

Economy Watch—External Environment

This section focuses on the major world economies and economies in east Asia during the third quarter of 2010.

World Economic Growth

In the third quarter of 2010, real GDP growth in Indonesia was 5.8 percent year on year, following growth of 6.2 percent in the second quarter. Malaysia's GDP growth went down to 5.3 percent, and growth in Singapore dropped to 10.5 percent. Net exports in this quarter contributed only 11.4 percentage points to the Singapore's GDP. Domestic demand, which was still weak, contributed only 0.4 percentage points to growth. In addition, a slowdown in growth in personal consumption also lowered the rate of GDP growth in Singapore. Thailand's GDP growth contracted to 6.7 percent. The slowdown was due to the rapid appreciation of the baht, making Thai products more expensive in foreign markets. Growth in exports went down but imports grew by 24.9 percent year on year. Thus the trade balance in this quarter was in deficit. Inventories grew significantly in this quarter. The rebuilding of inventories and restocking boosted overall GDP growth.

Year-on-year growth in China dropped to 9.7 percent from 10.3 percent in the second quarter. Year-on-year growth in Hong Kong increased to 6.8 percent from 6.5 percent in the previous quarter. South Korea dropped to 4.5 percent and Taiwan to 9.8 percent. Fixed capital formation contributed 4.2 percentage points to GDP growth in Taiwan. Private consumption, fuelled by consumer confidence and declining unemployment, also continued to grow, expanding by 4.5 percent year on year and contributing 2.5 percentage points to GDP growth. Overall domestic demand contributed 8.4 percentage points to GDP growth. Growth in exports also contributed significantly to Taiwan's GDP growth. Japan's growth increased to 5.0 percent, while in the US, year-on-year growth contracted to 2.3 percent.

World Inflation and Exchange Rates

This was the third quarter of deflationary pressures in Japan in 2010, while inflation increased in many countries. In Indonesia, the inflation rate was 6.2 percent, accelerating from 4.4 percent in the second quarter; the prices of clothing and transportation tended to rise ahead of Ramadan. Unstable food prices and government-administered prices also contributed to inflationary pressure. Inflation in Malaysia remained low at 1.9 percent, and in Singapore it was 3.4 percent. Consumer inflation in Thailand was stable at 3.3 percent. In Vietnam it was 8.4, lower than in the previous quarter by 0.6 percent. Inflation in China was 3.3 percent. The year-on-year consumer price increase in Hong Kong dropped to 2.3 percent. In South Korea, inflation was 2.6 percent, compared with 2.9 percent in the second quarter, and in Taiwan 0.4 percent. In Japan it remained negative at -0.9 percent. US inflation was 1.2 percent.

During the same period, the rupiah appreciated against the US dollar by 1.5 percent from the preceding quarter. The ringgit appreciated by 2.8 percent. The Singapore dollar, yuan and Taiwan dollar were stable and the Thai baht appreciated by 2.2 percent, while the Vietnamese dong depreciated by 2.6 percent. The Hong Kong dollar appreciated against the US dollar by 0.1 percent, while the South Korean won depreciated by 1.4 percent. The euro appreciated 2.5 percent and the yen 7.0 percent.

Commodity Prices in World Markets

During the third quarter, maize (US No. 2) rose by 12 percent from the previous quarter to USD176/tonne. The price of soybeans rose 10 percent to USD407/tonne. Rubber SMR 5 went up by 3.0 percent to USD3176/tonne, rice (Thai 100%) by 1.5 percent to USD468/tonne. Crude oil declined by 2.7 percent to USD75/barrel, gasoline 2.7 percent to USD0.51/ℓ and diesel fuel by 5.3 percent to USD0.54/ℓ.

Prepared by Sry Bopharath

Economy Watch—Domestic Performance

Main Economic Activities

In the third quarter of 2010, fixed asset investment approvals increased by 48 percent compared with the preceding quarter. This was due to agricultural approvals escalating by 571 percent to USD278.0 m. Four agro-industry projects were approved, accounting for USD176.9 m. Rubber plantation approvals increased to six projects amounting to USD101.1 m. Industry approvals declined by 19 percent to USD44.3 m. However, garment approvals rose by 47 percent to USD31.4 m. There were no services approvals in this quarter.

In the third quarter, visitor arrivals increased by 8.3 percent from the preceding month, to 582,024. Arrivals by air grew 11 percent to 288,254 and arrivals by land and water expanded by 6.2 percent to 293,770. The most arrivals from ASEAN countries and Asia and the Pacific were from Vietnam at 125,617, Korea at 63,335 and China at 43,494.

Total exports in this quarter increased by 57 percent compared with the preceding quarter, to USD903.9 m. Garments accounted for 89.2 percent of total exports. Exports to the US rose by 57 percent to USD134 m, to the EU by 43.7 percent to USD167 m, to Japan by 39 percent to USD214 m and to the rest of the world by 48 percent to USD165 m. Exports to ASEAN escalated by 235 percent to USD126 m. Agricultural exports grew by 40 percent to USD98 m. This was due to rubber exports expanding by 84 percent and wood by 96 percent, while fish exports dropped 11 percent. Other exports increased 24 percent. Total imports were up 8.0 percent. Gasoline imports rose by 23 percent, while diesel shrank by 14 percent. Construction material imports increased by 21 percent; other imports rose 108 percent.

Public Finance

Current revenue rose by 7.5 percent compared with the previous month, to KHR1431 bn. An increase of domestic tax by 3.0 percent and taxes on international trade by 22 percent resulted in the expansion of tax revenue by 7.1 percent. Non-tax revenue rose by 10 percent, while capital revenue declined by 53 percent. Capital expenditure fell 2.8 percent, while current expenditure increased

29 percent. Foreign financing of the budget in this quarter dropped 45 percent, but domestic financing went up by 77 percent.

Inflation and Foreign Exchange Rates

In the third quarter, the consumer price index rose 1.8 percent year on year, food and non-alcoholic beverages 1.9 percent and transportation 3.2 percent. Against the US dollar, the riel depreciated by 0.7 percent to 4236.7, and against the Thai baht it depreciated 6.5 percent. The riel appreciated 3.2 percent against the Vietnamese dong. The price of gold increased by 5.0 percent to USD150 per chi. Diesel and gasoline increased by 2.6 percent and 1.3 percent respectively compared with the previous quarter.

Monetary Developments

Total liquidity (M2) in the third quarter rose by 3.4 percent to KHR18,888 bn. Riels in circulation dropped to KHR2917 bn, and riel deposits declined to KHR145 bn. During the same period, foreign currency deposits rose to KHR15,395 bn. Net foreign assets increased 34 percent to KHR16,903 bn due to an increase in foreign assets to KHR18,995 bn and an increase of foreign liabilities to KHR2092 bn. Net domestic assets increased 11 percent to KHR1985 bn. Domestic credit rose to KHR10,361 bn and other liabilities to KHR8377 bn.

Poverty

In November, real daily earnings of nine of 10 vulnerable worker groups increased moderately compared with the same month in 2009. One group, skilled construction workers, experienced a decrease in their earnings.

Forty cyclo drivers selected for interviews on their daily living conditions reported an increase of 24 percent in their earnings compared with the same month in the previous year, to KHR8942/day. However, their overall real daily spending also went up, by 25 percent to KHR5092/day. Of the cyclo drivers interviewed, only 13 percent rented accommodation, while the rest stayed on the road

or in pagodas, in the cyclo owner’s house, with relatives and so forth.

Real earnings of vegetable traders in November rose to KHR9006/day, 22 percent higher than in the same month of 2009. Forty-five percent of the respondents said that they could increase their incomes if they had enough capital to invest in their business. Their real daily expenditure was a slight rise of only 0.4 percent, to KHR4183/day. Twenty-seven percent of the interviewees from Phnom Penh, 20 percent each from Prey Veng and Svay Rieng and 13 percent from Kandal.

Scavengers’ earnings rose sharply, by 49 percent from 2009, reaching KHR6766/day. This resulted from an increase in rubbish prices offsetting a rise in the number of rubbish collectors and a decrease in the source of rubbish. Only 20 percent had their own shelters, while the others were from the provinces, renting accommodation in Phnom Penh. They spent on average KHR3846/day, a sharp increase

of 83 percent from the previous year. Ninety-seven percent saved no money.

Earnings of garment workers in turn rose by 6.2 percent to KHR7944/day. Eighty-nine percent of respondents worked six days per week, plus a frequent provided overtime. The workers spent an average KHR4634/day, a fall of 0.5 percent from November 2009. However, 64 percent could not save much.

There was a contrasting trend in the earnings of skilled construction workers. They earned KHR12376/day, 1.6 percent less than in the same month of the previous year. This stemmed from a rise of the number of the workers more than offsetting an increase in construction activities. Their daily expenditure was down by 8.6 percent to KHR3484/day. Still, 24 percent could not save.

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Economy Watch—Domestic Performance

Table 1. Private Investment Projects Approved, 2004–10

	2004	2005	2006	2007	2008	2009				2010		
						Q1	Q2	Q3	Q4	Q1	Q2	Q3
	Fixed Assets (USD m)											
Agriculture	12.3	26.8	498.0	135.6	92	175.3	0.0	176.1	94.4	165.7	41.4	278.0
Industry	187.9	914.6	365.3	709.1	724.9	257.7	39.4	60.6	685.5	247.7	54.5	44.3
. Garments	132.6	174.4	89.4	170.7	142.8	16.4	35.0	21.9	14.2	13.1	21.3	29.3
Services	91.8	155.5	2939.1	1742.5	10,003.2	495.6	0.0	150.2	3475.8	89.5	121.6	0
. Hotels and tourism	55.9	102.6	345.0	1048.3	8758.1	254.1	0.0	150.2	0.0	3.78	14.0	0
Total	292.0	1096.9	3802.4	2587.2	10570.9	928.6	39.4	386.3	4255.7	502.9	217.5	322.3
	Percentage change from previous quarter											
Total	-	-	-	-	-	-41.2	-95.7	882.0	1001.7	-91.2	-56.8	48.2
	Percentage change from previous year											
Total	-5.6	275.6	246.6	-32.0	308.6	266.5	-99.0	-91.5	169.3	-59.8	452.0	-16.6

Including expansion project approvals. Source: Cambodian Investment Board

Table 2. Value of Construction Project Approvals in Phnom Penh, 2004–10

	2004	2005	2006	2007	2008	2009				2010		
						Q1	Q2	Q3	Q4	Q1	Q2	Q3
	USD m											
Villas and houses	30.3	45.5	33.1	79.1	154.7	32.1	6.7	2.2	9.8	5.1	7.5	14.13
Flats	167.6	204.2	213.3	297.2	221.6	95.2	18.9	6.3	28.0	11.1	127.2	25.32
Other	65.6	109.1	76.8	259.6	740.9	53.7	36.7	12.2	29.0	35.2	67.4	38.90
Total	263.5	358.8	323.3	635.8	1117.0	181.1	62.3	20.7	66.8	51.4	202.1	78.35
	Percentage change from previous quarter											
Total	-	-	-	-	-	-48.5	-65.6	-66.8	222.7	-23.1	293.2	3776.8
	Percentage change from previous year											
Total	32.5	36.2	-9.9	96.7	75.7	31.9	-55.8	-95.7	-81.0	-71.6	224.4	37750.2

Source: Department of Cadastre and Geography of Phnom Penh municipality

Table 3. Foreign Visitor Arrivals, 2004–10

	2004	2005	2006	2007	2008	2009				2010		
						Q1	Q2	Q3	Q4	Q1	Q2	Q3
	Thousands											
By air	626.1	856.5	1029.0	1296.5	1239.4	335.2	221.2	247.2	308.1	371.5	260.9	288.3
By land and water	428.9	565.1	672.9	718.6	881.9	287.1	243.0	240.2	279.5	312.2	276.6	293.8
Total	1055.0	1421.6	1701.9	2015.1	2121.3	622.3	464.2	487.4	587.6	683.7	537.5	582.0
	Percentage change from previous quarter											
Total	-	-	-	-	-	7.7	-25.4	5.0	20.6	16.4	-21.4	8.3
	Percentage change from previous year											
Total	50.5	34.7	19.7	28.4	5.3	-3.4	2.2	9.4	1.7	9.9	15.8	19.4

Source: Ministry of Tourism

Table 4. Exports and Imports, 2004–10

	2004	2005	2006	2007	2008	2009				2010		
						Q1	Q2	Q3	Q4	Q1	Q2	Q3
	USD m											
Total exports	2189.4	2452.5	2920.4	3160.1	3206.9	568.94	558.11	618.84	648.87	496.06	575.40*	903.90
Of which: Garments	2108.1	2352.8	2810.8	3050.2	3097.8	462.2	492.4	535.5	579.3	433.3	505.4	806.0
. To US	1281.7	1555.6	1851.7	1959.9	1913.0	88.0	88.1	89.3	80.1	76.7	85.2	134.1
. To EU	593.1	506.9	603.0	660.9	693.4	108.6	128.3	125.7	113.8	102.5	115.9	166.6
. To ASEAN	55.4	70.7	80.4	90.3	99.6	51.0	55.1	62.1	152.1	42.7	37.5	125.7
. To Japan	23.0	25.0	40.6	30.1	26.5	110.9	112.8	149.3	128.3	124.1	154.8	214.4
. To rest of the world	154.9	194.6	235.1	309.0	365.3	103.7	108.1	109.1	105.0	87.3	112.0	165.2
Agriculture	81.3	99.7	109.6	109.9	109.1	106.74	65.71	83.34	69.57	62.76	70.00*	97.9
. Rubber	38.3	36.7	41.5	41.0	35.8	11.79	8.27	15.08	16.49	11.94	13.81	25.4
. Wood	11.1	10.3	8.6	8.7	3.4	0.55	0.5	0.64	1.83	2.75	4.48	8.8
. Fish	10.6	10.1	5.9	3.2	2.3	0.83	0.85	1.11	1.2	0.81	0.56	0.5
. Other	21.3	42.6	53.6	57.0	67.6	93.57	56.09	66.51	50.05	47.26	51.15	63.2
Total imports	2148.9	2513	512.2	554.8	1010.9	173	177.8	148.8	133.2	139.3	174.8	188.7
Of which: Gasoline	30.2	40.2	38.8	58.7	70.1	16.8	15.6	19.3	19.4	22.0	17.3	21.2
Diesel	109.4	93.1	113.0	122.8	113.5	34.2	40.0	46.0	43.1	44.7	49.6	42.6
Construction materials	95.3	134.7	56.5	69.0	77.8	13.8	14.8	15.7	13.3	14.5	13.5	16.3
Other	1914.0	2245	303.9	304.3	749.5	108.2	107.4	67.8	57.4	58.1	94.4	108.6
Trade balance	40.5	-60.5	2408.2	2605.3	2196	395.94	380.31	470.04	515.67	356.76	344.41	715.2
	Percentage change from previous quarter											
Total garment exports	-	-	-	-	-	-16.0	6.5	8.8	8.2	-25.2	16.6	59.5
Total exports	-	-	-	-	-	-1.7	-1.9	10.9	4.9	-23.6	4.7	57.1
Total imports	-	-	-	-	-	-6.5	2.8	-16.3	-10.5	4.6	25.5	8.0
	Percentage change from previous year											
Total garment exports	23.4	11.6	19.5	8.5	1.6	-5.4	-7.0	-11.4	5.3	-6.3	2.6	50.5
Total exports	22.5	12.0	19.1	8.2	1.5	12.1	-5.5	-3.0	12.1	-12.8	-7.0	46.1
Total imports	17.8	16.9	-79.6	8.3	82.2	30.9	-67.5	0.0	-28.0	-19.5	-1.7	26.8

Import data include tax-exempt imports. Sources: Department of Trade Preferences Systems, MOC and Customs and Excise Department, MEF (web site). *Updated data

Table 5. National Budget Operations on Cash Basis, 2004–10 (billion riels)

	2004	2005	2006	2007	2008	2009				2010		
						Q1	Q2	Q3	Q4	Q1	Q2	Q3
Total revenue	2126.0	2625.0	3259.2	1146.1	5290.0	1101.7	1252.7	1184.7	1346.1	1536.8	1341.1	1436.0
Current revenue	2107.0	2474.0	2881.8	1141.6	5210.7	1097.7	1245.7	1174.9	1337.7	1526.4	1330.9	1431.2
Tax revenue	1577.0	1911.0	2270.9	965.2	4409.9	947.4	1096.5	999.5	1224.1	1094.1	1143.8	1225.5
Domestic tax	-	-	-	661.8	3248.4	712.0	838.7	731.8	808.5	820.3	890.9	916.9
Taxes on international trade	-	-	-	303.5	1161.5	235.4	257.8	268.0	303.4	273.7	253.0	308.6
Non-tax revenue	530.0	563.0	610.9	176.4	800.8	150.3	149.2	176.1	225.7	432.4	187.1	205.7
Property income	-	-	-	13.6	78.0	13.1	9.7	27.5	14.3	237.0	20.2	19.5
Sale of goods and services	-	-	-	124.3	424.7	93.5	100.9	91.7	121.9	108.4	102.9	127.0
Other non-tax revenue	-	-	-	38.5	298.2	43.7	38.6	56.5	89.5	84.0	61.0	59.2
Capital revenue	19.0	152.0	377.4	4.5	79.3	4.0	7.0	9.8	8.4	10.4	10.2	4.8
Total expenditure	2932.0	3295.0	4174.7	1689.7	6297.8	1650.6	1766.1	2089.5	1877.1	2129.4	2154.8	2390.3
Capital expenditure	1163.0	1328.0	1638.1	807.4	2574.4	693.6	607.1	759.2	634.9	-	913.0	887.0
Current expenditure	1769.0	1967.0	2536.8	882.3	3809.0	752.4	1064.7	1290.4	1332.3	831.8	1168.1	1503.3
Wages	640.0	711.0	822.0	362.6	1397.0	327.4	515.5	526.6	642.5	-	545.6	562.4
Subsidies and social assistance	-	-	-	194.2	927.1	217.3	185.9	272.6	195.6	213.3	253.2	401.5
Other current expenditure	-	-	-	325.5	1384.9	207.7	363.2	491.2	494.3	449.6	369.3	539.4
Overall balance	-806.0	-706.0	-915.6	-543.6	-1007.8	-548.9	-513.4	-904.8	90.2	-592.6	-813.7	-875.6
Foreign financing	864.0	1127.0	1360.7	741.5	2055.1	507.8	326.7	484.5	-531.0	270.8	746.0	409.1
Domestic financing	148.0	-396.0	-445.1	-185.8	-127	-310.3	236.5	316.4	406.4	422.8	194.1	343.3

Source: MEF web site.

Table 6. Consumer Price Index, Exchange Rates and Gold Prices (period averages), 2004–10

	2004	2005	2006	2007	2008	2009				2010		
						Q1	Q2	Q3	Q4	Q1	Q2	Q3
(October-December 2006:100)	Consumer price index (percentage change over previous year)											
Phnom Penh - All Items	3.9	5.8	4.7	5.8	19.7	4.3	-4.8	-3.0	1.7	7.0	4.1	1.8
- Food & non-alcoholic bev.	6.4	8.6	6.4	9.9	33.1	6.1	-5.2	-2.7	1.8	7.8	3.6	1.9
- Transportation	9.7	11.4	9.1	5.8	19.4	-13.0	-16.5	-13.8	2.4	12.9	8.7	3.2
	Exchange rates, gold and oil prices (Phnom Penh market rates)											
Riels per US dollar	4016.3	4119.7	4119.0	4062.7	4058.2	4111.6	4128.6	4164.4	4157.3	4180.1	4209.0	4236.7
Riels per Thai baht	99.9	102.6	108.7	122.8	123.5	116.6	119.2	122.9	126.0	127.0	129.9	138.3
Riels per 100 Vietnamese dong	25.5	25.8	25.1	25.0	24.8	23.6	23.3	23.5	23.0	22.3	22.1	21.4
Gold (US dollars per chi)	46.3	54.0	70.6	83.2	105.9	105.6	110.7	123.2	133.8	133.9	142.9	150.1
Diesel (riels/litre)	2088.0	2633.0	3140.0	3262.3	4555.2	2873.7	3056.9	3867.0	3381.9	3599.5	3835.1	3936.6
Gasoline (riels/litre)	2833.0	3442.0	4004.0	4005.0	4750.8	3112.6	3452.4	3371.1	3940.2	4163.0	4358.7	4415.5

Sources: NIS, NBC and CDRI

Table 7. Monetary Survey, 2003–10 (end of period)

	2004	2005	2006	2007	2008	2009				2010		
						Q1	Q2	Q3	Q4	Q1	Q2	Q3
	Billion riels											
Net foreign assets	4797.0	5475.0	7224.0	10,735.0	10,345.0	11,222.0	12,611.0	13,869.0	14,655.0	15,514.6	12,610.9	16,903.0
Net domestic assets	-467.0	-450.0	-282.0	576.0	1513.3	1266.0	1249.0	1042.0	1573.0	1720.0	1785.3	1984.8
Net claims on government	-209.0	-421.0	-953.0	-1816.0	-2987.0	-3048.0	-2889.0	-2463.0	-2252.0	-2484.8	-2362.7	-2,120.4
Credit to private sector	1817.0	2394.0	3630.0	6386.0	9894.0	9814.0	10,129.0	10,127.0	10,532.0	11,146.7	11,859.1	12,479.8
Total liquidity	4330.0	5025.0	6942.0	11,311.0	11,858.0	12,488.0	13,859.0	14,912.0	16,228.0	17,234.5	18,267.1	18,887.8
Money	1153.0	1323.0	1658.0	2052.0	2399.0	2545.0	2695.0	2773.0	3120.0	3148.5	3115.1	3,061.7
Quasi-money	3177.0	3702.0	5285.0	9259.0	9459.0	9942.0	11,164.0	12,139.0	13,108.0	14,086.0	15,152.0	15,826.1
	Percentage change from previous year											
Total liquidity	30.0	16.1	38.1	62.9	4.8	3.7	9.1	18.7	36.9	38.0	6.0	3.4
Money	23.0	14.7	25.3	23.8	16.9	6.5	9.2	18.7	30.1	23.7	-1.1	-1.7
Quasi-money	32.8	16.6	42.8	75.2	2.2	2.9	9.1	18.7	38.6	41.7	7.6	4.4

Source: National Bank of Cambodia

Table 8. Real Average Daily Earnings of Vulnerable Workers (base November 2000)

	Daily earnings (riels)									Percentage change from previous year		
	2007	2007	2008	2009	2010					2010		
		Nov	Nov	Aug	Nov	Feb	May	Aug	Nov	May	August	Nov
Cyclo drivers	8075	9675	12628	7738	7194	9413	9570	8393	8942	7.6	8.5	24.3
Porters	8588	9119	9005	8159	9243	9953	9340	10,500	10,174	-9.5	28.7	10.1
Small vegetable sellers	8220	8552	9926	8323	7388	7826	8062	8380	9006	-17.5	0.7	21.9
Scavengers	5422	5727	4652	7087	4535	6238	7407	6452	6766	11.6	-9.0	49.2
Waitresses*	4482	4643	4327	4574	5380	5131	5380	6418	5562	23.8	40.3	3.4
Rice-field workers	5516	6426	8697	5785	4834	5358	6260	6177	5015	-12.2	6.8	3.7
Garment workers	7568	7240	6554	7410	7484	7557	7491	8470	7944	12.0	14.3	6.2
Motorcycle-taxi drivers	10,634	11,872	15,691	9569	9369	11,302	10,274	10,544	10,494	-15.9	10.2	12
Unskilled construction workers	6155	7777	8779	9444	7857	7699	9013	11,722	9838	-9.5	-7.5	25.2
Skilled construction workers	11,154	11,286	12,710	11,918	12,571	11,924	11,928	11,722	12,376	-12.9	-1.6	-1.6

* Waitresses' earnings do not include meals and accommodation provided by shop owners. Surveys on the revenue of waitresses, rice-field workers, garment workers, unskilled workers, motorcycle taxi drivers and construction workers began in February 2000. Source: CDRI