



វិទ្យាស្ថានបណ្តុះបណ្តាល និង ស្រាវជ្រាវដើម្បីអភិវឌ្ឍន៍កម្ពុជា
Cambodia Development Resource Institute—CDRI

របាយការណ៍ខ្លីៗស្តីពីសេដ្ឋកិច្ចកម្ពុជា
Flash Report on the Cambodian Economy

កុម្ភៈ ២០១៥/February 2015

ស្រី បុប្ផារត្ន/Sry Bopharath

ប៉ុន ជូរីណា/Pon Dorina

បកប្រែដោយ៖ យូសិទ្ធិវិទូ និង ខេងសេង

ភ្នំពេញកម្ពុជា

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 ; *email:* pubs@cdri.org.kh; *website:* <http://www.cdri.org.kh>

នាំចេញ និងនាំចូល កើន ៤៥,៩% (ធ្លាក់ចុះ ១១,៦% ធៀបឆ្នាំមុន)។ ចំណូលមិនមែនពន្ធ កើន ១៤៩,៦% ធៀបខែមុន (២២,៤% ធៀបឆ្នាំមុន)។ នៅខែដដែលនេះ ចំណាយចរន្ត កើន ៨៣,៧% ធៀបខែមុន (៧,៣% ធៀបឆ្នាំមុន)។ ចំណាយលើបៀវត្សរ៍ កើន ៤០,៩% ធៀបខែមុន ប៉ុន្តែធ្លាក់ចុះ ១៦,៨% ធៀបឆ្នាំមុន។ ឧបត្ថម្ភធន និងជំនួយសង្គមកិច្ច រួមចុះ ១៤,៦% ធៀបខែមុន (៤៣,១% ធៀបឆ្នាំមុន)។

នៅខែមករា អង្ករថៃ ឡើងថ្លៃ ១៦,៩% ធៀបខែមុន ប៉ុន្តែធ្លាក់ថ្លៃ ០,៤% ធៀបឆ្នាំមុន។ កៅស៊ូ ធ្លាក់ថ្លៃ ៣,៥% (៣៥,៧% ធៀបឆ្នាំមុន)។ ម្សៅដំឡូងឈើ ឡើងថ្លៃ ១,២% (៦,០% ធៀបឆ្នាំមុន)។ អង្កររៀតណាម នៅថៃ ធៀបខែមុន ប៉ុន្តែឡើងថ្លៃ ១,៨% ធៀបឆ្នាំមុន។ កៅស៊ូ ធ្លាក់ថ្លៃ ៤,៨% ធៀបខែមុន (៣១,៣% ធៀបឆ្នាំមុន)។ គ្រាប់ស្វាយចន្ទី ធ្លាក់ថ្លៃ ១,៧% ធៀបខែមុន។

នៅខែមករាដដែល ការនាំចេញអង្ករថៃ ធ្លាក់ចុះ ៥១,៨% ធៀបខែមុន (១៣,០% ធៀបឆ្នាំមុន) ការនាំចេញកៅស៊ូ និងជីវធម្មជាតិ ធ្លាក់ចុះ ១៣,៧% (៤០,៦% ធៀបឆ្នាំមុន) ហើយការនាំចេញម្សៅដំឡូងឈើ ធ្លាក់ចុះ ២៣,៨% (១៥,៧% ធៀបឆ្នាំមុន)។ ការនាំចេញអង្កររៀតណាម នៅថៃ ធៀបខែមុន ប៉ុន្តែធ្លាក់ចុះ ៣,៤% ធៀបឆ្នាំមុន។ ការនាំចេញកៅស៊ូ ធ្លាក់ចុះ ១២,៨% ធៀបខែមុន ប៉ុន្តែកើន ១៦,៣% ធៀបឆ្នាំមុន។ ការនាំចេញគ្រាប់ស្វាយចន្ទី ធ្លាក់ចុះ ២១,៣% ធៀបខែមុន ប៉ុន្តែកើន ២៥,០% ធៀបឆ្នាំមុន។

នៅខែមករា សន្ទស្សន៍ថ្លៃអង្ករអន្តរជាតិ ធ្លាក់ចុះ ០,៩% ធៀបខែមុន ឬធ្លាក់ ១,៣% ធៀបឆ្នាំមុន។ អង្ករសហរដ្ឋអាមេរិក ធ្លាក់ថ្លៃ ១,៩% ធៀបខែមុន និង ១៤,២% ធៀបឆ្នាំមុន។ អង្ករថៃ ឡើងថ្លៃ ០,៥% ធៀបខែមុន ប៉ុន្តែធ្លាក់ថ្លៃ ៧,០% ធៀបឆ្នាំមុន។ នៅខែមករា ដដែល សណ្តែកសៀងនៅសហរដ្ឋ អាមេរិក ធ្លាក់ថ្លៃ ៨,៥% ធៀបខែមុន ឬធ្លាក់ ២៦,៥% បើធៀបឆ្នាំមុន។ ពោត ធ្លាក់ថ្លៃ ២,០% (១១,៦% ធៀបឆ្នាំមុន)។ ប្រេងឆា ធ្លាក់ថ្លៃ ៦,៣% ធៀបខែមុន (២៥,៨% ធៀបឆ្នាំមុន)។ កៅស៊ូ ធ្លាក់ថ្លៃ ៣,១% ធៀបខែមុន (៣៣,៤% ធៀបឆ្នាំមុន)។

នៅខែមករា ប្រេងឆៅ ឡើងថ្លៃ ២៣,៨% ធៀបខែមុន ប៉ុន្តែធ្លាក់ថ្លៃ ៤៧,៩% ធៀបឆ្នាំមុន មកត្រឹម ៥៤,៩ដុល្លារ/ធុង។ ម៉ាស៊ូត ឡើងថ្លៃ ២៦,១% ធៀបខែមុន ប៉ុន្តែធ្លាក់ថ្លៃ ៤០,៥% ធៀបឆ្នាំមុន មកត្រឹម ០,៤២ដុល្លារ/លីត្រ។ សាំង ឡើងថ្លៃ ១៩,១% ធៀបខែមុន ប៉ុន្តែធ្លាក់ថ្លៃ ៣៨,៧% ធៀបឆ្នាំមុន។

year, to KHR1218.1 bn. Revenue from domestic taxes rose 59.0 percent (11.1 percent year on year) and from import and export taxes 45.9 percent (but fell 11.6 percent from a year earlier). Non-tax revenue escalated 149.6 percent from a month earlier (22.4 percent year on year). In the same month, current expenditure increased 83.7 percent (7.3 percent year on year). Expenditure on wages rose by 40.9 percent from the previous month, but was 16.8 percent lower than a year earlier. Subsidies and social assistance contracted by 14.6 percent from a month earlier (43.1 percent year on year).

In January, the price of Thai rice increased by 16.9 percent from a month earlier, but was 0.4 percent lower than a year earlier. The price of rubber dropped 3.5 percent, or 35.7 percent year on year. The price of tapioca increased by 1.2 percent (6.0 percent year on year). Vietnamese rice was stable compared with the previous month but increased 1.8 percent year on year. The rubber price was 4.8 percent lower than a month earlier (31.3 percent year on year). The cashew nuts price dropped 1.7 percent from the preceding month.

In the same month, exports of Thai rice declined 51.8 percent from a month earlier (13.0 percent year on year), of natural rubber and gums 13.7 percent (40.6 percent year on year) and of tapioca 23.8 percent (15.7 percent year on year). Vietnamese rice exports remained unchanged from the preceding month but dropped 3.4 percent year on year. Exports of rubber declined 12.8 percent from a month earlier, but rose 16.3 percent year on year. Exports of cashew nuts decreased 21.3 percent from the preceding month, but grew 25.0 percent year on year.

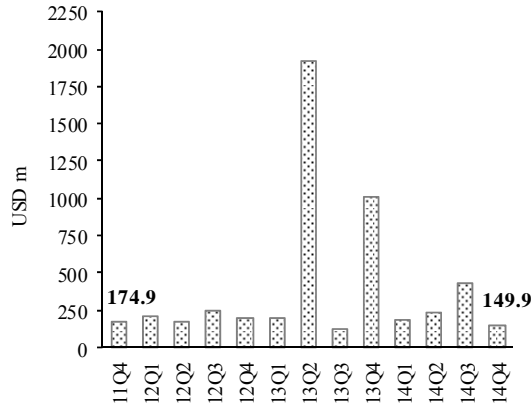
In January, the IPO rice price index dropped 0.9 percent from a month earlier and 1.3 percent year on year. The price of USA rice dropped 1.9 percent compared to the previous month and 14.2 percent year on year. The price of Thai rice rose by 0.5 percent in the month but dropped 7.0 percent year on year. In January, the price of US soybeans decreased 8.5 percent from a month earlier or 26.5 percent year on year. The price of maize decreased 2.0 percent (11.6 percent year on year). Palm oil declined by 6.3 percent from the previous month (25.8 percent year on year). Rubber shrank 3.1 percent from a month earlier (33.4 percent year on year).

In January, the price of crude oil grew 23.8 percent but dropped 47.9 percent from a year earlier to USD54.9/barrel. The price of diesel fuel rose by 26.1 percent but decreased 40.5 percent year on year to USD0.42/litre. The price of gasoline increased 19.1 percent from a month earlier, but dropped 38.7 percent year on year.

សកម្មភាពសេដ្ឋកិច្ចសំខាន់ៗ និង ថ្លៃទំនិញនៅកម្ពុជា

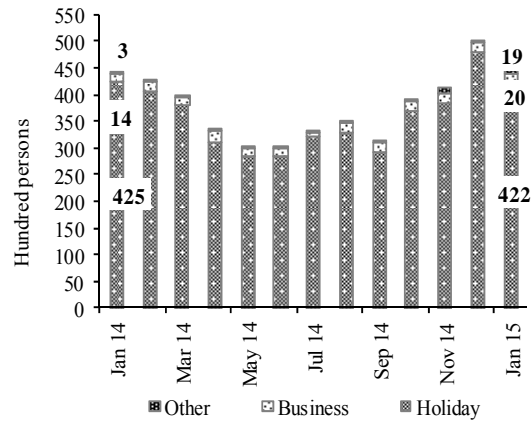
Main Economic Activities and Consumer Prices in Cambodia

Fixed Asset Investment Approvals by CDC*
Industry
2011 Q4–2014 Q4



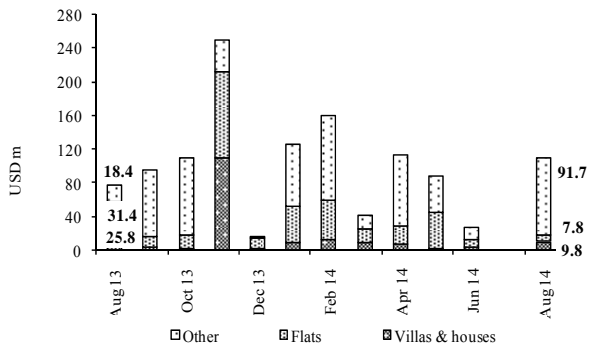
*Including expansion projects.
Source: Council for the Development of Cambodia

Foreign Visitor Arrivals
January 2014–January 2015



Source: Ministry of Tourism

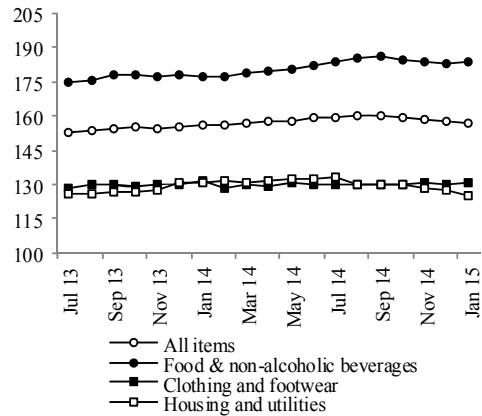
Phnom Penh: Value of Construction Approvals
August 2013–August 2014



Note: Data not available for July 2014

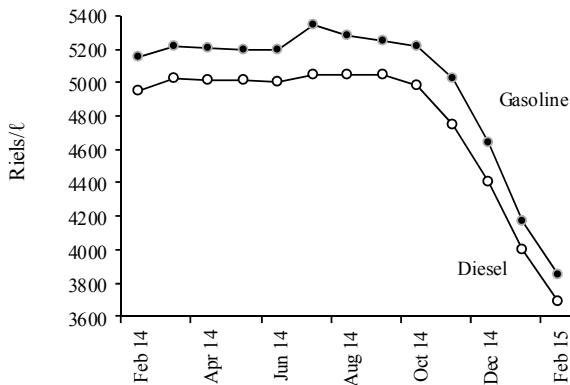
Source: Municipality of Phnom Penh

Consumer Price Index
(December 2006=100)
July 2013–January 2015



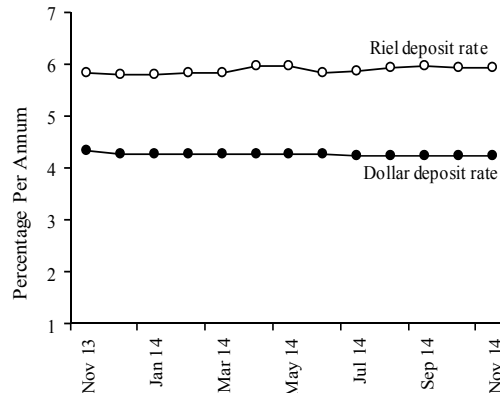
Source: National Institute of Statistics

Phnom Penh: Gasoline & Diesel Prices
February 2014–February 2015



Source: CDRI

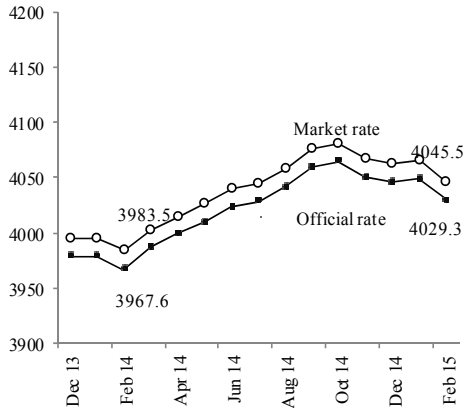
Interest Rates on 12-Month Bank Deposits
November 2013–November 2014



Source: Economic & Monetary Statistics, NBC

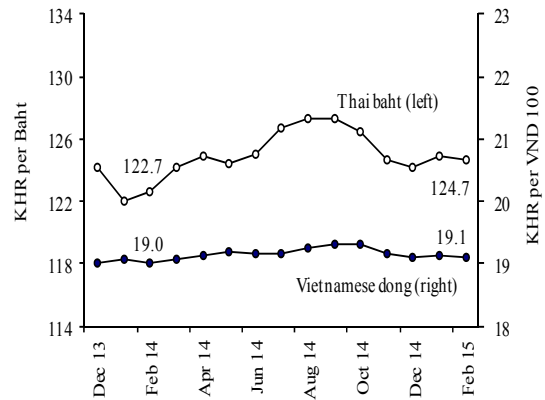
អត្រាប្តូររូបិយប័ណ្ណ និង ឥណទាន
Exchange Rates, Money and Credit

Riels per US Dollar
 December 2013–February 2015



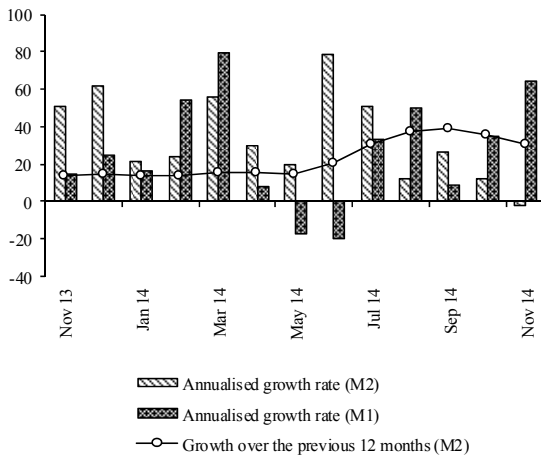
Source: National Bank of Cambodia

Riels per THB & VND
 December 2013–February 2015



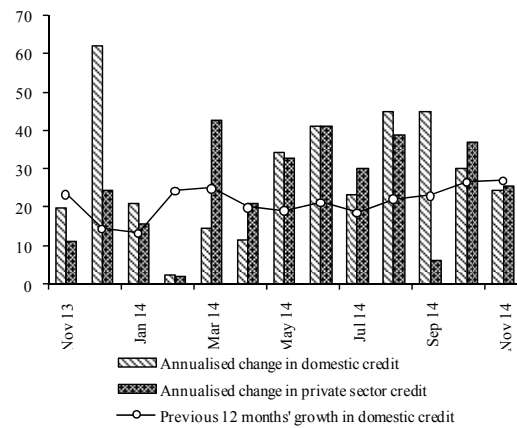
Source: National Bank of Cambodia

Monetary Survey (%)
 November 2013–November 2014



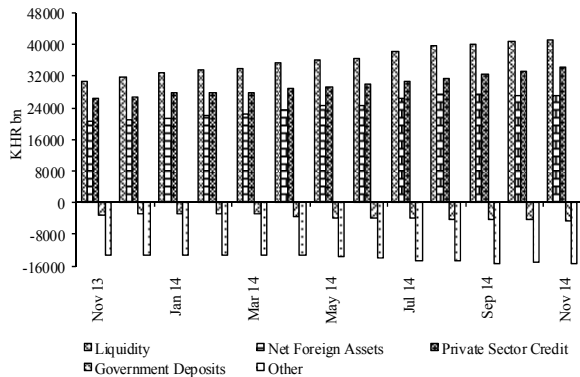
Source: National Bank of Cambodia

Domestic Credit (%)
 November 2013–November 2014



Source: National Bank of Cambodia

Monetary Survey
 November 2013–November 2014



Source: National Bank of Cambodia

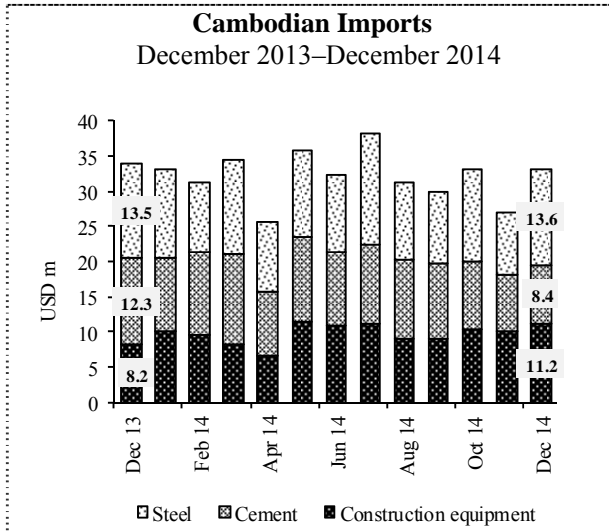
External Development Assistance Disbursement
 Health
 2005–2015



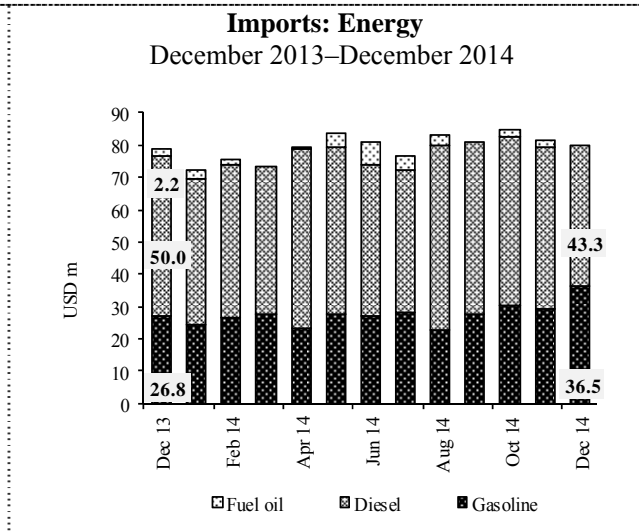
Source: CRDB/CDC 2014 (projection)

ពាណិជ្ជកម្មក្រៅប្រទេស និង ការអនុវត្តថវិកាជាតិ

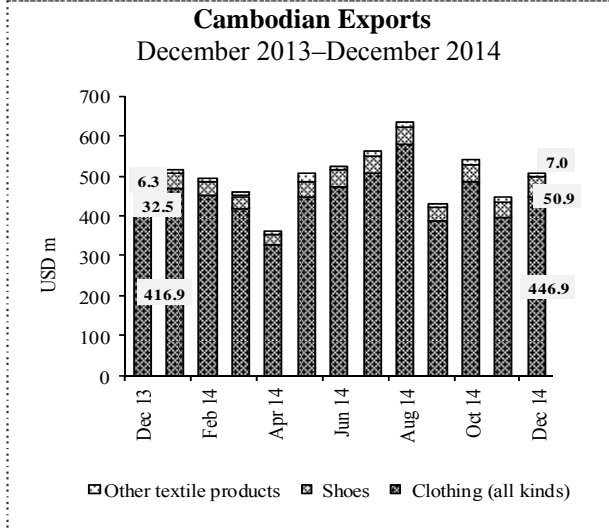
External Trade and National Budget Operations



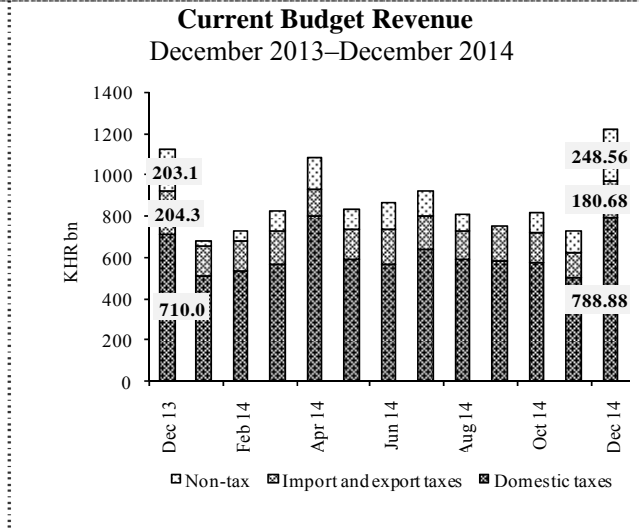
Source: Economic & Monetary Statistics, NBC



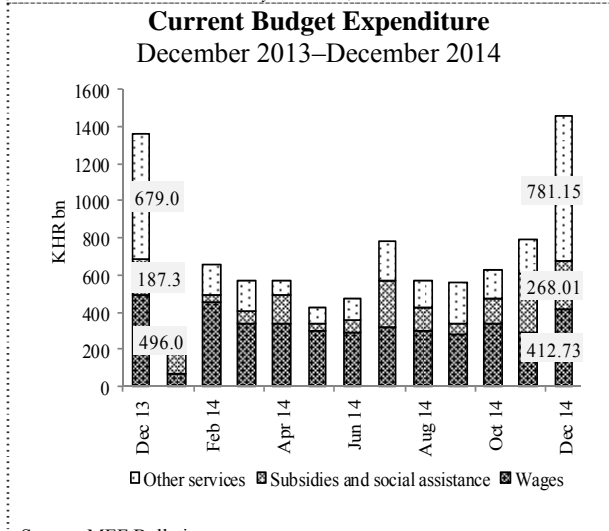
Source: Economic & Monetary Statistics, NBC



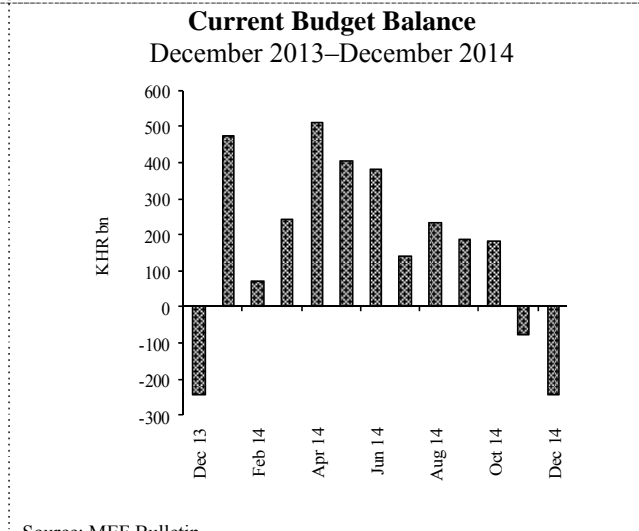
Source: Economic & Monetary Statistics, NBC



Source: MEF Bulletin



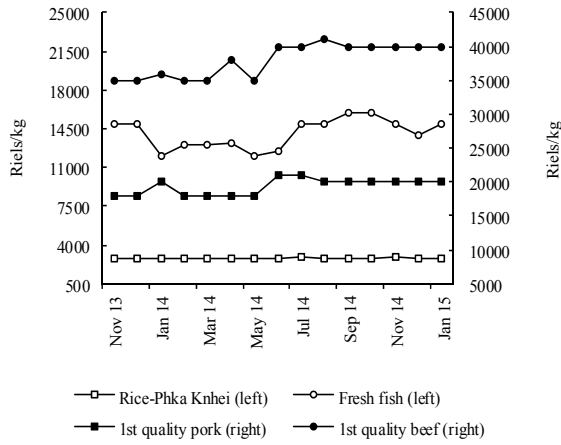
Source: MEF Bulletin



Source: MEF Bulletin

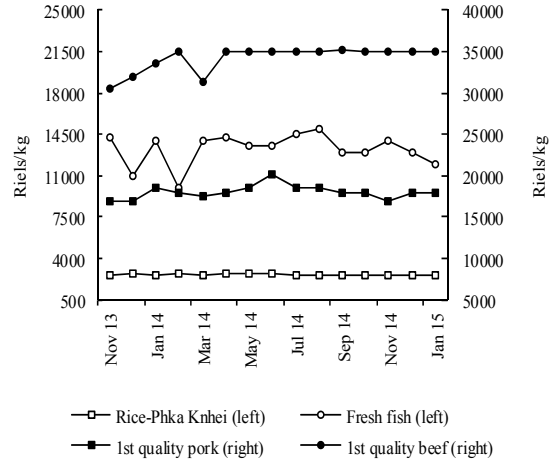
ផ្លូវស្បៀងអាហារតាមខេត្តក្នុងប្រទេសកម្ពុជា
Provincial Food Prices

Food Prices in Siem Reap Province
 November 2013–January 2015



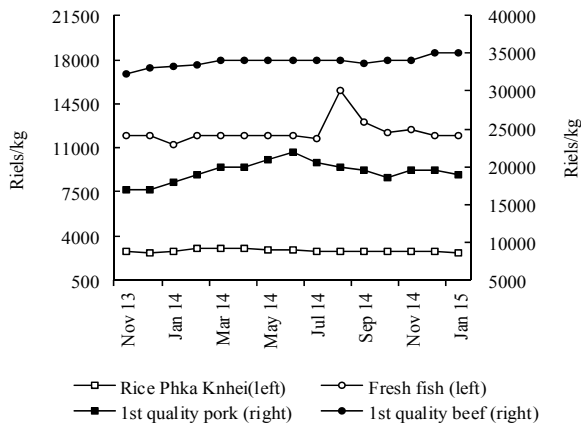
Source: CDRI

Food Prices in Battambang Province
 November 2013–January 2015



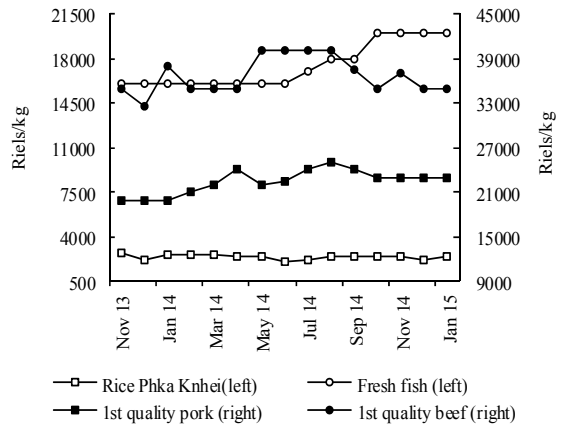
Source: CDRI

Food Prices in Kompong Cham Province
 November 2013–January 2015



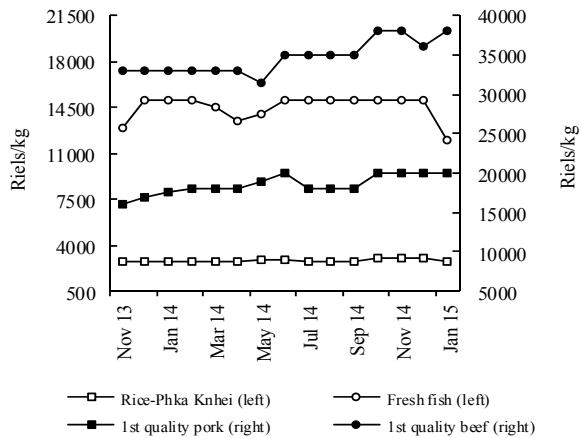
Source: CDRI

Food Prices in Kampot Province
 November 2013–January 2015



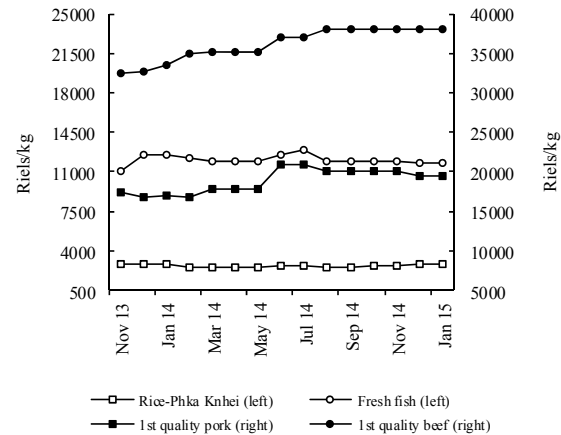
Source: CDRI

Food Prices in Svay Rieng Province
 November 2013–January 2015



Source: CDRI

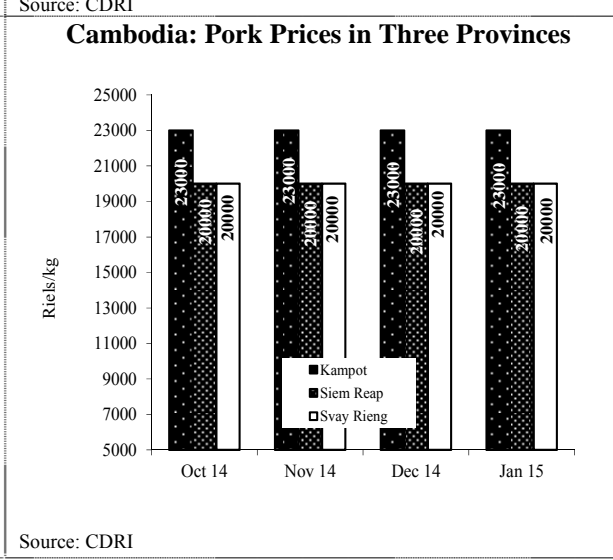
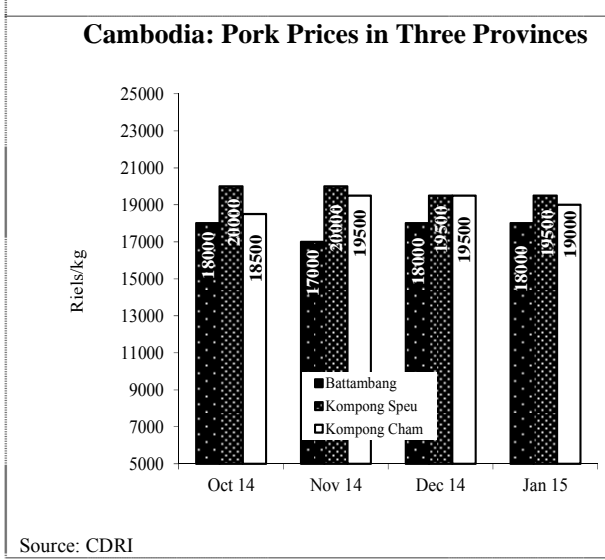
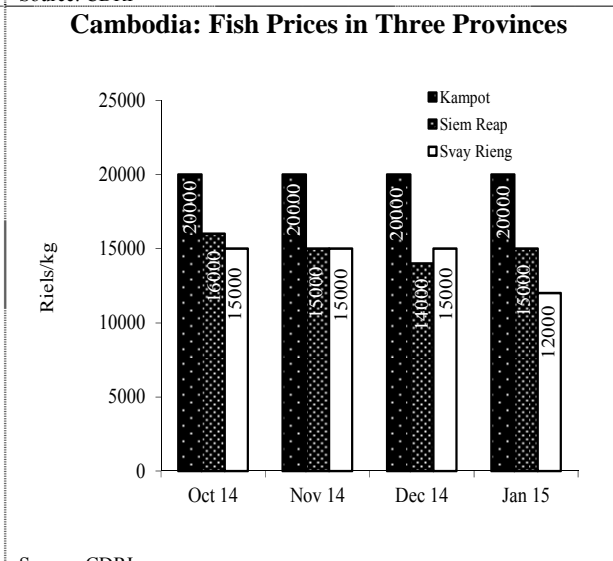
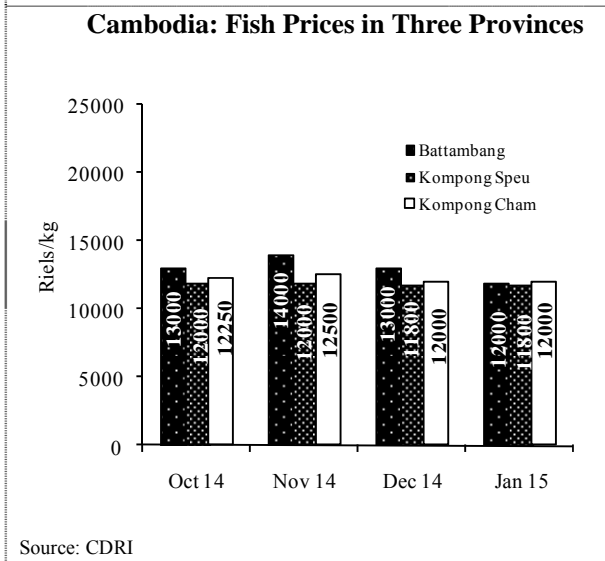
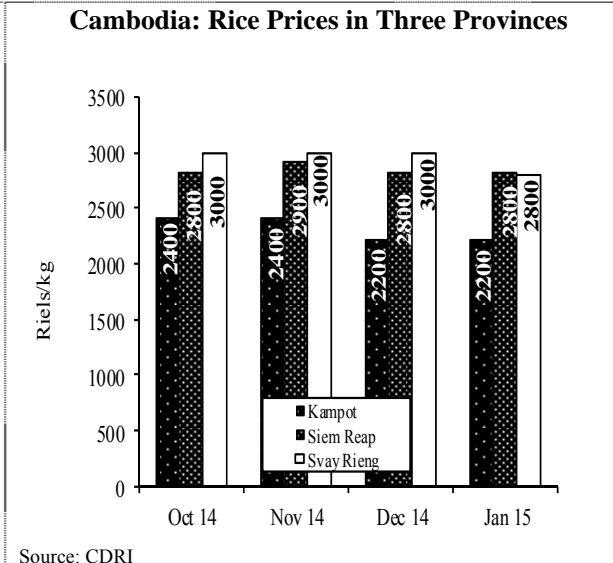
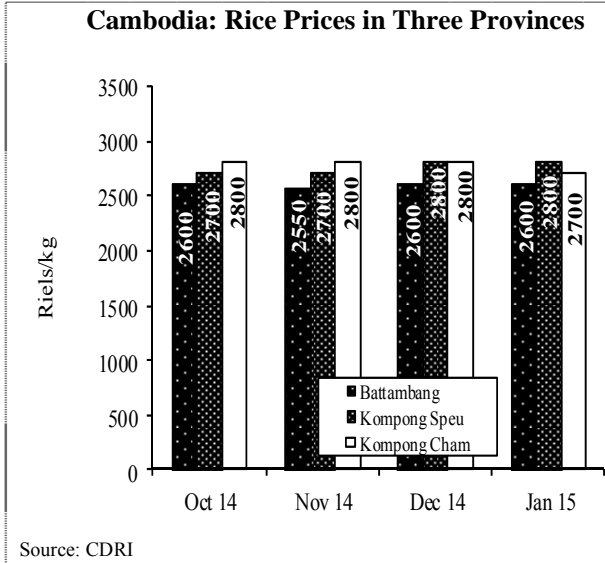
Food Prices in Kompong Speu Province
 November 2013–January 2015



Source: CDRI

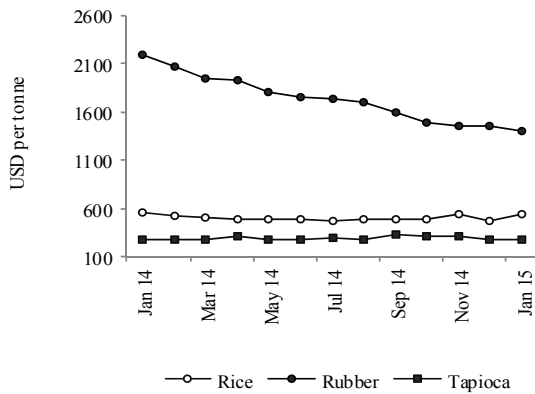
តម្លៃទំនិញសាមញ្ញក្នុងប្រទេសកម្ពុជា៖ តាមរដ្ឋខ្មែរ

Provincial Goods Prices in Cambodia



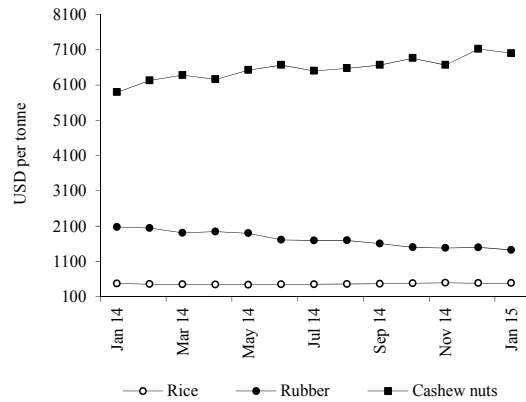
ផ្លែដំណើរ ការនាំចេញ និង ចំនួនទេសចរអន្តរជាតិទៅដល់ប្រទេសជាដៃគូរបស់កម្ពុជា
Goods Prices, Exports and International Tourist Arrivals to Partners of Cambodia

Thailand: Prices of Rubber, Rice and Tapioca
January 2014–January 2015



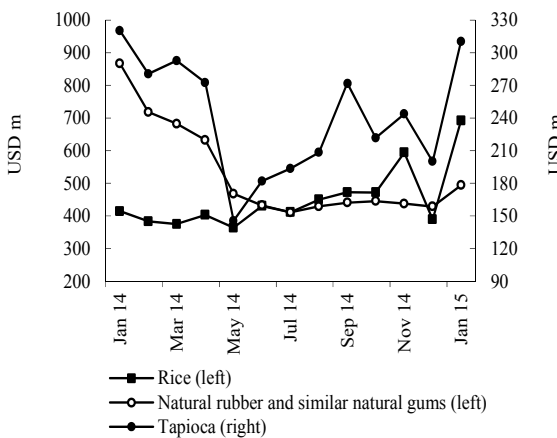
Source: Bank of Thailand, *Foreign Trade and Balance of Payments*

Vietnam: Prices of Rubber, Rice and Cashew Nuts
January 2014–January 2015



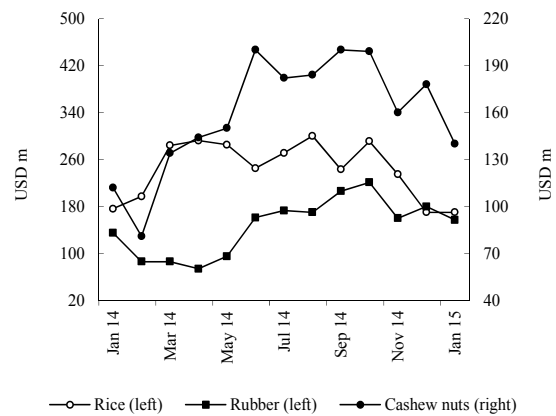
Source: General Statistics Office of Vietnam

Thailand: Exports
January 2014–January 2015



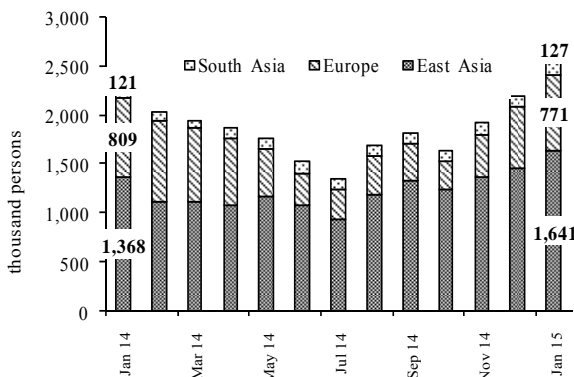
Source: Customs Department of Thailand

Vietnam: Exports
January 2014–January 2015



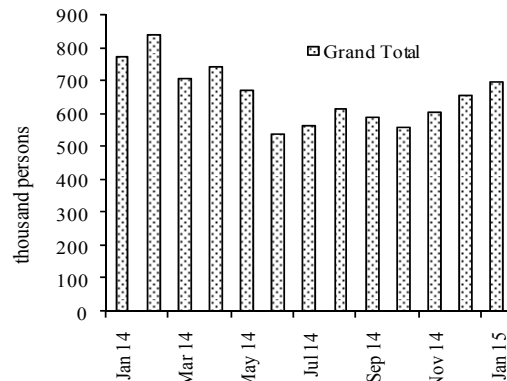
Source: General Statistics Office of Vietnam

Thailand: International Arrivals
January 2014–January 2015



Source: Thailand Office of Tourism Development

Vietnam: International Arrivals
January 2014–January 2015

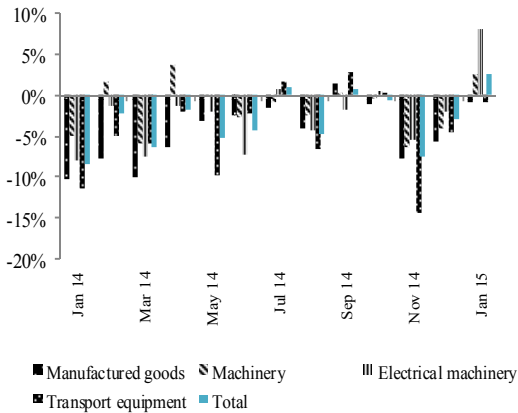


Source: Estimates by General Statistics Office of Vietnam

សកម្មភាពសេដ្ឋកិច្ច និង អត្រាអតិថិជននៅបណ្តាប្រទេសជាដៃគូរបស់កម្ពុជា

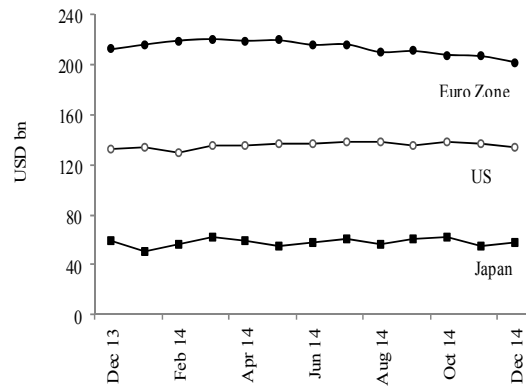
Economic Activity and Inflation Rates of Selected Economic Partners of Cambodia

Year-on-Year Growth of Main Exports: Japan
January 2014–January 2015



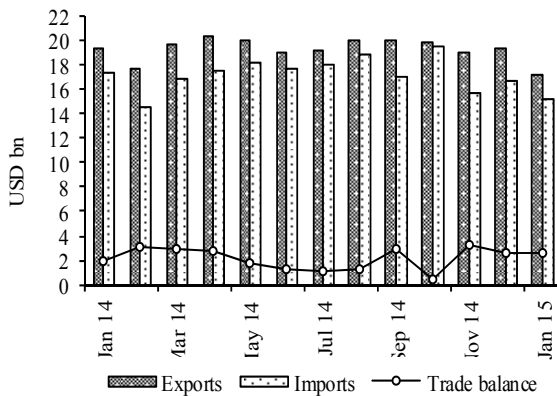
Source: Japanese Trade and Investment Statistics

Goods Exports: US, Euro Zone & Japan
December 2013–December 2014



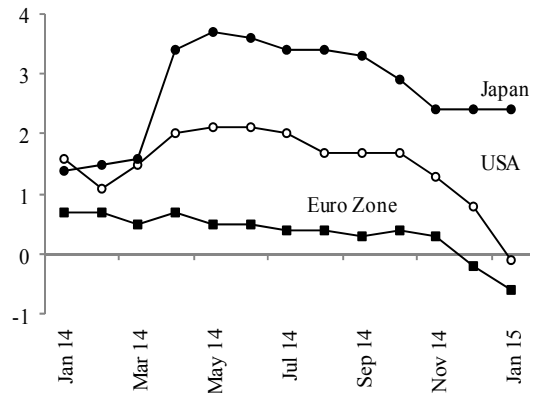
Sources: BEA, Eurostat and OECD

External Trade: Malaysia
January 2014–January 2015



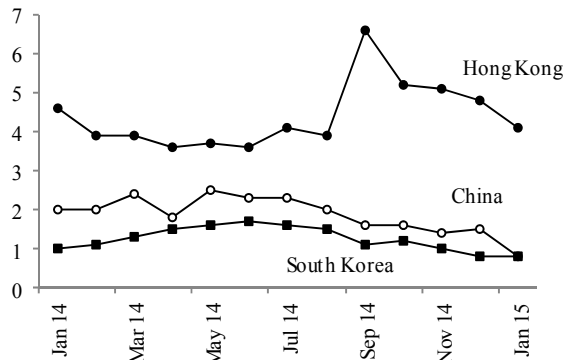
Source: Ministry of International Trade and Industry, Malaysia

Inflation Rates: US, Euro Zone & Japan
(percent price change from a year earlier)
January 2014–January 2015



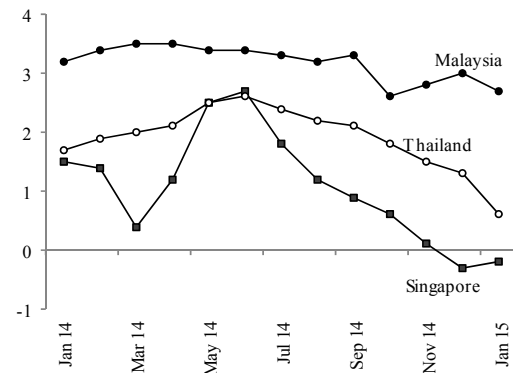
Sources: IMF and Economist (27 Feb 2015)

Inflation Rates: China, Hong Kong & South Korea
(percent price change from a year earlier)
January 2014–January 2015



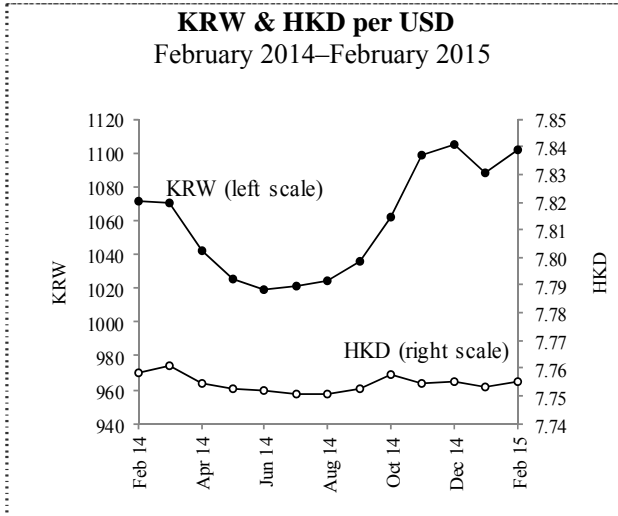
Sources: IMF and Economist (27 Feb 2015)

Inflation Rates: Selected ASEAN Countries
(percent price change from a year earlier)
January 2014–January 2015

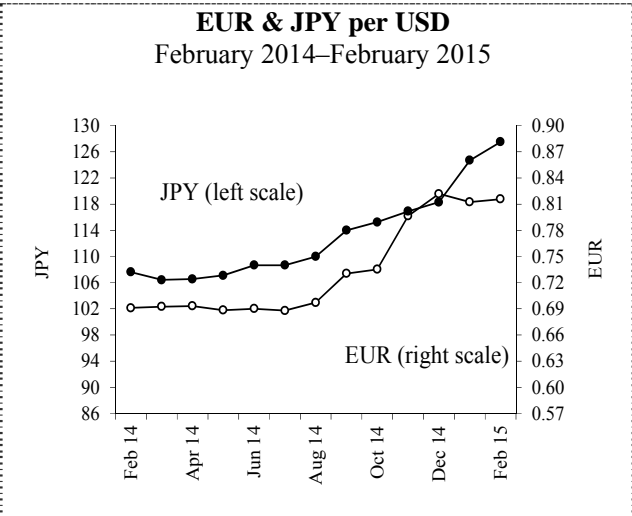


Sources: IMF and Economist (27 Feb 2015)

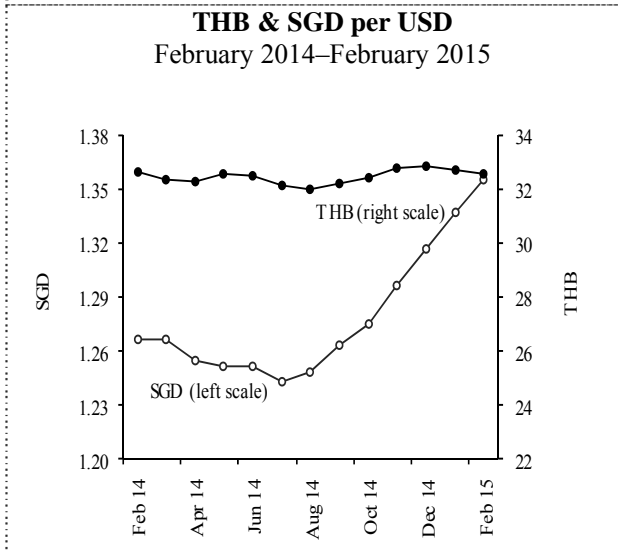
អត្រាប្តូរប្រាក់ និង ស្ថានភាពផ្ទៃដីនិព្វានលើទីផ្សារអន្តរជាតិ
Exchange Rates and Commodity Prices in World Markets



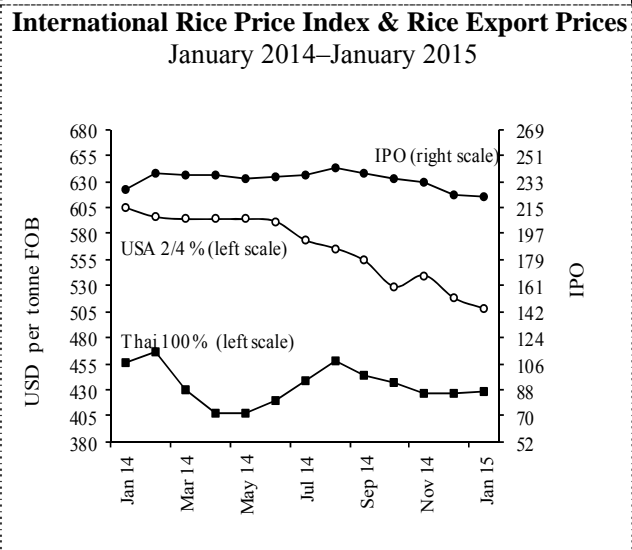
Source: Federal Reserve Bank of New York



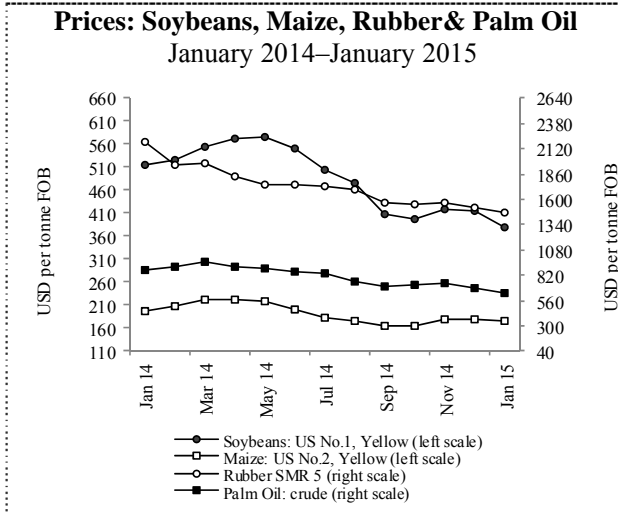
Source: Federal Reserve Bank of New York



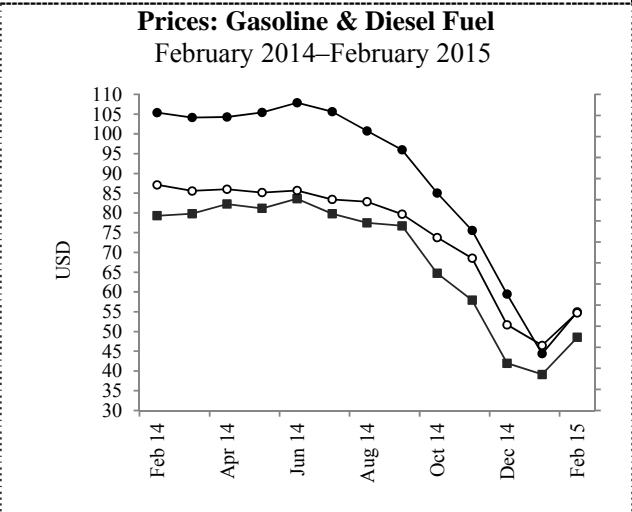
Source: Federal Reserve Bank of New York



Sources: FAO



Source: Food and Agriculture Organisation



Source: US Energy Information Administration

ព័ត៌មានសេដ្ឋកិច្ច
Economic News

ព័ត៌មានសេដ្ឋកិច្ចសំខាន់ៗ

អ្នកផ្តល់កម្ចីមីក្រូហិរញ្ញវត្ថុនៅកម្ពុជា បង្កើនការផ្តល់កម្ចី ១៣% នៅត្រីមាស ទី១ ឆ្នាំ២០១៥

ទិន្នន័យចេញផ្សាយដោយ សមាគមមីក្រូហិរញ្ញវត្ថុកម្ពុជា កាលពី ថ្ងៃព្រហស្បតិ៍ ទី៣០ មេសា បង្ហាញឲ្យដឹងថា ៤០ គ្រឹះស្ថានមីក្រូហិរញ្ញវត្ថុ នៅកម្ពុជា បានរាយការណ៍ពីកំណើន ១៣% នៃការផ្តល់កម្ចីនៅក្នុង ត្រីមាសទី១ ឆ្នាំ២០១៥។

ទិន្នន័យនោះ បានបង្ហាញទៀតថា នៅត្រីមខែមីនា ឆ្នាំ២០១៥ គ្រឹះស្ថានមីក្រូហិរញ្ញវត្ថុ បានផ្តល់កម្ចីប្រហែល ២,២៩ពាន់លានដុល្លារ ឲ្យអតិថិជនប្រហែល ១,៧៨លាននាក់ ឬកើន ១៣% បើធៀបនឹងកាលពី ចុងឆ្នាំ២០១៤ ដែលមានត្រឹម ២,០៣ពាន់លានដុល្លារ។ ដំណាលគ្នា នេះដែរ ប្រាក់បញ្ញើរបស់អតិថិជននៅគ្រឹះស្ថានមីក្រូហិរញ្ញវត្ថុ កើន ១២% ដល់ ១ពាន់លានដុល្លារ ចាប់ពីខែមករា ដល់ មីនា ២០១៥ ដោយមាន អតិថិជន ១,៧៧លាននាក់ បានដាក់ប្រាក់បញ្ញើនៅគ្រឹះស្ថាន មីក្រូហិរញ្ញវត្ថុ។ លោក ប៊ុន មន្នី ប្រធានសមាគមមីក្រូហិរញ្ញវត្ថុកម្ពុជា លើកឡើងថា “កំណើននេះ ពិតជាឆ្លុះបញ្ចាំងពី ទំនុកចិត្តរបស់អតិថិជន ទៅលើអ្នកផ្តល់កម្ចីមីក្រូហិរញ្ញវត្ថុ និងស្ថានភាពសេដ្ឋកិច្ចប្រសើរជាងមុន”។

កម្ពុជាមើលឃើញថា គ្រឹះស្ថានមីក្រូហិរញ្ញវត្ថុជាតួអង្គដ៏សំខាន់មួយ ក្នុងការជួយរដ្ឋាភិបាលកម្ពុជាកាត់បន្ថយភាពក្រីក្រនៅតំបន់ជនបទ ហើយ វិស័យមីក្រូហិរញ្ញវត្ថុបានលូតលាស់យ៉ាងល្អនៅទសវត្សរ៍ចុងក្រោយនេះ។

Economic News Highlights

Cambodia’s microfinance lenders see 13 percent rise in quarter 1 lending

PHNOM PENH, April 30 (Xinhua) -- Cambodia's 40 microfinance institutions (MFIs) reported a 13 percent rise in loan disbursements in the first quarter of 2015, said a consolidated data release by the Cambodian Microfinance Association (CMA) on Thursday.

The MFIs had lent about 2.29 billion US dollars to customers as of March this year, up 13 percent from 2.03 billion US dollars at the end of last year, the release said, adding that around 1.78 million customers had borrowed money from the MFIs.

Meanwhile, customers' deposits at MFIs increased 12 percent to 1 billion US dollars from January to March this year, and 1.77 million people had deposited money in MFIs. “The growth truly reflects customers’ confidence in the microfinance lenders and better economic situation”, said CMA president Bun Mony.

Cambodia sees MFIs as a key player in helping the government reduce poverty in rural areas, and the sector has been well developed in the last decade. (Xinhua, 5 May 2015)

Links to others economic news

1. “Cambodia, other countries to benefit from China-proposed “Belt and Road” initiatives: PM” (http://news.xinhuanet.com/english/2015-05/04/c_134209185.htm)
2. “Interview: AIIB to provide new infrastructure funding avenue, promote China-ASEAN connectivity: Malaysian economist” (http://news.xinhuanet.com/english/2015-04/25/c_134183532.htm)
3. “Backgrounder: ASEAN Community’s building process” (http://news.xinhuanet.com/english/2015-04/27/c_134187840.htm)