

CAMBODIA FOOD SECURITY AND NUTRITION QUARTERLY BULLETIN

ព្រឹត្តិបត្រប្រចាំត្រីមាស ស្តីពីសន្តិសុខស្បៀង និងអាហារូបត្ថម្ភនៅកម្ពុជា

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HIGHLIGHTS

- Early and sufficient rain in May contributed to timely rice seeding and transplanting in the second quarter of 2012. Wet season cultivated areas have increased from the previous year's.
- According to current river levels and predicted weather conditions, the maximum water level in the Bassac-Chakto Mukh station is expected to reach 10.55 m in 2012. When the river level exceeds an average of 10 m in this station there is a probability for floods.
- Rice prices have increased from the previous quarter due to increased demand and depleted stocks from dry and wet seasons.
- National survey data show that the nutritional status of women has not improved since 2000 and there has been no improvement in anemia status of pregnant women since 2005.

Environmental Conditions and Disasters

Rainfall in the second quarter of 2012 was lower than the corresponding period last year. This affected the water levels in the Mekong and Tonle Sap rivers, which stayed below their historical average. However, in May 2012, the rainfall amount exceeded the historical average, creating favorable conditions for timely rice seeding and transplanting.

The Cambodia Post-flood Relief and Recovery Survey found that the negative impact of the floods in September and October 2011 - including displacement, housing and asset damage, loss of livelihoods, and indebtedness – was significantly worse for the poorest households.

Food Production

Wet season rice cultivated areas increased by 7% compared to the same period in 2011. This is due to government policy encouraging farmers to plant more during the year, early and sufficient rain, farmers awareness and preparedness for flooding and shifting from planting for own consumption to marketing.

Cultivated areas for cassava sharply decreased by 18% year-on-year due to the decreasing price trend. The cultivated areas for maize and mung bean remained nearly the same compared to the corresponding month of last year.

Content

Environmental Conditions and Disasters.....	2
» Rainfall	
» River water level	
» Disasters	
Food Production.....	3
» Rice production	
» Subsidiary and industrial crop cultivation	
Food Prices.....	4
» International and regional food and rice prices	
» Local Consumer Price Index and Food Price Index	
» Local wholesale and retail food prices	
» Price monitoring and forecasting	
» Food purchasing power of vulnerable households	
Health and Nutrition.....	6
» Nutritional status of women	

Food Prices

Prices are projected to start increasing in July, August and September due to an increase in demand for rice. The demand will continue to increase until the wet season harvest in November.

The ToT for unskilled labor and low quality rice in the second quarter slightly increased as the drop in rice prices outweighed the drop in unskilled wage.

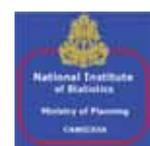
Health and Nutrition

National survey data show that the nutritional status of women has not improved since 2000. Young women (<20 years of age) are the most likely to be malnourished, at 28%.

Anemia rates of pregnant women have not improved since 2005. This affects safe delivery and the health of newborn children. To reduce anemia there is a need for dietary change and supplementation.

The Cambodia Food Security and Nutrition Quarterly Bulletin aims to provide decision makers with a regular overview of trends and emerging threats relating to food and nutrition security in Cambodia. It is a collaborative effort between the Council for Agricultural and Rural Development (CARD), the Ministry of Agriculture, Forestry and Fisheries (MAFF), the Ministry of Water Resource and Meteorology (MoWRAM), the Ministry of Health (MoH), the National Committee for Disaster Management (NCDM) and the National Institute of Statistics (NIS), with technical and financial support from UNICEF, the World Food Programme, the EC-FAO Food Security Programme and the World Health Organization, and with financial support from the MDG Achievement Fund for Children, Food Security and Nutrition.

To receive copies of this Bulletin, please contact: Secretariat of the Technical Working Group for Food Security and Nutrition, Council for Agricultural and Rural Development (Tel: +855 23 428 464, email: foodsecurity@online.com.kh, website: <http://www.foodsecurity.gov.kh/>)



This bulletin consists of secondary analysis of government administrative data and publically available data on a list of standard indicators – from regularly collected government data – agreed upon in the terms of reference of the Food Security and Nutrition Data Analysis Team.

ENVIRONMENTAL CONDITIONS AND DISASTERS

Rainfall

The rainfall amount in the first quarter of 2012 was higher than that of 2011 and the historical average, but in the second quarter (April to June) of 2012, the rainfall amount was lower than the historical average (Table 1). The average monthly rainfall in the second quarter was 144.1 mm, 14 mm less than in 2011 and 17 mm less than the historical average.

However, in May 2012, the rainfall amount was 50 mm higher than corresponding month in 2011 and 18.6 mm higher than the historical average. This was caused by the influence of a tropical depression and the Southwest monsoon.

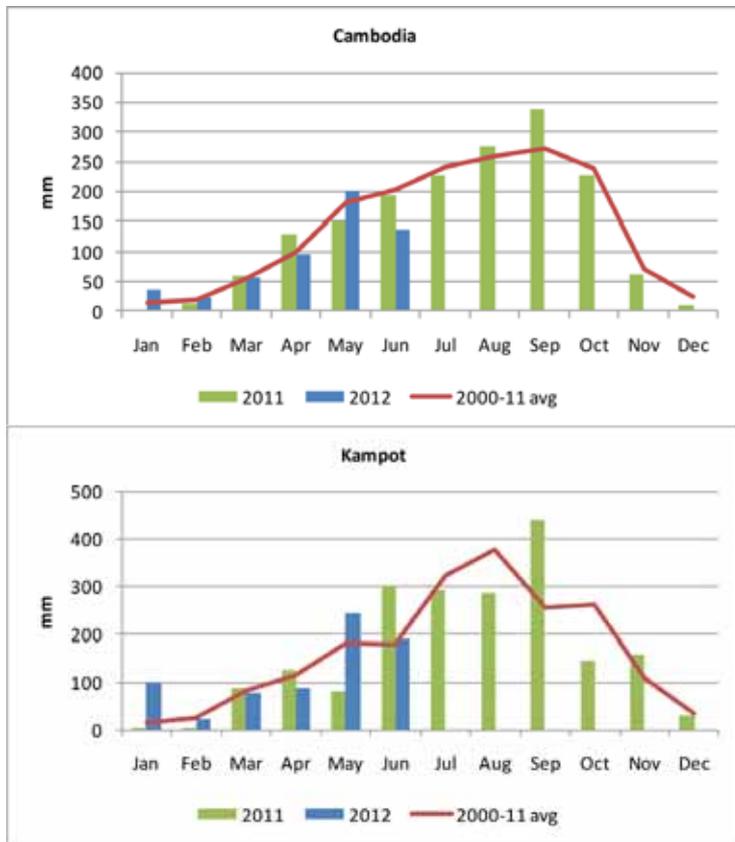
Table 1: Rainfall in Cambodia in April, May and June

Month	2000-11 avg (mm)	2011 (mm)	2012 (mm)
April	98.9	129.6	95.0
May	182.4	150.3	200.9
June	201.6	194.3	136.3
average	161.0	158.1	144.1

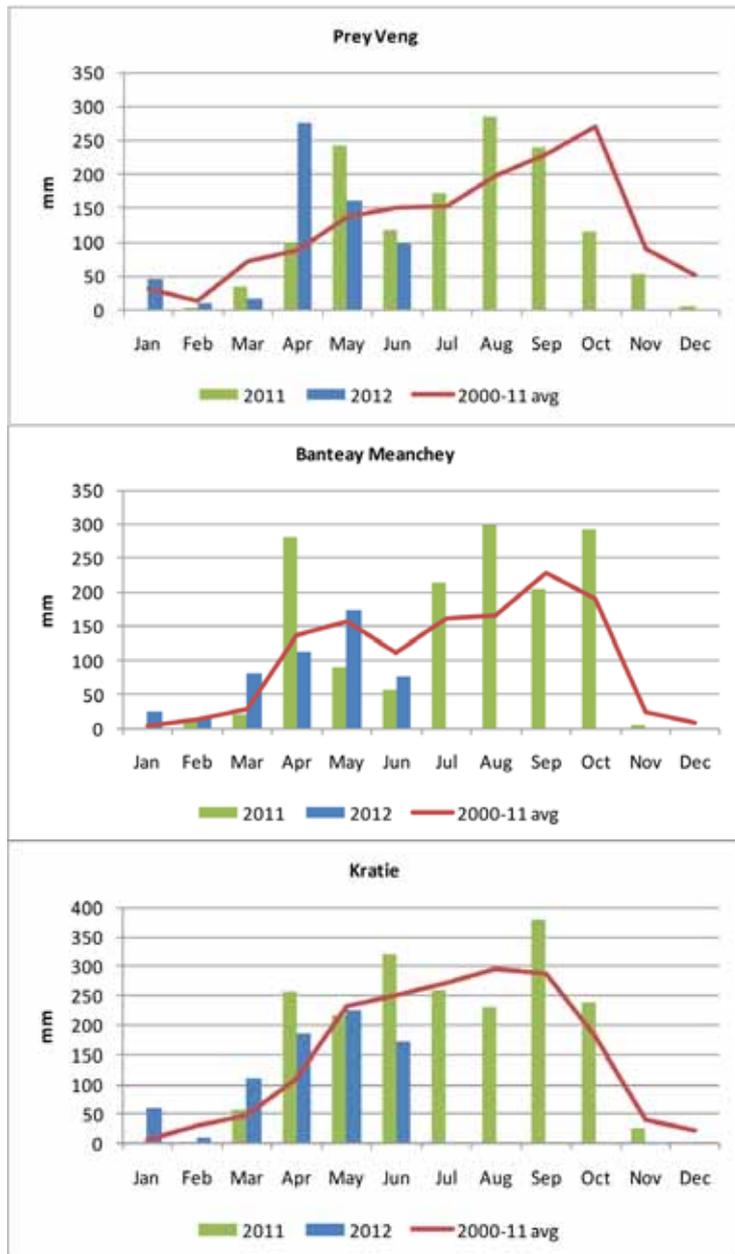
Source: Ministry of Water Resources and Meteorology

Rainfall patterns in four selected provinces¹, representing the main agro-ecological zones, are reported in Figure 1.

Figure 1: Rainfall levels in Cambodia and selected provinces



1 Kampt is in the Coastal zone, Prey Veng is in the Plains zone, Banteay Meanchey is in the Tonle Sap zone, and Kratie is in the Plateau/Mountain zone



Source: Ministry of Water Resources and Meteorology

The differential of the rainfall amount in the second quarter of 2012 to the historical average is displayed below in Map 1.

Map 1: Rainfall surplus and deficit in second quarter 2012



Source: Ministry of Water Resources and Meteorology

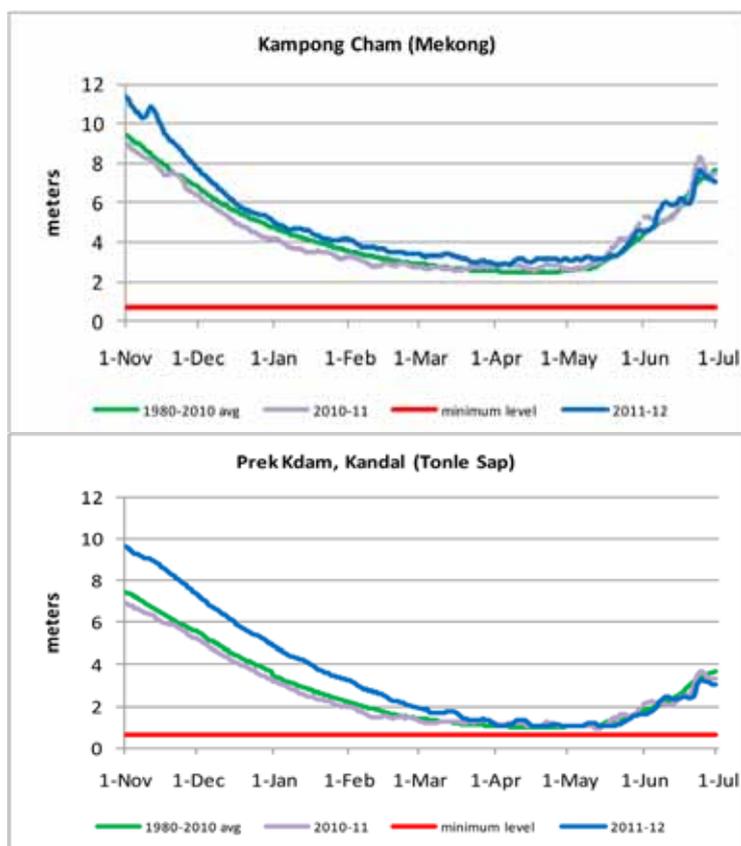
River water levels

Two stations were selected to monitor river water levels: Kampong Cham and Prek Kdam. The water level in the Mekong River is measured by the Kampong Cham station, while the Prek Kdam station measures the water levels in the Tonle Sap.

From November 2011 to May 2012, the water level in the Mekong River decreased but it was still higher than the historical average and the corresponding period in 2011. In mid-May, the water in the Mekong had the same level as in the corresponding period 2011.

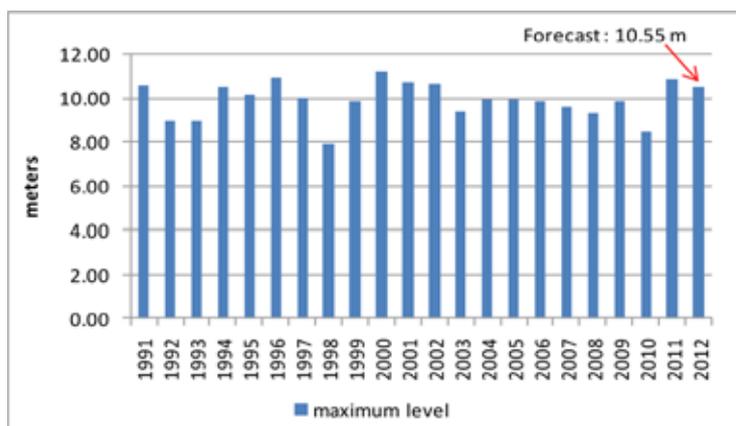
Similarly, the water level in the Tonle Sap decreased from November 2011 to May 2012. In early April 2012, the water level was lower than the corresponding period in 2011. However, in May, it started to increase and it was the same as the corresponding period in May 2011 and the historical average.

Figure 2: Water levels in selected stations in Mekong and Tonle Sap rivers



Source: Ministry of Water Resources and Meteorology

Figure 3: Water levels in Bassac-Chakto Mukh station



Source: Ministry of Water Resources and Meteorology

The Mekong River water level reached a maximum of 10.86 m (as measured in Bassac-Chakto Mukh station) in 2011. According to current river levels and weather conditions predicted by the Ministry of Water Resources and Meteorology, the maximum water level in the Bassac-Chakto Mukh station is expected to reach 10.55 m in 2012 (Figure 3). When the water level exceeds an average of 10 m in this station there is a probability for floods.

Disasters

In September and October 2011, following heavy rains, flooding directly affected 18 out of 24 provinces across Cambodia. The Cambodia Post-flood Relief and Recovery Survey² found that the negative impact of the floods was significantly worse for the poorest households.

Families relying on earnings from fishing and manual wage labour were particularly affected, with more than two-thirds reporting their income had decreased since the floods. Nearly half of the poorest households living in the worst affected areas reported having taken out a loan as a direct result of the disaster. The survey shows the floods disproportionately displaced the poorest – nearly 20 percent of the poorest households were forced from their homes, compared to just one percent of the richest.

The impact on agriculture was extensive, particularly in the most affected areas, where 90 percent of households growing wet season rice reported their crop was damaged in some way. Thirty percent reported the damage was so extensive they were not able to harvest any rice. For those who managed a wet season rice harvest, yield was less than half the average. More than two-thirds of households owning livestock reported losing some animals as a result of the floods, while half of those relying on fishing for income reported their catch was lower than the previous year.

The survey found that household food security and the health and nutrition status of mothers and children was stable compared to pre-disaster levels, although underlying chronic factors suggest the situation could deteriorate should the tenuous financial situation of poorest households worsen.

FOOD PRODUCTION

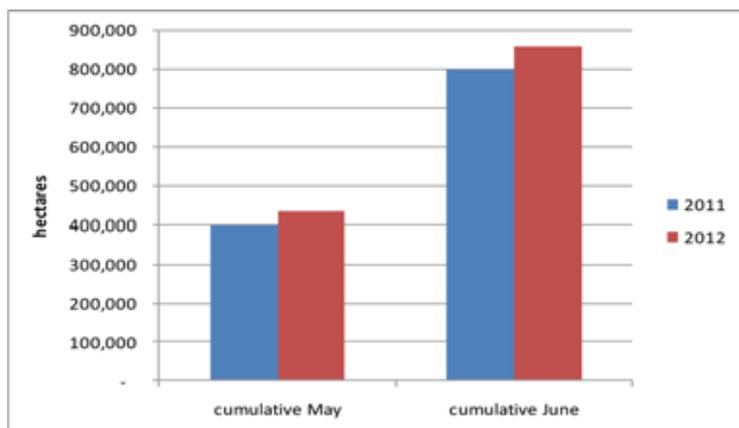
Rice production

In the first two months of the wet season in 2012, rice cultivated areas increased compared to the same period in 2011. At the end of June 2012, the total cultivated area was 85,702 ha, 7% higher than the corresponding period in 2011 (Figure 4). This is due to the government/MAFF policy encouraging rice farmers to plant two or three times a year, early and sufficient rainfall for timely rice seeding and transplanting, and farmers planting early in order to harvest prior to expected floods this year.

Table 2 shows the wet season rice cultivated areas in selected provinces at the end of June in 2011 and 2012. The last row is the deviation of cultivated and planned areas. In June 2012, the cultivated areas were about 14%, 15% and 2% higher than June 2011 in Banteay Meanchey, Takeo and Prey Veng, respectively. However, the cultivated areas in other main rice-producing provinces, Kampong Cham, Kampong Thom and Siem Reap, were lower than the corresponding month in 2011.

² ActionAid, Asian Development Bank, DanChurchAid/ACT Alliance, Danish Red Cross, Save the Children, UNICEF and WFP, in collaboration with the National Committee for Disaster Management, conducted a representative survey of 2,400 households in 11 flood-affected provinces in January 2012.

Figure 4: Wet season rice cultivated areas



Source: Ministry of Agriculture, Forestry and Fisheries

Table 2: Wet season rice cultivated areas by province

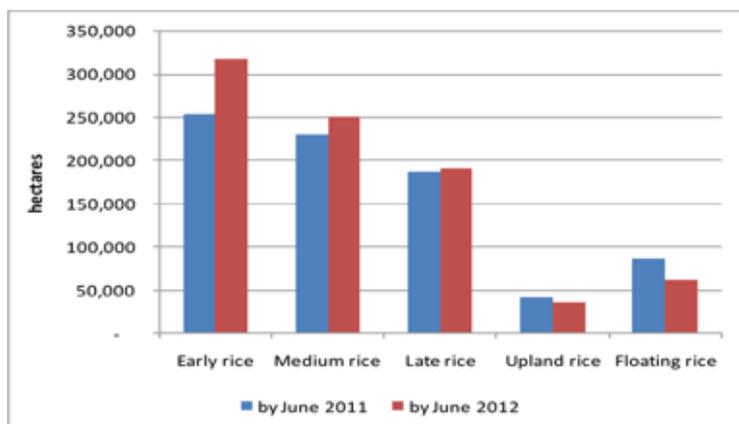
Province	Jun-11	Jun-12	% change	% of planned
Banteay Meanchey	180,949	205,938	13.8%	91.5%
Battambang	162,160	162,341	0.1%	64.8%
Kampong Cham	39,817	36,955	-7.2%	22.3%
Kampong Thom	60,713	57,091	-6.0%	27.2%
Prey Veng	82,024	83,871	2.3%	33.5%
Siem Reap	75,945	74,525	-1.9%	41.6%
Takeo	45,263	51,875	14.6%	30.5%
other	52,528	184,432	20.9%	20.1%
total	799,399	857,028	7.2%	36.2%

Source: Ministry of Agriculture, Forestry and Fisheries

In the beginning of the wet season of 2012, farmers planted a variety of crops, especially rice, even though some regions faced a water shortage in June.

The cultivation of early rice (early wet) and its areas was higher than last year due to several reasons: farmers planting early rice (early wet), some regions in the country being able to cultivate rice two or three times a year, farmers being aware of the weather situation and preparing for flooding and farmers changing from producing rice for own consumption to marketing. By June 2012, the cultivated area of early rice was 318,035 hectares, 26% higher than the corresponding month in 2011 (Figure 5).

Figure 5: Cultivated area by type of rice



Source: Ministry of Agriculture, Forestry and Fisheries

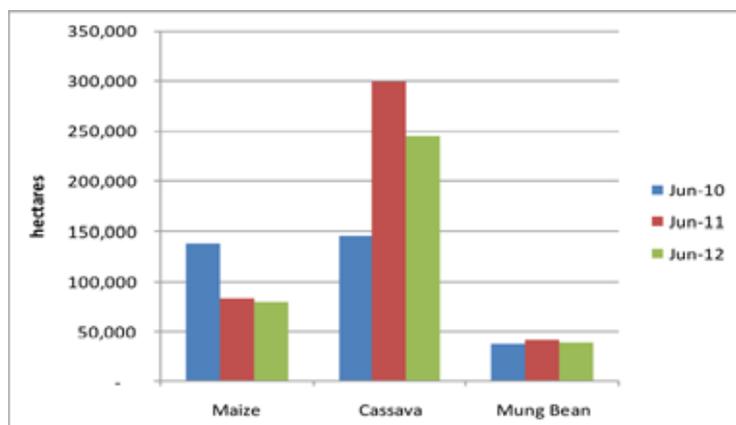
Subsidiary and industrial crop cultivation

Besides rice, some key subsidiary and industrial crops, such as maize, cassava and mung bean, are cultivated in Cambodia. Figure 6 compares the cultivated area of three key crops in recent years.

The cultivated area has changed based on fluctuations in commodity prices and the level of demand from neighboring countries. The greatest change has been for cassava. In June 2012, the average cultivated area for cassava was 18% lower than the corresponding month in 2011. The cultivated area sharply decreased in Battambang, Pailin, Preah Vihear and Kratie due to last year's low price and farmers' lack of storage space (Figure 7).

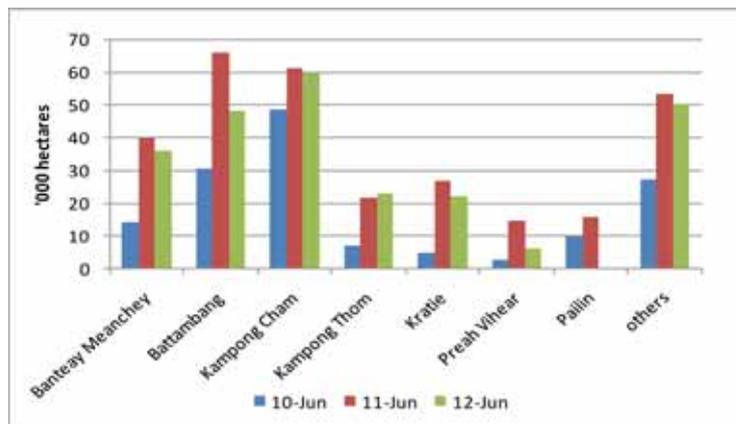
In June 2012, the cultivated area for maize slightly decreased compared to last year due to less price fluctuation and stable demand from neighboring countries. There was no significant change of cultivated area for mung bean because its demand is only local.

Figure 6: Cultivated area of key subsidiary and industrial crop



Source: Ministry of Agriculture, Forestry and Fisheries

Figure 7: Cultivated area for cassava by province



Source: Ministry of Agriculture, Forestry and Fisheries

FOOD PRICES

International and regional food and rice prices

The FAO Food Price Index³, measuring the international price level of a basket of key food commodities, averaged 201 points in June 2012. The international food price declined for the past three consecutive months due to favorable supply conditions of key commodities and the strengthening US dollar (Figure 8).

3 The FAO Food Price Index consists of the average of commodity group price indices (i.e. meat, dairy, cereals, oils/fats, and sugar) weighted with the average export shares of each of the groups for 2002-2004.

The International Rice Price Index, at 237 points, increased by 0.4% on a month-on-month basis in June 2012. The rice price increased for the first time in six months, after decreasing for five consecutive months. FAO reported that the increase in international rice prices was mainly due to an increase in demand ahead of the Ramadan month.

Figure 8: FAO Food and Rice Price Indices (100 = 2002-04)



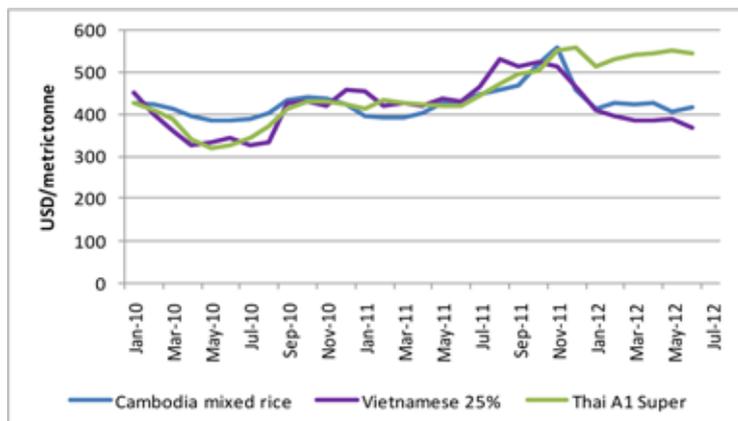
Source: FAO, <http://www.fao.org/worldfoodsituation/FoodPricesIndex/en/>

In June 2012, the f.o.b. prices⁴ of Thai A1 Super white rice (100% broken) and Vietnamese white rice (25% broken), benchmark prices for Asia, were 545 USD/mt and 369 USD/mt, respectively (Figure 9).

Thai Super A1 rice prices increased for the fourth consecutive month and for the first time decreased in June by 1.6% on a month-on-month basis. Prices were 29.5% higher than the corresponding month last year. Upward price pressure stemmed from the Thai government's rice pledging policy which was initially planned until June 2012. According to media reports, the Thai government extended the rice pledging scheme until November 2012 in order to maintain high domestic rice prices. The Thailand Development Research Institute recently reported that exports had fallen by 44% year-on-year since January 2012 as a result of the rice pledging policy.

Throughout the entire quarter Vietnamese white rice prices decreased, except for a slight increase in May. In June, prices decreased by 4.9% month-on-month and were 14.2% lower than the corresponding month last year. According to the Ministry of Agriculture and Rural Development of Vietnam, while rice imports to China, Senegal and Malaysia increased, traditional rice importers, such as Indonesia and Philippines, reduced their rice imports.

Figure 9: Wholesale price of Thai, Vietnamese and Cambodian white rice



Source: FAO, <http://www.fao.org/es/esc/prices/PricesServlet.jsp?lang=en>

⁴ Free on board (f.o.b.) price includes all charges up to the placing of goods on board a ship at the port of departure specified by the buyer.

Local consumer price index and food price index

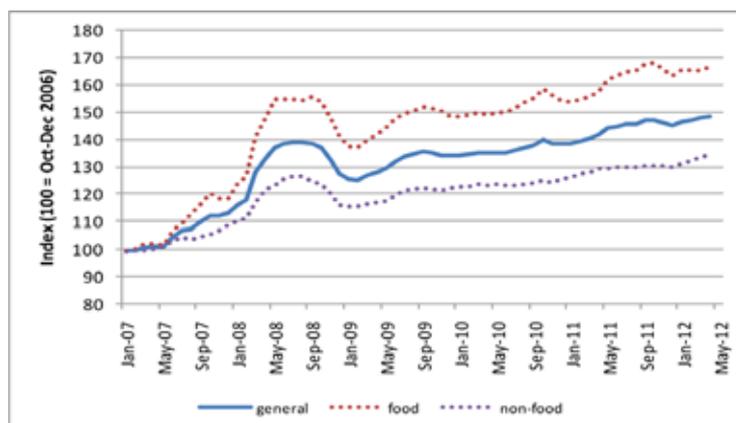
The general Consumer Price Index (CPI)⁵ measures the cost of a consumption basket composed of 259 items. Each item is weighted based on their importance in an average household's expenditure⁶.

In May 2012⁷, the general CPI decreased by 1.1% month-on-month, after increasing for the fourth consecutive month. The inflation rate, as measured by the year-on-year increase in the consumer price index, was 2.2%.

The Food Price Index (FPI) measures the cost of the food items in the general CPI's consumption basket. Food items make up 43.2% of the total consumption basket. In May, food prices decreased by 0.8% month-on-month but increased by 2.2% year-on-year (Figure 10). The price of meat – which makes up 22.4% of the food price index – increased 0.3% month-on-month and 2.8% on a year-on-year basis in May 2012.

Gasoline price levels decreased by 4.9% month-on-month, decreasing transportation costs for both food and non-food items. Gasoline prices were 4.8% above levels in the corresponding month last year.

Figure 10: Relative change in general consumer prices, food prices and non-food prices (base = Oct-Dec 2006)



Source: National Institute of Statistics

Local wholesale and retail food commodity prices

Price reports from the Agricultural Marketing Office of the Ministry of Agriculture, Forestry and Fisheries (AMO MAFF) show that the mixed rice⁸ wholesale price in the second quarter of 2012 was higher than in the previous quarter. In April, May and June 2012, prices increased by 0.9%, decreased by 4.4%, then increased by 2.2% on a month-on-month basis, respectively. The upward pressure on rice prices in June was due to the increase in demand and depleted rice stocks of the wet and dry season harvest (Figure 11). After adjusting for the annual inflation rate of 2.2%, the real price of wholesale rice was lower than that of the corresponding month last year and has decreased by 4.9% on a year-on-year basis.

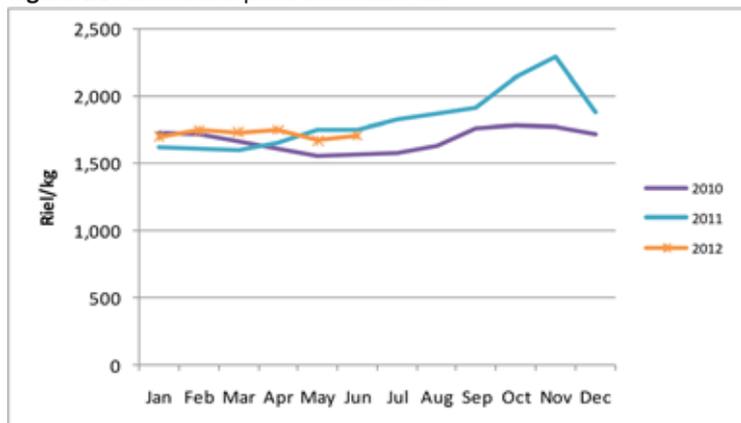
⁵ The CPI is collected and reported by the National Institute of Statistics (NIS).

⁶ Relative item expenditure weights are derived from the 2004 Cambodia Socio-Economic Survey and adjusted to October-December 2006 price levels.

⁷ The CPI data for June 2012 was not released by NIS at the time of publication.

⁸ Mixed rice is considered a low quality rice.

Figure 11: Wholesale price of mixed rice⁹



Source: Cambodia Agricultural Market Information Service, MAFF

Price Monitoring and Forecasting

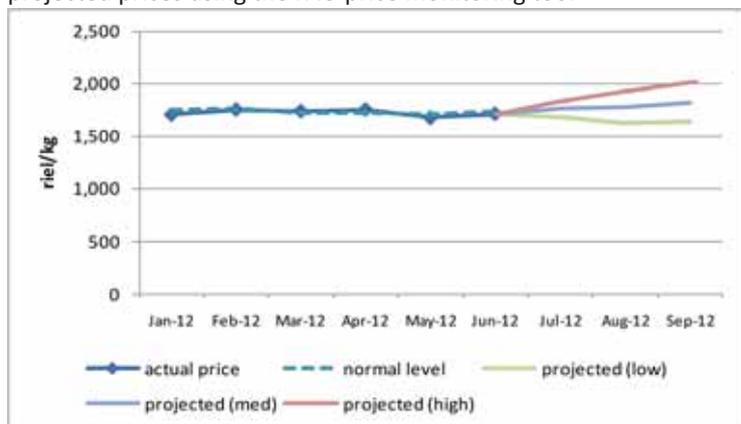
FAO’s price monitoring tool compares recent actual wholesale prices from AMO MAFF with “normal” price levels. The “normal” price level takes into account historical price levels and adjusts for inflation and seasonal factors. A discrepancy between current actual prices and “normal” prices indicates that current prices are higher/lower than what would be expected based on historical price levels, inflation, and seasonal factors.

In June 2012, the actual price of wholesale rice was 1.1% lower than the expected normal price, which indicates that price levels were below historically normal levels for June.

The FAO price monitoring tool also projects prices based on the current price, current inflation rate and seasonal factors. The high and low bands are set so that actual prices will fall within the range 80% of the time.

Prices for the following quarter (July, August and September) were projected by the price monitoring tool using the June 2012 price, current inflation rate, and seasonal factors. Rice prices are expected to increase in July, August and September. This is the usual trend in the rice price fluctuation during the wet season due to the increase in demand. The demand for rice will continue to increase until the beginning of the main wet season harvest in November (Figure 12).

Figure 12: Comparison of recent wholesale prices with normal and projected prices using the FAO price monitoring tool



Source: AMO, WFP, FAO

Food Purchasing Power of Vulnerable Households

The daily wages of unskilled workers engaged in rice and non-rice farming and construction work are monitored by Provincial Department of Agriculture staff on a monthly basis since September 2011 in six provinces¹⁰.

Terms of trade (ToT) is used to assess the food purchasing power of households that are dependent on wages from unskilled labour by using the ratio of the daily wage rates of unskilled laborers and the retail price of lowest quality rice in the market. This gives an indication of the amount of rice that an unskilled wage labourer can purchase with a daily wage.

The ToT for unskilled labor and low quality rice decreased by 6% in March and increased by 22% in April on a month-on-month respectively. The increase in ToT in April was mainly due to a decrease in the price of rice. In May 2012, the ToT sharply decreased by 29% month-on-month as increase in rice price outweighed unskilled wage and in June increased by 9% month-on-month due to upward trend in unskilled wage resulting in increasing household purchasing power.

Table 3: Terms of trade of unskilled labour and low quality rice

	Mar-12	Apr-12	May-12	Jun-12
Unskilled wage (riel/day)	14,567	14,396	14,125	14,449
Mixed rice (riel/kg)	1,881	1,525	1,924	1,800
Terms of Trade (kg/day)	7.7	9.4	7.3	8.0

Source: Cambodia Agricultural Market Information Service, MAFF

HEALTH AND NUTRITION

Nutritional status of women

When looking at the lack of progress in child nutrition from 2005 to 2010 it is important to consider trends in the nutritional status of mothers.

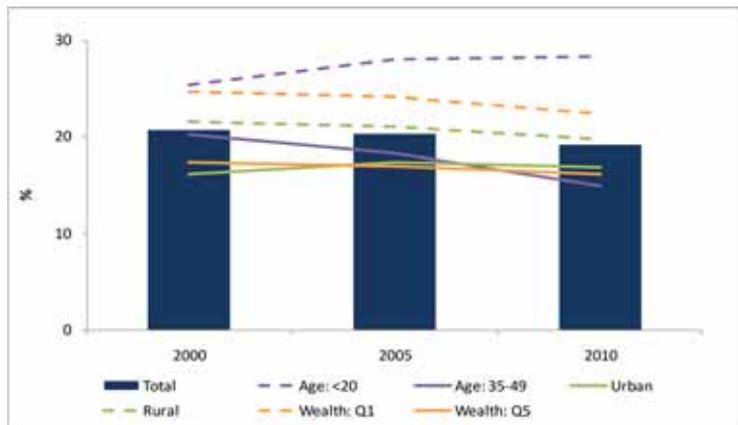
Figure 13 shows there has been little improvement in the nutritional status of women and around 1 out of 5 are too thin. Young women (< 20 years of age) are the most likely to be malnourished, at 28%. The only group that has seen improvement are women age 35-49. Improvement in this age group will not have an impact on child nutrition.

It is not presented in this figure, but the nutritional status of women most likely to have small children (20 to 34 years of age) has not changed since 2000, with 18% malnourished.

⁹ Wholesale rice prices are calculated with price quotes from urban markets or rice mills in the following provinces: Kampong Chhnang, Kampong Cham, Takeo, Siem Reap, Prey Veng, Phnom Penh, Kampot, Battambang, Banteay Meanchey.

¹⁰ Battambang, Kampong Cham, Kampong Thom, Prey Veng, Pursat and Siem Reap

Figure 13: Percent distribution of women age 15-49 classified as thin (body mass index <18.5) by background characteristics



Source: Cambodia Demographic and Health Survey

Table 4: Percent distribution of women age 15-49 classified as thin (body mass index <18.5) by background characteristics

Background Characteristic	Thin (BMI < 18.5) ¹			Comparison		
	2000	2005	2010	'10-'00	'05-'00	'10-'05
Age						
< 20	25.4	28.0	28.3	2.9	2.5	0.3
20-34	18.1	18.3	18.1	0.0	0.2	-0.1
35-49	20.2	18.3	14.9	-5.3	-2.0	-3.4
Diff (Old-Young)	-5.2	-9.7	-13.4	-8.2	-4.5	-3.7
RR (Old-Young)	0.80	0.65	0.53			
Education						
None	22.0	19.1	18.6	-3.4	-3.0	-0.5
Primary	19.7	20.4	17.6	-2.1	0.7	-2.8
Secondary +	21.5	21.1	21.3	-0.2	-0.4	0.2
Diff (Secondary-None)	-0.5	2.1	2.7	3.2	2.6	0.6
RR (Secondary:None)	0.98	1.10	1.15			
Residence						
Urban	16.1	17.3	16.8	0.7	1.2	-0.4
Rural	21.6	21.0	19.7	-1.9	-0.6	-1.3
Diff (Urban-Rural)	-5.5	-3.8	-2.9	2.6	1.7	0.9
RR (Urban:Rural)	0.75	0.82	0.85			
Wealth quintile						
Lowest	24.6	24.1	22.4	-2.1	-0.5	-1.7
Second	20.9	22.2	21.0	0.0	1.2	-1.2
Middle	20.9	22.2	18.1	-2.8	1.4	-4.2
Fourth	20.5	17.8	18.8	-1.7	-2.7	1.0
Highest	17.3	16.9	16.1	-1.2	-0.4	-0.8
Diff (Q5:Q1)	-7.3	-7.2	-6.3	1.0	0.1	0.9
RR (Q5:Q1)	0.70	0.70	0.72			
Total	20.7	20.3	19.1	-1.6	-0.3	-1.3
Number	6,797	7,799	8,757	15,554	14,596	16,556

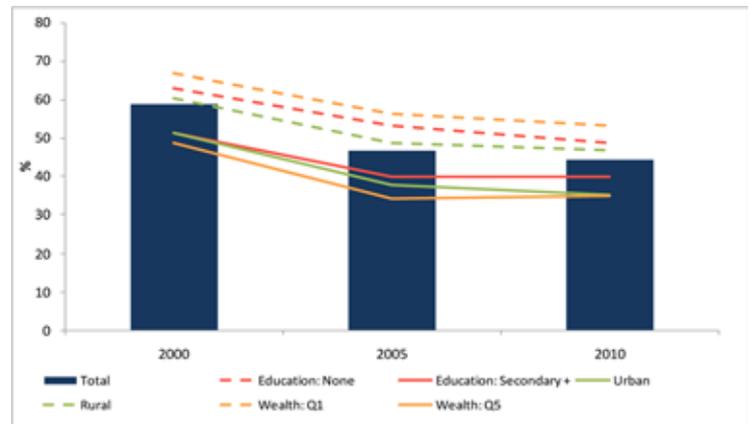
¹Excludes pregnant women and women with a birth in the preceding two months.
Percent distribution of women age 15-49 classified as thin (BMI < 18.5), according to background characteristics. Cambodia MNCH Equity Analysis, 2012.

Source: Cambodia Demographic and Health Survey

Trends in anemia of pregnant women are different from BMI because there was significant improvement from 2000 to 2005. However, from 2005 to 2010, anemia rates did not change much. From Figure 14 we can see that the lack of improvement was the same for wealthy and poor, educated and not educated, and urban and rural. Similar to BMI, the only group that showed positive improvement from 2005 to 2010 are women older than 35 years of age, as shown in the table below.

Lack of improvement among the women most likely to be pregnant, regardless of wealth, education or place of residence, suggests that general improvement in living standards is not going to result in continued improvement in anemia; dietary change or supplementation is required to further reduce anemia. Interventions are needed for safe delivery and to improve the health of newborn children.

Figure 14: Percent distribution of women age 15-49 with anemia by background characteristics



Source: Cambodia Demographic and Health Survey

Table 5: Percent distribution of women age 15-49 with anemia by background characteristics

Background Characteristic	Any Anemia ¹			Comparison		
	2000	2005	2010	'10-'00	'05-'00	'10-'05
Age						
< 20	58.5	46.4	47.8	-10.7	-12.1	1.4
20-34	56.8	43.9	42.0	-14.8	-12.9	-1.9
35-49	61.1	50.1	45.8	-15.4	-11.0	-4.4
Diff (Old-Young)	2.6	3.7	-2.1	-4.7	1.1	-5.8
RR (Old-Young)	1.04	1.08	0.96			
Education						
None	62.9	53.3	48.7	-14.2	-9.5	-4.7
Primary	58.8	47.2	46.1	-12.6	-11.5	-1.1
Secondary +	51.3	39.9	39.9	-11.4	-11.5	0.0
Diff (Secondary-None)	-11.5	-13.4	-8.7	2.8	-1.9	4.7
RR (Secondary:None)	0.82	0.75	0.82			
Residence						
Urban	51.4	37.7	35.0	-16.4	-13.7	-2.7
Rural	60.3	48.6	46.9	-13.4	-11.7	-1.7
Diff (Urban-Rural)	-8.9	-10.9	-11.9	-3.0	-2.0	-1.0
RR (Urban:Rural)	0.85	0.78	0.75			
Wealth quintile						
Lowest	66.7	56.4	53.2	-13.4	-10.3	-3.1
Second	60.3	50.0	49.1	-11.2	-10.2	-1.0
Middle	59.8	49.8	43.8	-15.9	-10.0	-5.9
Fourth	59.3	46.6	43.9	-15.4	-12.7	-2.7
Highest	48.8	34.2	34.8	-14.1	-14.6	0.5
Diff (Q5:Q1)	-17.8	-22.1	-18.5	-0.6	-4.3	3.7
RR (Q5:Q1)	0.73	0.61	0.65			
Total	58.8	46.7	44.4	-14.4	-12.1	-2.3
Number	3,634	8,219	9,229	12,863	11,853	17,448

¹Cut-offs adjusted for smoking; pregnant <11.0 g/dL and non-pregnant <12.0 g/dL.
Percent distribution of women age 15-49 with anemia, according to background characteristics. Cambodia MNCH Equity Analysis, 2012.

Source: Cambodia Demographic and Health Survey