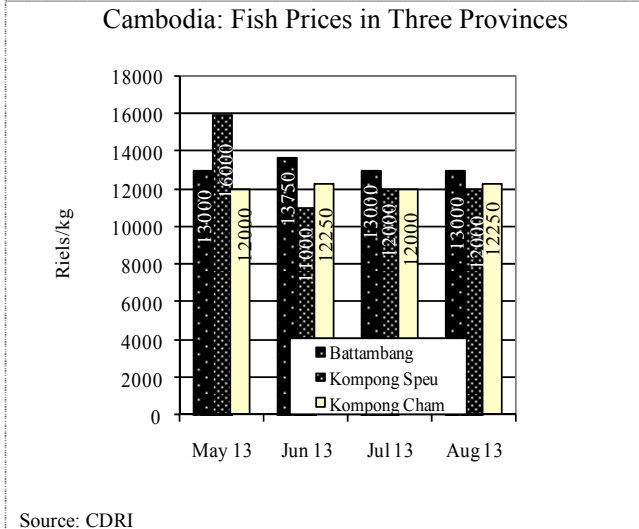
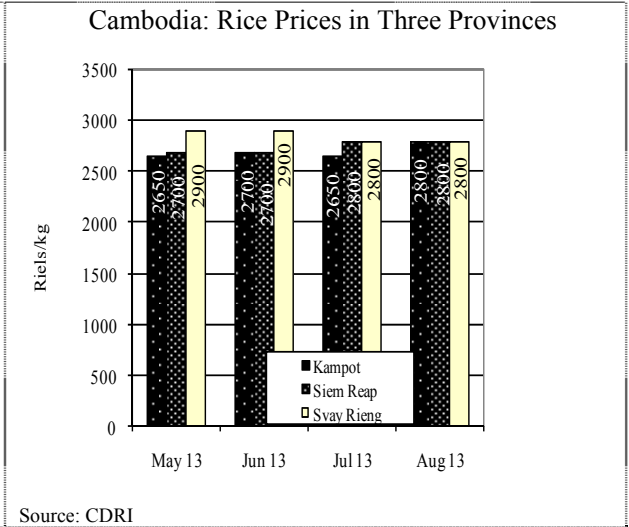
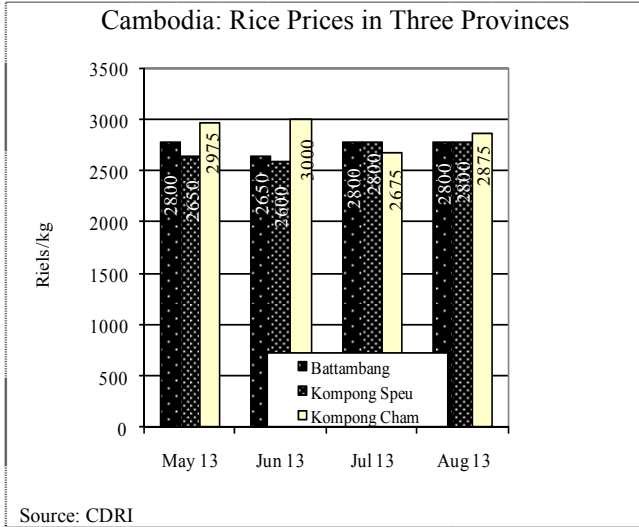
Food Prices in Kompong Speu Province
 June 2012–August 2013



Source: CDRI

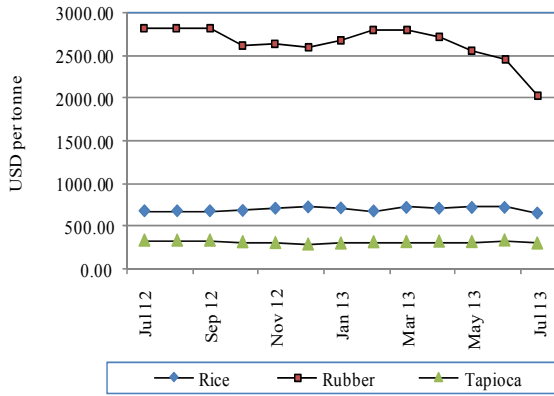
ផ្លូវដំណើរការទំនាក់ទំនងសេដ្ឋកិច្ចជាមួយប្រទេសកម្ពុជា៖ តាមមូលដ្ឋានស្តីពី

Provincial Goods Prices in Cambodia



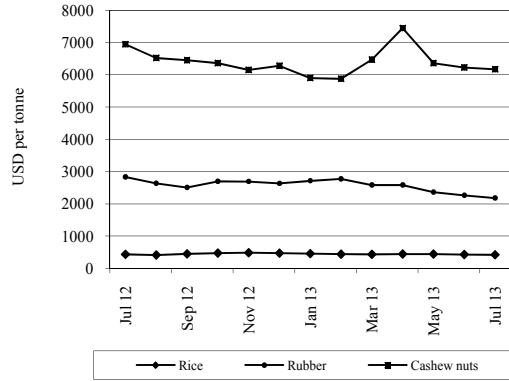
ផ្លែធឹងសិក្សា ការនាំចេញ និង ចំនួនទេសចរអន្តរជាតិទៅដល់ប្រទេសជាដៃគូរបស់កម្ពុជា
Goods Prices, Exports and International Tourist Arrivals to Partners of Cambodia

Thailand: Prices of Rubber, Rice and Tapioca
July 2012– July 2013



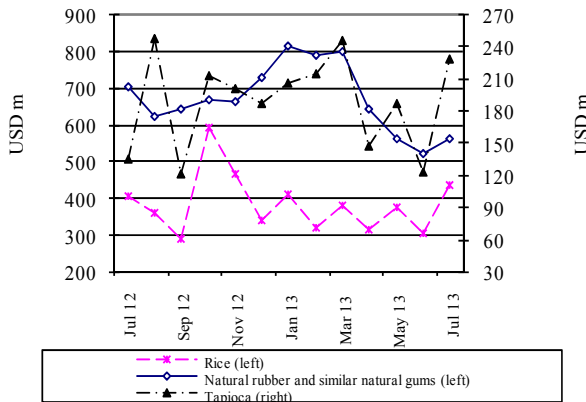
Source: Bank of Thailand, *Foreign Trade and Balance of Payments*

Vietnam: Prices of Rubber, Rice and Cashew Nuts
July 2012– July 2013



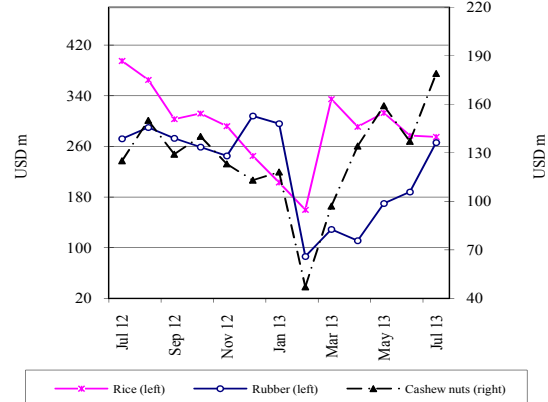
Source: General Statistics Office of Vietnam

Thailand: Exports
July 2012– July 2013



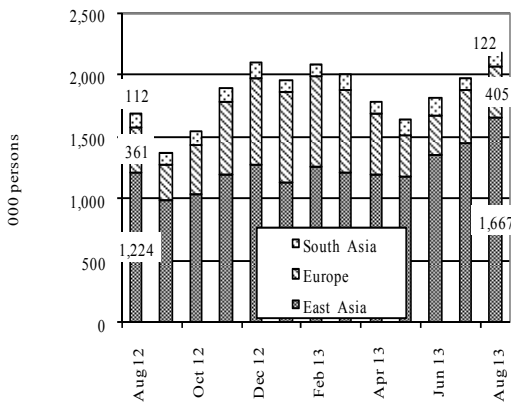
Source: Customs Department of Thailand

Vietnam: Exports
July 2012– July 2013



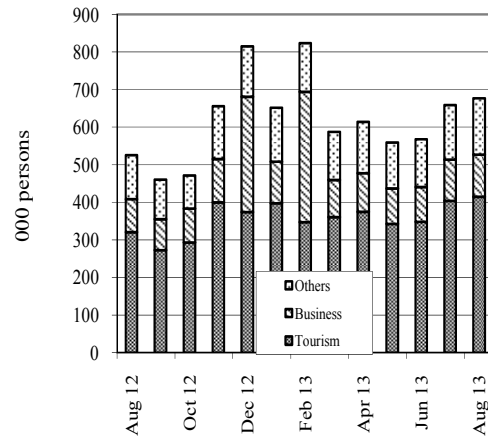
Source: General Statistics Office of Vietnam

Thailand: International Arrivals
August 2012– August 2013



Source: Thailand Office of Tourism Development

Vietnam: International Arrivals
August 2012– August 2013

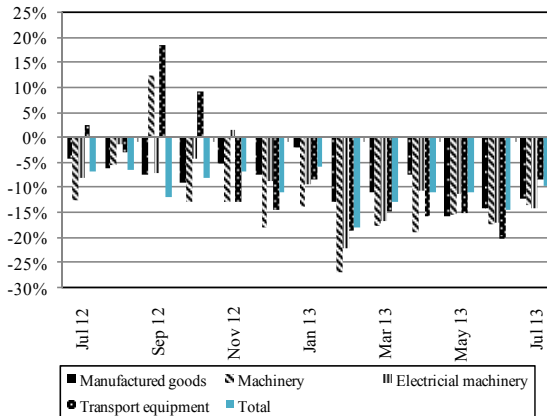


Source: Estimates by General Statistics Office of Vietnam

សកម្មភាពសេដ្ឋកិច្ច និង អត្រាអតិថិជននៅបណ្តាប្រទេសជាដៃគូរបស់កម្ពុជា

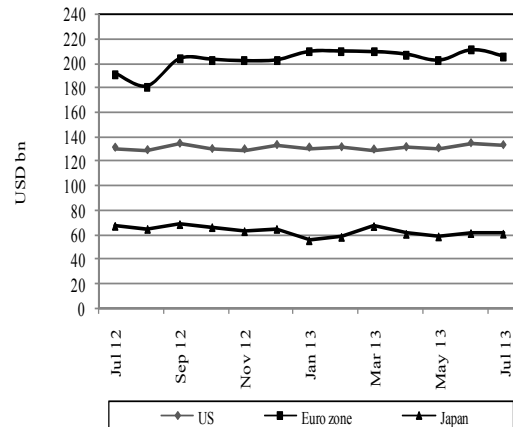
Economic Activity and Inflation Rates of Selected Economic Partners of Cambodia

Year-on-Year Growth of Main Exports: Japan
July 2012–July 2013



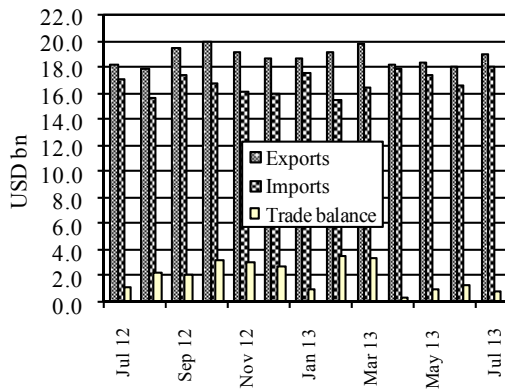
Source: Japanese Trade and Investment Statistics

Goods Exports: US, Euro Zone & Japan
July 2012– July 2013



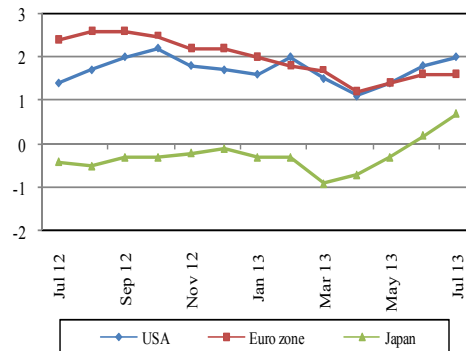
Sources: BEA, Eurostat and OECD

External Trade: Malaysia
July 2012– July 2013



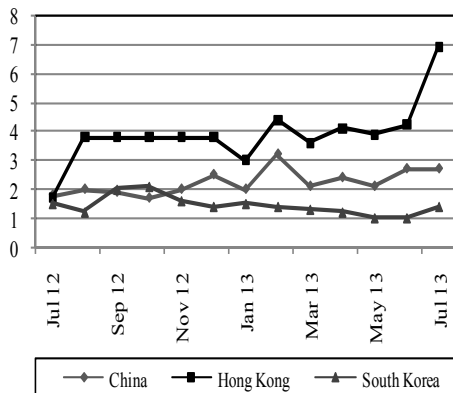
Source: Ministry of International Trade and Industry, Malaysia

Inflation Rates: US, Euro Zone & Japan
(percent price change from a year earlier)
July 2012– July 2013



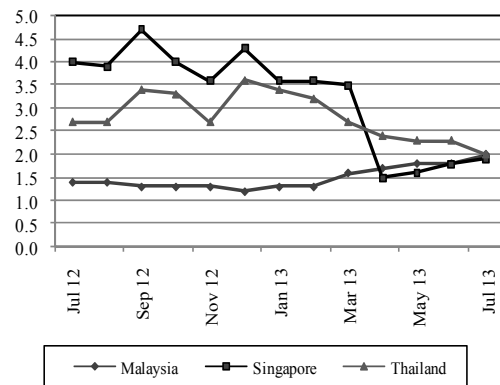
Sources: IMF and Economist (7 September 2013)

Inflation Rates: China, Hong Kong & South Korea
(percent price change from a year earlier)
July 2012– July 2013



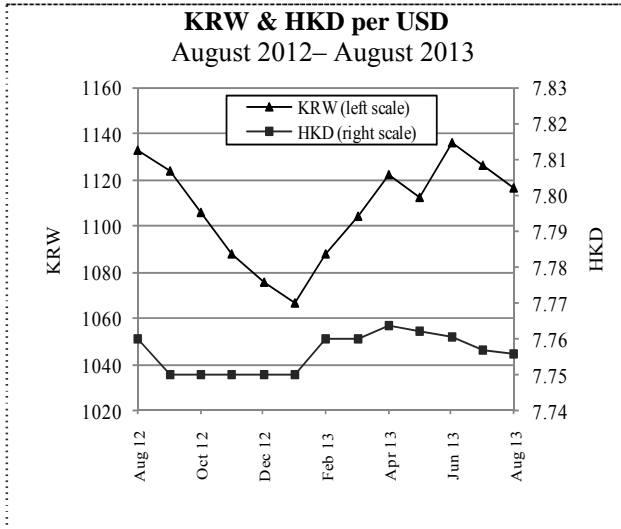
Sources: IMF and Economist (07 September 2013)

Inflation Rates: Selected ASEAN Countries
(percent price change from a year earlier)
July 2012– July 2013

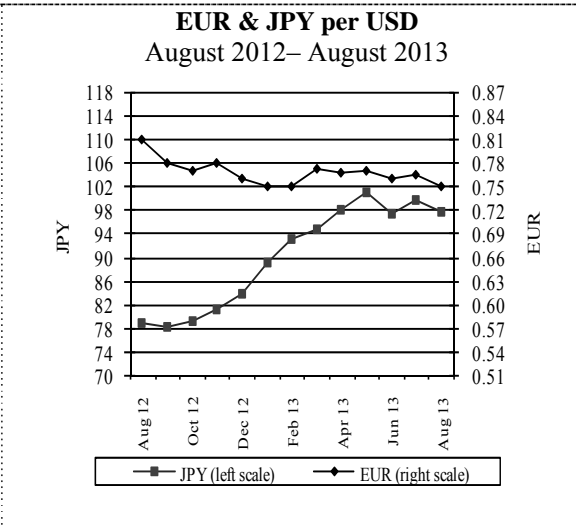


Sources: IMF and Economist (07 September 2013)

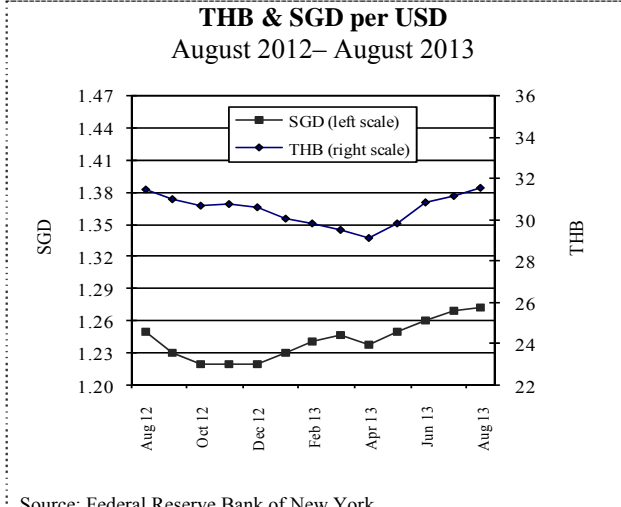
អត្រាប្តូរប្រាក់ និង ស្ថានភាពផ្ទៃដីនិព្វានលើទីផ្សារអន្តរជាតិ
Exchange Rates and Commodity Prices in World Markets



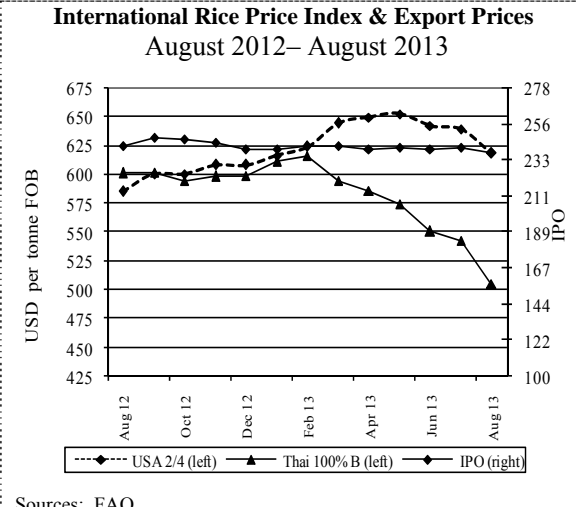
Source: Federal Reserve Bank of New York



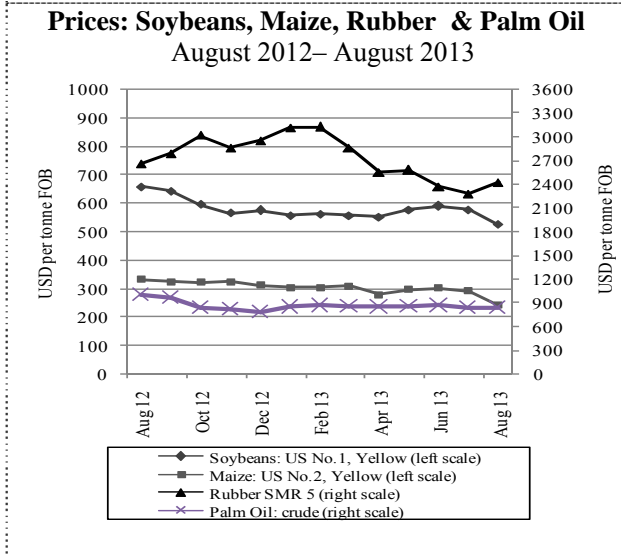
Source: Federal Reserve Bank of New York



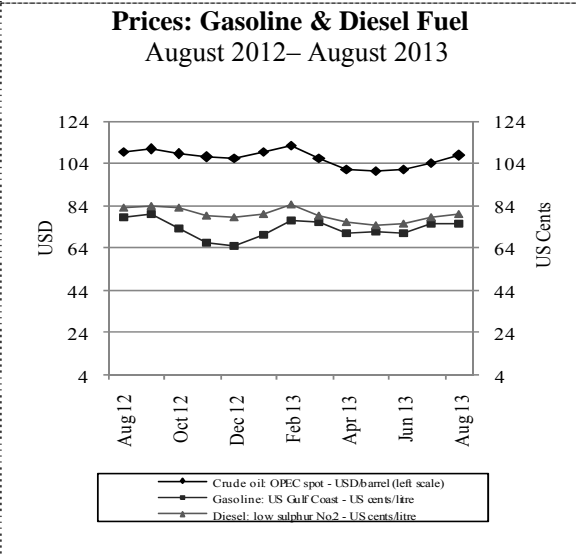
Source: Federal Reserve Bank of New York



Sources: FAO



Source: Food and Agriculture Organisation



Source: US Energy Information Administration

ឥទ្ធិពលសេដ្ឋកិច្ច
Economic News

ព័ត៌មានសេដ្ឋកិច្ចសំខាន់

ការនាំចេញសម្លៀកបំពាក់ និងផលិតផលវាយនភ័ណ្ឌ កើន 0,២% ក្នុងរយៈពេល ៧ខែដើមឆ្នាំ២០១៣។

យោងតាមទិន្នន័យក្រសួងសេដ្ឋកិច្ច និងហិរញ្ញវត្ថុ កម្ពុជាបាននាំចេញសម្លៀកបំពាក់ និងផលិតផលវាយនភ័ណ្ឌដទៃទៀត មានតម្លៃដល់ ២,៩ពាន់លានដុល្លារ ក្នុងរយៈពេល ៧ខែដើមឆ្នាំ២០១៣ ឬកើន 0,២% ធៀបនឹងឆ្នាំមុន។ កំណើនបន្តិចនេះអាចបណ្តាលមកពីភាពមិនប្រាកដប្រជា ក្រោយពីការបោះឆ្នោតថ្នាក់ជាតិ កាលពីខែកក្កដា និងកូដកម្ពុជា ញឹកញាប់ក្នុងឆ្នាំនេះ ដែលអាចធ្វើឲ្យគេពន្យារពេលវិនិយោគ និងការបញ្ចេញទិញ។

សម្លៀកបំពាក់ (គ្រប់ប្រភេទ) ស្បែកជើង និងវាយនភ័ណ្ឌដទៃទៀត រួមចំណែកដល់ ៧៨,១% នៃតម្លៃនាំចេញសរុប។ សហរដ្ឋអាមេរិក និងសហភាពអឺរ៉ុប នៅតែជាគោលដៅនាំចេញចម្បងគេ ដោយមានចំណែក ៣៩,៦% និង ៣៥,៧% នៃការនាំចេញសម្លៀកបំពាក់សរុប។ ការនាំចេញទៅប្រទេសអាស៊ានដទៃទៀត នៅមានកម្រិតទាបដែលបង្ហាញពីតម្រូវការធ្វើពិធីកម្មទីផ្សារ ដើម្បីជៀសវាងការប៉ះទង្គិចធ្ងន់ធ្ងរពីខាងក្រៅ។

ការនាំចេញសរុបក្នុងរយៈពេល ៧ខែដើមឆ្នាំ កើន ៦,៦% ធៀបនឹងឆ្នាំមុន ដល់ ៣,៨ពាន់លានដុល្លារ។ ធនាគារអភិវឌ្ឍន៍អាស៊ី រក្សាការព្យាកររបស់ខ្លួនលើអត្រាកំណើន ៧,២% សម្រាប់ឆ្នាំនេះ ដោយសារអនុវិស័យសំខាន់ៗភាគច្រើន ដំណើរការដូចការរំពឹងទុក។ ការរើបឡើងវិញនៅក្នុងទីផ្សារសហរដ្ឋអាមេរិក និងសហភាពអឺរ៉ុប ស្ថិតក្នុងចំណោមកត្តាសំខាន់ៗដែលបង្កើនការនាំចេញ។ ធនាគារអភិវឌ្ឍន៍អាស៊ីក៏មានការប្រមើលប្រកបដោយសុទិដ្ឋិនិយមសម្រាប់ឆ្នាំ២០១៤ ដែរ ដោយកំណត់ថា កំណើនប្រចាំឆ្នាំនឹងឡើងដល់ ៧,៥%។

Economic News Highlights

Exports of garments and other textile products increase 0.2 percent in first seven months

Cambodia exported USD2.9 bn worth of garments and other textile products in the first seven months of 2013, a 0.2 percent increase from a year earlier, according to data of the Ministry of Economy and Finance. The slight rise could be attributable to uncertainty resulting from the July national election and frequent strikes this year that may delay investment and orders.

Clothing (all kinds), shoes and other textiles accounted for 78.1 percent of the total export value. The US and the EU continued to be top destinations, accounting for 39.6 percent and 35.7 percent of total garment exports, respectively. Exports to other ASEAN countries are still relatively small, reflecting the need to diversify markets to avoid severe external shocks.

Total exports in the first seven months increased by 6.6 percent from a year earlier to USD3.8 bn. The Asian Development Bank maintains its projection for this year's growth at 7.2 percent because most important sub-sectors have performed as expected. Recovery in the US and EU markets is among important factors increasing exports. The ADB also has an optimistic outlook for 2014, putting annual growth at 7.5 percent.

Links to others economic news

1. “Cambodia sees 56 pct drop in cassava exports in 8 months”
(http://news.xinhuanet.com/english/business/2013-09/29/c_132761602.htm)
2. “Cambodia imports 1.1 million tons of oil in 8 months”
(http://news.xinhuanet.com/english/business/2013-09/27/c_132756600.htm)
3. “Selected Elaborations during the Presentation of the Rectangular Strategy Phase III for the First Cabinet Meeting of the Royal Government in the Fifth Legislature of the National Assembly”
(<http://cnv.org.kh/en/?p=3710>)