វិទ្យាស្ថានបណ្តុះបណ្តាល និង ស្រាវជ្រាវដើម្បីអភិវឌ្ឍន៍កម្ពុជា

Cambodia Development Resource Institute

របាយការណ៍ថ្មីៗស្តីពីសេដ្ឋកិច្ចកម្ពុជា

Flash Report on the Cambodian Economy

ឧសភា ២០០៣ / May 2003

ដោយបណ្ឌិត កង ច័ន្ទតារារ័ត្ន / Dr. Kang Chandararot

ភ្នំពេញ កម្ពុជា

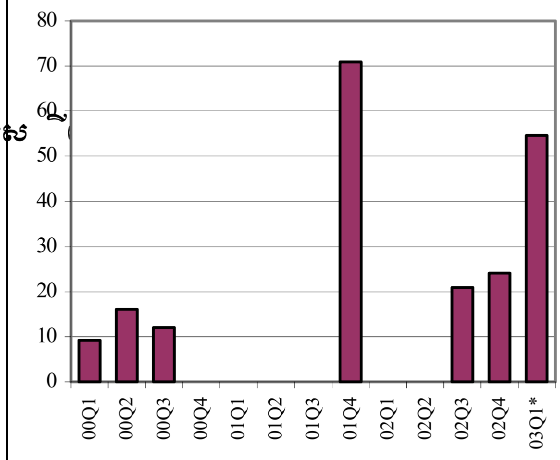
Phnom Penh, Cambodia

សកម្មភាពសេដ្ឋកិច្ចសំខាន់ៗរបស់កម្ពុជា
Main Economic Activities of Cambodia

តាំងពីឆមាស ទី២ ឆ្នាំ២០០២ ការវិនិយោគឯកជនលើវិស័យសណ្ឋាគារមានកំណើនគួរកត់សំគាល់ ។ តាម CDC នៅខែមករា-កុម្ភៈ ២០០៣ មានការវិនិយោគ ន ពិតជា ៣ ត្រីមាសទី១ វិស័យសណ្ឋាគារ ៥៥ លានដុល្លារ (៩៧%ជារបស់ វិនិយោគិនកម្ពុជា) ធៀបនឹង ២១ លានដុល្លារក្នុង ត្រីមាស

Since the second half of 2002, private investment in hotels has grown remarkably. According to the Council for the Development of Cambodia, capital worth US$ 55 million was invested in fixed assets of the hotel sector during the first quarter (up to February) of 2003, compared with US$ 21 million in the third quarter 2002. Cambodian investors took the largest portion, 97% of fixed assets approved during January-February 2003.

Private Investment in Hotels
(in million US dollars)

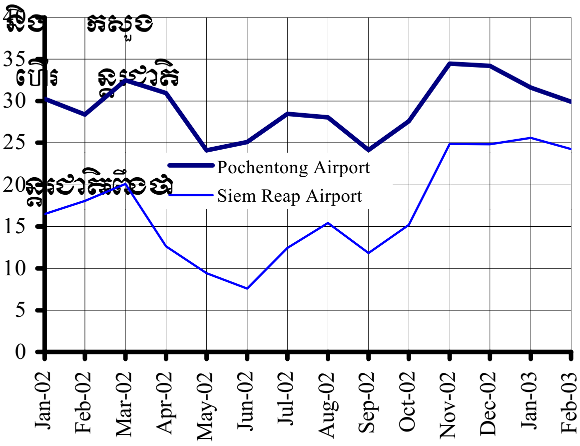


* Up to February 2003
Source: Council for the Development of Cambodia

ចំនួនភ្ញៀវអន្តរជាតិ ធ្លាក់ចុះតាំងពីខែធ្នូ ២០០២ ។ យោងតាមក្រសួងទេសចរណ៍ និងក្រសួងមហាផ្ទៃ នៅខែកុម្ភៈ មានភ្ញៀវអន្តរជាតិ ៥៤.០០០នាក់ ។ ចំនួន ៣០.០០០នាក់ តាមអាកាសយានដ្ឋានពោធិចិនតុង និង ២០.០០០នាក់ តាមអាកាសយានដ្ឋានសៀមរាប ។ ចំនួនភ្ញៀវអន្តរជាតិនឹងបន្តធ្លាក់ចុះ ដោយសារការរាតត្បាតជំងឺ

Total number of international arrivals by flights at airports, Pochentong and Siem Reap has gradually declined since December 2002. According to the Ministry of Tourism and Ministry of Interior, 54,000 persons arrived in Cambodia by international flights, 30,000 to Pochentong, and 20,000 to Siem Reap in February. The decline of international tourists is expected to continue, due to the outbreak of “SARS”.

Number of Arrivals by Int’l Flights
(in thousand persons)

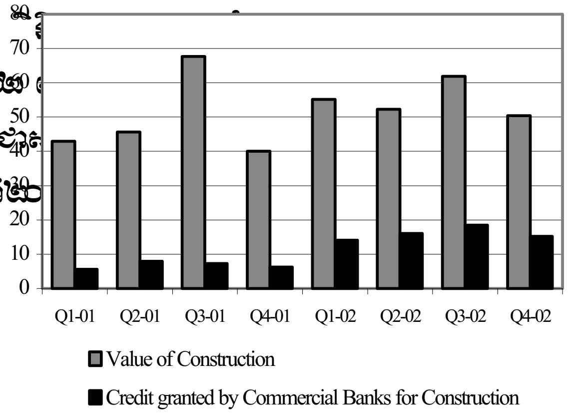


Source: Ministry of Tourism and Ministry of Interior

នៅឆ្នាំ២០០២ សកម្មភាពសាងសង់នៅកម្ពុជាបានកើនឡើងគួរកត់សំគាល់ ដោយមានតំលៃ ២២០ លានដុល្លារ ឬ ១២%ធៀបនឹងឆ្នាំ២០០១ ។ ស្របពេលនោះ ធនាគារពាណិជ្ជបានផ្តល់ឥណទានកាន់តែច្រើនដល់វិនិយោគិនសំណង់ គឺឥណទានកើនឡើងដល់ ៦៤ លានដុល្លារក្នុងឆ្នាំ២០០២ ធៀបនឹង ២៧ លានដុល្លារក្នុងឆ្នាំ២០០១ ។ ការសាងសង់ផ្ទះល្វែង នៅតែជាផ្នែកសំខាន់បំផុតក្នុងវិស័យសាងសង់ មាន ១៨០ លានដុល្លារក្នុងឆ្នាំ២០០២

Cambodia’s construction activities have expanded significantly, valuing US$ 220 million in 2002, 12% higher than in 2001. In parallel, commercial banks have provided more credit for construction investors, reaching US$ 64 million in 2002, compared with just US$ 27 million in 2001, according to the National Bank of Cambodia. Although growing more slowly than housing and other construction, apartment construction remains the most important component of construction activities, up to US$ 180 million in 2002 from $ 168 in 2001.

Value of Construction and Credit Granted by Commercial Banks for Construction
(in million US dollars)



Source: Department of Cadastre and Geography of the Municipality of Phnom Penh and National Bank of Cambodia

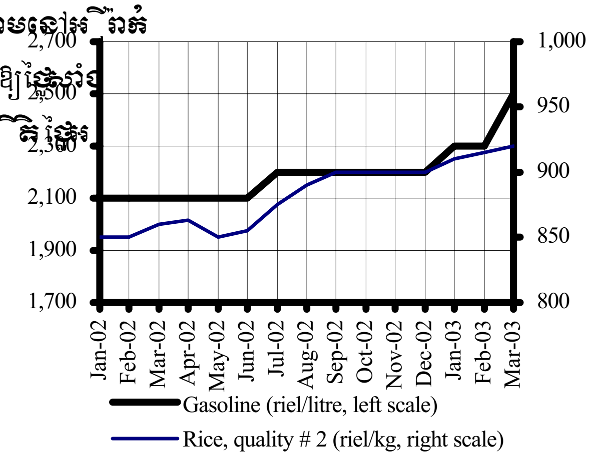
អត្រាការប្រាក់ និង ថ្លៃទំនិញ

Prices and Interest Rates Developments

នៅខែមីនា ២០០៣ ថ្លៃសាំងនៅភ្នំពេញ ឡើងដល់ ២៥០០រៀល/លីត្រ ធៀបនឹង ២៣០០រៀល/លីត្រ នៅខែកុម្ភៈ ដោយសារការបារម្ភពីសង្គ្រាមនៅអ៊ីរ៉ាក់ ការបញ្ចប់សង្គ្រាម និងកំណើនស្ថិរភាព នឹងធ្វើឱ្យថ្លៃសាំងធ្លាក់ចុះក្នុងប៉ុន្មានខែខាងមុខ។ តាមវិទ្យាស្ថានជាតិស្ថិតិ ថ្លៃអង្ករលេខពីរ កើនបន្តិចដល់ ៩២០រ/គ.ក ធៀបនឹង ៩១៥រ/គ.ក កាលពីខែកុម្ភៈ។

In March 2003, the price of gasoline in Phnom Penh jumped to 2,500 riels/litre, from 2,300 riels/litre in February. This increase was mainly due to uncertainties about the war in Iraq. The end of the war and increasing stability suggest prices should decline in the coming months. According of the National Institute of Statistics, the price of second quality rice rose slightly to 920 riels/kg, up from 915 riels/kg in February 2003.

Prices of Gasoline and Rice in Phnom Penh



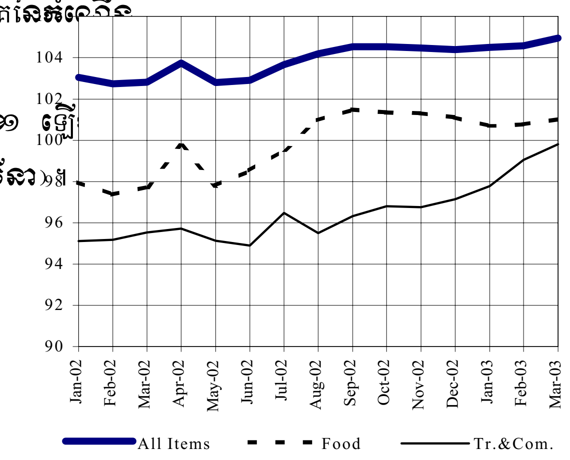
Source: National Institute of Statistics

ពីខែកុម្ភៈ-មីនា ២០០៣ ថ្លៃទំនិញប្រើប្រាស់នៅភ្នំពេញកើន ០.៣៥%។ សាំងដែលឡើងថ្លៃយ៉ាងគំហុកដល់ ៨.៦៩% គឺជាកត្តាចម្បងនៃកំណើននេះ ហើយវាធ្វើឱ្យថ្លៃដឹកជញ្ជូន និងទូរគមនាគមន៍ កើន ០.៧៦%។ ថ្លៃម្ហូបអាហារកើន ០.២៥% សំខាន់គឺដោយសារអង្ករលេខ១ ឡើង ០.៨៩% ពី ១.១៣៥រ/គ.ក ដល់ ១.១៤៥រ/គ.ក (កំណើន កុម្ភៈ-មីនា)។

Consumer prices in Phnom Penh rose for the third consecutive month, by 0.35% between February and March 2003. A jump in the price of gasoline by 8.69% was the main cause of the increase. This pushed prices of transportation and communication up by 0.76%. Prices for food rose by 0.25%, mainly due to an increase in the first quality rice price by 0.89%, to 1,145 riels/kg in March, from 1,135 riels/kg in February.

Consumer Price Index

(July-December 2000 = 100)



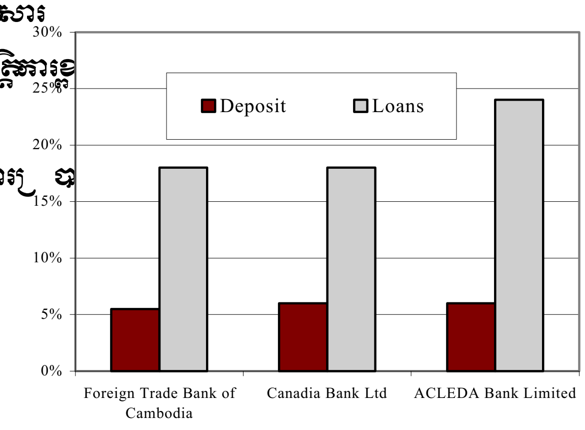
Source: National Institute of Statistics

គិតពីខែមករា ២០០៣ ក្នុងចំណោមធនាគារធំៗ ACLEDA យកការប្រាក់ខ្ពស់ជាងគេដល់ ២៤% ក្នុងមួយឆ្នាំ ACLEDA ដោយសារផ្តល់ឥណទានតូចៗ ដែលមានហានិភ័យនិងចំណាយប្រតិបត្តិការខ្ពស់ជាងធម្មតា។ ធនាគារពាណិជ្ជក្រៅប្រទេស និង Canadia យកការប្រាក់ ១៨% ដូចគ្នា តែជាដុល្លារ ប៉ុន្តែផ្តល់ការប្រាក់ ៦% និង ៥.៥% ក្នុងមួយឆ្នាំ បញ្ញើជាដុល្លារ។

As of January 2003, amongst three leading banks, ACLEDA charges the highest interest rate on loans in US dollars, an annual rate of 24%. But this should be expected because ACLEDA's smaller loans are more risky and have higher transaction costs than traditional lending. Canadia Bank and Foreign Trade Bank charges the same interest rates (18%) for credit in US dollar, giving however, different rates for deposits in dollar, 6%, and 5.5%, respectively.

Loan and Deposit Interest Rate in dollars

(As of January 2003)



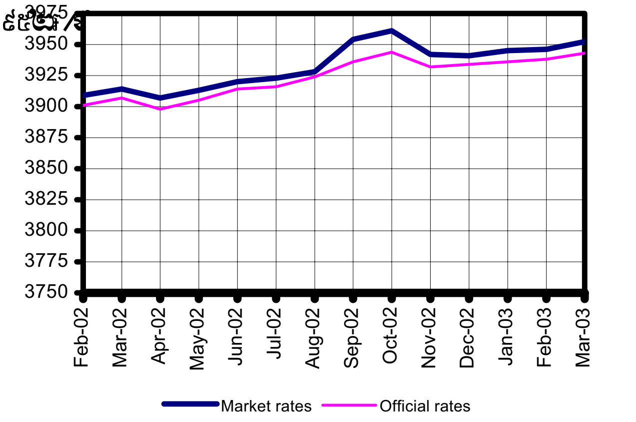
Source: Foreign Trade Bank, Canadia Bank and ACLEDA bank

ស្ថានភាពអត្រាប្តូរប្រាក់និងរូបិយវត្ថុ
Exchange Rate and Monetary Developments

តាំងពីដើមឆ្នាំ២០០៣ មក ប្រាក់រៀល មាននិន្នាការចុះខ្សោយធៀបនឹងដុល្លារ ។ នៅខែមីនា ២០០៣ អត្រាប្តូរនៅលើផ្សារគឺ ៣.៩៥២រ/ដុល្លារ ធៀបនឹងអត្រា ៣.៩៤៦រ/ដុល្លារ ក្នុងខែកុម្ភៈ ។ ធៀបនឹងខែមីនា ២០០២ ប្រាក់រៀល បានចុះថ្លៃ០.៩៧%ធៀបនឹងដុល្លារ ។

The Cambodian riel continued to weaken against the US dollar, as has been the trend since the beginning of 2003. In March 2003, the US dollar was priced on the market at 3,952 riels/dollar, compared with 3,946 riels/dollar in February. Compared to the same month last year, the riel depreciated by 0.97% against the dollar.

Cambodian Riels per US Dollar
(market and official rates)

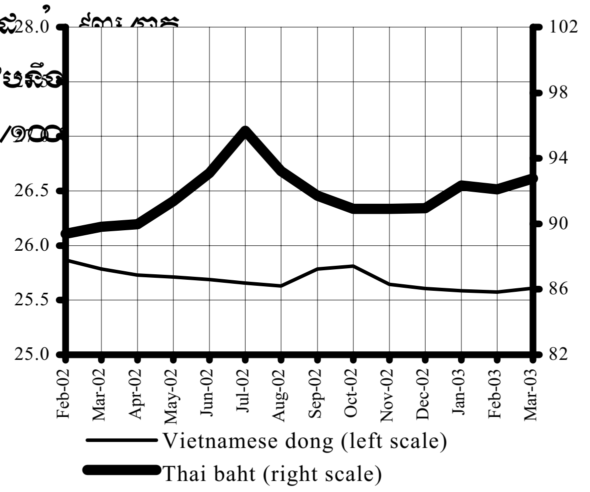


Source: National Bank of Cambodia

នៅខែមីនា ២០០៣ ប្រាក់រៀល បានចុះខ្សោយធៀបនឹង ប្រាក់បាតថៃ និងប្រាក់ដុងវៀតណាម ។ នៅខែមីនា ប្រាក់បាតឡើងដល់ ៩៣រៀល ធៀបនឹង ៩២រ/បាត ក្នុងខែកុម្ភៈ (ឬឡើងថ្លៃ ៣.៣%បើធៀបនឹងខែមីនា ២០០២)។ ប្រាក់ដុងឡើងថ្លៃបន្តិចបន្តួចដល់ ២៥.៦១រ/១០០ដុង ធៀបនឹង ២៥.៥៧រ/១០០ដុងនៅខែកុម្ភៈ ។

The riel weakened against the Thai baht and Vietnamese dong in March 2003. The value of the baht rose to 93 riels/baht, from 92 riels/baht in February. Compared to March last year, the riel depreciated by 3.3% against the baht. The Vietnamese dong gained marginally against the riel, trading at 25.61 riels/100 dongs in March, up from 25.57 riels/100 dongs in February.

Cambodian Riels per Thai Baht and 100 Vietnamese Dong

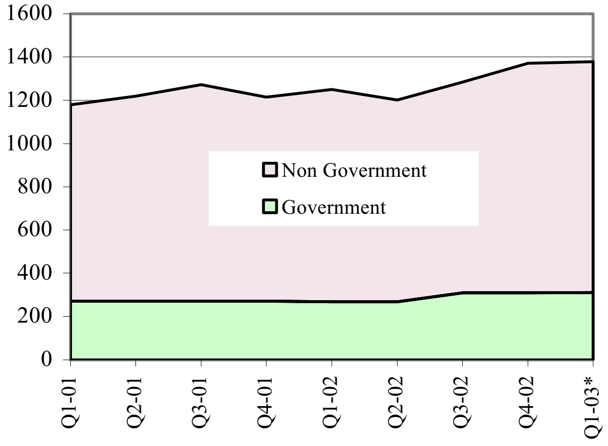


Source: FEER

នៅចុងខែកុម្ភៈ ២០០៣ ប្រព័ន្ធធនាគារក្នុងស្រុក មានឥណទានក្នុងស្រុកដែលគេផ្តល់ជាសរុប ១.៣៧៨ពាន់លានរៀល (ស្មើនឹង ៣៥០ លានដុល្លារ) ។ ជាទូទៅ ឥណទានក្នុងស្រុក ២៣%ផ្តល់ទៅឱ្យរដ្ឋាភិបាល ហើយ ៧៧%ទៀត (ស្មើនឹងប្រមាណ ២៦៥.៥ លានដុល្លារ) ផ្តល់ទៅឱ្យវិស័យឯកជន ។

By the end of February 2003, Cambodia's banking system had outstanding domestic credit worth 1,378 billion riels, equivalent to US$ 350 million. In general, 23% of domestic credit has been provided to the government, and the remaining 77% of US$ 350 million, that is about US$ 265.5 million to the private sector.

Domestic Credit in Cambodia
(in billion riels)



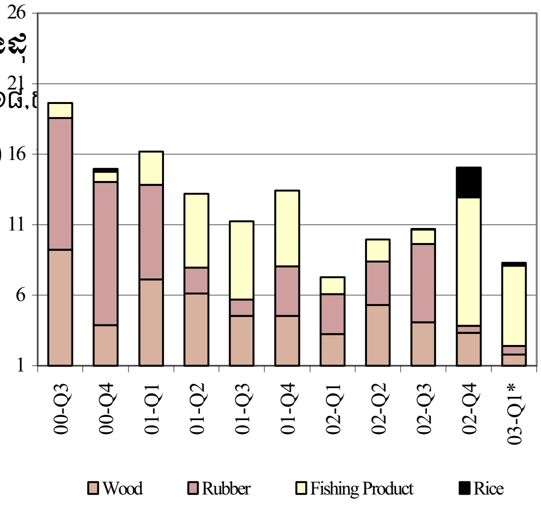
* Up to February 2003
Source: National Bank of Cambodia

ពាណិជ្ជកម្មក្រៅប្រទេស
External Trade

ក្នុងឆ្នាំ២០០២ ការនាំចេញផលិតផលកសិកម្មបានកើនជារៀងរាល់ត្រីមាស ប៉ុន្តែតំលៃនាំចេញសរុបបានតែ៤៣ លានដុល្លារ ឬ ២០,៤% ទាបជាង ២០០១។ ឈើនាំចេញធ្លាក់ចុះគួរកត់សំគាល់ (ចុះ ២៨,៤%) ពី២២,៣ លានដុល្លារ មកត្រឹម ១៦ លានដុល្លារនៅឆ្នាំ២០០២ ត្រីនាំចេញធ្លាក់ចុះ ពី ១៨,៥ មកត្រឹម ១២,៩ លានដុល្លារ, ហើយកៅស៊ូនាំចេញធ្លាក់ពី ១៣,៣ មកត្រឹម ១២ លានដុល្លារ។

Exports of main agricultural products grew quarter by quarter during 2002. However, total export value reached just US$ 43 million for the year, 20.4% less than in 2001. Exports of wood dropped significantly by 28.4%, from US$ 22.3 million to US$ 16 million. The value of fish products exported declined to US$ 12.9 million in 2002, down from US$ 18.5 million. Exports of rubber have fallen slightly from US$ 13.3 million to US$ 12 million. Fish export data do not reflect seasonal realities (low exports during peak period, high exports during non-peak periods).

Exports of Main Agricultural Products
(in million US dollars)

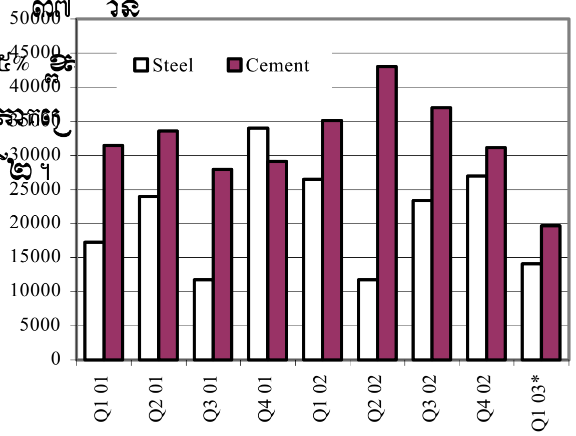


* Up to February 2003
Source: Customs and Excise Department

ពីខែមករា-កុម្ភៈ ២០០៣ កម្ពុជាបាននាំចូលស៊ីម៉ង់ត៍ ៥ លានដុល្លារ និងដែក ៣,៦ លានដុល្លារ។ នៅឆ្នាំ២០០២ ការនាំចូលស៊ីម៉ង់ត៍ឡើងដល់ ៣៧ លានដុល្លារ និងដែកឡើងដល់ ២៣ លានដុល្លារ ឬ ១៩% និង ៥% ខ្ពស់ជាងឆ្នាំ២០០១។ និន្នាការកន្លងមកបង្ហាញថា ក្នុងមួយឆ្នាំៗ ស៊ីម៉ង់ត៍ត្រូវនាំចូលនៅឆមាសទី១ រីឯដែកភាគច្រើននាំចូលនៅឆមាសទី២។

During January-February 2003, Cambodia imported cement and steel worth US$ 5 million and US$ 3.6 million, respectively. In 2002, imports of cement reached US$ 37 million, 19% more than 2001, and imports of steel US$ 23 million, 5% more than 2001. The past trend indicates that more cement is imported during the first half of the year, while more steel is imported during the second half of the year.

Value of Construction Materials
(in million riels)

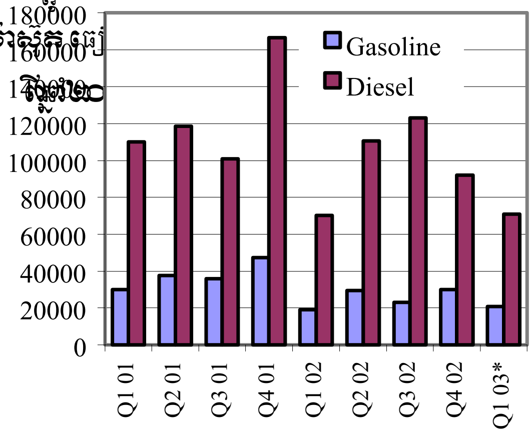


* Up to February 2003
Source: Customs and Excise Department

តាមអគ្គនាយកដ្ឋានគយ និងរដ្ឋាករ នៅខែមករា-កុម្ភៈ ២០០៣ កម្ពុជានាំចូលសាំង ៥ លានដុល្លារ និង ម៉ាស៊ូត ១៨ លានដុល្លារ។ នៅឆ្នាំ២០០២ កម្ពុជាបានចំណាយ ៩០ លានដុល្លារលើសាំង និង ២៣០ លានដុល្លារលើម៉ាស៊ូត ធៀបនឹង ៧២ លានដុល្លារលើសាំង និង ២០០ លានដុល្លារលើម៉ាស៊ូតនៅឆ្នាំ២០០១។

According to the Customs and Excise Department, Cambodia imported gasoline and diesel worth US$ 5 million and US$ 18 million, respectively, during January-February 2003. In 2002, Cambodia spent US$ 90 million and US$ 230 million on gasoline and diesel, respectively. In 2001, US$ 72 million was spent on gasoline, and US$ 200 million on diesel.

Value of Imports on Energy
(in million riels)



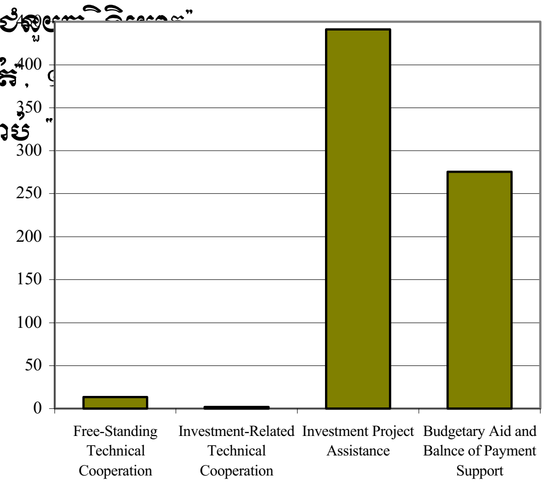
* Up to February 2003
Source: Customs and Excise Department

ប្រភពនិងការប្រើប្រាស់ជំនួយបរទេស
Sources and Uses of Foreign Assistance

តាមគេហទំព័រCDC ឆ្នាំ១៩៩២-២០០១ កម្ពុជាបានទ ទ ួ ការបើកផ្ត ល់ កលណទ ាន ៧៣២ ានដុ ្លារក្នុងនេ ៦០.២%សំរាប់ "គំរោងជំនួយ..." ៣៧.៦%ជា "ជំនួយ ទ ុ ទ ថវិកា និងជញ្ជីញ ទ ុទ ាត់..." ុ បរិបក្តិការបច្ចេកទេ សមិនភ់ាណស់មុខសញ្ញា" និង ០.៣%សំរាប់ "បក្តិការបច្ចេកទេ សទ ាក់ទ ិនទឹងទ ិនិយោគ" ។

According to the Council for the Development of Cambodia, loans worth US$ 732 million were disbursed to Cambodia from 1992 to 2001. Of this, 60.2% were devoted to "Investment Project Assistance", 37.6% to "Budgetary Aid and Balance of Payment", 1.9% to "Free-Standing Technical Cooperation", and 0.3% to "Investment-Related Technical Cooperation".

Loans by Type of Assistance 1992-2001
(in million US dollars)

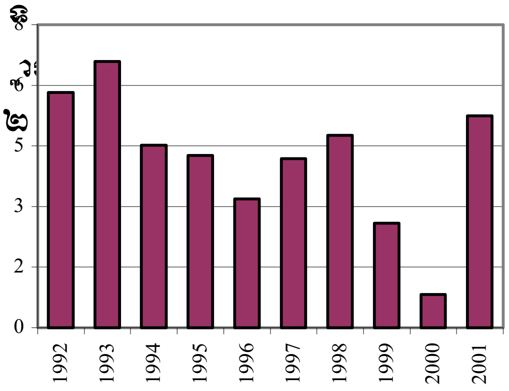


Source: Council for the Development of Cambodia

ទ ាក់ទ ិនទឹងជំនួយទ ្វភាគី ុ បទេ សកាណាដាបានផ្ត ល់ជំនួយអាស់ ដុ ្លារដ ល់កម្ពុជា ឆ្នាំ១៩៩២-២០០១ ។នៅឆ្នាំ២០០១ កម្ពុជា ទ ទ ... ស ំណោយ៥ ានដុ ្លារពីកាណាដា ក្នុងនេ ២.៦ ានដុ ្លារ... មនុស្សធម៌, ជំនួយស្ង្គ្រោះ... បន្ទាន់ និងជំនួយស ្បៀង, និង ២ ... "ទ ិស័យអ ិវឌ្ឍន៍" ។

With reference to the bilateral assistance of various donors to Cambodia, Canada disbursed aid to Cambodia worth US$ 42 million from 1992 to 2001. In 2001, Cambodia received US$ 5 million grant from Canada. Of this money, the largest portion was directed for "Humanitarian, Relief and Food Aid", with US$ 2.6 million, and for "Area Development", with US$ 2 million.

Canadian Aid to Cambodia
(in million US dollars)

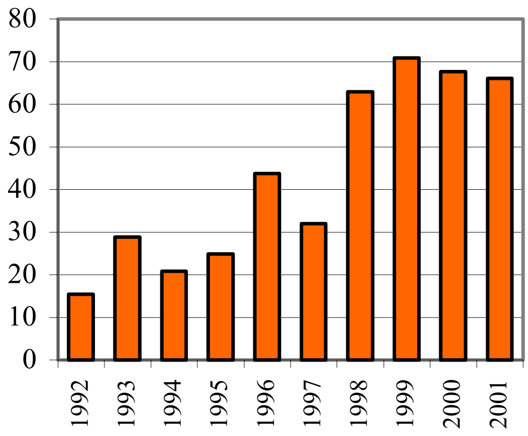


Source: Council for the Development of Cambodia

តាមគេហទំព័រCDC មានជំនួយ ៤៣៣ ានដុ ្លារត្រូវបានផ្តល់ សំរាប់ "ទ ិស័យសុខាភិបាល" នៅកម្ពុជា ក្នុងនេ មួយភាគធំផ្តល់ ឱ្យក្រោយឆ្នាំ១៩៩៨ ។ នៅឆ្នាំ២០០១ ទ ិស័យសុខាភិបាល ទ ទួ ជំនួយ ៦៦ ានដុ ្លារ ក្នុងនេ ៥២ ានដុ ្លារជាអ ំណោយនិង ១៤ ានដុ ្លារជាកម្ចី ។

According to the Council for the Development of Cambodia, aid worth US$ 433 million was disbursed for "Health" in Cambodia. Most of the money was provided after 1998. In 2001, Cambodia's "Health Sector" received US$ 66 million in aid, of which US$ 52 million was grant money, and US$ 14 million was in loans.

Aid Disbursement for Health
(in million US dollars)



Source: Council for the Development of Cambodia

ការអនុវត្តន៍ថវិកាជាតិ

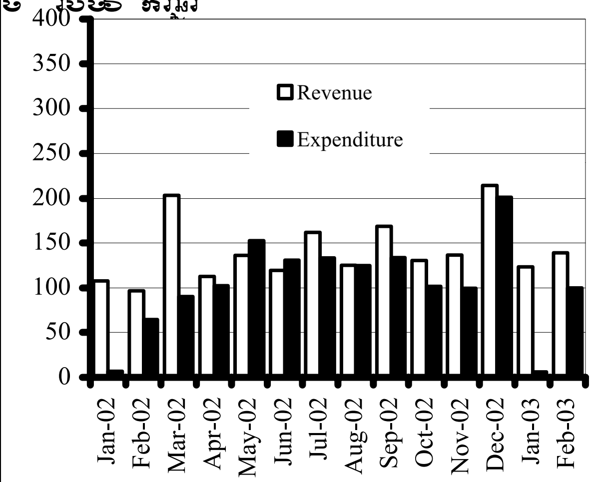
National Budget Operations

ដូចគ្នា ពីដើមឆ្នាំ២០០២ដែរ នៅខែមករា-កុម្ភៈ ២០០៣ ថវិកាចរន្តរបស់ កម្ពុជាមានអតិរេក ១៥៦ពាន់ លានរៀល ។ ប៉ុន្តែតាមច្បាប់ថវិកាឆ្នាំ ២០០៣ ថវិកាចរន្តត្រូវ មានអតិរេក២១៥ពាន់ លានរៀល ។

Similar to the beginning of 2002, Cambodia's current budget has been in surplus in January-February 2003. During this period the surplus amounted to 156 billion riels. According to the Budget Law 2003, however, the current budget should have a surplus of 215 billion riels.

Current Budget Operations

(commitments-in billion riels)



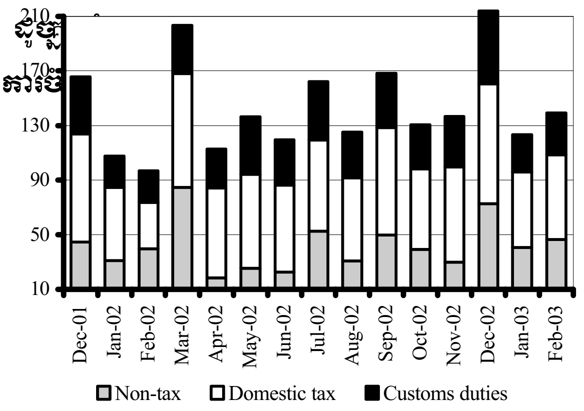
Source: Ministry of Economy and Finance

ពីមករា-កុម្ភៈ ២០០៣ ចំណូល ថវិកាចរន្ត បាន ២៦២ពាន់ លានរៀល គឺមាន ១១៧ពាន់ លានជាពន្ធក្នុងស្រុក, ៥៨ពាន់ លានជាពន្ធគយ និង ៨៧ពាន់ លានជាចំណូល មិនមែនពន្ធ ។ ធៀបនឹងរយៈពេល ដូចគ្នា... ចំណូល ថវិកាកើនបន្តិច ប៉ុន្តែបានត្រឹម ១៣%នៃផែនការថវិកា... បរិហ ជាបានកំណត់ខ្ពស់ហួសហេតុ ។

Current budget revenue has grown from January to February 2003, accumulating to 262 billion riels: 117 billion riels from domestic tax, 58 billion riels from customs duties, and 87 billion riels from non-tax revenue. Compared with the same period last year, budget revenue has slightly increased, but it remains only 13% of the budget law revenue target. Based on historical data, revenue targets have been unrealistically high, which tends to make comparisons between actual revenue and targets not very meaningful.

Current Budget Revenue

(in billion riels)



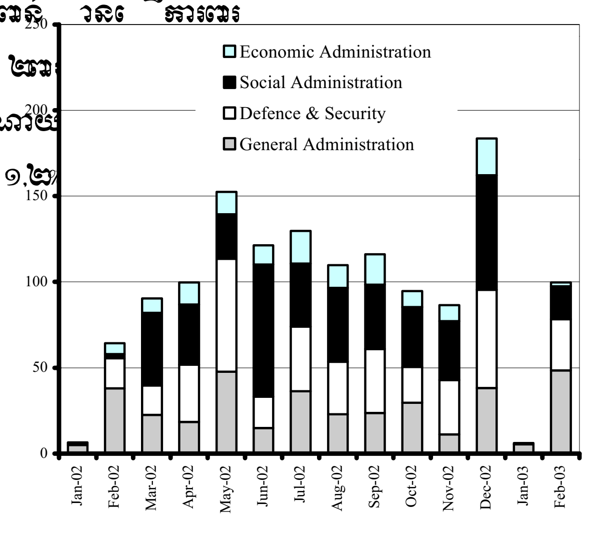
Source: Ministry of Economy and Finance

ពីមករា-កុម្ភៈ ២០០៣ ចំណាយថវិកាចរន្តបាន ១០៦ពាន់ លានរៀល ក្នុងនេះ ៥៤ពាន់ លានចំណាយលើរដ្ឋបាលទូទៅ, ៣១ពាន់ លានលើការពារជាតិនិងសន្តិសុខ, ១៩ពាន់ លានលើរដ្ឋបាល សង្គមកិច្ច និង ២... រដ្ឋបាល សេដ្ឋកិច្ច ។ ក្នុងចំណោមមុខចំណាយទាំង ៤ ចំណាយ... សេដ្ឋកិច្ច អនុវត្តបានទាបជាងគេបំផុត គឺបានត្រឹម ១,២%... ប៉ុណ្ណោះ ។

During January-February 2003, current budget expenditures were 106 billion riels. Of this, 54 billion riels were spent for General Administration, 31 billion riels for Defence & Security, 19 billion riels for Social Administration, and 2 billion riels for Economic Administration. Among these four categories of public expenditures, the lowest implementation is in spending for Economic Administration, just 1.2% of the target.

Current Budget Expenditures

(commitments – in billion riels)



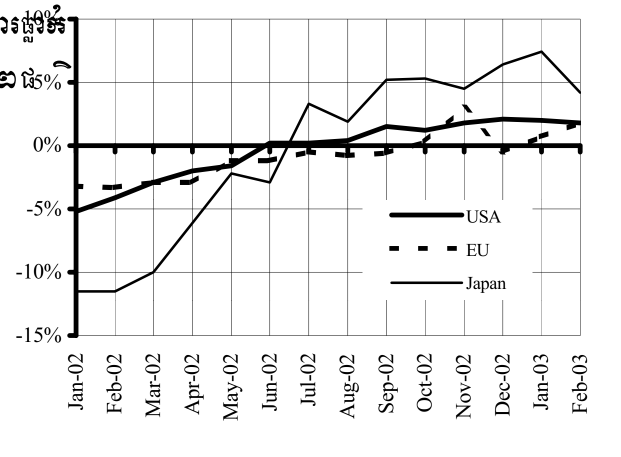
Source: Ministry of Economy and Finance

សកម្មភាពសេដ្ឋកិច្ចនៃបណ្តាប្រទេសជាដៃគូរបស់កម្ពុជា
Economic Activity of Selected Economic Partners of Cambodia

នៅខែកុម្ភៈ ២០០៣ នៅ US មានការធ្លាក់ចុះផលិតកម្មឧស្សាហកម្ម (ក្រោយពេល មានកំណើននៅខែមករា) គឺ ០,១% បើធៀបនឹងខែមករា ។ តាមធនាគារកណ្តាល US ការធ្លាក់ចុះនេះ គឺការធ្លាក់ចុះសកម្មភាពសាងសង់ ០,៤% ។ ធៀបនឹងខែកុម្ភៈ ២០០២ ផលិតកម្មឧស្សាហកម្មនៅ US កើន ១,៨%, នៅតំបន់អឺរ៉ូកើន ១,៨% និងនៅជប៉ុនកើន ៤,២% ។

In February 2003, the US experienced a fall in industrial production, after enjoying a rise in January. Compared to January 2003, US industrial output shrank by 0.1%. According to the Federal Reserve, the main reason was a slump in construction activities, by 0.4%. Compared to February last year, however, industrial production in US rose by 1.8%, in the Euro Area by 1.8%, and in Japan by 4.2%.

Industrial Production in the US, Europe and Japan
(percentage change over the previous year)

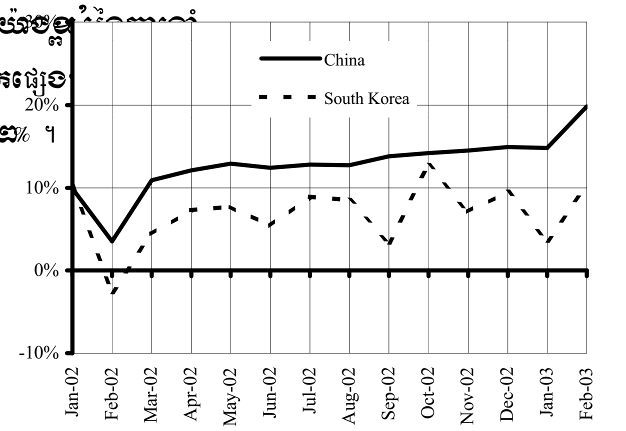


Source: IMF and the Economist

ក្នុងរយៈ ១២ខែ ដល់ខែកុម្ភៈ ២០០៣ ផលិតកម្មឧស្សាហកម្មចិន មានកំណើន ១៩,៨% ដែលត្រូវបានជំរុញយ៉ាងខ្លាំងពីការវិនិយោគលើហេដ្ឋារចនាសម្ព័ន្ធរបស់រដ្ឋាភិបាល, កំណើនយ៉ាងខ្ពស់នៃការនាំចេញ, និងការបន្តវិនិយោគក្នុងស្រុកទៅលើរោងចក្រ ។ ក្នុងរយៈពេលដដែល ផលិតកម្មឧស្សាហកម្មកូរ៉េខាងត្បូងកើន ១០,២% ។

China's industrial production climbed by 19.8% during the 12-month period ending in February 2003. The increase has been strongly stimulated by the government's investment in infrastructure, high growth in exports and continuing domestic investment in factories. During the same period, South Korea's industrial production rose by 10.2%.

Industrial Production in China and South Korea
(percentage change over the previous year)

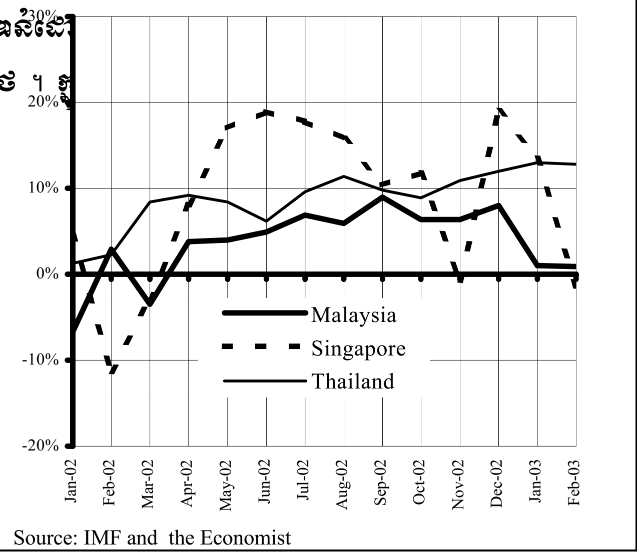


Source: IMF and the Economist

នៅខែកុម្ភៈ ២០០៣ ផលិតកម្មឧស្សាហកម្មសិង្ហបុរីធ្លាក់ចុះ ១.៤% បើធៀបនឹងខែកុម្ភៈ ឆ្នាំមុន ។ តាមក្រុមប្រឹក្សាអភិវឌ្ឍន៍សេដ្ឋកិច្ចសិង្ហបុរី ការធ្លាក់ចុះផលិតកម្មឧស្សាហកម្មសិង្ហបុរី កើតឡើងជាសំខាន់ដោយការធ្លាក់ចុះយ៉ាងខ្លាំងដល់ទៅ ៣៣,៣% នៃផលិតកម្មឱសថ ។ ក្នុងរយៈពេលដដែល ផលិតកម្មឧស្សាហកម្មនៅថៃកើន ១២,៨% និងនៅម៉ាឡេស៊ីកើន ០,៩% តាមការផ្សាយនៃទស្សនាវដ្ដី Economist ។

In February 2003, Singaporean industrial production fell by 1.4%, compared to the same month last year. According to Singapore Economic Development Board, the fall in industrial output was primarily due to a sharp decline in production of pharmaceuticals, by 33.3%. During the same period, industrial production in Thailand rose by 12.8%, and in Malaysia by 0.9%, according to the Economist.

Industrial Production in Selected ASEAN Countries
(percentage change over the previous year)



Source: IMF and the Economist

ស្ថានភាពអតិផរណានៃបណ្តាប្រទេសជាដៃគូរបស់កម្ពុជា

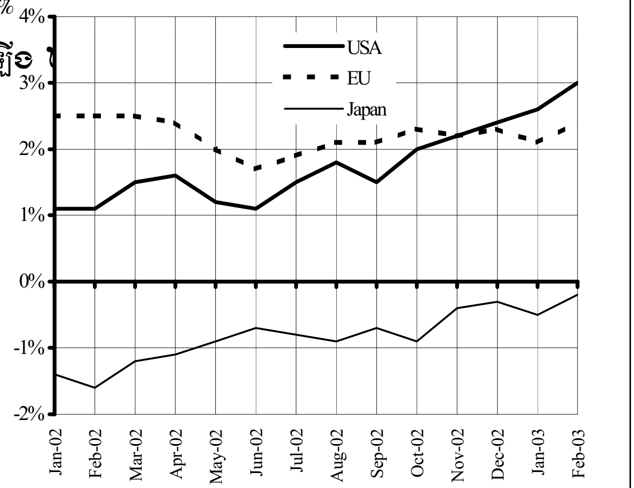
Inflation rates in Selected Economic Partners of Cambodia

នៅខែកុម្ភៈ ២០០៣ ថ្លៃទំនិញប្រើប្រាស់នៅ US កើន ០,៦% ធៀបនឹងខែមករា ។ ធៀបនឹងខែកុម្ភៈ ឆ្នាំមុន អតិផរណានៅ US មានកំណើន ៣,០% ។ មូលហេតុចំបងនៃកំណើននេះ គឺ ថ្លៃថាមពល បានស្ទុះឡើង ... ក្នុងរយៈពេល ដដែល ថ្លៃទំនិញប្រើប្រាស់នៅតំបន់អឺរ៉ូកើន ២,៤% ឯនៅជប៉ុនបានធ្លាក់ចុះ ០,២% ។

In February 2003, consumer prices in the US were 0.6% higher than in January. Compared to the same month last year, US inflation is up by 3.0%. The main reason for the rise has been a jump in energy prices, by 22.0%, according to US Bureau of Labor Statistics. During the same period, consumer prices in the Euro Area rose by 2.4%, while those in Japan fell by 0.2%.

Inflation Rate in the US, Europe and Japan

(percentage change over the previous year)



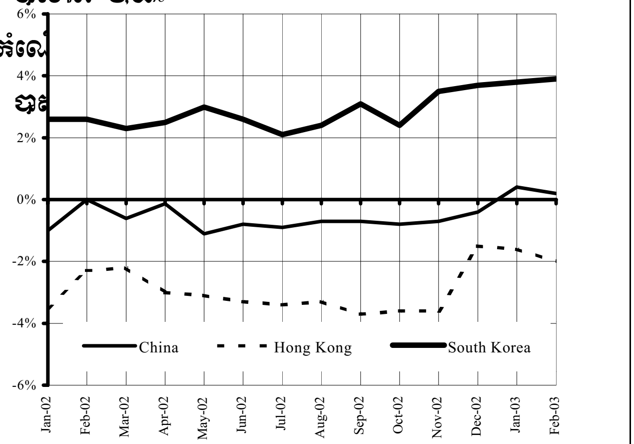
Sources: IMF and the Economist

ពីខែមករា-កុម្ភៈ ២០០៣ ថ្លៃទំនិញប្រើប្រាស់នៅចិន កើន ០,៩% ។ បើធៀបនឹងខែកុម្ភៈ ២០០២ ចិនមានកំណើនថ្លៃទំនិញប្រើប្រាស់តែ ០,២% ប៉ុណ្ណោះ ។ ក្នុងរយៈពេល ដដែល កូរ៉េខាងត្បូងមានកំណើ... ៣,៩%, ឯហុងកុងបន្តមានបរិត្តផរណាដោយថ្លៃទំនិញប្រើប្រាស់ បាន... ២,០% ។

According to China’s National Bureau of Statistics, consumer prices rose by 0.9% during January-February 2003. Compared to February last year, however, China experienced just a 0.2% price increase. During the same period, South Korea saw its inflation rate rise to 3.9%, while Hong Kong continued to suffer deflation with a 2.0% fall in consumer prices.

Inflation Rate in China, Hong Kong and South Korea

(percentage change over the previous year)



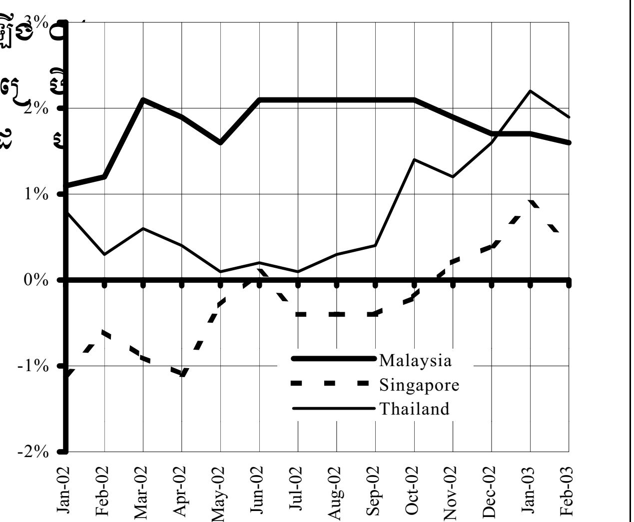
Sources: IMF, FEER, AWJ and the Economist

នៅខែកុម្ភៈ២០០៣ ថ្លៃទំនិញប្រើប្រាស់នៅសិង្ហបុរីធ្លាក់ចុះ ០,២% ធៀបនឹងខែមករា ប៉ុន្តែបើធៀបនឹងកាលពីមួយឆ្នាំមុន វាបានកើនឡើង ... តាមព័ត៌មានពី នាយកដ្ឋានស្ថិតិសិង្ហបុរី កំណើនថ្លៃទំនិញប្រើប្រាស់ ... ឡើងជាសំខាន់ដោយសារ កំណើនថ្លៃការ ... សុខភាព (ដែល ... ដោយសារឱសថឡើងថ្លៃ) ។ ក្នុងរយៈពេល ដដែល អត្រាអតិផរណានៅម៉ាឡេស៊ីនៅនឹងថ្កល់ គឺ ១,៦% រីឯនៅថៃ វាធ្លាក់ដល់ ១,៩% ។

In February 2003, consumer prices in Singapore fell by 0.2% over January. Compared to one year ago however, prices are up by 0.4%. According to Singapore's Department of Statistics, higher consumer prices were mainly due to higher health care cost, which were caused by dearer proprietary medicines. During the same period, the inflation rate in Malaysia remained at 1.6%, while that in Thailand fell to 1.9%.

Inflation Rate in Selected ASEAN Countries

(percentage change over the previous year)



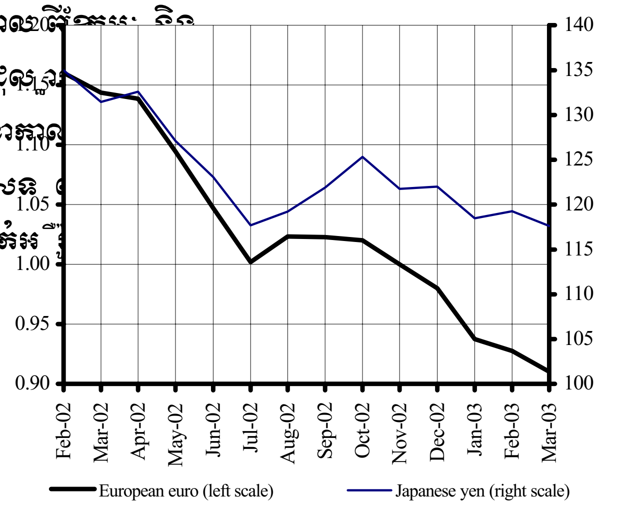
Sources: IMF and the Economist

អត្រាប្តូរប្រាក់លើទីផ្សារអន្តរជាតិ
Exchange Rate in the World Markets

នៅខែមីនា ២០០៣ ដុល្លារបានធ្លាក់ថ្លៃ លើ នឹងរូបិយប័ណ្ណ ធំៗ ដោយមាន អឺរ៉ូ តម្លៃ ០.៩១អឺរ៉ូ/ដុល្លារ ធៀបនឹង ០.៩៣អឺរ៉ូ/ដុល្លារកាលពីខែកុម្ភៈ និង យ៉េន តម្លៃ ១១៧.៦យ៉េន/ដុល្លារ ធៀបនឹង ១១៩.៣យ៉េន/ដុល្លារ ខែកុម្ភៈ ។ សង្គ្រាមនៅអ៊ីរ៉ាក់ និងភាពមិនច្បាស់លាស់នាគ្រា នោះ មានសង្គ្រាម បណ្តាល ឱ្យដុល្លារចុះ ខ្សោយជាពិសេសធៀប ដែលធ្វើឱ្យអឺរ៉ូ តម្លៃធ្លាក់ទាបបំផុតពីការបង្កើតនោះ កើតឡើង ប្តូរអឺរ៉ូ

In March 2003, the US dollar lost its value against main currencies, trading at 0.91 Euro/dollar, down from 0.93 Euro/dollar in February, and at 117.6 yen/dollar, down from 119.3 yen/dollar in February. The war in Iraq and uncertainty about the length of the war (at that time) weakened the value of the dollar, especially against the Euro, to its lowest level since the birth of the Euro.

European Euro and Japanese Yen Against the US Dollar

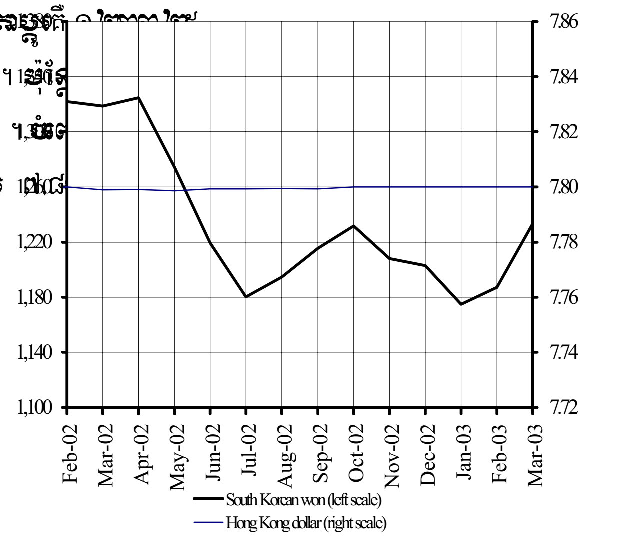


Sources: IMF, FEER, AWJ and the Economist

ភាពមិនច្បាស់លាស់ និងភាពតានតឹង ទាក់ទងនឹងកូរ៉េខាងជើង បន្តធ្វើឱ្យ តម្លៃរូបិយប័ណ្ណវ៉ុនកូរ៉េខាងត្បូង ។ នៅខែមីនា២០០៣ អត្រាប្តូរ វ៉ុន/ដុល្លារ ធៀបនឹង ១.១៨៧.២៥វ៉ុន/ដុល្លារនៅខែកុម្ភៈ ។ នឹងខែមីនាឆ្នាំមុន រូបិយប័ណ្ណវ៉ុនឡើងថ្លៃ៦%ធៀបនឹងដុល្លារ ។ ហុងកុង រូបិយប័ណ្ណដុល្លារអាមេរិកប្តូរតាមអត្រាកំណត់ ៧.៨ /ដុល្លារអាមេរិក ។

Uncertainty and tension regarding North Korea continued to undermine the value of the South Korean won. In March 2003, the dollar was priced at 1,233.25 won/dollar, up from 1,187.25 won/dollar in February. Compared to the same month last year, however, the won still appreciated by 6% against the dollar. Against the Hong Kong dollar, the US dollar was traded at the pegged rate of 7.8 HK dollar in March.

South Korean Won and Hong Kong Dollar Against the US Dollar

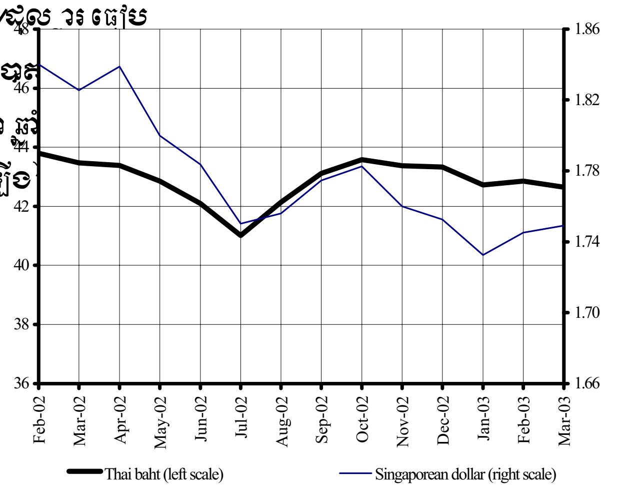


Sources: IMF, FEER, AWJ and the Economist

នៅខែមីនា ២០០៣ ដុល្លារអាមេរិកមានការប្រែប្រួលតិចតួច ធៀបនឹង សិង្ហបុរី និងរូបិយប័ណ្ណបាតថៃដោយប្តូរបាន ១.៧៤៩ដុល្លារសិង្ហបុរី/ដុល្លារ ធៀបនឹង ១.៧៤៥ដុល្លារសិង្ហបុរី/ដុល្លារកាលពីខែកុម្ភៈ និង ៤២.៦៥បាត ធៀបនឹង ៤២.៨៥បាត/ដុល្លារកាលពីខែកុម្ភៈ ។ ធៀបនឹងខែមីនា ឆ្នាំ ដុល្លារសិង្ហបុរីឡើងថ្លៃ៤.២%ធៀបនឹងដុល្លារ រីឯរូបិយប័ណ្ណបាតឡើង

In March 2003, the value of the dollar was little changed against the Singapore dollar and Thai baht. Against the Singaporean dollar, one US dollar was priced at 1.749 S$, up from 1.745 S$ in February. Against the Thai baht, the dollar was traded at 42.65 baht/dollar, down from 42.85 baht/dollar in February. Compared to March last year, the Singaporean dollar appreciated by 4.2% against the US dollar, and the baht appreciated by 1.9%.

Thai Baht and Singaporean Dollar Against the US Dollar



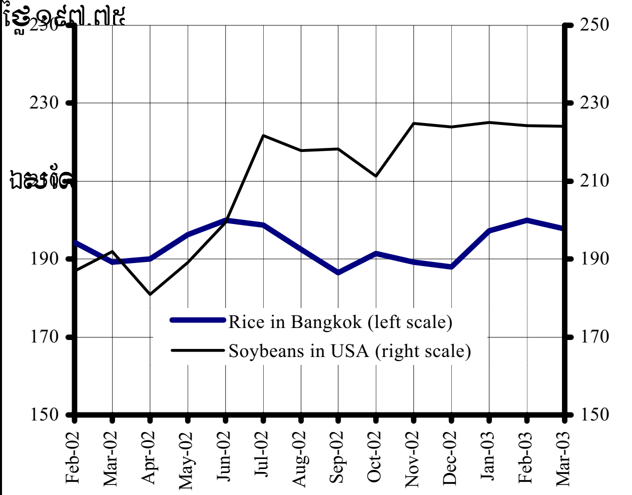
Sources: IMF, FEER and the Economist

ស្ថានភាពតំលៃទំនិញ លើទីផ្សារអន្តរជាតិ
Commodity Prices in the World Markets

នៅខែកុម្ភៈ-មីនា ២០០៣ ថ្លៃអង្ករលេខ១ និងថ្លៃសណ្តែកសៀងលើទីផ្សារអន្តរជាតិ ប្រែប្រួលតិចតួច។ នៅខែមីនា អង្ករលេខ១នៅបាងកកថ្លៃ១៩៧.៧៥ ដុល្លារ/តោន ឯសណ្តែកសៀងថ្លៃ២២៤.០៧ដុល្លារ/តោន ធៀបនឹង២០០ដុល្លារ/តោនអង្ករ និង២២៤.២៥ដុល្លារ/តោនសណ្តែកសៀង កាលពីខែកុម្ភៈ។ ធៀបនឹងខែមីនា ឆ្នាំមុន អង្ករឡើងថ្លៃ៤.៥% ឯសណ្តែ សៀងឡើងថ្លៃ១៦.៧% ។

During February-March 2003, prices of first quality rice and soybean in international markets were little changed. In Bangkok, first quality rice was traded at 197.75 US$/tonne, down from 200 US$/tonne in February. The price of soybean in the US remained at 224.07 US$/tonne, compared with 224.25 US$/tonne in February. Compared to March last year, the price of rice rose by 4.5%, and that of soybean by 16.7%.

Prices of Rice and Soybeans
(US$/tonne)

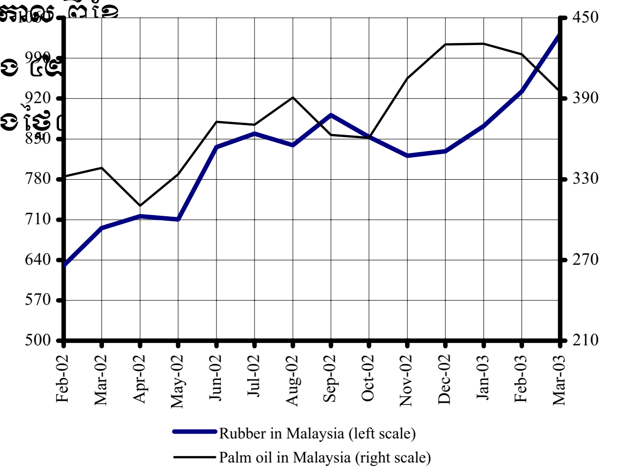


Sources: IMF, FAO, FEER and IGC

នៅខែមីនា ២០០៣ ថ្លៃកៅស៊ូក្នុងទីផ្សារអន្តរជាតិនៅម៉ាឡេស៊ី បន្តកើនឡើងដល់ ១.០៣២ដុល្លារ/តោន ធៀបនឹង ៩៣២ដុល្លារ/តោនកាល ពីខែកុម្ភៈ, ឯប្រេងដូងបន្តធ្លាក់ថ្លៃដល់ ៣៩៥ដុល្លារ/តោន ធៀបនឹង ៤២ /តោនកាលពីខែកុម្ភៈ ។ ធៀបនឹងកាលពីមួយឆ្នាំមុន កៅស៊ូឡើងថ្លៃ ឯប្រេងដូងឡើងថ្លៃ១៧% ។

Prices of Rubber and Palm Oil
(US$/tonne)

In March 2003, the price of rubber in Malaysia's international markets continued to rise, to 1,032 US$/tonne from 932 US$/tonne in February, while the price of palm oil continued to decline, to 395 US$/tonne from 423 US$/tonne in February. Compared to one year ago, the price of rubber climbed by 48%, and that of palm oil by 17%.

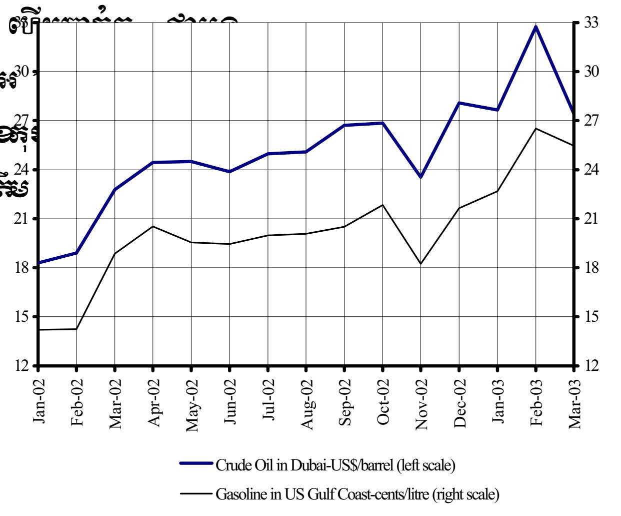


Sources: IMF, FAO and FEER

នៅខែមីនា ២០០៣ ថ្លៃសាំងឡើងចុះយ៉ាងខ្លាំង ដោយឡើងខ្ពស់បំផុតដល់ ៤៥,៣១សេន/លីត្រ មុនពេលសង្គ្រាមអ៊ីរ៉ាក់ផ្ទុះឡើង ហើយ បន្ទាប់មកថយចុះវិញ នៅពេលអាមេរិកឈ្នះសង្គ្រាម ។ នៅអ ជាមធ្យម ២៥,៤៥សេន/លីត្រ តិចជាង ៤%ធៀបជាងកាលពីខែ ពេលដដែល ប្រេងឆៅនៅឌូបៃ ធ្លាក់ថ្លៃ ១៦% ដល់ ២៧.៤២ដុល្លារ/ធុង ធៀបនឹង ៣២.៧ដុល្លារ/ធុងកាលពីខែកុម្ភៈ ។

Prices of Crude Oil and Gasoline

In March 2003, the price of gasoline was highly volatile, peaking at 45.31 cents/litre prior to the start of combat in Iraq, and then falling continuously on US success in the war, according to the American Automobile Association. On average, the price of gasoline in US gulf was 25.45 cents/litre, 4% lower than in February. During the same period, the price of crude oil in Dubai declined by 16% to 27.42 US$/barrel, from 32.7 US$/barrel in February.



Sources: IMF, EIA and IEA