

เศรษฐกิจใน Q3/2563

- GDP บรูไน Q3/63 ขยายตัวเพียง 0.5% YoY แต่หดตัว 2.7% QoQ หากพิจารณา 9M/63 ขยายตัว 1.9% YoY
- Q3/63 การส่งออกสินค้า มูลค่า 1.3 Bn USD หดตัว 12.5% YoY และ 16.5% QoQ การนำเข้าสินค้า มูลค่า 1.6 Bn USD ขยายตัวถึง 72.7% YoY และ 53.6% QoQ ส่งผลให้ดุลการค้า ขาดดุล 0.3 Bn USD เปลี่ยนสถานะจากที่เกินดุลในช่วงเดียวกันของปีก่อน และไตรมาสก่อน หากพิจารณา 11M/63 การส่งออกสินค้า มูลค่า 6.0 Bn USD หดตัว 3.5% YoY การนำเข้าสินค้า มูลค่า 4.8 Bn USD ขยายตัว 13.5% YoY ส่งผลให้ดุลการค้า เกินดุล 1.2 Bn USD เกินดุลลดลงเล็กน้อยจากช่วงเดียวกันของปีก่อน
- ดัชนีราคาผู้บริโภค (CPI) Q4/63 ขยายตัว 2.1% YoY และ 0.6% QoQ หากพิจารณา ปี 63 ขยายตัว 1.9% YoY

การประเมินอันดับค่า อิงค่าต่ำสุด ค่าเฉลี่ย และค่าสูงสุด (ปี 2552-64)

	All Periods			Same Periods			Latest
	Month	Quarter	Year	YTD	Quarter	Month	
GDP (BND) ¹	-	3	5	4	5	-	Sep-20
Private Consumption (BND) ¹	-	5	5	5	5	-	Sep-20
Government Consumption (BND) ¹	-	2	4	1	1	-	Sep-20
Investment (BND) ¹	-	5	4	3	3	-	Sep-20
Export of Goods Value (USD)	2	2	2	2	2	2	Nov-20
Import of Goods Value (USD)	4	3	5	5	4	5	Nov-20
Trade Balance (USD)	1	2	1	1	1	1	Nov-20
Current Account Balance (USD)	-	-	1	-	-	-	Dec-19
International Reserve (USD)	3	3	4	4	4	4	Oct-20
CPI ²	5	5	5	5	5	5	Dec-20
BND/USD	3	3	3	3	4	3	Feb-21

¹การประเมินอันดับค่า อิงค่าต่ำสุด ค่าเฉลี่ย และค่าสูงสุด (ปี 2556-63)

²การประเมินอันดับค่า อิงค่าต่ำสุด ค่าเฉลี่ย และค่าสูงสุด (ปี 2558-63)

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

อัตราการเปลี่ยนแปลงรายปี (ปี 2553-63)

%	Average YoY Growth	CAGR
GDP (BND) ¹	0.0	0.0
Private Consumption (BND) ¹	2.2	2.1
Government Consumption (BND) ¹	0.4	0.3
Investment (BND) ¹	-0.7	-2.5
Export of Goods Value (USD) ²	0.4	-2.3
Import of Goods Value (USD) ²	9.7	8.1
CPI ³	-0.2	-0.2
BND/USD	-0.6	0.0

¹ข้อมูลปี 2556-62

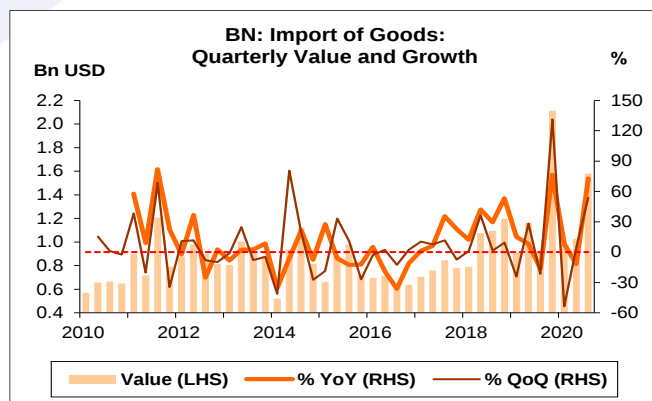
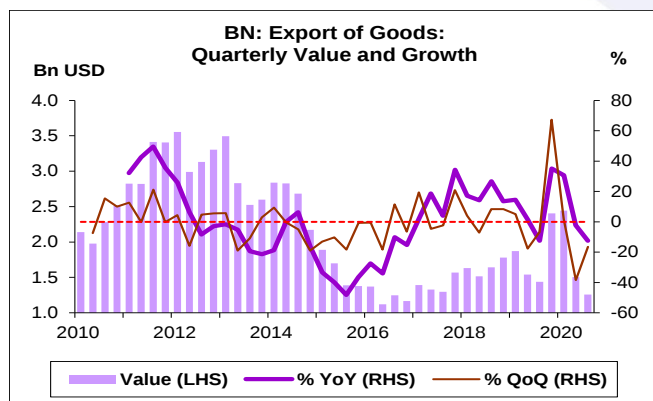
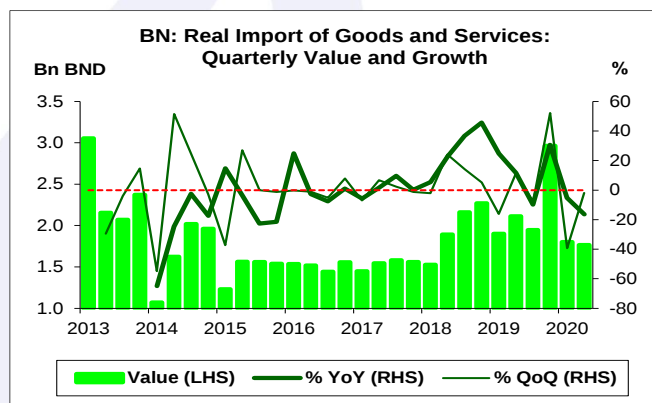
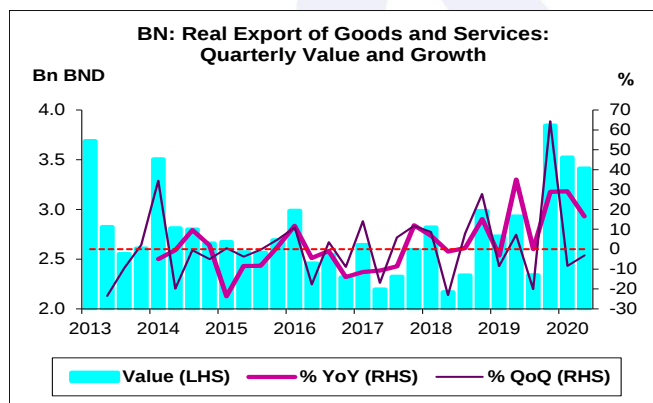
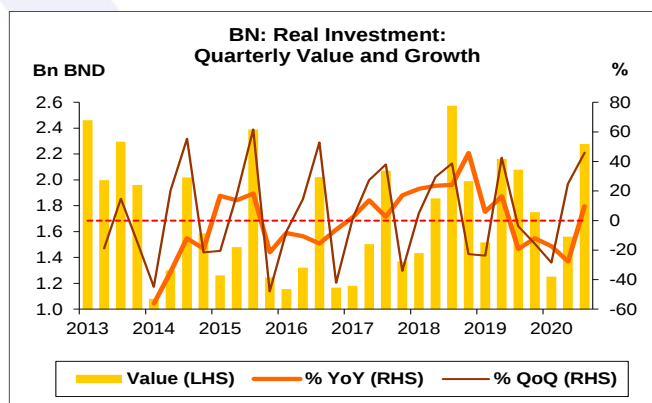
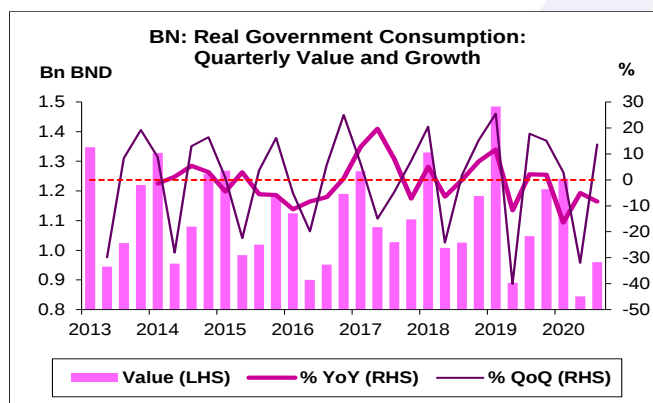
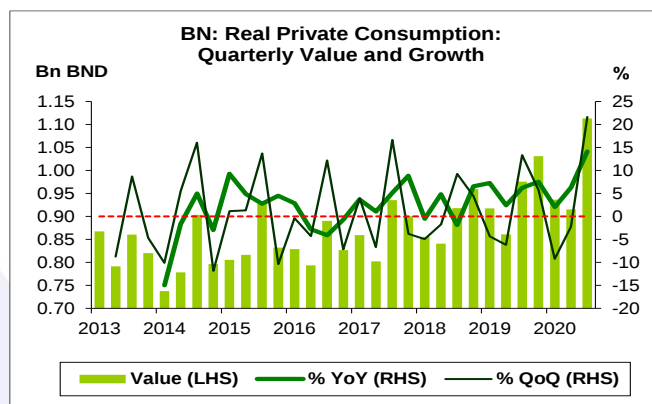
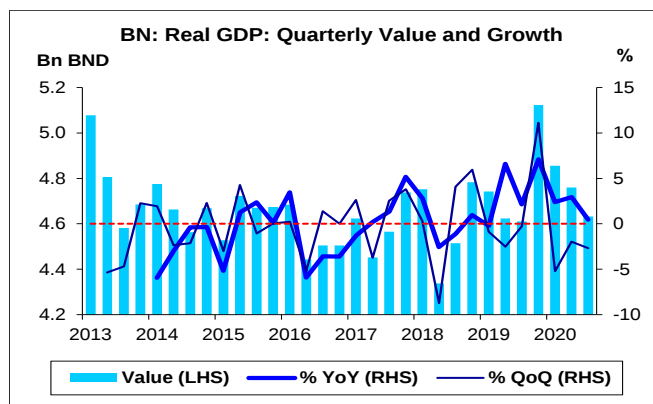
²ข้อมูลปี 2553-62

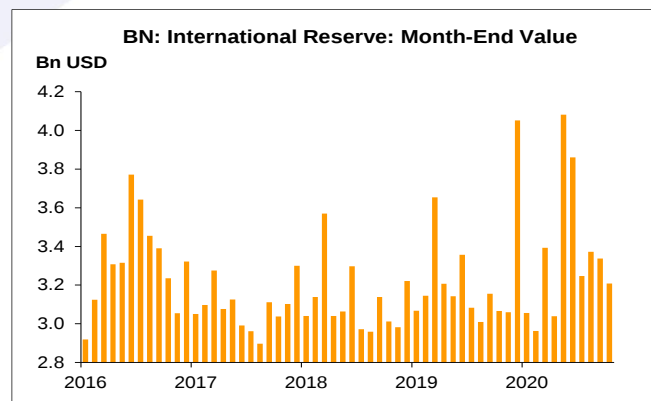
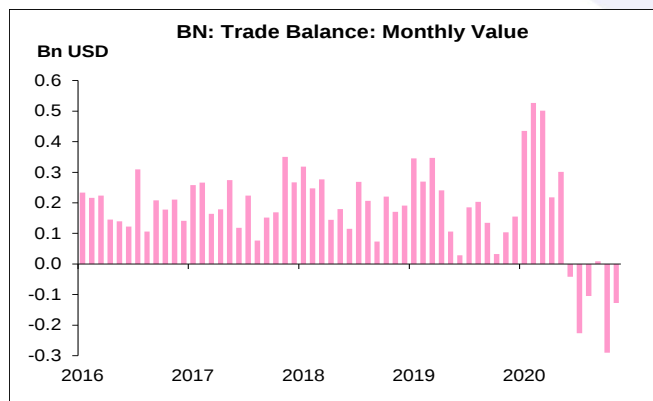
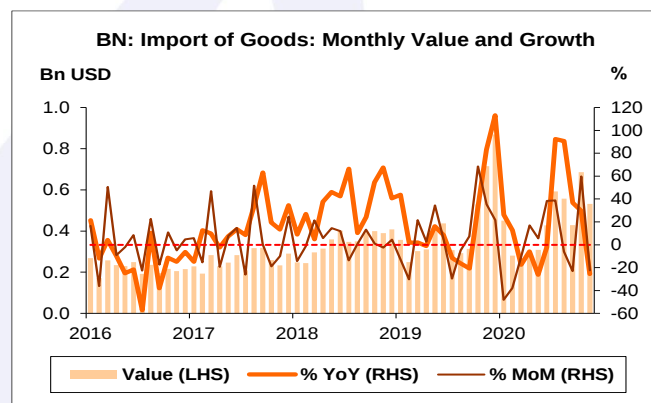
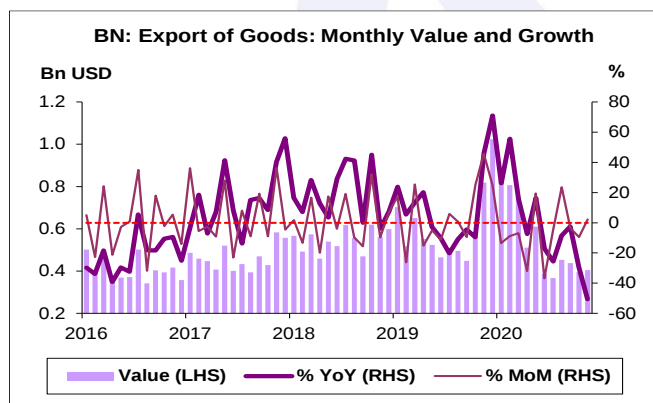
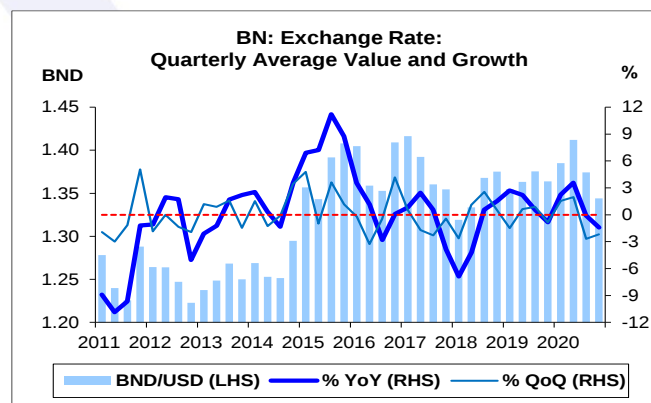
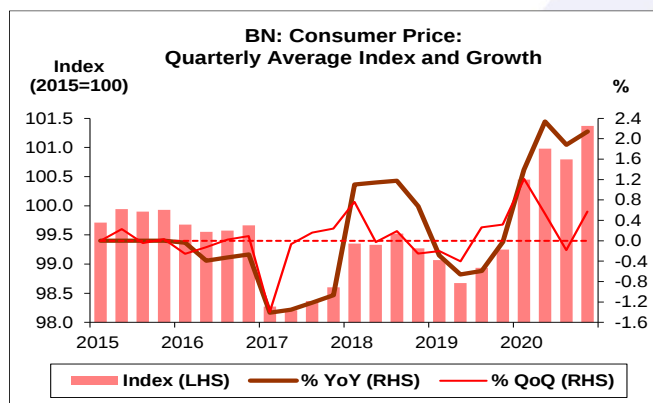
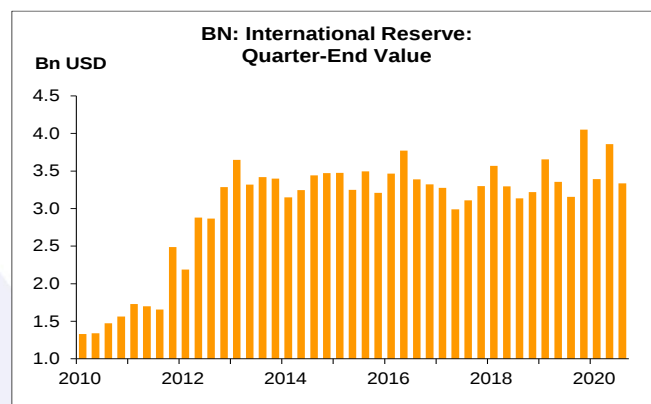
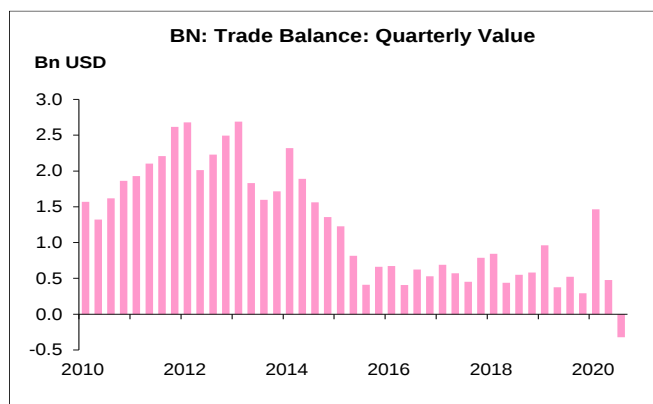
³ข้อมูลปี 2558-62

ที่มา: CEIC และ IMF

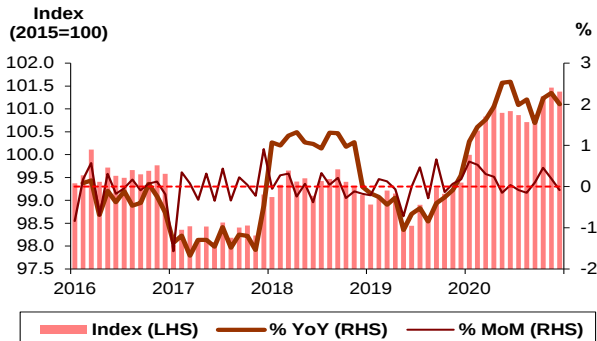
หมายเหตุ: 1. CAGR คือ Compound Annual Growth Rate

2. GDP หมายถึง GDP ตามราคาคงที่

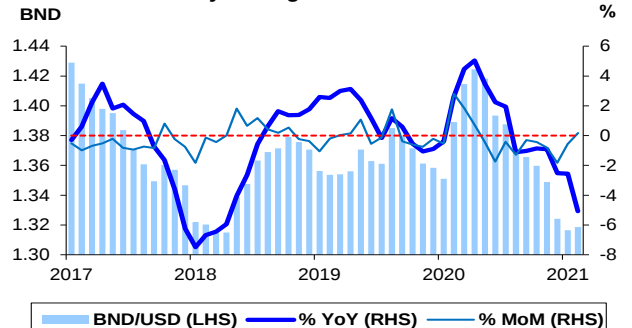




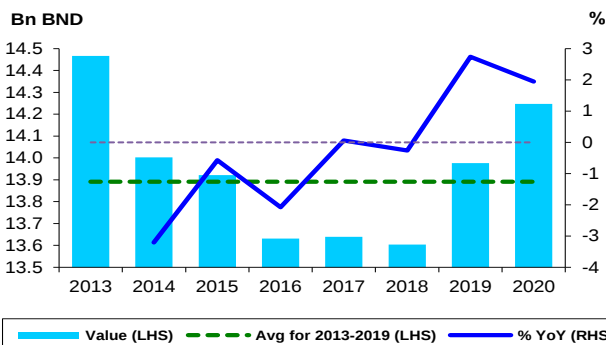
BN: Consumer Price: Monthly Index and Growth



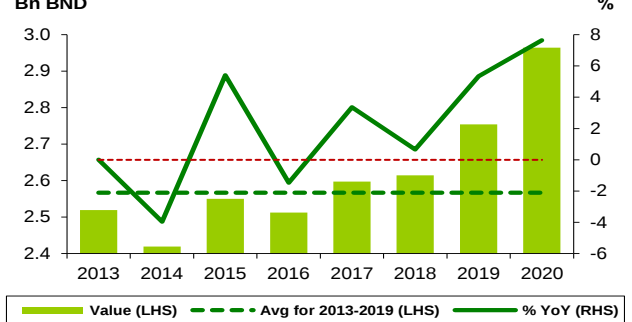
BN: Exchange Rate: Monthly Average Value and Growth



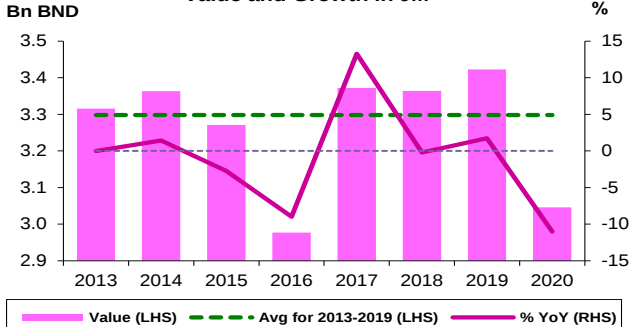
BN: Real GDP: Value and Growth in 9M



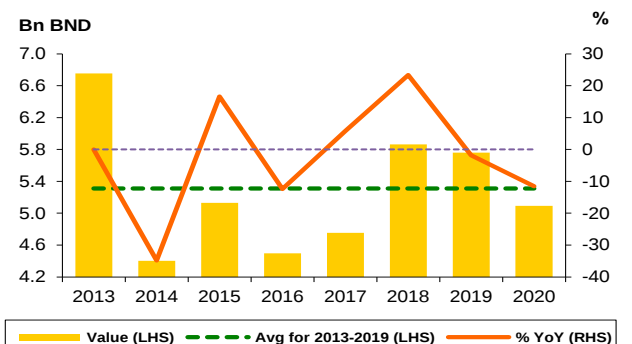
BN: Real Private Consumption: Value and Growth in 9M



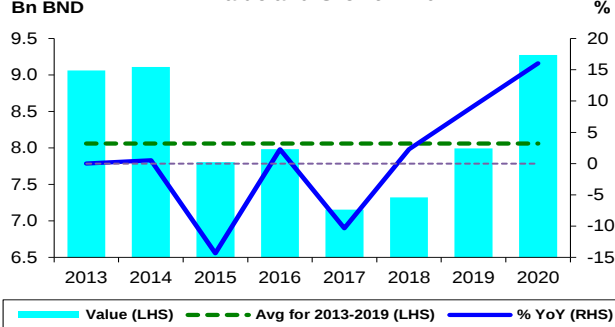
BN: Real Government Consumption: Value and Growth in 9M



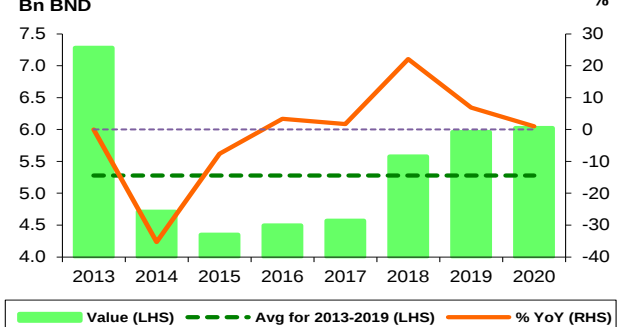
BN: Real Investment: Value and Growth in 9M



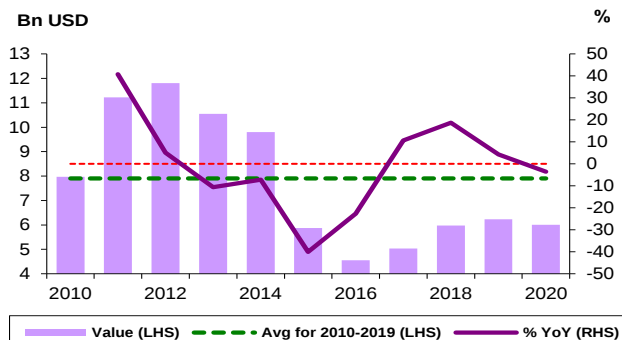
BN: Real Export of Goods and Services: Value and Growth in 9M



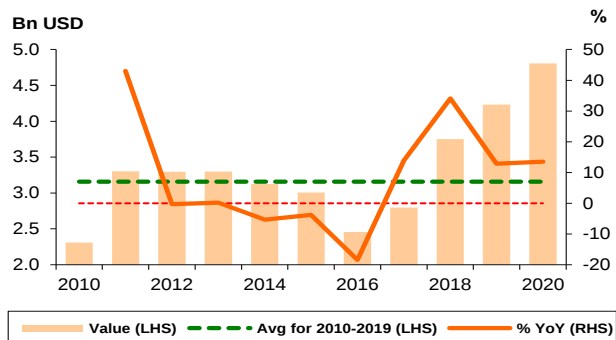
BN: Real Import of Goods and Services: Value and Growth in 9M



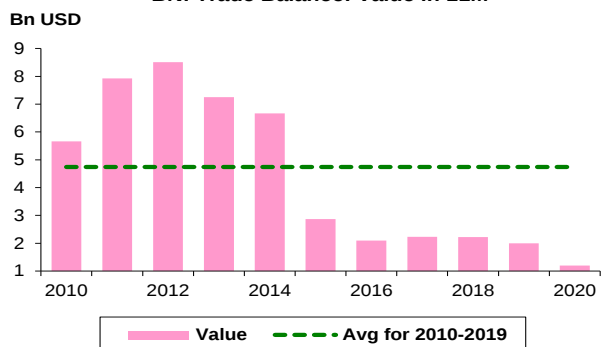
BN: Export of Goods: Value and Growth in 11M



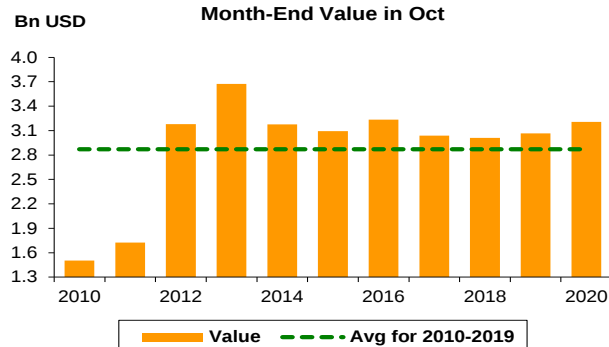
BN: Import of Goods: Value and Growth in 11M



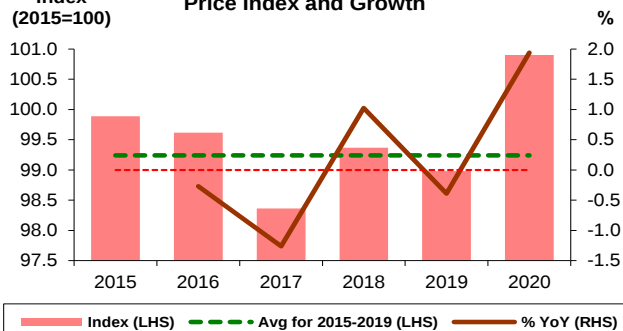
BN: Trade Balance: Value in 11M



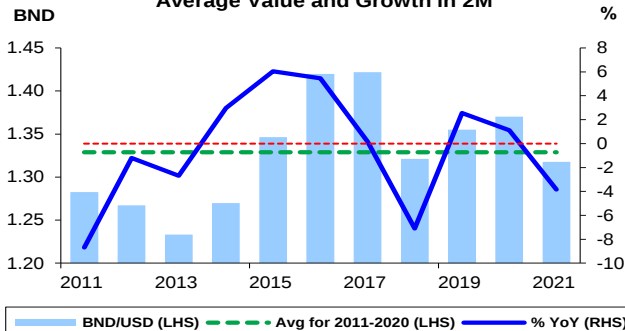
BN: International Reserve: Month-End Value in Oct



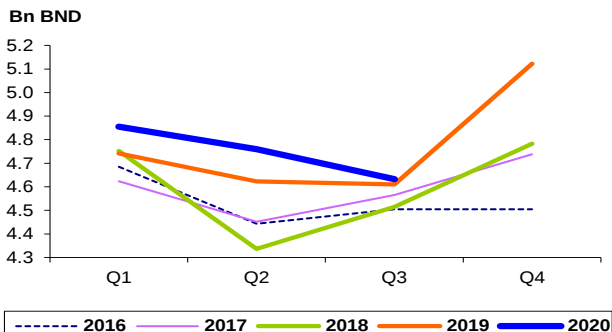
BN: Yearly Average Consumer Price Index and Growth



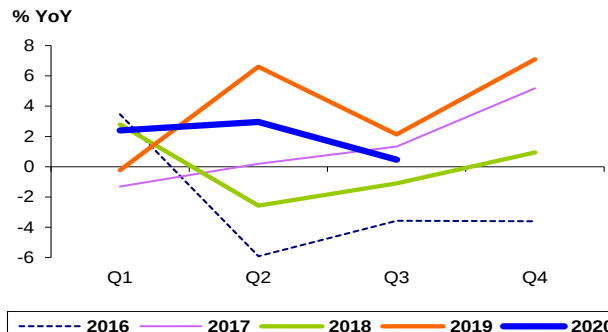
BN: Exchange Rate: Average Value and Growth in 2M



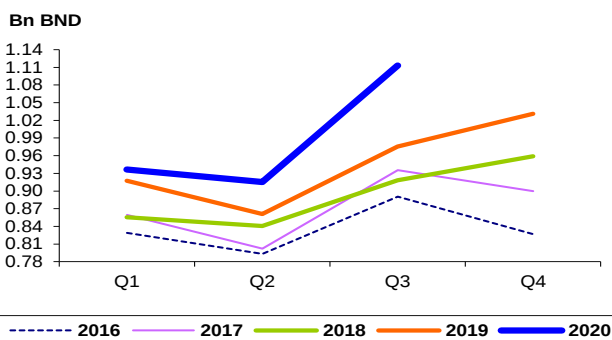
BN: Real GDP: Quarterly Value



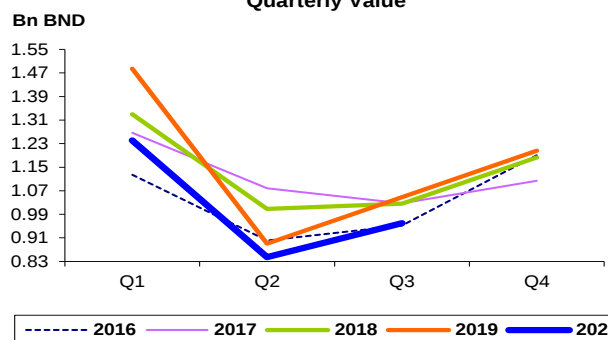
BN: Real GDP: Quarterly Growth



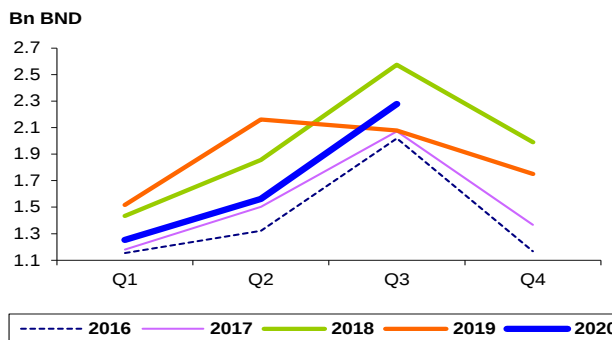
BN: Real Private Consumption: Quarterly Value



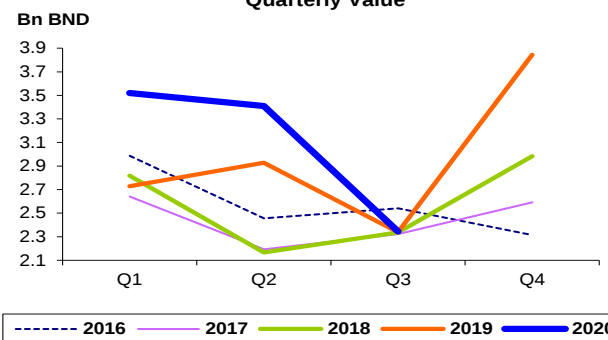
BN: Real Government Consumption: Quarterly Value



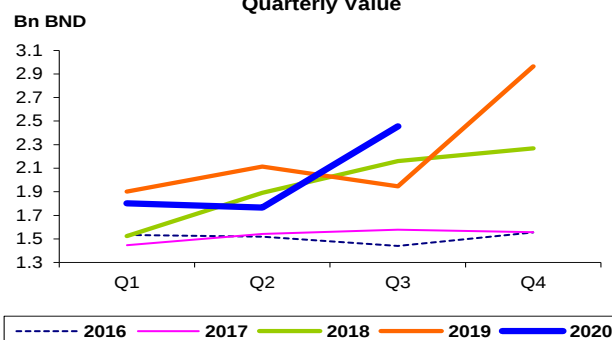
BN: Real Investment: Quarterly Value



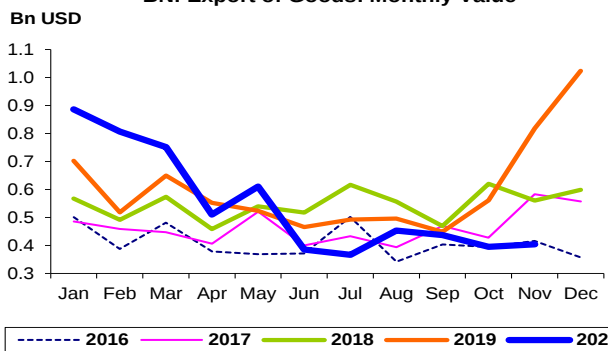
BN: Real Export of Goods and Services: Quarterly Value

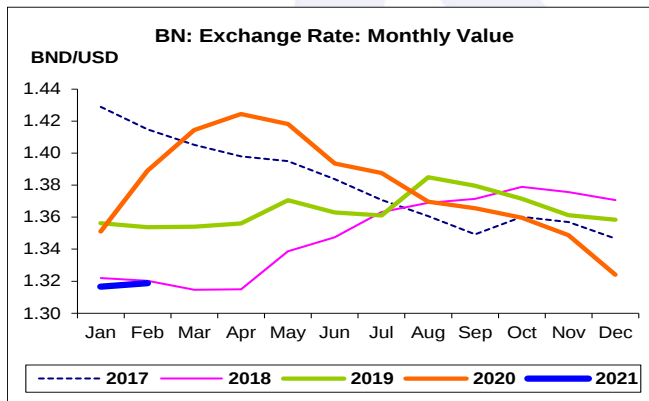
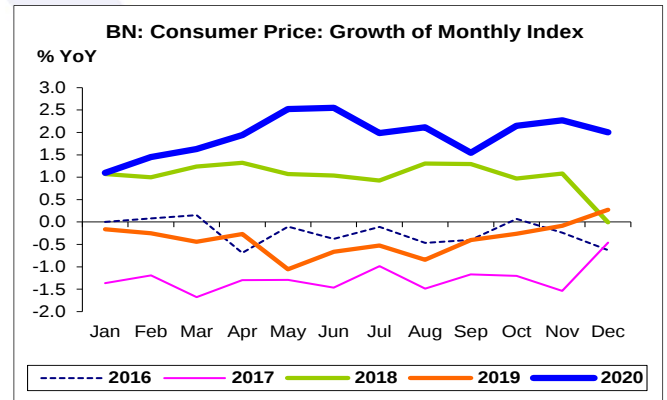
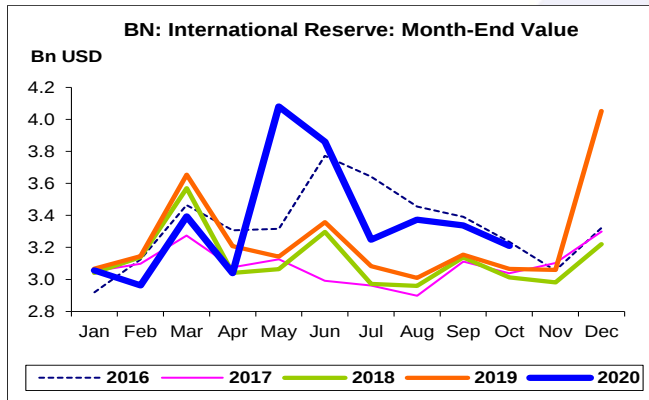
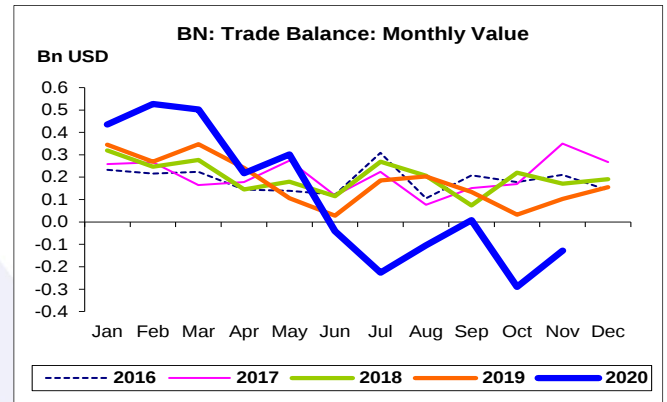
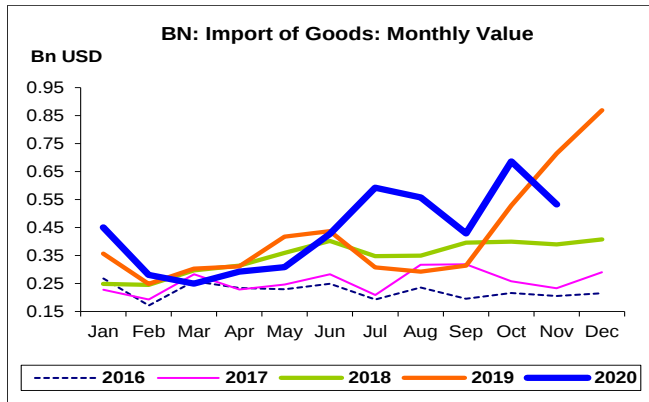


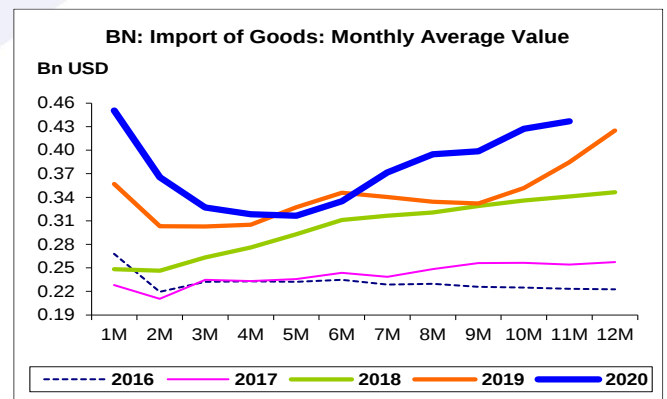
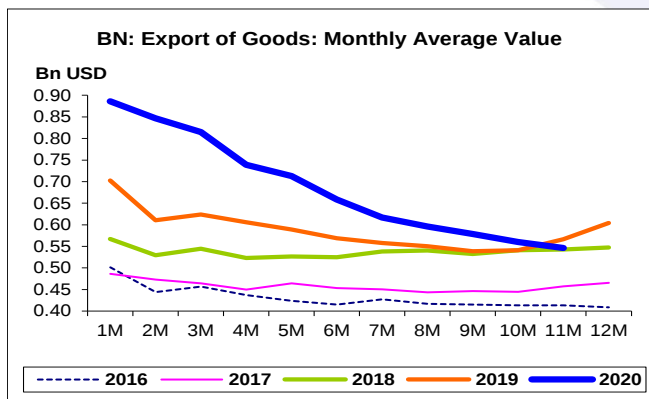
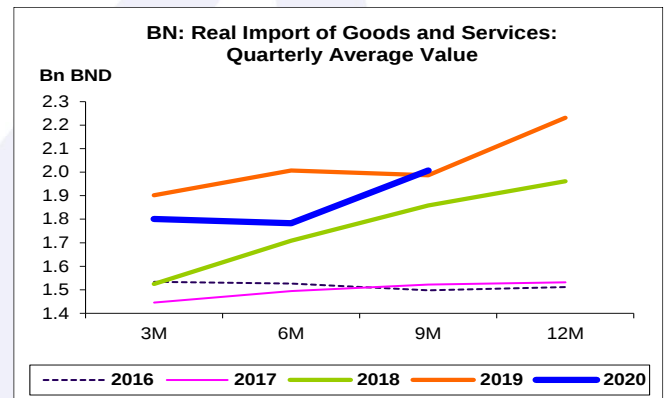
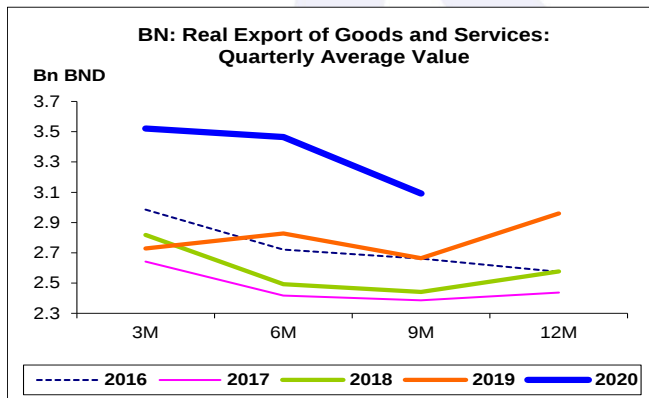
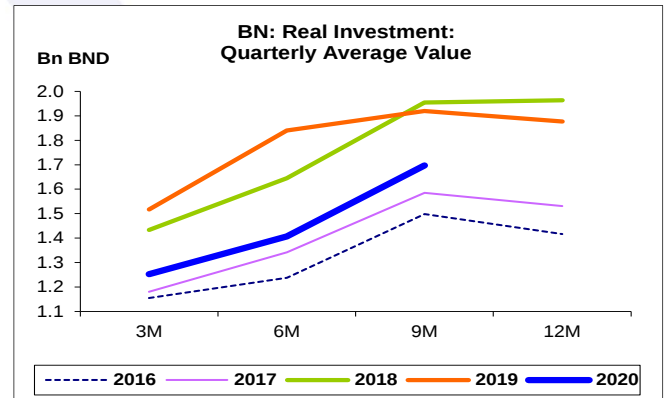
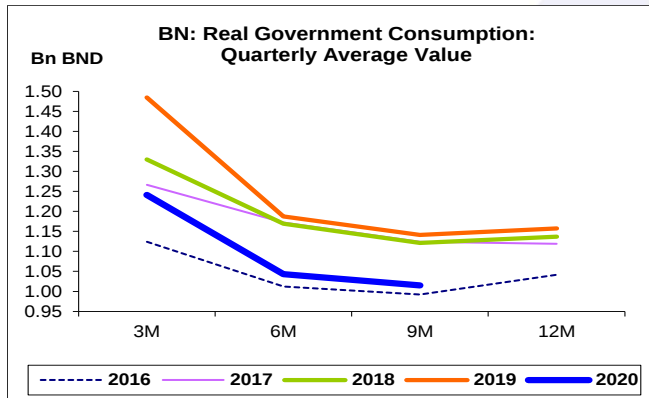
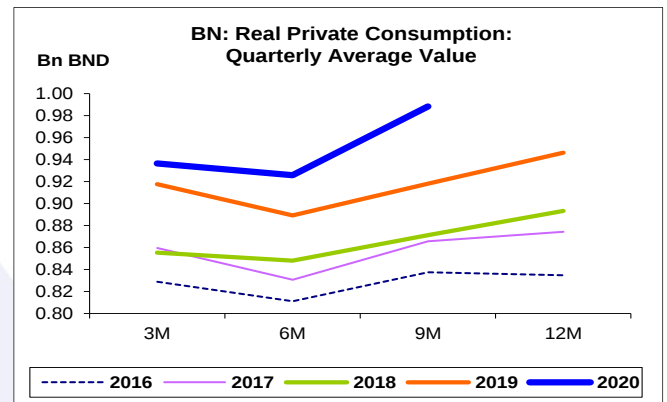
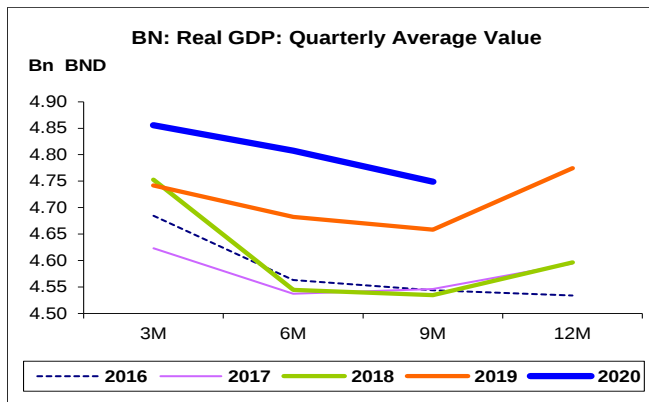
BN: Real Import of Goods and Services: Quarterly Value



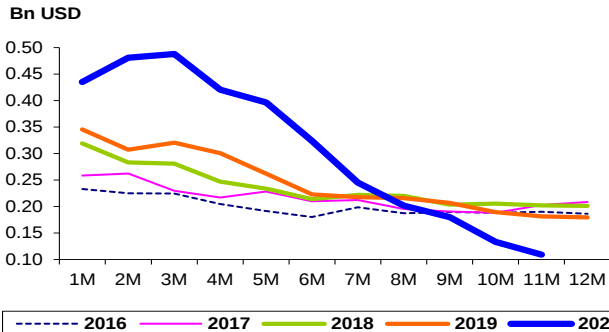
BN: Export of Goods: Monthly Value



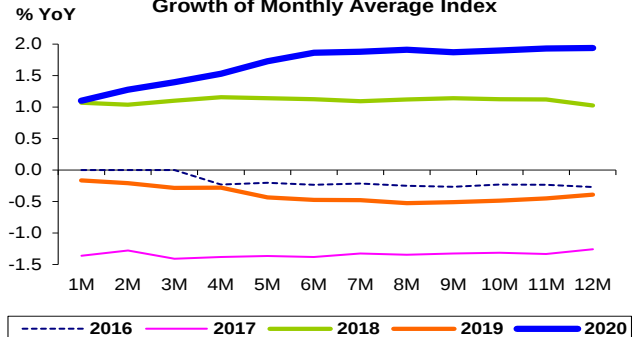




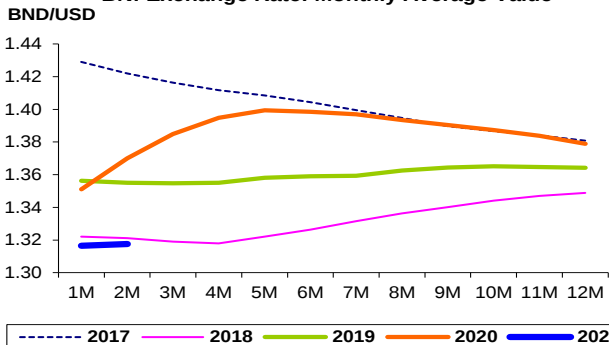
BN: Trade Balance: Monthly Average Value



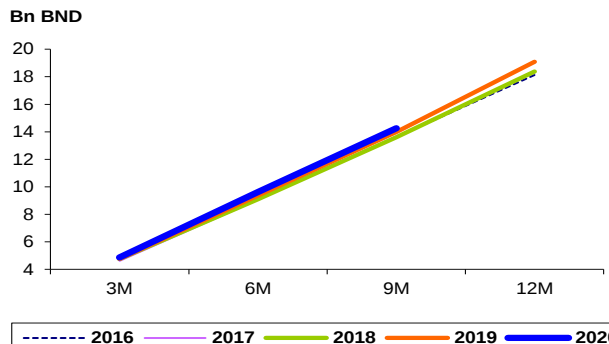
BN: Consumer Price: Growth of Monthly Average Index



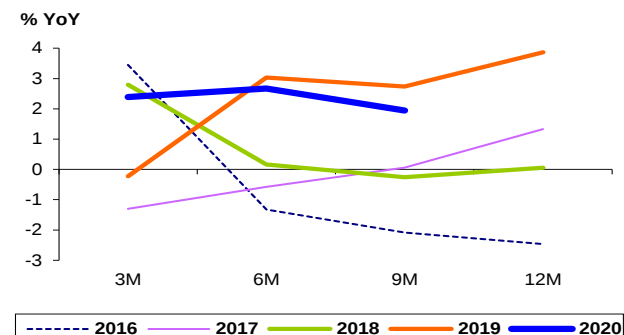
BN: Exchange Rate: Monthly Average Value



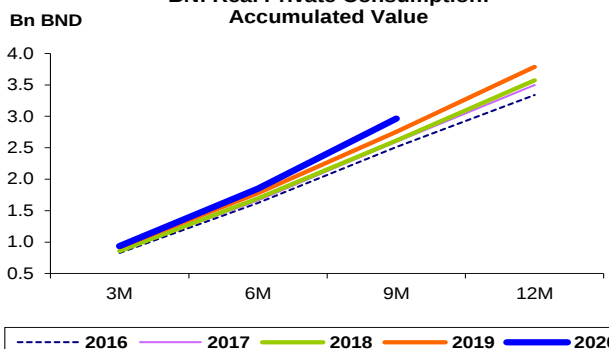
BN: Real GDP: Accumulated Value



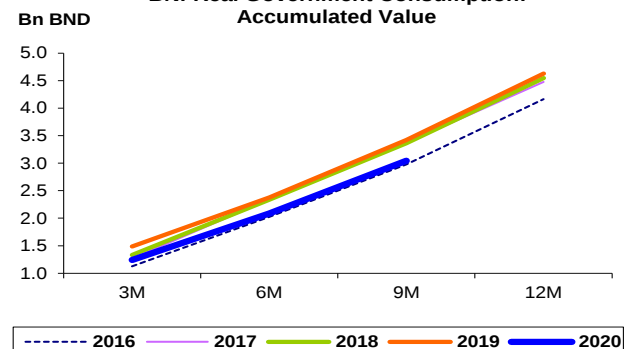
BN: Real GDP: Growth

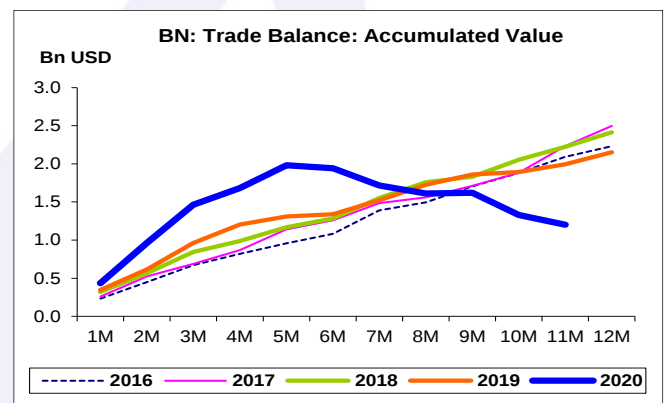
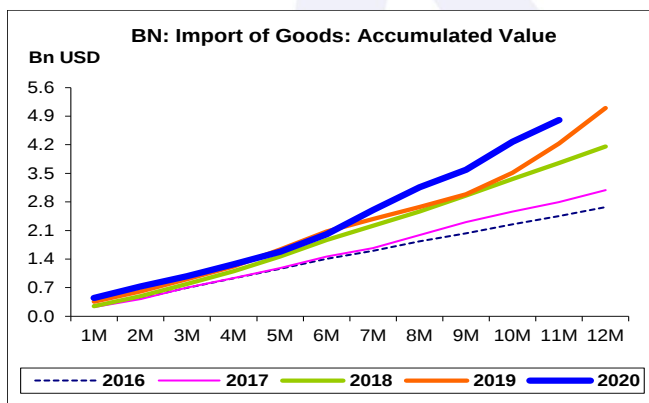
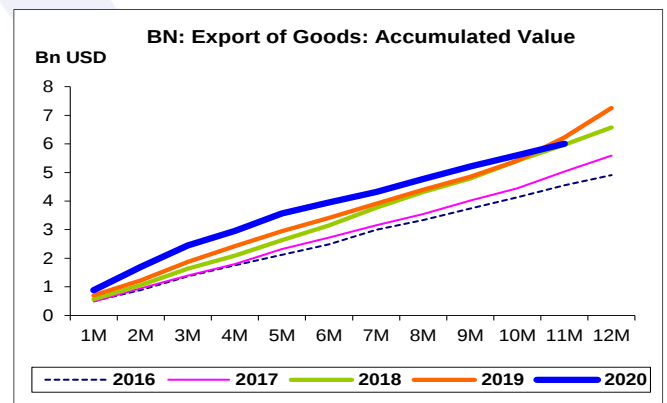
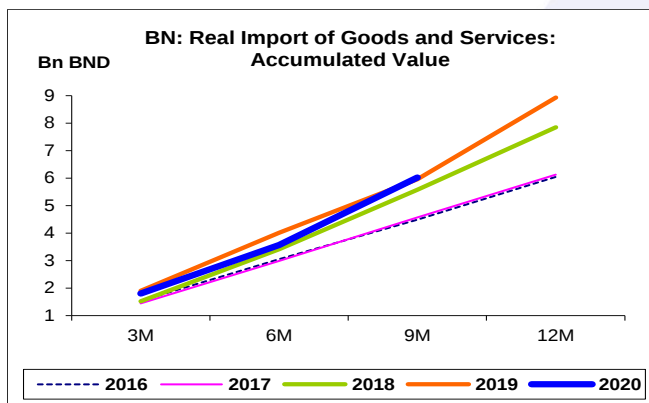
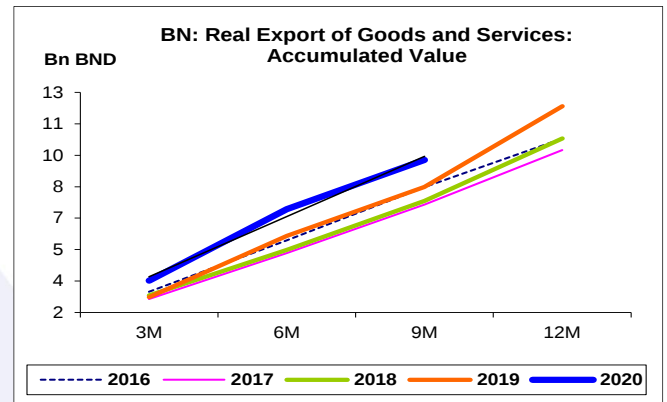
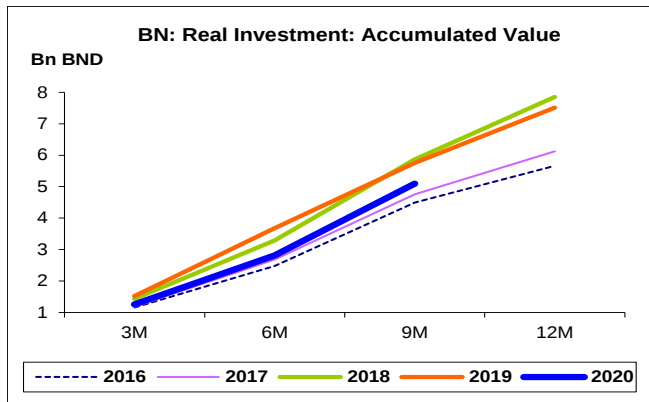


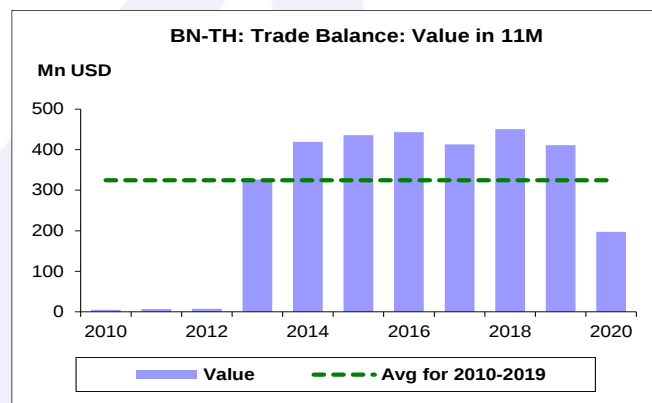
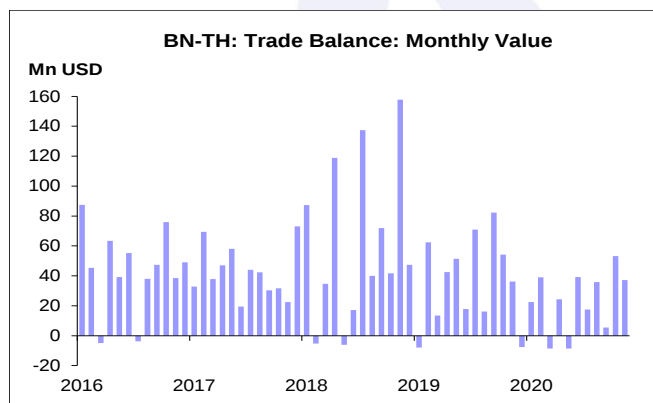
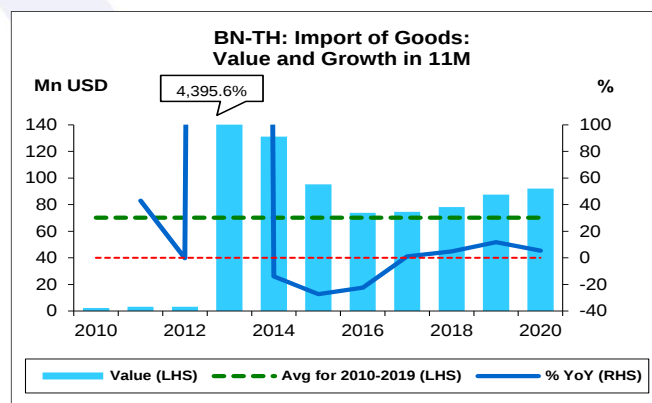
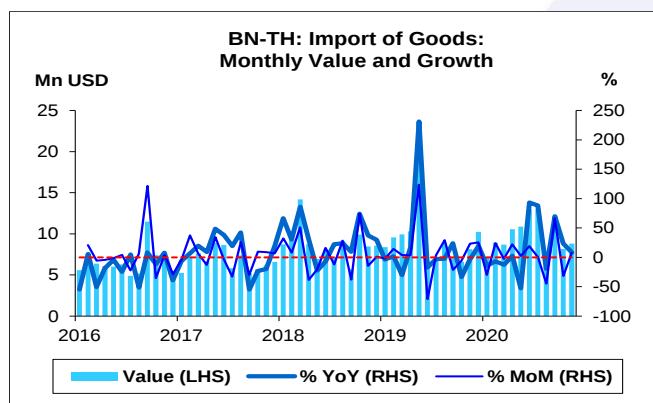
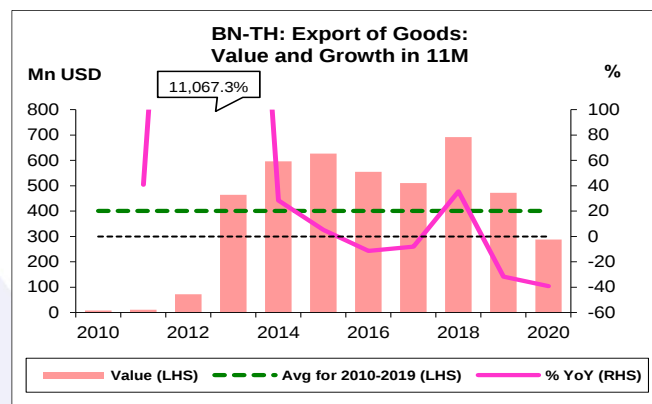
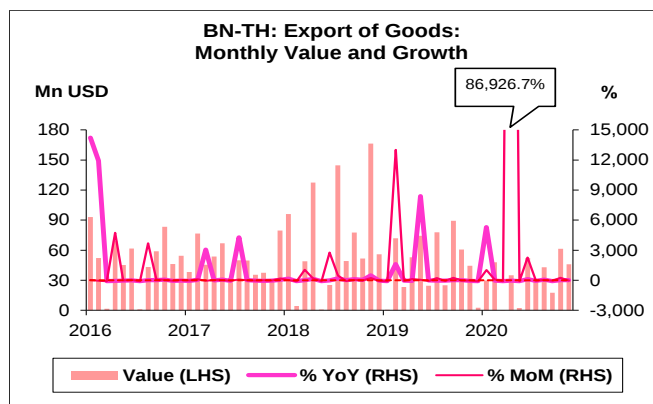
BN: Real Private Consumption: Accumulated Value

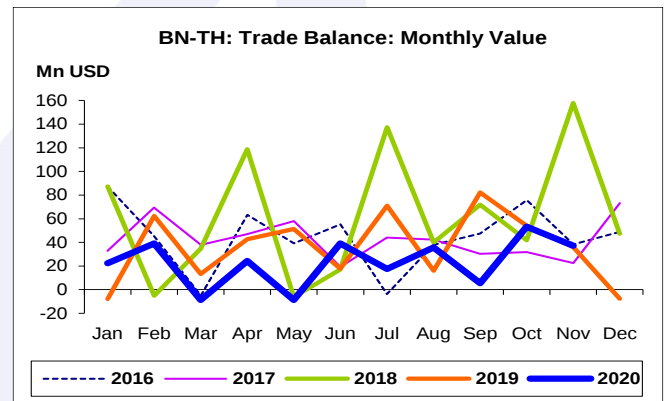
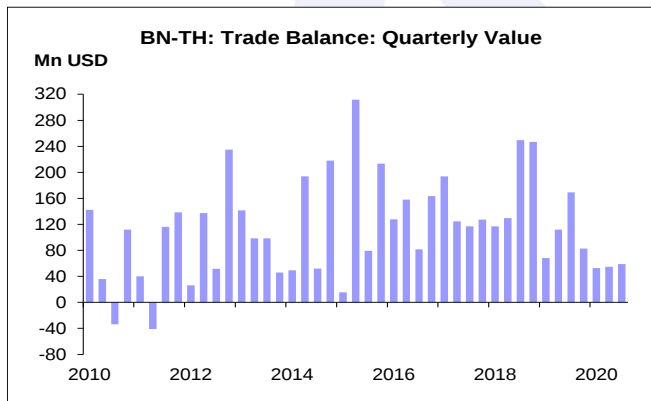
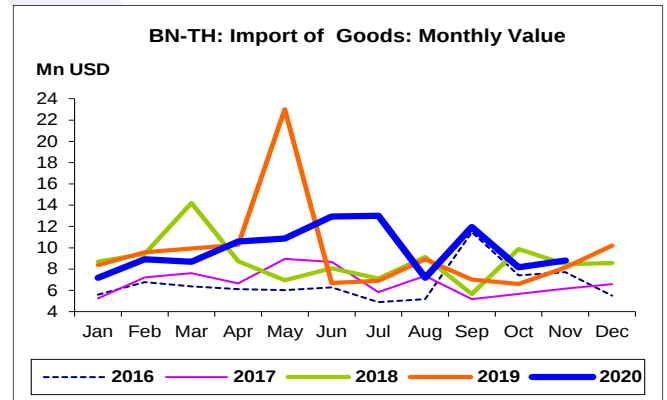
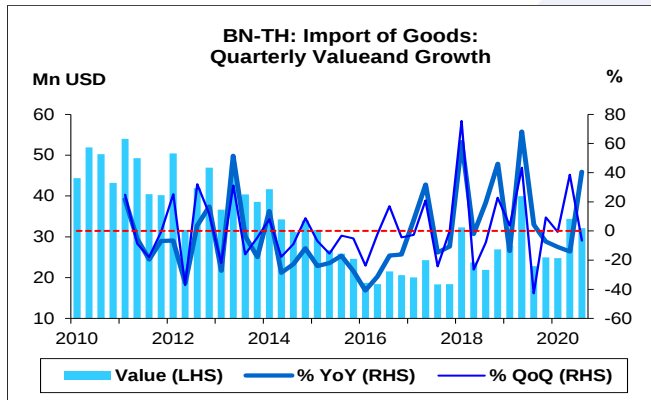
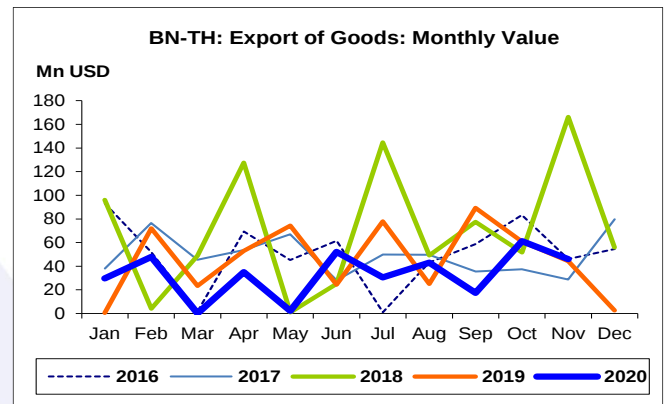
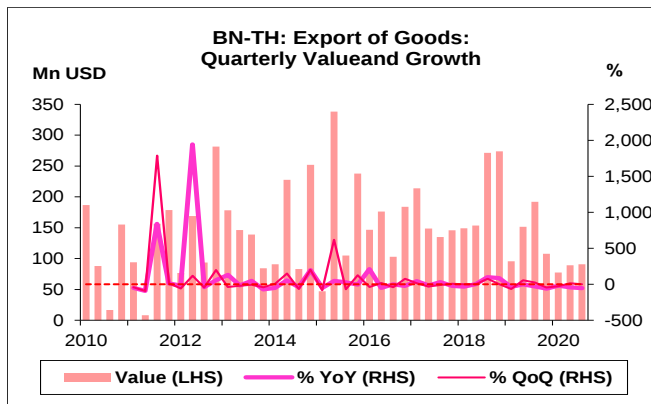


BN: Real Government Consumption: Accumulated Value

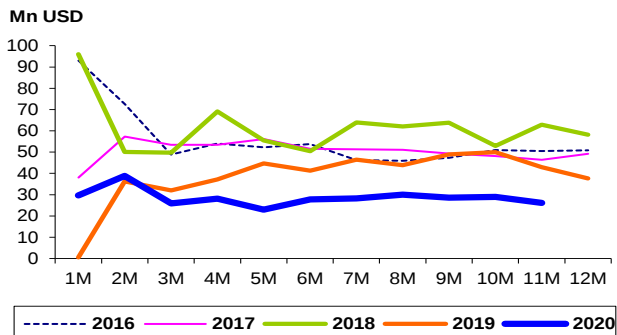




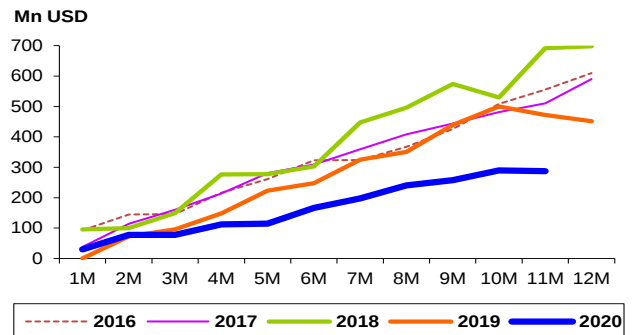




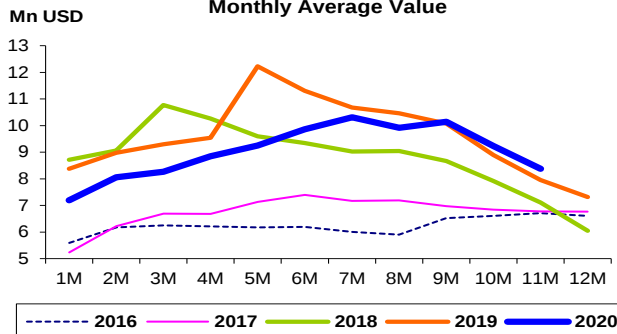
BN-TH: Export of Goods: Monthly Average Value



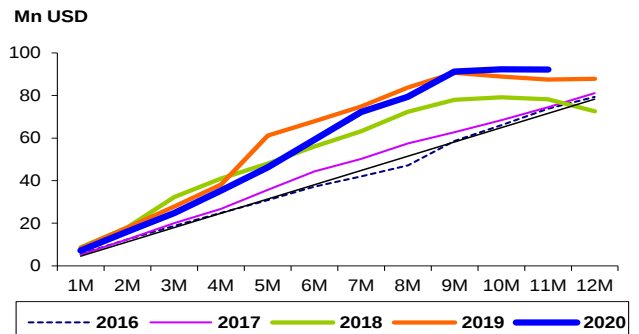
BN-TH: Export of Goods: Accumulated Value



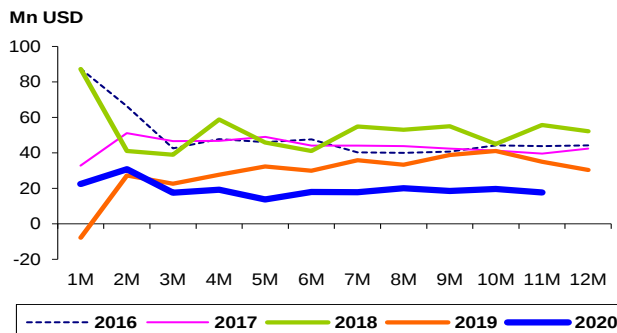
BN-TH: Import of Goods Value: Monthly Average Value



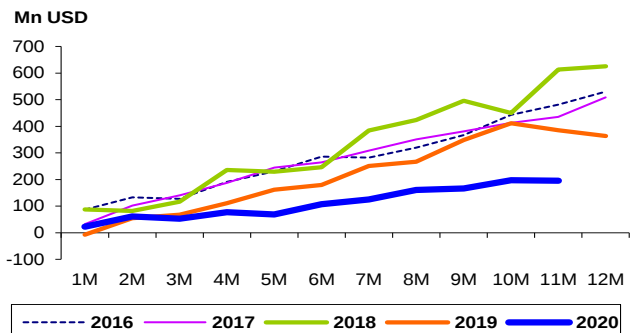
BN-TH: Import of Goods: Accumulated Value



BN-TH: Trade Balance: Monthly Average Value



BN-TH: Trade Balance: Accumulated Value



เครื่องใช้เศรษฐกิจสำคัญ

	2019	2020f	2021f	2019				2020						2021	
				Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Nov	Dec	Jan	Feb
Real Sector															
Nominal GDP (Bn USD)	19.1	19.1	19.7	4.7	4.6	4.6	5.1	4.9	4.8	4.6	-	-	-	-	-
Real GDP (% YoY)	3.9	0.1	3.2	-0.2	6.6	2.1	7.1	2.4	3.0	0.5	-	-	-	-	-
- Private Consumption (% YoY)	5.9	-	-	7.3	2.4	6.3	7.5	2.1	6.3	14.1	-	-	-	-	-
- Government Consumption (% YoY)	1.8	-	-	11.7	-11.7	2.1	2.0	-16.4	-5.1	-8.4	-	-	-	-	-
- Investment (% YoY)	-4.4	-	-	5.9	16.4	-19.3	-12.0	-17.5	-27.8	9.6	-	-	-	-	-
Real GDP (% QoQ)	-	-	-	-0.9	-2.5	-0.3	11.1	-5.2	-2.0	-2.7	-	-	-	-	-
- Private Consumption (% QoQ)	-	-	-	-4.3	-6.2	13.3	5.7	-9.2	-2.3	21.6	-	-	-	-	-
- Government Consumption (% QoQ)	-	-	-	25.5	-40.1	17.7	15.1	2.9	-31.9	13.7	-	-	-	-	-
- Investment (% QoQ)	-	-	-	-23.8	42.5	-3.8	-15.8	-28.5	24.7	45.8	-	-	-	-	-
GDP Per Capita (USD)	30,290.1	32,031.3	35,589.5	-	-	-	-	-	-	-	-	-	-	-	-
Population (Mn Persons)	0.4	0.5	0.5	-	-	-	-	-	-	-	-	-	-	-	-
Labour Market															
Unemployment Rate (%)	9.0	6.8	6.8	-	-	-	-	-	-	-	-	-	-	-	-
External Sector															
Export of Goods (Bn USD)	7.3	-	1.4	1.9	1.5	1.4	2.4	2.4	1.5	1.3	-	0.4	-	-	-
- % YoY	10.4	-	-27.5	14.6	1.7	-12.6	35.0	30.7	-2.3	-12.5	-	-50.6	-	-	-
Import of Goods (Bn USD)	5.1	-	0.7	0.9	1.2	0.9	2.1	1.0	1.0	1.6	-	0.5	-	-	-
- % YoY	22.7	-	5.2	15.0	8.3	-16.4	76.4	7.9	-11.8	72.7	-	-25.6	-	-	-
Trade Balance (Bn USD)	2.2	-	0.7	1.0	0.4	0.5	0.3	1.5	0.5	-0.3	-	-0.1	-	-	-
Current Account Balance (Bn USD)	0.9	0.3	0.5	-	-	-	-	-	-	-	-	-	-	-	-
- % of GDP	17.1	3.2	2.8	-	-	-	-	-	-	-	-	-	-	-	-
International Reserve (Bn USD)	4.1	-	3.5	3.7	3.4	3.2	4.1	3.4	3.9	3.3	-	-	-	-	-
External Debt (Bn USD)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
- % of International Reserve	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Number of Tourists (Mn Persons)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
- % YoY	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Government Sector															
Government Revenue (% YoY)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Government Expenditure (% YoY)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Fiscal Balance (Bn USD)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
- % of GDP	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Government Debt (Bn USD)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
- % of GDP	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Inflation (% YoY)															
CPI	-0.4	1.9*	0.5	-0.3	-0.7	-0.6	0.0	1.4	2.3	1.9	2.1	2.3	2.0	-	-
Core CPI	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
PPI	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Financial Sector (Period End)															
Total Loans (Bn USD)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Loans (% YoY)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Deposits (Bn USD)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Deposits (% YoY)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
L/D Ratio (%)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Stock Market (Period End)															
Trade Value (Mn USD/Day)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Market Capitalization (Bn USD)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Bond Market (Period Average, % pa)															
S/T Government Bond Yield	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
L/T Government Bond Yield	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Interest Rate (Period End, % pa)															
BAB	5.50	5.50*	-	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50
Exchange Rate (Period Average)															
BND/USD	1.3642	1.3789*	-	1.3547	1.3632	1.3753	1.3637	1.3849	1.4121	1.3743	1.3442	1.3488	1.3241	1.3165	1.3187
BND/EUR	1.5631	1.5670*	-	1.5024	1.5259	1.5800	1.5259	1.5409	1.5663	1.5834	1.5775	1.5667	1.5931	1.5867	1.5789

Source: CEIC and IMF.

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

2. Total loans and deposits refer to licenced banks.

3. % of GDP is calculated from Nominal GDP.

* Actual Figure