



ក្រសួងការបរទេស  
និងសហប្រតិបត្តិការអន្តរជាតិ  
Ministry of Foreign Affairs  
and International Cooperation

# ផ្ទាំងព័ត៌មាន DASHBOARD

រៀបចំ និងចងក្រងដោយ៖  
ក្រុមការងារសម្របសម្រួលការទូតសេដ្ឋកិច្ច

Prepared by:  
Economic Diplomacy Coordinating Group

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**CONTACT:**

[economic.diplomacy@mfaic.gov.kh](mailto:economic.diplomacy@mfaic.gov.kh)

លេខ ៣ វិថី សម្តេច ហ៊ុន សែន សង្កាត់ទន្លេបាសាក់  
ខណ្ឌចំការមន រាជធានីភ្នំពេញ ព្រះរាជាណាចក្រកម្ពុជា  
No 3, Samdech HUN Sen Street, Sangkat Tonle Bassac,  
Khan Chamkamon Phnom Penh, Kingdom of Cambodia

សូម SCAN  
ដើម្បីទាញ  
យកឯកសារ



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A

# ABOUT CAMBODIA

# About Cambodia

Final Census Results 3-13 March 2019

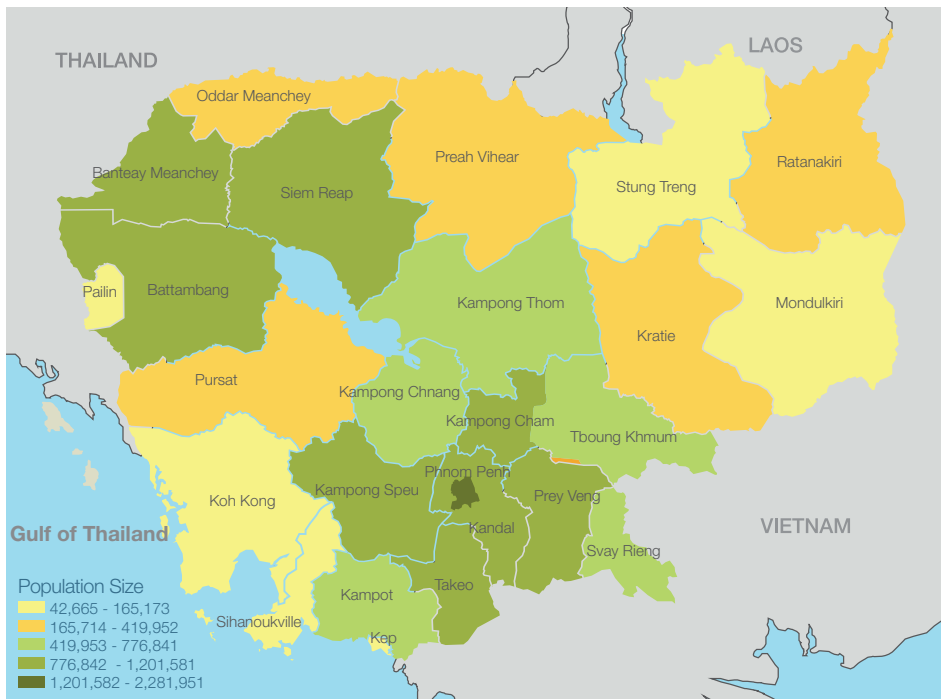
• Living in Cambodia • Demographic



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## Living in Cambodia



## Demographic (2019)

Annual Population

**15.55** Million

**7.98** Million (51.3%)  
**7.57** Million (48.7%)

Growth Rate **1.4%**

Median Age **27**

Life Expectancy

**76.8** | **74.3**

Labour Force

**8.7** Million

**98.6%** Employed | **1.4%** Unemployed

\*These figures exclude **1.23 million** migrants working abroad:

- Thailand 1.14m
- ROK 49.0k
- Malaysia 30.1k
- Japan 9.1k
- Saudi Arabia 16
- Singapore 831
- Hong Kong 45

\* Source: Report of Annual General Meeting 2018, Ministry of Labour & Vocational Training.



**24** Provinces

Capital City  
**PHNOM PENH**

**2** Seasons

**Rainy Season** May-October | **Dry Season** November-April

Local Currency



**Riel (KHR)**

**Religion**  
97% - Buddhism  
3% - Others

**Language**  
**Khmer**

**GDP**  
per capita

2019  
**\$1,700**

2020  
**\$1,683**  
(est.)

2021  
**\$1,771**  
(pre.)

1993 2015 2030 2050

Low  
Income  
Country

Lower  
Middle  
Income  
Country

Upper  
Middle  
Income  
Country

World Bank 2018:  
Fastest growing country in East Asia  
with an average growth rate of 8%  
between 1998 and 2018.

Asian Development Bank 2016:  
Cambodia as Asia's  
New Tiger Economy



**B**

TRADE



## International Trade by Country

(Million USD)

Country	2019			2020			Change		
	Export	Import	Volume	Export	Import	Volume	Export	Import	Volume
USA	4,402.36	311.20	4,713.57	5,258.88	250.73	5,509.60	19.46%	-19.43%	16.89%
Japan	1,136.58	882.34	2,018.92	1,055.55	637.09	1,692.64	-7.13%	-27.80%	-16.16%
China	1,004.79	7,558.52	8,563.31	1,086.26	7,031.81	8,118.07	8.11%	-6.97%	-5.20%
UK	977.50	79.77	1,057.28	826.16	51.38	877.54	-15.48%	-35.60%	-17.00%
Canada	836.68	121.16	957.85	745.04	55.36	800.4	-10.95%	-54.31%	-16.44%
ROK	211.72	670.04	881.76	185.02	544.11	729.13	-12.61%	-18.79%	-17.31%
Australia	133.58	72.21	205.79	133.92	79.72	213.64	0.26%	10.41%	3.82%
India	64.67	191.59	256.26	61.36	128.77	190.13	-5.12%	-32.79%	-25.81%
New Zealand	12.18	9.31	21.50	13.31	15.17	28.48	9.23%	62.86%	32.47%
ASEAN	1,303.41	7,951.50	9,254.90	3,722.76	7,607.26	11,330.02	185.62%	-4.33%	22.42%
↳ Thailand	502.10	3,222.44	3,724.54	650.67	2,835.56	3,486.23	29.59%	-12.01%	-6.40%
↳ Vietnam	335.82	2,718.19	3,054.01	385.79	2,633.81	3,019.60	14.88%	-3.10%	-1.13%
EU	3,894.19	701.09	4,595.28	3,203.87	659.13	3,863.00	-17.73%	-5.98%	-15.94%
EAEU	51.81	5.17	56.98	52.19	15.18	67.37	0.73%	193.57%	18.22%
Others	719.25	1,617.91	2,337.17	871.06	1,514.76	2,385.81	21.11%	-6.38%	2.08%
<b>Total</b>	<b>14,748.74</b>	<b>20,171.81</b>	<b>34,920.55</b>	<b>17,215.37</b>	<b>18,590.48</b>	<b>35,805.85</b>	<b>16.72%</b>	<b>-7.84%</b>	<b>2.54%</b>

## Import

Import	2019	2020	Change
Textiles	5,030.78	4,359.38	-13.35%
Construction Materials	1,088.04	1,008.15	-7.34%
Steel	556.85	403.63	-27.52%
Cement	128.86	66.25	-48.59%
Mineral Water & Carbonated Water	303.28	309.15	1.94%
Beer, Wine & Spirits	35.61	17.89	-49.78%
Vehicle	1,734.31	1,099.56	-36.60%
Pharmaceutical Products	394.51	393.50	-0.26%
Fertilizer & Pesticide	323.54	327.57	1.25%
Electronic & Electrical Equipment	2,476.59	2,384.49	-3.72%
Others	8,099.45	8,220.90	1.50%
<b>Total</b>	<b>20,171.81</b>	<b>18,590.48</b>	<b>-7.84%</b>

## Export

Export	2019	2020	Change
Clothing	8,266.35	7,420.28	-10.24%
Footwear	1,264.62	1,116.73	-11.69%
Travel Accessories	1,078.89	964.70	-10.58%
Machinery & Electrical Equipment	574.44	755.34	31.49%
Bike	412.49	527.08	27.78%
Rice	420.13	468.58	11.53%
Furniture & Lighting Equipment	419.48	631.88	50.63%
Unvulcanized Rubber	223.90	280.34	25.21%
Cane Sugar	54.40	46.04	-15.36%
Fruits & Vegetables	66.23	134.63	103.27%
Others	1,967.80	4,869.76	147.47%
<b>Total</b>	<b>14,748.74</b>	<b>17,215.37</b>	<b>16.72%</b>

# Trade Trends 2019

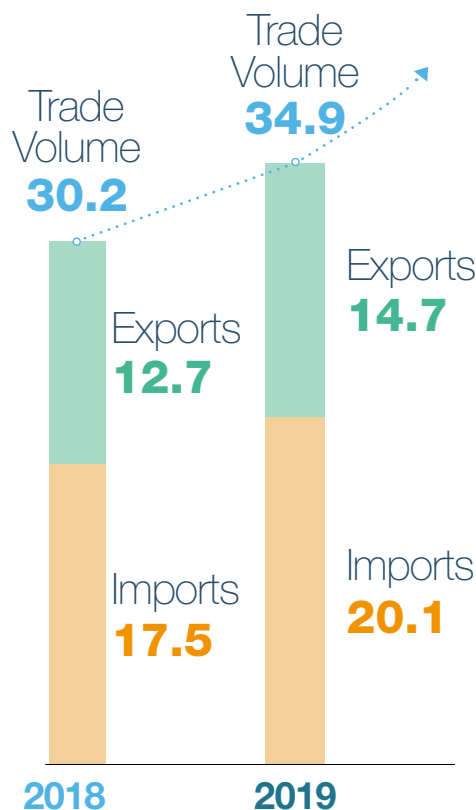


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## Trade Volume

(Value in Billion USD)



## Top Export by Product

(Volume in Thousand Tonnes ; Value in Million USD)

Product	2018		2019		Change (%)	
	Volume	Value	Volume	Value	Volume	Value
Clothes	571.8	7,802.2	574.0	8,258.9	+0.4%	+5.9%
Shoes	87.2	1,036.6	99.9	1,263.4	+14.6%	+21.9%
Textiles	105.9	731.9	129.2	1,312.5	+22.0%	+79.3%
Total of Garment	765.0	9,570.6	803.1	10,834.7	+5.0%	+13.2%
Bicycle*	1,802.7	374.5	1,892.4	411.9	+5.0%	+10.0%
Electronic**	37.4	560.9	72.7	722.2	+94.4%	+28.8%
Plastic Articles	93.8	183.5	113.5	226.8	+21.0%	+23.6%
Motor Vehicle Spare Parts	3.5	58.2	4.7	85.4	+34.3%	+46.7%
Wood ***	165.6	138.9	156.8	147.1	-5.3%	+5.9%
Sand	762.0	11.1	276.0	2.9	-63.8%	-73.9%
Rice	571.8	417.0	555.4	419.2	-2.9%	+0.5%
Paddy	1,571.5	265.5	1,319.5	261.8	-16.0%	-1.4%
Rubber	164.9	217.4	164.4	219.2	-0.3%	+0.8%
Other Agriculture	N/A	N/A	3,159.5	490.0	N/A	N/A

\* (Thousand Unit)

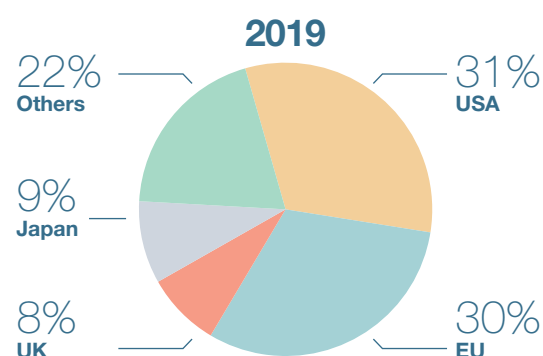
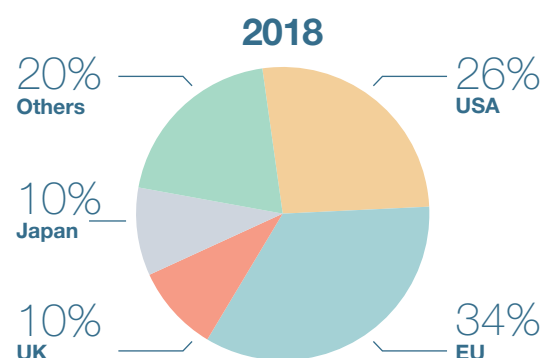
\*\* (including electrical harness and decorative lighting)

\*\*\* (Thousand M<sup>3</sup>)

## Export of Garment by Countries

(Volume in Thousand Tonnes ; Value in Million USD)

Country		2018	2019	Change (%)
USA	Volume	206.9	284.2	+37.4%
	Value	2,532.8	3,462.4	+36.7%
EU	Volume	257.6	245.6	-4.7%
	Value	3,287.4	3,361.2	+2.2%
UK	Volume	68.0	62.2	-8.5%
	Value	915.6	893.7	-2.4%
Japan	Volume	60.7	62.8	+3.5%
	Value	928.7	986.5	+6.2%
Others	Volume	171.7	148.3	-13.6%
	Value	1,906.1	2,130.9	+11.8%
Total	Volume	764.9	803.1	+5.0%
	Value	9,570.6	10,834.7	+13.2%







## Trade Statistic Sort by Import (Top 10 Countries)

(Value in Million USD)

Country	Imports			Exports			Balance	
	2018	2019	Change	2018	2019	Change	2018	2019
China	6,120.1	7,550.4	+23.4%	855.3	1,004.1	+17.4%	-5,264.8 ↓	-6,546.3 ↓
Thailand	3,127.7	3,217.5	+2.9%	305.1	502.3	+64.6%	-2,822.6 ↓	-2,715.2 ↓
Vietnam	2,212.6	2,715.9	+22.7%	324.4	335.7	+3.5%	-1,888.2 ↓	-2,380.2 ↓
Japan	734.8	881.3	+19.9%	1,074.0	1,135.0	+5.7%	339.2 ↑	253.7 ↑
Chinese Taipei	774.9	797.6	+2.9%	47.1	60.7	+28.9%	-727.8 ↓	-736.9 ↓
Indonesia	521.5	768.7	+47.4%	18.6	22.3	+19.9%	-502.9 ↓	-746.4 ↓
EU	655.5	700.2	+6.8%	3,821.0	3,890.4	+1.8%	3,165.5 ↑	3,190.2 ↑
ROK	563.4	669.3	+18.8%	199.1	211.3	+6.1%	-364.3 ↓	-458.0 ↓
Singapore	564.9	601.3	+6.4%	77.2	272.9	+253.5%	-487.7 ↓	-328.4 ↓
Malaysia	356.6	582.3	+63.3%	127.7	115.1	-9.9%	-228.9 ↓	-467.2 ↓
Others	1,623.8	1,663.0	+2.4%	5,776.4	7,189.1	+24.5%	4,152.6 ↑	5,526.1 ↑
<b>Total</b>	<b>17,255.8</b>	<b>20,147.5</b>	<b>+16.8%</b>	<b>12,625.9</b>	<b>14,738.9</b>	<b>+16.7%</b>	<b>-4,629.9 ↓</b>	<b>-5,408.6 ↓</b>

## Trade Statistic Sort by Export (Top 10 Countries)

(Value in Million USD)

Country	Export			Import			Balance	
	2018	2019	Change	2018	2019	Change	2018	2019
USA	3,041.5	4,401.3	+44.7%	265.2	310.9	+17.2%	2,776.3 ↑	4,090.4 ↑
EU	3,821.0	3,890.4	+1.8%	655.5	700.2	+6.8%	3,165.5 ↑	3,190.2 ↑
Japan	1,074.0	1,135.0	+5.7%	734.8	881.3	+19.9%	339.2 ↑	253.7 ↑
China	855.3	1,004.1	+17.4%	6,120.1	7,550.4	+23.4%	-5,264.8 ↓	-6,546.3 ↓
UK	1,015.2	976.7	-3.8%	58.6	79.7	+36.0%	956.6 ↑	897.0 ↑
Canada	775.8	835.7	+7.7%	98.1	121.1	+23.4%	677.7 ↑	714.6 ↑
Thailand	305.1	502.3	+64.6%	3,127.7	3,217.5	+2.9%	-2,822.6 ↓	-2,715.2 ↓
Viet Nam	324.4	335.7	+3.5%	2,212.6	2,715.9	+22.7%	-1,888.2 ↓	-2,380.2 ↓
Singapore	77.2	272.9	+253.5%	564.9	601.3	+6.4%	-487.7 ↓	-328.4 ↓
Hong Kong SAR	305.3	238.6	-21.8%	593.6	539.3	-9.1%	-288.3 ↓	-300.7 ↓
Others	1,031.1	1,146.2	+11.2%	2,824.7	3,429.9	+21.4%	-1,793.6 ↓	-2,283.7 ↓
<b>Total</b>	<b>12,625.9</b>	<b>14,738.9</b>	<b>+16.7%</b>	<b>17,255.8</b>	<b>20,147.5</b>	<b>+16.8%</b>	<b>-4,629.9 ↓</b>	<b>-5,408.6 ↓</b>



C

INVESTMENT

# Investment Trends 2020

- Investment Trends by Country • Investment Trends by Sector
- Cambodia: A Prospective Investment Destination • Rectangular Strategy Phase IV
- Investment Application Procedures



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## Investment Trends by Country

Country	2018	2019	2020
<b>ASEAN</b>	<b>2,133.09</b>	<b>4,756.99</b>	<b>4,384.53</b>
Brunei	2.53	-	-
Cambodia	2,009.60	4,646.16	4,147.45
Indonesia	-	-	-
Malaysia	43.59	4.54	98.54
Philippines	8.14	-	-
Singapore	17.76	30.07	73.01
Thailand	51.47	73.30	57.30
Vietnam	-	2.92	8.23
<b>Other Asia</b>	<b>4,191.82</b>	<b>4,040.26</b>	<b>1,962.28</b>
China	3,179.45	2,746.13	1,393.93
<i>Hong Kong</i>	81.49	912.55	143.83
<i>Taipei</i>	33.39	57.66	109.61
<i>Macau</i>	-	-	5.63
Japan	882.94	298.84	46.47
ROK	14.55	25.08	262.81
India	-	-	-
Pakistan	-	-	-
<b>Middle East</b>	<b>-</b>	<b>-</b>	<b>-</b>
UAE	-	-	-
<b>America</b>	<b>58.09</b>	<b>560.20</b>	<b>1,795.90</b>
Canada	1.96	6.12	-
U.S.A	6.82	7.25	33.48
Cayman Islands	-	-	1,722.42
Argentina	-	-	2.52
British V. Island	49.31	546.83	37.48
<b>Pacific Islands</b>	<b>43.03</b>	<b>-</b>	<b>-</b>
Samoa	43.03	-	-
Marshall Island	-	-	-
<b>Europe</b>	<b>23.09</b>	<b>40.13</b>	<b>107.26</b>
U.K	14.71	26.31	105.24
Netherlands	2.31	7.28	-
France	6.07	6.54	-
Sweden	-	-	-
Italy	-	-	2.02
<b>Oceania</b>	<b>2.40</b>	<b>-</b>	<b>0.83</b>
Australia	2.40	-	-
New Zealand	-	-	0.83
<b>Africa</b>	<b>-</b>	<b>-</b>	<b>-</b>
Maurice	-	-	-
Seychelles	-	-	-
<b>Total</b>	<b>6,451.52</b>	<b>9,397.58</b>	<b>8,250.80</b>
Δ%	2%	46%	-12%

Million USD

## Investment Trends by Sector

Sector	Total	2016	2017	2018	2019	2020
<b>Tourism</b>	<b>12,125.23</b>	<b>1,398.23</b>	<b>3,166.56</b>	<b>1,508.81</b>	<b>6,051.62</b>	<b>3,850.51</b>
Tourism	2,795.69	521.89	2,218.80	-	55.00	3,586.83
Hotel	4,326.28	324.70	710.56	692.02	2,598.99	263.68
Tourism Centre	5,003.27	551.64	237.20	816.79	3,397.64	0
<b>Energy</b>	<b>1,992.7</b>	<b>12.50</b>	<b>-</b>	<b>58.23</b>	<b>158.60</b>	<b>1,763.37</b>
Energy	1,763.05	-	-	-	71.26	1691.79
Solar	209.02	12.50	-	58.23	87.34	50.95
Photovoltaic	20.62	-	-	-	-	20.62
<b>Industry</b>	<b>6,497.49</b>	<b>1,347.47</b>	<b>1,814.52</b>	<b>1,256.04</b>	<b>2,079.46</b>	<b>1,692.56</b>
Garment	1,037.77	169.84	213.73	203.39	219.70	231.12
Food Processing	307.20	14.09	3.07	49.62	47.28	193.14
Bag	509.04	24.99	95.23	50.83	265.51	72.48
Shoes	299.01	73.36	55.00	40.97	62.39	67.31
Battery & Accessories	46.58	-	-	-	-	46.58
Garment Accessories	76.94	3.90	2.38	19.26	6.06	45.34
Building Materials	338.09	20.02	156.03	60.45	56.95	44.65
Others	3,882.86	1,041.27	1,289.08	831.52	1,421.57	991.94
Health Care	75.85	53.35	9.20	6.30	7.00	478.14
Service	5,683.09	444.09	1,045.31	3,172.41	1,021.28	321.66
Agriculture	1,179.31	354.01	295.54	449.75	80.01	144.56
<b>Total</b>	<b>25,790.30</b>	<b>3,609.65</b>	<b>6,331.14</b>	<b>6,451.54</b>	<b>9,397.98</b>	<b>8,250.80</b>

## Cambodia: A Prospective Investment Destination

- One of the most open economies in Southeast Asia and located in the centre of a dynamic region
- Political and macroeconomic stability
- Competitive and young labor force & natural endowment
- Pro-Business Government

## Rectangular Strategy Phase IV



## Investment Application Procedures

### Application Process of QIP outside of SEZ:

- Submission of an Investment Proposal to the CDC or PMIS
- Issuance of "Conditional Registration Certificate" (CRC)
- Issuance of "Letter of Non Compliance"
- Obtaining all of the licenses from relevant ministries-entities listed in the CRC on behalf of the Applicant
- Issuance of a "Final Registration Certificate" (FRC)

### Registration Process of QIP of Investment Project in the SEZ

- Complete the formalities and submit to the office of the SEZ Administration
- The SEZ Administration to decide based on the legal, administrative and technical aspects and on the issuance of the FRC.

# Investment Incentives

• Geographical Benefits • Pro-Business Approach • Investment Incentives

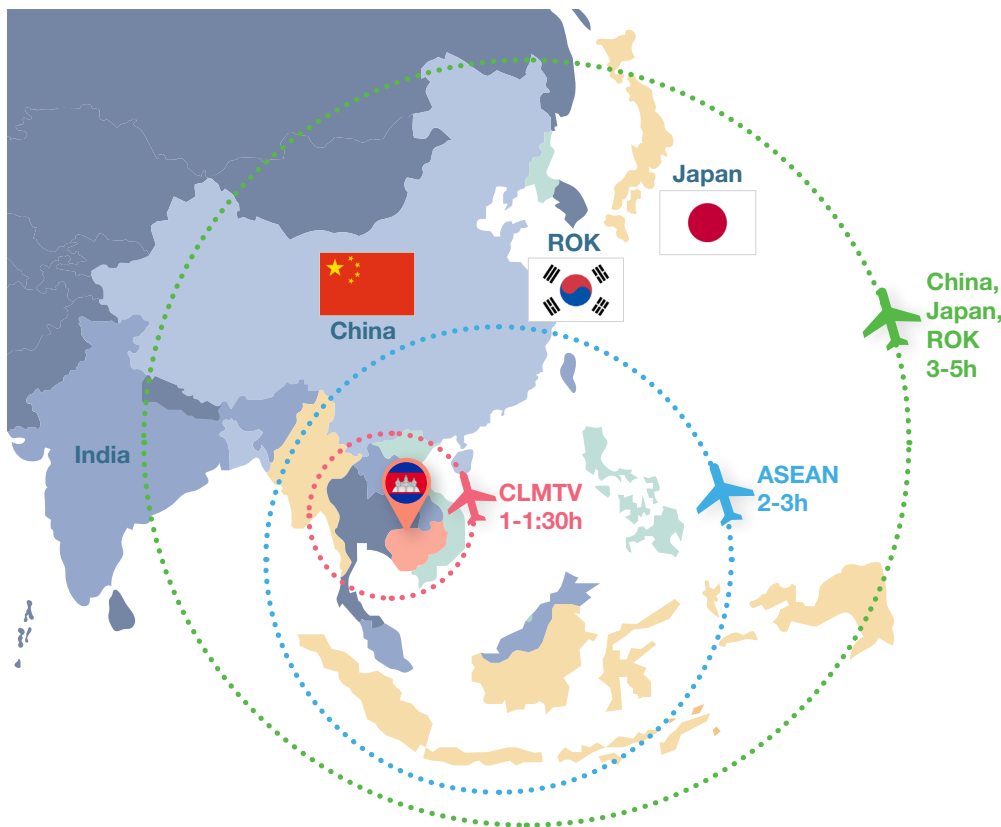


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## Geographical Advantages

One of the most open economies in SE Asia & central location in a dynamic region



### ASEAN+6 (RCEP)

Total Population

**3.58** Billion

GDP USD 27.3 Trillion  
32.2% of World Economy  
29.2% of World Trade



Total Population

**649.1**  
Million

**ASEAN (2018)**  
GDP USD 2.98 Trillion  
Economic Growth 5.11%  
Total Investment USD 154.7 Billion



Total Population

**239**  
Million



**CLMTV (2018)**  
GDP USD 866 Billion  
Economic Growth 6.36%  
Total Investment USD 36.7 Billion

## Pro-Business Approach

### 1 Open Economy

- Fair & equitable treatment
- Non-discrimination
- No local equity requirement
- Free transfer

### 2 One-Stop Service

- Streamlining procedures
- Enhanced public service (e-platform)
- Incentives & support
- Aftercare services

### 3 Investment Guarantee

- No nationalisation
- No local content requirement
- No restriction on FOREX
- No capital and price control

## Investment Incentives

Tax Holiday  
or Special  
Depreciation

Corporate  
Income Tax  
20%

Import Duty  
Exemption

**Tax holiday = Trigger Period + 3 + n (Priority Period)**

(Article 7, Financial Management Law 2006 & 2009)

- » n= 1 (Industry<20M, Tourism<20M, Infrastructure<10M)
- » n=2 (Industry<50M, Infrastructure<30M)
- » n=3 (Industry>50M, Agriculture QIP, Infrastructure>30M) or Special Depreciation

**For investment in agriculture sector:**

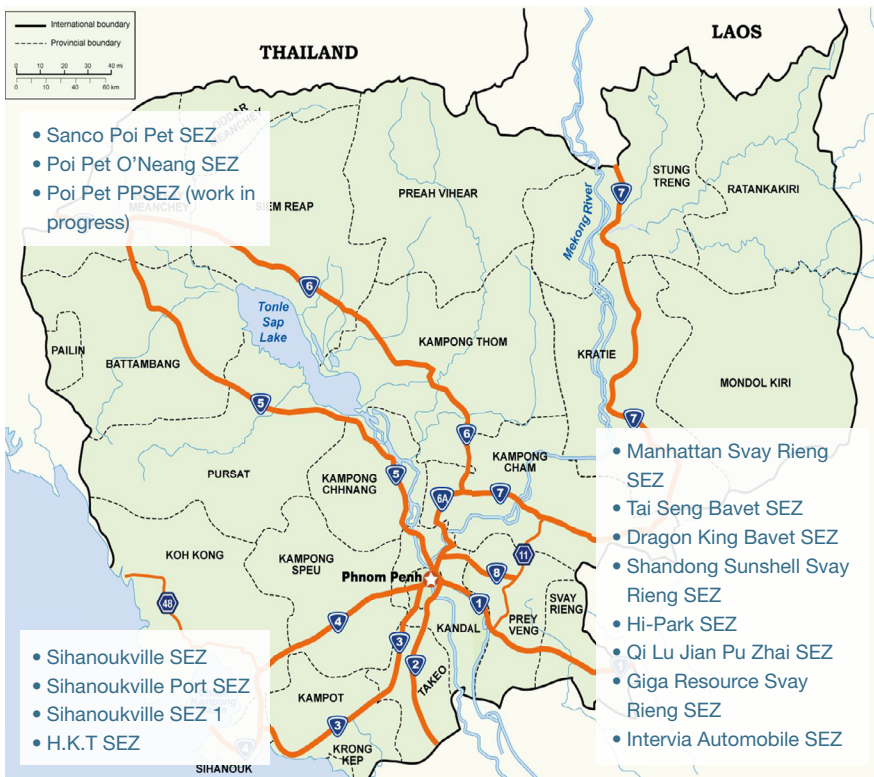
- Custom duty 0% for agriculture inputs and machineries
- One Stop Service for rice export, exemption of VAT for inputs using paddy rice
- Exemption of VAT for fertilizer, seeds, pesticides, animal feed, animal breeds, and agricultural machineries (prakas #312 MEF dated March 19, 2014)

# Cambodia SEZs

- Cambodia SEZs • Opportunities in the provinces along Thai border
- Encourage Investment Activities



## Cambodia SEZs



**54**  
SEZs  
Approved

**33**  
SEZs  
by Sub-decree

**26**  
SEZs  
are operational

**18**  
SEZs  
have Special  
Admin Office

**21**  
SEZs  
are seeking  
funds

**6**  
SEZs  
are under  
construction

**Suspension of VAT on Duty Free Import**  
(Letter No. 3841 MEF dated July 2<sup>nd</sup> 2019  
and letter No.3725 MEF)

[www.cambodiainvestment.gov.kh](http://www.cambodiainvestment.gov.kh)

## Opportunities in the provinces along Thai border

Province	Population	Land size m <sup>2</sup>
Koh Kong	123,618	10,090
Banteay Meanchey	859,545	6,679
Oddor Meanchey	261,252	6,158
Preah Vihear	251,352	13,788
Pailin	71,600	803
Pursat	411,759	12,692
Battambang	987,400	11,702

**Population**  
2,966,526 people (M: 49%, F: 51%)  
Young : 44% (age 15 – 35)

**General Education**  
72 Secondary Schools  
34 High Schools

**Higher Education**  
5 Universities with 4,142 students  
5 TVET with 466 students

SEZ along Cambodia-Thai Border	Status	Investment (USD Million)
Sanco Poi Pet SEZ (Toyota Tsusho's Techo Park)	10 proj	47.75
Poi Pet O'Neang SEZ	6 proj	14.60
Poi Pet SEZ	1 proj	22.36
Neangkok Koh Kong SEZ	7 proj	74.65
Kiri Sakor Koh Kong SEZ	1 proj	40.00
Chhak Kampong Som SEZ	IP	0
Suoy Cheng SEZ	IP	0
CESIZ SEZ	IP	0
Ly Ut Ny Poi Pet SEZ	IP	0
Peayorp Poipet SEZ	IP	0
Oddor Meanchey SEZ	IP	0

Management	762
IT	50
Banking	661
Marketing	185
Accounting	150
English	235
Law	273
Computer Service	35
Water System Installation	30
Electrical	89
Civil Engineering	4
Auto Repair	7
Aircon Repair	16
Other	

## Encouraged Investment Activities

- R&D, Science, Technology and Innovation
- High technology including Biotechnology, pharmaceutical
- Machinery and Medium technology to create value for the economy
- Manufacturing of chemical, electrical and Electronic products
- Agriculture, food processing and its value chain
- Electronic assembly
- Natural resources processing
- High value added garment products
- Industrial Equipment assembly
- Tourism sector
- HRD
- ICT
- Energy Development and SMEs Supporting Industries
- Light manufacturing
- Construction materials
- Food and beverage
- Packaging equipment for export
- Transport and logistic

# Foreign Direct Investment

Data as of Q4 2019 • All value is in USD Million



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## Investment by Country (Stock)

Country	2016	2017	2018	2019	Share %
China	7,260.2	7,894.5	8,618.3	9,731.4	28.6%
R.O.K	3,041.8	3,216.7	3,546.0	3,790.6	11.14%
Hong Kong	1,792.1	2,175.3	2,568.5	2,967.8	8.72%
Viet Nam	1,904.7	1,912.8	2,186.1	2,368.0	6.96%
Singapore	1,264.1	1,432.6	1,759.3	2,031.5	5.97%
Japan	1,303.9	1,527.8	1,842.9	2,022.9	5.94%
Chinese Taipei	1,415.0	1,594.3	1,750.7	1,965.1	5.77%
Malaysia	1,223.1	1,377.2	1,524.0	1,678.4	4.93%
Thailand	1,114.1	1,323.4	1,500.3	1,578.4	4.64%
U.K	501.2	617.1	726.1	896.2	2.63%
Others	3,555.36	3,975.88	4,346.70	4,999.11	14.69%
<b>Total</b>	<b>24,375.62</b>	<b>27,047.65</b>	<b>30,368.96</b>	<b>34,029.37</b>	<b>100%</b>

## Investment by Sectors (Stock)

Industry	2016	2017	2018	2019	Share %
<b>1 Agriculture</b>	<b>3,224.69</b>	<b>3,458.51</b>	<b>3,689.30</b>	<b>3,901.84</b>	<b>11.47%</b>
<b>2 Mining &amp; quarrying</b>	<b>234.25</b>	<b>253.31</b>	<b>272.88</b>	<b>289.73</b>	<b>0.85%</b>
<b>3 Total Manufacturing</b>	<b>5,837.17</b>	<b>6,193.50</b>	<b>6,614.93</b>	<b>7,247.57</b>	<b>21.30%</b>
Beverage	285.86	341.84	399.25	447.33	1.31%
Footwear	730.43	792.45	849.64	916.33	2.69%
Garment	4,181.39	4,412.08	4,697.11	5,015.27	14.74%
Bag	38.28	38.28	38.28	204.94	0.60%
Packaging	238.83	238.83	250.33	278.83	0.82%
Petroleum	94.46	94.46	97.12	98.45	0.29%
Tobacco	83.71	91.35	98.99	102.21	0.30%
Wood Pro.	184.20	184.20	184.20	184.20	0.54%
<b>4 Financial Activities</b>	<b>3,547.07</b>	<b>4,382.36</b>	<b>5,548.26</b>	<b>6,726.48</b>	<b>19.77%</b>
<b>5 Accomodation</b>	<b>2,532.84</b>	<b>2,851.18</b>	<b>3,295.68</b>	<b>3,809.16</b>	<b>11.19%</b>
Hotel	741.89	877.98	1,018.88	1,199.85	3.53%
Resort	466.22	544.47	614.07	750.59	2.21%
Casino	1,324.73	1,428.73	1,662.73	1,858.73	5.46%
<b>6 Telecom</b>	<b>620.32</b>	<b>640.92</b>	<b>661.52</b>	<b>682.12</b>	<b>2.00%</b>
<b>7 Construction</b>	<b>455.31</b>	<b>562.70</b>	<b>804.43</b>	<b>1,054.26</b>	<b>3.10%</b>
<b>8 Hydropower</b>	<b>2,298.14</b>	<b>2,312.83</b>	<b>2,327.51</b>	<b>2,342.19</b>	<b>6.88%</b>
<b>9 Real Estate</b>	<b>3,112.88</b>	<b>3,480.68</b>	<b>3,844.80</b>	<b>4,283.52</b>	<b>12.59%</b>
<b>10 Other</b>	<b>2,513.90</b>	<b>2,912.60</b>	<b>3,310.61</b>	<b>3,693.44</b>	<b>10.85%</b>
<b>Total</b>	<b>24,376.56</b>	<b>27,048.59</b>	<b>30,369.90</b>	<b>34,030.31</b>	<b>100%</b>

# Foreign Direct Investment

Data as of Q4 2019 • All value is in USD Million



Kingdom of Cambodia  
Ministry of Foreign Affairs  
and International Cooperation

Economic Diplomacy  
Coordinating Group

## Investment by Country (Flow)

Country	2016	2017	2018	2019	Share %
China	603.8	634.8	798.2	1,112.4	30.02%
R.O.K	138.4	177.2	249.9	248.0	6.69%
Hong Kong	248.2	347.3	349.0	399.3	10.77%
Viet Nam	192.2	127.2	165.9	184.9	4.99%
Singapore	175.0	178.1	227.7	263.4	7.11%
Japan	255.4	226.6	199.2	179.3	4.84%
Chinese Taipei	104.7	168.7	121.6	214.2	5.78%
Malaysia	98.9	145.0	157.8	160.6	4.33%
Thailand	151.1	146.4	183.2	88.7	2.39%
U.K	125.3	115.9	109.0	171.0	4.62%
Others	382.9	520.9	651.0	684.2	18.46%
<b>Total</b>	<b>2,476</b>	<b>2,788</b>	<b>3,212.63</b>	<b>3,706.03</b>	<b>100%</b>

## Investment by Sectors (Flow)

Industry	2016	2017	2018	2019	Share %
<b>1 Agriculture</b>	<b>236.64</b>	<b>233.82</b>	<b>230.80</b>	<b>212.54</b>	<b>5.73%</b>
<b>2 Mining &amp; quarrying</b>	<b>22.47</b>	<b>19.06</b>	<b>19.56</b>	<b>16.85</b>	<b>0.45%</b>
<b>3 Total Manufacturing</b>	<b>490.24</b>	<b>356.33</b>	<b>421.43</b>	<b>632.65</b>	<b>17.07%</b>
Beverage	48.31	55.98	57.41	48.08	1.30%
Footwear	100.47	62.02	57.19	66.69	1.80%
Garment	251.69	230.69	285.03	318.16	8.58%
Bag	13.20	-	-	166.66	4.50%
Packaging	6.08	-	11.49	28.51	0.77%
Petroleum	0.76	-	2.66	1.33	0.04%
Tobacco	12.27	7.64	7.64	3.21	0.09%
Wood Pro.	57.47	-	-	-	0.00%
<b>4 Financial Activities</b>	<b>645.54</b>	<b>951.35</b>	<b>1,057.21</b>	<b>1,223.85</b>	<b>33.02%</b>
<b>5 Accomodation</b>	<b>253.96</b>	<b>318.33</b>	<b>444.50</b>	<b>513.49</b>	<b>13.86%</b>
Hotel	127.64	136.08	140.90	180.97	4.88%
Resort	43.34	78.25	69.60	136.52	3.68%
Casino	82.99	104.00	234.00	196.00	5.29%
<b>6 Telecom</b>	<b>16.09</b>	<b>20.60</b>	<b>20.60</b>	<b>20.60</b>	<b>0.56%</b>
<b>7 Construction</b>	<b>77.30</b>	<b>107.39</b>	<b>241.73</b>	<b>249.83</b>	<b>6.74%</b>
<b>8 Hydropower</b>	<b>14.68</b>	<b>14.68</b>	<b>14.68</b>	<b>14.68</b>	<b>0.40%</b>
<b>9 Real Estate</b>	<b>313</b>	<b>368</b>	<b>364</b>	<b>438.72</b>	<b>11.84%</b>
<b>10 Other</b>	<b>406.12</b>	<b>398.70</b>	<b>398.01</b>	<b>382.83</b>	<b>10.33%</b>
<b>Total</b>	<b>2,475.92</b>	<b>2,788.08</b>	<b>3,212.63</b>	<b>3,706.03</b>	<b>100%</b>

# INVESTMENT OPPORTUNITY IN CAMBODIA

• Legislation & Laws • Promotion and Competitive Advantages



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## Legislation & Laws

### Domestic Laws & Regulations:

- Law on Investment (1994), Law on the Amendment to the Law on Investment (2003) and Law on Commercial Enterprises (2005)
- Law on Concessions (2007)
- Cambodia Industrial Development Policy (2015-2025)
- Sub-decree No.111 ANK/BK on the Implementation of the Law on the Amendment to the Law on Investment of the Kingdom of Cambodia (2005)
- Sub-decree No.148 ANKR.BK on the Establishment and Management of the Special Economic Zone (2005)
- Joint Prakas No.991 SHV.PRK on Public Services of the Council for the Development of Cambodia (2012)

### International Instruments:

- Regional Comprehensive Economic Partnership (**RCEP**)
- Cambodia-China Free Trade Agreement (**CCFTA**)
- Cambodia-Korea Free Trade Agreement (**CKFTA**)
- ASEAN Comprehensive Investment Agreement (**ACIA**)
- Bilateral Investment Agreements (**28 Agreements**)

### Substantial Commitments:

#### 1. Market Access

- No distinction between foreign & Cambodian investors
- No sectors restricted to foreign investors
- Same investments are entitled to same incentive schemes

#### 2. Guarantee and Protection

- Fair & equitable treatment
- Non-discrimination
- Free transfer of payment
- No expropriation or nationalization
- Most Favored Nation & National Treatment
- Compensation for losses
- Disputes settlement mechanisms

## Promotion and Competitive Advantages

### Open Economy

- Equal treatment (NT & MFN)
- No requirement of local equity participation
- Least restriction on sectors
- No price controls on products or services
- No restriction on foreign currencies conversion

### One-Stop Service

- Information & application
- Fast-track investment approval process (within 28 working days).
- Customs duty & tax exemption
- Visa & work permit

### Competitive Investment Incentives

- Low corporate tax: 20%
- Tax holiday: up to 9 years
- Full import duty exemption (production equipment and machineries, construction material, production inputs)

### Sound Macroeconomic Environment

- 6th fastest growing economy in the world during the last two decades (average growth rate: 7.7%, prior to the pandemic)
- Low & manageable inflation rate (under 5%)
- Stable exchange rate (USD 1 = 4000 ±5%)

## 1 Market Access & Preferential Trading Status

- ASEAN Market (AEC)
- ASEAN, China, Japan, ROK, Australia & New Zealand (RCEP)
- Cambodia-China Free Trade Agreement
- Cambodia-ROK Free Trade Agreement
- Market access: US, EU, Japan etc.
- GSP

## 2 Competitive Labor Force

- Reasonable wage: (minimum wage in 2021: \$192)
- Young & dynamic labor force (over 70% of population are under 35 years old)

## 3 Strategic Location

- Center of ASEAN: flight time average only 1:30 hour to other ASEAN countries.



# INVESTMENT OPPORTUNITY IN CAMBODIA

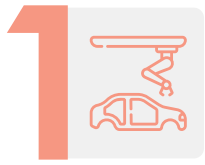
• Legislation & Laws • Promotion and Competitive Advantages



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## Government's Priority Sectors



### NEW INDUSTRIES

Machinery assembly, mechanic/electronic/electric equipment assembly, means of transport assembly, natural resource processing, etc.



### SMES IN ALL SECTORS

Drugs and medical equipment production, construction materials, packaging equipment for export, furniture manufacturing and industrial equipment, etc.



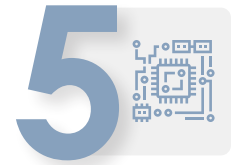
### AGRO-INDUSTRIAL PRODUCTION

For export and domestic use.



### VARIOUS TYPES OF SUPPORTING INDUSTRIES

Agriculture, tourism and textile sectors as well as for industries serving regional production chains with either global markets or global value chains.



### INDUSTRIES OF FUTURE STRATEGIC IMPORTANCE

ICT, energy, heavy industries, cultural/historical/traditional handicraft, and green technology, etc.

## Investment Approval

### Investment Application



CDC issues a  
**Conditional Registration Certificate**  
to the Applicant

**2 working days**



- Company Registration/Ministry of Commerce
- Relevant licenses, as appropriate/Ministry of Industry and Energy
- Review and approval of construction plan/local authorities
- Ministry of Land Management, Urban Planning and Construction
- Initial environment impact assessment/Ministry of Environment
- General Department of Taxation Registration/Ministry of Economy and Finance

**28 working days**



CDC issues a  
**Final Registration Certificate**  
to the Applicant

## Recent Reform Measures

*to Improve Business Environment and Competitiveness:*

### A. Recent Reform Measures

1. Reduce the electricity cost by 2 cents/Kwh from 2019
2. Withdraw CAMCONTROL agents from all ports of entry
3. Cancel the issuance of CO (Certificate of Origin) for goods exported to countries that do not require CO
4. Terminate the mandate of Kampuchea Shipping Agency and Brokers (KAMSAB)
5. Prepare the online procedure on VAT Refund and VAT Credit by General Department of Taxation (GDT)
6. Reduce scanning fees for the export and import of garment, footwear and rice sector
7. Implement the Prakas on Public Services of General Department of Customs and Excise (GDCE) for working days and holidays
8. Reduce public holidays by 7 days starting from 2020

### B. Regulatory Reforms-for better Investment Facilitation *(in the pipeline)*

#### • New Law on Investment

1. Smart Incentive Schemes
2. More effective One Stop Service
3. More investment-friendly
4. Better after-care service

#### • Law on Special Economic Zone

1. Same-standard of fiscal incentives as provided in LOI for SEZ Development Projects and Projects located in SEZ
2. Fast-track One Stop Service inside the SEZs
3. Ready Infrastructures
4. Simplified Investment Registration Procedure
5. Simplified Documents for Import of Raw Materials and Export of Finished Products



D

TOURISM

# Tourism September 2021

- International Tourism Statistics • Inbound Tourism
- Outbound Tourism • Internal Tourism



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## International Tourism Statistics

**2018**

Receipts **4,375** Million USD

Arrivals **6,201,077** People

**2019**

Receipts **4,919** Million USD

Arrivals **6,610,592** People

**2020**

Receipts **1,023** Million USD

Arrivals **1,306,143** People

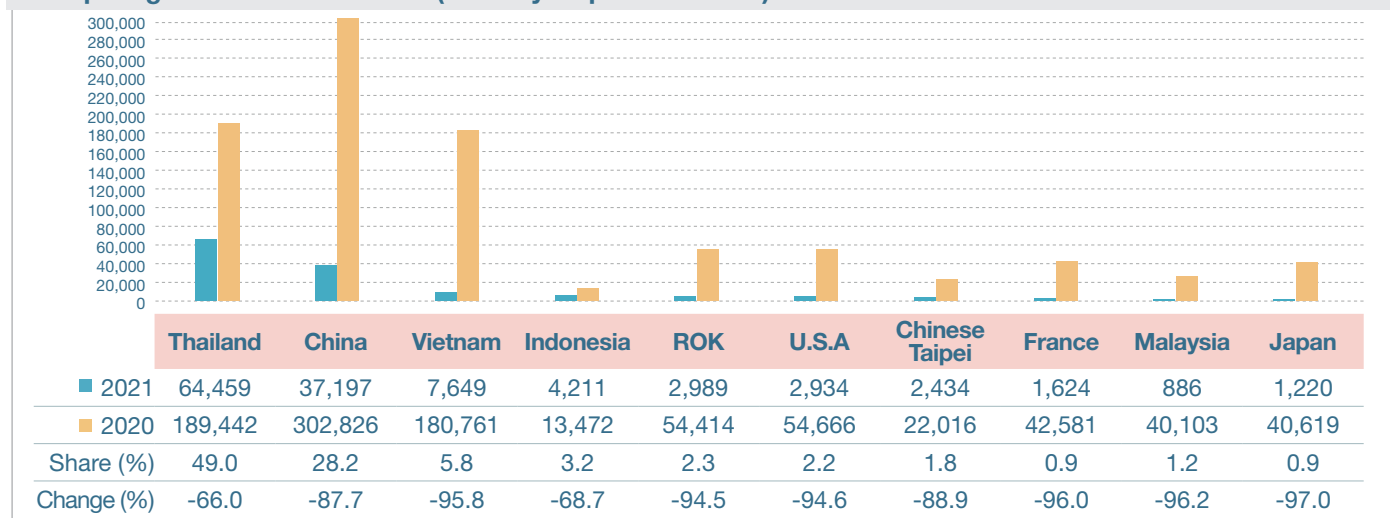
20/19 Change: -80.2%

## Inbound Tourism

### 1. International Tourist Arrivals (January-September 2021)

Inbound Tourism	2019	2020	2021	Share (%)	Change (%)	
				2021	2020/2019	2021/2020
<b>Air</b>	<b>3,393,809</b>	<b>719,177</b>	<b>63,050</b>	<b>47.9</b>	<b>-78.8</b>	<b>-91.2</b>
• Phnom Penh Int'l Airport (PNH)	1,567,927	410,661	55,106	41.9	-73.8	-86.6
• Siem Reap Int'l Airport (REP)	1,276,401	240,884	4	0.0	-81.1	-100.0
• Kong Keng (KOS)	549,481	67,632	7,940	6.0	-87.7	-88.3
<b>Land</b>	<b>1,317,846</b>	<b>477,009</b>	<b>68,622</b>	<b>52.1</b>	<b>-63.8</b>	<b>-85.6</b>
<b>Waterways</b>	<b>102,651</b>	<b>51,494</b>	<b>2</b>	<b>0</b>	<b>-49.8</b>	<b>-100.0</b>
<b>Total</b>	<b>4,814,306</b>	<b>1,247,680</b>	<b>131,674</b>	<b>100.0</b>	<b>-74.1</b>	<b>-89.4</b>

### 2. Top Origins of Tourist Arrivals (January-September 2021)



## Outbound Tourism (January-September 2021)

Outbound Tourism	2019	2020	2021	Change (%)	
				2020/2019	2021/2020
Cambodian Outbound Tourists	1,531,216	317,502	17,059	-79.3	-94.6
International Tourists Departure	4,638,346	1,300,691	145,449	-72.0	-88.8

## Internal Tourism (January-September 2021)

Internal Tourism	2020		2021		Change (%) 2021/2020	
	Khmer	Foreigner	Khmer	Foreigner	Khmer	Foreigner
Phnom Penh	1,315,252	851,439	669,725	97,448	-49.1	-88.6
Siem Reap Angkor	502,741	396,241	120,552	6,167	-76.0	-98.4
Coastal Zone	2,303,852	332,539	1,113,463	57,204	-51.7	-82.8
↳ Preah Sihanouk	513,836	206,130	612,074	47,220	19.1	-77.1
Eco-tourism Zone	494,229	23,732	178,055	2,667	-64.0	-88.8
<b>Total</b>	<b>4,616,074</b>	<b>1,603,951</b>	<b>2,081,795</b>	<b>163,486</b>	<b>-54.9</b>	<b>-89.8</b>



## Tourism Supply by Location

Location	Hotel			Guest House			Restaurant		
	Total	Room	Staff	Total	Room	Staff	Total	Room	Staff
Phnom Penh	424	9,760	13,560	812	10,200	3,900	1,283	87,910	19,410
Kampong Thom	10	449	168	63	932	204	87	4,453	593
Oddor Meanchey	5	279	57	42	547	126	39	1,688	172
Preah Vihear	5	204	62	39	556	148	60	2,782	234
Siem Reap	228	14,580	12,192	248	4,293	1,791	196	14,242	2,361
Sihanouk ville	73	7,077	5,083	91	1,124	385	130	1,406	1,406
Kampot	22	1,098	375	308	3,253	1,044	215	8,225	953
Kep	14	345	338	58	692	244	36	1,544	235
Koh Kong	11	376	131	93	1,035	268	102	3,740	439
Kratie	15	621	153	48	450	104	58	2,189	184
Mondulhiri	11	428	97	51	735	212	34	1,701	179
Rattanakiri	14	625	123	36	504	96	37	1,527	130
Stung Treng	6	258	47	41	496	100	52	2,250	255
Banteay Meanchey	25	1,001	217	78	1,307	209	89	5,106	591
Battambang	49	1,934	708	86	1,667	400	119	8,260	1,185
Pailin	36	1,602	745	26	707	82	78	4,244	666
Pursat	6	363	109	38	473	120	22	1,128	232
Kampong Cham	17	847	284	116	1,327	194	137	7,301	652
Kampong Chhnang	9	300	79	57	568	173	77	3,195	365
Kampong Speu	6	206	130	25	125	185	113	4,406	635
Kandal	2	63	57	84	1,098	288	116	5,772	1,115
Prey Veng	6	139	23	85	793	124	72	2,452	307
Svay Rieng	26	1,622	745	71	1,132	174	78	4,244	666
Takeo	2	40	17	104	1,053	223	96	3,909	529
Tbong Khmum	6	211	51	55	724	133	33	1,584	167
<b>Total</b>	<b>1,028</b>	<b>44,428</b>	<b>35,551</b>	<b>2,755</b>	<b>35,791</b>	<b>10,927</b>	<b>3,359</b>	<b>185,258</b>	<b>33,661</b>

# Tourist Attractions

• Capacity City • Cultural Area • Coastal Area • Eco-Tourism



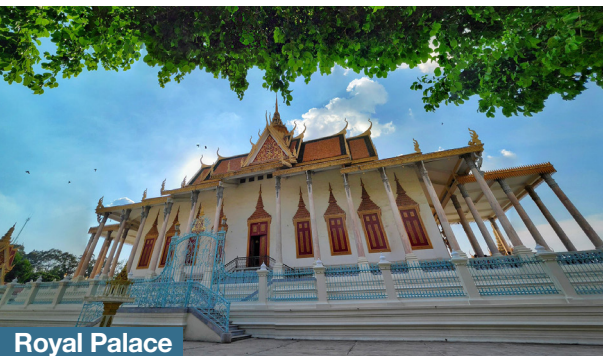
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## Kingdom of Cambodia



## Capital City Phnom Penh & Surroundings



**Royal Palace**

The Royal Palace is a complex of buildings which serves as the loyal residence of the king of Cambodia. The complex includes the Silver Pagoda, the Khemarin Palace, the Throne Hall and the Inner Court.



**National Museum**

The National Museum contains the world's largest collection of Khmer arts including sculptures, ceramics, bronze and ethnographic objects dating from prehistoric times before, during and after the Khmer empire.

# Tourist Attractions

• Capacity City • Cultural Area • Coastal Area • Eco-Tourism



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## Capital City Phnom Penh & Surroundings



**Oudong Mountain**

Oudong Mountain used to be a royal residence and Cambodia's capital from 1618 to 1866. Today, Oudong has become a highly sacred place after the relic of Preah Serei Roek Theat (ashes of Buddha) was moved here from Phnom Penh.



**Wat Phnom**

Wat Phnom was built in 1373 and stands 27 meters above the ground and is the central point of the capital. The site may give you a feeling that you're in a medieval place and the interior has a central altar complex with a large bronze seated Buddha surrounded by other statues and items of devotion and worship.



**Tonle Bati**

On the way to Tonle Bati, you can find two Angkorian era temples including Ta Prohm and Yeay Peau which were built by King Jayavarman VII in the late 12th century in the same period that Angkor Thom and the Bayon temple were constructed.



**Independence Monument**

This monument was built in 1958 to mark Cambodia's independence from France in 1953. The monument is the centre of national ceremonies where soldiers march before the stupa to commemorate service men and women who gave their lives for the country.

## Cultural Area



**Angkor Wat Temple**

Siem Reap Province

The Angkor Wat Temple is the most famous of all Angkorian temples. Back in the 12th century it was built by King Suryavarman II which took an estimated 30 years to build. It was initially dedicated to the Hindu god, Vishnu but was later dedicated to Buddhism and this temple is the only one of the Angkorian temples to remain in religious use throughout the centuries. Angkor Wat became heritage of humanity and was listed as a World Wonder in 1992.



**Bayon Temple**

Siem Reap Province

The Bayon Temple is a richly decorated Khmer temple built in the late 12th century. Bayon's most distinctive feature is the multitude of serene and massive stone faces on the many towers that jut from the upper terrace and cluster around its center park.

# Tourist Attractions

• Capacity City • Cultural Area • Coastal Area • Eco-Tourism



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## Cultural Area



**Banteay Srei Temple**

Banteay Srei was constructed in the 10th century and its name means 'Citadel of Women'. It is made from red sandstone and many of its elements appear in comparatively miniature form making it unique amongst all other Angkorian temples. The decorative and detailed wall carvings which are still observable today make this temple extremely popular and has led to being widely praised as a 'precious gem' or a 'jewel of Khmer art'.



**Sambo Prei Kuh Temple**

This temple was declared as a World Cultural Heritage Site by UNESCO on July 8, 2017 and is an archaeological site in Cambodia located in Kampong Thom Province. The now ruined complex dates back to the Pre-Angkorian Chenla Kingdom from the late 6th century to the 9th century. It was established by King Isanavarman I in the early 7th century as a central royal sanctuary and capital where the site served as an important religious centre for the worship of Shiva as one of the two leading gods of Hinduism.



**Ta Prohm Temple**

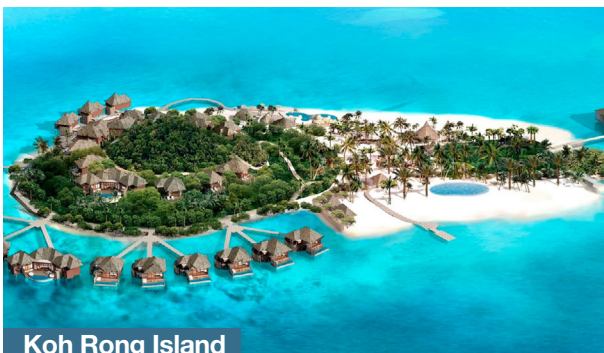
Ta Prohm was built similar in style to Bayon during the late 12th century. It was originally a Mahayana Buddhist monastery and a university. What makes this complex unique is that, unlike most Angkorian Temples, Ta Prohm has been left in the same condition in which it was found. The photogenic and atmospheric combination of trees growing out of the ruins and the jungle surroundings have made it one of Angkor's most popular temples.



**Preah Vihear Temple**

This Khmer temple is situated spectacularly atop of a 525-metre cliff in the Dangrek Mountains located in the Preah Vihear province. It is a Hindu temple dedicated to Shiva and was built during the Khmer Empire. This temple was declared a World Heritage Site by UNESCO on July 7, 2008.

## Coastal Area



**Koh Rong Island**

Koh Rong Island is one of the most gorgeous and loveliest islands in the Cambodia Bay which is located 25 km off the coast of Preah Sihanouk province. Its white sand beaches and turquoise water makes this place a dreamy tropical paradise.

Preah Sihanouk Province



**Kampong Trach Cave**

Located nearly 38 km east from Kampot, Kampong Trach offers beautiful limestone formations with a scattering of caves set in lush countryside.

Kompot Province

# Tourist Attractions

• Capacity City • Cultural Area • Coastal Area • Eco-Tourism



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## Coastal Area



**Koh Kong**

Koh Kong Province

Koh Kong is a quaint but interesting border province that has had a reputation as a 'Wild West' frontier town. It is located at the southwestern tip of Cambodia near the mouth of the Kah Bpow River in Smach Mean Chey district on the Gulf of Thailand, a city only 10 kilometres from the Thai border. Its beaches have the reputation of being one of the best beaches in Southeast Asia.

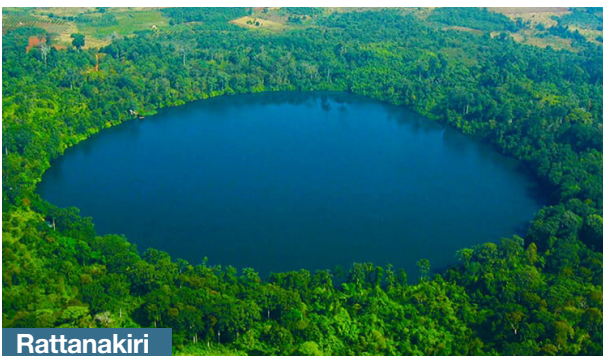


**Kep**

Kep Province

Kep is a relaxing seaside province situated 168 km from Phnom Penh. Besides being known for its beaches, Kep is known for its salt and pepper but is best known particularly for its crabs. This coastal province is perceived as one of the 'must visits' when in Cambodia.

## Eco-Tourism



**Rattanakiri**

Rattanakiri Province

Rattanakiri is renowned for its unique natural beauty and wealth of natural resources. The undulating hills and mountains, plateaus, watershed lowlands, clear crater lakes, rivers and beautiful waterfalls form an impressive itinerary of intriguing destinations for eco-tourism.



**Mondul Kiri**

Mondul Kiri Province

Mondul Kiri literally means 'Meeting of the Hills'. It is one of the most popular destinations for eco-tourism in Cambodia. The land is very rich in natural resources especially hard minerals such as gold and gems which can be found in all five districts of the province. Furthermore, this place is known for its forested hills and beautiful waterfalls.



**Sopheakmith Waterfall**

Stung Treng Province

This waterfall is the biggest waterfall along the Mekong river in Cambodia. This amazing waterfall never ceases to mesmerise visitors. The stretch of the mighty Mekong is also a great place to observe the very rare Irrawaddy dolphins.



**Kratie**

Stung Treng Province

Kratie is a relatively quiet town that is located on the east bank of the Mekong river. A great reason to explore this pleasant town is the possibility to view the local freshwater Irrawaddy dolphin population. It is easy to see the dolphins by taking a 25 minute boat ride that also makes it possible to admire the authentic life of the local Cambodians.



# Wonder of The World

• Intangible Heritage of Humanity • Tangible Heritage of Humanity



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## Intangible Heritage of Humanity



**Apsara Dance**

Apsara Dance “the Royal Ballet of Cambodia”, a masterpiece of Oral and Intangible Heritage of Humanity, Date of Proclamation: November 2003.



**Lkhoan Sbek Thom**

Lkhoan Sbek Thom “the big shadow puppet” a masterpiece of Oral and Intangible Heritage of Humanity, Date of proclamation: November 2005.



**Lkhoan Khorl**

Lkhoan Khorl - The Humanity’s Intangible Cultural heritage, Date of proclamation: November 28, 2018.



**The Tug-Of-War-Game**

“The Tug-Of-War-Game” –The Humanity’s Intangible Cultural Heritage, Date of proclamation: December 02, 2015.

## Tangible Heritage of Humanity & World Wonders



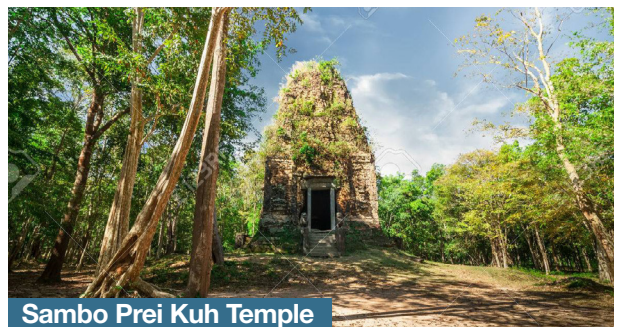
**Angkor Wat**

Angkor Wat Temple-Heritage of Humanity and World Wonder, Date of Proclamation: December 14 1992.



**Preah Vihear Temple**

Preah Vihear Temple-The sacred site of Preah Vihear Temple-The World Heritage, Date of Proclamation: July 07 ,2008.



**Sambo Prei Kuh Temple**

Sambo Prei Kuh Temple-The World Cultural Heritage, Date of Proclamation: July 07,2017.



**The Long-Necked Khmer Lute**

The Humanity’s Intangible Cultural Heritage, Date of proclamation: November 30, 2016.

# Tourism 1998-2019

• Demand Table • Supply Table • Top Ten Tourist Arrivals • Tourism Employment



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## Demand Table

### International Tourist

1998 **0.29** million

2008 **2.13** million

2018 **6.2** million

2019 **6.61** million

 Growth\*  
2,179%

### Domestic Tourist

1998 **1.0** million

2008 **6.7** million

2018 **11** million

2019 **11.3** million

 Growth\*  
1,030%


### Cambodia Outbound Tourist

1998 **50** thousand

2008 **790** thousand

2018 **2** million

2019 **2.04** million

 Growth\*  
3,980%

## Supply Table

### Tourism Industry

Country	1998	2018	2019	Growth Rate
Hotel	216	814	1050	386%
Room	8,247	47,585	49,185	496%
Guest House	147	2,269	2,705	1,740%
Room	1,510	33,951	35,343	2,241%
Restaurant & Food Court	356	2,350	3,415	859%
Chair	34,589	138,392	167,289	384%
Company & Tour Operator	137	725	647	372%
Tour Guide	10	5,661	6,336	63,260%

1

### Ancient Station Inventory

Over 6,000 archeological sites have been registered, including 800 temples and other ancient sites.

2

### Tangible Heritage of Humanity & World Wonders

Angkor Wat

Preah Vihear Temple

Sambo Prei Kuh Temple

3

### Intangible Heritage of Humanity

Apsara Dance

Lhkoan Sbek Thom

The-Tug-of-War Game

The Long-Necked Khmer Lute

Lhkoan Khorl

### Hotel Rate 2018

★ :31 Room: 1,437

★★ :17 Room: 923

★★★ :36 Room: 2,887

★★★★ :39 Room: 4,618

★★★★★ :37 Room: 10,090

### National Park Statistic

National Park	1998	2018
Cultural Park	93	136
Artificial Park	2	59
Natural & Cultural Park	10	27
Natural Park	56	172
Natural Park Community	-	56
<b>Total</b>	<b>161</b>	<b>450</b>



E

AGRICULTURE

# Cambodia Inter-Censal Agriculture Survey 2019

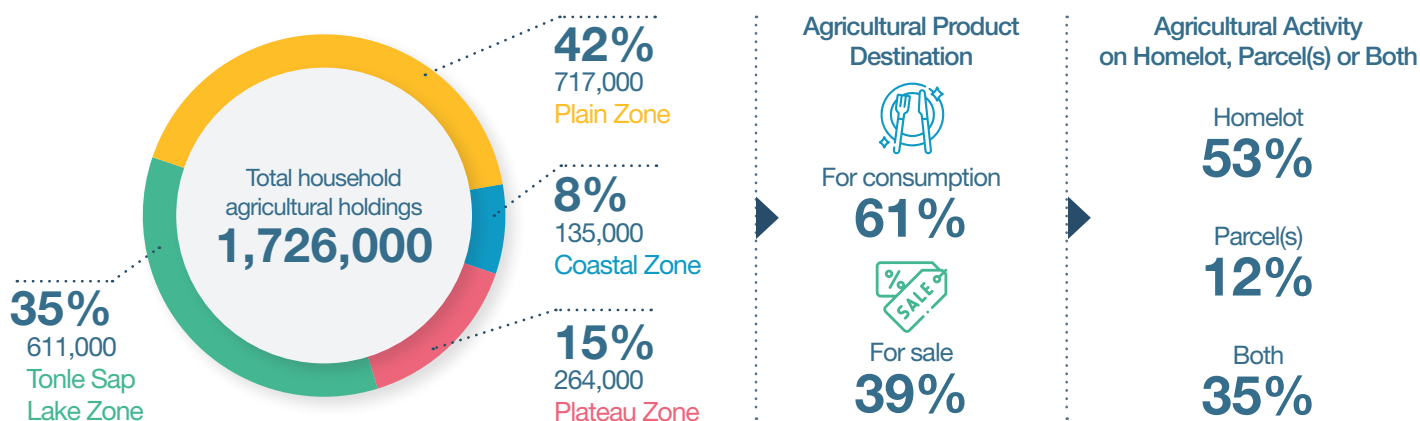
• Household Agricultural Holdings • Crop Production Activity • Livestock & Poultry Raising Activity • Aquaculture & Capture Fishing Activity • Economy



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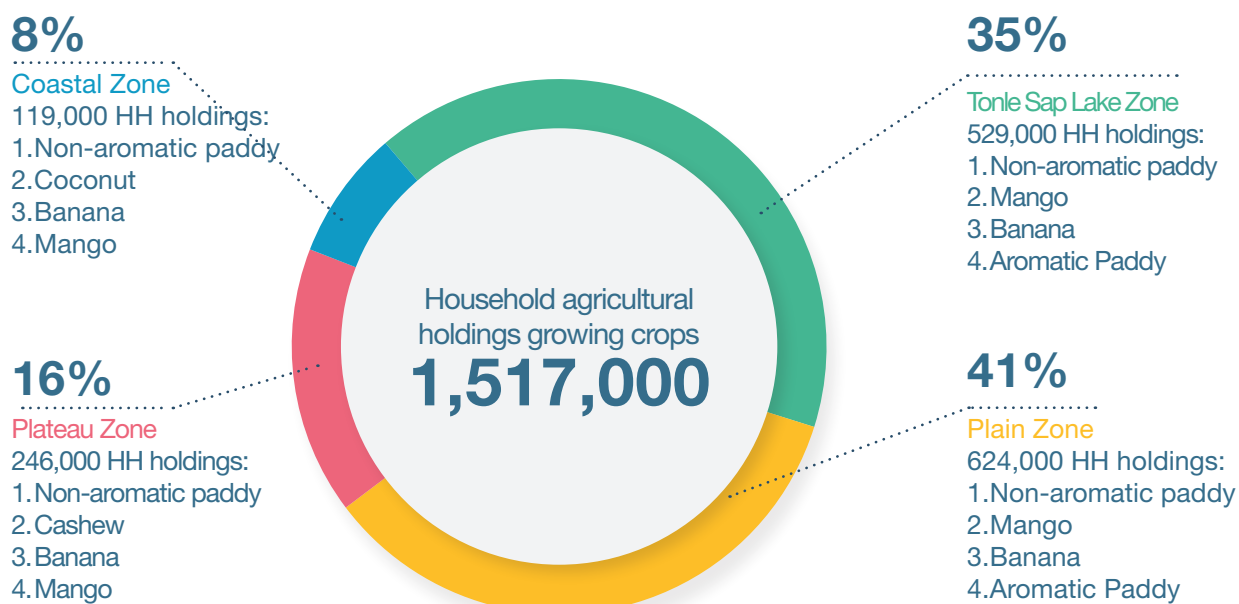
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## Household Agricultural Holdings



## Crop Production Activity

Approximately **1,517,000** of the **1,726,000** household (HH) agricultural holdings were growing crops. The four most prevalent crops in all major four zones of the country:



Crops Type	Total Areas Planted (Hectares)	Total Areas Harvested (Hectares)	Total Production (Tonnes)
Non-Aromatic Paddy	1.48m	1.41m	<b>3.5m</b>
Mango	96,765	55,944	<b>359,758</b>
Banana	10,870	8,375	<b>154,000</b>

Cambodia produces many varieties of fruits including mangoes, bananas, custard apples, dragon fruits, durians, guavas, jackfruits, jambolen plums, longans, milk fruits, papayas and pineapples.

# Cambodia Inter-Censal Agriculture Survey 2019

• Household Agricultural Holdings • Crop Production Activity • Livestock & Poultry Raising Activity • Aquaculture & Capture Fishing Activity • Economy

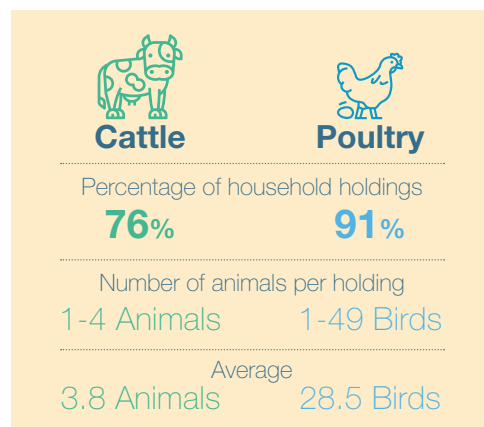
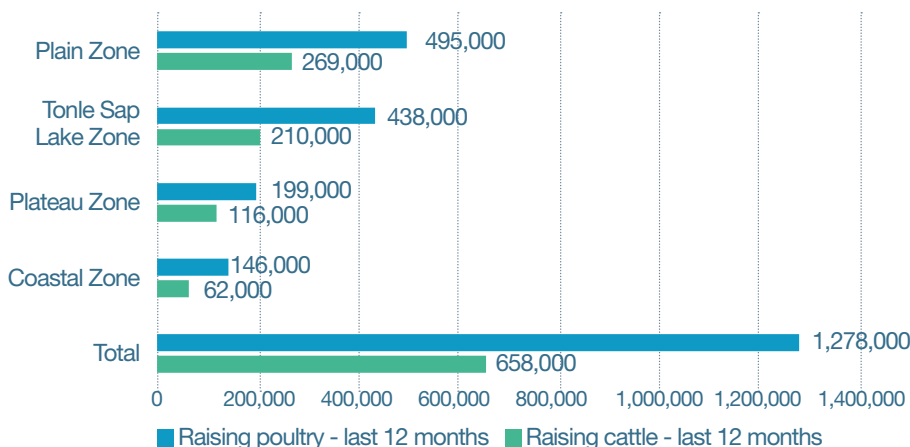


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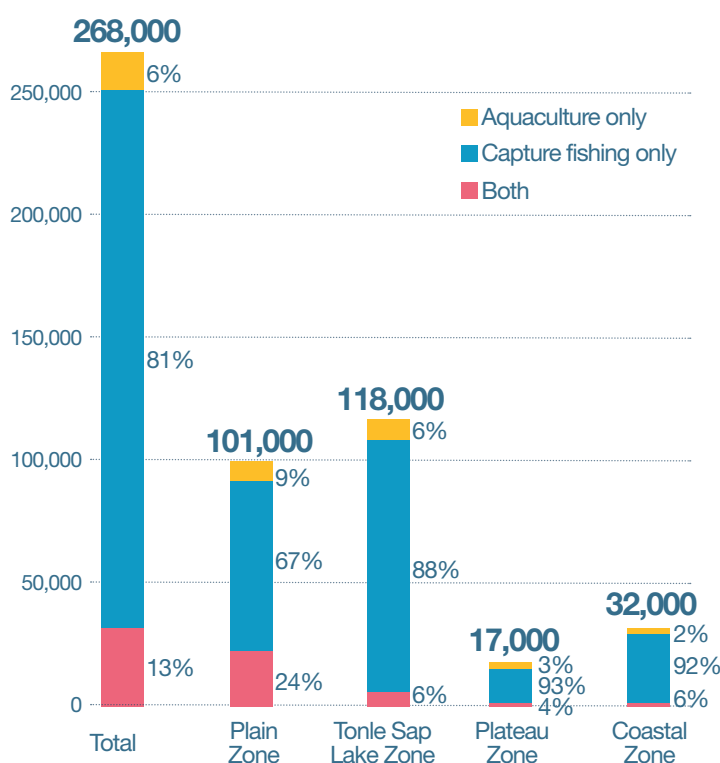
## Livestock & Poultry Raising Activity

Raising livestock and/or poultry provides income to approximately **1,301,000 (75%)** of the **1,726,000** household agricultural holdings. An estimated **1,278,000** holdings reported raising poultry and **658,000** raising cattle.



## Aquaculture & Capture Fishing Activity

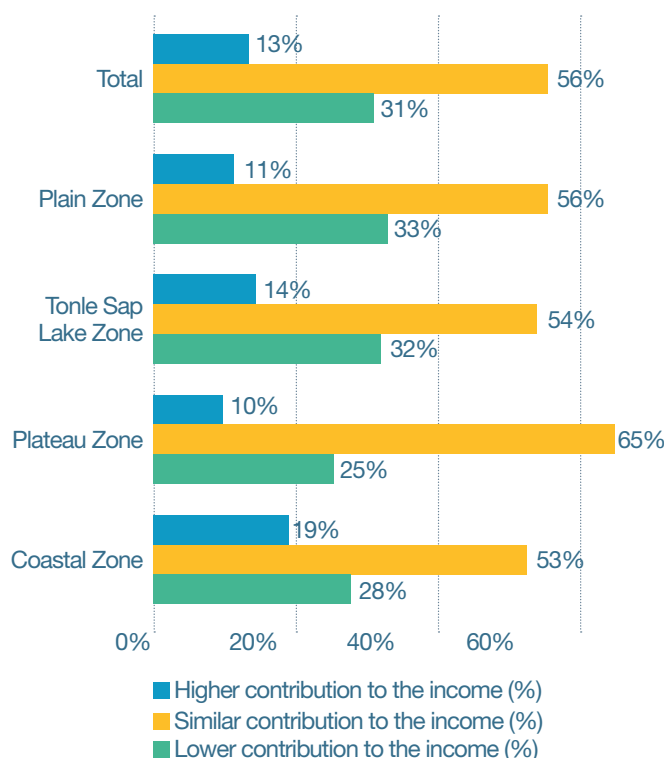
Aquaculture and capture fishing are additional economic activities for **16%** of the household agricultural holdings (~**268,000** holdings).



## Economy

Agriculture remains essential for the livelihoods of the Cambodian population.

Percentage of agricultural income to household's total income:



# Agricultural Export

## (9 months of 2021)



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Agricultural export in the first 9 months of 2021 has increased by 88.48%, in which non-rice agricultural products grew by 107.69% as the export of rice dropped by 15.97% due to the lack of containers and the increase of logistic costs.

### Estimated Value of Agricultural Export (Unit price based on the exporters' receipts)

Total	=	Milled rice	+	Paddy	+	Other Agricultural Products
<b>3,489.8</b>		<b>349.9</b>		<b>428.9</b>		<b>2,710.9</b>
million USD		million USD		million USD		million USD

#### Milled rice

Total export  
**410,698 Tonnes**  
compared to the first  
9 months of 2020  
**-15.97% ↓**

##### Including

All types of fragrant rice  
**288,831 tonnes (70.33%)**

All types of white rice  
**114,469 tonnes (27.87%)**

Parboiled rice  
**7,398 tonnes (1.80%)**

##### Export Destination

22 countries in the EU  
**104,222 Tonnes**  
**-35.51% ↓**

China  
**203,279 Tonnes**  
**18.26 ↑**

7 countries in ASEAN  
**41,476 Tonnes**  
**-38.49% ↓**

Others (23 countries)  
**61,721 Tonnes**  
**-29.73% ↓**

##### Exporting Companies

**59 companies**

Among those companies,  
there are 10 major companies  
that exported 299,533 tonnes,  
or 72.94%

#### Paddy

Total export to Vietnam  
**2,523,263 Tonnes**  
(162,740.02 tonnes with  
Phytosanitary certificate)  
compared to the first  
9 months of 2020  
**81.23% ↑**

#### Non-Rice Agricultural Products

Total export  
**3,894,485 Tonnes**  
compared to the first  
9 months of 2020  
**46.47% ↑**

Dried Cassava Chips  
**1,308,943 Tonnes**  
**8.84% ↑**  
(Export to Thailand 859,840,  
Vietnam 429,452 tonnes, and  
China 19,652 tonnes)

Fresh Cassava  
**575,920 Tonnes**  
**9.47% ↑**  
(Export to Vietnam 386,420 tonnes  
and Thailand 189,500 tonnes)

Tapioca Starch  
**22,397 Tonnes**  
**13.41% ↑**  
(Export to China 19,869 tonnes, Thailand  
1,376 tonnes, Italy 694 tonnes, the  
U.S. 170 tonnes, Netherlands 152 tonnes  
and Belgium 136 tonnes)

Cassava Pulps  
**6,052 Tonnes**  
**-37.10% ↓**  
(Export to China)

#### Cashew Nuts

**892,536 Tonnes**  
**337.07% ↑**  
(Export to Vietnam 885,140 tonnes, China 3,897  
tonnes, Thailand 3,305 tonnes, India 99 tonnes,  
Japan 44 tonnes, R.O.K 17 tonnes, Arab Nations  
15 tonnes, Netherlands 8 tonnes, Bangladesh 7  
tonnes, Laos 4 tonnes, Switzerland 0.02 tonne,  
Togo 0.01 tonne, UAE 0.01 tonne)

#### Corn Kernels

**154,459 Tonnes**  
**-20.36% ↓**  
(Export to Vietnam 111,170 tonnes, Thailand  
42,350 tonnes, Chinese Taipei 876 tonnes,  
Bangladesh 42 tonnes, and R.O.K 21 tonnes)

#### Beans/Green Mung Beans

**25,330 Tonnes**  
**419.09% ↑**  
(Export to Vietnam)  
**Soy Beans**  
**27,960 Tonnes**  
**347.36% ↑**  
(Export to Vietnam 19,110 tonnes, Thailand  
8,850 tonnes and UAE 0.04 tonne)

#### Fresh Banana

**343,812 Tonnes**  
**46.20% ↑**  
(Export to China 301,629 tonnes, Vietnam  
41,169 tonnes, Japan 534 tonnes, and  
Singapore 480 tonnes)

#### Grapefruits

**34,918 Tonnes**  
**130.48% ↑**  
(Export to Thailand 34,854 tonnes  
and Vietnam 64 tonnes)

#### Fresh Mangoes

**172,847 Tonnes**  
**174.71% ↑**  
(Export to Vietnam 147,974 tonnes,  
Thailand 24,469 tonnes, China 212 tonnes,  
R.O.K 124 tonnes, Hong Kong 51 tonnes,  
Singapore 16 tonnes, and Kuwait 0.01 tonne)

#### Mango Jam

**14,462 Tonnes**  
**189.31% ↑**  
(Export to China 11,794 tonnes Thailand  
1,293 tonnes, Philippines 736 tonnes, Japan  
513 tonnes, Vietnam 77 tonnes, England 21  
tonnes, R.O.K 18 tonnes, the U.S. 9 tonnes,  
Chinese Taipei 3 tonnes, Kazakhstan 0.05  
tonne, and Russia 0.001 tonne)

#### Mango Syrup

**4,131 Tonnes**  
**66.77% ↑**  
(Export to Philippines 3,983 tonnes  
and China 148 tonnes)

#### Palm Oil

**45,797 Tonnes**  
**0.98% ↑**  
(Export to India 35,017 tonnes,  
and Malaysia 10,780 tonnes)

#### Peppers

**27,317 Tonnes**  
**562.71% ↑**  
(Export to Vietnam 26,687 tonnes, Germany  
314 tonnes, Thailand 180 tonnes, India 42  
tonnes, France 31 tonnes, Belgium 16 tonnes,  
Chinese Taipei 15 tonnes, Poland 7 tonnes,  
Czech 6 tonnes, Japan 3 tonnes, R.O.K 3  
tonnes, Russia 2 tonnes, Singapore 2 tonnes,  
the U.S. 2 tonnes, Switzerland 2 tonnes,  
Sweden 1 tonne, the U.K 1 tonne, Australia  
0.9 tonne, Canada 0.5 tonne, Kazakhstan 0.2  
tonne, and UAE 0.01 tonne)

#### Tabacco

**2,514 Tonnes**  
**-53.58% ↓**  
(Export to Vietnam 2,433 tonnes, Belgium 59  
tonnes, Hungary 19.8 tonnes, Bosnia and  
Herzegovina 1.9 tonnes, China 0.1 tonne,  
Indonesia 0.02 tonne, Singapore 0.01 tonne  
and Germany 0.001 tonne)

#### Vegetables

**77.5 Tonnes**  
**-11.50% ↓**  
(Export to France)

#### Fresh Chillies

**80,327 Tonnes**  
**45.64% ↑**  
(Export to Thailand 80,327.12 tonnes and  
UAE 0.02 tonne)

#### Dried Chillies

**1,740 Tonnes**  
**16.02% ↑**  
(Export to Thailand 1,740 tonnes, Belgium  
0.21 tonnes, R.O.K 0.01 tonne, and  
Canada 0.01 tonne)

#### Other 74 Agricultural Products

**152,946 Tonnes**

# ការនាំចេញកសិផល ៩ខែ ឆ្នាំ២០២១



ព្រះរាជាណាចក្រកម្ពុជា  
រដ្ឋស្ថាបនាសម្រេច  
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ការនាំចេញកសិផលសរុបក្នុងរយៈពេល ៩ខែ ឆ្នាំ២០២១ មានកំណើនចំនួន ៨៨,៤៨% ក្នុងនោះកសិផលក្រៅពីអង្ករមានការកើនឡើងចំនួន ១០៧,៦៩% រីឯការនាំចេញអង្ករមានការថយចុះចំនួន -១៥,៩៧% ដោយសារកង្វះទូរកុងតឺន័រសម្រាប់ផ្ទុក និងការកើនឡើងនៃតម្លៃដឹកជញ្ជូន។

ការប៉ាន់ស្មានតម្លៃនៃការនាំចេញកសិផល (ឯកតាតម្លៃផ្អែកតាមវិក្កយបត្ររបស់អ្នកនាំចេញ)៖

$$\begin{array}{r}
 \text{សរុប} \\
 \mathbf{3\ 489,8} \\
 \text{លានដុល្លារអាមេរិក}
 \end{array}
 =
 \begin{array}{r}
 \text{អង្ករ} \\
 \mathbf{349,9} \\
 \text{លានដុល្លារអាមេរិក}
 \end{array}
 +
 \begin{array}{r}
 \text{ស្រូវ} \\
 \mathbf{428,9} \\
 \text{លានដុល្លារអាមេរិក}
 \end{array}
 +
 \begin{array}{r}
 \text{កសិផលផ្សេងៗ} \\
 \mathbf{2\ 710,9} \\
 \text{លានដុល្លារអាមេរិក}
 \end{array}$$

### អង្ករ

ការនាំចេញសរុប  
**៤១០ ៦៩៨ តោន**  
ធៀបនឹង ៩ខែ ២០២០  
**-១៥,៩៧% ↓**

#### ក្នុងនោះមាន

- អង្ករក្រអូបគ្រប់ប្រភេទ  
២៨៨ ៨៣១ តោន (៧០,៣៣%)
- អង្ករសគ្រប់ប្រភេទ  
១១៤ ៤៦៩ តោន (២៧,៨៧%)
- អង្ករចំបុយ  
៧ ៣៩៨ តោន (១,៨០%)

#### ទិសដៅនាំចេញ

- ២២ប្រទេសនៃសហភាពអឺរ៉ុប  
**១០៤ ២២២ តោន**  
**-៣៥,៥១% ↓**
- ប្រទេសចិន  
**២០៣ ២៧៩ តោន**  
**១៨,២៦% ↑**
- ៧ប្រទេសនៃអាស៊ាន  
**៤១ ៤៧៦ តោន**  
**-៣៨,៤៩% ↓**

ទិសដៅផ្សេងៗ (២៣ប្រទេស)  
**៦១ ៧២១ តោន**  
**-២៩,៧៣% ↓**

#### ក្រុមហ៊ុននាំចេញ

**៥៩ ក្រុមហ៊ុន**  
ក្នុងនោះមានក្រុមហ៊ុនធំៗ  
ចំនួន ១០ នាំចេញរហូតដល់  
២៩៩ ៥៣៣តោន ឬ ៧២,៩៤%

### ស្រូវ

ការនាំចេញទៅកាន់រដ្ឋាភិបាលសរុប  
**២ ៥២៣ ២៦៣ តោន**  
(មានវិញ្ញាបនបត្រកូតតាមអនាម័យ  
ចំនួន ១ ៦២៧ ៧៤០,០២ តោន)  
ធៀបនឹង ៩ខែ ២០២០  
**៨១,២៣% ↑**

### កសិផលក្រៅពីស្រូវ-អង្ករ

ការនាំចេញសរុប  
**៣ ៨៩៤ ៤៨៥ តោន**  
ធៀបនឹង ៩ខែ ២០២០  
**៤៦,៤៧% ↑**

#### ចំណែកដំឡូងមីក្រៀម

**១ ៣០៨ ៩៤៣ តោន**  
**៨,៨៤% ↑**  
(នាំចេញទៅចំ ៨៥៩ ៨៤០ តោន, រដ្ឋាភិបាល  
៤២៩ ៤៥២ តោន, និងចិន ១៩ ៦៥២ តោន)

#### ដំឡូងមីស្រស់

**៥៧៥ ៩២០ តោន**  
**៩,៤៧% ↑**  
(នាំចេញទៅរដ្ឋាភិបាល ៣៨៦ ៤២០ តោន,  
និងចំ ១៨៩ ៥០០ តោន)

#### ឃ្មៅដំឡូងមី

**២២ ៣៩៧ តោន**  
**១៣,៤១% ↑**  
(នាំចេញទៅចិន ១៩ ៨៦៩ តោន, ថៃ ១ ៣៧៦ តោន,  
អ៊ីតាលី ៦៩៤ តោន, អាមេរិក ១៧០ តោន,  
ណេដឺឡែន ១៥២ តោន និងប៊ែលហ្សិក ១៣៦ តោន)

#### កាកសំណល់ដំឡូងមី

**៦ ០៥២ តោន**  
**-៣៧,១០% ↓**  
(នាំចេញទៅប្រទេសចិន)

#### គ្រាប់ស្វាយចន្ទី

**៨៩២ ៥៣៦ តោន**  
**៣៣៧,០៧% ↑**  
(នាំចេញទៅរដ្ឋាភិបាល ៨៨៥ ១៤០ តោន, ចិន ៣ ៨៩៧  
តោន, ថៃ ៣ ៣០៥ តោន, ឥណ្ឌា ៩៩ តោន, ជប៉ុន ៤៤ តោន,  
កូរ៉េ ១៧ តោន, អាហ្វ្រិក ១៥ តោន, ណេដឺឡែន ៨ តោន,  
បង់ក្លាដេស ៧ តោន, ឡាវ ៤ តោន, ស្វីស ០,០២តោន,  
តួហ្គោ ០,០១តោន និងអាហ្វ្រិក ០,០១តោន)

#### គ្រាប់ពោត

**១៥៤ ៤៥៩ តោន**  
**-២០,៣៦% ↓**  
(នាំចេញទៅរដ្ឋាភិបាល ១១១ ១៧០ តោន, ថៃ ៤២ ៣៥០  
តោន, កោះតៃវ៉ាន់ ៨៧៦ តោន, បង់ក្លាដេស ៤២ តោន,  
និងកូរ៉េ ២១តោន)

#### គ្រាប់សណ្តែកបាយ

**២៥ ៣៣០ តោន**  
**៤១៩,០៩% ↑**  
(នាំចេញទៅរដ្ឋាភិបាល)

#### គ្រាប់សណ្តែកសៀង

**២៧ ៩៦០ តោន**  
**៣៤៧,៣៦% ↑**  
(នាំចេញទៅរដ្ឋាភិបាល ១៩ ១១០តោន,  
ថៃ ៨ ៨៥០តោន និងអាហ្វ្រិក ០,០៤តោន)

#### ផ្លែចេកស្រស់

**៣៤៣ ៨១២ តោន**  
**៤៦,២០% ↑**  
(នាំចេញទៅចិន ៣០១ ៦២៩ តោន,  
រដ្ឋាភិបាល ៤១ ១៦៩ តោន, ជប៉ុន ៥៣៤ តោន  
និងសិង្ហបុរី ៤៨០ តោន)

#### ផ្លែក្រូចថ្លុង

**៣៤ ៩១៨ តោន**  
**១៣០,៤៨% ↑**  
(នាំចេញទៅចំ ៣៤ ៨៥៨ តោន និងរដ្ឋាភិបាល ៦០ តោន)

#### ផ្លែស្វាយស្រស់

**១៧២ ៨៤៧ តោន**  
**១៧៤,៧១% ↑**  
(នាំចេញទៅរដ្ឋាភិបាល ១៤៧ ៩៧៤ តោន, ថៃ ២៤ ៨៧៩  
តោន, ចិន ២១២ តោន, កូរ៉េ ១២៤ តោន, ហុងកុង  
៥១តោន, សិង្ហបុរី ១៦ តោន និងកម្ពុជា ០,០១តោន)

#### ដំណប់ស្វាយ

**១៤ ៤៦២ តោន**  
**១៨៩,៣១% ↑**  
(នាំចេញទៅចិន ១១ ៧៩៤ តោន, ថៃ ១ ២៩៣ តោន,  
ហ្វីលីពីន ៧៣៦ តោន, ជប៉ុន ៥១៣ តោន, រដ្ឋាភិបាល  
៧៧ តោន, អង់គ្លេស ២១ តោន, កូរ៉េ ១៨តោន,  
អាមេរិក ៩ តោន, កោះតៃវ៉ាន់ ៣ តោន, កាហ្សាក់ស្ថាន  
០,០៥តោន និងស្រុយី ០,០០១តោន)

#### ទឹកស្អីស្វាយ

**៤ ១៣១ តោន**  
**៦៦,៧៧% ↑**  
(នាំចេញទៅប៊ែលហ្សិក ៣ ៩៨៣ តោន  
និងចិន ១៤៨តោន)

#### ដូងប្រេង

**៤៥ ៧៩៧ តោន**  
**០,៩៨% ↑**  
(នាំចេញទៅឥណ្ឌា ៣៥ ០១៧ តោន  
និងម៉ាឡេស៊ី ១០ ៧៨០ តោន)

#### ប្រេង

**២៧ ៣១៧ តោន**  
**៥៦២,៧១% ↑**  
(នាំចេញទៅរដ្ឋាភិបាល ២៦ ៦៨៧ តោន, អាឡឺម៉ង់  
៣១៤ តោន, ថៃ ១៨០ តោន, ឥណ្ឌា ៤២ តោន, បារាំង  
៣១ តោន, ប៊ែលហ្សិក ១៦ តោន, កោះតៃវ៉ាន់ ១៥ តោន,  
ប៉ូឡូញ ៧ តោន, ឆេក ៦តោន, ជប៉ុន ៣តោន, កូរ៉េ ៣  
តោន, ស្រុយី ២តោន, សិង្ហបុរី ២ តោន, អាមេរិក ២ តោន,  
ស្វីស ២ តោន, ស្វយទិច ១ តោន, ចក្រភពអង់គ្លេស ១  
តោន, អូស្ត្រាលី ០,៩ តោន, កាណាដា ០,៥ តោន,  
កាហ្សាក់ស្ថាន ០,២ តោន និងអាហ្វ្រិក ០,០១តោន)

#### ប្រាំង

**២ ៥១៤ តោន**  
**-៥៣,៥៨% ↓**  
(នាំចេញទៅរដ្ឋាភិបាល ២ ៤៣៣ តោន, ប៊ែលហ្សិក ៥៩  
តោន, ហុងកុង ១៩,៨ តោន, បូស្ស៊ី និងហ៊ីហ្ស្រហ្គាណា  
១,៩ តោន, ចិន ០,១ តោន, ឥណ្ឌូនេស៊ី ០,០២ តោន,  
សិង្ហបុរី ០,០១ តោន និងអាឡឺម៉ង់ ០,០០១តោន)

#### បន្លែចម្រុះ

**៧៧,៥ តោន**  
**-១១,៥០% ↓**  
(នាំចេញទៅបារាំង)

#### ម្ទេសស្រស់

**៨០ ៣២៧ តោន**  
**៤៥,៦៤% ↑**  
(នាំចេញទៅថៃ ៨០ ៣២៧,១២ តោន និង  
អាហ្វ្រិក ០,០០២តោន)

#### ម្ទេសក្រៀម

**១ ៧៤០ តោន**  
**១៦,០២% ↑**  
(នាំចេញទៅថៃ ១៧៤០ តោន, ប៊ែលហ្សិក ០,២១តោន,  
កូរ៉េ ០,០១ តោន និងកាណាដា ០,០១តោន)

#### កសិផល ៧៤មុខផ្សេងៗទៀត

**១៥២ ៩៤៦ តោន**

ប្រភព៖ ព័ត៌មានទិន្នន័យ ៨៣២២ កាណា ចេញផ្សាយដោយវិទ្យាស្ថានស្រាវជ្រាវកសិកម្ម និងសហប្រតិបត្តិការអន្តរជាតិ ឆ្នាំ២០២១ - ក្រុងភ្នំពេញ និងប្រទេសប្រជាមានិតចិន

ក្រុមការងារសម្របសម្រួលការទូតសេដ្ឋកិច្ច - ការនាំចេញកសិផល ០៩៩ ឆ្នាំ២០២១ - រដ្ឋាភិបាល ឆ្នាំ២០២១



PUBLIC  
FINANCE



# Budget in Brief 2021



- Macroeconomic • Budget Framework • Budget
- Approaches and Principles of Budget Framework for 2021

## Macroeconomic (2019-2021)

Economic Indicators	2019 Implemented	2020 Estimated	2021 Projected
GDP at Current Prices (Billion Riel)	110,014	110,653	117,939
GDP Growth (%)	7.1	-1.9	3.5
GPD per Capita (USD)	1,700	1,683	1,771
Inflation Rate (%)	1.8	2.8	3.1
Exchange Rate (USD/Riel)	4,055	4,065	4,065
Current Account Balance (% of GDP)	-15.5	-17.6	-17.3
International Reserve (Million USD)	18,763	16,937	16,981
International Reserve (Month of import)	8.8	8.5	8.0

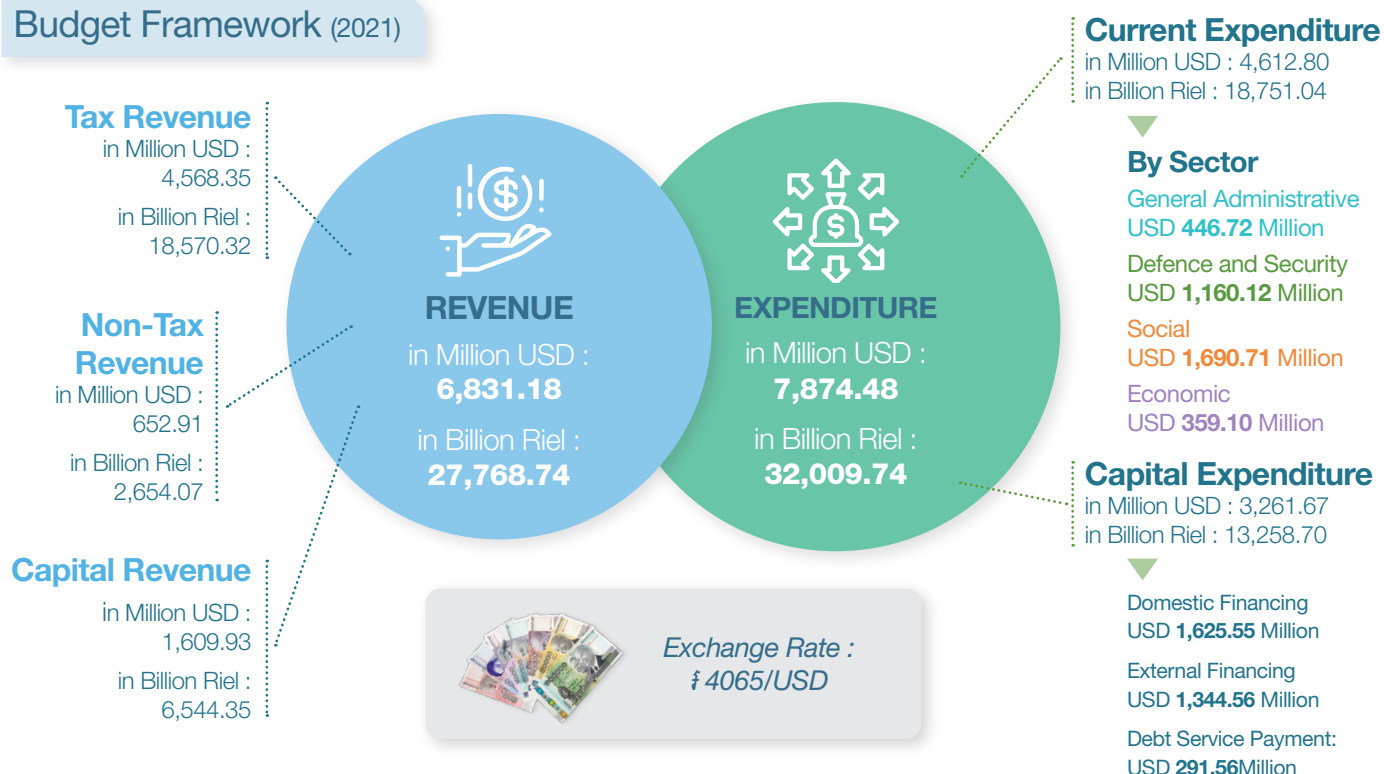
## Budget Framework (2019-2021)

Budget Indicators (% of GDP)	2019		2020		2021	
	Budget Law	Implemented	Budget Law	Budget Law	Budget Law	Budget Law
Revenues	19.26%	25.26%	23.80%	18.18%		
↳ Current Revenues	19.08%	25.10%	23.63%	18.0%		
Expenditure	24.69%	26.07%	30.13%	27.14%		
↳ Current Expenditure	16.28%	17.06%	17.91%	15.90%		
Current Surplus	2.80%	8.03%	5.72%	2.10%		
Total of Deficit	-5.43%	-0.81%	-6.33%	-8.96%		

## Approaches and Principles of Budget Framework for 2021

- 1 Prevent and reduce the impact of COVID-19
- 2 Strive to achieve the economic growth within **3,5%**
- 3 Ensure macroeconomic and financial stability
- 4 Maintain the livelihood and social stability
- 5 Continue to implement key reform programs of the Royal Government of Cambodia

## Budget Framework (2021)





The **global economy** is estimated to expand by 6% in 2021 due to the economic recovery packages introduced by advanced economies, the acceleration of vaccination programs in Q2 2021, economic adaptations to the New Normal, and regional economic recoveries throughout 2021. In Q1 2021, Cambodia experienced a decline in economic activity across sectors such as tourism, construction, investments, and garment exports. On a positive note, exports such as bicycles, electronic components, wood products, and agricultural products have maintained a moderate level of growth.

### BUDGET IMPLEMENTATION

25.7%  
of Budget Law 2021

-7.5% ↓

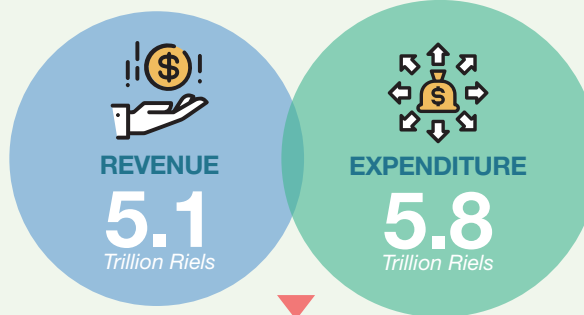
Current Revenue

5.1

Trillion Riels

-7.5% ↓

Due to the decline of economic activity, tax relief programs and non-tax incentives.



19.6%  
of Budget Law 2021

4.2% ↑

Current Expenditure

3.5

Trillion Riels

-12.7% ↓

CURRENT SURPLUS

1.6  
Trillion Riels

\*All changes are compared to Q1 2020

### CURRENCY



General Currency

143.4

Trillion Riels

20.3% ↑

International Reserves

20.3

Billion USD

10% ↑

Lending by Commercial Bank

138.4

Trillion Riels

22.8% ↑

### TRADE

Imports

7.5

Billion USD

48.7% ↑

Due to growth in imports of textiles, clothes, construction materials, medicines, and foodstuffs.



Exports

3.8

Billion USD

7% ↑

Due to growth in exports of bicycles, electronic components, agricultural products.

### INVESTMENT



Foreign Investment Projects Outside SEZ

Approved

28

Projects

17 ↓

Investment Fund

679.6

Million USD

-25.8% ↓

Due to decline in construction projects in tourism centers, hotels, healthcare centers and garment factories.

### TOURISM



International Tourist Arrivals

70,901

-93.9% ↓

Due to travel restrictions.

### CONSTRUCTION



1,066

Approved Projects

50 projects or -4.5% ↓

Due to the suspension of construction of public sectors, commercial, tourism and housing projects.

# ព្រឹត្តិបត្រស្ថិតិសេដ្ឋកិច្ច និងហិរញ្ញវត្ថុ ប្រចាំត្រីមាសទី១ ឆ្នាំ២០២១

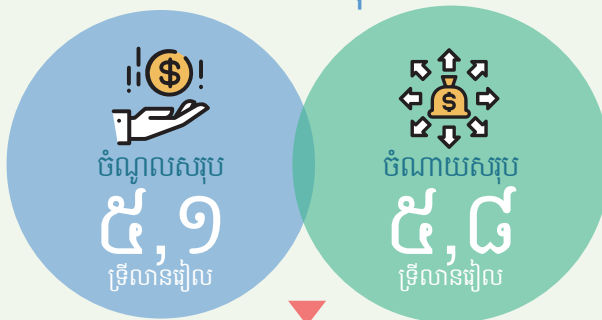


ព្រះរាជាណាចក្រកម្ពុជា  
ក្រសួងការបរទេស  
និងសហប្រតិបត្តិការអន្តរជាតិ  
ក្រុមការងារសម្របសម្រួល  
ការទូតសេដ្ឋកិច្ច

សេដ្ឋកិច្ចសកលក្នុងឆ្នាំ២០២១ ត្រូវបានប៉ាន់ស្មានថាកើនឡើងក្នុងអត្រា ៦% ដោយសារការព្យាបាលវិស័យសេដ្ឋកិច្ចនៅក្នុងប្រទេសធំៗ ការបង្កើនល្បឿនចាក់វ៉ាក់សាំងក្នុងត្រីមាសទី២ ឆ្នាំ២០២១ ការបន្តរំខានទៅនឹងសកម្មភាពសេដ្ឋកិច្ចនៅក្នុងប្រក្រតីភាពគន្លងថ្មី (New Normal) និងការងើបឡើងវិញនៃសកម្មភាពសេដ្ឋកិច្ចនៅក្នុងតំបន់នាចុងឆ្នាំ២០២០។ ក្នុងត្រីមាសទី១ ឆ្នាំ២០២១នេះ យើងឃើញមានការធ្លាក់ចុះនៃសកម្មភាពសេដ្ឋកិច្ចក្នុងវិស័យទេសចរណ៍ សំណង់ វិនិយោគ និងការនាំចេញសម្លៀកបំពាក់។ យ៉ាងណាមិញ ផលិតផលនាំចេញផ្សេងទៀតដូចជា កង់ គ្រឿងបន្លាស់អេឡិចត្រូនិក ផលិតផលឈើ និងផលិតផលកសិកម្ម បាននិងកំពុងរក្សាកំណើនល្អ ។

## ស្ថានភាពហិរញ្ញវត្ថុសាធារណៈ

២៥,៧%  
នៃច្បាប់ថវិកាឆ្នាំ២០២១  
-៧,៥% ↓  
ចំណូលចរន្ត  
៥,១  
ទ្រីលានរៀល  
-៧,៥% ↓



១៩,៦%  
នៃច្បាប់ថវិកាឆ្នាំ២០២១  
៤,២% ↑  
ចំណាយចរន្ត  
៣,៥  
ទ្រីលានរៀល  
-១២,៧% ↓

ការអនុវត្តថវិកាមានអតិរេកចំនួន

១,៦  
ទ្រីលានរៀល

ដោយសារការថយចុះសកម្មភាពសេដ្ឋកិច្ច និងការបន្តបន្ថយកាតព្វកិច្ចពន្ធ និងមិនមែនពន្ធ

របៀបរៀបរយទៅនឹងត្រីមាសទី១ ឆ្នាំ២០២០

### ស្ថានភាពរូបិយវត្ថុ



រូបិយវត្ថុទូទៅ  
១៤៣,៤  
ទ្រីលានរៀល  
២០,៣% ↑

ទុនបម្រុងរូបិយបណ្ណបរទេសដុល  
២០,៣  
ប៊ីលានរៀល  
១០% ↑

ឥណទានដែលផ្តល់ដោយធនាគារពាណិជ្ជ  
១៣៨,៤  
ទ្រីលានរៀល  
២២,៨% ↑

### ពាណិជ្ជកម្ម

ការនាំចូល  
៧,៥  
ប៊ីលានរៀល  
៤៨,៧% ↑

ដោយសារកំណើននាំចូលវាយនភណ្ឌ និងសម្លៀកបំពាក់ បរិក្ខារសំណង់ ថ្នាំពេទ្យ និងគ្រឿងឧបកោសបរិកោស។



ការនាំចេញ  
៣,៨  
ប៊ីលានរៀល  
៧% ↑

ដោយសារកំណើននាំចេញផលិតផលមិនមែនកាត់ដេរ ដូចជា កង់ គ្រឿងបង្ហូរអេឡិចត្រូនិក និងផលិតផលកសិកម្ម។

### វិនិយោគ



គម្រោងវិនិយោគក្រៅតំបន់សេដ្ឋកិច្ចពិសេស  
អនុម័តបាន  
២៨  
គម្រោង  
១៧ ↓

ទុនវិនិយោគ  
៦៧៩,៦  
លានដុល្លារ  
-២៥,៨% ↓

ដោយសារការធ្លាក់ចុះនៃគម្រោងសាងសង់ផ្នែកទេសចរណ៍ សណ្ឋាគារ មជ្ឈមណ្ឌលសេវាកម្មសុខាភិបាល និងរោងចក្រកាត់ដេរ។

### ទេសចរណ៍



ភ្ញៀវទេសចរអន្តរជាតិសរុប  
៧០ ៩០១ នាក់  
-៩៣,៩% ↓  
ដោយសារការរឹតត្បិតការធ្វើដំណើរ

សំណង់  
អនុម័តបាន  
១ ០៦៦  
គម្រោង

៥០គម្រោង ឬ -៤,៥% ↓  
ដោយសារការថយចុះនៃគម្រោងសំណង់ផ្នែកសាធារណៈ លំនៅឋាន ពាណិជ្ជកម្មទេសចរណ៍ និងសំណង់វិនិយោគ។

ប្រភព៖ ព្រឹត្តិបត្រស្ថិតិសេដ្ឋកិច្ច និងហិរញ្ញវត្ថុ ប្រចាំត្រីមាសទី១ ឆ្នាំ២០២១ | ក្រសួងសេដ្ឋកិច្ច និងហិរញ្ញវត្ថុ

ក្រុមការងារសម្របសម្រួលការទូតសេដ្ឋកិច្ច - ព្រឹត្តិបត្រស្ថិតិសេដ្ឋកិច្ច និងហិរញ្ញវត្ថុប្រចាំត្រីមាសទី១ ឆ្នាំ២០២១ - ចេញផ្សាយនៅខែកញ្ញា ឆ្នាំ២០២១



## BUDGET LAW 2021

REVENUE	20,526,394 Million Riels
EXPENDITURE	27,265,898 Million Riels

In response to the protracted impact of the February 20 community event, the Royal Government has promptly initiated a series of timely interventions, such as administrative, health, and fiscal measures (Round-9), to mitigate the repercussions on social, economic development, and people's livelihoods, which will be reflected in budget implementation.

The revenue performance of the BCG in the first 8 months of 2021 has accumulated the total of 13,849,459 Million Riels or equivalent to 67.47% of the 2021 budget law, while the revenue performance in the same period of 2020 has achieved only 59.41% of the 2020 budget law.

Grants  
611,412.8  
Million Riels  
**4.42%**

Others  
1,144,460.6  
Million Riels  
**8.26%**



Taxes  
12,093,586  
Million Riels  
**87.32%**  
**67.47%**  
compared to  
Budget Law 2021

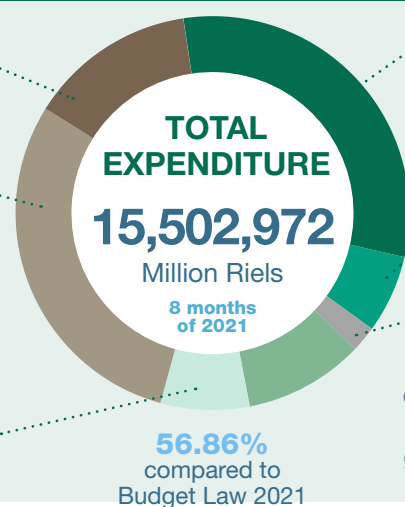
The expenditure performance of the BCG in the first 8 months of 2021 has accumulated the total of 15,502,972 Million Riels, or equivalent to 56.86% of the 2021 budget law. The pace of implementation is fairly similar to the same period of 2020.

Social benefits  
2,126,297.7 Million Riels  
**13.72%**

Net acquisition  
of nonfinancial assets  
4,593,698.6 Million Riels  
**29.63%**

Subsidies  
3155.1 Million Riels  
**0.02%**

Other expense  
1,133,295.6 Million Riels  
**7.31%**



Compensation of employees  
4,798,340.7 Million Riels  
**30.95%**

Use of goods & services  
992,973.7 Million Riels  
**6.41%**

Interest  
329,959.5 Million Riels  
**2.12%**

Grants  
1,525,251 Million Riels  
**9.84%**

**56.86%**  
compared to  
Budget Law 2021

## BCG RESULT IN AUGUST 2021

Net acquisition  
of financial assets  
67,794.2  
Million Riels

Net incurrence  
of liabilities  
1,721,306.7  
Million Riels

“ Amid the COVID-19 pandemic, the Royal Government of Cambodia has effectively managed and utilized the assets and liabilities in a timely manner. ”

# របាយការណ៍ស្ថិតិហិរញ្ញវត្ថុរដ្ឋាភិបាល ប្រចាំខែសីហា ឆ្នាំ២០២១



ព្រះរាជាណាចក្រកម្ពុជា  
ក្រសួងការបរទេស  
និងសហប្រតិបត្តិការអន្តរជាតិ  
ក្រុមការងារសម្របសម្រួល  
ការទូតសេដ្ឋកិច្ច

## ច្បាប់ហិរញ្ញវត្ថុឆ្នាំ២០២១

ចំណូល ២០ ៥២៦,៣៩៤  
១៧,០៧% នៃផ.ស.ស លានរៀល

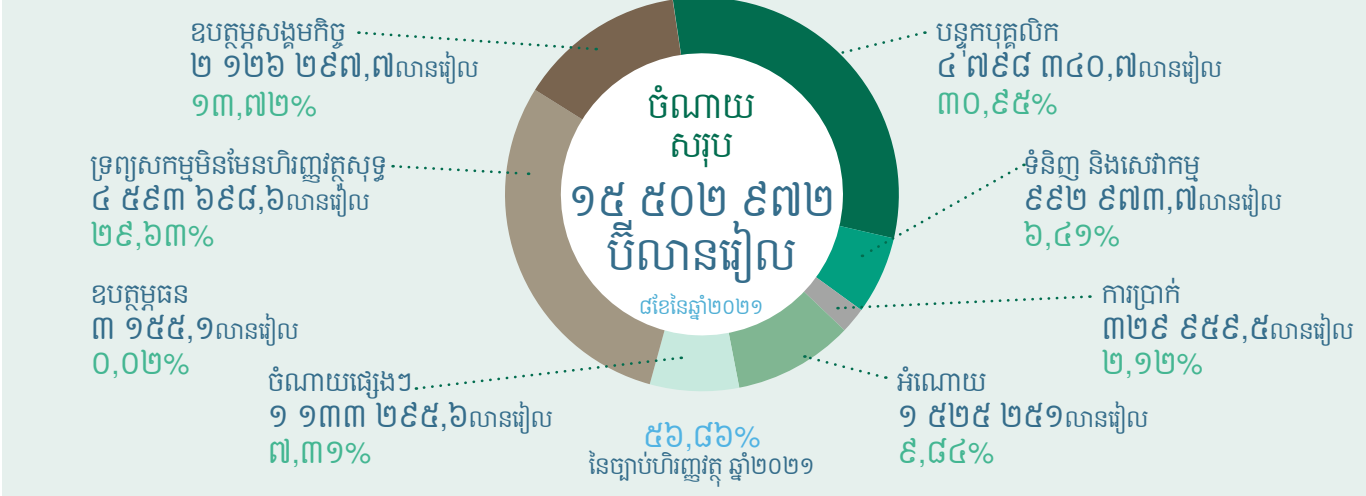
ចំណាយ ២៧ ២៦៥ ៨៩៨  
២៥,១១% នៃផ.ស.ស ប៊ីលានរៀល

ឆ្លើយតបទៅនឹងផលប៉ះពាល់ពីវិបត្តិអូសបន្លាយនៃជំងឺកូវីដ-១៩ ជាពិសេស ព្រឹត្តិការណ៍សហគមន៍ ២០កុម្ភៈ រាជរដ្ឋាភិបាលកម្ពុជាបានដាក់ចេញវិធានការ អន្តរាគមន៍ជាបន្តបន្ទាប់ ពោលគឺផែនការយុទ្ធសាស្ត្រយុទ្ធនាការជាតិចាក់វ៉ាក់សាំង បង្ការជំងឺកូវីដ-១៩ សំដៅបង្កើតឱ្យបាននូវភាពស្ងៀមស្ងួតសេដ្ឋកិច្ចនៅកម្ពុជា ក្នុង ឆ្នាំ២០២១ វិធានការរដ្ឋបាល និងសុខាភិបាល អនុវត្ត ៣ការពារ និងពាក់ រឹង វិធានការសារពើពន្ធ (ជុំទី៩) ជាដើម ដើម្បីពង្រឹងភាពធន់នឹងស្ថានភាពវិបត្តិ ដែល បានឆ្លុះបញ្ចាំងតាមរយៈលទ្ធផលនៃការអនុវត្តថវិកាដូចខាងក្រោម៖

ការអនុវត្តចំណូលថ្នាក់ជាតិ ក្នុងរយៈពេល ៨ខែ នៃឆ្នាំ២០២១ សម្រេចបានតាមផែនការគ្រោង ពោលគឺសម្រេចបាន ១៣ ៨៤៩ ៤៥៩ លានរៀល ឬស្មើនឹង ៦៧,៤៧% នៃច្បាប់ហិរញ្ញវត្ថុ ឆ្នាំ២០២១ ខណៈដែលការអនុវត្តក្នុងរយៈពេល ដូចគ្នា ឆ្នាំ២០២០ សម្រេចបានត្រឹម ៥៩,៤១% នៃច្បាប់ហិរញ្ញវត្ថុ ឆ្នាំ២០២១។



ការអនុវត្តចំណាយសរុបថ្នាក់ជាតិ ក្នុងរយៈពេល ៨ខែ នៃឆ្នាំ២០២១ សម្រេចបាន ១៥ ៥០២ ៩៧២ លានរៀល ស្មើនឹង ៥៦,៨៦% នៃច្បាប់ហិរញ្ញវត្ថុ ឆ្នាំ២០២១ ដែលល្បឿននៃការអនុវត្តនេះ ប្រហាក់ប្រហែលនឹងការអនុវត្តនៅឆ្នាំមុន។



“ ក្នុងបរិការណ៍ជំងឺកូវីដ-១៩ រាជរដ្ឋាភិបាល បានប្រយ័ត្នប្រយែង ខ្ពស់ក្នុងការគ្រប់គ្រង និងប្រើប្រាស់ទ្រព្យសកម្ម និងទ្រព្យអកម្ម ប្រកបដោយប្រសិទ្ធភាពបំផុត និងផ្តល់លទ្ធភាពគ្រប់គ្រាន់ ឆ្លើយតបទៅនឹងតម្រូវការនៃការអនុវត្តថវិកាបានទាន់ពេល វេលា។ ”

ការអនុវត្តថវិការដ្ឋ ក្នុងខែសីហា ឆ្នាំ២០២១  
ទ្រព្យហិរញ្ញវត្ថុសុទ្ធក្នុងប្រទេស ៦៧ ៧៩៤,២ លានរៀល  
ចំណូលសុទ្ធត្រូវប្រទេស ១ ៧២១ ៣០៦,៧ លានរៀល

ប្រភព៖ របាយការណ៍ស្ថិតិហិរញ្ញវត្ថុរដ្ឋាភិបាល ប្រចាំខែសីហា ឆ្នាំ២០២១ / ក្រសួងការបរទេស និងសហប្រតិបត្តិការអន្តរជាតិ

ក្រុមការងារសម្របសម្រួលរបាយការណ៍ស្ថិតិហិរញ្ញវត្ថុរដ្ឋាភិបាល ប្រចាំខែសីហា ឆ្នាំ២០២១ - របាយការណ៍ស្ថិតិហិរញ្ញវត្ថុរដ្ឋាភិបាល ប្រចាំខែសីហា ឆ្នាំ២០២១

# State Budget Implementation

## August 2021



In response to the protracted impact of the Covid-19, specifically the 20 February community event, the Royal Government of Cambodia has promptly initiated a series of intervention including administrative, health, and fiscal measures to mitigate the repercussion on social, economic development, and people’s livelihood. Numerous fiscal measures (Round-9), include proactive targeted spending and cost efficiency for budgetary central government expenditure, and a post-lockdown cash social assistance program (targeted specifically on poor family and vulnerable groups).

### BUDGET LAW 2021 (Projected)

<b>REVENUE</b> 17.07% of GDP	19,927.19 Billion Riels
<b>EXPENDITURE</b> 25.11% of GDP	29,306.15 Billion Riels



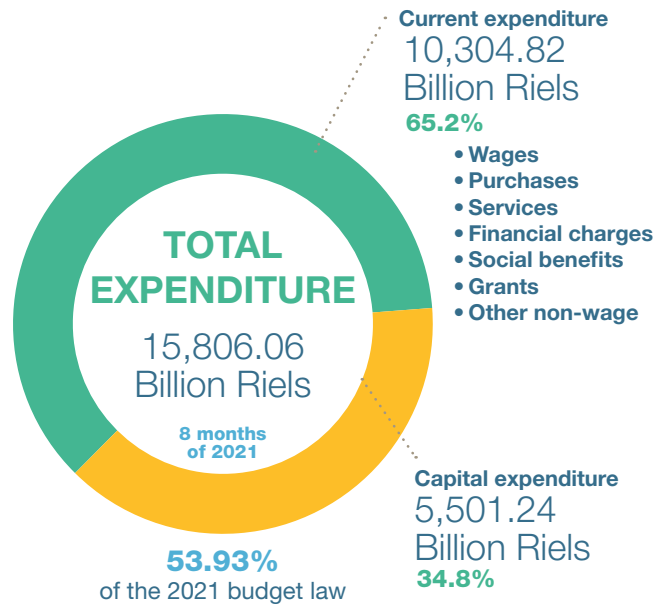
**67.44%**  
of the 2021 budget law

**Tax revenue**  
12,345.13  
Billion Riels  
**91.86%**

**Non tax revenue**  
1,060.37  
Billion Riels  
**7.89%**

**Capital revenue**  
33.32  
Billion Riels  
**0.25%**

The expenditure performance of the BCG within the first 8 months was slightly lower than planned, reaching 53.93% of the 2021 budget law, similar to the rate from last year. The expenditure implementation in 2021 is at a manageable pace as the RGC minimizes unnecessary expenditures and shifts the priority to further combat the consequences of the Covid-19 pandemic.



**53.93%**  
of the 2021 budget law

**Current expenditure**  
10,304.82  
Billion Riels  
**65.2%**

**Capital expenditure**  
5,501.24  
Billion Riels  
**34.8%**

The domestic revenue performance of BCG within the first 8 months of 2021 reached 67.44% of the 2021 budget law, an increase of 9.94% compared to the 2020 budget law. Despite the prolongation of the Covid-19 pandemic, particularly the 20 February community event, the 2021 revenue collection target remains sustainable.



In the first 8 months of 2021, the implementation of BCG financing has reached KHR 2,367.24 billion, or 25.24% of the budget law, while government deposit is at KHR 131.78 billion (-18.83%). Moreover, the current account has a total surplus of KHR 3,100.67 billion, or equivalent to 137.25% of the budget law, while the overall balance has a total deficit of KHR 2,367.24 billion.



# ការអនុវត្តថវិការដ្ឋ ប្រចាំខែសីហា ឆ្នាំ២០២១

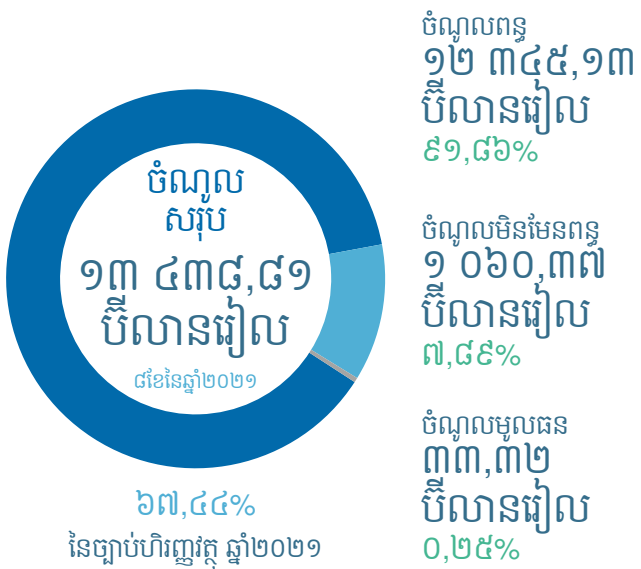


ព្រះរាជាណាចក្រកម្ពុជា  
ក្រសួងការបរទេស  
និងសហប្រតិបត្តិការអន្តរជាតិ  
ក្រុមការងារសម្របសម្រួល  
ការទូតសេដ្ឋកិច្ច

ឆ្លើយតបទៅនឹងផលប៉ះពាល់ពីវិបត្តិអូសបន្លាយនៃជំងឺកូវីដ-១៩ ជាពិសេស ព្រឹត្តិការណ៍សហគមន៍ ២០ កុម្មៈ រាជរដ្ឋាភិបាល បានដាក់ចេញវិធានការអន្តរាគមន៍ រួមមានផែនការយុទ្ធសាស្ត្រយុទ្ធនាការជាតិចាក់វ៉ាក់សាំងបង្ការជំងឺកូវីដ-១៩ វិធានការរដ្ឋបាល និងសុខាភិបាល និងវិធានការគោលនយោបាយសារពើពន្ធ ដើម្បីពង្រឹងភាពធន។ រាជរដ្ឋាភិបាលបានបន្តអនុវត្តវិធានការសារពើពន្ធ (ជុំទី៩) ការធ្វើវិចារណកម្មចំណាយ និងពង្រឹងប្រសិទ្ធភាពចំណាយថវិកាជាតិ និងដាក់ ឲ្យអនុវត្តកម្មវិធីជំនួយសង្គមជាសាច់ប្រាក់ ជាពិសេសគ្រួសារក្រីក្រ និងក្រុម ងាយរងគ្រោះ ក្រោយពេលបិទខ្ទប់។

## ច្បាប់ហិរញ្ញវត្ថុឆ្នាំ២០២១ (គ្រោង)

ចំណូល	១៩ ៩២៧,១៩
១៧,០៧% នៃផ.ស.ស	បីលានរៀល
ចំណាយ	២៩ ៣០៦,១៥
២៥,១១% នៃផ.ស.ស	បីលានរៀល



ការអនុវត្តចំណាយសរុបថ្នាក់ជាតិក្នុងរយៈពេល ៨ខែ ដំបូងនៃឆ្នាំ២០២១ សម្រេចបានទាបជាងផែនការគ្រោង បន្តិច ស្មើនឹង ៥៣,៩៣% នៃច្បាប់ហិរញ្ញវត្ថុ ឆ្នាំ២០២១ ប្រហាក់ប្រហែលនឹងការអនុវត្តឆ្នាំ២០២០។ ការអនុវត្ត ចំណាយឆ្នាំ២០២១ ស្ថិតក្នុងកម្រិតមួយដែលអាចគ្រប់គ្រង បានដោយមានការរឹតបន្តឹងចំណាយមិនចាំបាច់ និងការ បង្វែរមុខសញ្ញាអនុវត្តឲ្យចំគោលដៅប្រកបដោយបុរសកម្ម ដើម្បីដោះស្រាយផលប៉ះពាល់នៃវិបត្តិជំងឺកូវីដ-១៩ ឲ្យទាន់ ពេលវេលា។



ការអនុវត្តចំណូលក្នុងប្រទេសសរុបថ្នាក់ជាតិក្នុង រយៈពេល ៨ខែ នៃឆ្នាំ២០២១ សម្រេចបានតាមផែនការ គ្រោង ស្មើនឹង ៦៧,៤៤% នៃច្បាប់ហិរញ្ញវត្ថុ ឆ្នាំ២០២១ កើនឡើង ៩,៩៤% ធៀបនឹងច្បាប់ហិរញ្ញវត្ថុ ឆ្នាំ២០២០។ ហើយទោះបីព្រឹត្តិការណ៍សហគមន៍ ២០ កុម្មៈ បន្តអូសបន្លាយ និងដាក់សម្ពាធដល់ការប្រមូលចំណូលថវិកាជាតិក្នុង ឆ្នាំ២០២១ក្តី ក៏ការប្រមូលចំណូលនៅបន្តរក្សាបាននូវ ខណៈភាព។

“ ការអនុវត្តហិរញ្ញប្បទានសរុបក្នុងរយៈពេល ៨ខែនៃឆ្នាំ២០២១ សម្រេចបាន ២ ៣៦៧,២៤ បីលានរៀល ឬស្មើនឹង ២៥,២៤% នៃច្បាប់ហិរញ្ញវត្ថុ ឆ្នាំ២០២១ ខណៈប្រាក់បញ្ញើរដ្ឋាភិបាលមានចំនួន ១៣១,៧៨ បីលានរៀល (-១៨,៨៣%)។ តុល្យភាពចរន្ត មានអតិរេក ៣ ១០០,៦៧ បីលានរៀល ឬស្មើនឹង ១៣៧,២៥% នៃច្បាប់ហិរញ្ញវត្ថុ ឆ្នាំ២០២១ និងតុល្យភាព សរុប មានឱនភាពប្រមាណ ២ ៣៦៧,២៤ បីលានរៀល។ ”

ប្រភព៖ ការអនុវត្តថវិការដ្ឋ ប្រចាំខែសីហា ឆ្នាំ២០២១ / ក្រសួងសេដ្ឋកិច្ច និងហិរញ្ញវត្ថុ

ក្រុមការងារសម្របសម្រួលការទូតសេដ្ឋកិច្ច - ការអនុវត្តថវិការដ្ឋប្រចាំខែសីហា ឆ្នាំ២០២១ - របៀបវារៈខេត្តកោះកុង ឆ្នាំ២០២១

# Public Debt Management

Data as of S1 2021

• A-DSA Indicators • Borrowing, Disbursement, Debt Service Payment and Outstanding • Outstanding by Creditor: Bilateral and Multilateral



Kingdom of Cambodia  
Ministry of Foreign Affairs  
and International Cooperation

Economic Diplomacy  
Coordinating Group

## A-DSA Indicators (Percentage)

Indicator	Threshold	2019	2020	2021e
<b>Present Value of Total Public Debt</b>				
To GDP	55	20.8	24.0	25.1
<b>Present Value of Public and Publicly Guaranteed External Debt</b>				
To GDP	40	20.8	24.0	25.1
To Exports	180	26.7	32.8	37.1
<b>Public and Publicly Guaranteed External Debt Service</b>				
To Exports	15	1.5	1.8	2.0
To Revenue	18	4.5	6.3	6.2

The preliminary result of the **Debt Sustainability Analysis (DSA)** shows that despite the Cambodian economy being impacted by the spread of Covid-19, Cambodia's public debt situation continues to remain **"sustainable"** and **"low risk"** of debt distress.

\*\*\* DSA : Debt Sustainability Analysis

The thresholds are defined by the IMF and World Bank for the medium policy countries.

The thresholds and the debt indicators for 2018 are revised follow the new Debt Sustainability Framework (DSF) on 1<sup>st</sup> July 2018.

All the figures here are based on DSA exercise which is done by MEF.

## Borrowing, Disbursement, Debt Service Payment, and Outstanding (Unit: USD Million)

Year	Borrowing		Disbursement		Debt Service Payment		Outstanding**	
	Domestic	External	Domestic	External	Domestic	External*	Domestic	External
2019	-	1,288.27	-	829.74	1.22	308.79	1.57	7,596.67
2020	-	2,022.46	-	1,213.37	1.61	358.68	-	8,810.42
S1 2021	-	-	-	545.96	-	197.40	-	9,122.12
Accu. as of	<b>19.89</b>	<b>14,836.52</b>	<b>19.89</b>	<b>10,050.96</b>	<b>23.01</b>	<b>2,267.76</b>	-	<b>9,122.12</b>
30 June 2021	0.13%	99.87%	0.20%	99.80%	1.00%	99.00%	0.00%	100.00%

\* Rescheduled old debts are included in the Debt Service Payment.

\*\* Old debts (rescheduled and under negotiation) are included in the Outstanding.

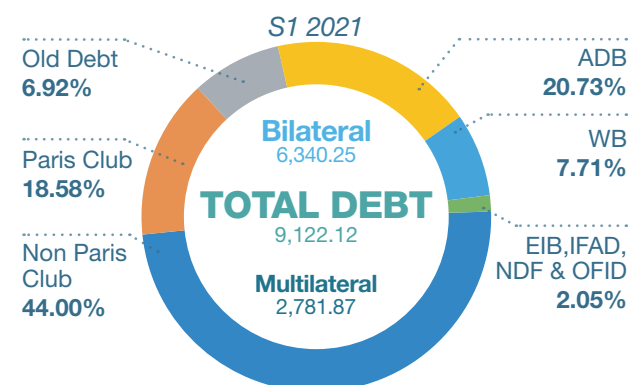
Accumulatively, from 1993 to 30 June 2021, the Royal Government of Cambodia (RGC) has signed concessional loan agreements with **Development Partners (DPs)** accounted for **USD 14.84 billion**, in which **84%** and **16%** covered infrastructure and other priority sectors, respectively.

## Outstanding by Creditor

(Unit: USD Million)

### I. Bilateral

Country	2019	2020	S1 2021
<b>1. Paris Club</b>	<b>1,124.13</b>	<b>1,457.03</b>	<b>1,695.26</b>
France	327.23	409.87	397.71
Japan	411.29	578.33	832.73
R.O.K	385.60	468.83	464.82
<b>2. Non-Paris Club</b>	<b>3,709.89</b>	<b>3,992.58</b>	<b>4,013.41</b>
China	3,606.72	3,901.45	3,929.10
India	30.23	23.52	20.16
Thailand	54.42	50.96	48.53
Vietnam	18.52	16.65	15.61
<b>3. Old Debt</b>	<b>631.68</b>	<b>632.24</b>	<b>631.59</b>
Rescheduled	11.64	12.19	11.54
Under Negotiation	620.05	620.05	620.05
<b>Total</b>	<b>5,465.70</b>	<b>6,081.85</b>	<b>6,340.25</b>



### II. Multilateral

Multilateral	2019	2020	S1 2021
ADB	1,431.14	1,856.33	1,890.98
EIB	-	54.32	52.71
WB	586.00	686.32	703.66
IFAD	73.84	94.74	99.80
NDF	9.18	9.82	9.42
OFID	30.81	27.05	25.29
<b>Total</b>	<b>2,130.97</b>	<b>2,728.58</b>	<b>2,781.87</b>





G

# Socio-Economic Trends



## ផែនការស្តារសេដ្ឋកិច្ច (២០២១-២០២៣)

### មានគោលដៅ៖

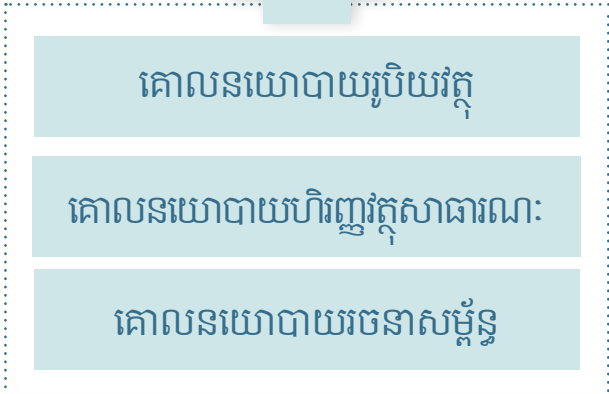
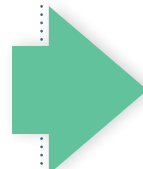
ទាញសេដ្ឋកិច្ចឱ្យត្រឡប់ទៅរកវិថីនៃកំណើនឡើងវិញ  
ប្រកបដោយចីរភាព និងបរិយាប័ន្ន

ដោយផ្អែកលើអភិក្រម ៣ សំខាន់ៗ៖

**១** ការរក្សាលំនឹង  
និងការស្តារឡើងវិញ  
នូវសង្គម-សេដ្ឋកិច្ច

**២** ការកែទម្រង់៖ ពិពិធកម្ម  
និងភាពប្រកួតប្រជែង

**៣** ការកសាងភាពធន់៖  
បរិយាប័ន្ន និងចីរភាព



# Socio-Economic Trends

## 8 Months of 2021



Kingdom of Cambodia  
Ministry of Foreign Affairs  
and International Cooperation

Economic Diplomacy  
Coordinating Group

The global economy in 2020 is estimated to have a negative growth of **3.5%**, due to the negative impacts of Covid-19 on trade, investments and tourism sectors. Meanwhile, Cambodia's economy is still under threat of the pandemic. The amount of international tourists, garment exports, activities in the construction sector and foreign investment had declined in 2020. However, other exporting products especially bicycles, electronics assembly, wooden products, gold and agricultural products have continued to increase as the government has been implementing intervention measures to help stabilize the lives of the people and businesses during the Covid-19 pandemic, as well as for the recovery plans after the crisis.

### TRADE

#### Export

**-1.1%**

14 204 million dollars  
(43.1% of GDP)

Due to the negative growth of garment exports by 9.9%



#### Import

**-6.1%**

18 939 million dollars  
(70.8% of GDP)

Due to the sharp decline of major import items including fabrics, gasoline, construction materials and automobiles.

### TOURISM



#### International Tourist Arrivals

**-80.2%**

1,306 thousand tourists

Due to travel restrictions.

### CONSTRUCTION



**4,841**

Projects

**48↑**

**8,753**

Million USD

**32.1%↓**

Due to the increase of the construction projects on housing.

### INVESTMENT



#### Total Investment Projects

**154**

Projects

**43↓**

which has created approximately 120,731 new jobs (declined by 49.8%)

#### Investment in Industrial Sectors

**131**

Projects

**19.61%↓**

Due to decline in investment projects on bags (25 projects) and garments (6 projects)

### CONSUMER PRICE INDEX

#### In Phnom Penh

**2.9%**

(higher than in 2019, 1.9%)

Due to the high increase of food and non-alcoholic beverages with the rate of 4.5%, while the same period in 2019 was 2%.

### COMMODITY PRICE (DECEMBER 2020)

#### Cambodian Market



Gasoline

**3,075**

Riel/Liter

**5.13%↑**



Diesel

**2,800**

Riel/Liter

**8.74%↑**

#### International Market



Crude Oil (Brent)

**49.87**

USD/Barrel

**15.36%↑**



Crude Oil (WTI)

**47.05**

USD/Barrel

**14.48%↑**

\*\* Changes in Commodity Price are compared to previous month. \*\* Other changes in percentage are compared to last year period.

# CAMBODIA'S Macroeconomic Situation

(Projection based on mid-year assessment by June 2020)

• Summary • Industry Sector • Service Sector



Kingdom of Cambodia  
Ministry of Foreign Affairs  
and International Cooperation

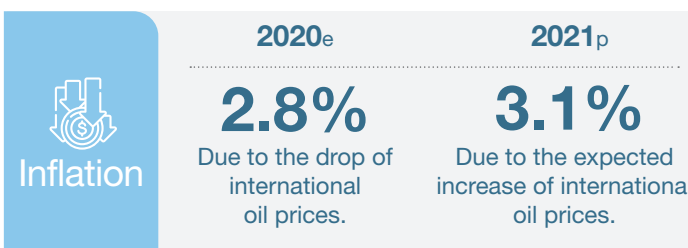
Economic Diplomacy  
Coordinating Group

## Summary

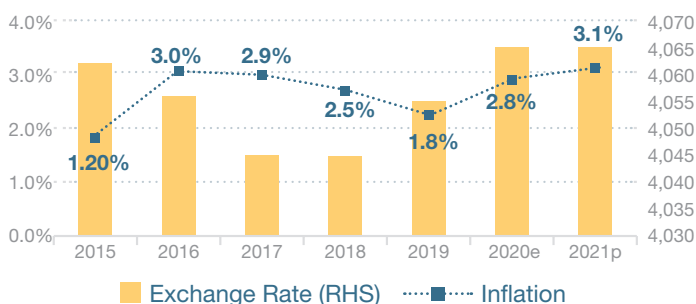


GDP and Sectoral Growth 2017-2021 (%)

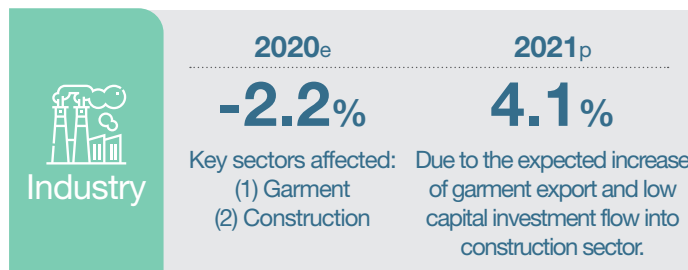
Sector	2017	2018	2019	2020e	2021p
<b>GDP</b>	<b>7.0</b>	<b>7.5</b>	<b>7.1</b>	<b>-1.9</b>	<b>3.5</b>
<b>Agriculture</b>	<b>1.7</b>	<b>1.1</b>	<b>-0.5</b>	<b>0.9</b>	<b>1.6</b>
Crops	2.2	1.3	0.6	0.8	1.8
Others	1.2	0.9	-1.9	0.9	1.3
<b>Industry</b>	<b>9.7</b>	<b>11.6</b>	<b>11.3</b>	<b>-2.2</b>	<b>4.1</b>
Garment	5.8	9.6	6.6	-6.7	1.6
Construction	18.0	17.5	20.8	-5.3	3.3
Others	10.3	9.2	10.3	13.1	10.1
<b>Service</b>	<b>7.0</b>	<b>6.8</b>	<b>6.2</b>	<b>-3.0</b>	<b>3.6</b>
Hotel & Restaurant	5.9	5.5	3.1	-9.7	3.8
Wholesale & Retail Trade	6.5	6.2	6.5	-4.0	2.0
Transportation & Communication	8.0	8.0	8.4	0.4	5.9
<b>Real Estate &amp; Business</b>	<b>8.7</b>	<b>8.5</b>	<b>7.0</b>	<b>-5.1</b>	<b>2.6</b>



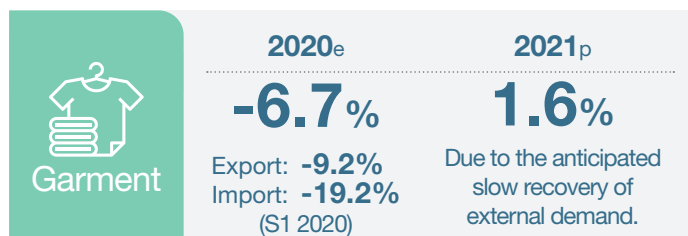
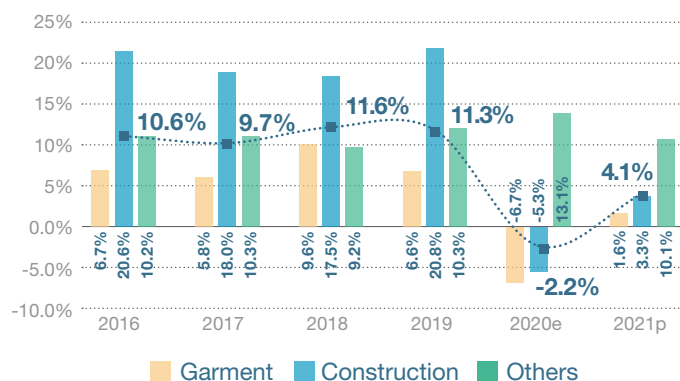
Inflation Rate 2015-2021



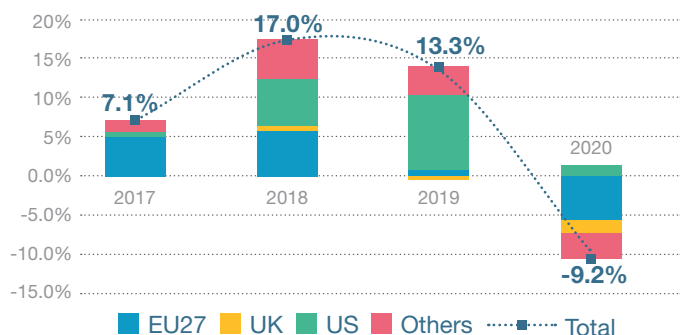
## Industry Sector



Growth of Industry Sector and Its Sub Sector 2016-2021



6-Month Contribution to Growth of Garment Export



- **Challenges:** Cambodia will face stronger market competition due to (1) the containment of the COVID-19 pandemic, (2) impacts of EBA withdrawal, (3) Vietnam-EU FTA, and (4) lower growth in labor productivity.
- **Solutions:** The government will continue to (1) increase productivity, (2) reduce electricity, transportation and logistics cost, and (3) promote trade facilitation.

# CAMBODIA'S Macroeconomic Situation

(Projection based on mid-year assessment by June 2020)

• Summary • Industry Sector • Service Sector



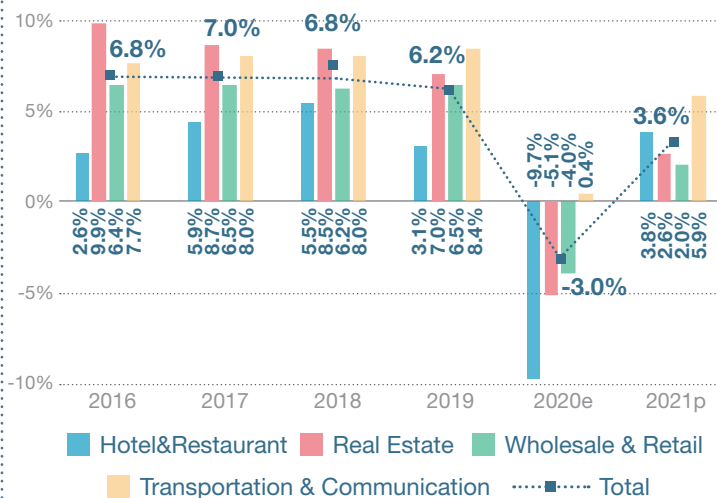
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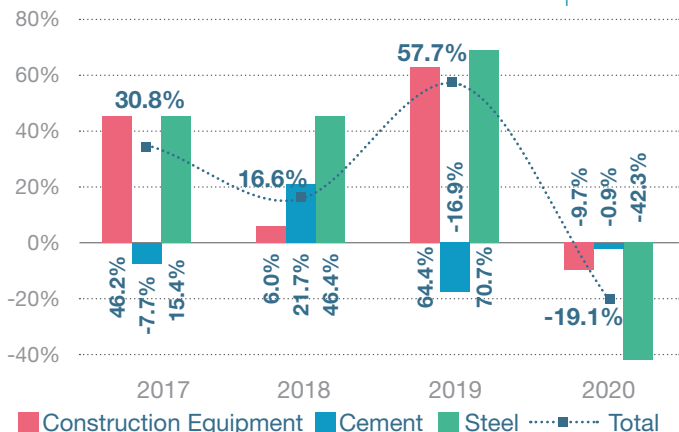
## Construction

<b>2020<sub>e</sub></b>	<b>2021<sub>p</sub></b>
<b>-5.3%</b>	<b>3.3%</b>
Due to the decline of (1) foreign capital inflow from China, (2) demand for buildings to serve tourism and commerce activities and (3) investment confidence due to COVID-19.	Due to the expected shrink in investment capital inflow.

Growth of Services Sector and Its Sub Sector 2016-2021



6-Month Construction Material Import



## Hotel & Restaurant

<b>2020<sub>e</sub></b>	<b>2021<sub>p</sub></b>
<b>-9.7%</b>	<b>3.8%</b>
Due to travel restriction and the decline of tourists' travelling confidence.	Although, domestic tourism is expected to recover faster than international tourism, it may still take up to 5 years to rebound to its pre COVID-19 trend.

## Real Estate

<b>2020<sub>e</sub></b>	<b>2021<sub>p</sub></b>
<b>-5.1%</b>	<b>2.6%</b>
Sectors affected: (1) high-end residential and office space, and (2) retail mall.	Due to the expected increase of capital investment inflow and economic activities that drive real estate.

## Wholesale & Retail

<b>2020<sub>e</sub></b>	<b>2021<sub>p</sub></b>
<b>-4.0%</b>	<b>2.0%</b>
Sectors affected: (1) construction, (2) real estate, and (3) hotel and restaurant. Import decreased due to (1) low consumer spending due to wage decrease and unemployment, and (2) supply chain disruptions due to strict border control.	Due to the expected slow bounce back in business activities and income factor after COVID-19.

## Transport & Communication

<b>2020<sub>e</sub></b>	<b>2021<sub>p</sub></b>
<b>0.4%</b>	<b>5.9%</b>
Sectors affected: (1) construction, (2) garment, and (3) tourism despite an expected increase of telecommunication sector due to the rise of internet usage during the pandemic period.	Due to the expected recovery of economic activities and continuous investment in infrastructure especially in telecommunication sector.

## Others

<b>2020<sub>e</sub></b>	<b>2021<sub>p</sub></b>
<b>13.1%</b>	<b>10.0%</b>
Due to the rise in the value of exports of electrical part, bicycle, plywood and rice.	Due to (1) the increase of investment within and outside special economic zones (SEZs), (2) the expected relocation of factories to Cambodia from the effect of trade war and (3) the shift from global supply chains to the regional supply chains in the context of COVID-19.

## Service Sector

## Service

<b>2020<sub>e</sub></b>	<b>2021<sub>p</sub></b>
<b>-3.0%</b>	<b>3.6%</b>
Due to the sharp decline in (1) hotel and restaurant, (2) real estate, and (3) wholesale, and retail trade.	Due to the expected increase of international and domestic tourists, domestic consumptions and other supporting sectors.