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Global Market Analysis
International Production Assessment Division
Web: https://ipad.fas.usda.gov

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Commodity Intelligence Report

Cambodia Rice: MY 2024/25 Production Summary and MY 2025/26 Outlook

Cambodia rice production is positioned at number 11 of the top global producers and is set to achieve a new record at 8.47 million metric tons (mmt) (milled basis) for marketing year (MY) 2024/25. Rice production has grown exponentially since the mid-1990s after reaching self-sufficiency. Since then, production has increased more than 400 percent (see Figure 1). Although the Cambodian population consumes rice daily, Cambodia exports nearly half of their rice production and is ranked 5th among the global rice exporters (see Figure 2). Some of the driving factors that led to the rice productivity boom were modernization, expansion of market opportunities, and the end of decades-long political instability.

Modernization was introduced to Cambodia's rice value chain as a support mechanism that enabled the rice sector to achieve higher productivity. Investments in land expansion, enhanced farming practices, and new seed technologies were widely adopted, leading to rice sown area increases. As a result, the harvested area increased 108 percent since 1990. (See Figure 3).

Though rice is produced along the Tonle Sap Lake, the main rice producing provinces are situated at the southern and northeastern borders. Prey Veng is the nation's largest rice producing province, accounting for roughly 13 percent of production, followed by Takeo, Battambang, and Banteay Meanchey at 11 percent, 11 percent, and 9 percent, respectively (see Figure 4).

Cambodia rice is cultivated year-round, in two distinct growing seasons; a wet season crop followed by a dry season crop (see Figure 5). In the wet season, which is Cambodia's primary crop period, rice can achieve three sowing cycles. The names of these three cycles are associated with the rice variety and duration for each growing cycle, which is short (90-to-110-day growth period), medium (120-to-150-day growth period) and long-term (155 or longer day growth period). Sowing for the wet season crops begins in May to June. Harvest typically occurs from August to September for short and medium-term varieties and October to January for long-term varieties. In the dry season, which is Cambodia's secondary crop period, rice typically achieves one sowing cycle due to lack of water availability. Sowing begins in November to December with harvest occurring from February to April.

Wet season rice: Sowing operations began in May 2024, and the crop had an unfavorable start to the season. Delayed seasonal rains from the onset of the monsoon season through late May compounded with short periods of dry spells, impacted early sowing and development, most notably in the northern rice producing regions. However, more favorable weather conditions observed in early June enabled replanting activities and crop development to rebound from early adverse weather (see Figure 6). The *Association for Southeast Asian Nations Food Security Information Systems* (ASEAN FSIS) Rice Growing Outlook Report highlighted that sown area for the wet season crop exceeded the national planning intentions by 10 percent and was up 5 percent from the 2023/24 wet season sowing campaign. Above-average vegetative health conditions for the wet season rice were validated through the observations of satellite-derived NASA MODIS Percent Average Seasonal Greenness (PASG) throughout most of the rice growing regions, particularly in the south (see Figure 7).

Dry season rice: Sowing operations began in November 2024 and benefited from favorable weather observed during the latter part of the wet season. This provided adequate water supplies that enabled farmers to expand sowing operations this year, most notably in the southern areas (see Figure 8). Though there were isolated concerns of periods of low water availability, water conservation practices were instituted to mitigate large scale impacts on crop development. The ASEAN FSIS Rice Growing Outlook Report reported dry season rice sowing was up 8 percent compared to MY 2023/24. Additionally, the report highlighted that the dry season rice crops progressed under generally good conditions. Healthy vegetation vigor was observed using satellite-derived MODIS PASG in the major dry season rice areas, particularly in the southern provinces. Vegetation health indices were average-to-above average, highlighting the positive vegetation response of rice to adequate water supplies (see Figure 9).

Since 2019, there has been a drastic increase in dry season rice sown area. The sown area increase is attributed to enhanced water conservation practices, use of innovative seed technologies, and decreases in input costs. These factors have resulted in the expansion of dry season rice sowing and the ability to achieve higher yields. Validation of the increases in dry season rice area has been observed using satellite imagery. (See Figure 10).

For MY 2024/25, USDA estimates Cambodia rice production at a record 8.47 mmt (milled basis), up from 7.40 mmt in MY 2023/24. Harvested area is estimated at 3.86, up from 3.58 in MY 2023/24. USDA estimates yield (rough basis) at 3.59 tons per hectare (t/ha), up from 3.39 t/ha in MY 2023/24 (see Figure 11).

2025/26 Outlook

For MY 2025/26, USDA estimates Cambodia rice production at 8.10 mmt (milled basis), down 4 percent from MY 2024/25. Harvested area is estimated at 3.80 mha, down 2

percent from MY 2024/25. Yield (rough basis) is estimated at 3.49 t/ha, down 3 percent from MY 2024/25.

With the rice planting window for MY 2025/26 wet season underway, expectations of normal rainfall pattern will benefit potential rice yields. Early prospects for rice yields are expected to be on par with the 10-year trend but still down from the MY 2024/25 record. Current unfavorable prices could result in farmers opting to plant more profitable crops, such as pineapple and other fruits. As a result, lower potential yield prospects and reduced rice harvested area are expected to lead to a decrease in national rice production.

Contributions to this report by the USDA Foreign Agricultural Service Office of Agricultural Affairs in Cambodia are gratefully acknowledged.

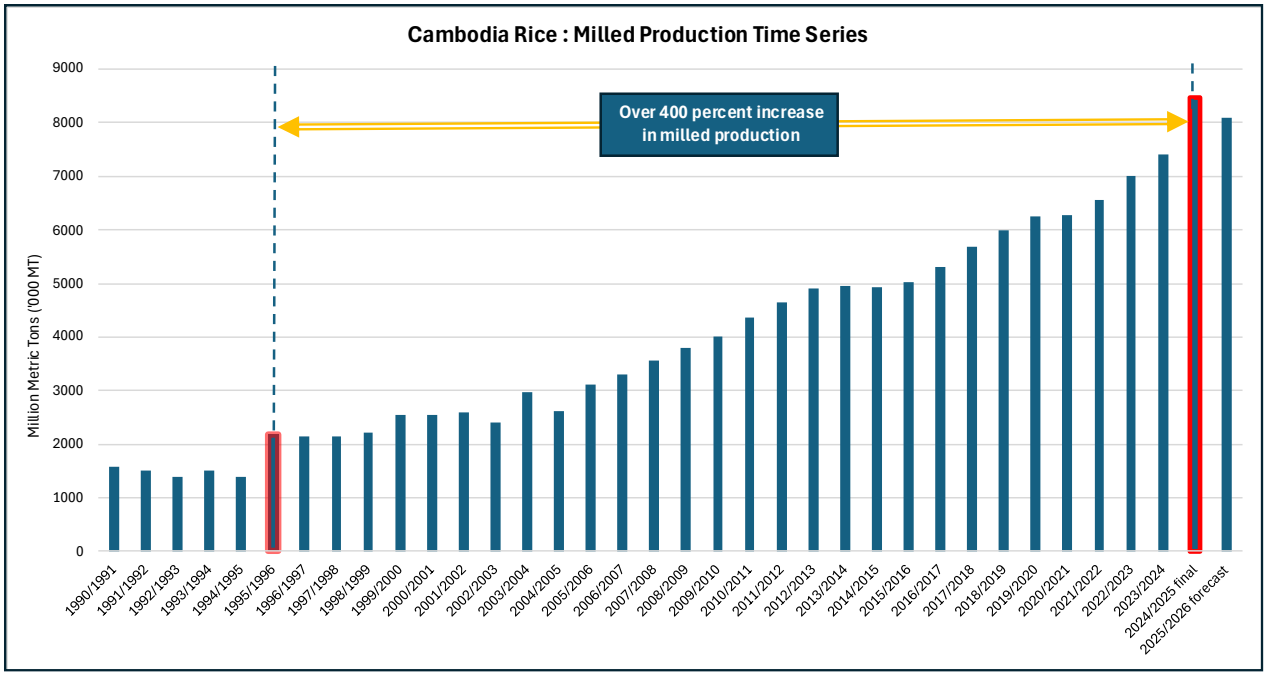

Figure 1. Cambodia rice (milled) production time series. Source: USDA PSD Online

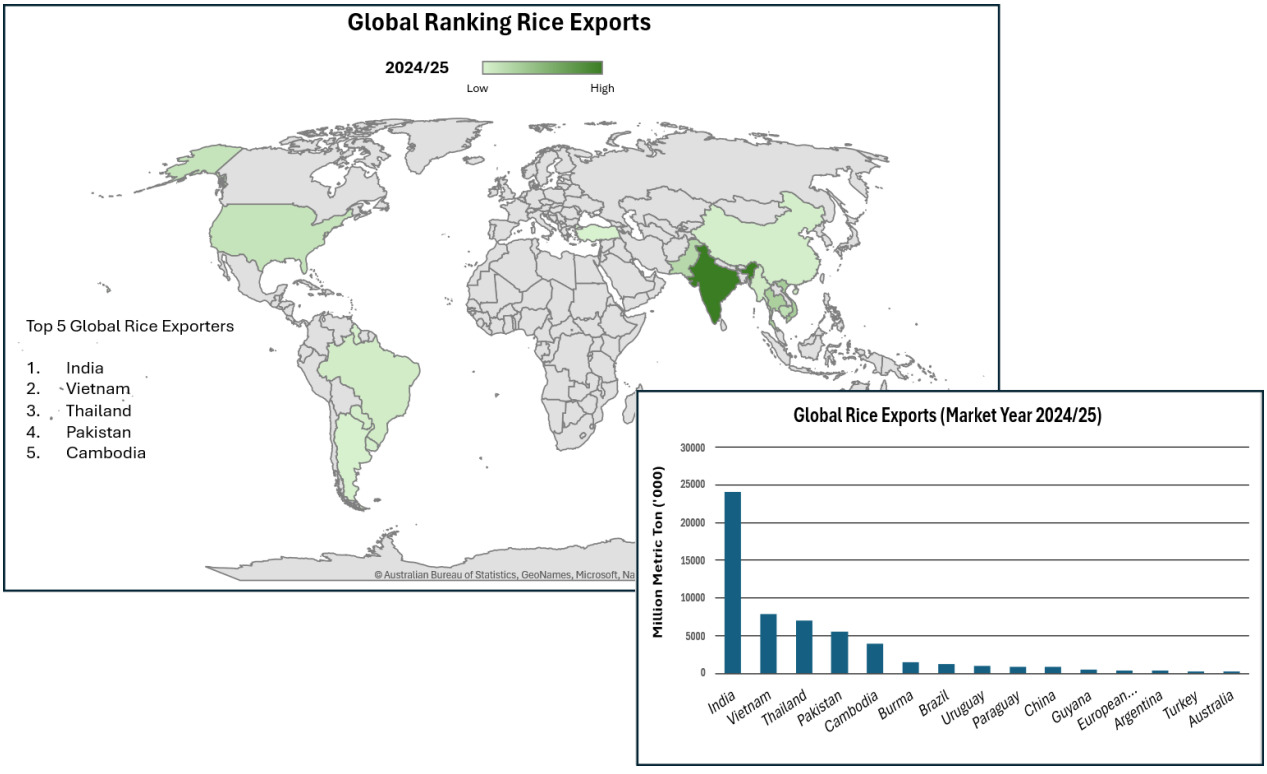

Figure 2. Ranking global rice exports. Source: USDA PSD Online

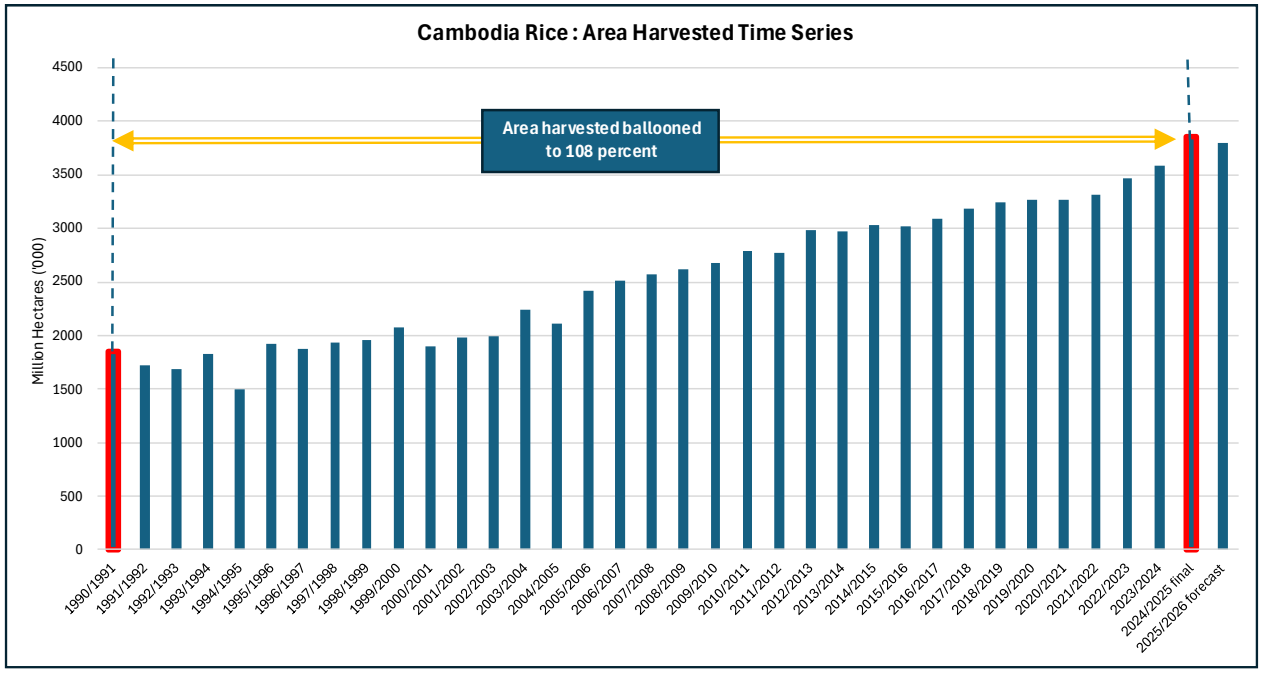

Figure 3. Cambodia rice area harvested time series. Source: USDA PSD Online

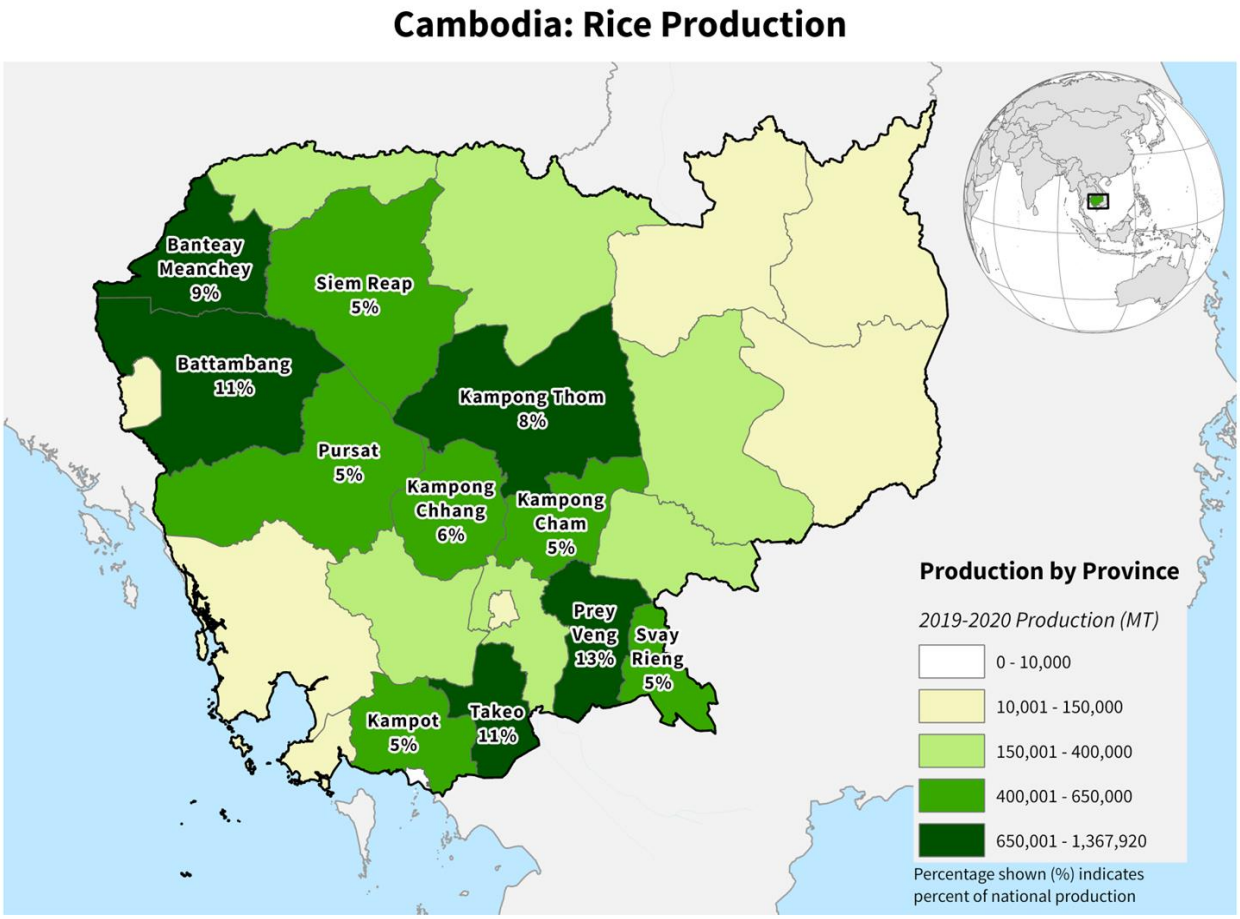

Figure 4. Cambodia rice production map by province. Source: Cambodia Ministry of Agriculture, Forestry and Fisheries Annual Report Statistics

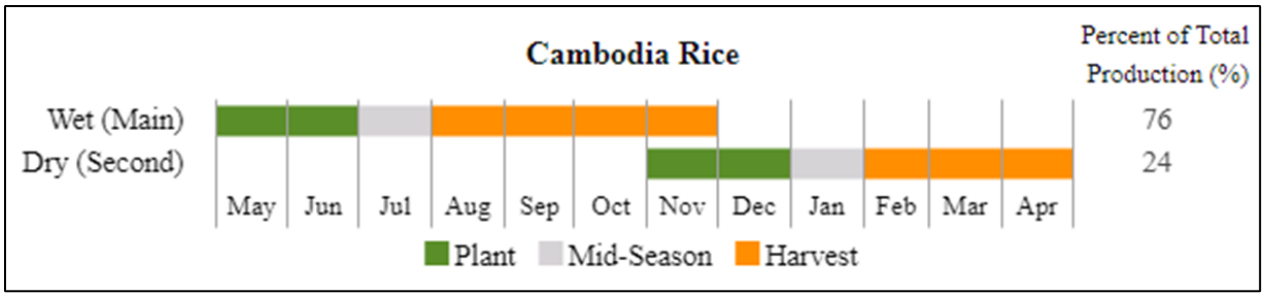

Figure 5. Cambodia seasonal calendar. Source: Food and Agriculture Organization – Global Information and Early Warning System

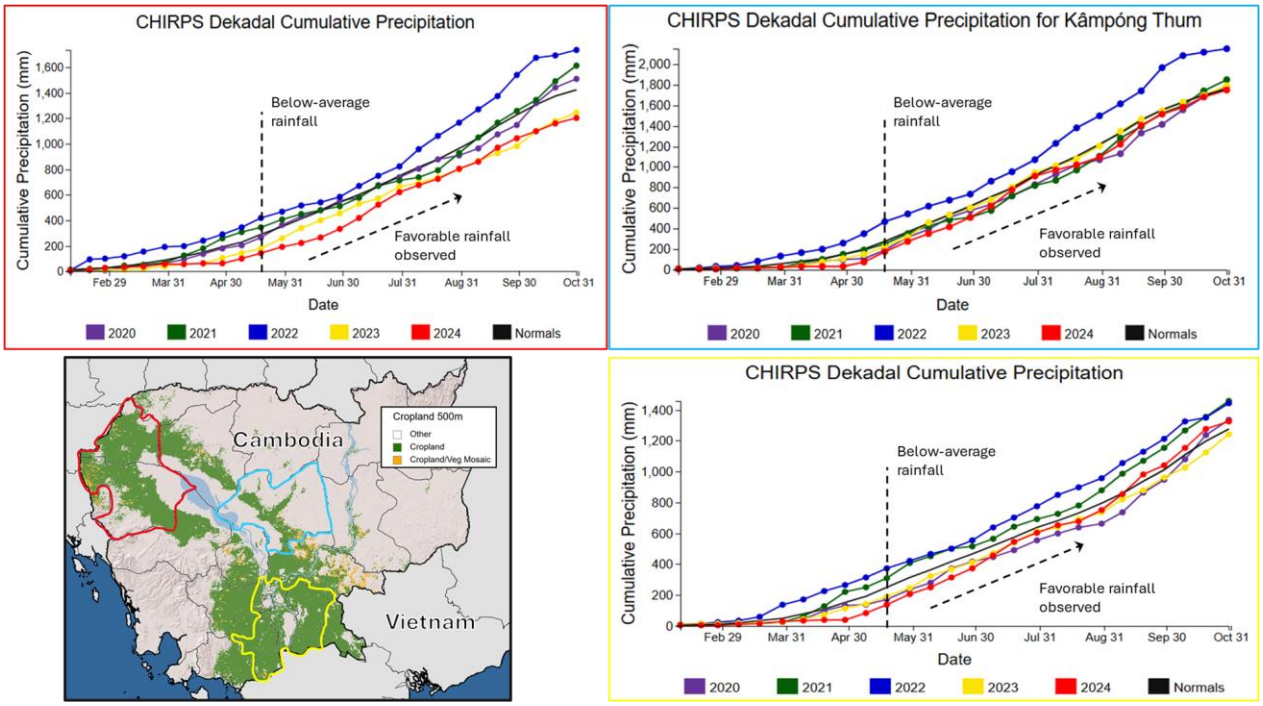

Figure 6. Observed seasonal rainfall over the major rice cropping provinces. Sources: 500-meter MODIS Land Cover dataset and Climate Hazards Group InfraRed Precipitation with Station data (CHIRPS)

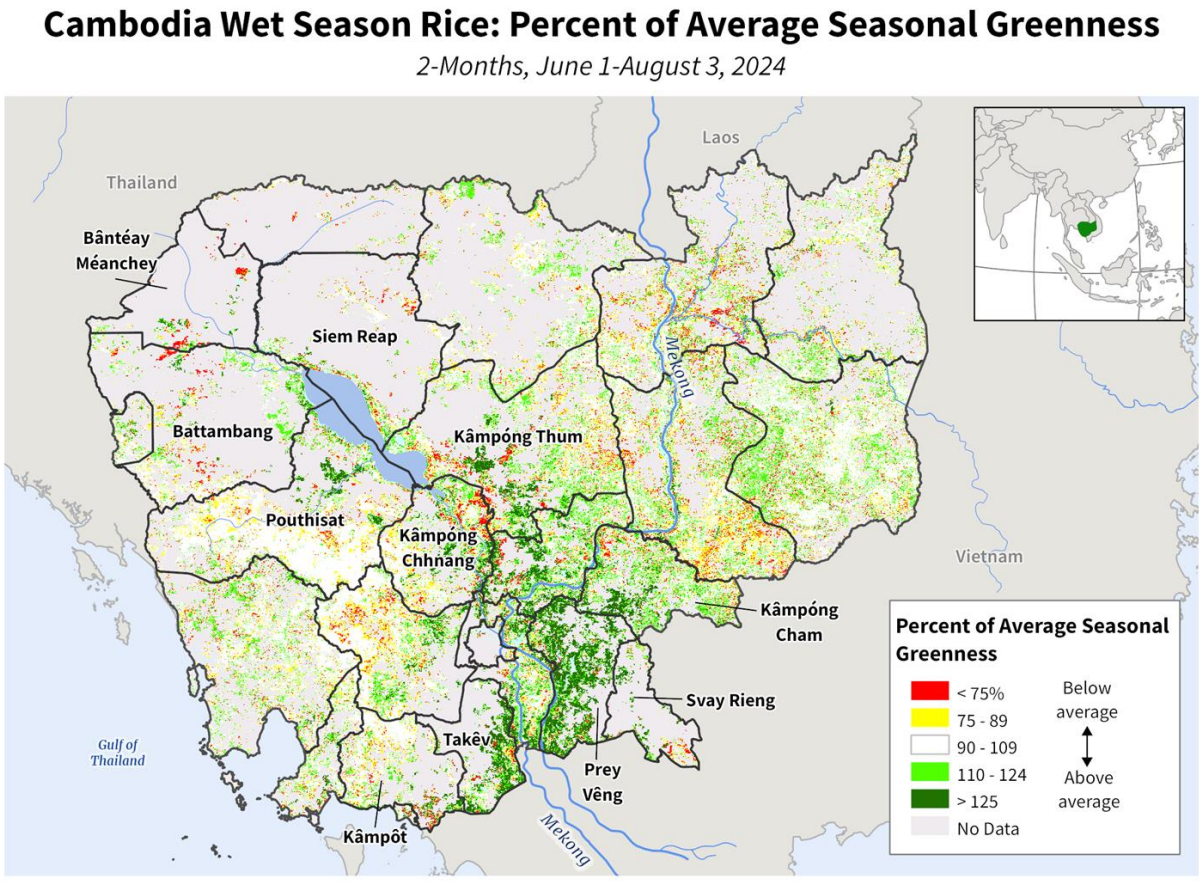

Figure 7. Vegetative indices validate above-average rice conditions. Source: NASA MODIS 2-Month Percent of Average Seasonal Greenness

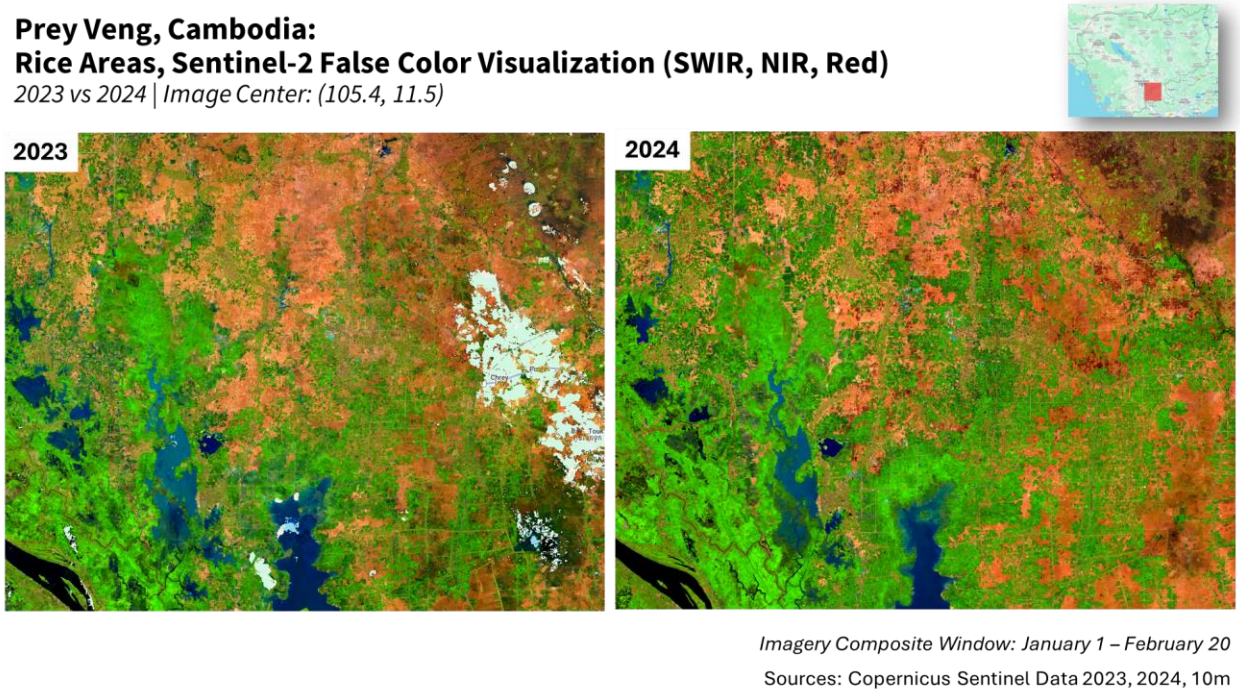

Figure 8. Dry season rice benefitted from adequate rainfall. Source: Copernicus Sentinel 10-meter Data 2023, 2024, 10m

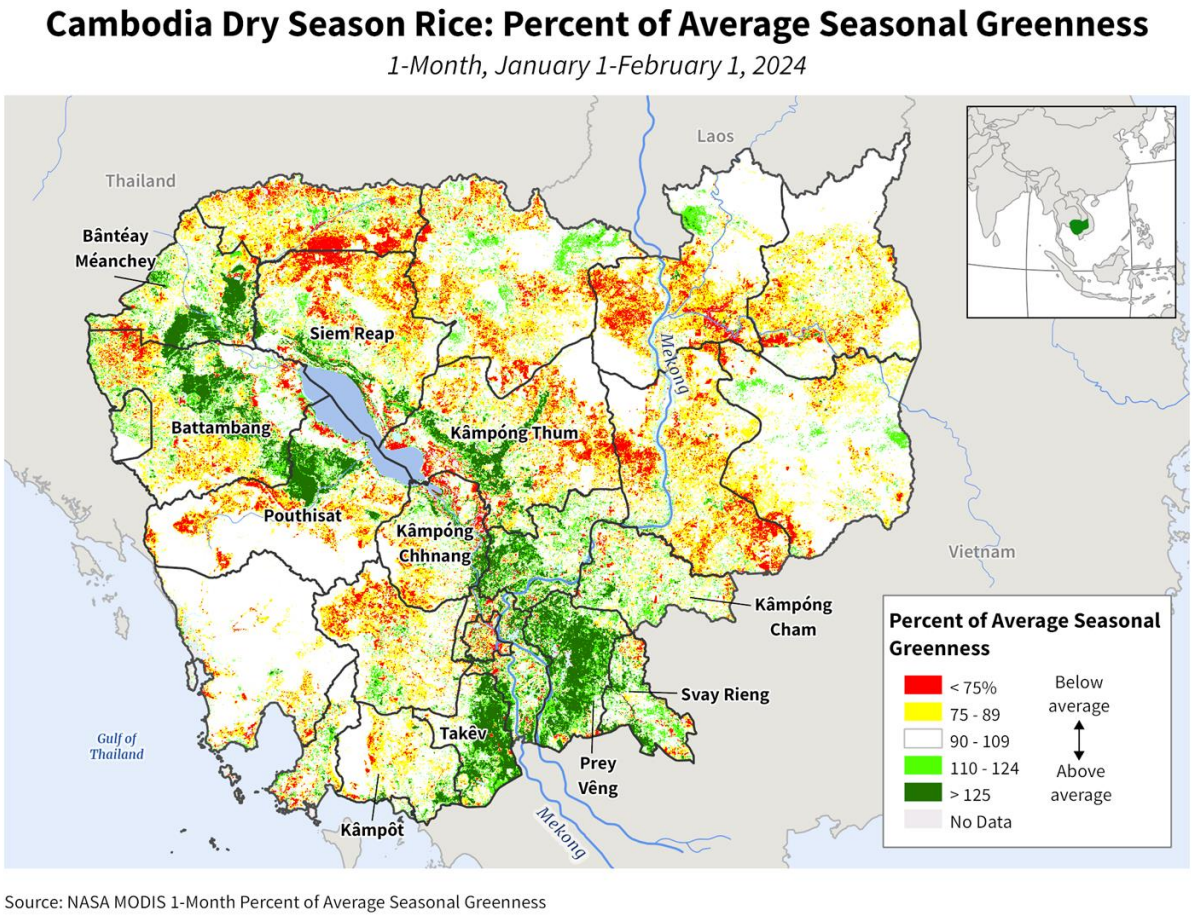

Figure 9. Vegetative indices validate above-average rice conditions. Source: NASA MODIS 2-Month Percent of Average Seasonal Greenness

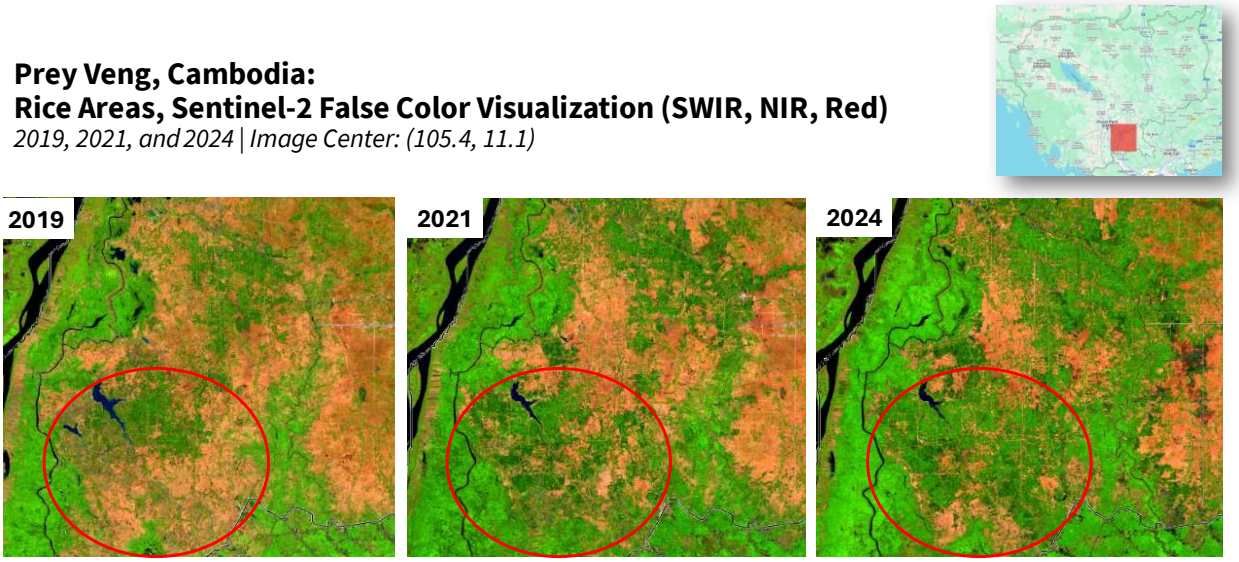

Figure 10. Temporal imagery highlighting rice area increases during the dry season. Source: Copernicus Sentinel 10-meter Data 2019, 2021, 2024

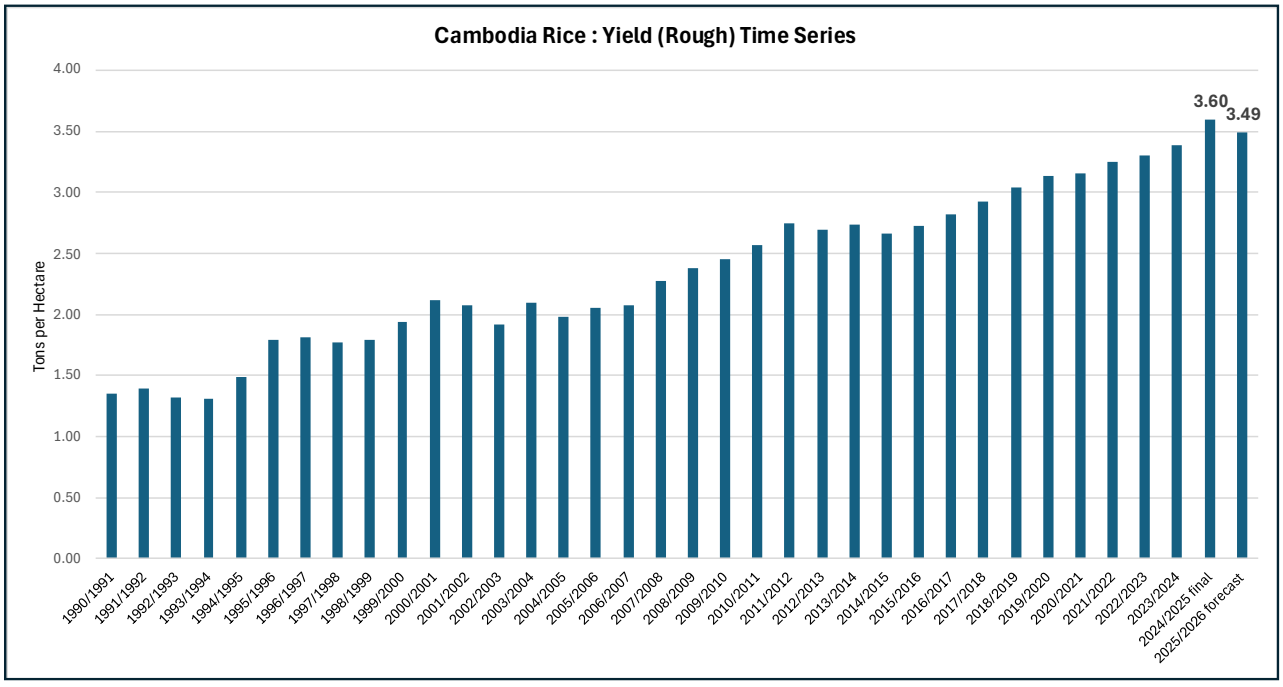

Figure 11. Cambodia rice yield (rough basis) time series. Source: USDA PSD Online

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