



Euromonitor  
International

# Cooking Ingredients and Meals in Cambodia

November 2025

Table of Contents

### EXECUTIVE SUMMARY

Sustained demand for cooking ingredients is increasingly characterised by healthier and more natural options

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

High and rising prices lead to growing price sensitivity

Growing popularity of olive oil

#### WHAT'S NEXT?

Urbanisation, population growth and an improving economy boost forecast period sales

Growing competition between local and international brands

Growing availability widens access to packaged products

#### COMPETITIVE LANDSCAPE

Thai Vegetable Oil PCL is the leading player present with its Healthy Chef brand

Wilmar International is the fastest-growing player in 2025

#### CHANNELS

Small local grocers is the leading channel for cooking ingredients and meals

Retail e-commerce registers the strongest growth

Chart 1 - Cooking Ingredients and Meals: Supermarket

Chart 2 - Cooking Ingredients and Meals: Supermarket

Chart 3 - Cooking Ingredients and Meals: Supermarket

Chart 4 - Cooking Ingredients and Meals: Supermarket

#### MARKET DATA

Table 1 - Sales of Cooking Ingredients and Meals by Category: Volume 2020-2025

Table 2 - Sales of Cooking Ingredients and Meals by Category: Value 2020-2025

Table 3 - Sales of Cooking Ingredients and Meals by Category: % Volume Growth 2020-2025

Table 4 - Sales of Cooking Ingredients and Meals by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Cooking Ingredients and Meals: % Value 2021-2025

Table 6 - LBN Brand Shares of Cooking Ingredients and Meals: % Value 2021-2025

Table 7 - Distribution of Cooking Ingredients and Meals by Format: % Value 2020-2025

Table 8 - Forecast Sales of Cooking Ingredients and Meals by Category: Volume 2025-2030

Table 9 - Forecast Sales of Cooking Ingredients and Meals by Category: Value 2025-2030

Table 10 - Forecast Sales of Cooking Ingredients and Meals by Category: % Volume Growth 2025-2030

Table 11 - Forecast Sales of Cooking Ingredients and Meals by Category: % Value Growth 2025-2030

#### COUNTRY REPORTS DISCLAIMER

#### EDIBLE OILS

Key Data Findings

2025 Developments

The essential role of edible oils in local cuisine supports value sales

Industry Performance

Edible oils embraced for their healthier qualities

Unpackaged animal fats remain the main fats used in cooking among the rural majority

What's Next?

Steady forecast period growth due to growing urbanisation and hectic lifestyles

Health and wellness trend shapes consumer preferences in edible oils

Sales of edible oils boosted by digital and technological advancements

## Competitive Landscape

Thai Vegetable Oil PCL leads with its Healthy Chef brand

Wilmar International with its Neptune brand experiences strong growth in 2025 at the expense of Healthy Chef

## Channels

Small local grocers remains the outright leading channel for edible oils

Strong growth of retail e-commerce as this channel grows from a low base

## Category Data

Table 12 - Sales of Edible Oils by Category: Volume 2020-2025

Table 13 - Sales of Edible Oils by Category: Value 2020-2025

Table 14 - Sales of Edible Oils by Category: % Volume Growth 2020-2025

Table 15 - Sales of Edible Oils by Category: % Value Growth 2020-2025

Table 16 - NBO Company Shares of Edible Oils: % Value 2021-2025

Table 17 - LBN Brand Shares of Edible Oils: % Value 2021-2025

Table 18 - Forecast Sales of Edible Oils by Category: Volume 2025-2030

Table 19 - Forecast Sales of Edible Oils by Category: Value 2025-2030

Table 20 - Forecast Sales of Edible Oils by Category: % Volume Growth 2025-2030

Table 21 - Forecast Sales of Edible Oils by Category: % Value Growth 2025-2030

## MEALS AND SOUPS

### 2025 Developments

Slowdown in sales of meals and soups due to strong preference for fresh food

### Industry Performance

Growing demand for convenient meal options among urban dwellers

Traditional soup is popular in the country making it difficult for packaged alternatives to compete

### What's Next?

Sales of meals and soups wane over the forecast period as consumers maintain their preference for fresh food

Growing health and wellness trend stimulates manufacturers to reformulate their brands

Frozen pizza and instant rice porridge remain popular ready meals over the forecast period

## Competitive Landscape

The niche status makes the competitive landscape indiscernible

Lack of new entrants and marketing activities further dampen consumer interest

## Channels

The expansion of modern grocery retailers widens consumer access to meals and soups

Retail e-commerce becomes more popular though remains niche for meals and soups

## Category Data

Table 22 - Sales of Meals and Soups by Category: Volume 2020-2025

Table 23 - Sales of Meals and Soups by Category: Value 2020-2025

Table 24 - Sales of Meals and Soups by Category: % Volume Growth 2020-2025

Table 25 - Sales of Meals and Soups by Category: % Value Growth 2020-2025

Table 26 - NBO Company Shares of Meals and Soups: % Value 2021-2025

Table 27 - LBN Brand Shares of Meals and Soups: % Value 2021-2025

Table 28 - Forecast Sales of Meals and Soups by Category: Volume 2025-2030

Table 29 - Forecast Sales of Meals and Soups by Category: Value 2025-2030

Table 30 - Forecast Sales of Meals and Soups by Category: % Volume Growth 2025-2030

Table 31 - Forecast Sales of Meals and Soups by Category: % Value Growth 2025-2030

## SAUCES, DIPS AND CONDIMENTS

### Key Data Findings

### 2025 Developments

Authentic affordable sauces are a mainstay in Cambodian cooking

### Industry Performance

The popularity of soy and fish sauces help sustain overall category growth

Dips plays a significant role in Cambodian cuisine

## What's Next?

Steady growth of sauces, dips and condiments over the forecast period

Growing role of health and wellness in sauces, dips and condiments

Environmental awareness boosts consumer interest in sustainable products

Competitive Landscape

Natural Agri-Products Cooperative leads in a fragmented category

Nestlé records strong growth through the global renown of its Maggi brand

Channels

Small local grocers benefits from neighbourhood local and easy consumer access

Retail e-commerce registers rapid growth thanks to investment by supermarkets and hypermarkets

Category Data

Table 32 - Sales of Sauces, Dips and Condiments by Category: Volume 2020-2025

Table 33 - Sales of Sauces, Dips and Condiments by Category: Value 2020-2025

Table 34 - Sales of Sauces, Dips and Condiments by Category: % Volume Growth 2020-2025

Table 35 - Sales of Sauces, Dips and Condiments by Category: % Value Growth 2020-2025

Table 36 - NBO Company Shares of Sauces, Dips and Condiments: % Value 2021-2025

Table 37 - LBN Brand Shares of Sauces, Dips and Condiments: % Value 2021-2025

Table 38 - Forecast Sales of Sauces, Dips and Condiments by Category: Volume 2025-2030

Table 39 - Forecast Sales of Sauces, Dips and Condiments by Category: Value 2025-2030

Table 40 - Forecast Sales of Sauces, Dips and Condiments by Category: % Volume Growth 2025-2030

Table 41 - Forecast Sales of Sauces, Dips and Condiments by Category: % Value Growth 2025-2030

## SWEET SPREADS

Key Data Findings

2025 Developments

Positive sales of sweet spreads

Industry Performance

Sweet spreads make gains through versatility

Honey benefits from its healthy credentials

What's Next?

Sweet spreads benefits from increasing integration into local consumption patterns

Health and wellness trend stimulates product innovation

Growing investment in digital marketing strategies promotes local honey

Competitive Landscape

Mondulkiri Coffee Co Ltd leads with its Mondulkiri brand

Mondulkiri Coffee Co Ltd registers the strongest growth thanks to its production of authentic local honey

Channels

Small local grocers remains by far the largest channel for sweet spreads

Modern grocery retailers achieves strong growth thanks to the development of retail e-commerce

Category Data

Table 42 - Sales of Sweet Spreads by Category: Volume 2020-2025

Table 43 - Sales of Sweet Spreads by Category: Value 2020-2025

Table 44 - Sales of Sweet Spreads by Category: % Volume Growth 2020-2025

Table 45 - Sales of Sweet Spreads by Category: % Value Growth 2020-2025

Table 46 - NBO Company Shares of Sweet Spreads: % Value 2021-2025

Table 47 - LBN Brand Shares of Sweet Spreads: % Value 2021-2025

Table 48 - Forecast Sales of Sweet Spreads by Category: Volume 2025-2030

Table 49 - Forecast Sales of Sweet Spreads by Category: Value 2025-2030

Table 50 - Forecast Sales of Sweet Spreads by Category: % Volume Growth 2025-2030

Table 51 - Forecast Sales of Sweet Spreads by Category: % Value Growth 2025-2030

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/cooking-ingredients-and-meals-in-cambodia/report](http://www.euromonitor.com/cooking-ingredients-and-meals-in-cambodia/report).