

เศรษฐกิจสาธารณรัฐเช็ก Q4/2565

- GDP สาธารณรัฐเช็ก Q4/65 ขยายตัวเพียง 0.2% YoY แต่หดตัวเพียง 0.4% QoQ หากพิจารณา ปี 65 ขยายตัว 2.4% YoY
- Q4/65 การส่งออกสินค้า มูลค่า 62.0 Bn USD ขยายตัว 5.5% YoY และ 7.5% QoQ การนำเข้าสินค้า มูลค่า 60.1 Bn USD ขยายตัว 7.3% YoY และ 5.4% QoQ ส่งผลให้ดุลการค้า เกินดุล 1.9 Bn USD เกินดุลลดลงจากช่วงเดียวกันของปีก่อน แต่เกินดุลเพิ่มขึ้นจากไตรมาสก่อน หากพิจารณา ปี 65 การส่งออกสินค้า มูลค่า 241.2 Bn USD ขยายตัว 6.0% YoY การนำเข้าสินค้า มูลค่า 235.9 Bn USD ขยายตัว 10.8% YoY ส่งผลให้ดุลการค้า เกินดุล 5.3 Bn USD เกินดุลลดลงมากจากปีก่อน
- ดัชนีราคาผู้บริโภค (HICP) Q4/65 ขยายตัว 16.5% YoY และ 0.5% QoQ หากพิจารณา ปี 65 ขยายตัว 14.8% YoY

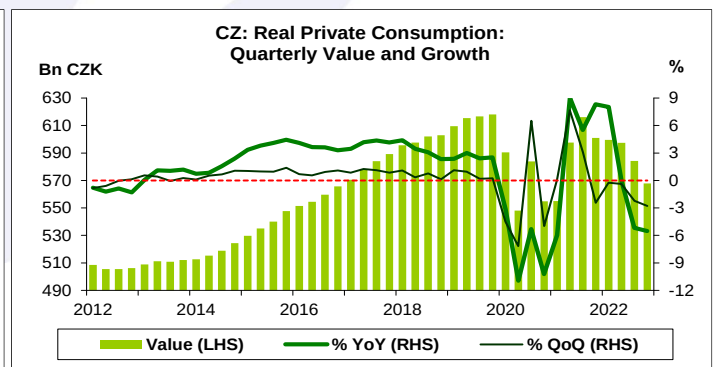
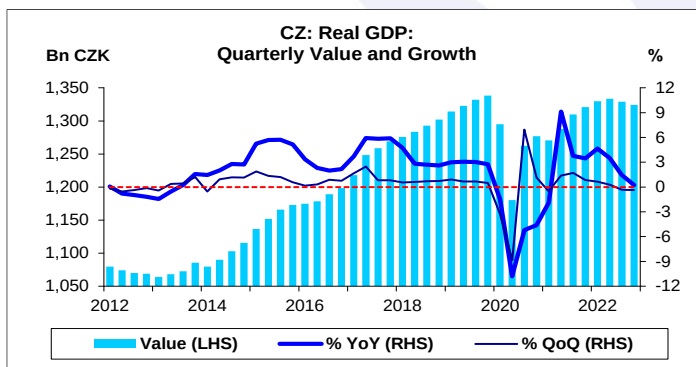
การประเมินอันดับค่า อิงค่าต่ำสุด ค่าเฉลี่ย และค่าสูงสุด (ปี 2555-66)

	All Periods			Same Periods			Latest
	Month	Quarter	Year	YTD	Quarter	Month	
GDP (CZK)	-	5	5	5	5	-	Dec-22
Private Consumption (CZK)	-	3	4	4	3	-	Dec-22
Government Consumption (CZK)	-	5	5	5	5	-	Dec-22
Investment (CZK)	-	5	5	5	5	-	Dec-22
Export of Goods Value (USD)	4	5	5	5	5	5	Dec-22
Import of Goods Value (USD)	4	5	5	5	5	5	Dec-22
Trade Balance (USD)	2	2	1	1	1	3	Dec-22
Current Account Balance (USD)	3	2	1	1	1	3	Dec-22
International Reserve (USD)	4	4	4	4	4	4	Feb-23
Unemployment Rate	2	2	2	2	2	2	Jan-23
HICP	5	5	5	5	5	5	Jan-23
CZK/USD	3	4	4	3	4	3	Feb-23

หมายเหตุ: 5 สูง 4 ค่อนข้างสูง 3 ปานกลาง 2 ค่อนข้างต่ำ 1 ต่ำ

อัตราการเปลี่ยนแปลงรายปี (ปี 2555-65)

	Average YoY Growth	CAGR
GDP (CZK)	1.9	1.9
Private Consumption (CZK)	1.3	1.3
Government Consumption (CZK)	1.8	1.8
Investment (CZK)	2.4	2.3
Export of Goods Value (USD)	2.4	3.6
Import of Goods Value (USD)	4.5	4.1
HICP	3.1	3.1
CZK/USD	2.8	2.6

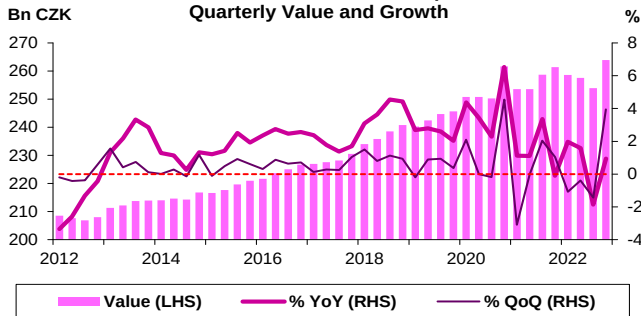


ที่มา: Ministry of Trade and Industry of Singapore, CEIC และ IMF

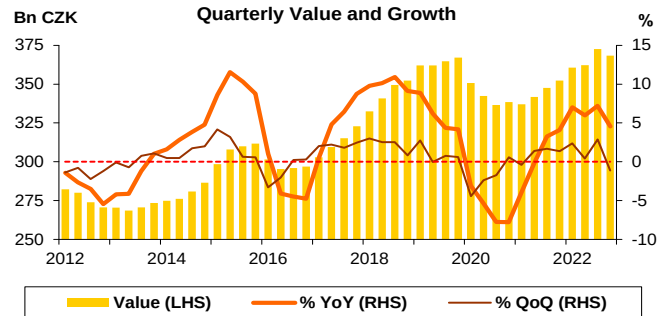
หมายเหตุ: 1. CAGR คือ Compound Annual Growth Rate

2. GDP หมายถึง GDP ตามราคาคงที่

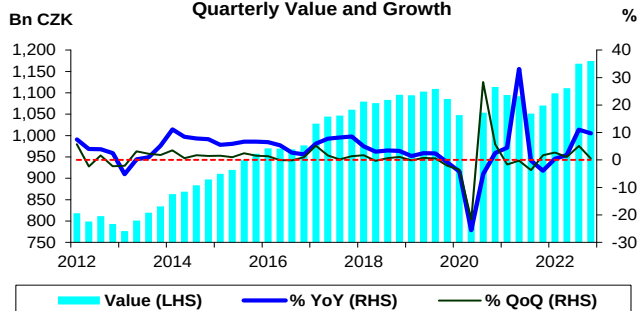
**CZ: Real Government Consumption:
Quarterly Value and Growth**



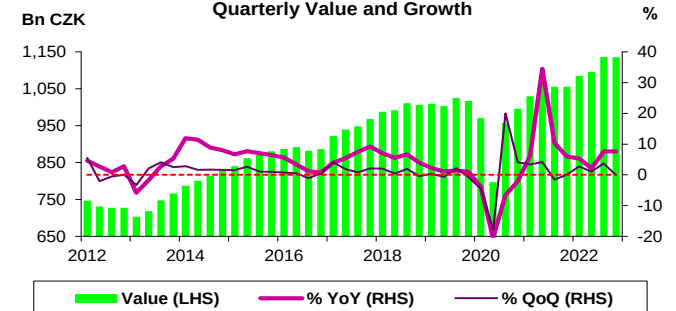
**CZ: Real Investment:
Quarterly Value and Growth**



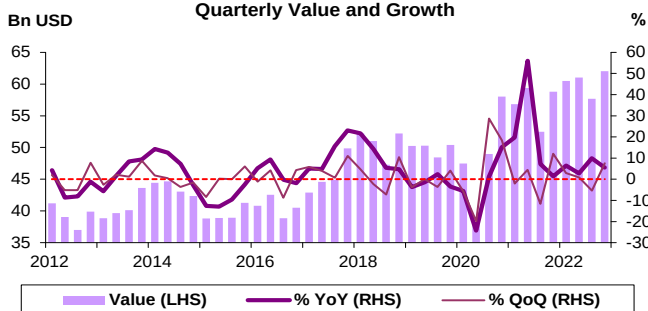
**CZ: Real Export of Goods and Services:
Quarterly Value and Growth**



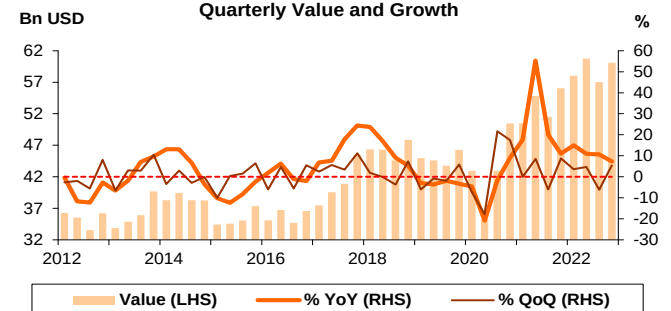
**CZ: Real Import of Goods and Services:
Quarterly Value and Growth**



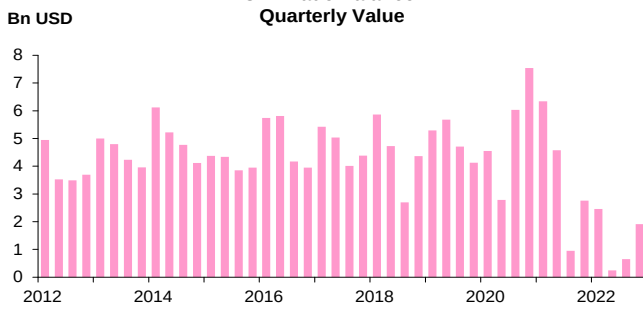
**CZ: Export of Goods:
Quarterly Value and Growth**



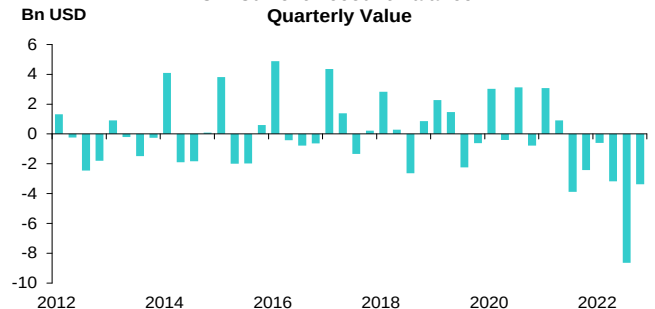
**CZ: Import of Goods:
Quarterly Value and Growth**



**CZ: Trade Balance:
Quarterly Value**



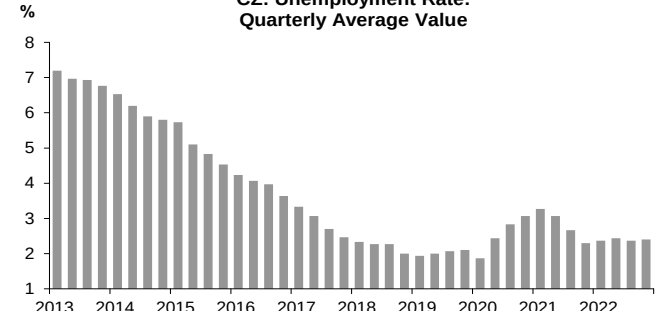
**CZ: Current Account Balance:
Quarterly Value**

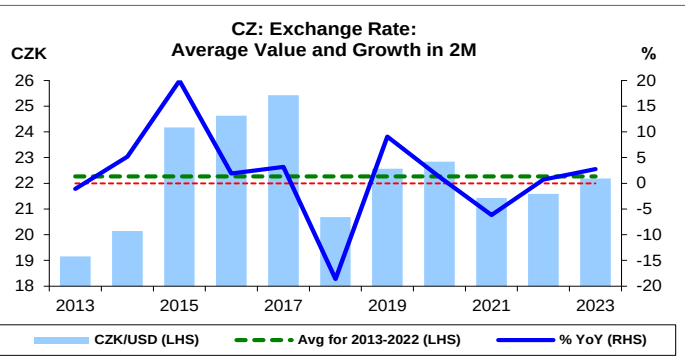
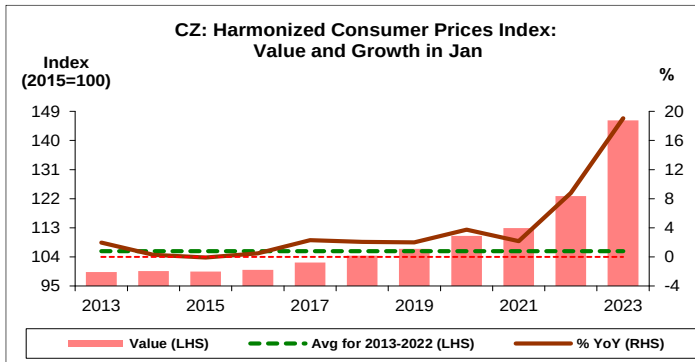
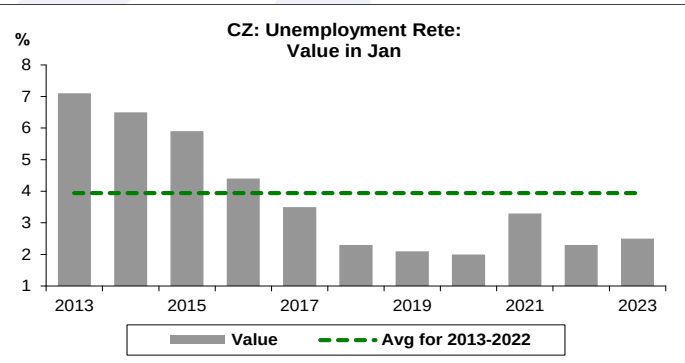
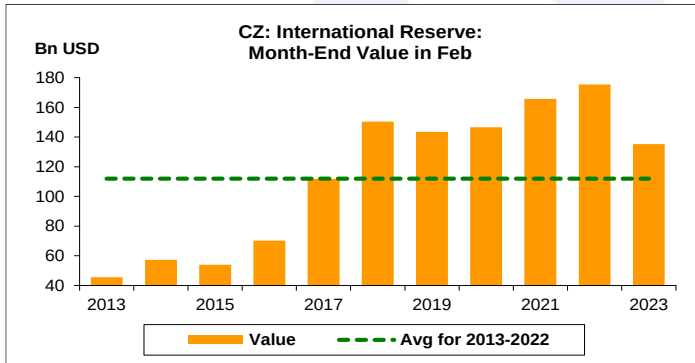
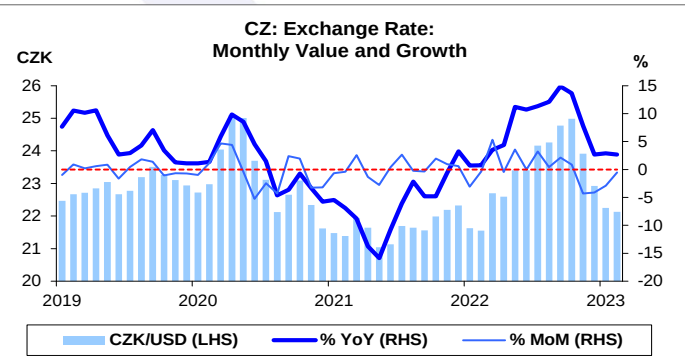
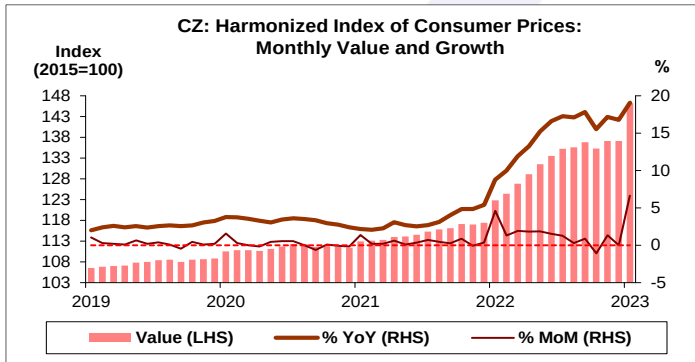
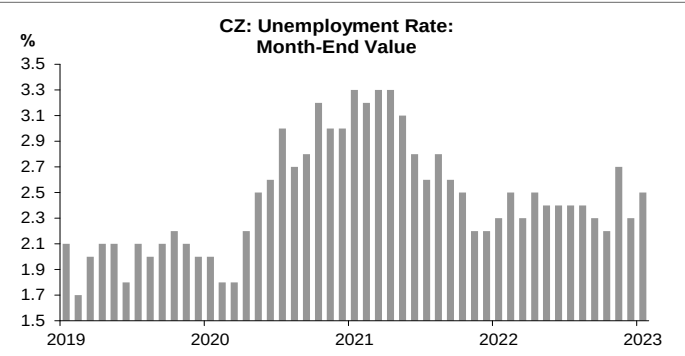
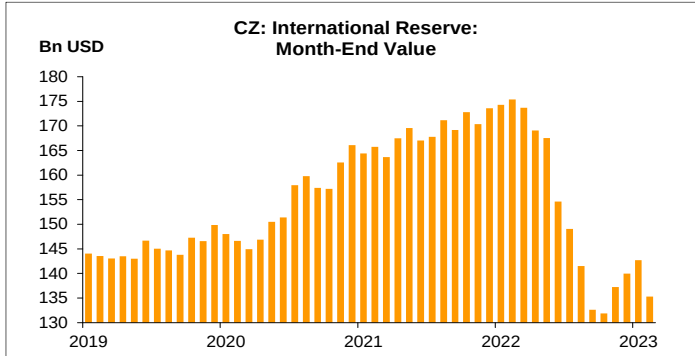
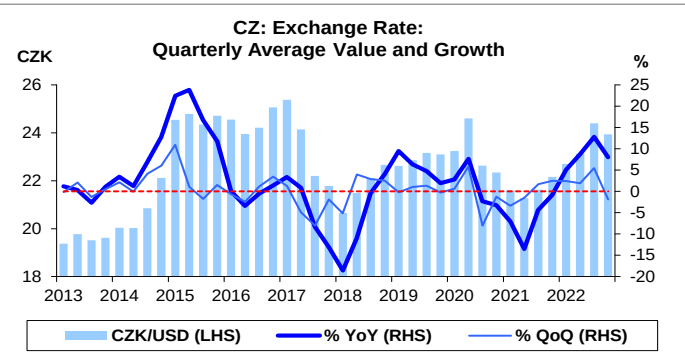
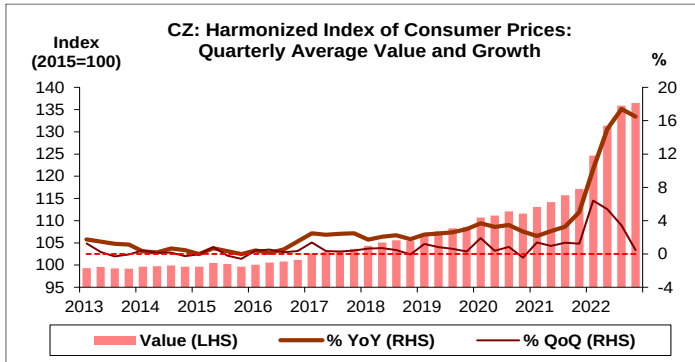


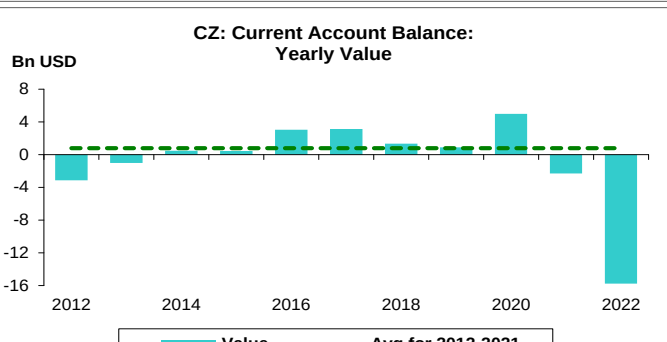
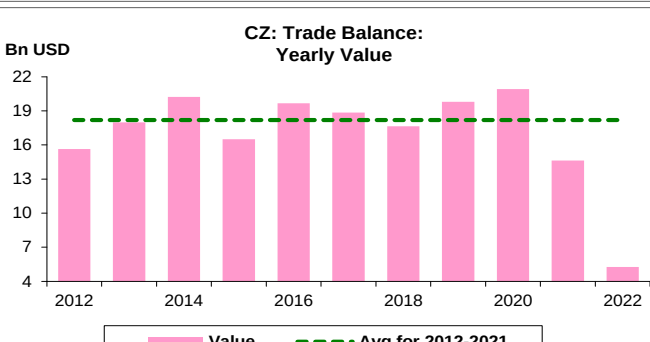
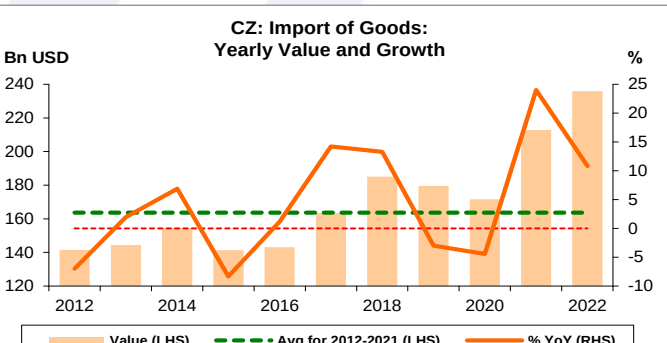
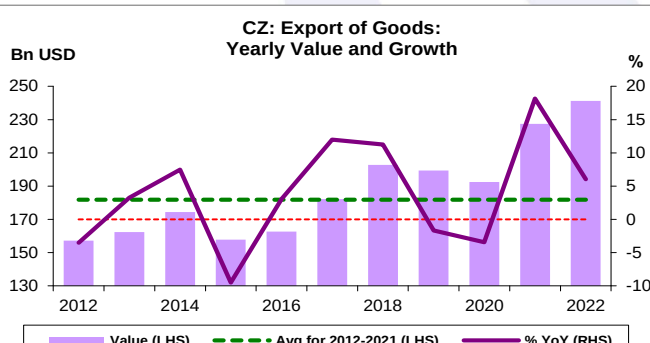
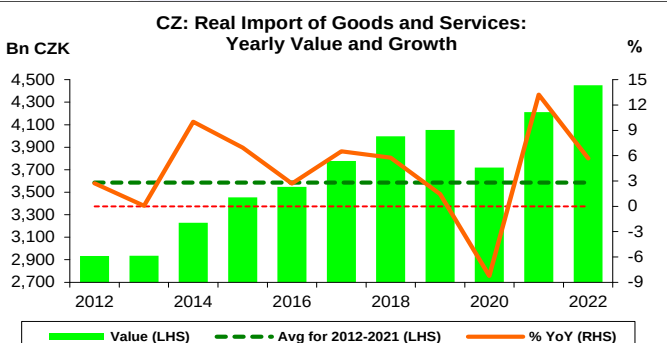
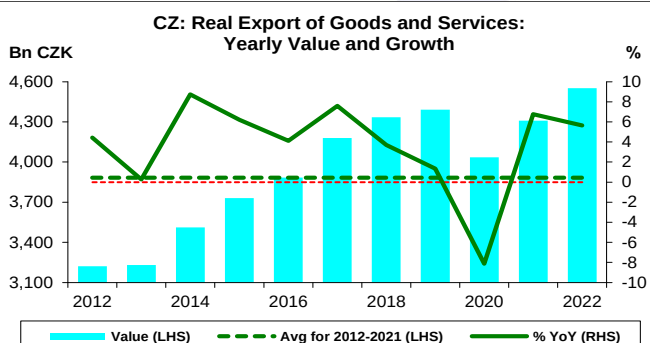
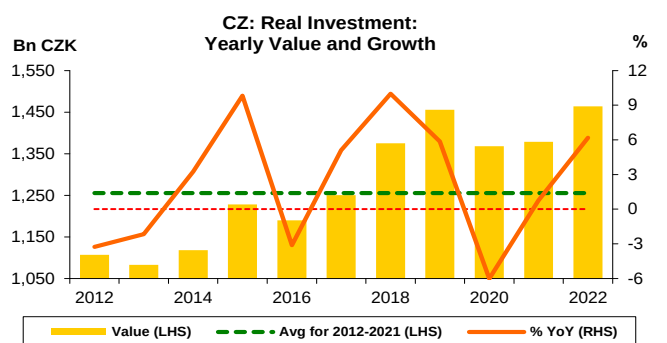
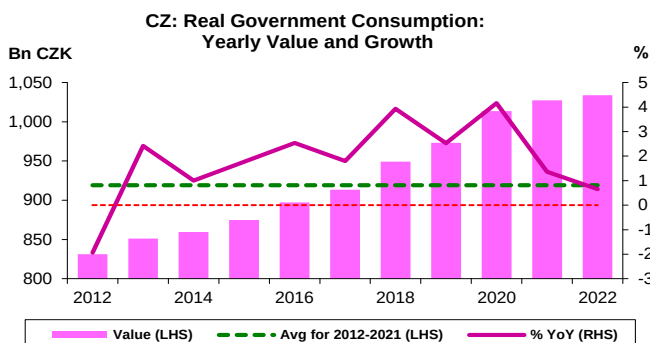
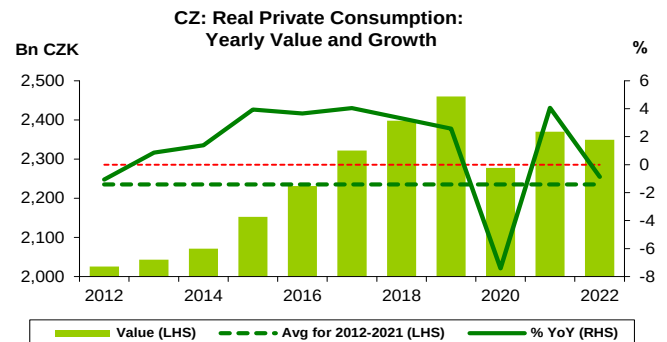
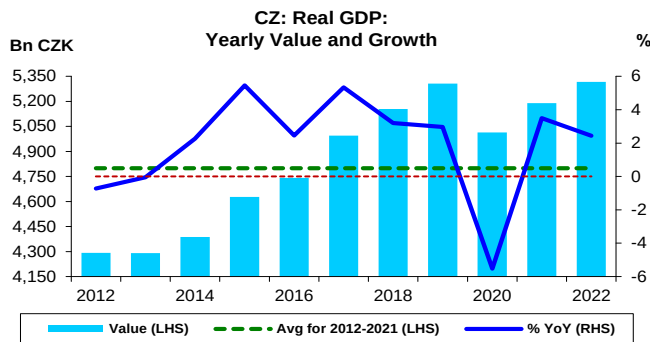
**CZ: International Reserve:
Quarter-End Value**

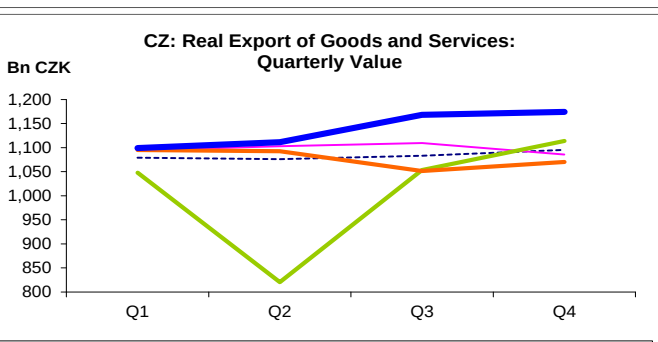
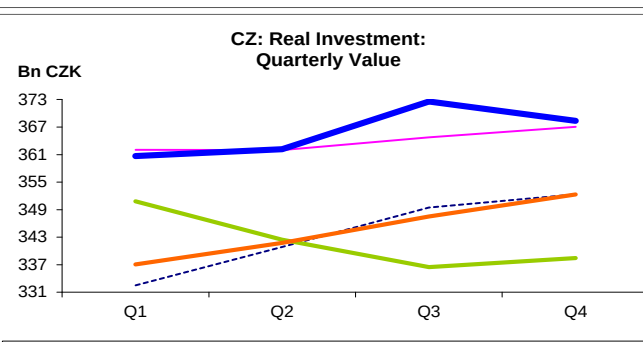
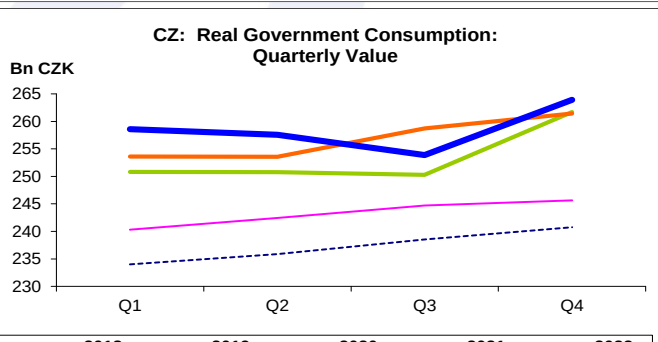
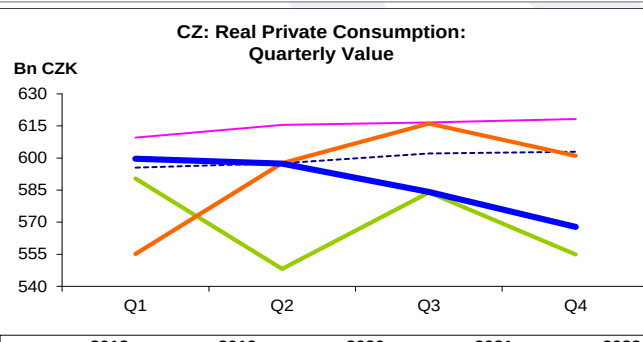
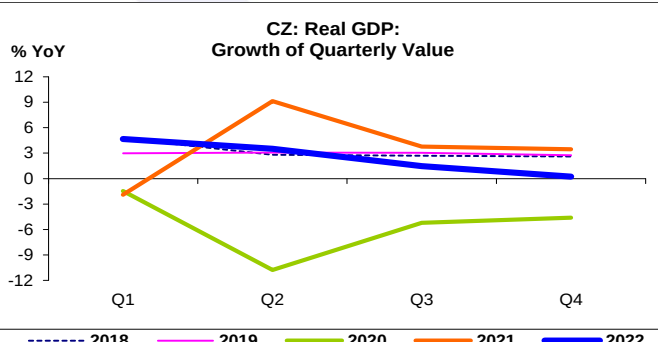
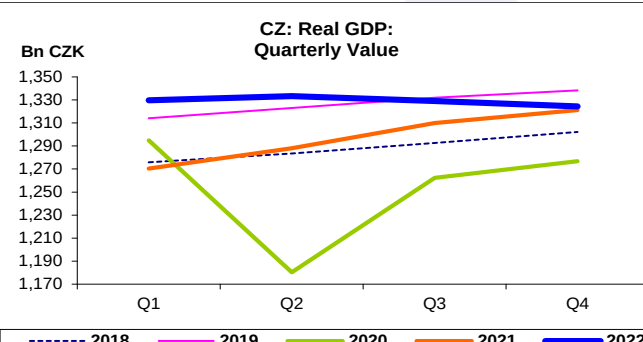
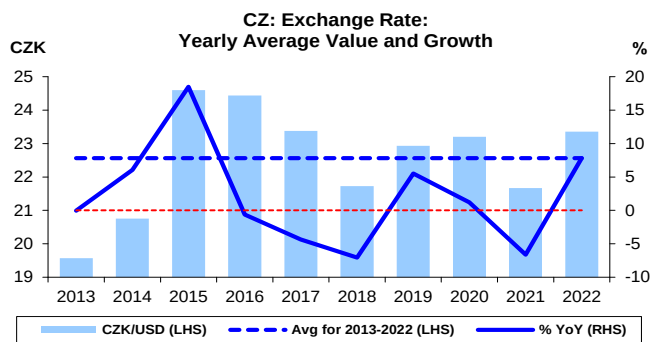
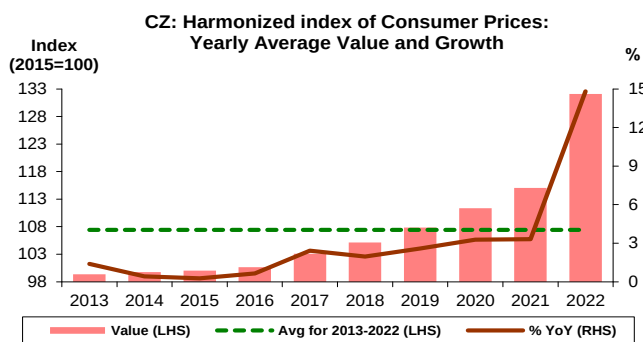
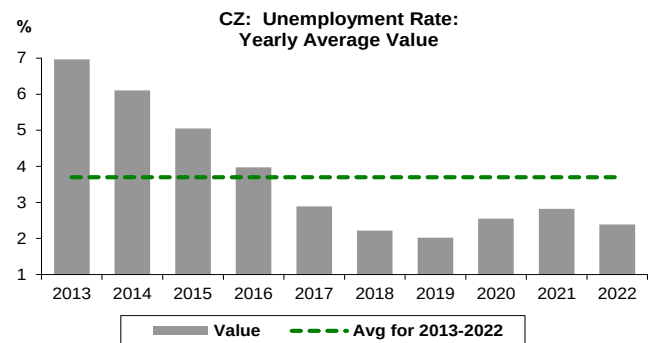
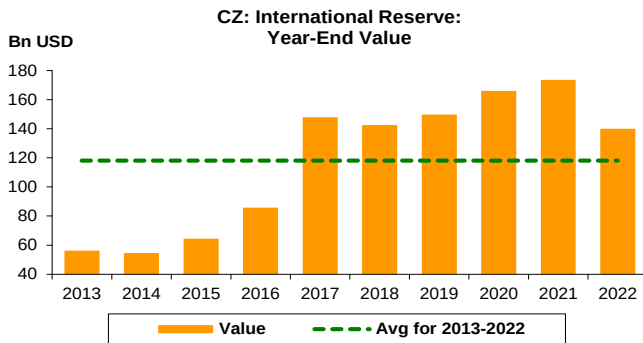


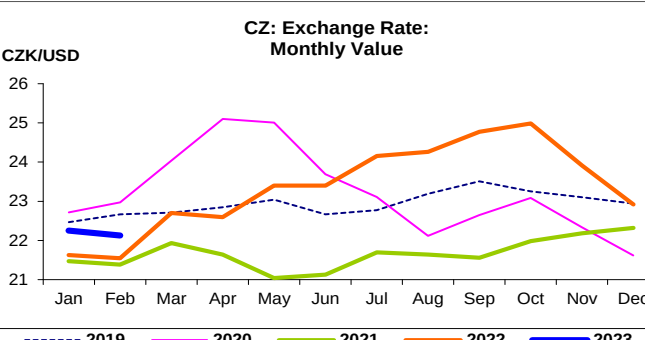
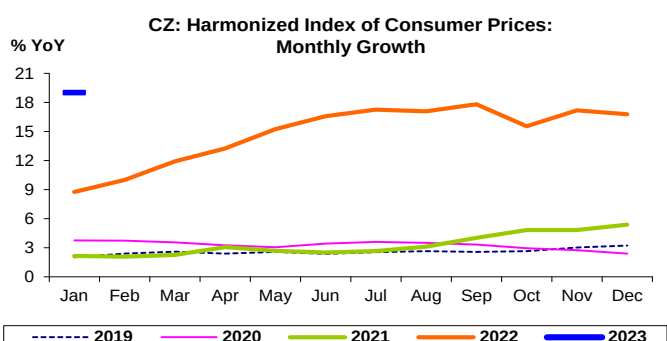
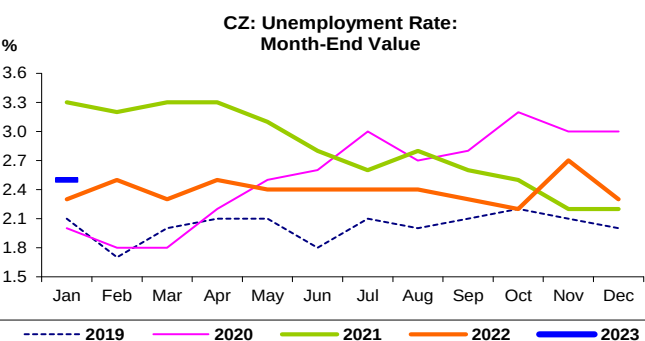
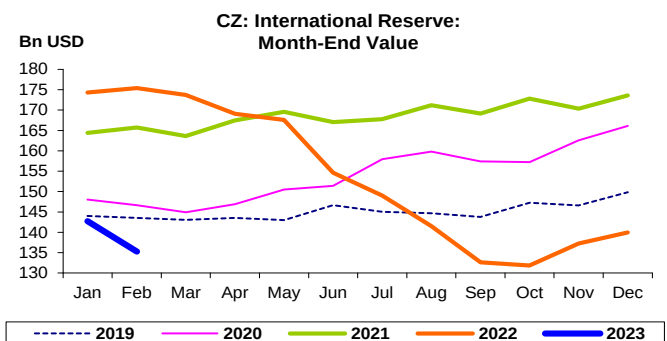
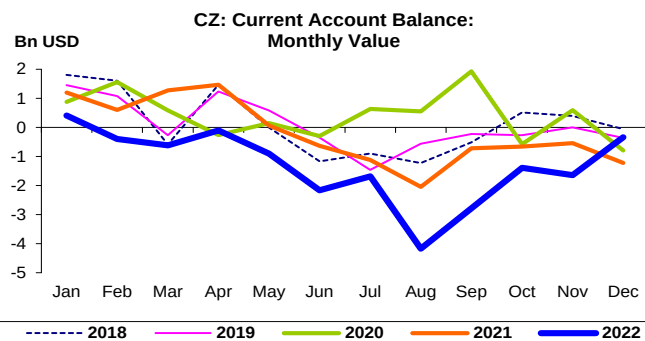
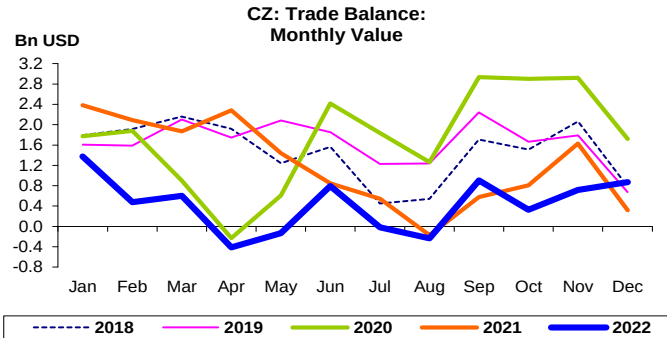
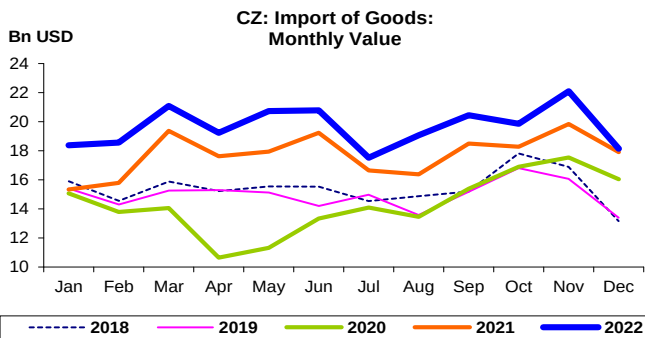
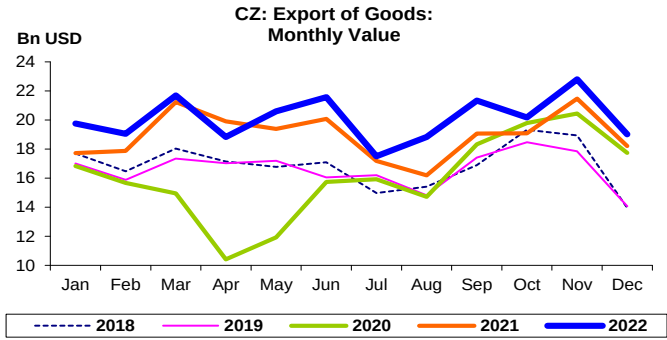
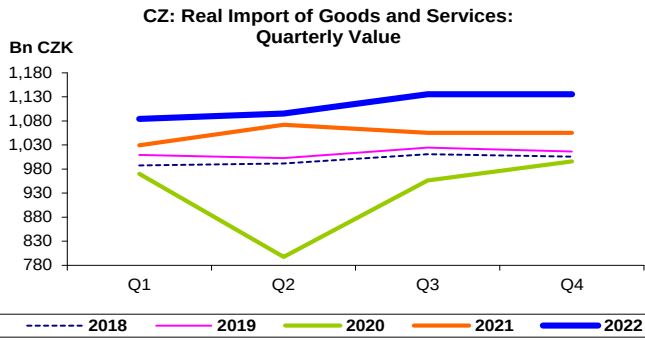
**CZ: Unemployment Rate:
Quarterly Average Value**

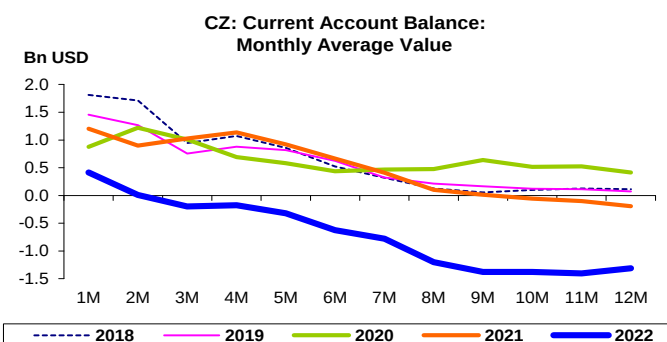
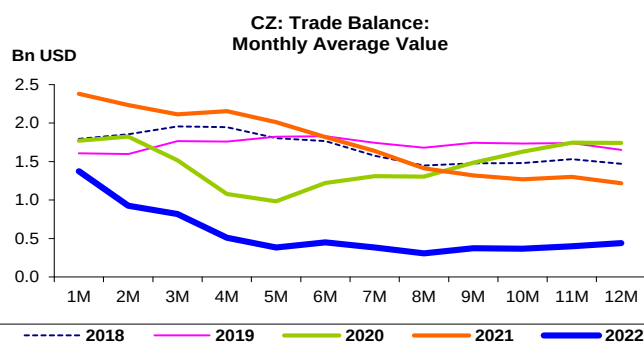
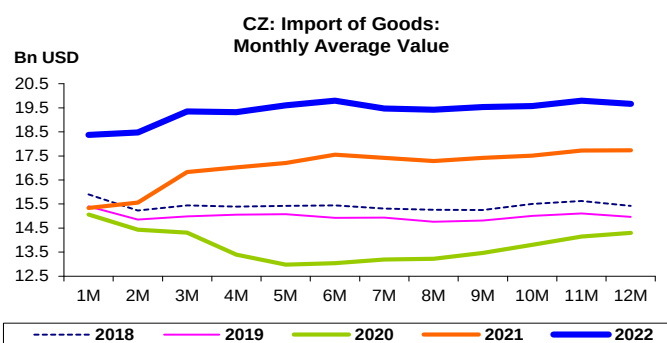
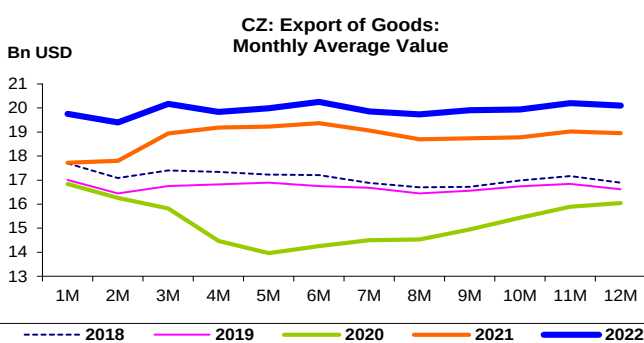
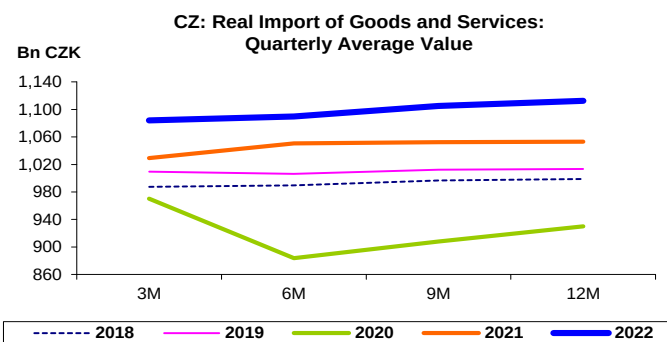
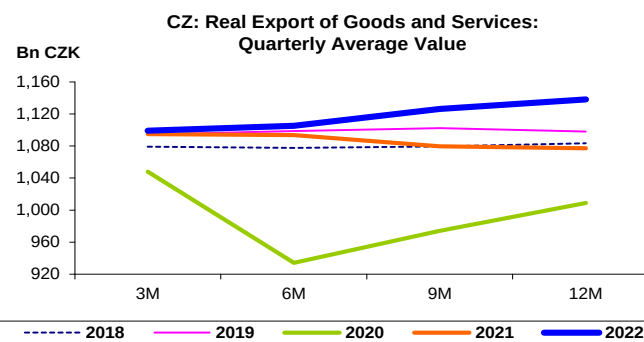
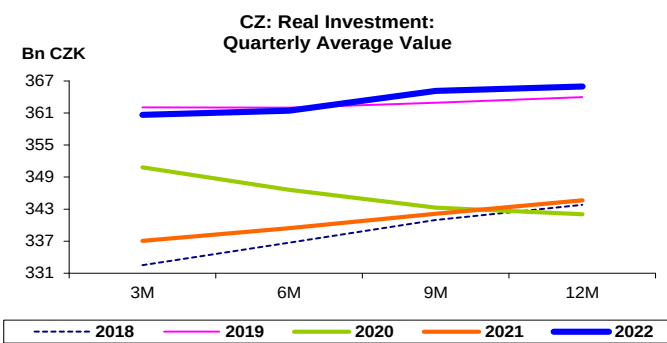
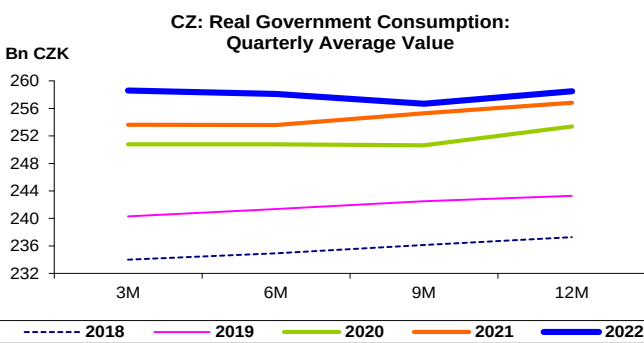
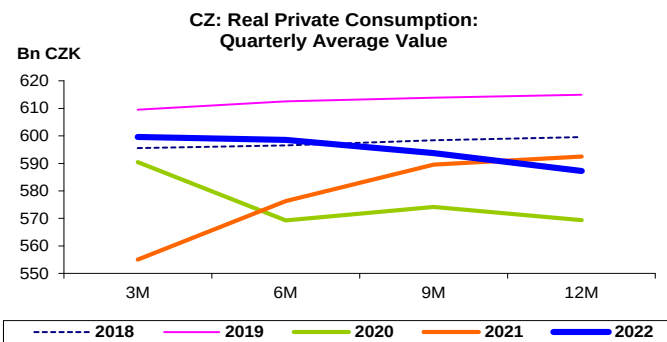
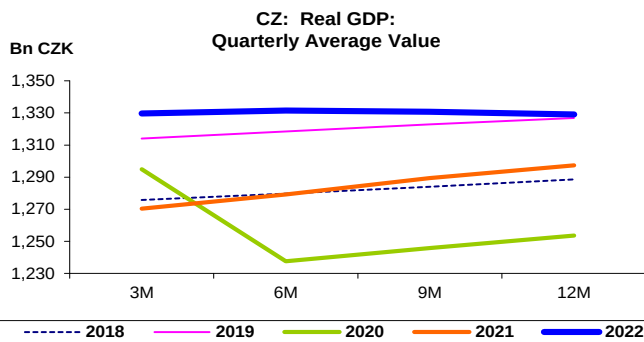


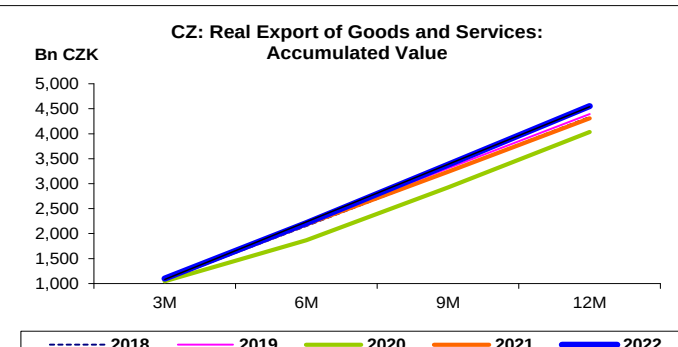
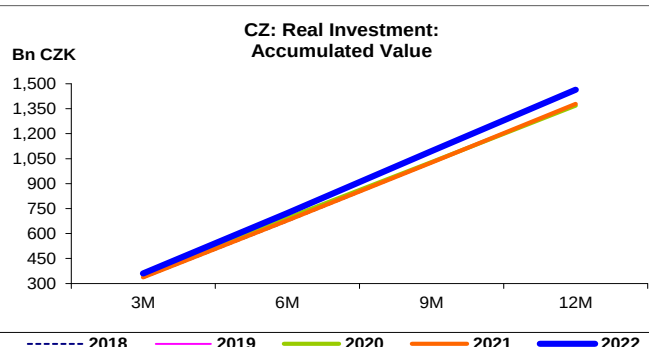
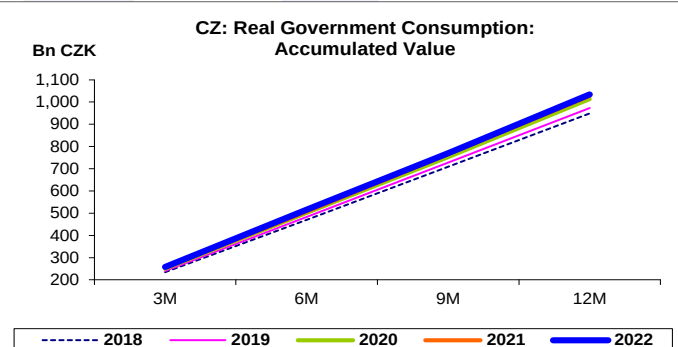
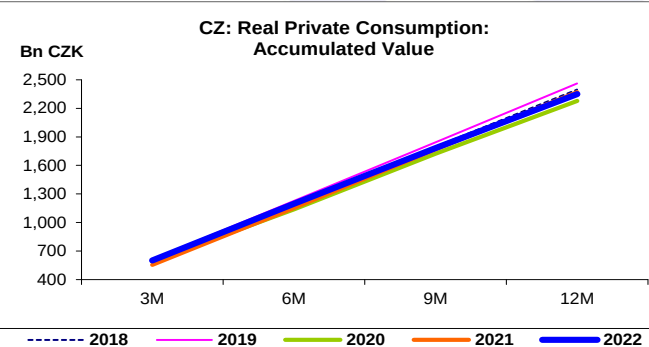
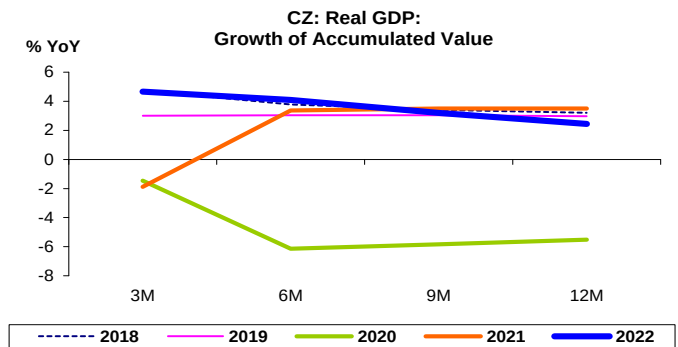
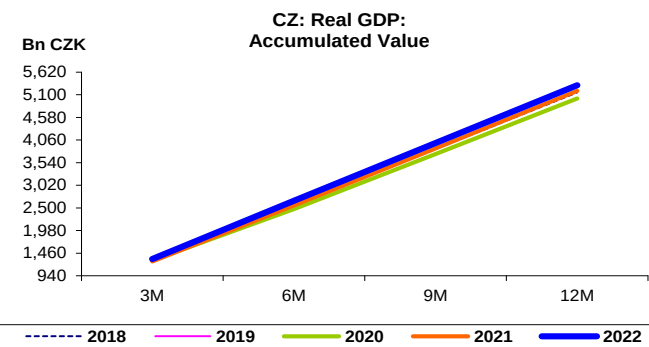
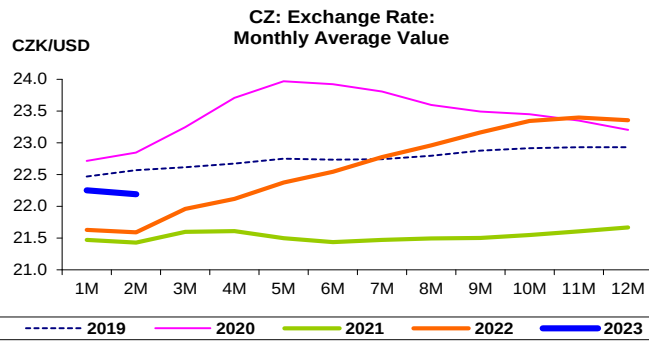
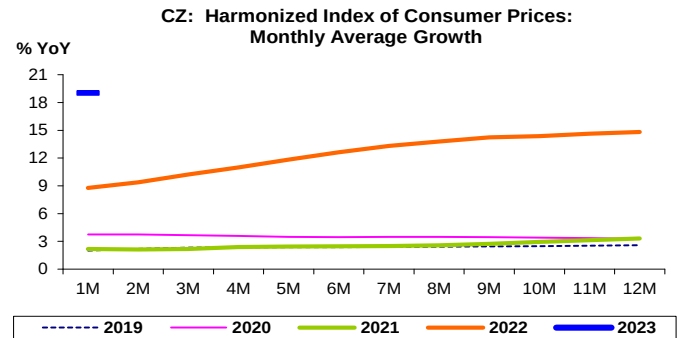
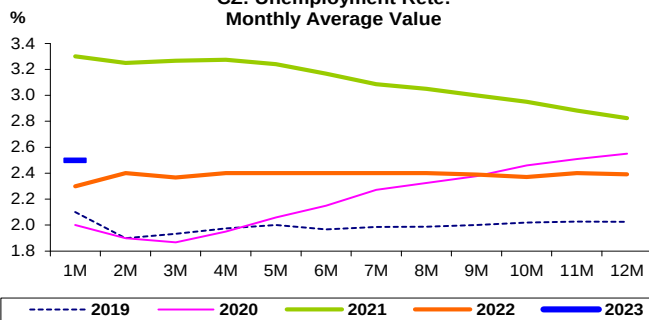


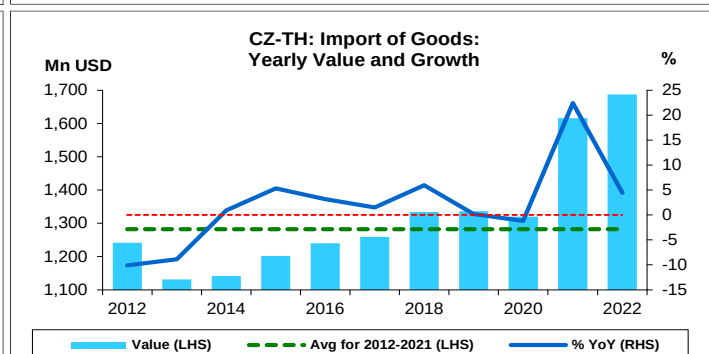
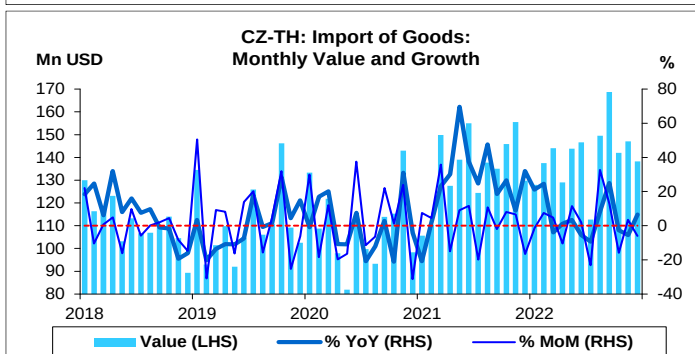
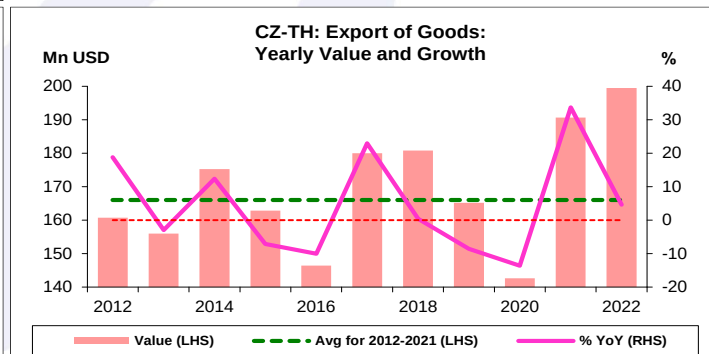
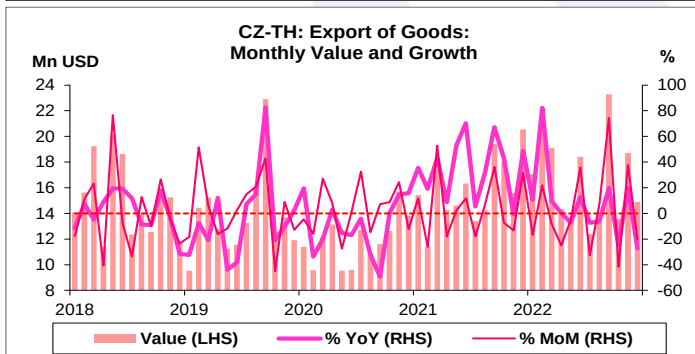
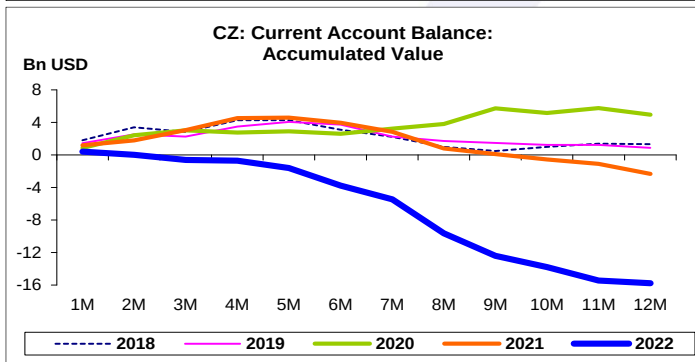
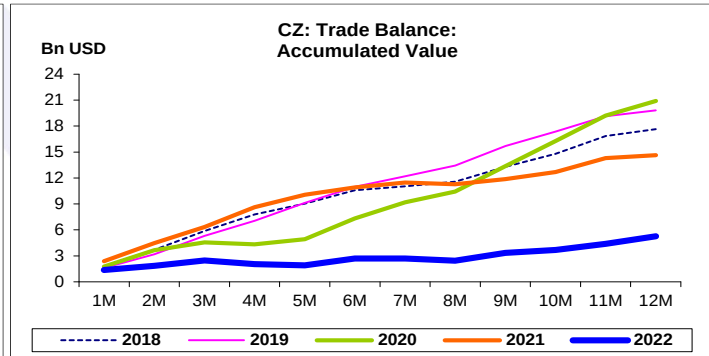
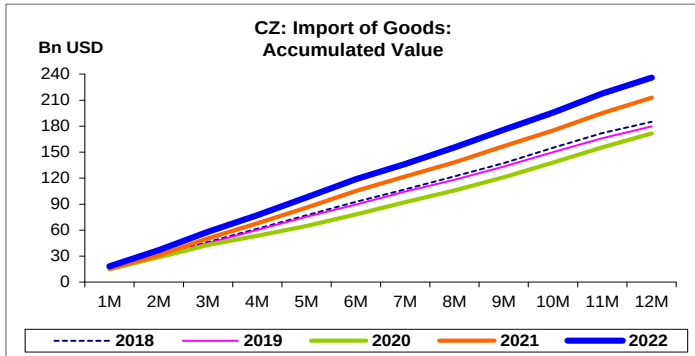
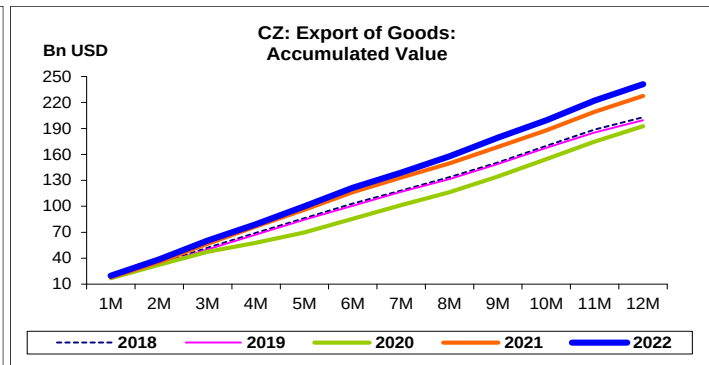
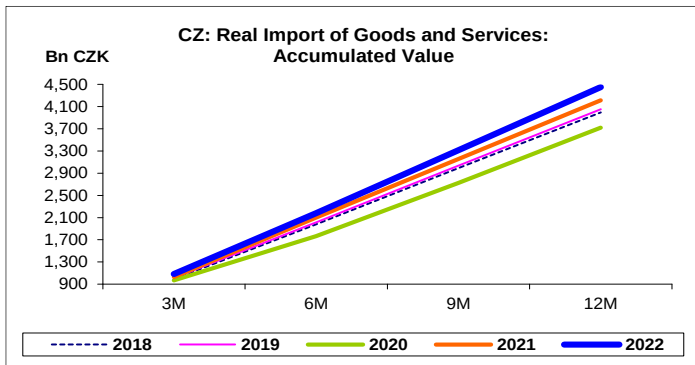


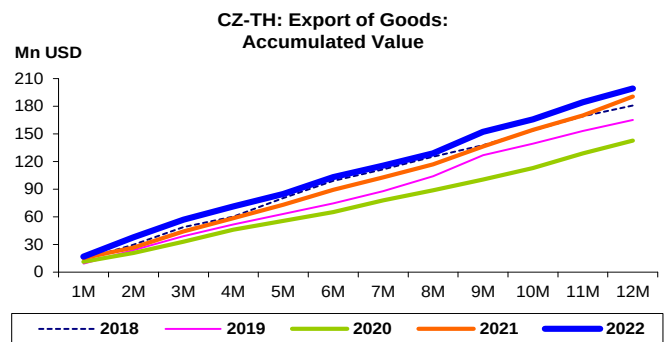
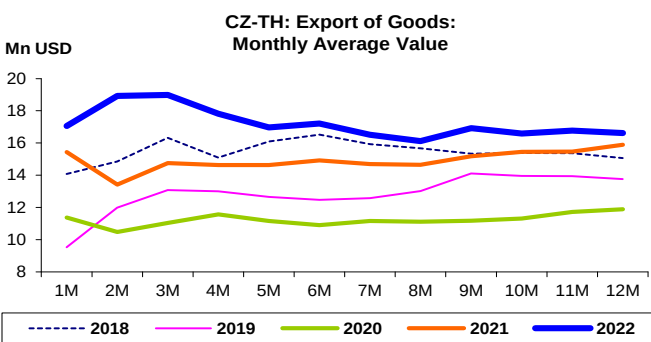
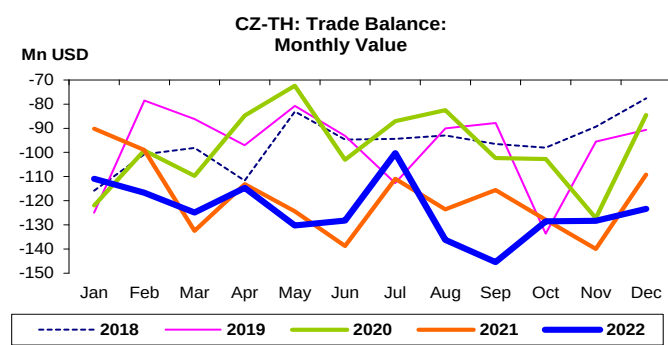
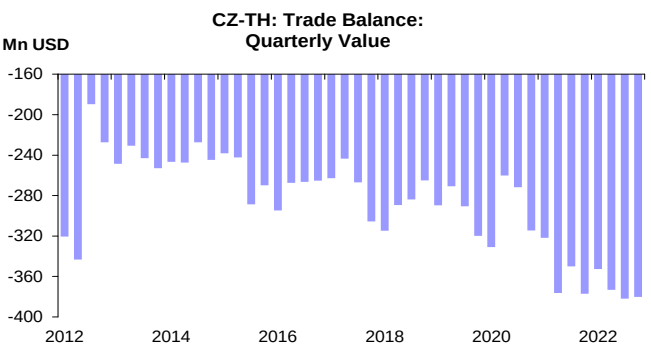
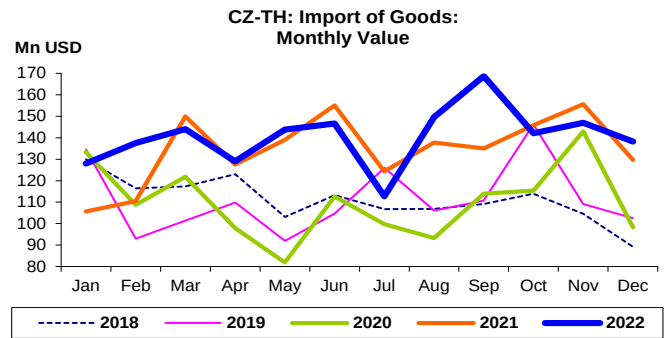
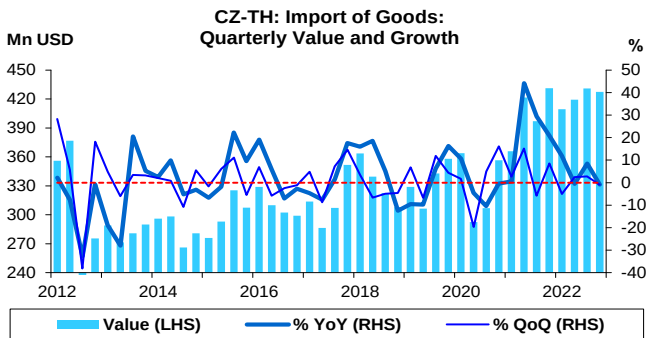
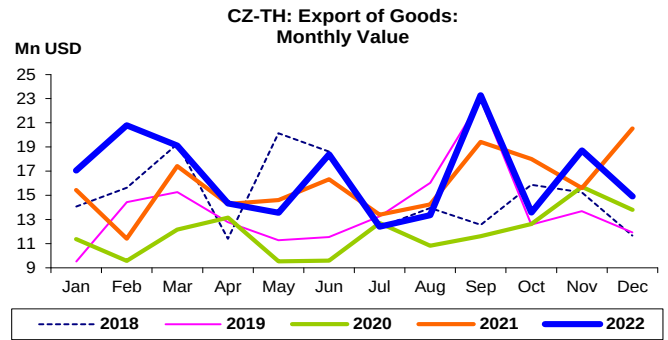
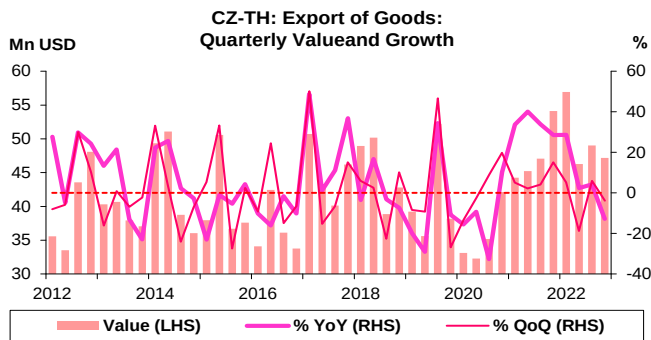
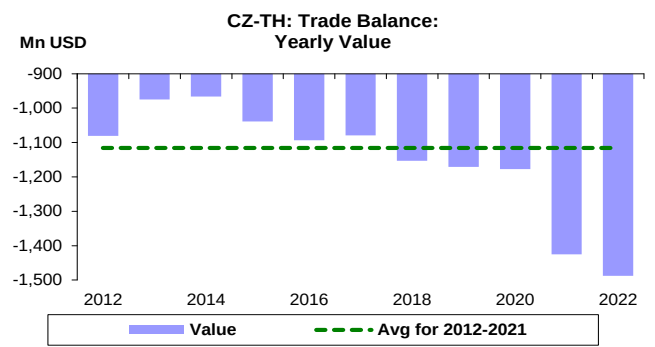
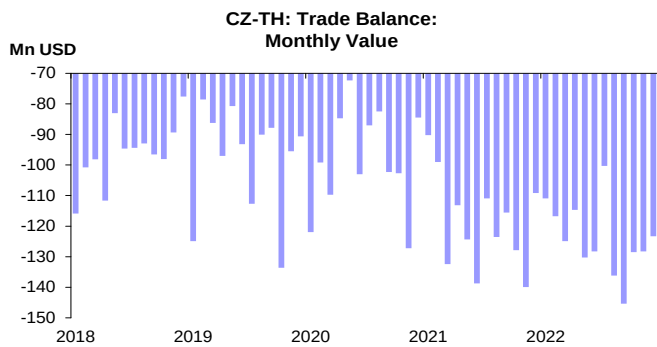






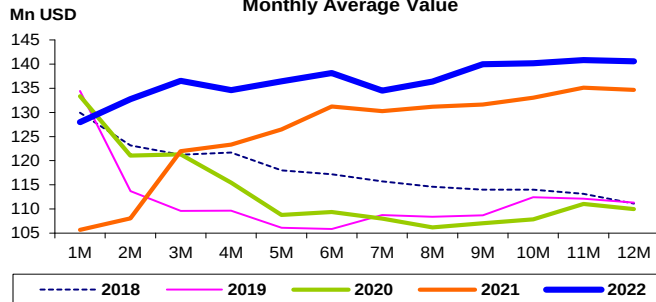




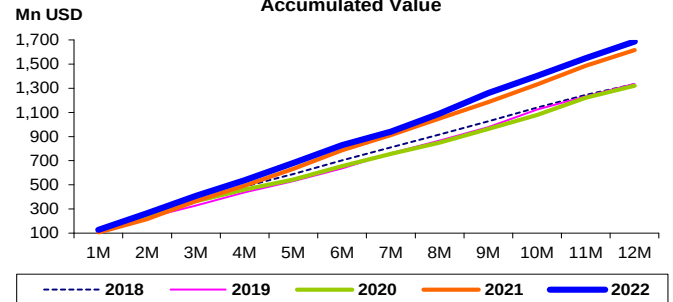




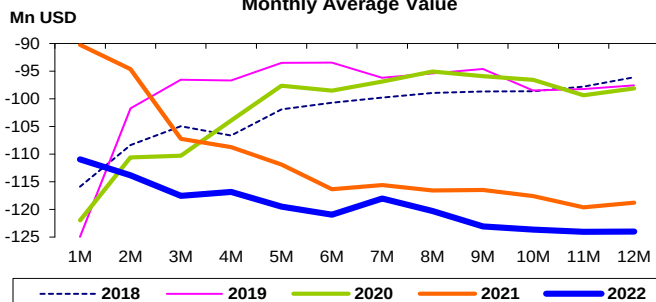
CZ-TH: Import of Goods:
Monthly Average Value



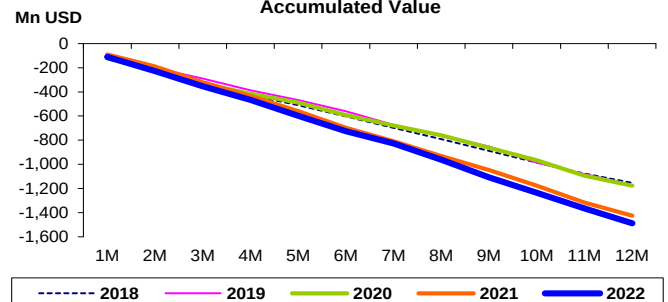
CZ-TH: Import of Goods:
Accumulated Value



CZ-TH: Trade Balance:
Monthly Average Value



CZ-TH: Trade Balance:
Accumulated Value



เครื่องชี้เศรษฐกิจสำคัญ

	2021	2022	2023f	2021				2022				2023			
				Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Nov	Dec	Jan	Feb
Real Sector															
Nominal GDP (SA, Bn USD)	281.9	290.5	314.7	68.3	71.3	72.2	70.1	74.6	72.5	71.3	72.0	-	-	-	-
Real GDP (SA, % YoY)	3.5	2.4	1.5	-1.9	9.1	3.8	3.5	4.7	3.5	1.5	0.2	-	-	-	-
- Private Consumption (SA, % YoY)	4.1	-0.9	-	-6.0	9.0	5.5	8.3	8.0	0.0	-5.2	-5.5	-	-	-	-
- Government Consumption (SA, % YoY)	1.4	0.7	-	1.1	1.1	3.4	-0.1	2.0	1.6	-1.9	0.9	-	-	-	-
- Investment (SA, % YoY)	0.8	6.2	-	-3.9	-0.2	3.3	4.1	7.0	6.0	7.2	4.6	-	-	-	-
Real GDP (SA, % QoQ)	-	-	-	-0.5	1.4	1.7	0.8	0.6	0.3	-0.3	-0.4	-	-	-	-
- Private Consumption (SA, % QoQ)	-	-	-	0.0	7.7	3.1	-2.4	-0.2	-0.4	-2.2	-2.8	-	-	-	-
- Government Consumption (SA, % QoQ)	-	-	-	-3.1	0.0	2.0	1.0	-1.1	-0.4	-1.4	3.9	-	-	-	-
- Investment (SA, % QoQ)	-	-	-	-0.41	1.4	1.7	1.4	2.4	0.4	2.9	-1.1	-	-	-	-
GDP Per Capita (USD)	26,805.6	28,094.6	29,856.4	-	-	-	-	-	-	-	-	-	-	-	-
Population (Mn Persons)	10.5	10.5	10.5	-	-	-	-	-	-	-	-	-	-	-	-
Labour Market															
Unemployment Rate (SA, %)	2.8	2.4	2.3	3.3	3.1	2.7	2.3	2.4	2.4	2.4	2.4	2.7	2.3	2.5	-
External Sector															
Export of Goods (Bn USD)	227.5	241.2	-	56.8	59.4	52.5	58.8	60.5	61.0	57.7	62.0	22.8	19.0	-	-
- % YoY	18.1	6.0	-	19.7	55.9	7.1	1.3	6.5	2.7	9.9	5.5	6.2	4.4	-	-
Import of Goods (Bn USD)	212.9	235.9	-	50.5	54.8	51.5	56.0	58.0	60.8	57.0	60.1	22.1	18.1	-	-
- % YoY	24.0	10.8	-	17.6	55.3	20.0	11.0	15.0	10.9	10.7	7.3	11.3	1.4	-	-
Trade Balance (Bn USD)	14.6	5.3	-	6.3	4.6	1.0	2.8	2.5	0.2	0.6	1.9	0.7	0.9	-	-
Current Account Balance (Bn USD)	-2.3	-15.8	-6.9	3.1	0.9	-3.9	-2.4	-0.6	-3.2	-8.6	-3.4	-1.6	-0.3	-	-
- % of GDP	-0.8	-5.4	-2.2	4.5	1.3	-5.4	-3.5	-0.8	-4.4	-12.1	-4.7	-	-	-	-
International Reserve (Bn USD)	173.6	140.0	-	163.6	167.1	169.2	173.6	173.7	154.6	132.6	140.0	137.2	140.0	142.7	135.3
External Debt (Bn USD)	203.7	-	-	193.5	197.3	198.3	203.7	210.9	192.5	172.4	-	-	-	-	-
- % of International Reserve	85.2	-	-	118.3	118.1	117.2	85.2	82.4	80.3	76.9	-	-	-	-	-
Number of Tourists (Mn Persons)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
- % YoY	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Tourism Revenue (Bn USD)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Government Sector															
Government Revenue (% YoY)	3.9	-	-	-0.3	16.7	7.4	3.9	11.3	10.6	10.3	-	-	-	-	-
Government Expenditure (% YoY)	-2.0	-	-	13.0	5.7	6.9	-2.0	1.1	5.5	12.2	-	-	-	-	-
Fiscal Balance (Bn USD)	16.7	-	-	-1.0	2.3	-0.3	16.7	7.4	3.9	11.3	-	-	-	-	-
- % of GDP	5.9	-	-	-1.5	3.2	-0.4	23.8	10.0	5.4	15.8	-	-	-	-	-
Government Debt (Bn USD)	165.3	-	-	170.3	165.9	155.9	165.3	163.7	166.6	-	-	-	-	-	-
- % of GDP	42.4	-	-	40.1	43.0	46.3	42.4	45.6	43.5	-	-	-	-	-	-
Inflation (% YoY)															
HICP	3.3	14.8	8.6	2.2	2.8	3.3	5.0	10.2	15.0	17.4	16.5	17.2	16.8	19.1	-
Financial Sector (Period End)															
Total Loans (Bn USD)	267.5	258.7	-	285.2	296.0	299.3	267.5	294.8	282.4	258.1	258.7	270.7	258.7	294.4	-
Total Loans (% YoY)	2.9	-8.7	-	11.2	18.6	11.5	2.9	3.3	-4.6	-13.8	-8.7	-29.0	-8.7	-14.1	-
Total Deposits (Bn USD)	237.8	249.3	-	260.7	272.4	268.1	237.8	265.1	266.1	255.6	249.3	268.7	249.3	291.4	-
Total Deposits (% YoY)	3.8	11.5	-	22.0	23.4	13.3	3.8	1.7	-2.3	-4.7	11.5	0.9	11.5	14.4	-
L/D Ratio (%)	112.5	103.8	-	109.4	108.7	111.6	112.5	111.2	106.1	101.0	103.8	100.7	103.8	101.0	-
Stock Market (Period End)															
PSE Index	1,426.0	1,201.7	-	1,090.5	1,152.9	1,324.9	1,426.0	1,367.3	1,251.8	1,123.4	1,201.7	1,215.3	1,201.7	1,329.7	1,413.7
Trade Value (Mn USD/Day)	26.0	14.6	-	25.6	26.1	27.2	26.0	49.1	29.7	25.8	14.6	21.3	14.6	22.5	-
Market Capitalization (Bn USD)	701.6	723.6	-	687.1	737.0	725.1	701.6	769.1	714.5	626.4	723.6	723.8	723.6	771.6	-
Interest Rate (% pa)															
Policy Rate (Discount Rate)	2.75	6.00	-	0.05	0.05	0.05	2.75	3.50	6.00	6.00	6.00	6.00	6.00	6.00	6.00
Repo Rate	3.75	7.00	-	0.25	0.50	0.75	3.75	4.50	7.00	7.00	7.00	7.00	7.00	7.00	7.00
Lombard Rate	4.75	8.00	-	1.00	1.25	1.75	4.75	5.50	8.00	8.00	8.00	8.00	8.00	8.00	8.00
Exchange Rate (Period Average)															
CZK/USD	21.67	23.36	-	21.60	21.27	21.63	22.16	22.70	23.13	24.40	23.94	23.91	22.92	22.25	22.13
CZK/EUR	25.66	24.54	-	25.61	25.51	25.41	24.58	24.69	24.57	24.31	23.64	24.34	24.12	23.79	23.50

Source: CEC and IMF

Note: 1. % YoY and % QoQ of all items except Export and Import are calculated in CZK term.

2. Total Loans and Deposits refer to licenced banks.

3. % of GDP is calculated from Nominal GDP.