



ក្រសួងការបរទេស
និងសហប្រតិបត្តិការអន្តរជាតិ
Ministry of Foreign Affairs
and International Cooperation

ផ្ទាំងព័ត៌មាន DASHBOARD

រៀបចំ និងចេញផ្សាយដោយ៖
ក្រុមការងារសម្របសម្រួលការទូតសេដ្ឋកិច្ច

Prepared by:
Economic Diplomacy Coordinating Group

10.June.2021

CONTACT:

economic.diplomacy@mfaic.gov.kh

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

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About Cambodia

Final Census Results 3-13 March 2019

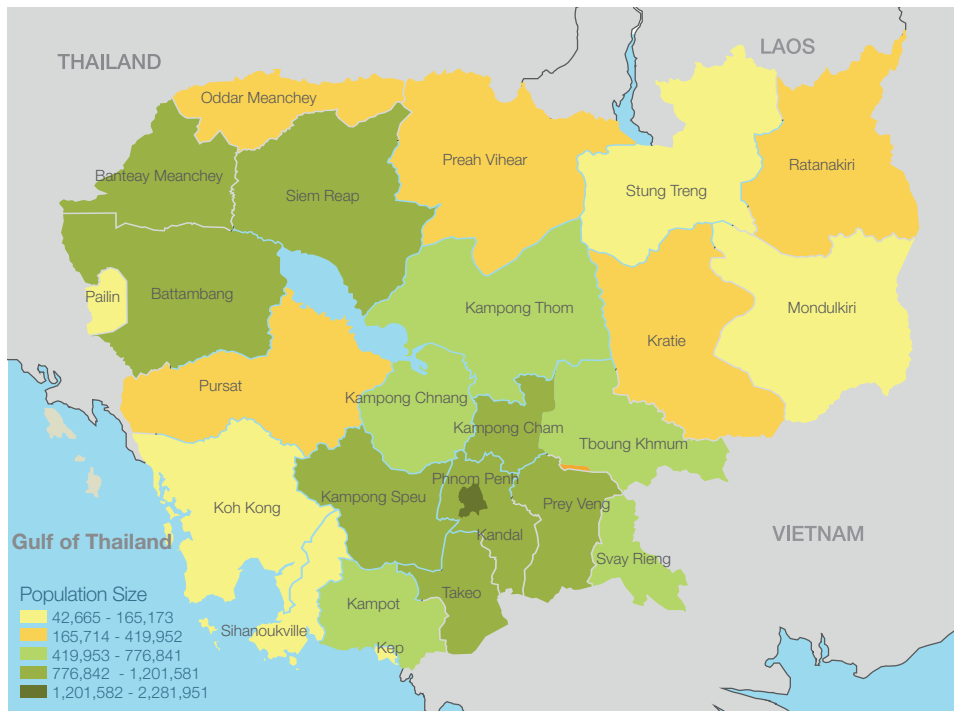
• Living in Cambodia • Demographic



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Living in Cambodia



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

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.

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

Trade 2020

• International Trade by Country • Imports • Exports



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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%
Total	14,748.74	20,171.81	34,920.55	17,215.37	18,590.48	35,805.85	16.72%	-7.84%	2.54%

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%
Total	20,171.81	18,590.48	-7.84%

Export

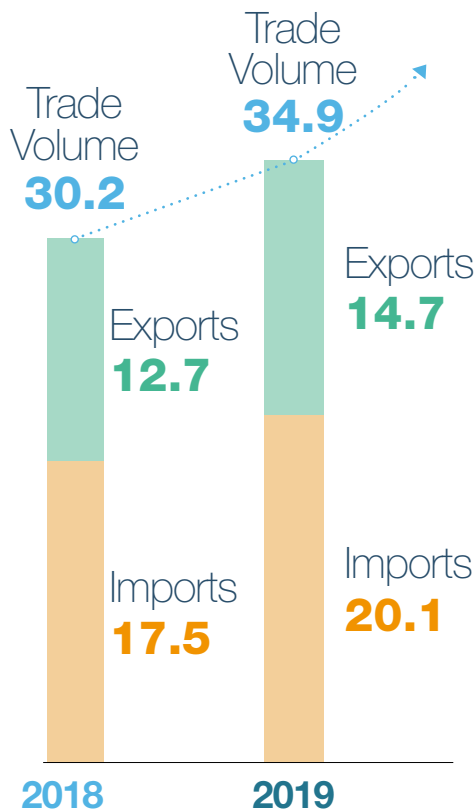
Export	2019	2020	Change
Clothing	8,266.35	7,420.28	-10.24%
Footwear	1,264.62	1,116.73	-11.69%
Travel Accessories	1,078.89	964.70	-10.58%
Machinery & Electrical Equipment	574.44	755.34	31.49%
Bike	412.49	527.08	27.78%
Rice	420.13	468.58	11.53%
Furniture & Lighting Equipment	419.48	631.88	50.63%
Unvulcanized 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%
Total	14,748.74	17,215.37	16.72%

Trade Trends 2019



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)

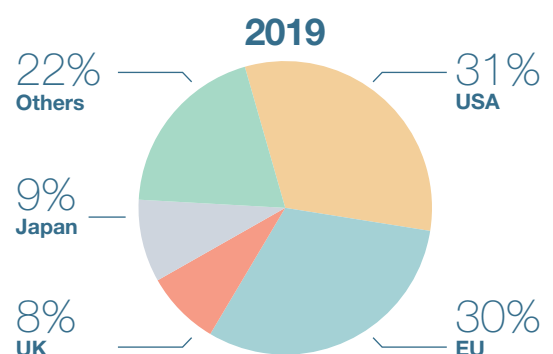
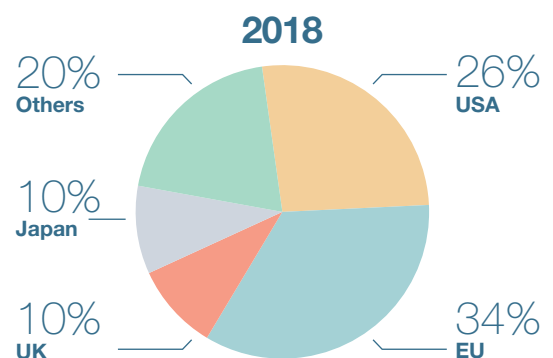
** (including electrical harness and decorative lighting)

*** (Thousand M³)

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 Trends 2019



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 ↑
Total	17,255.8	20,147.5	+16.8%	12,625.9	14,738.9	+16.7%	-4,629.9 ↓	-5,408.6 ↓

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 ↓
Total	12,625.9	14,738.9	+16.7%	17,255.8	20,147.5	+16.8%	-4,629.9 ↓	-5,408.6 ↓

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
ASEAN	2,133.09	4,756.99	4,384.53
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
Other Asia	4,191.82	4,040.26	1,962.28
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	-	-	-
Middle East	-	-	-
UAE	-	-	-
America	58.09	560.20	1,795.90
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
Pacific Islands	43.03	-	-
Samoa	43.03	-	-
Marshall Island	-	-	-
Europe	23.09	40.13	107.26
U.K	14.71	26.31	105.24
Netherlands	2.31	7.28	-
France	6.07	6.54	-
Sweden	-	-	-
Italy	-	-	2.02
Oceania	2.40	-	0.83
Australia	2.40	-	-
New Zealand	-	-	0.83
Africa	-	-	-
Maurice	-	-	-
Seychelles	-	-	-
Total	6,451.52	9,397.58	8,250.80
Δ%	2%	46%	-12%

Million USD

Investment Trends by Sector

Sector	Total	2016	2017	2018	2019	2020
Tourism	12,125.23	1,398.23	3,166.56	1,508.81	6,051.62	3,850.51
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
Energy	1,992.7	12.50	-	58.23	158.60	1,763.37
Energy	1,763.05	-	-	-	71.26	1691.79
Solar	209.02	12.50	-	58.23	87.34	50.95
Photovoltaic	20.62	-	-	-	-	20.62
Industry	6,497.49	1,347.47	1,814.52	1,256.04	2,079.46	1,692.56
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
Total	25,790.30	3,609.65	6,331.14	6,451.54	9,397.98	8,250.80

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

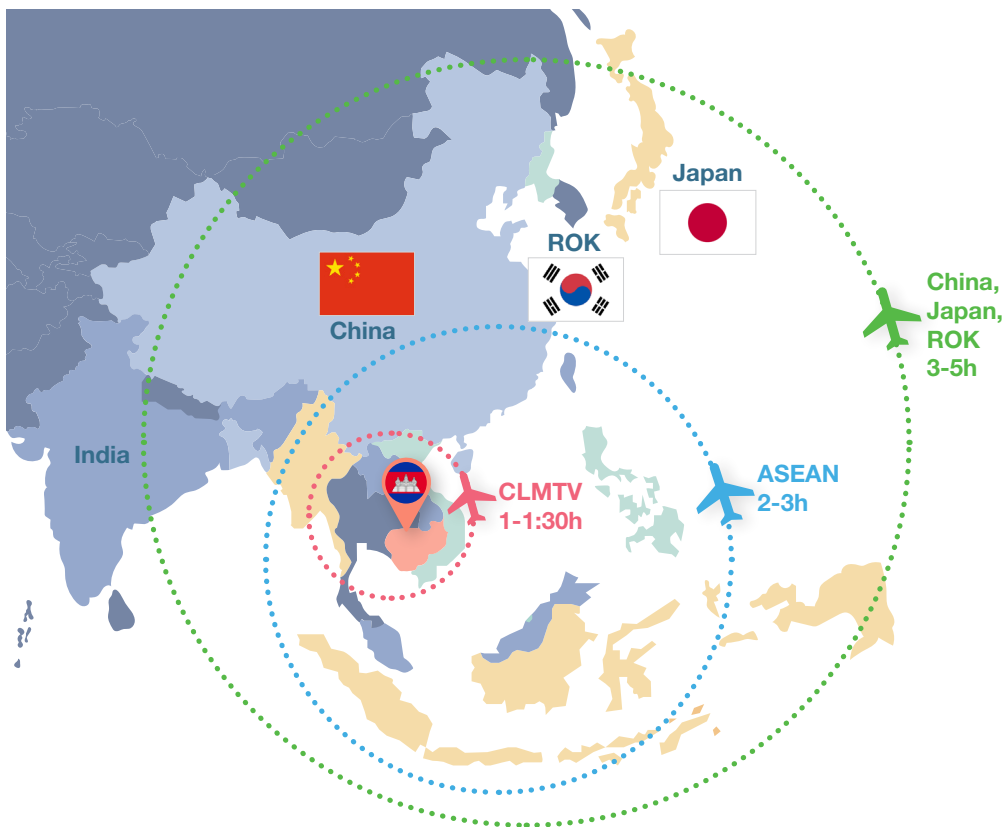


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Geographical Advantages

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



CLMVTV (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:

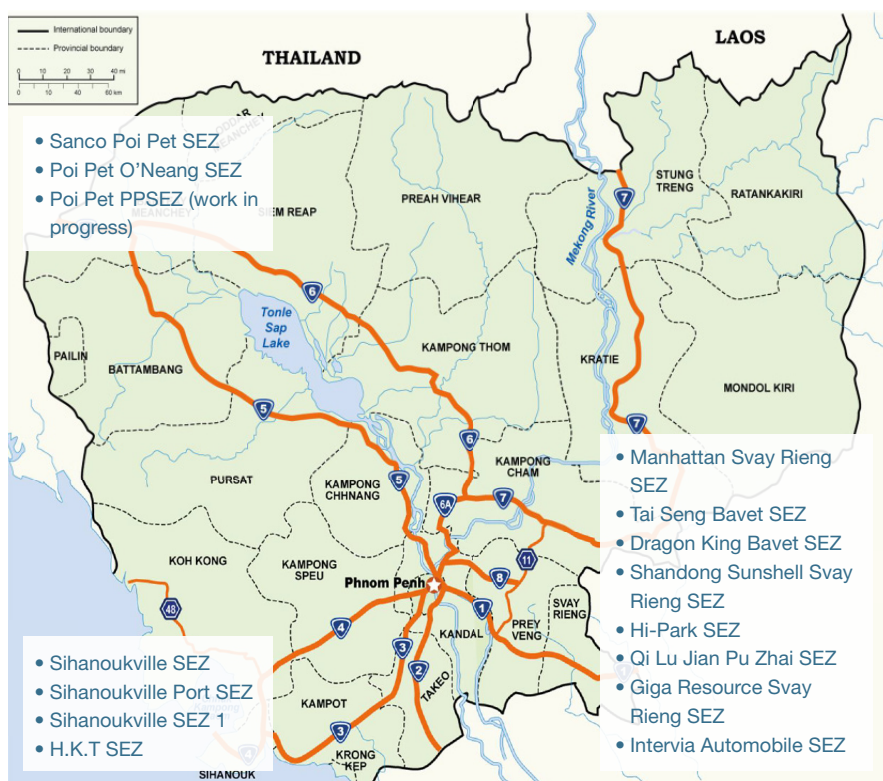
- Custom duty 0% for agriculture inputs and machineries
- One Stop Service for rice export, exemption of VAT for inputs using paddy rice
- Exemption of VAT for fertilizer, seeds, pesticides, animal feed, animal breeds, and agricultural machineries (prakas #312 MEF dated March 19, 2014)

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 2nd 2019
and letter No.3725 MEF)

www.cambodiainvestment.gov.kh

Opportunities in the provinces along Thai border

Province	Population	Land size m ²
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
Cnhak 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%
Total	24,375.62	27,047.65	30,368.96	34,029.37	100%

Investment by Sectors (Stock)

Industry	2016	2017	2018	2019	Share %
1 Agriculture	3,224.69	3,458.51	3,689.30	3,901.84	11.47%
2 Mining & quarrying	234.25	253.31	272.88	289.73	0.85%
3 Total Manufacturing	5,837.17	6,193.50	6,614.93	7,247.57	21.30%
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%
4 Financial Activities	3,547.07	4,382.36	5,548.26	6,726.48	19.77%
5 Accomodation	2,532.84	2,851.18	3,295.68	3,809.16	11.19%
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%
6 Telecom	620.32	640.92	661.52	682.12	2.00%
7 Construction	455.31	562.70	804.43	1,054.26	3.10%
8 Hydropower	2,298.14	2,312.83	2,327.51	2,342.19	6.88%
9 Real Estate	3,112.88	3,480.68	3,844.80	4,283.52	12.59%
10 Other	2,513.90	2,912.60	3,310.61	3,693.44	10.85%
Total	24,376.56	27,048.59	30,369.90	34,030.31	100%

Foreign Direct Investment

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



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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%
Total	2,476	2,788	3,212.63	3,706.03	100%

Investment by Sectors (Flow)

Industry	2016	2017	2018	2019	Share %
1 Agriculture	236.64	233.82	230.80	212.54	5.73%
2 Mining & quarrying	22.47	19.06	19.56	16.85	0.45%
3 Total Manufacturing	490.24	356.33	421.43	632.65	17.07%
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%
4 Financial Activities	645.54	951.35	1,057.21	1,223.85	33.02%
5 Accomodation	253.96	318.33	444.50	513.49	13.86%
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%
6 Telecom	16.09	20.60	20.60	20.60	0.56%
7 Construction	77.30	107.39	241.73	249.83	6.74%
8 Hydropower	14.68	14.68	14.68	14.68	0.40%
9 Real Estate	313	368	364	438.72	11.84%
10 Other	406.12	398.70	398.01	382.83	10.33%
Total	2,475.92	2,788.08	3,212.63	3,706.03	100%

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.



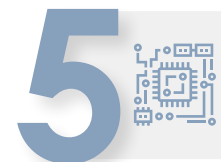
AGRO-INDUSTRIAL PRODUCTION

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

Tourism Q1 2021

- Int'l 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

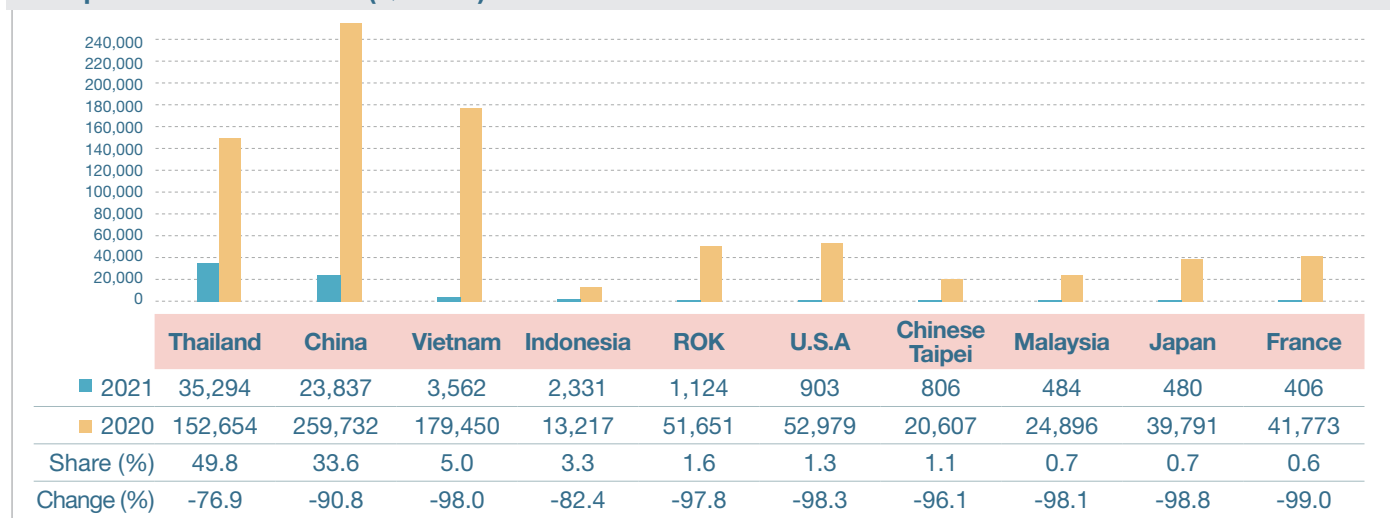
20/19 Change : -80.2%

Inbound Tourism

1. International tourist arrivals (Q1 2021)

Inbound Tourism	2019	2020	2021	Share (%)	Change (%)	
				2021	2020/2019	2021/2020
Air	1,299,122	663,641	33,535	47.3	-48.9	-94.9
• Phnom Penh Int'l Airport (PNH)	581,709	365,315	27,055	38.2	-37.2	-92.6
• Siem Reap Int'l Airport (REP)	583,879	240,785	2	0.0	-58.8	-100.0
• Kong Keng (KOS)	133,534	57,541	6,478	9.1	-56.9	-88.7
Land	512,309	440,096	37,366	52.7	-14.1	-91.5
Waterways	66,422	51,489	0	0	-22.5	-100.0
Total	1,877,853	1,155,226	70,901	100.0	-38.5	-93.9

2. Top ten markets arrivals (Q1 2021)



Outbound Tourism

Outbound Tourism	Q1 2019	Q1 2020	Q1 2021	Change (%)	
				2020/2019	2021/2020
Cambodian Outbound Tourists	456,876	308,350	5,509	-32.5	-98.2
International Tourists Departure	1,697,629	1,193,072	63,666	-29.7	-94.7

Internal Tourism

Internal Tourism	Q1 2020		Q1 2021		Change (%) 2021/2020	
	Khmer	Foreigner	Khmer	Foreigner	Khmer	Foreigner
Phnom Penh	592,379	771,563	374,196	66,419	-36.8	-91.4
Siem Reap Angkor	164,600	383,663	115,255	4,482	-30.0	-98.8
Coastal Zone	1,010,579	270,030	903,291	42,059	-10.6	-84.4
↳ Preah Sihanouk	244,269	161,750	532,380	35,438	117.9	-78.1
Eco-tourism Zone	162,023	20,547	139,345	2,143	-14.0	-89.6
Total	1,929,581	1,445,803	1,532,087	115,103	-20.6	-92.0

Tourism Supply 2020



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
Total	1,028	44,428	35,551	2,755	35,791	10,927	3,359	185,258	33,661

Tourist Attractions

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



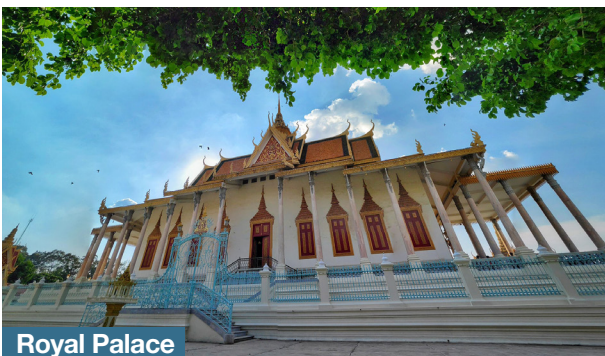
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Kingdom of Cambodia



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.



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.



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.



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

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.

Siem Reap Province



Bayon Temple

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.

Siem Reap Province



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'.



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.



Sambo Prei Kuh Temple

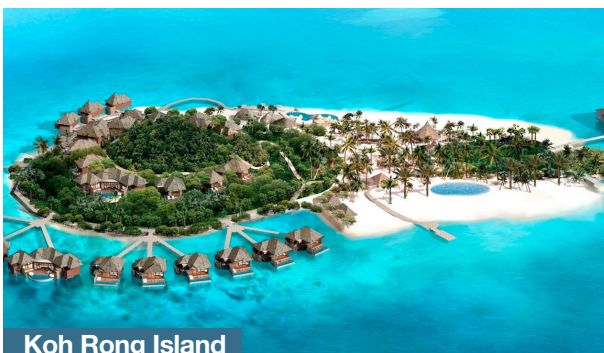
This temple was declared as a World Cultural Heritage Site by UNESCO on July 8, 2017 and is an archaeological site in Cambodia located in Kampong Thom Province. The now ruined complex dates back to the Pre-Angkorian Chenla Kingdom from the late 6th century to the 9th century. It was established by King 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.



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.

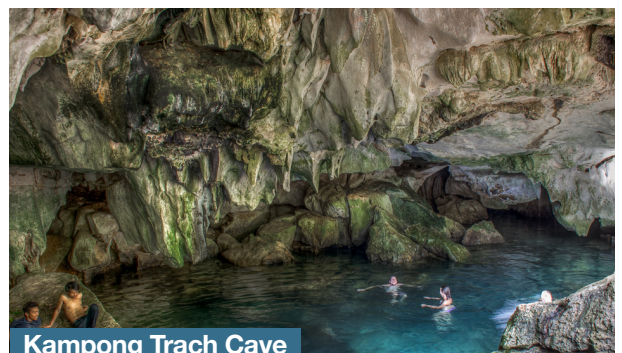
Coastal Area



Koh Rong Island

Preah Sihanouk Province

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.



Kampong Trach Cave

Kompot Province

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

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.

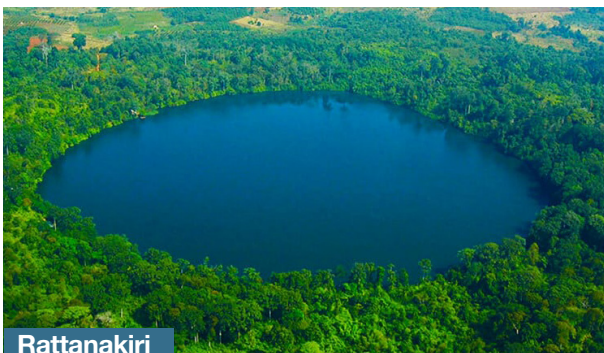


Kep

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.



Mondulakiri

Mondulakiri Province

Mondulakiri 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.



- Intangible Heritage of Humanity
- Tangible Heritage of Humanity & World Wonders

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.



Lhkoan Sbek Thom

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



Lhkoan Khorl

Lhkoan 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



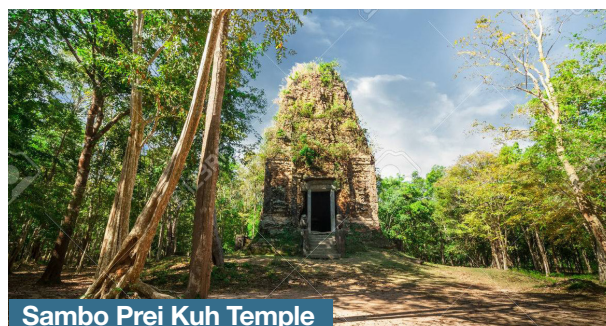
Angkor Wat

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
Total	161	450

Cambodia Inter-Censal Agriculture Survey 2019

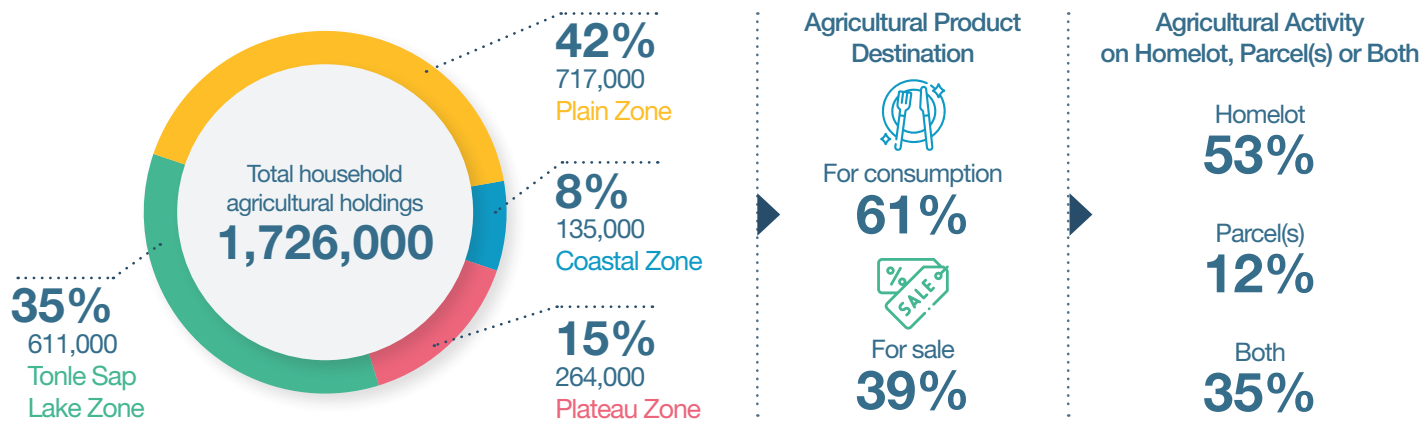
• Household Agricultural Holdings • Crop Production Activity • Livestock & Poultry Raising Activity • Aquaculture & Capture Fishing Activity • Economy



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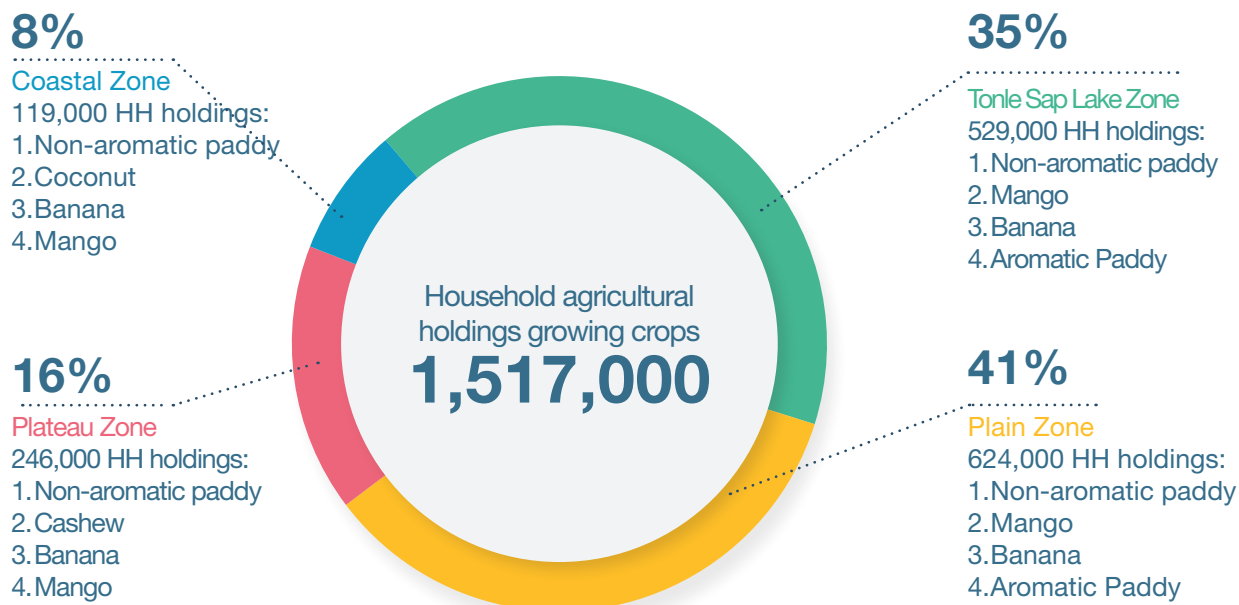
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Household Agricultural Holdings



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	3.5m
Mango	96,765	55,944	359,758
Banana	10,870	8,375	154,000

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

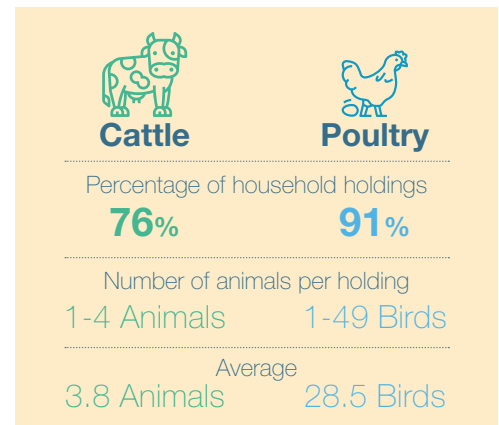
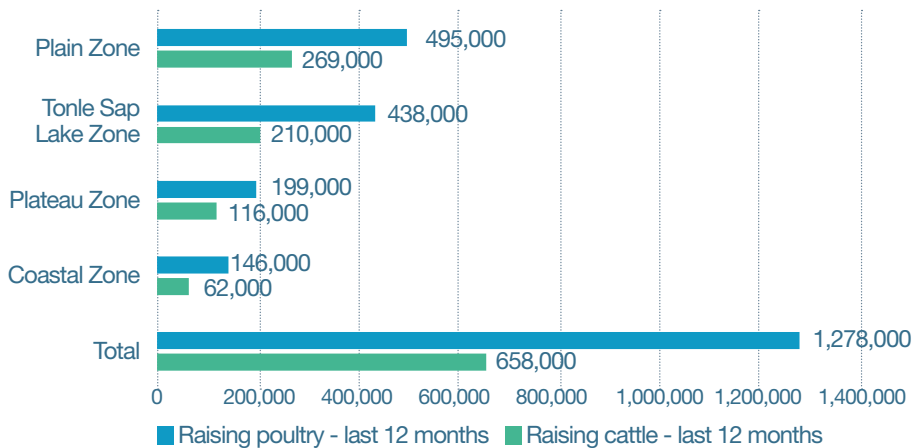


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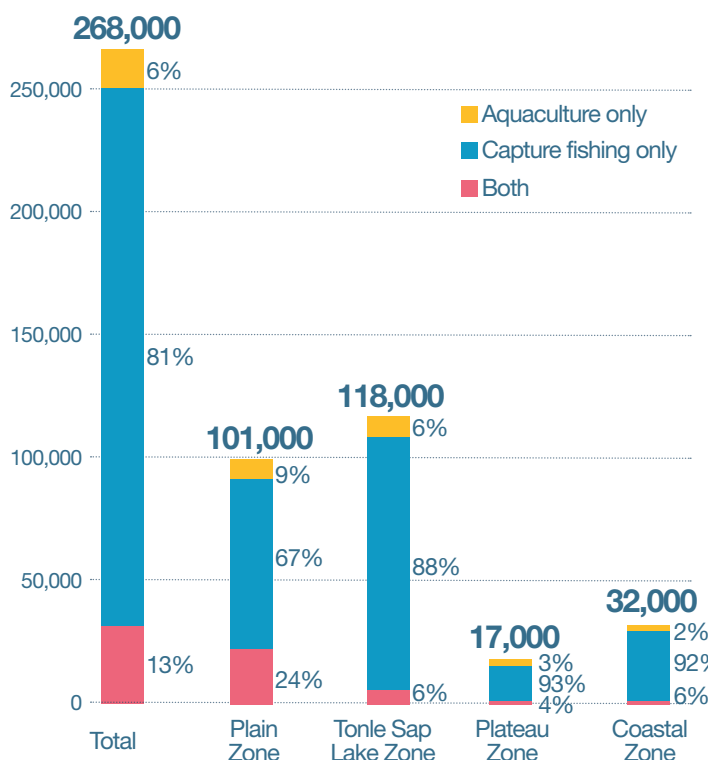
Livestock & Poultry Raising Activity

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

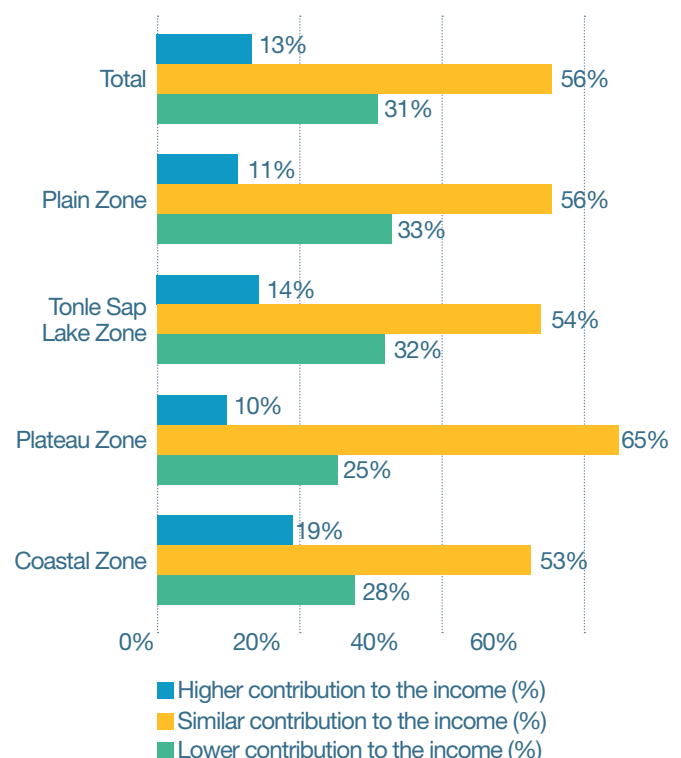
Aquaculture and capture fishing are additional economic activities for **16%** of the household agricultural holdings (~**268,000** holdings).



Economy

Agriculture remains essential for the livelihoods of the Cambodian population.

Percentage of agricultural income to household's total income:



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

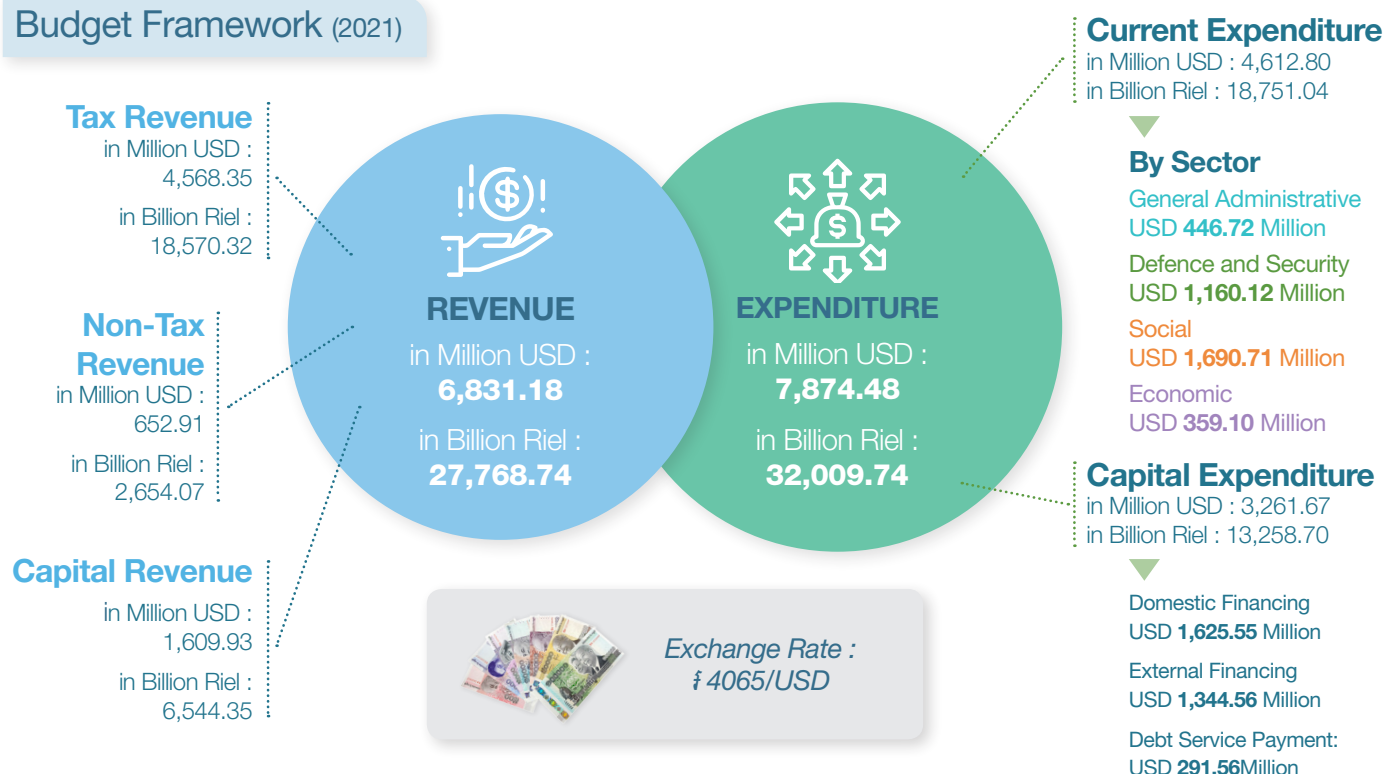
Budget Framework (2019-2021)

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 2020** is estimated to contract by **3.5%** due to the negative impacts of the COVID-19 pandemic on **trade, investment and tourism sectors**. In Q4 2020, the number of international tourists, garment exports, activities in the construction sector and foreign investment have declined sharply. Aside from garment exports, other exporting products such as bicycles, electronic components, wood products, gold and other agricultural products have continued to increase due to the implementation of government intervention measures.

INFLATION

3.4% ↑

Due to rising prices of food and non-alcoholic beverages (5.5%)

EXCHANGE RATE

4,064
Riel/USD

0.2% ↑

BUDGET IMPLEMENTATION

24.4% of BL 2020
-24.1% ↓

Current Revenue
5.8
Trillion Riels

REVENUE
5.9
Trillion Riels

25.7% of BL 2020
-30.7% ↓

Current Expenditure
4.6
Trillion Riels

EXPENDITURE
7.7
Trillion Riels

CURRENT SURPLUS
1.2
Trillion Riels

*BL: Budget Law
*All changes are compared to Q4 2019

CURRENCY

General Currency
136.5
Trillion Riels
15.3% ↑

International Reserves
21.3
Billion USD
13.7% ↑

Lending by Commercial Bank
131.4
Trillion Riels
22.2% ↑

TRADE

Import
5.50
Billion USD
4.6% ↑

Due to growth in import of medicines, foodstuffs and electronics.

Export
3.97
Billion USD
9.7% ↑

Due to growth in export of bicycles, electronic components, wood product & gold.

INVESTMENT

Foreign Investment Projects Outside SEZ

Approved
33
Projects
17 ↓

Investment Fund
1.66
Billion USD
30.4% ↓

Due to decline in construction projects in hotels, shopping malls, supermarkets, garment factories and animal feed.

TOURISM

International Tourist Arrivals
58,463
96.7% ↓

Due to travel restrictions.

CONSTRUCTION

Approved
1,102
Projects
353 ↓

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

Source: ក្រុមការងារស្រាវជ្រាវសេដ្ឋកិច្ច និងហិរញ្ញវត្ថុ របស់ក្រសួងសេដ្ឋកិច្ច និងហិរញ្ញវត្ថុ | Ministry of Economy and Finance

Economic Diplomacy Team - Economy and Finance Statistical Bulletin 2021 | V3 - April 2021



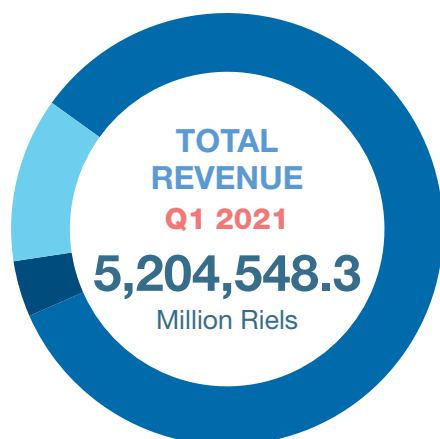
BUDGET LAW 2021

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

The Budget Law of 2021 was designed to achieve Cambodia's projected growth rate at around 4%. However, the "February 20" community event continued to drag on and affect social and economic development, which requires the Royal Government of Cambodia (RGC) to urgently introduce various administrative and fiscal policy measures to sustain the growth.

Others
641,255.6
Million Riels
12.3%

Grants
218,666.5
Million Riels
4.2%



Taxes
4,344,626.2
Million Riels
83.5%

In the first quarter of 2021, the revenue performance of the Budgetary Central Government (BCG) has achieved **25.36%** of the budget law, which increased by **1.69%**, compared to the same period in 2020.

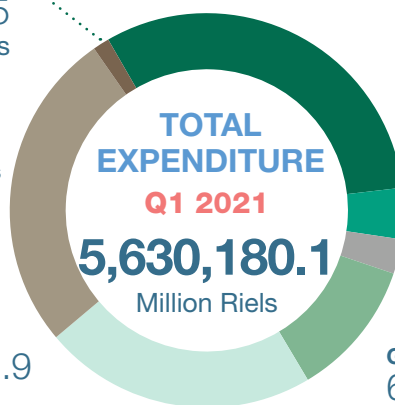
In the first quarter of 2021, the expenditure performance of BCG has achieved **20.65%** of the budget law, which decreased by **0.97%**, compared to the same period in 2020.

The RGC has halted unnecessary spending and has diverted to a proactive spending measure to combat the negative consequences of the COVID-19 pandemic.

Other expense
76,257.5
Million Riels
1.4%

Net acquisition of nonfinancial assets
1,488,749.9
Million Riels
26.4%

Social benefits
1,262,577.9
Million Riels
22.4%



Grants
633,839
Million Riels
11.3%

Compensation of employees
1,772,863.6
Million Riels
31.5%

Use of goods & services
236,137.5
Million Riels
4.2%

Interest
159,754.7
Million Riels
2.8%

Amid the COVID-19 pandemic, the RGC has been able to effectively managed and implemented its Budget Law of 2021 in a timely manner.

BCG RESULT IN Q1 2021

Net acquisition of financial assets
745,204
Million Riels

Net incurrence of liabilities
1,170,836
Million Riels

Balance of Net Lending and Borrowing
(425,631.8)
Million Riels

State Budget Implementation

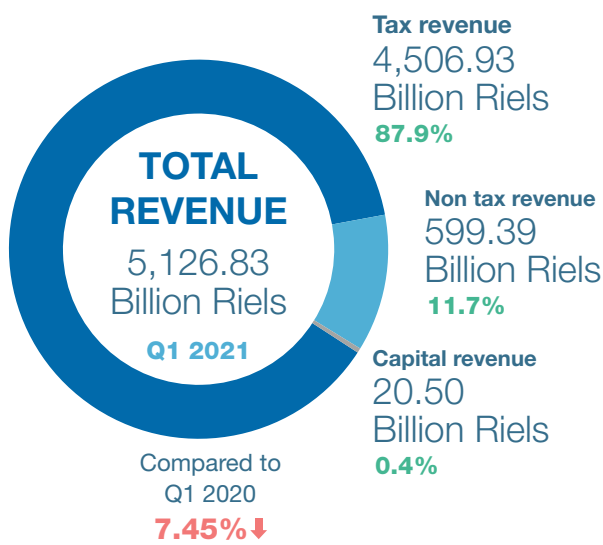
Q1 2021



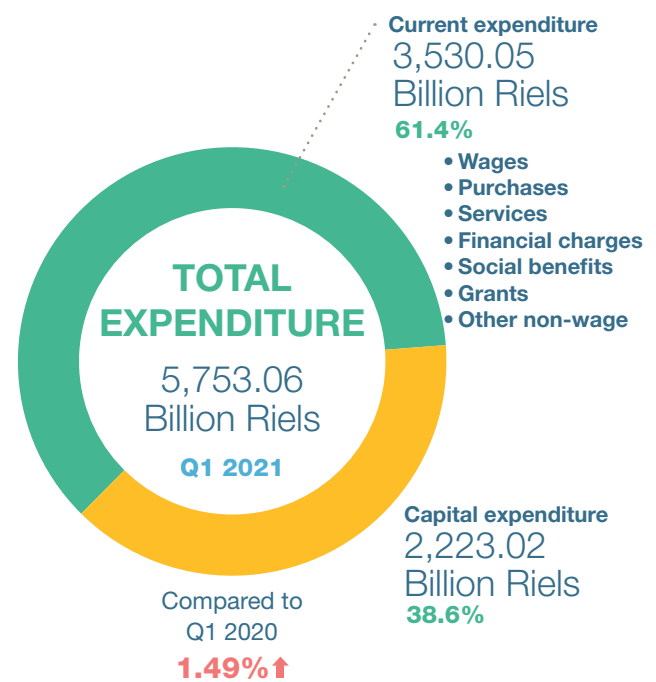
The Budget Law of 2021 was designed to achieve Cambodia’s projected growth rate at around 4%. However, the February 20 community event continued to drag on and affect social and economic development, which requires the Royal Government of Cambodia (RGC) to urgently introduce various administrative and fiscal policy measures to sustain the growth.

BUDGET LAW 2021 (Projected)

REVENUE 17.07% of GDP	19,927.19 Billion Riels
EXPENDITURE 25.11% of GDP	29,306.15 Billion Riels



In the first quarter of 2021, the total expenditure of the BCG has achieved 19.63% of the budget law, which increased by 1.49%, compared to the same period in 2020.



In the first quarter of 2021, the total domestic revenue of the Budgetary Central Government (BCG) has reached 25.73% of the budget law, which decreased by 7.45%, compared to the same period in 2020.

The decline was due to a slowdown in economic activity amid the COVID-19 pandemic especially in tourism, civil aviation, and fishery sectors.

Amid the COVID-19 pandemic, in the first quarter of 2021, the implementation of the BCG financing has reached **KHR1,389.50 billion** or **27.04%** of the budget law, while the government deposit increased by **KHR144.56 billion**. Moreover, the current account has a total surplus of **KHR1,576.28 billion**, while the overall balance has a total deficit of **KHR626.23 billion** or **73.29%** less than the budget law.

As a result, the RGC is implementing the intervention measures (Round 8) to offset the impact on key sectors caused by the “February 20” community event and restore Cambodia’s economic growth.

Socio-Economic Trends

Annual 2020



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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↑

Due to the increase of the construction projects on housing.

8,753

Million USD

32.1%↓

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



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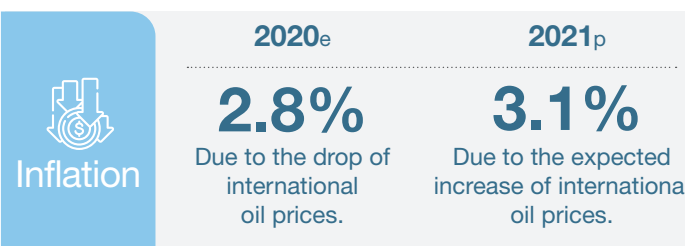
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Summary

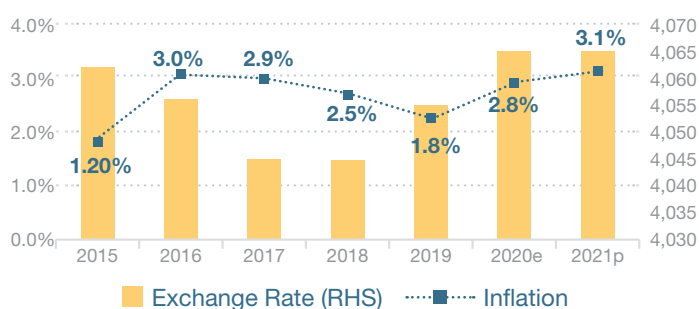


GDP and Sectoral Growth 2017-2021 (%)

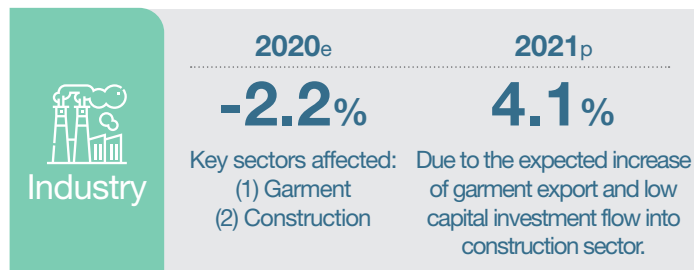
Sector	2017	2018	2019	2020e	2021p
GDP	7.0	7.5	7.1	-1.9	3.5
Agriculture	1.7	1.1	-0.5	0.9	1.6
Crops	2.2	1.3	0.6	0.8	1.8
Others	1.2	0.9	-1.9	0.9	1.3
Industry	9.7	11.6	11.3	-2.2	4.1
Garment	5.8	9.6	6.6	-6.7	1.6
Construction	18.0	17.5	20.8	-5.3	3.3
Others	10.3	9.2	10.3	13.1	10.1
Service	7.0	6.8	6.2	-3.0	3.6
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
Real Estate & Business	8.7	8.5	7.0	-5.1	2.6



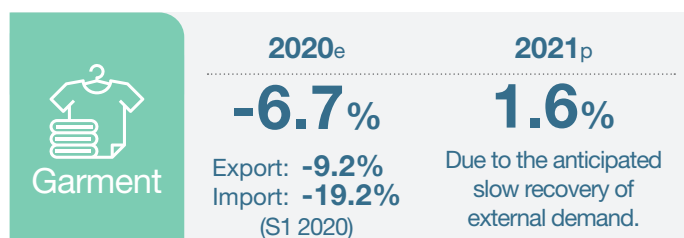
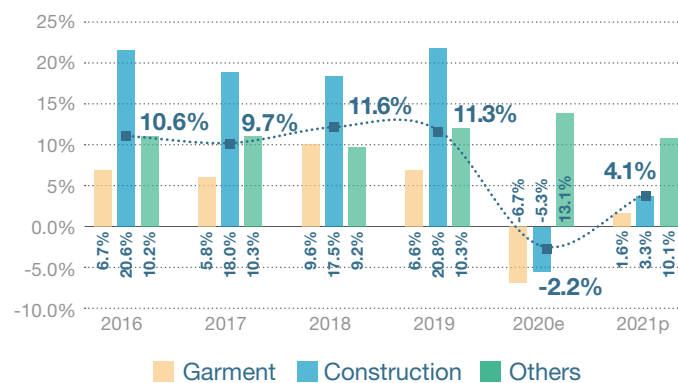
Inflation Rate 2015-2021



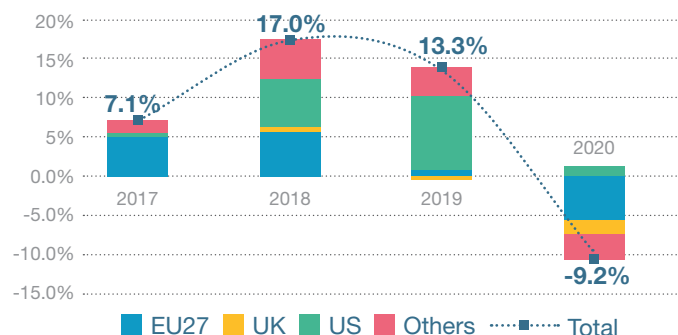
Industry Sector



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

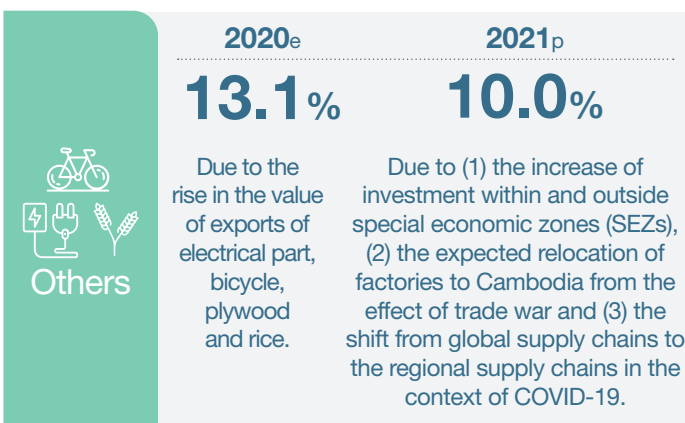
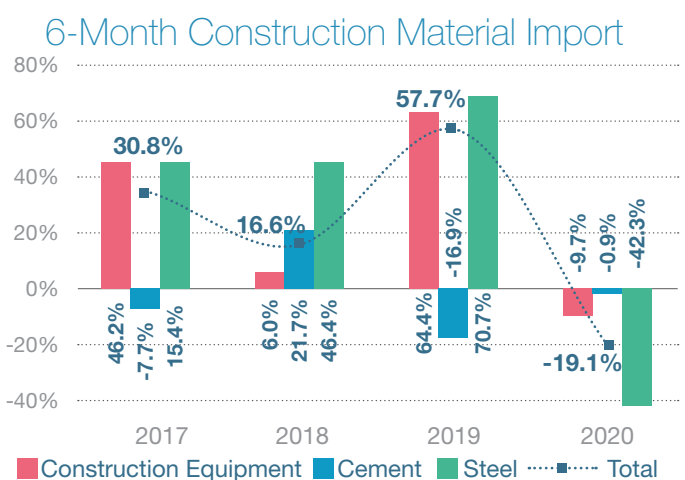
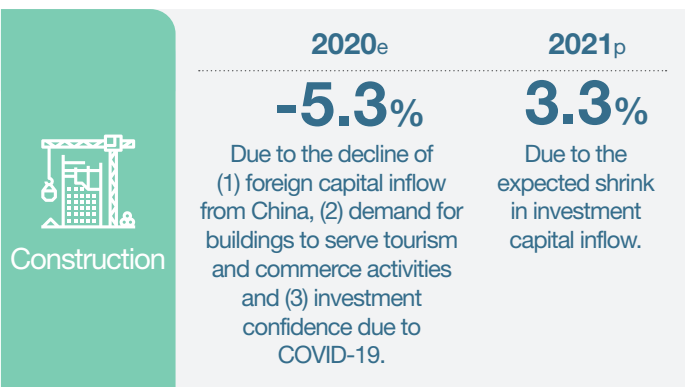
(Projection based on mid-year assessment by June 2020)

• Summary • Industry Sector • Service Sector

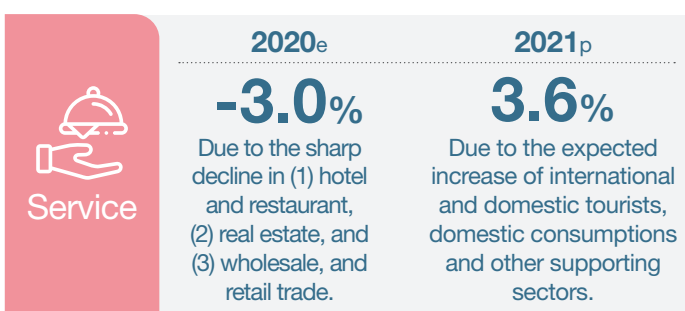


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Service Sector



Growth of Services Sector and Its Sub Sector 2016-2021

