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Report Name: Grain and Feed Update

Country: Cambodia

Post: Phnom Penh

Report Category: Grain and Feed

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Report Highlights:

Cambodia's rice production in Marketing Year (MY) 2025/26 is forecast to decline due to falling rice prices and rising costs of competing crops. Farmers are adopting high-yield, short-duration Vietnamese rice varieties. Exports to key markets remain strong despite production challenges and domestic consumption continues to grow. The Cambodian government is providing loans to rice mills and investing in irrigation, storage, and milling to support higher-value rice exports.

RICE

Production, Supply, and Distribution

Rice, Milled	**2023/2024**		**2024/2025**		**2025/2026**	
Market Year Begins	**Jan 2024**		**Jan 2025**		**Jan 2026**	
Cambodia	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Area Harvested (1000 HA)	3580	3800	3860	3860	3800	3790
Beginning Stocks (1000 MT)	544	544	307	756	827	675
Milled Production (1000 MT)	7400	8052	8470	8489	8100	8217
Rough Production (1000 MT)	12131	13200	13885	13916	13279	13470
Milling Rate (.9999) (1000 MT)	6100	6100	6100	6100	6100	6100
MY Imports (1000 MT)	63	60	50	30	70	20
TY Imports (1000 MT)	63	60	50	30	70	20
TY Imp. from U.S. (1000 MT)	1	0	0	0	0	0
Total Supply (1000 MT)	8007	8656	8827	9275	8997	8912
MY Exports (1000 MT)	3700	3700	4000	4300	4100	4100
TY Exports (1000 MT)	3700	3700	4000	4300	4100	4100
Consumption and Residual (1000 MT)	4000	4200	4000	4300	4000	4400
Ending Stocks (1000 MT)	307	756	827	675	897	412
Total Distribution (1000 MT)	8007	8656	8827	9275	8997	8912
Yield (Rough) (MT/HA)	3.3885	3.4737	3.5972	3.6052	3.4945	3.5541

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Rice, Milled begins in January for all countries. TY 2025/2026 = January 2026 - December 2026

OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query

PRODUCTION

Table 1. Rice Area, Production, and Yield by Crop

MY	2023/2024			2024/2025 Estimated			2025/2026 Forecast		
	Harvested area	**Yield**	**Production**	**Harvested area**	**Yield**	**Production**	**Harvested area**	**Yield**	**Production**
	(THA)	**(MT/HA)**	**(TMT)**	**(THA)**	**(MT/HA)**	**(TMT)**	**(THA)**	**(MT/HA)**	**(TMT)**
Wet season	2,950	3.25	9,588	2,980	3.40	10,132	2,930	3.35	9,815
Dry season	850	4.25	3,613	880	4.30	3,784	860	4.25	3,655
Total	**3,800**	**3.47**	**13,200**	**3,860**	**3.61**	**13,916**	**3,790**	**3.55**	**13,470**

Source: Ministry of Agriculture, Forestry and Fisheries (MAFF); Post's estimates.
Thousand Metric Tons = (TMT), Thousand Hectares = THA

Note: The wet season is Cambodia's primary crop period. Sowing begins in May-June, with harvesting occurring in August-September for short- and medium-term varieties and October-January for longer-term varieties. Cambodia's secondary crop period, the dry season, starts sowing in November-December with harvest taking place from February to April. MY 2024/25 includes two crops: the 2025 wet season and the 2024-2025 dry season.

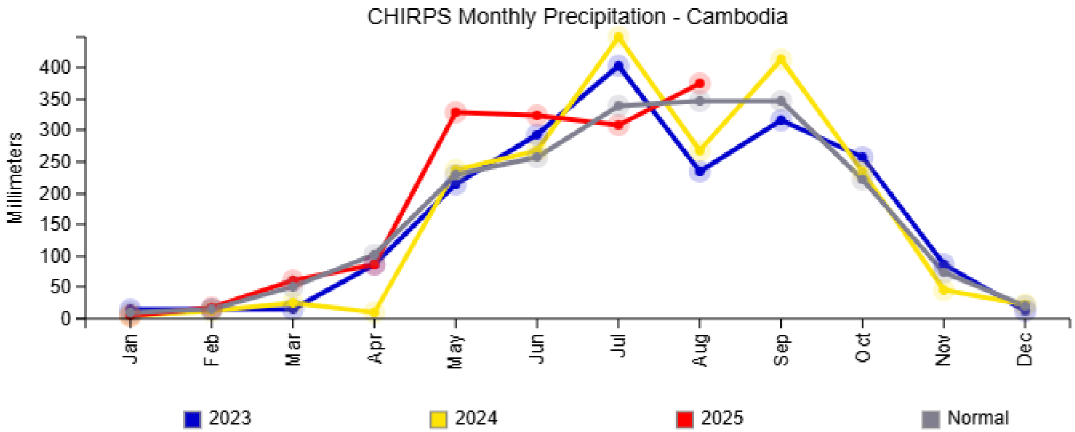
Post revised the MY 2025/26 production forecast to 13,470 TMT, citing a reduction in planted area driven by rising prices of competing crops and lower rice prices. Despite these challenges, yield is expected to remain stable as farmers utilize more available fertilizer and adopt improved rice varieties. Higher than normal water levels in the Mekong lowland area caused increased flooding this crop year, negatively impacting production in some areas.

Post slightly increased forecasted area and production for MY 2024/25 to 3,860 hectares and 13,916 TMT. This increase is due to expansion in dry-season planting area and the adoption of shorter-duration Vietnamese rice varieties, such as OM5451, OM380, and CL555. These varieties allow farmers to complete one production cycle in approximately 100 days, compared to the longer growth cycles of traditional Cambodian rice varieties.

Weather conditions in MY 2024/25 were mostly favorable for rice cultivation, helping maintain stable yields. Sufficient irrigation water from rainfall supported planting during the dry season. This resulted in a larger planting area than last year, although a water supply deficit was observed in the late season. Growth and yield conditions for dry-season rice remain strong, with the final yield expected to slightly surpass last year's levels, reaching an estimated 4.3 tons per hectare.

Planting activities during the wet season progressed faster than usual due to early rains, adequate water supply, and favorable sunshine. Although flooding occurred in the central and northern regions in mid-June, it did not significantly harm crop yields. The rice yield for the wet season is expected to reach 4.4 tons per hectare.

Figure 1. Monthly Precipitation in the Cambodia



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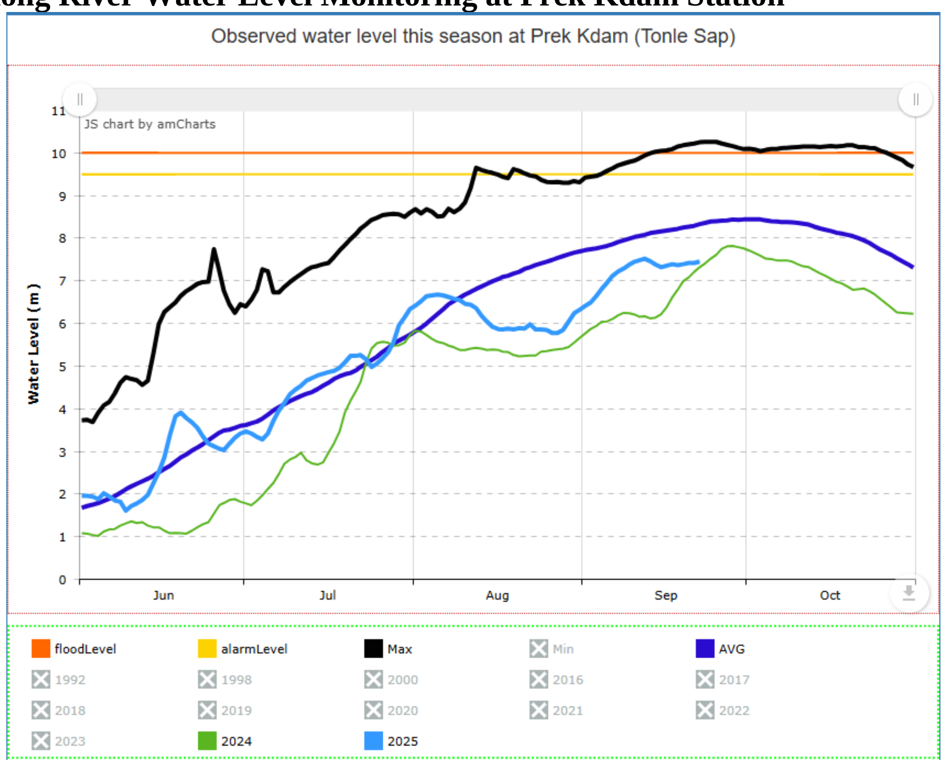
Source: [GADAS Analytics](), USDA Global Agricultural and Disaster Assessment System

Figure 2. Mekong River Water Level Monitoring at Prek Kdam Station



Source: [Mekong River Commission]()

Local prices have declined due to the high supply in global markets. With prices dropping below 600 riel/kg, a 20 percent decrease from last year, many farmers are facing significant financial losses. Some farmers are exploring alternative employment opportunities, adding pressure to the supply chain.

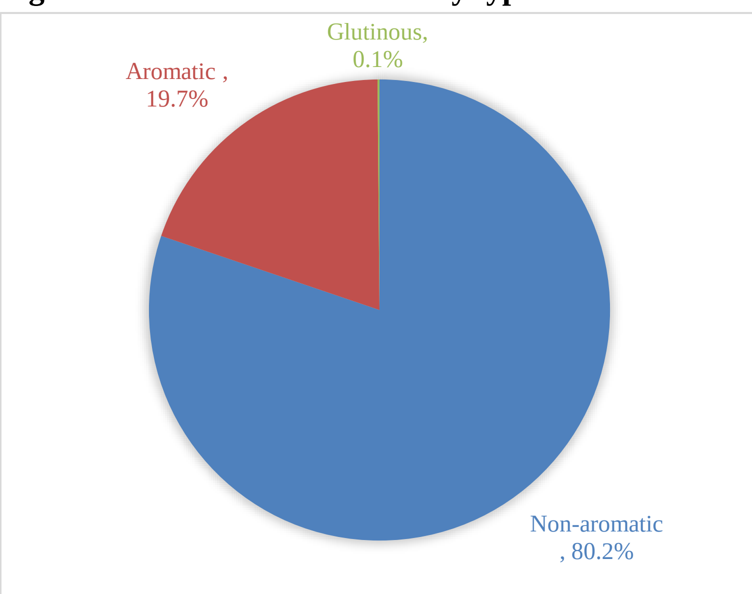
To address concerns over declining rice prices, the government has announced financial support for rice millers to purchase paddy from farmers. This support, primarily issued as loans, aims to stabilize the sector and mitigate farmer losses. However, industry contacts emphasize the need for both immediate measures, such as subsidies and price programs, and long-term investments in storage, milling infrastructure, and export diversification to ensure the sector's stability.

CONSUMPTION

Rice consumption in MY 2025/26 rose to 4.4 MMT of milled rice equivalent (MRE), up from 4.3 MMT in MY 2024/25. This increase was supported by population growth and the expansion of the tourism sector. Rice remains the staple food for Khmer citizens, with an average per capita consumption of approximately 250 kilograms annually.

Non-fragrant rice accounts for over 80 percent of rice production, while fragrant rice makes up 19.7 percent, and glutinous rice only 0.1 percent.[1] The limited production of glutinous rice presents a challenge, especially given its cultural significance during traditional festivals like Khmer New Year and Pchum Ben. To address this shortage, Cambodia relies on imports of glutinous rice from neighboring countries such as Laos, Thailand, and Vietnam.

Figure 3. Production structure by type of rice



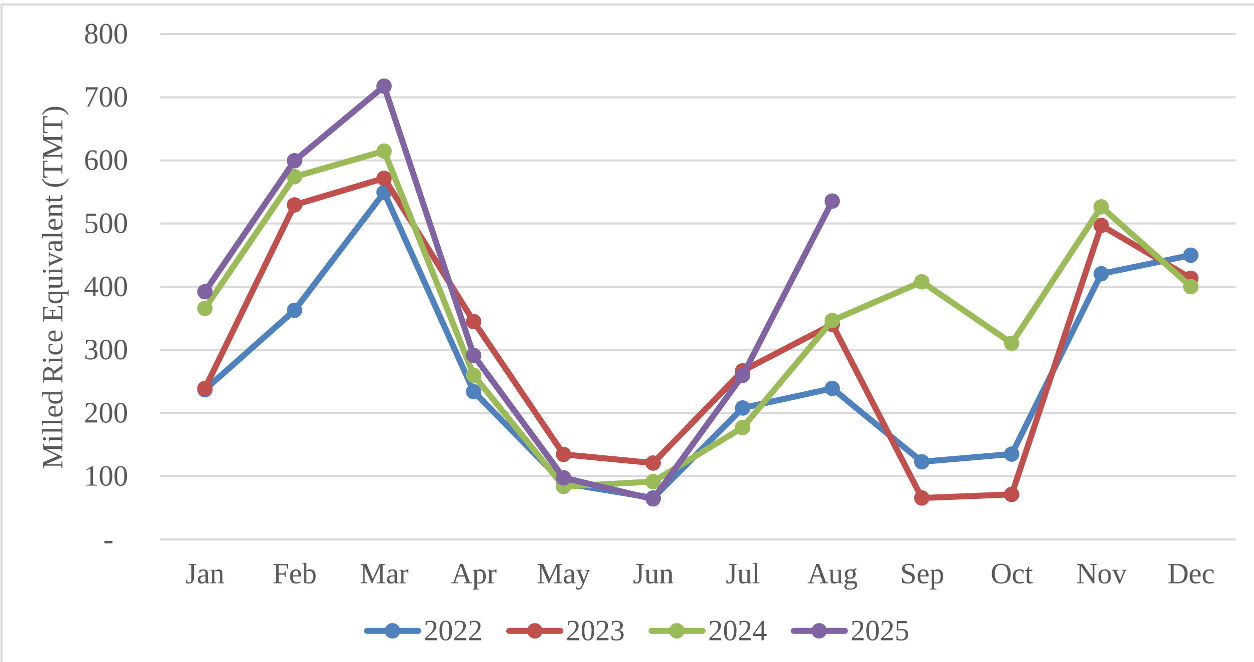
Source: Census of Agriculture Cambodia 2023. Released May 2025

[1] Census of Agriculture Cambodia 2023 released May 2025.

TRADE

Post revised the MY 2024/25 rice export forecast to 4.3 MMT of MRE, reflecting updated trends in export volume driven by strong demand from key markets such as Vietnam, China, and the European Union (EU). Despite the increase in MY 2024/25, exports for MY 2025/26 are forecast to decline slightly to 4.1 MMT, primarily due to reduced production and global price pressures.

Figure 4. Monthly Total Rice Exports, 2022-2025

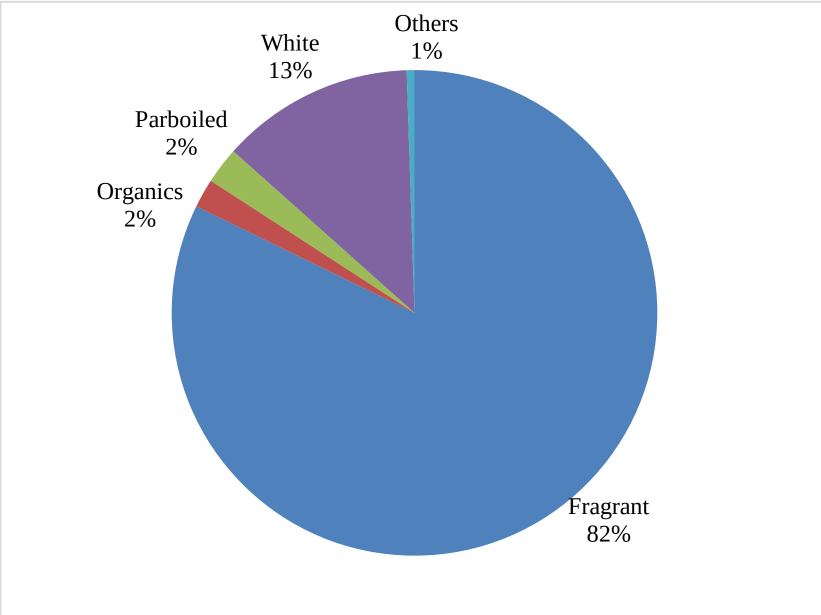


Source: Post Calculations, Trade Data Monitor LLC
Unit: Thousand Metric Tons of Milled Rice Equivalent (PSD-Rice, Milled)

Cambodia earned a total of $1.46 billion from paddy rice and milled rice exports in the first eight months of CY 2025 according to media reports. During this period, the country shipped a total of 474,805 tons of milled rice, up 16 percent from the same period last year. Cambodia exports milled rice to 66 countries worldwide. The EU and China remain the largest buyers, accounting for 42 percent and 24 percent of total exports, respectively. Other significant markets include Malaysia (7 percent), Gabon (6 percent), and the United Kingdom (6 percent).

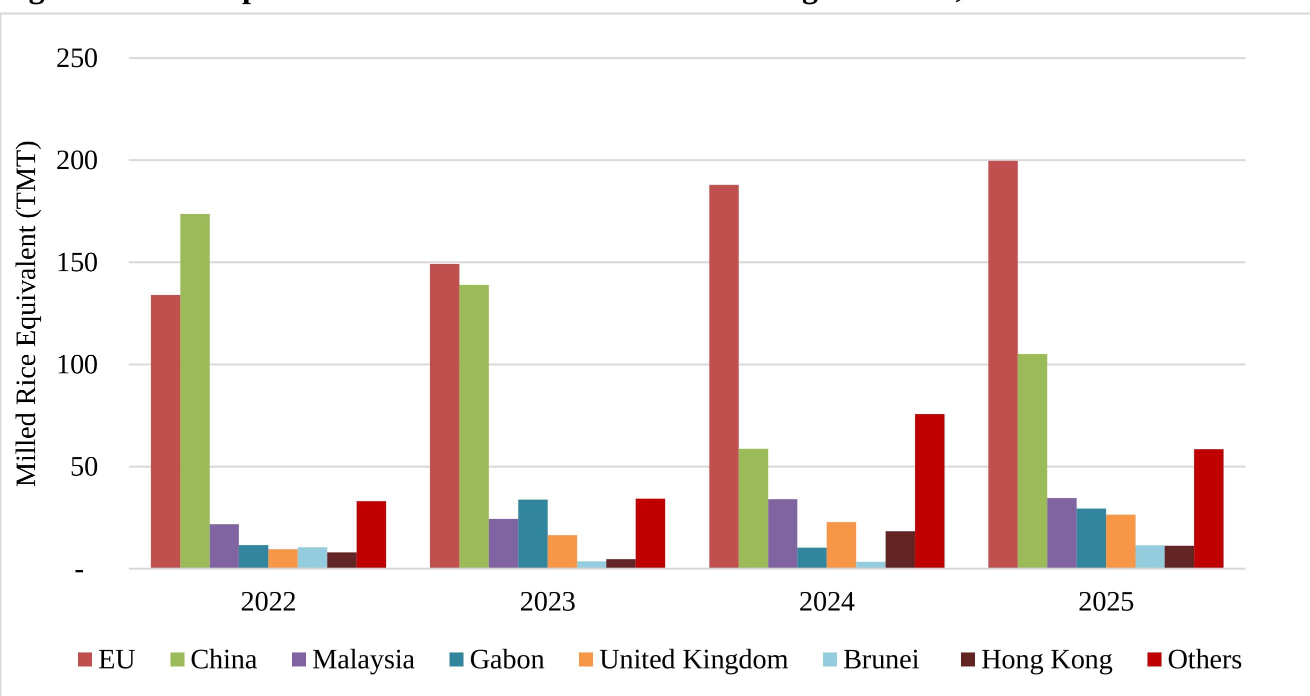
Fragrant rice accounted for 87 percent of milled rice exports, followed by long-grain white rice (13 percent), parboiled rice (2 percent), and organic rice (2 percent). The strong performance in fragrant rice exports underscores Cambodia's focus on high-value rice varieties for key markets such as the EU, China, and the United States.

Figure 5. Milled Rice Export Grade, January to August 2025



Source: Cambodia Rice Federation

Figure 6. Main export markets of Milled Rice in the first eight months, 2022-2025



Source: Post Calculations, Trade Data Monitor LLC

Table 2. Cambodia Yearly Rice Exports, 2022-2025

	2022	2023	2024	2025*
Vietnam	2,470	2,932	3,503	2,482
EU	208	247	294	199
China	281	198	90	105
Malaysia	46	54	70	35
United Kingdom	17	25	34	26
Gabon	20	45	25	29
Hong Kong	11	16	28	11
Australia	8	8	7	5
Brunei	15	7	11	11
Singapore	7	10	11	8
Others	35	54	86	45
Total	**3,114**	**3,597**	**4,159**	**2,957**

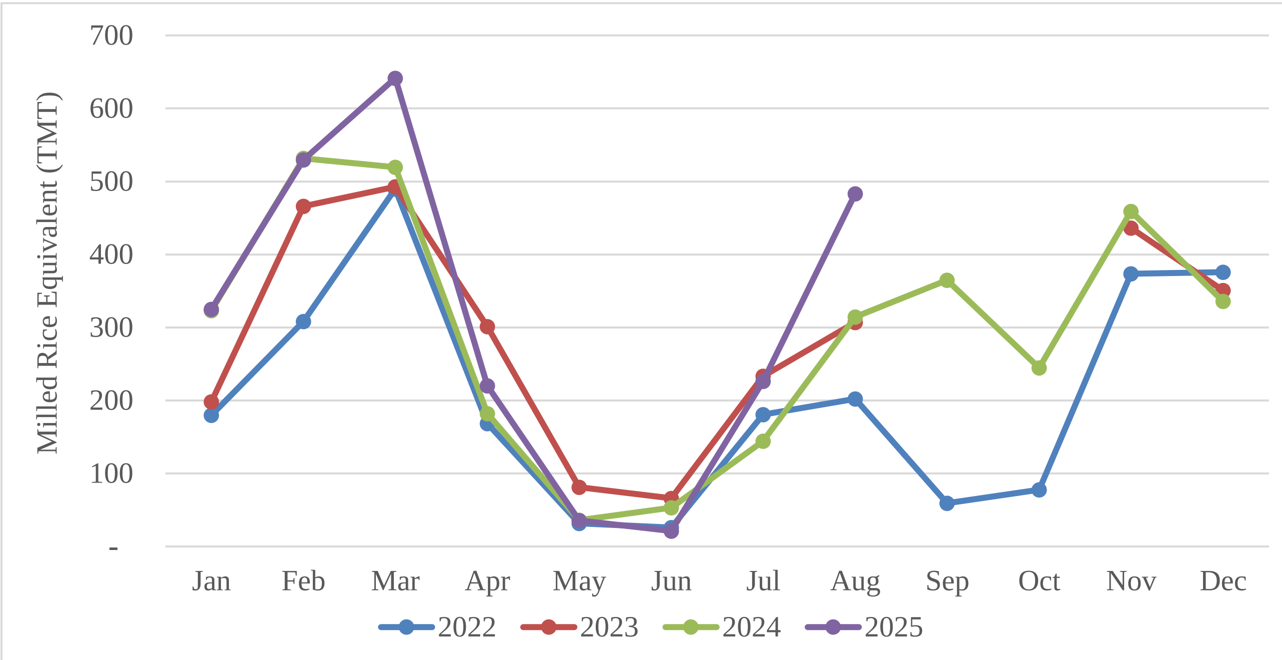
Source: Post Calculations, Trade Data Monitor LLC

Note: Unit: Thousand Metric Tons of Milled Rice Equivalent (PSD-Rice, Milled)
* Total exports for the first eight months of 2025

According to the Cambodia Rice Federation (CRF), Cambodia exported 4.84 million tons ($1.114 billion) of paddy rice to neighboring countries during the first eight months of 2025, primarily to Vietnam. Paddy rice traded across borders accounted for 75 percent of Cambodia's total rice exports during this period. Farmers often sell rice immediately after harvesting due to insufficient drying, storage, and milling capacity. Limited export logistics infrastructure further contributes to this practice, with traders transporting the paddy across borders by truck or boat.

According to Trade Data Monitor, LLC, Cambodia exported 2.482 MMT of paddy rice (converted to MRE), mainly to Vietnam in the first eight months of MY 2024/25. This volume represents an 18 percent increase compared to the same period last year, reaffirming Vietnam's position as Cambodia's primary export destination. Vietnam accounted for 88 percent of Cambodia's total rice exports in the first eight months of 2025.

Figure 7. Monthly Paddy Rice Exports, 2022-2025



Source: Post Calculations, Trade Data Monitor LLC
Unit: Thousand Metric Tons of Milled Rice Equivalent (PSD-Rice, Milled)

STOCKS

Post revised the ending stocks for MY 2025/26 down to 412,000 MT based on forecast production and demand. Storage remains both limited and costly for farmers, restricting stock levels. For MY 2024/25, ending stocks are lowered to 675,000 MT due to higher exports. Ending stocks for MY 2023/24 are revised up to 756,000 MT based on strong production.

Attachments:

No Attachments