



វិទ្យាស្ថានបណ្តុះបណ្តាល និង គ្រូបាទគ្រូបាទដើម្បីអភិវឌ្ឍន៍កម្ពុជា

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របាយការណ៍ថ្លីៗស្តីពីសេដ្ឋកិច្ចកម្ពុជា

Flash Report on the Cambodian Economy

តុលា ២០០៨ / October 2008

សាំង ច័ន្ទហង្ស / Saing Chan Hang

ដាន់ ដាលីស / Phann Dalis

ប៉ុន ជុំណា / Pon Dorina

បកប្រែដោយ: យូ សិទ្ធិវិទ្យា និង ខុច ជានិទ្ទេស

ភ្នំពេញ កម្ពុជា

Phnom Penh, Cambodia

TO SUBSCRIBE, PLEASE CONTACT:

*Office Address: #56, Street 315, Tuol Kork, Phnom Penh, Cambodia, Postal Address: CDRI, PO Box 622 Phnom Penh, Cambodia
Tel: (855-23) 881-384/881-701/881-916/883-603 Fax: (855-23) 880-734 E-mail: pubs@cdri.forum.org.kh. Web site: http://www.cdri.org.kh*

ការបកស្រាយតារាងសំខាន់ៗ

Highlights

អត្ថបទសង្ខេបនេះ គូសបញ្ជាក់ពីស្ថានភាពសេដ្ឋកិច្ចមួយចំនួនរបស់កម្ពុជា និងប្រទេសជាដៃគូ ដោយផ្តល់ការប្រៀបធៀបតួលេខនៃខែនេះ ជាមួយនឹងខែមុនៗ ក្នុងឆ្នាំ២០០៨ និង ២០០៧ ។

This report pinpoints the economic indicators of Cambodia and its partners. It compares figures for the current months with earlier months in 2008 and 2007.

នៅត្រីមាសទី២ ឆ្នាំ២០០៨ អនុម័តវិនិយោគគិតជាទ្រព្យសកម្មជាប់លាប់ ក្នុងវិស័យកាត់ដេរកើន ១៣% ដល់ ៤៧.៨លានដុល្លារ ធៀបនឹងត្រីមាស មុនត្រឹម ៤២.៣លានដុល្លារ ។ ធៀបនឹងត្រីមាសទី២ ឆ្នាំ២០០៧ វាកើន ៩៧% ។ ប្រទេសចិន នៅតែជាវិនិយោគិននាំមុខគេក្នុងវិស័យកាត់ដេរនៅ កម្ពុជា ដោយរួមចំណែកបាន ៣៨% នៃអនុម័តវិនិយោគសរុប ។

Fixed asset investment approvals for the garment sector rose by 13 percent, from USD42.3 m in the previous quarter to USD47.8 m in the second quarter of 2008. Approvals increased by 97 percent from the same quarter last year. China remained a dominant player in the garment sector with 38 percent of total approvals.

នៅខែកក្កដា ២០០៨ ចំនួនភ្ញៀវសរុបមកដល់កម្ពុជា គឺ ១៤៤.២២៣នាក់ រី កើនឡើង ១០% ធៀបនឹងខែមុន ។ ចំនួនភ្ញៀវមកសំរាកលំហែកើន ១៦% ដល់ ១២៨.៥៤២នាក់ រី ភ្ញៀវមកធ្វើជំនួញកើន ៣.៤% ។

In July 2008, the number of tourist arrivals totalled 144,223, an increase of 10 percent from the preceding month. Holiday arrivals surged by 16 percent, reaching 128,542, while business arrivals rose by 3.4 percent.

នៅខែឧសភា ២០០៨ តំលៃអនុម័តគំរោងសាងសង់នៅភ្នំពេញធ្លាក់ចុះ ៨៦% ធៀបនឹងខែមុន មកត្រឹម ១៤.៣លានដុល្លារ ។ តំលៃគំរោងសាង សង់ផ្ទះល្វែងថយចុះ ៧៧% មកត្រឹម ៦.៧លានដុល្លារ ហើយតំលៃគំរោង សាងសង់ភូមិគ្រឹះ និងផ្ទះ ថយចុះ ៧៦% មកត្រឹម ៣.២លានដុល្លារ ។

In May 2008, Phnom Penh construction approvals fell by 86 percent from a month earlier, to USD14.3 m. Flat construction decreased by 77 percent to USD6.7 m, while villas and houses construction were down by 76 percent to USD3.2 m.

នៅខែកញ្ញា ២០០៨ សាំង និងម៉ាស៊ូត លក់ថ្លៃជាមធ្យម ៥០៦៣រៀល/ លីត្រ និង ៥១៣២រៀល/លីត្រ ។ ធៀបនឹងខែមុន សាំង និងម៉ាស៊ូត ចុះថ្លៃ ៧.១% និង ៧.៤% ។ ទោះយ៉ាងនេះក្តី ក្នុងប៉ុន្មានខែថ្មីៗនេះ ថ្លៃថាមពល នៅទីផ្សារកម្ពុជា ថយចុះយឺតជាខ្លាំង ធៀបនឹងថ្លៃនៅទីផ្សារអន្តរជាតិ ។

In September, gasoline sold at an average of 5063 riels/l and diesel at 5132 riels/l. Compared with the previous month, gasoline and diesel prices declined by 7.1 percent and 7.4 percent, respectively. The decline of energy prices in Cambodian market has been markedly slower than those in the international market during recent months.

នៅខែមិថុនា ២០០៨ អត្រាការប្រាក់ជាមធ្យមលើបញ្ជីជារៀលក្នុងរយៈ ១២ខែ ផ្តល់ដោយ ២៥ធនាគារនៅកម្ពុជា គឺ ៧.២៦% រីប្រហែលគ្នា នឹងអត្រាការប្រាក់កាលពីខែមុនដែរ ។ រីឯអត្រាការប្រាក់លើបញ្ជីដុល្លារ ក្នុងរយៈ១២ខែ គឺ ៥.៣២% រីកើន ០.៣% ធៀបនឹងខែមុន ។

In June, the 12-month riel deposit rate provided by 25 banks in Cambodia averaged 7.26 percent, nearly the same as in the previous month. The 12-month dollar deposit rate was 5.32 percent, 0.3 percent higher than that of the previous month.

នៅខែកញ្ញា ២០០៨ ប្រាក់រៀលធ្លាក់ថ្លៃ ០.៣% ទល់នឹងប្រាក់ដុល្លារUS ដោយប្តូរបាន ៤១១៨.៧រៀល/ដុល្លារUS ។ ទល់នឹងប្រាក់បាតថៃ ប្រាក់ រៀលឡើងថ្លៃ ១.១% ដោយប្តូរបាន ១២០រៀល/បាត តែទល់នឹងប្រាក់ដុង វៀតណាម ប្រាក់រៀលនៅថេរ ដោយប្តូរបាន ២៥រៀល/១០០ដុង ។ ទន្ទឹម គ្នានេះ ថ្លៃទំនិញតាមបណ្តាខេត្តជ្រើសរើសមួយចំនួនបានថយចុះបន្តិច ។

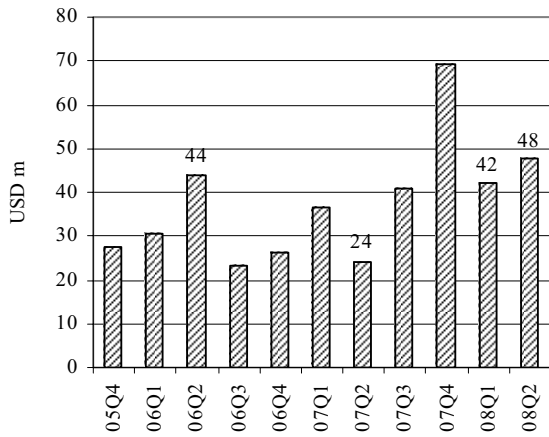
In September, the riel depreciated by 0.3 percent against the US dollar, trading at 4118.7. Against the Thai baht, the riel was up by 1.1 percent, exchanging at 120 riels/baht. The riel was stable against the Vietnamese dong at 25 per 100 dong. During the same month, prices of most selected provincial goods were down slightly.

<p>នៅខែកក្កដា ២០០៨ រូបិយវត្ថុទូទៅ (M2) នៅថេរត្រឹម ១២.៧០៧ពាន់លានរៀលដដែល ។ ប្រាក់រៀលចរាចរកើន ៣.២% ដល់ ២៤២៤.២ពាន់លានរៀល ។ ទន្ទឹមគ្នានេះ ប្រាក់បញ្ញើជាប្រភេទរៀលថយចុះ ១៣% មកត្រឹម ២៣៣.៣ពាន់លានរៀល ហើយប្រាក់បញ្ញើជាប្រភេទរូបិយវត្ថុបរទេស ថយចុះ ០.៣% មកត្រឹម ១០.០៤៩.៥ពាន់លានរៀល ។</p>	<p>Liquidity (M2) remained stable at KHR12,707 bn in July. Riels in circulation increased by 3.2 percent to KHR2424.2 bn. During the same period, riel deposits fell by 13 percent to KHR233.3 bn and foreign currency deposits dropped by 0.3 percent to KHR10,049.5 bn.</p>
<p>នៅខែមិថុនា ២០០៨ ការនាំចេញសរុបថយចុះ ៨៥% ធៀបនឹងខែមុន មកត្រឹម ៤៦.៧លានដុល្លារ ដោយសារការនាំចេញខាងកាត់ដេរ ថយចុះ ៩០% មកត្រឹម ២៦.០លានដុល្លារ ។ ការនាំចូលសរុបក៏ធ្លាក់ចុះ ៥.៥% ផងដែរ មកត្រឹម ១៤៩៩.៣ពាន់លានរៀល ។</p>	<p>In June, total exports dropped by 85 percent from the previous month, to USD46.7 m. The decline was due to the 90 percent fall of garment exports, which totalled USD26.0 m. Total imports were also down, by 5.5 percent to KHR1499.3 bn.</p>
<p>នៅខែឧសភា ២០០៨ អតិរេកថវិកាចរន្ត គឺ ១៣១.៣ពាន់លានរៀល រីឯធ្លាក់ចុះ ៥០% ធៀបនឹងខែមុន ។ ក្នុងនេះចំណូលកើន ៦.៦% ដល់ ៥០២.៤ពាន់លានរៀល រីឯចំណាយកើន ១១០% ដល់ ៣៧១.០ពាន់លានរៀល ។</p>	<p>In May, the current budget surplus was KHR131.3 bn down by 50 percent from a month earlier. Revenues and expenditures were KHR502.4 bn and KHR371.0 bn, surging by 6.6 percent and 110 percent, respectively, from the preceding month.</p>
<p>នៅខែសីហា ២០០៨ អតិរេកនៅតំបន់ឧស្សាហកម្មទាំងបី បានថយចុះ ធៀបនឹងខែមុន ។ អត្រាអតិរេកពីមួយឆ្នាំទៅមួយឆ្នាំគឺ ៥.៦% នៅUS. ៤.១% នៅតំបន់អឺរ៉ុប និង ២.៣% នៅជប៉ុន ។ ដូចគ្នាដែរ ទំនិញប្រើប្រាស់គ្រប់មុខនៅចិនបានឡើងថ្លៃ ៤.៩% ប៉ុន្តែអត្រានេះនៅទាបជាងខែមុន (៦.៣%) ។ អត្រាអតិរេកប្រចាំឆ្នាំនៅហុងកុង គឺ ៤.៦% និង កូរ៉េខាងត្បូង ៥.៦% ។ ទំនិញប្រើប្រាស់នៅម៉ាឡេស៊ីឡើងថ្លៃ ៨.៥% រីឯអតិរេកនៅថៃ និង សិង្ហបុរី គឺ ៦.៤% ដូចគ្នា ។</p>	<p>In August, inflation rates in the three industrialised regions were lower than those of the preceding month. Year-on-year inflation in the US was 5.6 percent, in the Euro zone 4.1 percent and in Japan 2.3 percent. Likewise, overall consumer prices in China were up 4.9 percent, less than the 6.3 percent of the previous month. Hong Kong's annual inflation was 4.6 percent and South Korea's 5.6 percent. Consumer prices in Malaysia were up by 8.5 percent, while in both Thailand and Singapore inflations were 6.4 percent.</p>
<p>នៅខែសីហា ២០០៨ ប្រេងឆាបន្តធ្លាក់ថ្លៃ រីឯ ពោត និងសណ្តែកស្បៀង បន្តឡើងថ្លៃ ។ នៅទីផ្សារអន្តរជាតិ ប្រេងឆាបានធ្លាក់ថ្លៃ ៤.៥% មកត្រឹម ៩៧៥.៧ដុល្លារ/តោន រីឯសណ្តែកស្បៀងបានឡើងថ្លៃ ៣.១% ដល់ ៥៤៨.៣ដុល្លារ/តោន និងពោតបានឡើងថ្លៃ ៥.៨% ដល់ ២៥៨.៨ដុល្លារ/តោន ។ ប្រេងឆៅ សាំង និង ម៉ាស៊ូត បានធ្លាក់ថ្លៃគួរកត់ឱ្យសំគាល់ ។ ថ្លៃប្រេងឆៅលក់ដល់ដៃរបស់ OPEC គឺ ១១៤ដុល្លារ/ធុង រីឯធ្លាក់ថ្លៃ ១៤% ធៀបនឹងខែមុន ។ សាំង និង ម៉ាស៊ូត លក់ថ្លៃ ៧៧សេន/លីត្រ និង ៨៥សេន/លីត្រ ។</p>	<p>In August, the price of palm oil continued to fall, while maize and soybean prices kept increasing. Palm oil's price in international markets decreased by 4.5 percent to USD975.7/tonne, while the price of soybean was up by 3.1 percent to USD548.3/tonne, and price of maize by 5.8 percent to USD258.8/tonne. Crude oil, gasoline and diesel prices showed a marked decline. The OPEC spot for crude oil was USD114/barrel, a fall of 14 percent from the previous month. Gasoline and diesel traded at US 77 cents/l and US 85 cents/l.</p>

សកម្មភាពសេដ្ឋកិច្ចសំខាន់ៗ និង ថ្លៃអំណិញនៅកម្ពុជា

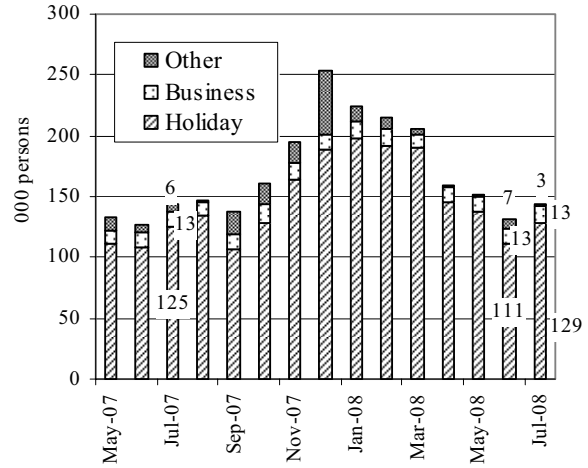
Main Economic Activities and Consumer Prices in Cambodia

**Fixed Asset Investment Approvals:
Garment Sector
2005 Q4–2008 Q2**



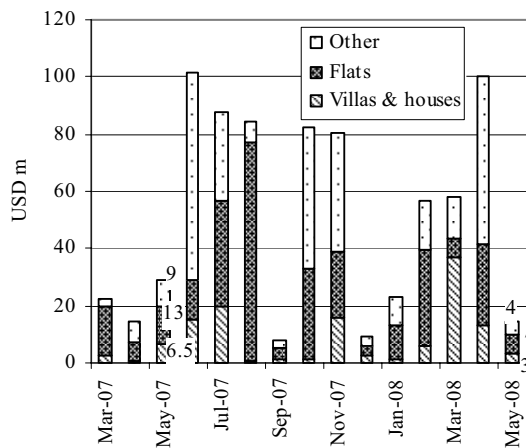
Including expansion projects.
Source: Council for the Development of Cambodia

**Cambodia: Foreign Visitor Arrivals
May 2007–July 2008**



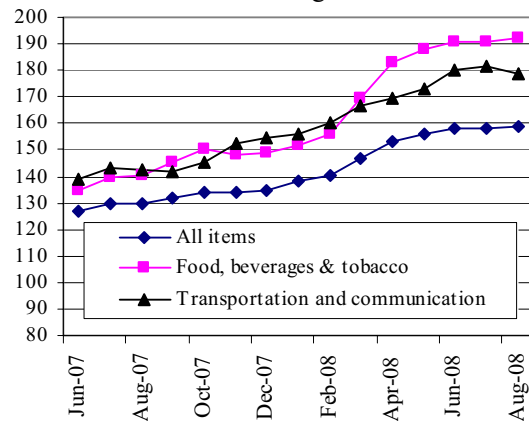
Source: Ministry of Tourism

**Phnom Penh: Value of Construction Approvals
March 2007–May 2008**



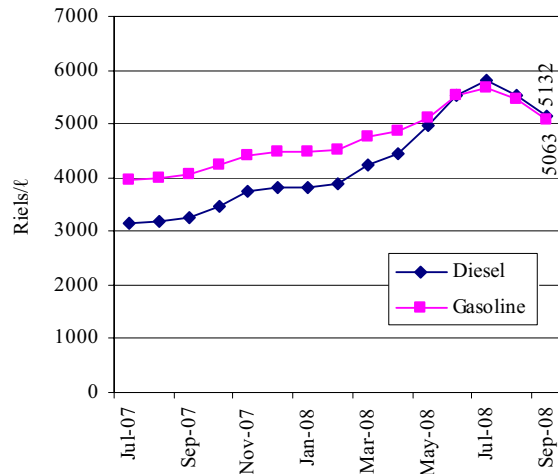
Source: Economic & Monetary Statistics, NBC

**Cambodia: Consumer Price Index
(July–December 2000=100)
June 2007–August 2008**



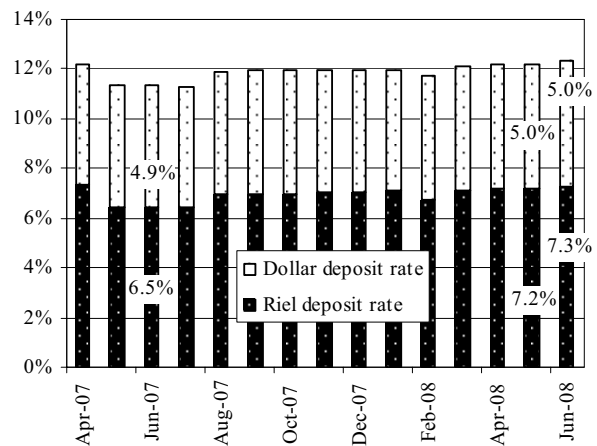
Source: National Institute of Statistics

**Phnom Penh: Gasoline & Diesel Prices
July 2007–September 2008**



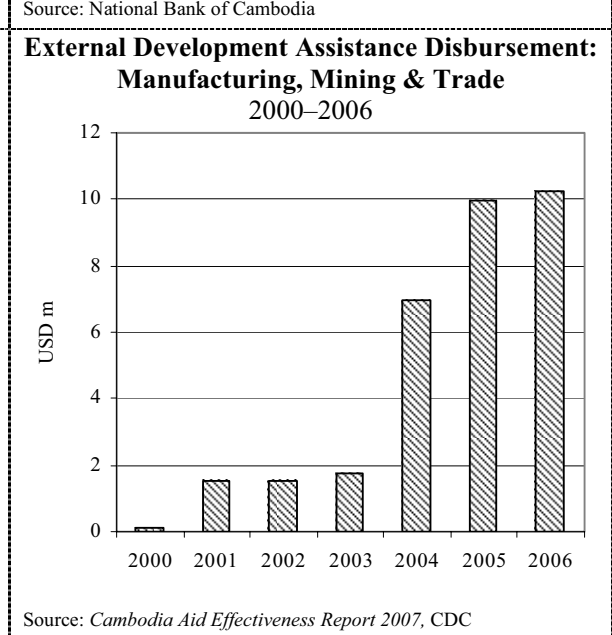
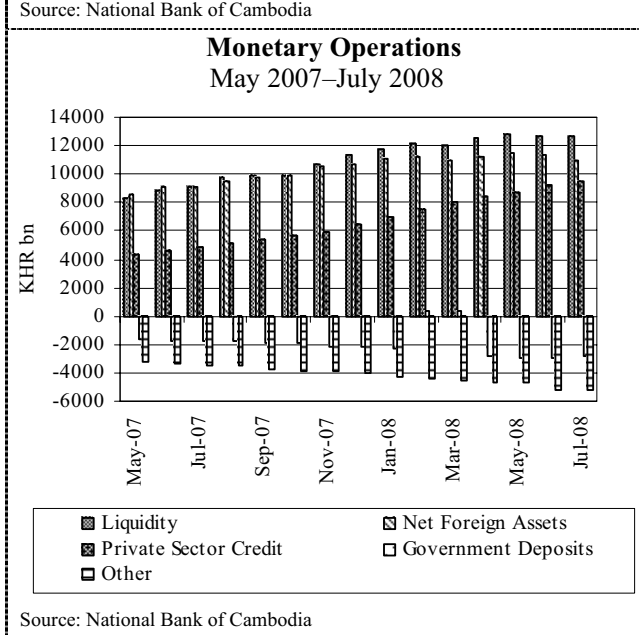
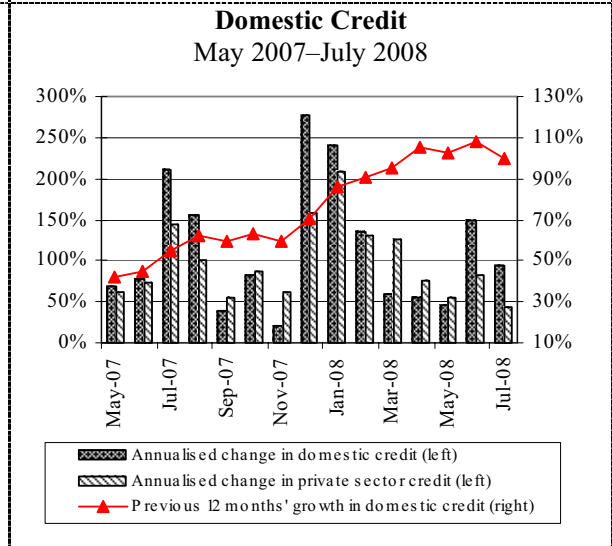
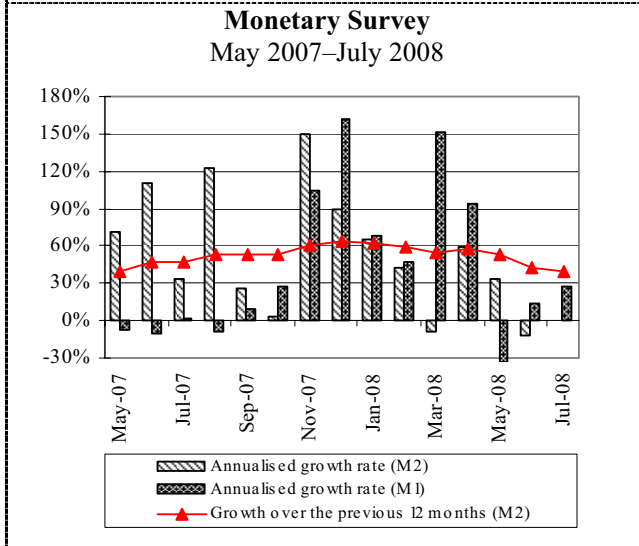
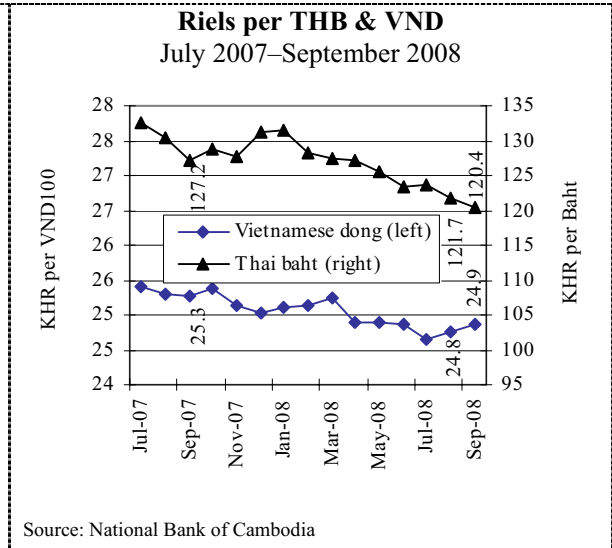
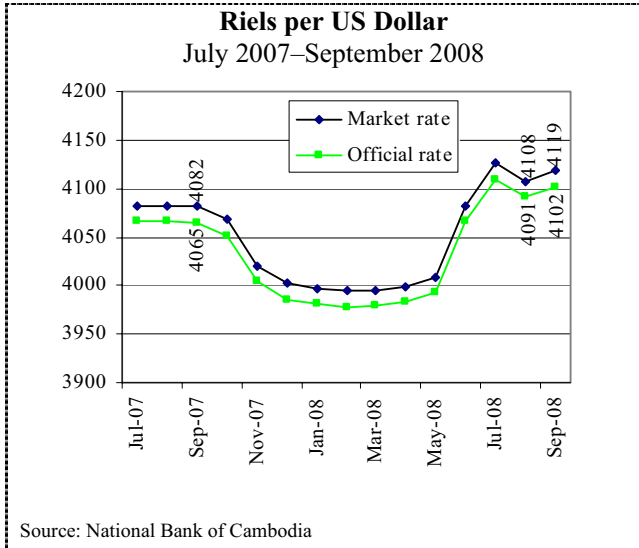
Source: CDRI

**Interest Rates on 12-Month Bank Deposits
April 2007–June 2008**



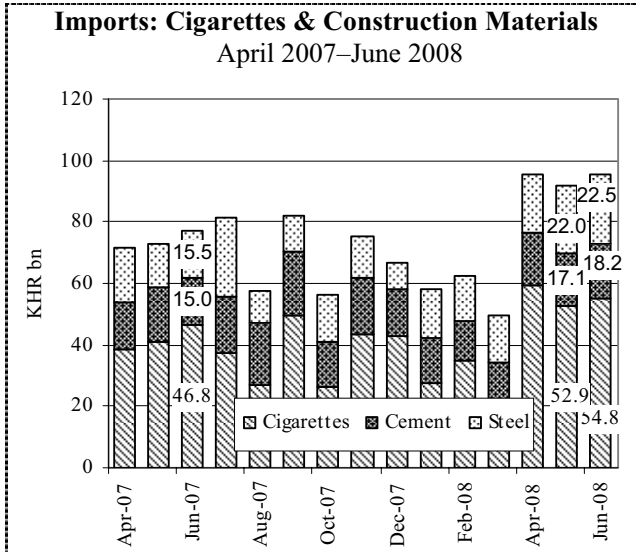
Source: Economic & Monetary Statistics, NBC

ស្ថានភាពកម្រៃប្រាក់ និង ជំនួយអភិវឌ្ឍន៍ពីក្រៅប្រទេស
Exchange Rates and External Development Assistance

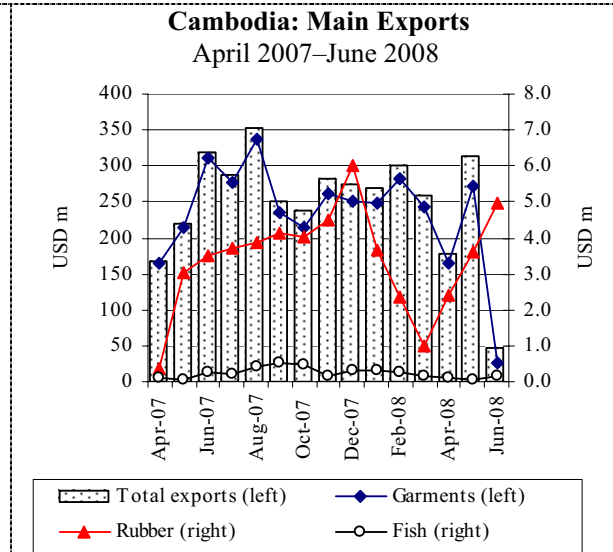


ពាណិជ្ជកម្មក្រៅប្រទេស និង ការអនុវត្តថវិកាជាតិ

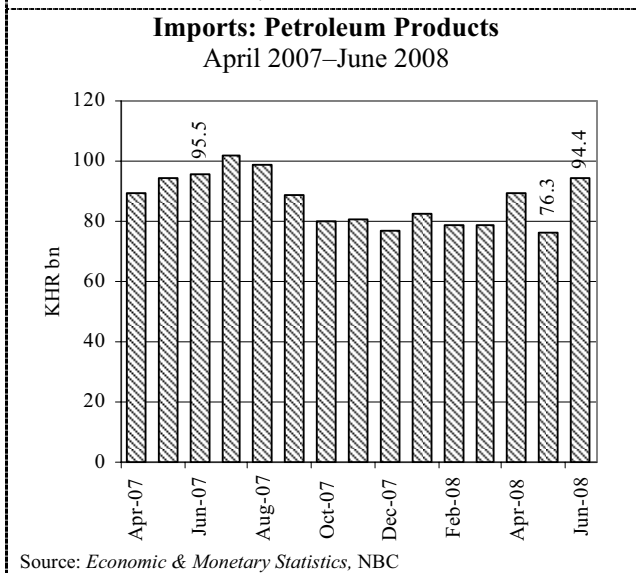
External Trade and National Budget Operations



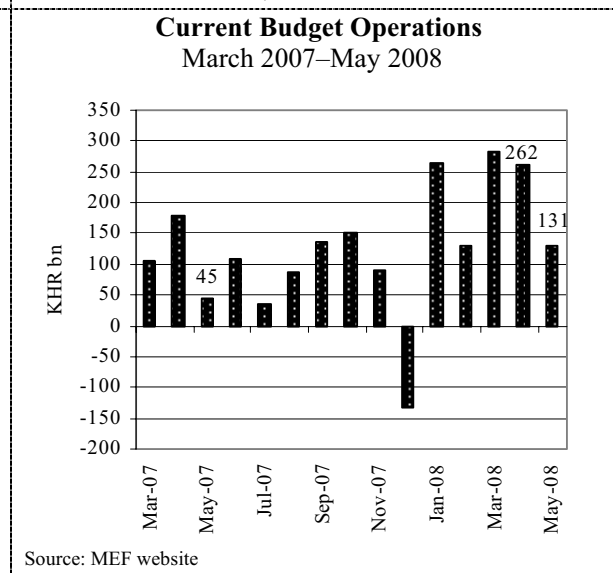
Source: Economic & Monetary Statistics, NBC



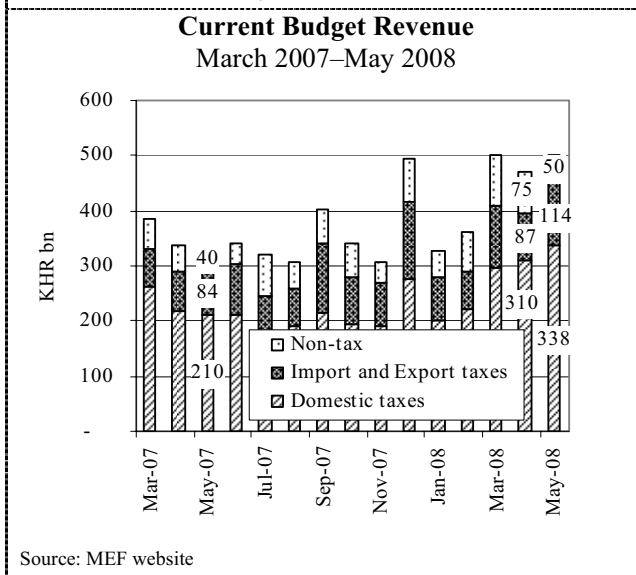
Source: Economic & Monetary Statistics, NBC



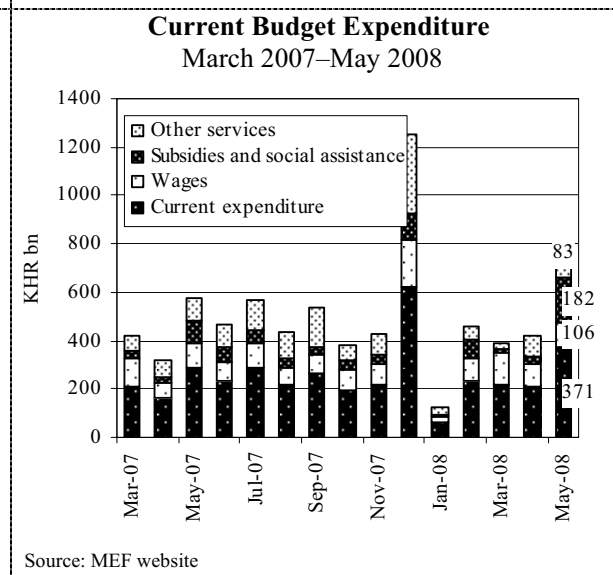
Source: Economic & Monetary Statistics, NBC



Source: MEF website

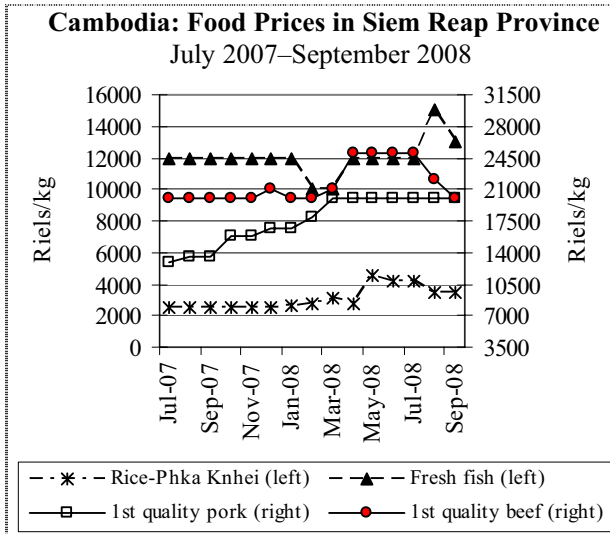


Source: MEF website

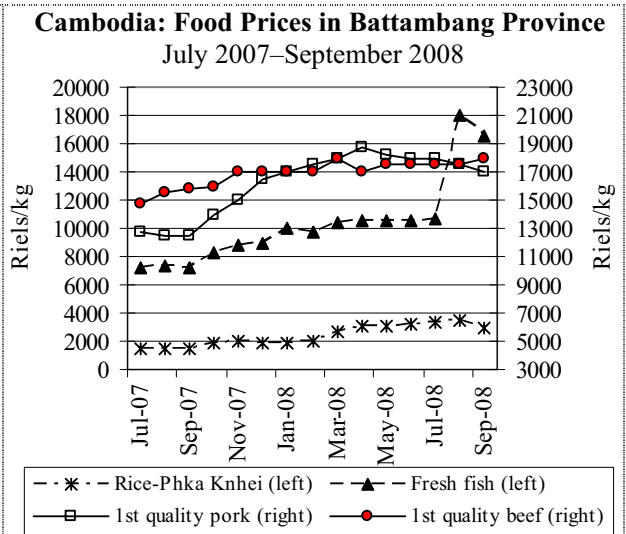


Source: MEF website

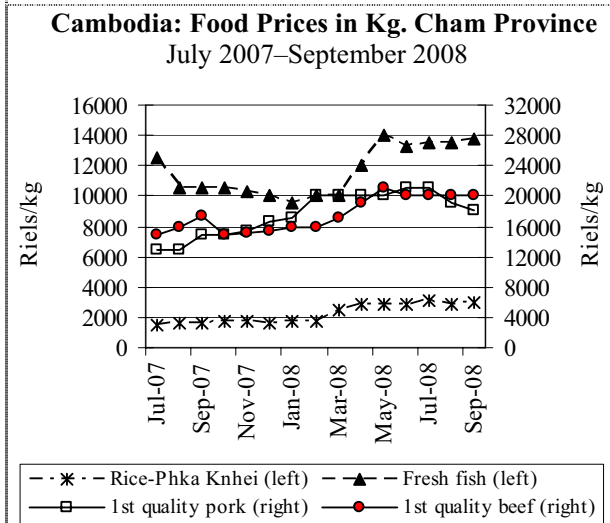
ផ្លូវជាតិលេខ៧
Provincial Food Prices



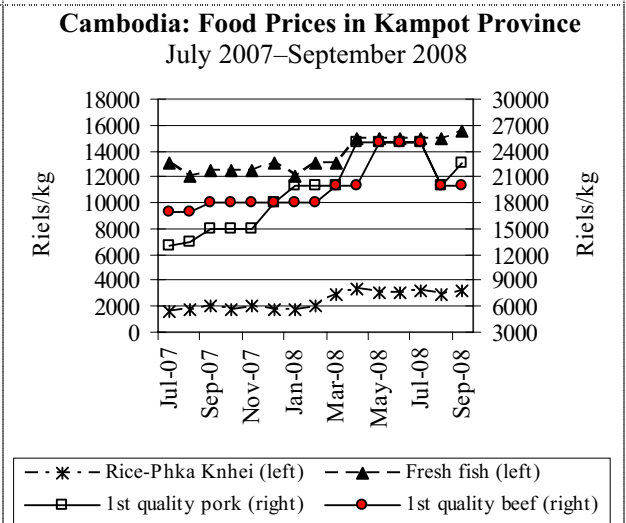
Source: CDRI



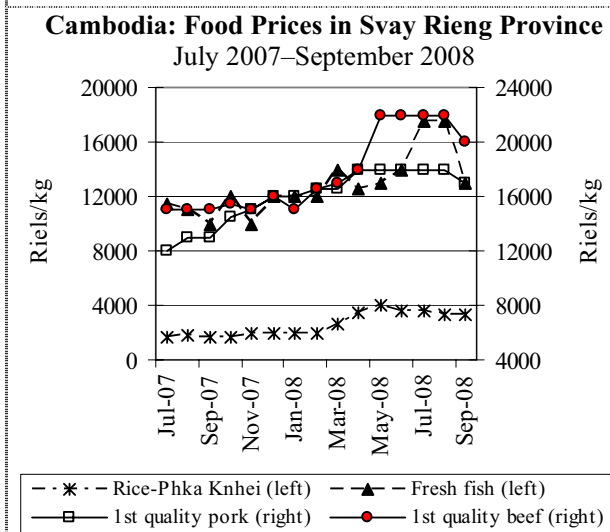
Source: CDRI



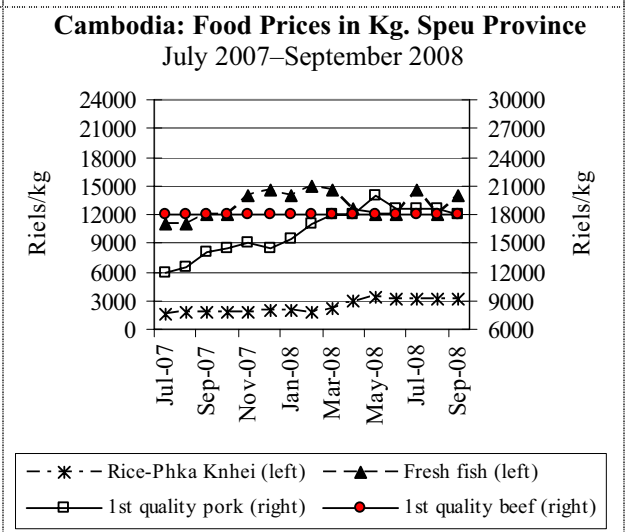
Source: CDRI



Source: CDRI



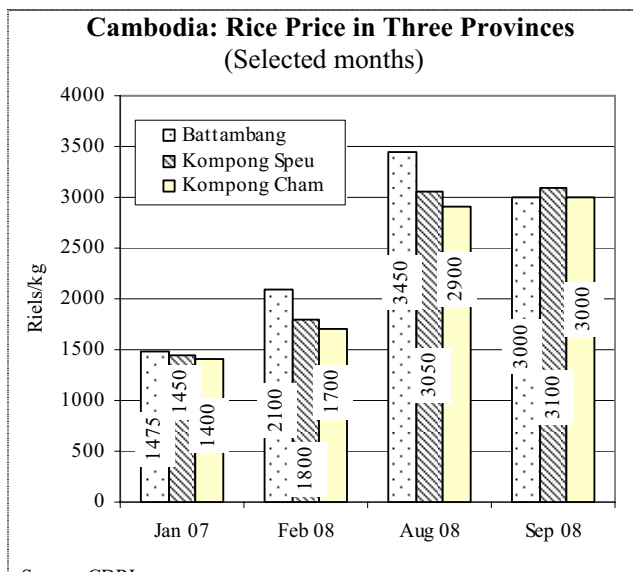
Source: CDRI



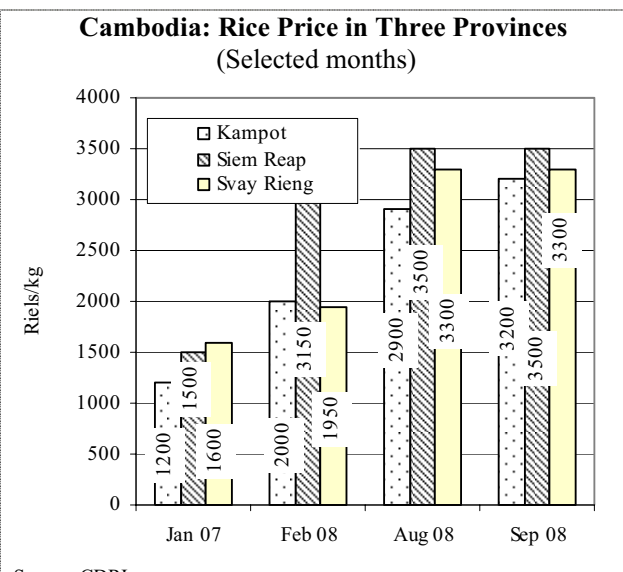
Source: CDRI

ផ្លូវដំណើរការសេដ្ឋកិច្ចប្រទេសកម្ពុជា: សាមញ្ញវិស័យ

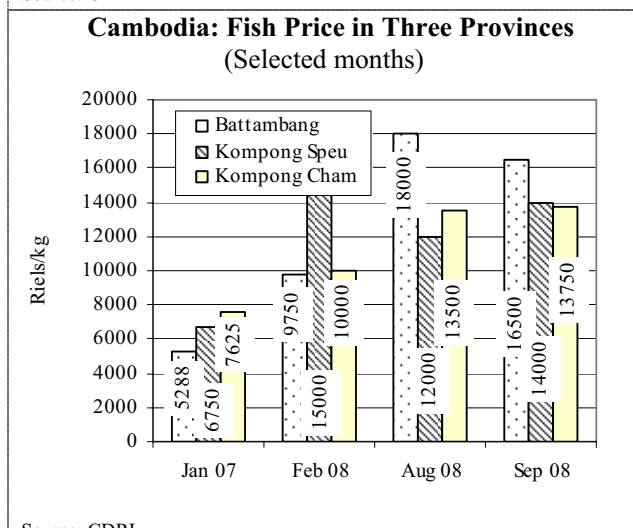
Provincial Goods Prices in Cambodia by Products



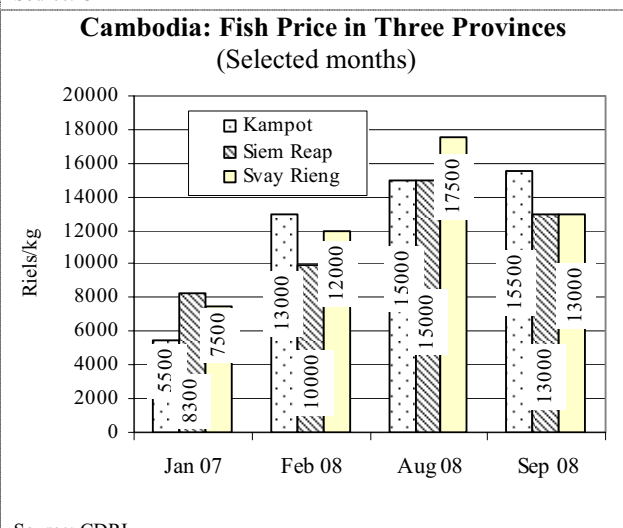
Source: CDRI



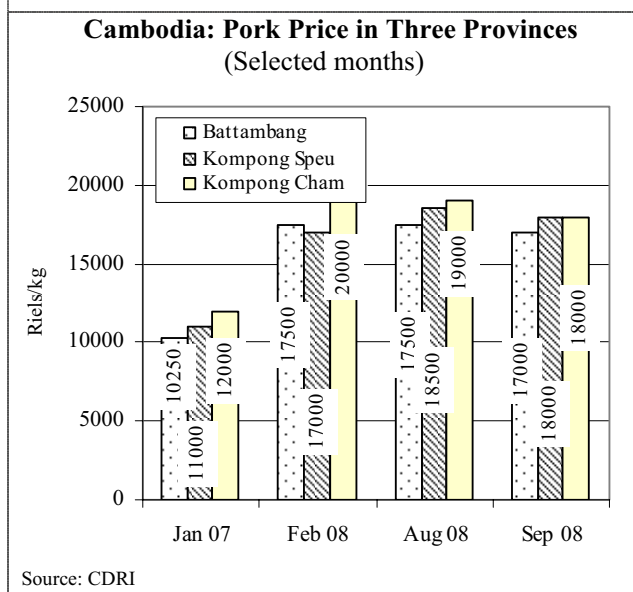
Source: CDRI



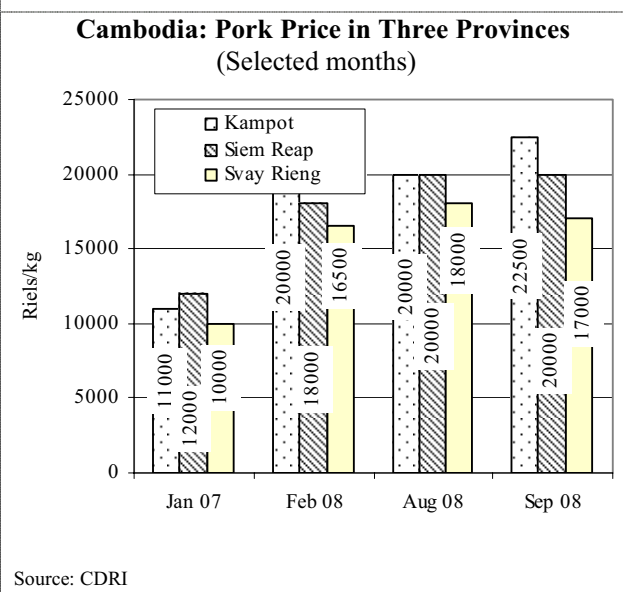
Source: CDRI



Source: CDRI



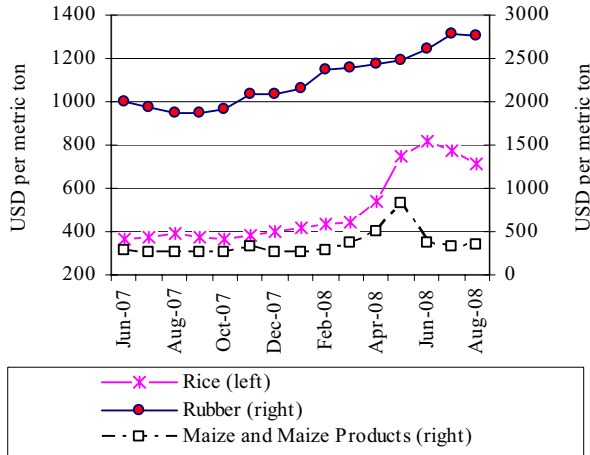
Source: CDRI



Source: CDRI

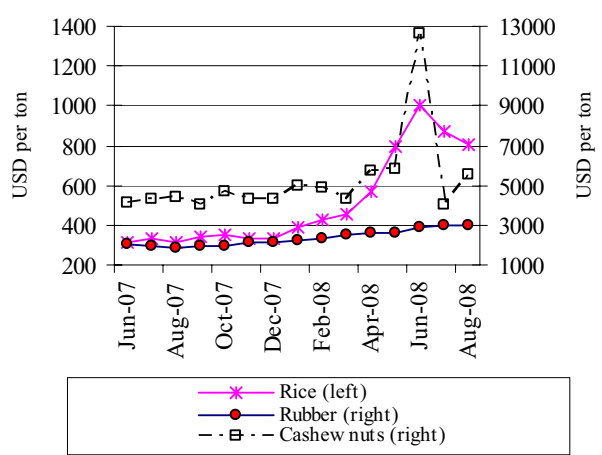
តម្លៃទំនិញ ការនាំចេញ និង ចំនួនទេសចរអន្តរជាតិ ទៅកាន់គ្រប់ប្រទេសដៃគូរបស់កម្ពុជា
Goods Prices, Exports and International Tourist Arrivals to Partners of Cambodia

Thailand: Prices of Rubber, Rice and Maize
 June 2007–August 2008



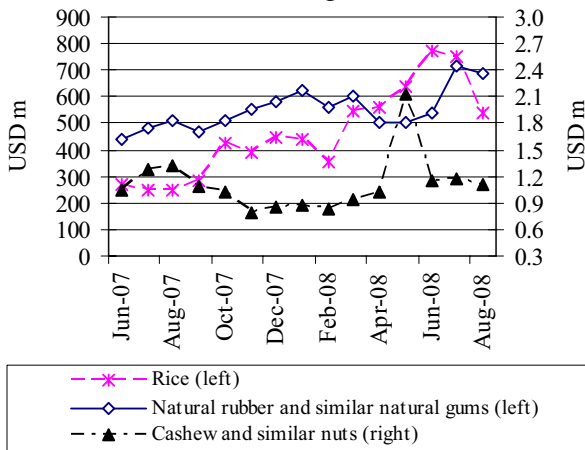
Source: Bank of Thailand, *Foreign Trade and Balance of Payments*

Vietnam: Prices of Rubber, Rice and Cashew nuts
 June 2007–August 2008



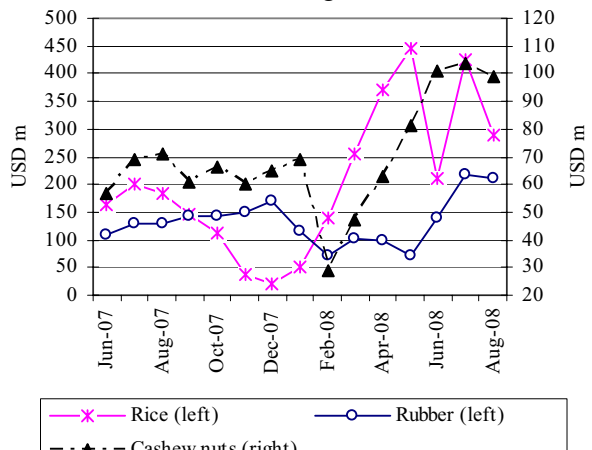
Source: General Statistics Office of Vietnam

Thailand: Exports to the World
 June 2007–August 2008



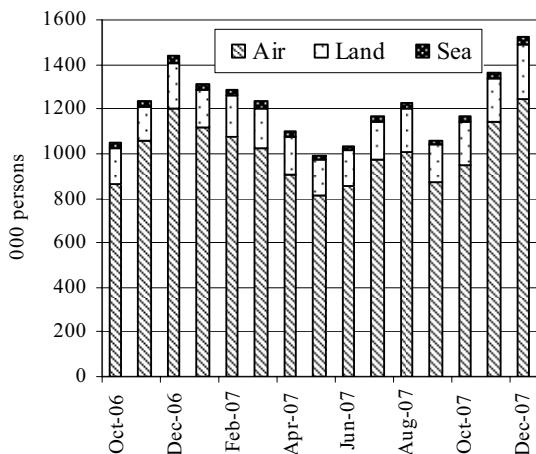
Source: Customs Department of Thailand

Vietnam: Exports to the World
 June 2007–August 2008



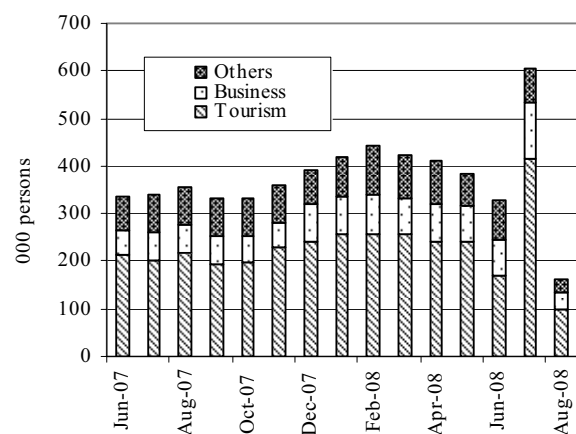
Source: General Statistics Office of Vietnam

Thailand: International Arrivals
 October 2006–December 2007*



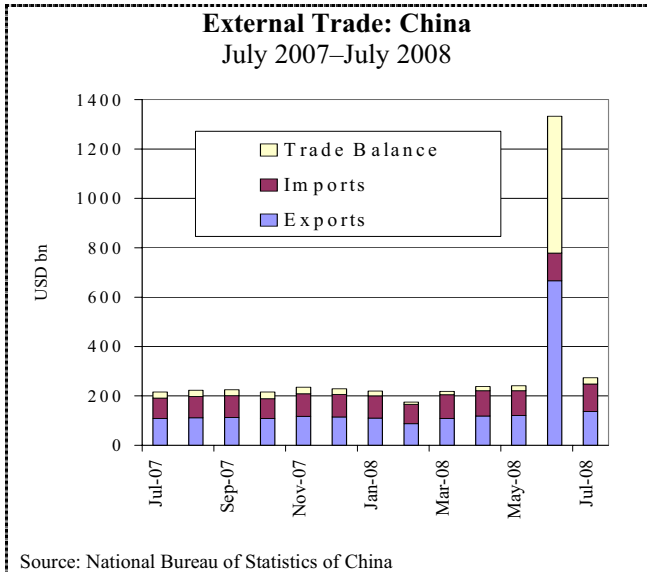
Source: Tourism Authority of Thailand
 *Data is available to December 2007.

Vietnam: International Arrivals
 June 2007–August 2008*

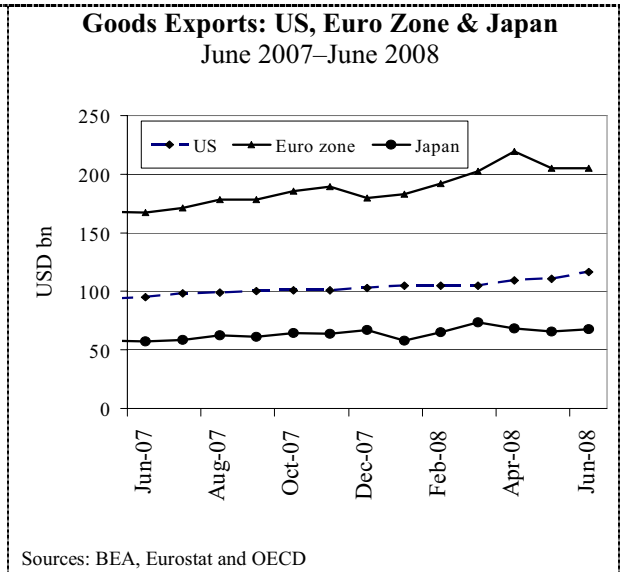


Source: General Statistics Office of Vietnam
 *Data was estimated for July and August.

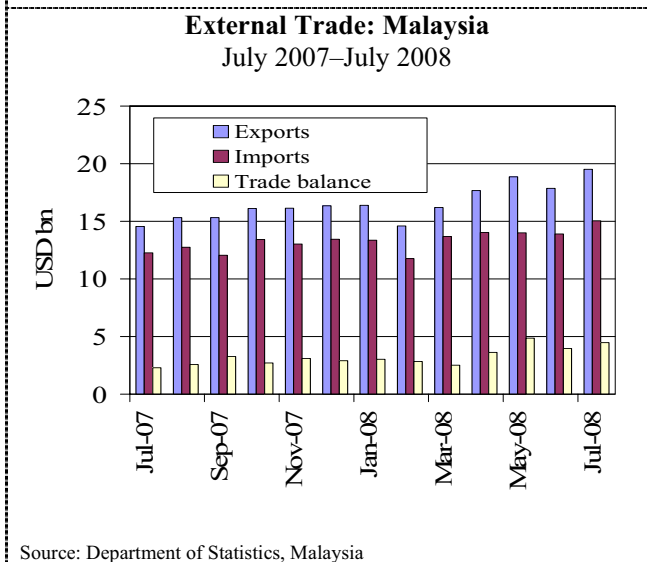
សកម្មភាពសេដ្ឋកិច្ច និង ស្ថានភាពអត្រាអន្តរជាតិជនបណ្តើរប្រទេសជាដៃគូរបស់កម្ពុជា
Economic Activity and Inflation Rates of Selected Economic Partners of Cambodia



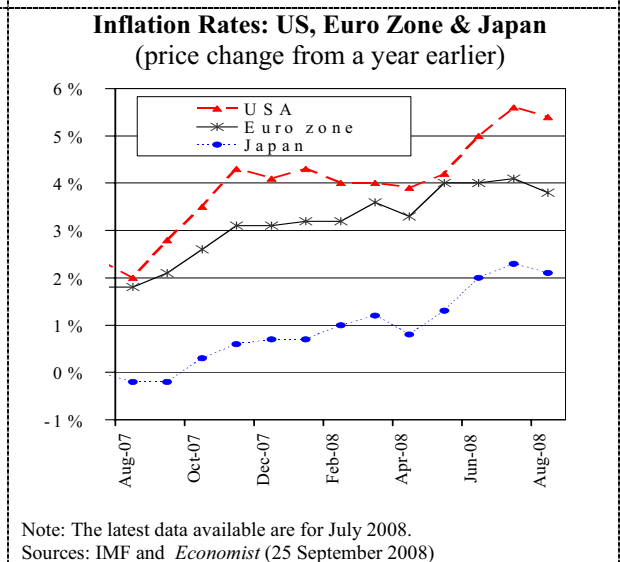
Source: National Bureau of Statistics of China



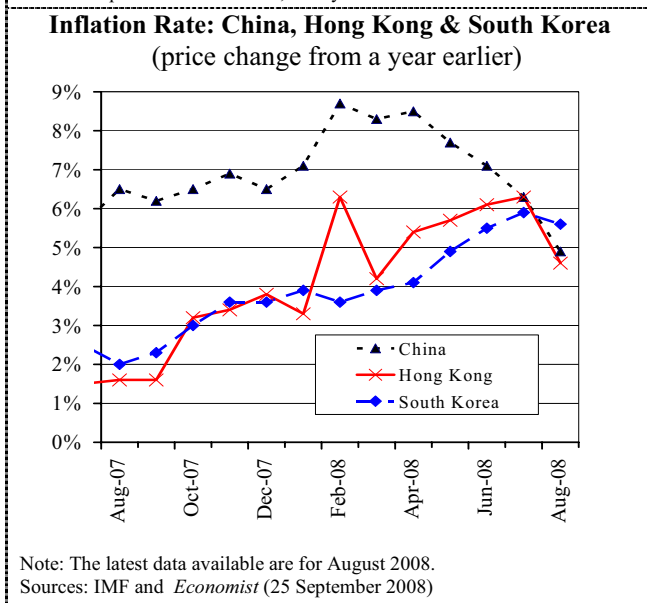
Sources: BEA, Eurostat and OECD



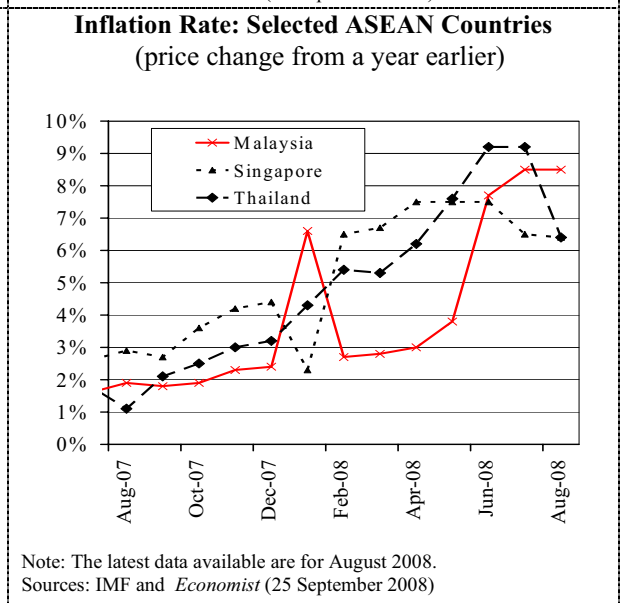
Source: Department of Statistics, Malaysia



Note: The latest data available are for July 2008. Sources: IMF and Economist (25 September 2008)

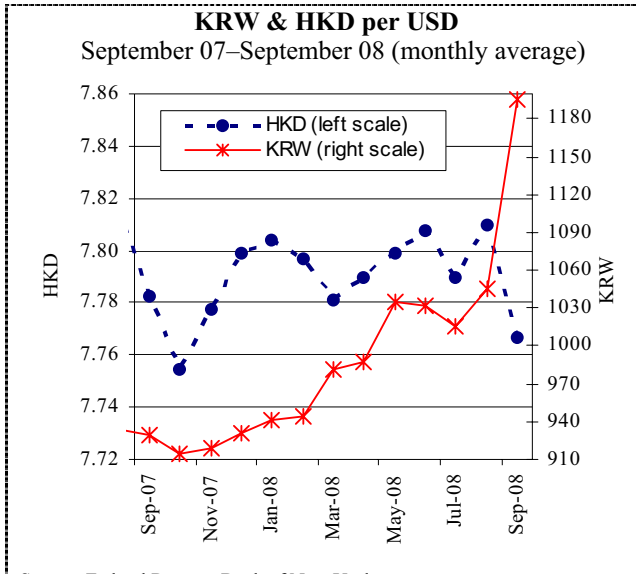


Note: The latest data available are for August 2008. Sources: IMF and Economist (25 September 2008)

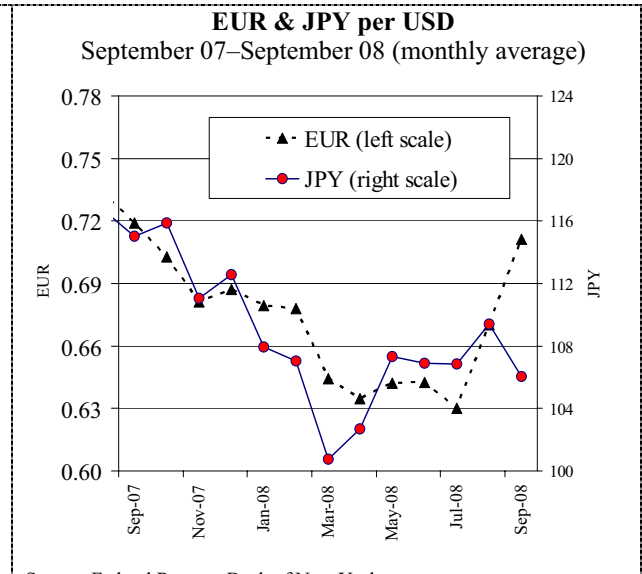


Note: The latest data available are for August 2008. Sources: IMF and Economist (25 September 2008)

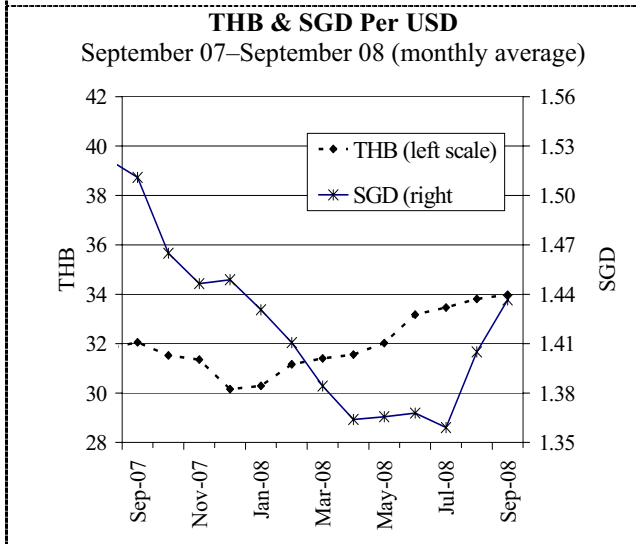
អត្រាប្តូរប្រាក់ និង គ្រួសារសាងសង់លើទំនិញលើទីផ្សារអន្តរជាតិ
Exchange Rates and Commodity Prices in World Markets



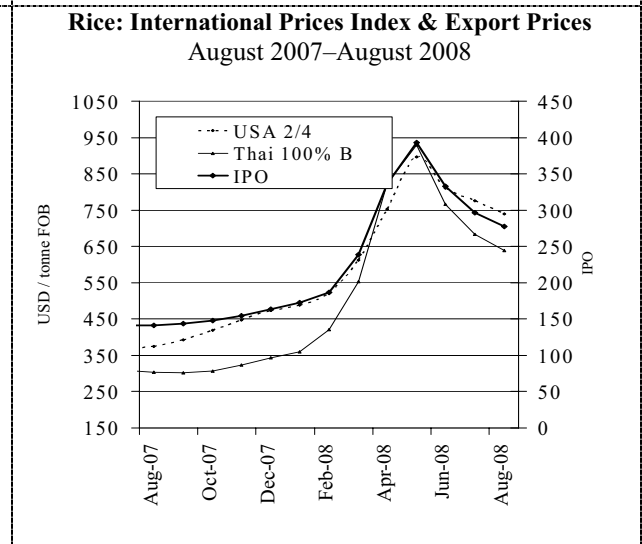
Source: Federal Reserve Bank of New York



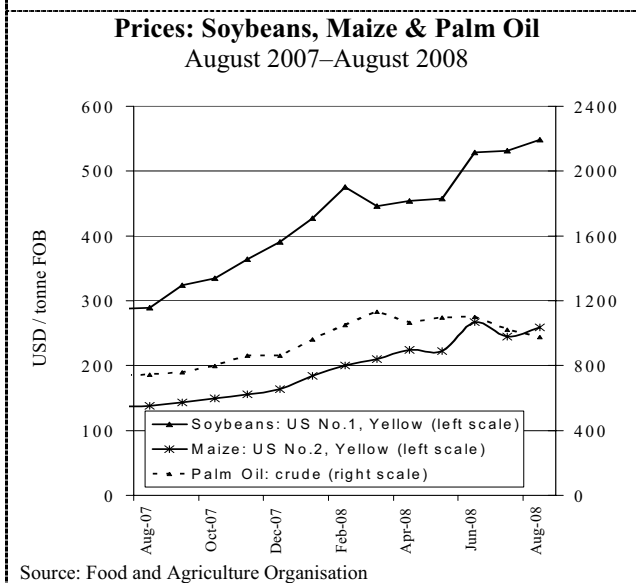
Source: Federal Reserve Bank of New York



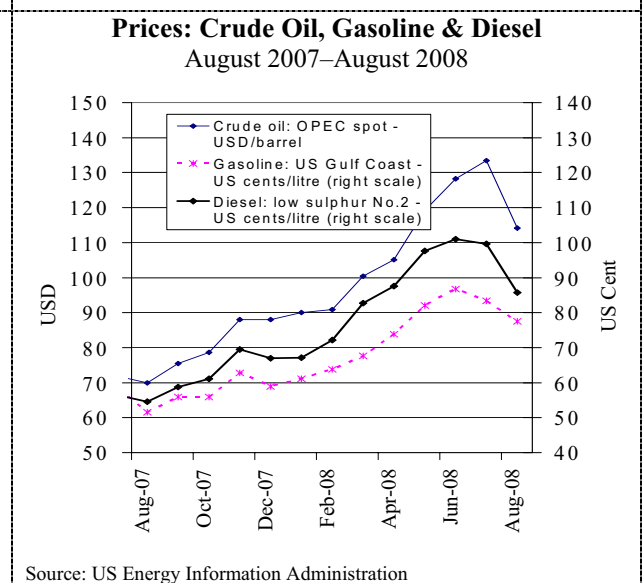
Source: Federal Reserve Bank of New York



Sources: Osiriz/InfoArroz and InterRice.



Source: Food and Agriculture Organisation



Source: US Energy Information Administration

ព័ត៌មានសេដ្ឋកិច្ច
Economic News

ព័ត៌មានសេដ្ឋកិច្ចសំខាន់ៗ:

រដ្ឋាភិបាលប្រយុទ្ធពិការបិទរោងចក្រកាត់ដេរជាច្រើន:

ឧស្សាហកម្មកាត់ដេរកម្ពុជាអាចជួបឧបសគ្គយ៉ាងធំ ពីព្រោះមានរោងចក្រជាច្រើនបានបិទទ្វារ ហើយរឿងនេះបានប៉ះពាល់យ៉ាងខ្លាំងដល់ផលិតកម្មនិងសេដ្ឋកិច្ចកម្ពុជា ។ ការបិទរោងចក្រកាត់ដេរ បណ្តាលជាសំខាន់មកពីកម្មករបានធ្វើបាតុកម្មច្រើនលើកពេក ដែលធ្វើឱ្យម្ចាស់រោងចក្រគ្មានជំរើសអ្វីផ្សេងក្រៅពីការបិទរោងចក្រ ។ លោក ជាតិ ខេមរា មន្ត្រីជាន់ខ្ពស់ខាងពលកម្មនៃ សមាគមរោងចក្រកាត់ដេរកម្ពុជា (GMAC) បានបញ្ជាក់ថា “ក្នុងឆ្នាំនេះ ចាប់ពីខែមករា ដល់កក្កដា សមាជិក GMAC ចំនួន ៩ រោងចក្របានបិទទ្វារដោយសារមូលហេតុជាច្រើន ដូចជា ការទាមទារប្រាក់ខែខ្ពស់ ពីសំណាក់កម្មករ និងការមិនអាចបំពេញតាមការទាមទារ ។ មកទល់ខែកក្កដា ២០០៨ កូដកម្មមានរហូតដល់ ៧៩ដង ដែលច្រើនគួរឱ្យបារម្ភបើធៀបនឹងពេញមួយឆ្នាំមុនដែលមានត្រឹមតែ ៨០ដង” ។ ទាក់ទងនឹងវិធានការដែលរដ្ឋាភិបាលបានដាក់ចេញ ដើម្បីដោះស្រាយបញ្ហាដែលធ្វើឱ្យកម្មករជាច្រើននាក់បាត់បង់ការងារ លោក ខេមរា បានលើកថា “អាជ្ញាធរគ្រោងបង្កើតច្បាប់ថ្មីស្តីពីអង្គការសហជីព ។ រដ្ឋាភិបាលកំពុងខិតខំកែលម្អមធ្យោបាយប្រាស្រ័យទាក់ទងរវាងមន្ត្រីក្រុមហ៊ុន និងសហជីព ព្រមទាំងជំរុញឱ្យមានគំរោងវិនិយោគថ្មីទៀត” ។ ឧស្សាហកម្មកាត់ដេរក៏កំពុងខិតខំស្វែងរកទីផ្សារថ្មីសំរាប់ផលិតផលកម្ពុជា ដើម្បីអាចរកចំនូលជាប្រយោជន៍បរទេសបានច្រើន” ។ នៅកម្ពុជា មានកម្មករជិត ៣៥០.០០០នាក់ កំពុងធ្វើការក្នុងរោងចក្រកាត់ដេរនាបច្ចុប្បន្ន ។ (ប្រភព: Fibre2Fashion)

Economic News Highlights:

Government shows concern over shutdowns in garment units: The apparel industry of Cambodia is under threat of running into deep trouble as many factories are pulling their shutters down, which is affecting production and thereby the economy of the country. The main reason for the closure of garment companies is innumerable strikes of workers, leaving owners no option other than shutting their units. Mr Cheat Khemara, senior labour officer, Garment Manufacturers Association of Cambodia (GMAC) stated: “This year from January to July, nine member factories of GMAC have closed down. There are various reasons which have led to the closure, which include workers demanding high wages and unfulfilled demands. Till July 2008 there have been almost 79 strikes, which is alarming when compared to full last year’s total of 80.” When asked what steps the government is taking to overcome this situation, which has left large number of workers unemployed, Mr Khemara asserted: “The authorities are planning to establish new laws concerning union organisations. The government is making efforts to improve the means of communication between company officials and the unions and encourage new investment plans.” The senior labour officer further divulged, “The garment industry is also making efforts to explore new markets for Cambodian products so that it can earn large amounts of foreign currency”. There are nearly 350,000 workers associated with the garment industry nationwide. (Source: Fibre2Fashion)

Links to other economic news:

- 1. “Peace, prosperity revive dream of connecting Asia by rail”
(http://afp.google.com/article/ALeqM5gn_zE7TVpQMzMAj1Iiyp2u1nAiHQ)