



สภาวะเศรษฐกิจปัจจุบัน

บรรยายโดย หม่อมราชวงศ์ปรีดิยาธร เทวกุล

	2007	2008				
	Q4	Q1	Q2	Q3	Q4	Latest
GDP Growth (%Δ YoY)		2.5	2.1	0.7	-0.8	
GDP Growth (%Δ QoQ)		0.9	2.8	-0.5	-1.4	
Dow Jones Index (end of period)	13,264	12,262	11,350	10,850	8,776	7,762 (1 Apr 09)
Unemployment rate (%)	4.8	4.9	5.3	6.0	6.9	8.1 (Feb 09)
IP (%Δ YoY)	2.2	1.9	0.2	-2.7	-6.6	-11.8 (Feb 09)
PMI (ISM)	49.6	49.2	49.5	47.8	36.1	35.8 (Feb 09)



	2007	2008				
	Q4	Q1	Q2	Q3	Q4	Latest
GDP Growth (% Δ YoY)		2.1	1.4	0.6	-1.3	
GDP Growth (% Δ QoQ)		0.7	-0.2	-0.2	-1.5	
Unemployment rate (%)	7.2	7.2	7.4	7.5	8.0	8.2 (Jan 09)
IP (% Δ YoY)	3.0	2.5	1.2	-1.6	-9.1	-17.1 (Jan 09)
PMI (Manu)	52.3	52.4	50.2	46.6	36.9	33.9 (Mar 09)



	2007	2008				
	Q4	Q1	Q2	Q3	Q4	Latest
GDP Growth (%Δ YoY)		1.4	0.7	-0.1	-0.8	
GDP Growth (%Δ QoQ)		0.6	-0.9	-0.1	-3.2	
Nikkei (end of period)	15,307	12,525	13,481	11,259	8,860	8,352 (1 Apr 09)
Unemployment rate (%)	3.8	3.8	4	4.1	4.0	4.4 (Feb 09)
IP (%Δ YoY)	2.7	2.5	1.1	-1.9	-14.8	-30.8 (Jan 09)
PMI (ISM)	19	11	5	-3	-24.0	-24.0 (Dec 08)

Growth of Export Value					
	Q1	Q2	Q3	Q4	Feb
	YoY	YoY	YoY	YoY	YoY
JP	20.5	17.6	13.0	-9.9	-40.9
TW	17.6	18.6	8.1	-24.7	-28.6
SG	21.2	26.4	21.2	-13.9	-29.1
KR	17.4	23.1	27.1	-9.5	-17.1
MY	9.9	20.8	16.8	-13.0	-35.2 (Jan)
HK	10.7	8.1	5.6	-1.8	-22.6
TH	22.9	26.3	25.5	-9.4	-11.1
ASEAN 5	21.1	25.7	21.5	-11.9	-35.6 (Jan)
CN	21.2	22.2	23.1	4.3	-25.7

GDP Growth	2008			
	Q1	Q2	Q3	Q4
	YoY	YoY	YoY	YoY
US	2.5	2.1	0.7	-0.8
EU	2.1	1.4	0.6	-1.3
JP	1.4	0.7	-0.5	-4.3
TW	6.3	4.3	-1.0	-8.4
HK	7.3	4.2	1.7	-2.5
MY	7.4	6.7	4.7	0.1
SG	6.9	2.2	-0.1	-4.2
KR	5.8	4.8	3.8	-3.4
TH	6.0	5.3	4.0	-4.3
CN	10.6	10.1	9.0	6.8

GDP Growth	2008			
	Q1	Q2	Q3	Q4 (Annualized)
	QoQ	QoQ	QoQ	QoQ
US	0.9	2.8	-0.5	-5.5
EU	0.7	-0.2	-0.2	-6.4
JP	0.6	-0.9	-0.1	-12.7
TW	-3.1	-1.6	1.6	-22.5
HK	2.0	-1.4	-0.5	-8.0
MY	-1.5	2.3	3.1	-14.5
SG	3.7	-1.4	-1.7	-16.4
KR	0.8	0.8	0.5	-20.8
TH	1.2	0.8	0.6	-24.6
CN	n.a.	n.a.	6.4	4.1 to 2.0

	2007	2008				
	Q4	Q1	Q2	Q3	Q4	Latest
GDP Growth (%Δ YoY)		6.1	5.3	4.0	-4.3	
GDP Growth (%Δ QoQ)		1.2	0.8	0.6	-6.1	
SET (end of period)	858	817	768	596	450	443 (2 Apr 09)
Unemployment rate (%)	1.1	1.7	1.4	1.2	1.3	2.4 (Jan 09)
Manufacturing Index (% Δ YoY)	12.3	12.6	10.1	7.6	-8.0	-19.8 (Feb 09)
BSI	45.0	45.9	42.6	41.1	36.5	37.4 (Feb 09)

Thailand	2007	2008					
		Q1	Q2	Q3	Q4	Jan-09	Feb-09
Tourist Income (พันล้านบาท สรอ.)	16.7	5.9	4.0	3.8	3.9	1.6	1.4
(%Δ YoY)	24.4	28.7	26.2	1.0	-23.4	-17.7	-32.7
No. of Tourists (ล้านคน)	14.5	4.3	3.6	3.4	3.3	1.3	1.1
(%Δ YoY)	4.6	12.9	13.4	-1.8	-19.4	-10.5	-23.2

<u>China</u>	Q4	Jan	Feb	
Growth	↓			Q1 ↗ (forecast)
PMI	↓ (Dec 1)	↗	↗	
Car Sales		↗	↗ (2 M.cars)	
Retail Sales Property Sales New Loan		↗ ↗ ↗	↗ ↗ +24%	
Export		↓	↓	

<u>US</u>	Q4	Jan	Feb	
Growth	-5.5%			Q1 ↗ (forecast)
Car Sales	Stable in Dec.	↘ (9.4 M.cars)	↘ (9.1 M.cars)	↗ (9.4 M.cars)
Retail Sales	Nov +, Dec -	+1.7%	+1.5%	
House Start Home Sales	↘ ↘	↘ ↘	↗ ↗	
Finished goods price	↘	+0.1%	+3.2%	
Inventory			-0.9%	
Production Employment		↘ ↘	↘ ↘	

<u>EU</u>	Q4	Jan	Feb	
Growth	-6.4%			Q1 ↘ (forecast)
PMI	↘	↘	↘	+1.4% in March
Car Sales	↘	↘	↗ (W. Europe)	
Retail Sales	↘	↘	↘	
Property Sales	-	↘	↘	
New Loan	-	↘	↘	

<u>Japan</u>	Q4	Jan	Feb	
Growth	-12.7%			Q1 ↓ (forecast)
Car Sales	↓	↓	↓	
Retail Sales	↓	↓	↓	
CPI	↓	↓	↓	
Production	↓	↓	↓	
Employment	↓	↓	↓	

<u>Global</u>	Q4	Jan	Feb	
Growth	-6.5%			Q1 ↗ (forecast)
PMI	↘ (bottom at yearend)	+1.3 pt	+0.8 pt	↗
Car Sales	↘	Stable	↗ (China Brazil W. Europe)	
Retail Sales	-2.9%	↗	↗	
CPI	↘	+0.1% (m/m)	+0.3% (m/m)	
Business Spending		↘ ↘ ↘	↘ ↘ ↘	
Production				
Employment				



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