



វិទ្យាស្ថានបណ្តុះបណ្តាល និង រូបវាចនាសាស្ត្រសេដ្ឋកិច្ចកម្ពុជា
Cambodia Development Resource Institute

របាយការណ៍ថ្លីៗស្តីពីសេដ្ឋកិច្ចកម្ពុជា
Flash Report on the Cambodian Economy

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Phnom Penh, Cambodia

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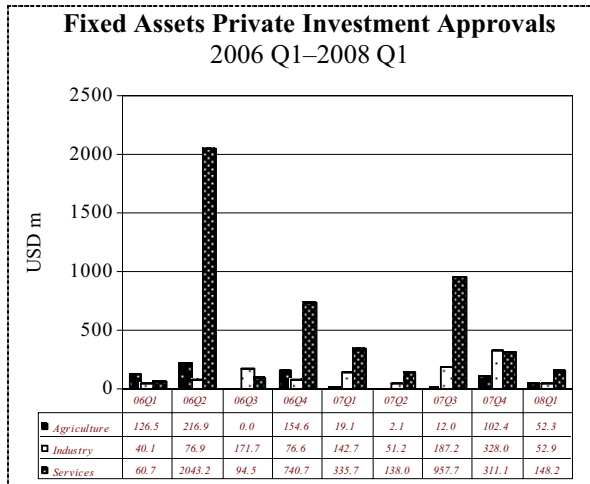
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<p>មតិសង្ខេបសំខាន់ៗ</p>	<p>Highlights</p>
<p>អត្ថបទនេះ ពិពណ៌នាពីនិទ្ទេសការប្រែប្រួលស្ថានភាពសេដ្ឋកិច្ចមួយចំនួនរបស់កម្ពុជា និងដៃគូរបស់កម្ពុជា ។ អត្ថបទផ្តល់ការប្រៀបធៀបពីបំរែបំរួលតួលេខនៃខែនេះជាមួយនឹងខែមុនៗក្នុងឆ្នាំ២០០៨ និង ២០០៧ ។</p> <p>ជាក់ស្តែងនៅត្រីមាសទី១ ឆ្នាំ២០០៨ អនុម័តវិនិយោគរបស់កម្ពុជា ថយចុះ ៦៦% ធៀបនឹងត្រីមាសមុន មកត្រឹម ២៥៣.៤លានដុល្លារ ។ អនុម័តវិនិយោគវិស័យកសិកម្មធ្លាក់ចុះ ៤៩% មកត្រឹម ៥២.៣លានដុល្លារ ហើយវិស័យឧស្សាហកម្មថយចុះ ៨៤% មកត្រឹម ៥២.៩លានដុល្លារ និងវិស័យសេវាកម្មថយចុះ ៥២% មកត្រឹម ១៤៨.២លានដុល្លារ ។</p> <p>នៅខែមិនា ២០០៨ អនុម័តគម្រោងសាងសង់នៅភ្នំពេញ ធ្លាក់ចុះ ៨៩% ធៀបនឹងខែមុន មកត្រឹម ៩.២លានដុល្លារ ។ អនុម័តសំណង់ភូមិគ្រឹះ និងផ្ទះ ធ្លាក់ចុះយ៉ាងខ្លាំងអស់ ៨២% និងផ្ទះល្វែងអស់ ៨៦% មកត្រឹម ៣.០លានដុល្លារ និង ៣.១លានដុល្លារ ។</p> <p>នៅខែកុម្ភៈ ២០០៨ ភ្ញៀវមកដល់កម្ពុជា ថយចុះ ៣.៩% ធៀបនឹងខែមុន មកត្រឹម ២១៤.៩០២នាក់ ។ ភ្ញៀវមកសំរាកលំហែ ថយចុះ ៣.៣% មកត្រឹម ១៩៦.៥៦៤នាក់ ។ ភ្ញៀវមកធ្វើជំនួញ ថយចុះ ៣.៩% មកត្រឹម ១៣.៤៤០នាក់ ។</p> <p>នៅខែមេសា ២០០៨ សាំង និងម៉ាស៊ូត បន្តឡើងថ្លៃ ។ សាំងលក់ថ្លៃជាមធ្យម ៤៨៩១រៀល/លីត្រ រីឡើងថ្លៃ ២.១% ធៀបនឹងខែមុន ។ ម៉ាស៊ូតលក់ថ្លៃជាមធ្យម ៤៤២៩រៀល/លីត្រ រីឡើងថ្លៃ ៤.២% ។ ម្ហូបអាហារតាមខេត្តមួយចំនួន បន្តឡើងថ្លៃរហូតតាំងពីដើមឆ្នាំ២០០៨ មកដល់បច្ចុប្បន្ននេះ ។</p> <p>នៅខែមករា ២០០៨ អត្រាការប្រាក់លើកំរើមរយៈ ១២ខែ ទាំងជាដុល្លារ និងប្រាក់រៀល បានធ្លាក់ចុះ ធៀបនឹងខែធ្នូ ២០០៧ ។ អត្រាការប្រាក់លើកំរើមរៀលមានកំរិត ២២.១២% គឺធ្លាក់ចុះធៀបនឹងខែមុន (២២.២៦%) ។ រីឯអត្រាការប្រាក់លើកំរើមដុល្លារ គឺ ១៦.០២% រឺ ០.០៨% ទាបជាងខែមុន ។ នៅខែមេសា ២០០៨ ប្រាក់រៀលធ្លាក់ថ្លៃ ០.១% ទល់នឹងដុល្លារអាមេរិក ដោយប្តូរបាន ៣៩៩៩.៦រៀល/ដុល្លារ តែឡើងថ្លៃចំនួន ០.៣% បើប្រៀបធៀបនឹងប្រាក់បាតថៃ ដោយប្តូរបាន ១២៧.២រៀល/បាត ។ ទល់នឹងប្រាក់ដុល្លារវៀតណាម ប្រាក់រៀលឡើងថ្លៃ ១.៤% ដោយប្តូរបាន ២៤.៩រៀល/១០០ដុល្លារ ។</p>	<p>This summary highlights changing trends in a number of economic indicators of Cambodia and its partners. It compares the variations of figures of the current month(s) with those of the earlier months in 2008 and in 2007.</p> <p>As of the first quarter 2008, Cambodia's investment approvals showed a 66 percent decrease from the earlier quarter to USD 253.4 m. Investment approvals for the agriculture sector dropped by 49 percent to USD 52.3 m, the industry sector fell by 84 percent to USD 52.9 m and the services sector declined by 52 percent to USD 148.2 m.</p> <p>Construction project approvals in Phnom Penh decreased by 89 percent from the previous month to USD 9.2 m in March 2008. Villas and houses, and flat approvals dropped dramatically by 82 percent and 86 percent to USD 3.0 m and USD 3.1, respectively.</p> <p>In February 2008, tourism arrivals to Cambodia declined by 3.9 percent from the preceding month to 214,902. Holiday arrivals dropped by 3.3 percent to 191,564. Arrivals for business purposes fell by 3.9 percent to 13,440.</p> <p>Prices of gasoline and diesel continued to increase in April 2008. Gasoline was sold at an average price of 4851 riels/l; the price was up by 2.1 percent from the previous month. The price of diesel rose by 4.2 percent, selling at an average of 4429 riels/l. Selected provincial food prices continued increasing, as they have since early 2008 to the recent month.</p> <p>In January 2008, 12-month interest rates on both dollar and riel loans showed a decrease compared with those in December 2007. The riel loan rate was 22.12 percent, which was down from 22.26 percent in the earlier month; while the interest rate on dollar loans was 16.02 percent, 0.08 percent lower than in the previous month. On the exchange rate, in April 2008, the riel depreciated by 0.1 percent against the US dollar, trading at 3999.6 riels/USD. The riel appreciated by 0.3 percent against the Thai baht, exchanging at 127.2 riels/baht. Against the Vietnamese dong, moreover, the value of riel increased by 1.4 percent, trading at 24.9 riels per 100 dong.</p>

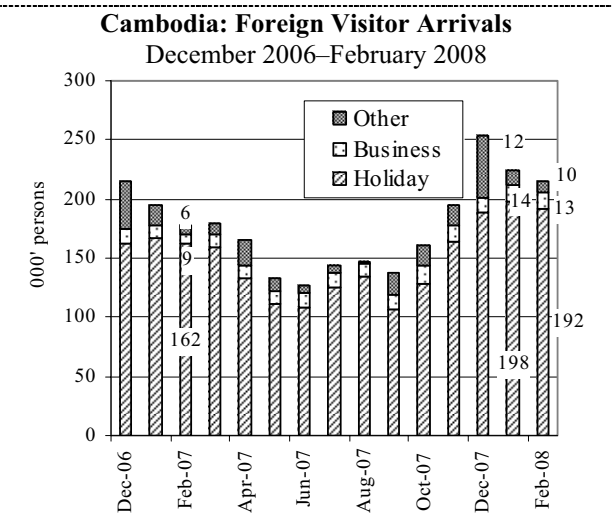
<p>នៅខែកុម្ភៈ ២០០៨ រូបិយវត្ថុទូទៅ (M2) កើន ៥៩% ធៀបនឹងខែកុម្ភៈ ២០០៧ ដល់ ១២១៤៧.២ពាន់លានរៀល ។ រូបិយវត្ថុ (M1) កើន ៣០% ដល់ ២២១២.៩ពាន់លានរៀល ហើយប្រាក់រៀលកំពុងចរាចរកើន ៣១% ដល់ ២១៥៨.១ពាន់លានរៀល ។ ប្រាក់បញ្ញើជាតិរៀល កើន ១៣% ដល់ ១៧៣.៥ពាន់លានរៀល រីឯ ប្រាក់បញ្ញើជាបរទេសរៀល កើន ៦៩% ដល់ ៩៨០៩.៥ពាន់លានរៀល ។</p>	<p>In February 2008, liquidity (M2) rose by 59 percent from the same month in the previous year to KHR 12,147.2 bn. Money (M1) increased moderately, by 30 percent to KHR 2212.9 bn., while riels in circulation increased by 31 percent to KHR 2158.1 bn. Riel deposits rose by 13 percent to KHR 173.5 bn and foreign currency deposits were up by 69 percent to KHR 9809.5 bn.</p>
<p>នៅខែកុម្ភៈ ២០០៨ ការនាំចេញរបស់កម្ពុជា កើន ១២% ដល់ ៣០០.៦លានដុល្លារ ។ ការនាំចេញសំលៀកបំពាក់ បានកើនឡើង រីឯការនាំចេញកៅស៊ូ និងត្រី បានធ្លាក់ចុះ ។ ចំពោះការនាំចូលវិញ ការនាំចូលបារីបានកើនឡើងធៀបនឹងខែមុន រីឯការនាំចូលស៊ីម៉ង់ត៍ និងដែក បានធ្លាក់ចុះ ។ លើសពីនេះទៀត ការនាំចូលសាំងសរុប ថយចុះបន្តិចបើធៀបនឹងខែមុន ។</p>	<p>There was an increase of 12 percent to USD 300.6 m in Cambodia's exports in February 2008. Garment exports showed an increase, while rubber and fish exports fell. On the import side, cigarette imports rose from the month before, while cement and steel imports showed a moderate decline. Furthermore, there was a slight decline in the value of gasoline imports compared with those of the previous month.</p>
<p>នៅខែធ្នូ ២០០៧ រដ្ឋាភិបាលមានឱនភាពថវិកាចរន្ត ១៣១.៤ពាន់លានរៀល ។ ចំណូលចរន្ត កើន ៦១% រីឯចំណាយចរន្តកើនមួយដាច់បីបើធៀបនឹងចំណាយខែមុន ។</p>	<p>In December 2007, the government's current budget deficit was KHR 131.4 bn. Current revenue rose by 61 percent, while current expenditure increased to threefold the value of the previous month.</p>
<p>នៅខែមីនា ២០០៨ ផលិតផលនាំចូលមួយចំនួនពីប្រទេសថៃ និងប្រទេសវៀតណាម បន្តឡើងថ្លៃ លើកលែងតែថ្លៃគ្រាប់ស្វាយចន្ទី មកពីប្រទេសវៀតណាម ។</p>	<p>Prices of selected export products of Thailand and Vietnam continued to rise in March 2008, except for the price of cashew nuts from Vietnam.</p>
<p>នៅខែមីនា ២០០៨ អត្រាអតិផរណានៅ US កើនដល់ ៤.០% តំបន់អឺរ៉ុប ៣.៦% និងជប៉ុន ១.២% ។ អត្រាអតិផរណានៅចិន ហុងកុង និងថៃ មានកំរិតទាបជាងខែមុន រីឯអត្រាអតិផរណានៅកូរ៉េខាងត្បូង ម៉ាឡេស៊ី និងសិង្ហបុរី ខ្ពស់ជាងអត្រានៅខែមុន ។ នៅអំឡុងខែមីនា ការនាំចេញរបស់ US និងតំបន់អឺរ៉ុប ធ្លាក់ចុះ រីឯការនាំចេញរបស់ជប៉ុន កើនឡើងដល់ ១៩៧.២ពាន់លានដុល្លារ ។</p>	<p>In March 2008, on a year-on-year basis, the inflation rate in the US, Euro zone and Japan increased by 4.0 percent, 3.6 percent and 1.2 percent respectively. Inflation rates in China, Hong Kong and Thailand were lower than those in the preceding month, while those in South Korea, Malaysia and Singapore were higher than the rates in the earlier month. During March, exports from US and the Euro zone went down, while Japanese exports increased to USD 197.2 bn.</p>
<p>នៅខែឧសភា ២០០៨ ដុល្លារ US ឡើងថ្លៃទល់នឹងប្រាក់រៀលកូរ៉េខាងត្បូង ដុល្លារហុងកុង ដុល្លារសិង្ហបុរី យ៉េនជប៉ុន បាតថៃ និង អឺរ៉ុប ។</p>	<p>In May 2008, the value of the US dollar appreciated against the Korean won, Hong Kong dollar, Singapore dollar, Japanese yen, Thai baht and the euro.</p>
<p>នៅខែមេសា ២០០៨ ថ្លៃសណ្តែកស្បែង និងពោតនៅទីផ្សារអន្តរជាតិ កើនដល់ ៤៥៣.៧ដុល្លារ/តោន និង ២២៤.៦ដុល្លារ/តោន រីឯថ្លៃប្រេងឆាចុះ មកត្រឹម ១០៦៤.៨ដុល្លារ/តោន ។ ទន្ទឹមគ្នាដែរ ថ្លៃប្រេងឆៅលក់ដល់ដៃ OPEC គឺ ១០៥.០ដុល្លារ/ធុង ធៀបនឹងខែមុន ១០០.៥ដុល្លារ/ធុង ។</p>	<p>Prices of soybean and maize in the international market rose to USD 453.7/tonne and USD 224.6/tonne respectively, while the palm oil price per tonne fell to USD 1064.8 in April 2008. Meanwhile, the price of crude oil at OPEC spot was USD 105.0/barrel, which was up from USD 100.5/barrel in the preceding month.</p>

សកម្មភាពសេដ្ឋកិច្ចសំខាន់ៗ និង ថ្លៃទំនិញរបស់កម្ពុជា

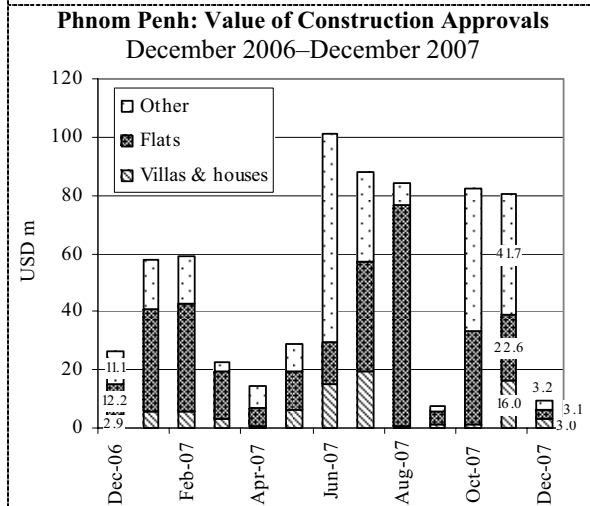
Main Economic Activities and Consumer Prices of Cambodia



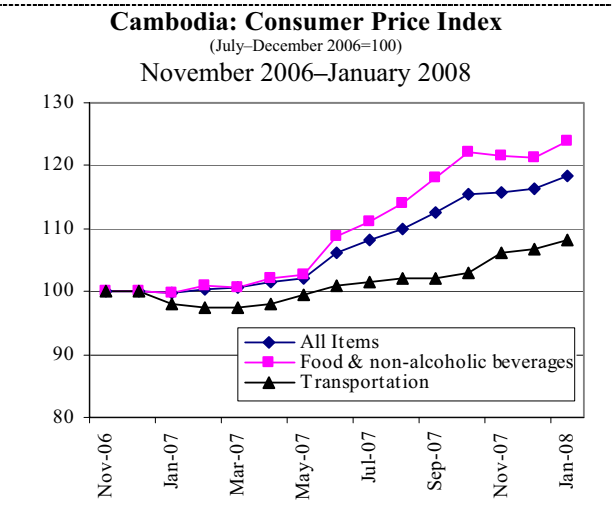
Including expansion projects.
Source: Council for the Development of Cambodia



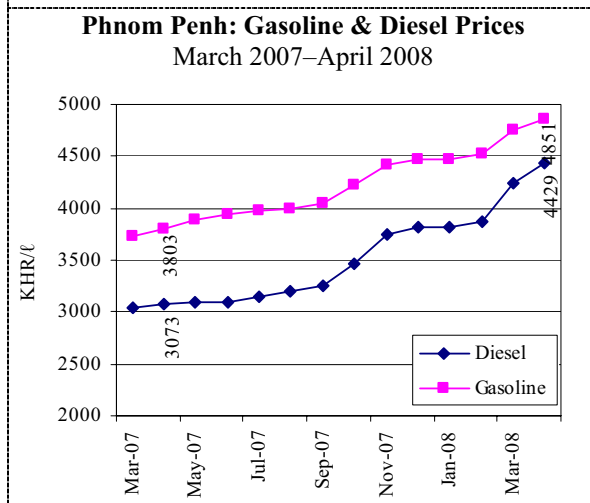
Source: Ministry of Tourism



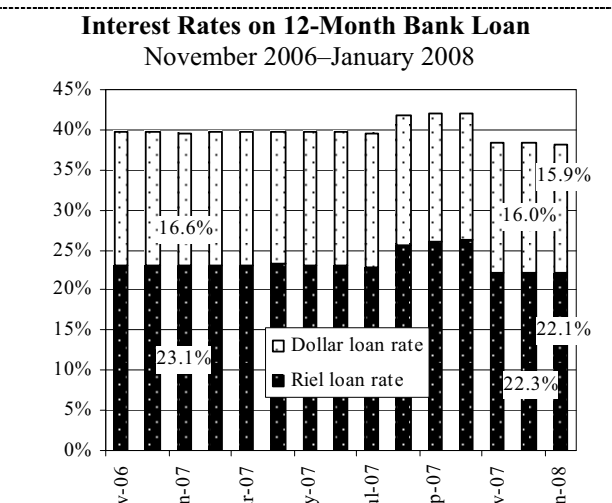
Source: Economic & Monetary Statistics, NBC



Source: National Institute of Statistics

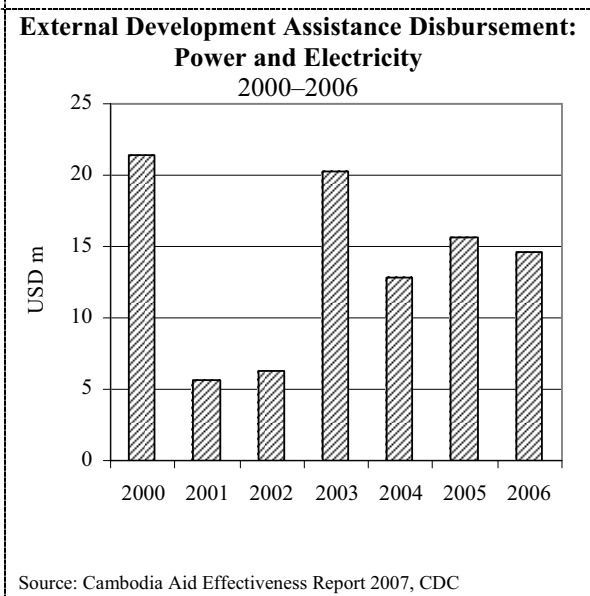
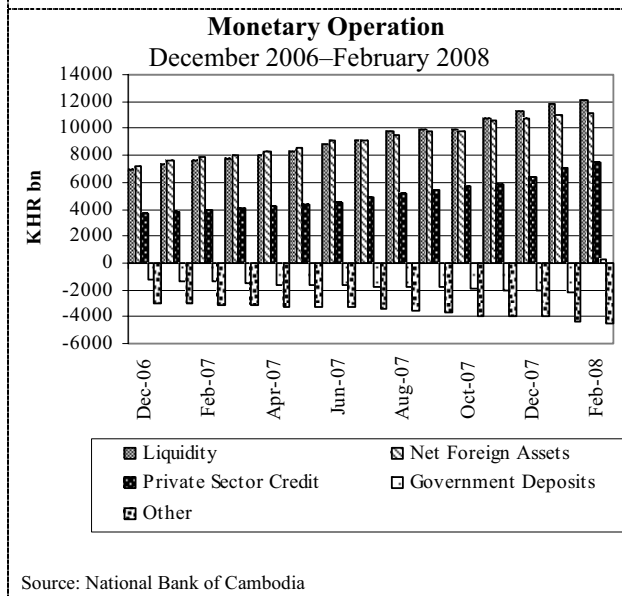
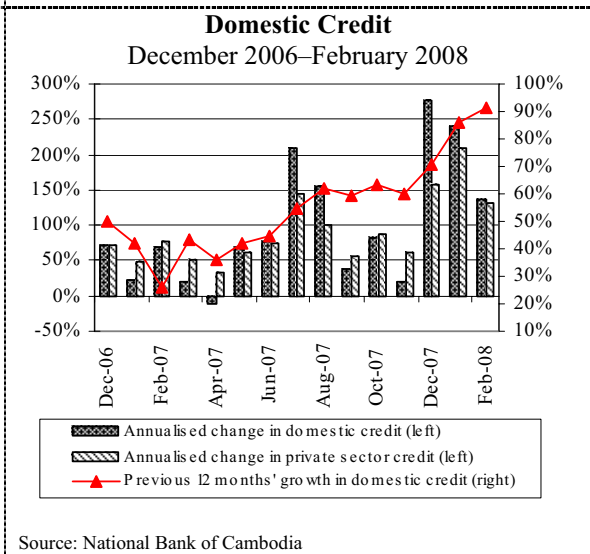
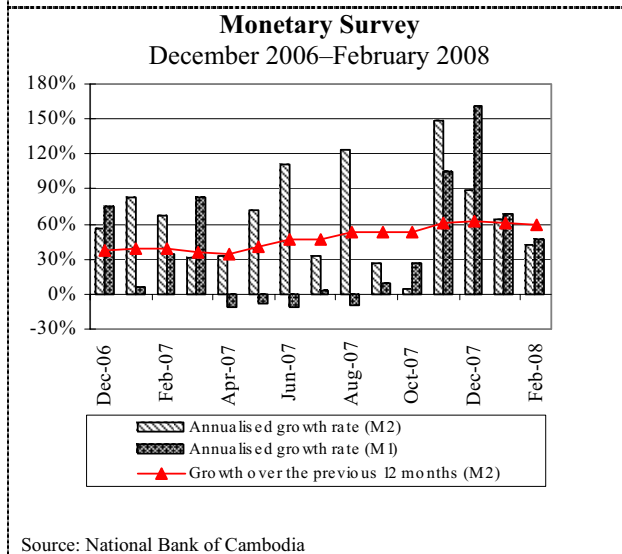
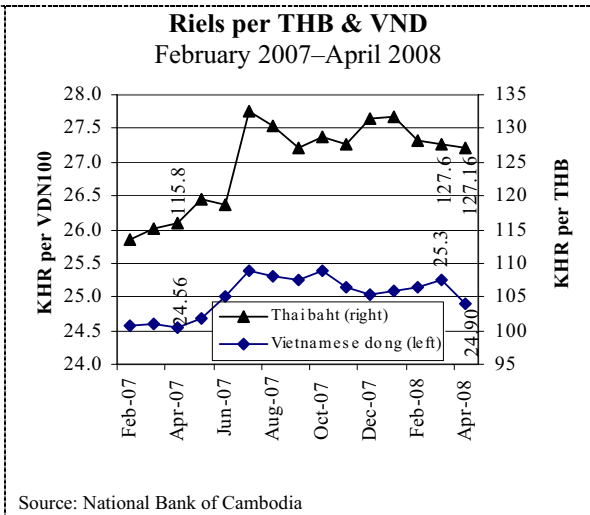
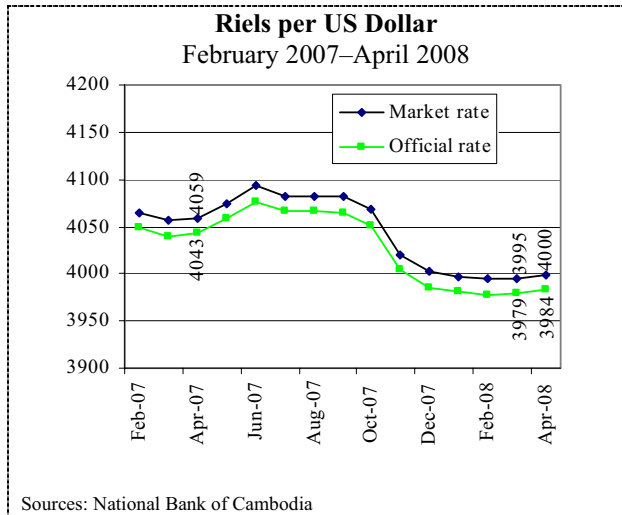


Sources: CDRI

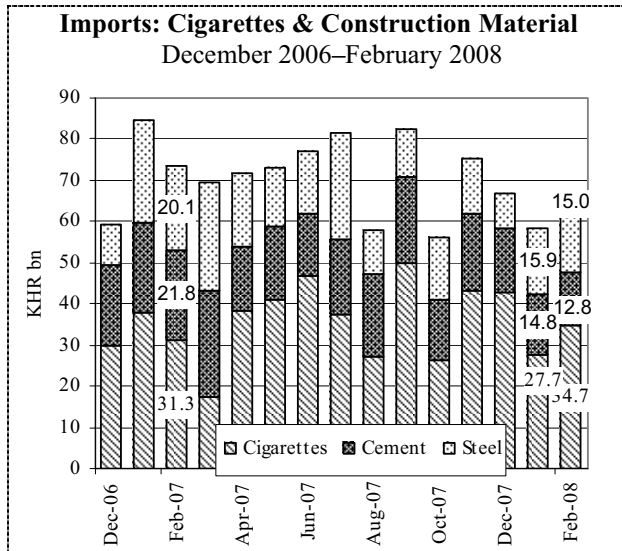


Source: Economic & Monetary Statistics, NBC

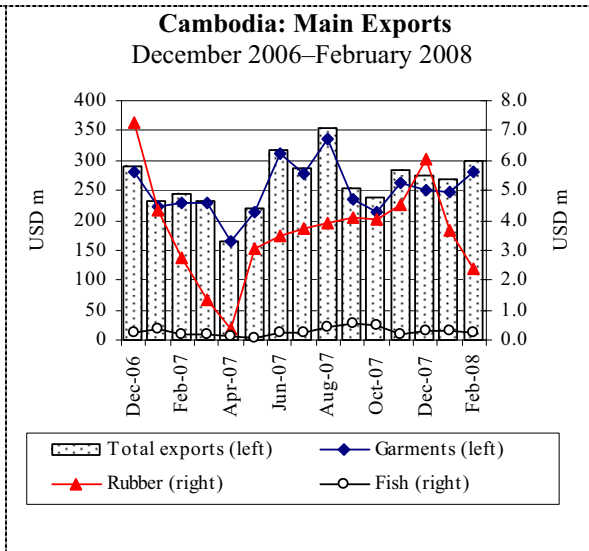
ស្ថានភាពអត្រាប្តូរទ្រព្យ និង ជំនួយអភិវឌ្ឍន៍ពីក្រៅប្រទេស
Exchange Rates and External Development Assistance



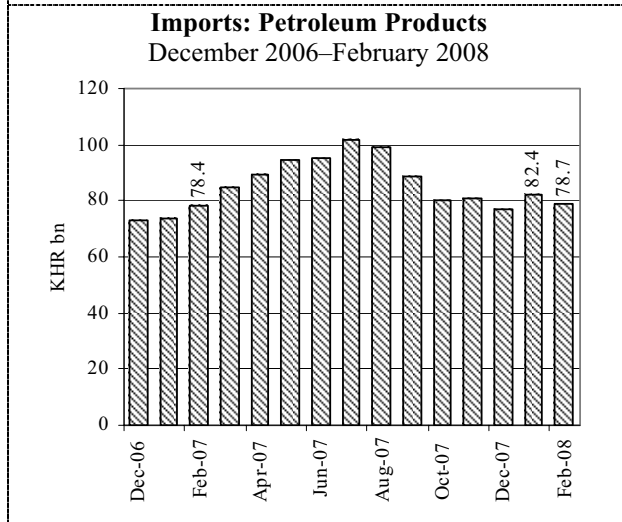
ពាណិជ្ជកម្មក្រៅប្រទេស និង ការអនុវត្តថវិកាជាតិ
External Trade and National Budget Operation



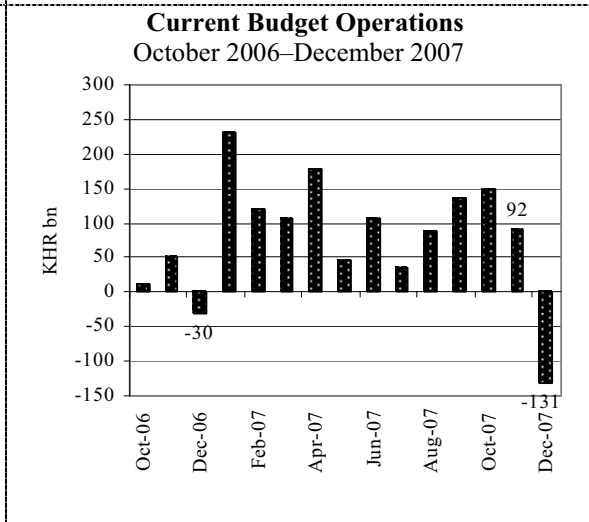
Source: Economic & Monetary Statistic, Monthly Bulletin of NBC



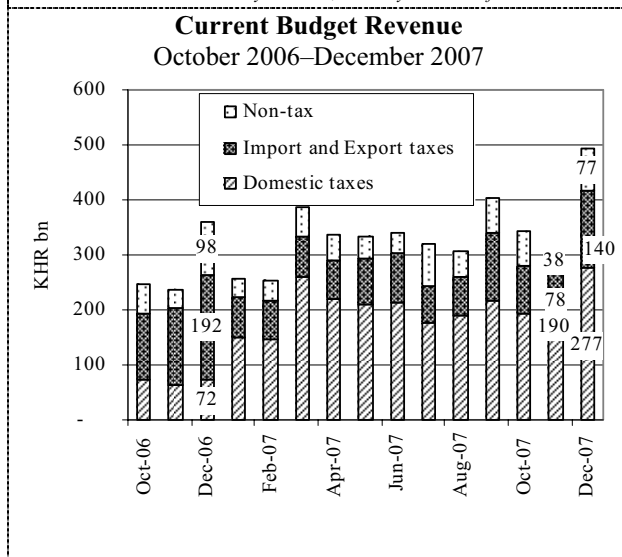
Source: Economic & Monetary Statistic, Monthly Bulletin of NBC



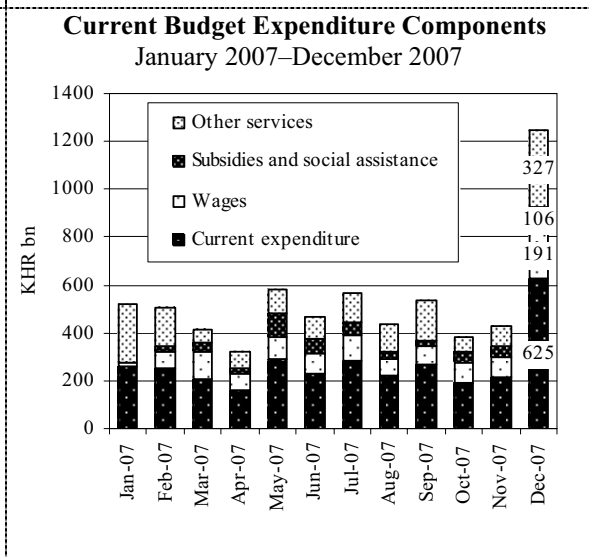
Source: Economic & Monetary Statistic, Monthly Bulletin of NBC



Source: MEF website

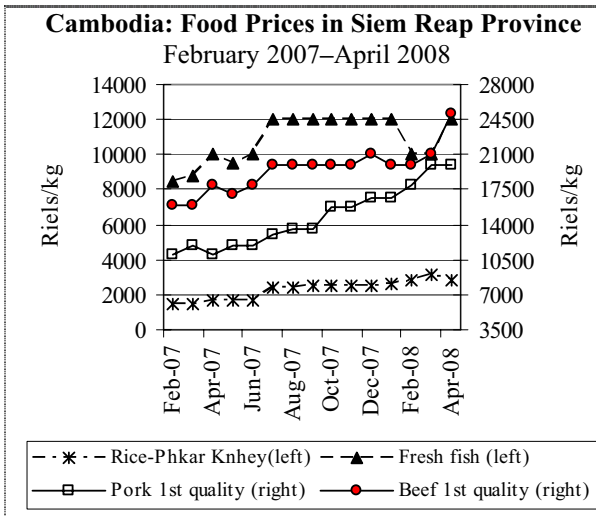


Source: MEF website

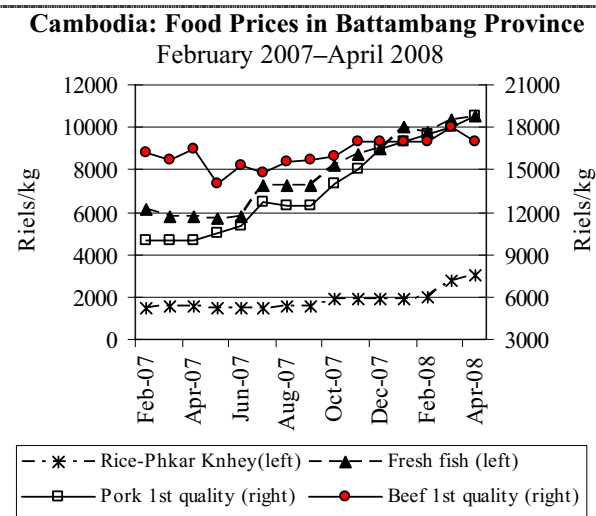


Source: MEF website

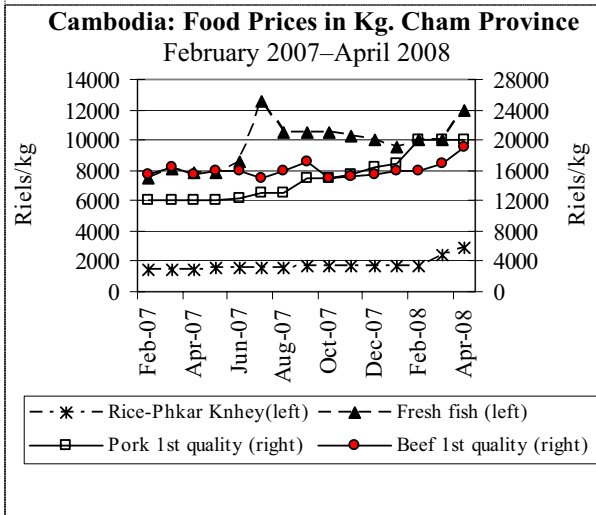
ផ្លូវទំនិញតាមបណ្តាខេត្តស្រុកទេសកម្ពុជា
Provincial Goods Prices in Cambodia



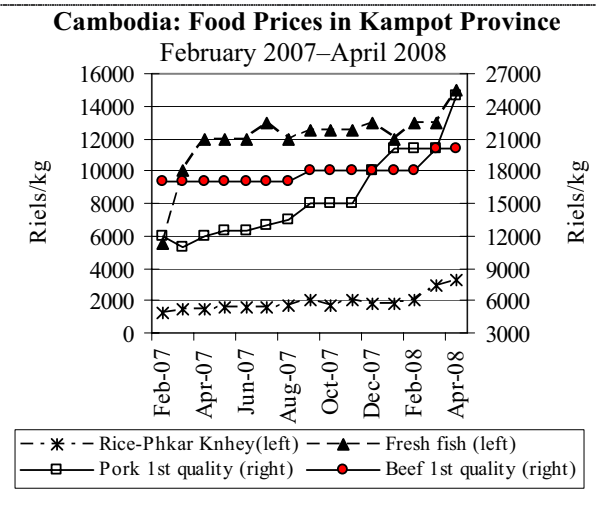
Source: CDRI



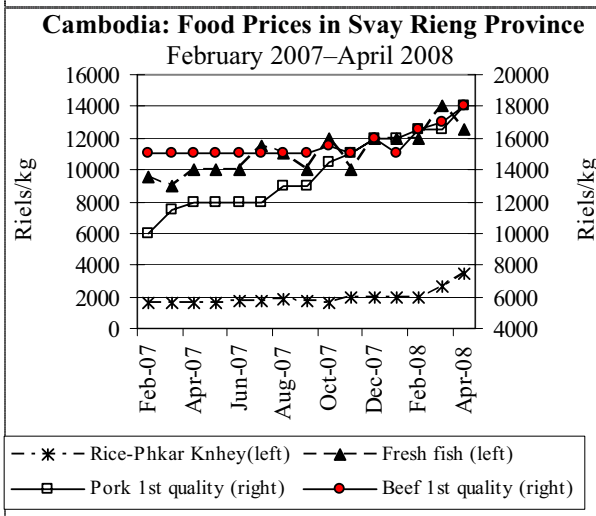
Source: CDRI



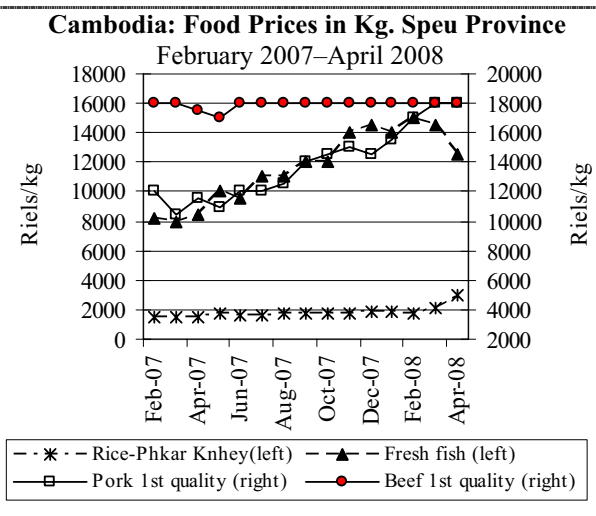
Source: CDRI



Source: CDRI



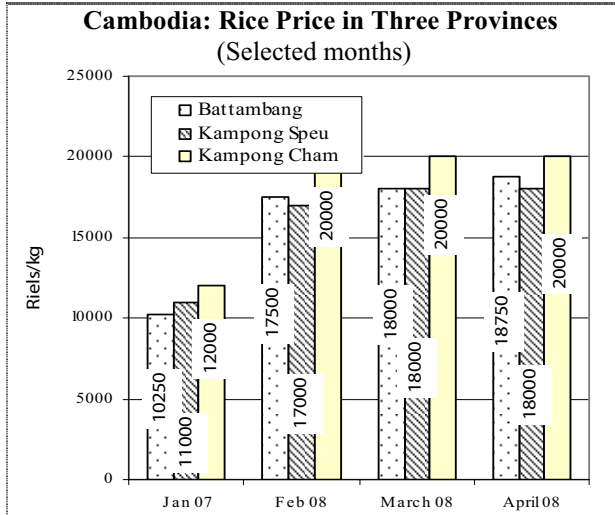
Source: CDRI



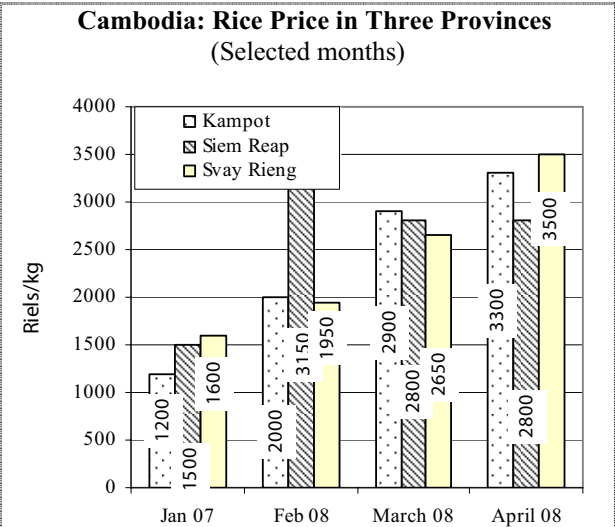
Source: CDRI

ផ្ទៃក្នុងស្រុកតាមបណ្តាខេត្តស្រែចម្ការសកម្មជាតិ: តាមមូលដ្ឋានស្រុក

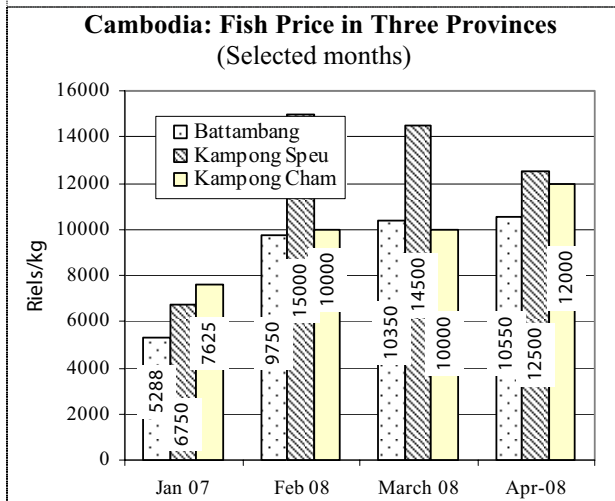
Provincial Goods Prices in Cambodia by Products



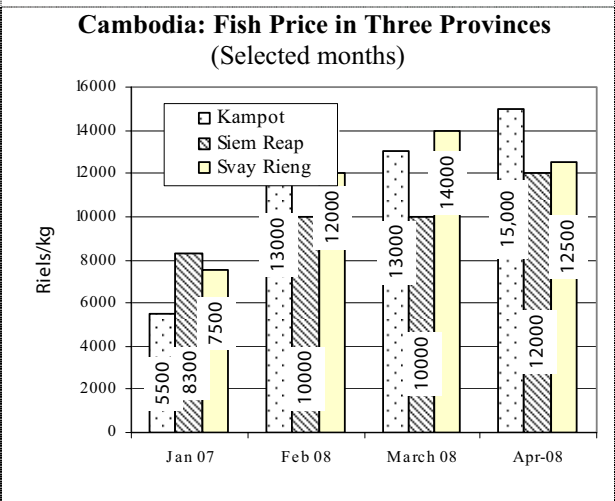
Source: CDRI



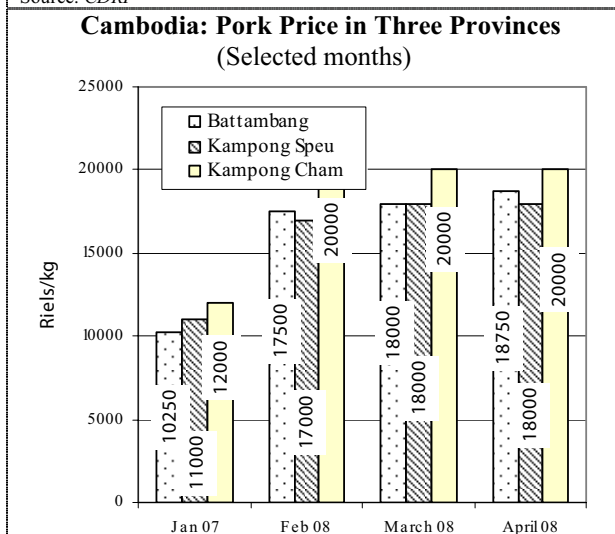
Source: CDRI



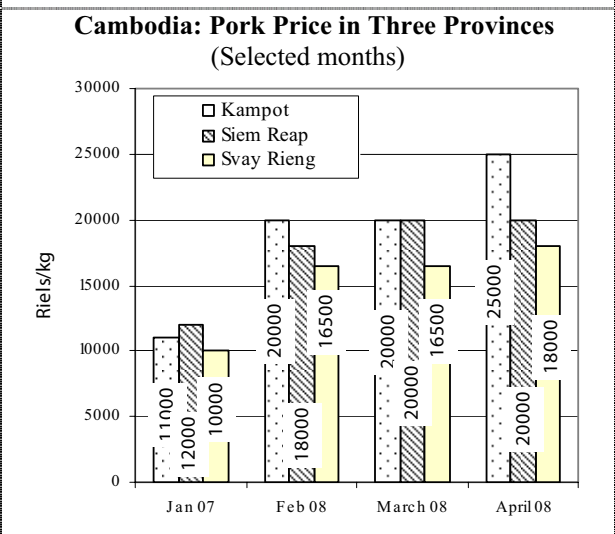
Source: CDRI



Source: CDRI



Source: CDRI



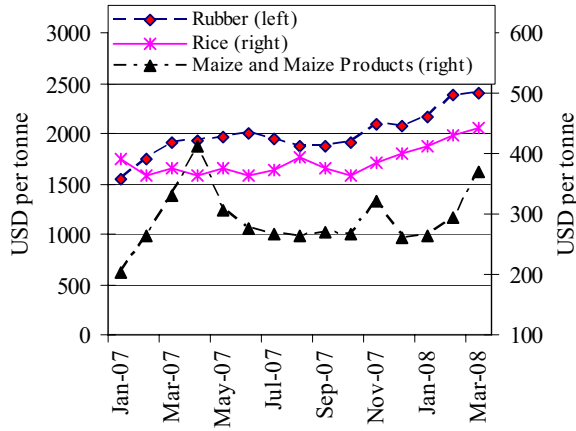
Source: CDRI

កម្រិតតម្លៃ តម្លៃសាមញ្ញ និង ទិន្នន័យនិក្ខេប

ជំនួញសេដ្ឋកិច្ច និង ទិសដៅទេសចរណ៍

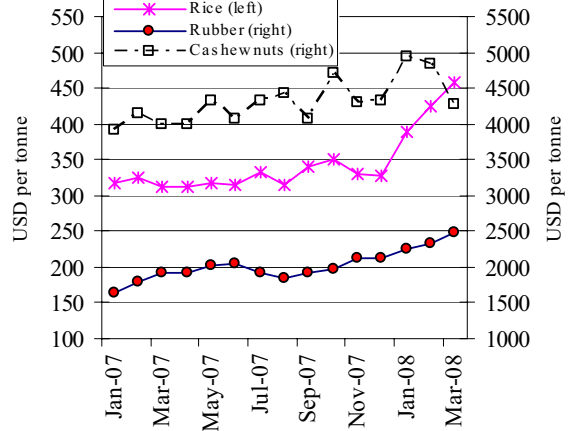
Goods Prices, Exports and International Tourist Arrivals to Partners of Cambodia

Thailand: Prices of Rubber, Rice and Maize
January 2007–March 2008



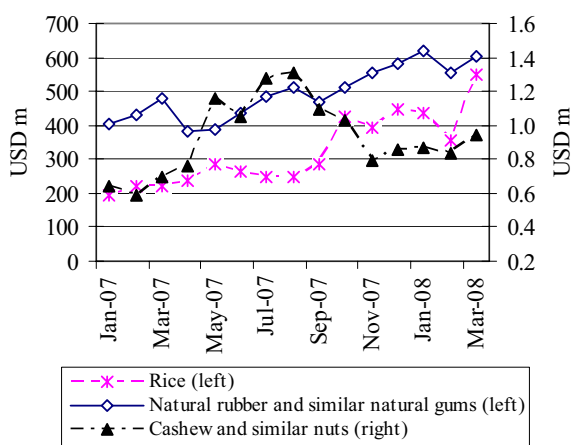
Source: Bank of Thailand, Foreign Trade and Balance of Payments

Vietnam: Prices of Rubber, Rice and Cashew nuts
January 2007–March 2008



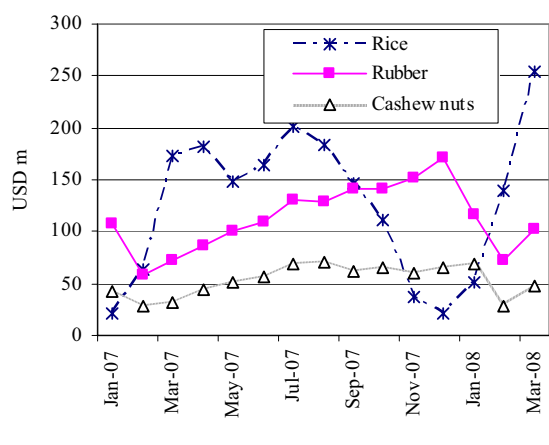
Source: General Statistics Office of Vietnam

Thailand: Exports to the World
January 2007–March 2008



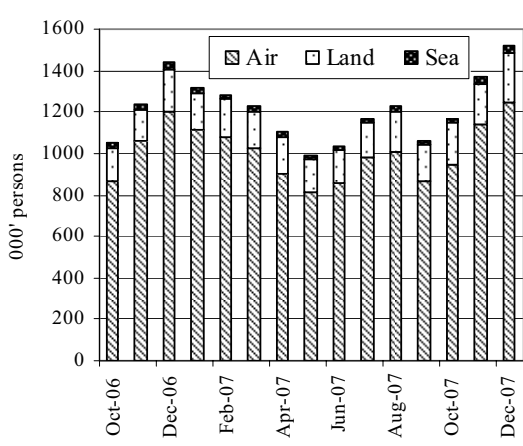
Source: The Customs Department of Thailand

Vietnam: Exports to the World
January 2007–March 2008



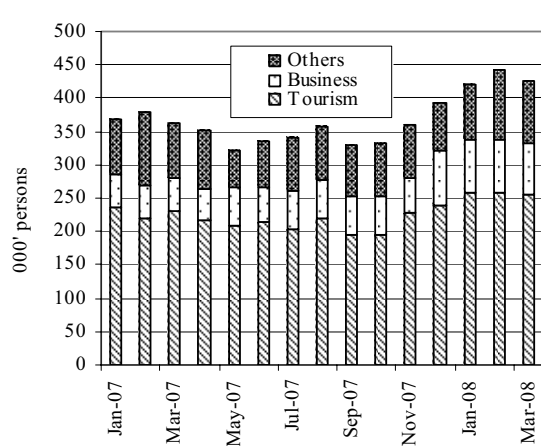
Source: General Statistics Office of Vietnam

Thailand: International Tourist Arrivals
October 2006–December 2007



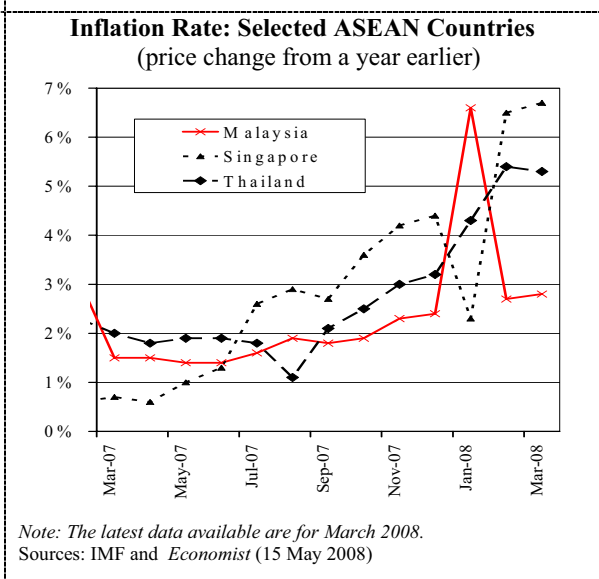
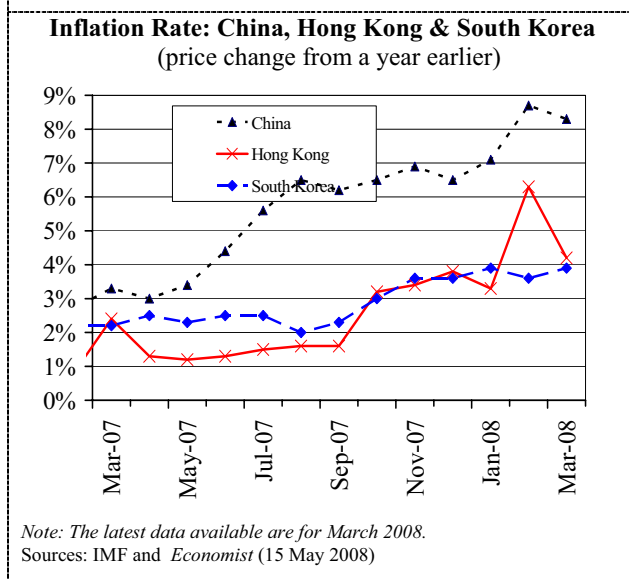
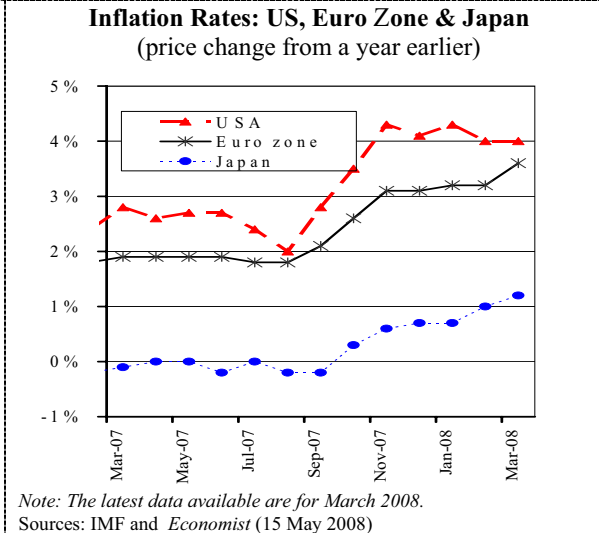
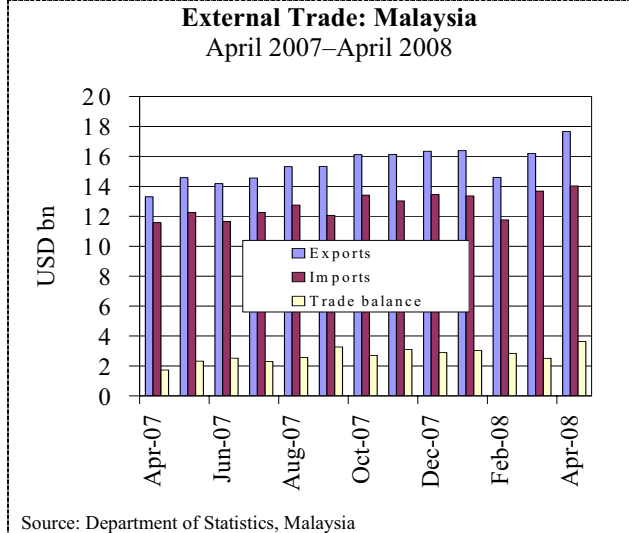
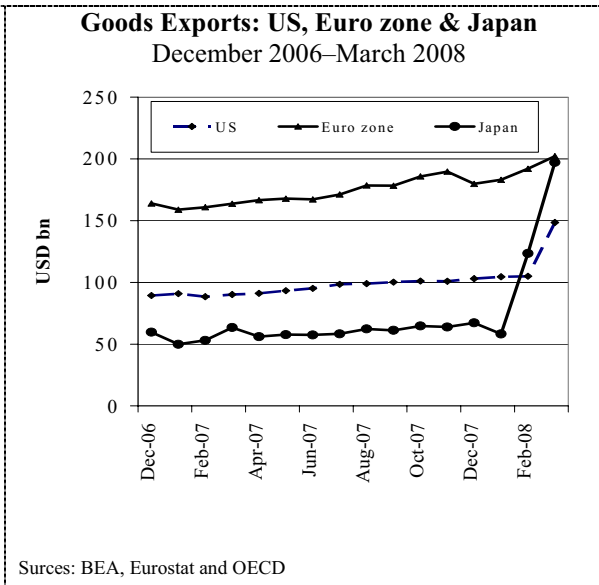
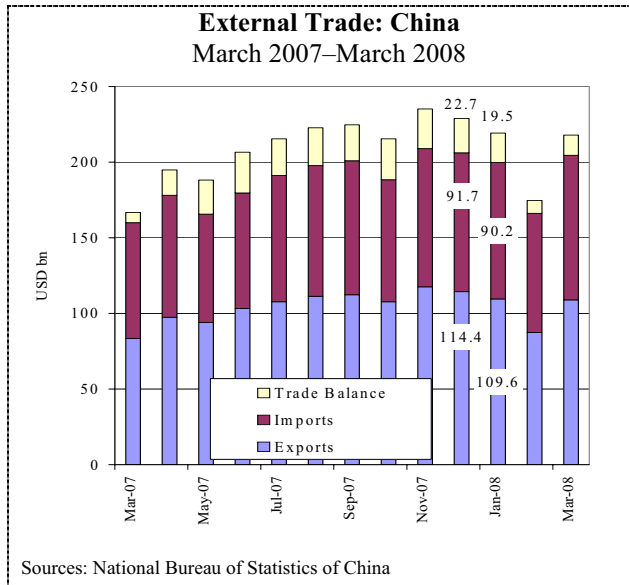
Source: The Tourism Authority of Thailand (TAT)

Vietnam: International Tourist Arrivals
January 2007–March 2008

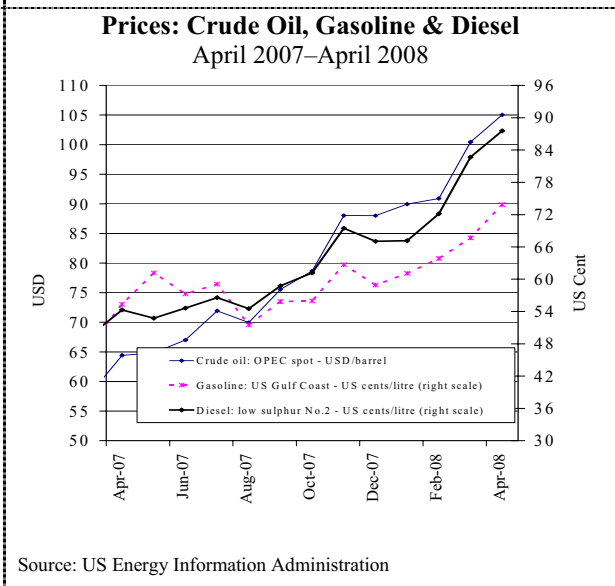
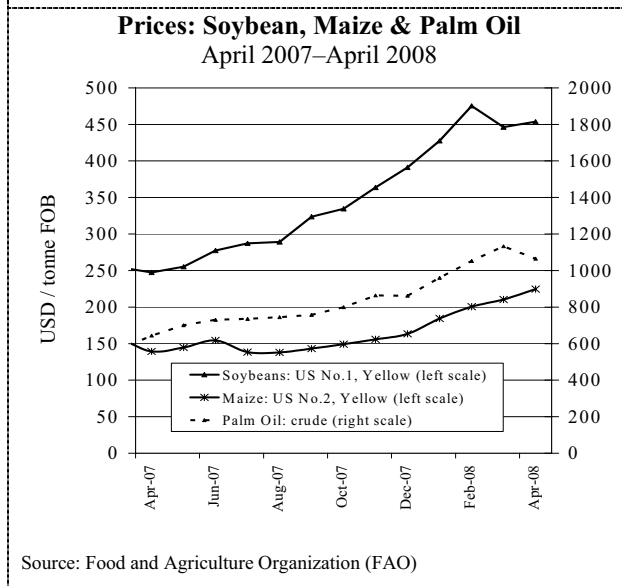
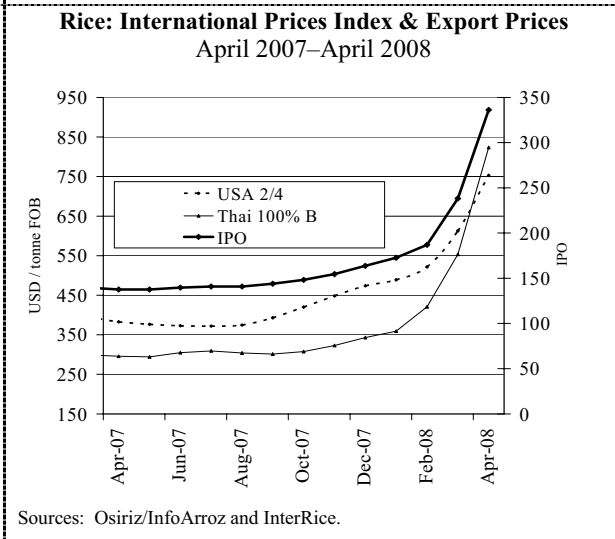
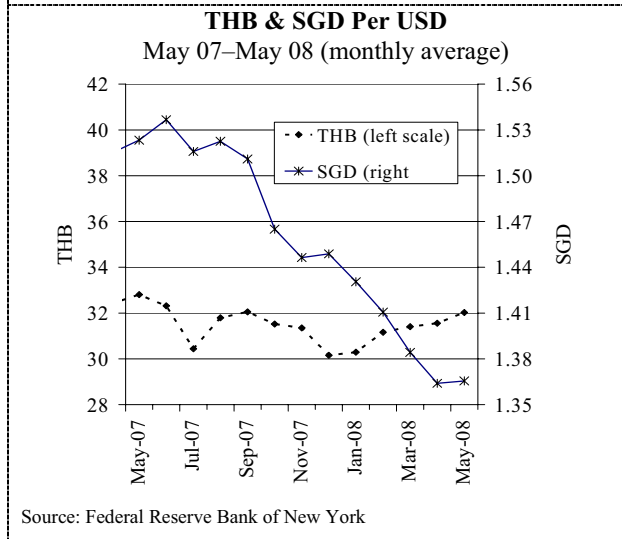
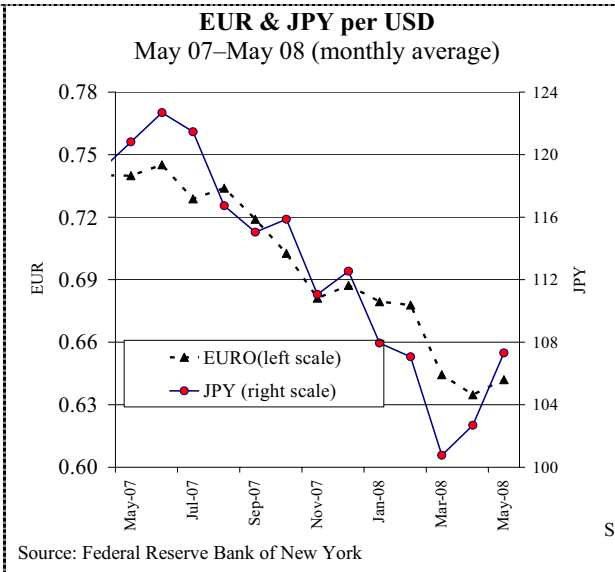
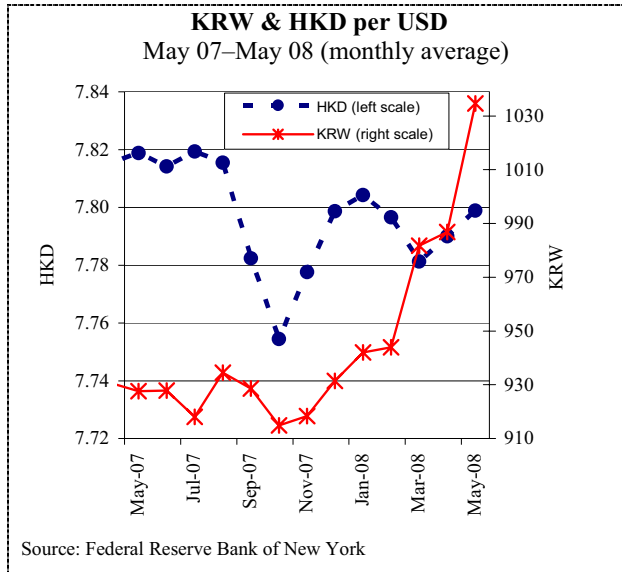


Source: General Statistics Office of Vietnam

Economic Activity and Inflation Rates of Selected Economic Partners of Cambodia



អត្រាប្តូរទ្រព្យ និង ថ្លៃទំនិញលើទីផ្សារអន្តរជាតិ
Exchange Rates and Commodity Prices in World Markets



ព័ត៌មានសេដ្ឋកិច្ច
Economic News

ព័ត៌មានសេដ្ឋកិច្ចសំខាន់ៗ:

មតិជំនាញការ : ថ្លៃសាំងអាចឥទ្ធិពលដល់សេដ្ឋកិច្ចកម្ពុជា :

នៅថ្ងៃព្រហស្បតិ៍ សារព័ត៌មាន *Mekong Times* បានចុះផ្សាយពីការក្រើនរំលឹករបស់សេដ្ឋកិច្ចវិទូថា ការបន្តឡើងថ្លៃសាំងអាចប៉ះពាល់ដល់ថ្លៃទំនិញទាំងអស់ និងឥទ្ធិពលដល់សេដ្ឋកិច្ចកម្ពុជា ។ កំណើនថ្លៃសាំងនឹងបង្កើនថ្លៃដើមផលិតកម្ម និងថ្លៃដឹកជញ្ជូន ហើយនាំឱ្យមានការឡើងថ្លៃទំនិញគ្រប់មុខ ។ វាក៏អាចឥទ្ធិពលលើសេដ្ឋកិច្ច ពីព្រោះប្រជាជននឹងមានចំណូលនៅទំនេរកាន់តែតិច ដើម្បីទិញទំនិញប្រើប្រាស់ និងជួយជំរុញសេដ្ឋកិច្ច ។ យោងតាមវិទ្យាស្ថានជាតិស្ថិតិ ថ្លៃទំនិញប្រើប្រាស់នៅកម្ពុជាបានឡើងខ្ពស់បំផុតដល់ទៅ ១៨.៧% ពីខែមករា ២០០៧ ដល់ មករា ២០០៨ ។

រដ្ឋាភិបាលបញ្ចប់ការហាមឃាត់ការនាំចេញអង្ករ: កាលពីថ្ងៃ ២៦ ឧសភា សម្តេចនាយករដ្ឋមន្ត្រី ហ៊ុន សែន បានប្រកាសថា រដ្ឋាភិបាលបានបញ្ចប់ការហាមឃាត់រយៈពេលពីរខែលើការនាំចេញអង្ករទៅអន្តរជាតិ ទោះបីនៅសល់ការដាក់កំហិតខ្លះៗក្តី ។ រដ្ឋាភិបាលនឹងអនុញ្ញាតអោយនាំចេញអង្ករ ១.៦លានតោន ពីកម្ពុជាចាប់ពីពេលនេះរហូតដល់ថ្ងៃទី៣១ ធ្នូ ប៉ុន្តែក្រសួងពាណិជ្ជកម្ម បានផ្តល់អាជ្ញាប័ណ្ណតែចំពោះក្រុមហ៊ុនពាណិជ្ជកម្មបែបសហគ្រាសកសិកម្មរបស់រដ្ឋ និងសមាគមអ្នកកិនស្រូវកម្ពុជា (National Cambodia Rice Millers' Association: NCRMA) ដើម្បីធ្វើការនាំចេញអង្ករលើសពី ១០០តោនក្នុងមួយលើកៗ ។ សម្តេច ហ៊ុន សែន បានសន្យាថា កសិករដែលធ្វើពាណិជ្ជកម្មនាំចេញស្រូវអង្ករជាទ្រង់ទ្រាយតូចឆ្លងកាត់ព្រំដែន អាចបន្តធ្វើទៀតបានដោយគ្មានការបង់ពន្ធ និងមិនចាំបាច់មានអាជ្ញាប័ណ្ណពីក្រសួងពាណិជ្ជកម្ម ។ សម្តេចបានបញ្ជាក់ថា "ប្រជាពលរដ្ឋដែលធ្លាប់នាំចេញស្រូវអង្ករ តាមច្រកត្រួតពិនិត្យខុសច្បាប់ នឹងបែរមកធ្វើជំនួញតាមផ្លូវស្របច្បាប់វិញ ដែលធ្វើអោយងាយស្រួលដល់រដ្ឋាភិបាលក្នុងការគណនាបរិមាណស្រូវអង្ករនាំចេញ។" សម្តេច បានធានាចំពោះសាធារណជនថា កម្ពុជានឹងមិនខ្វះខាតស្រូវអង្ករទេ ហើយគ្រួសារជាច្រើនបានស្តុកស្រូវទុកសំរាប់ប្រើប្រាស់ផ្ទាល់ខ្លួន ។ សម្តេច បានលើកថាកសិករ ៨០% រីករាយនឹងអង្ករបានថ្លៃខ្ពស់ ដែលបច្ចុប្បន្ននេះ អាចលក់បានពី ២.០០០រៀល (០.៥០ដុល្លារ) ទៅ ៣.៦០០រៀល/តីឡូក្រាម ។

(ប្រភព : The Phnom Penh Post)

Economic News Highlights:

Experts: Gasoline cost may slow Cambodian economy:

Economists have warned that the continuing rise of gasoline prices might affect prices across the board and slow Cambodia's economy, the *Mekong Times* newspaper said. The climbing gas prices will raise production and transportation costs, and that will lead to an across-the-board price increase, they said. It could also slow down the economy, as people will have less disposable income, they added. Consumer prices in Cambodia hit a record-high increase of 18.7 percent from January 2007 to January 2008, according to the National Institute of Statistics. (Source: Xinhua)

Government lifts rice export ban: The government's two-month ban on international rice exports has been lifted although some restrictions will remain, Prime Minister Hun Sen announced May 26. The government will allow 1.6 million tonnes of milled rice to leave Cambodia from now until December 31, but the Ministry of Commerce has only given licenses for Green Trade—a state-owned agriculture firm—and the National Cambodian Rice Millers' Association (NCRMA) to export more than 100 tons at a time. Hun Sen has also pledged that farmers engaging in small-scale rice trade across the border can continue to do so tax-free and without a Ministry of Commerce license. "People who used to export via illegal checkpoints will return to trading through legal channels," Hun Sen said. "It will now be easier for us to calculate the level of rice exports." He assured the public that the country does not have a shortage of rice, adding that most families set aside rice stocks for their own consumption. He said that 80 percent of farmers are happy with the high price of rice, which is currently trading at between 2,000 riels (\$0.50) and 3,600 riels per kilogram. (Source: Phnom Penh Post)

Links to other economic news:

- 1. "Increased rice stockpiles won't boost food security: analysts" (<http://www.phnompenhpost.com/index.php/200805151850/Business/Increased-rice-stockpiles-wont-boost-food-security-analysts.html>)
- 2. "Tons of smuggled rice seized at border" (<http://www.phnompenhpost.com/index.php/200805151849/National-news/Tons-of-smuggled-rice-seized-at-border.html>)