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Cambodia Foodservice - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-09-02 | 80 pages | Mordor Intelligence

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Report description:

Cambodia Foodservice Market Analysis

The Cambodia food service market reached USD 2.91 billion in 2025 and is expected to grow to USD 4.52 billion by 2030, at a compound annual growth rate (CAGR) of 9.20%. The market's expansion is driven by several factors. Urbanization, higher disposable incomes, and a growing middle class have increased consumer spending on dining experiences. The recovery of the tourism sector, marked by rising international arrivals, has boosted demand for both local Cambodian and international cuisine. The adoption of digital technologies, including food delivery platforms, cloud kitchens, and digital payments, has improved service accessibility and changed consumer behavior. Independent outlets offering local cuisine and chain restaurants introducing global food trends contribute to market growth. Increasing health awareness has created demand for organic, vegan, and functional food options. Infrastructure development and logistics improvements are addressing supply chain inefficiencies and enhancing connectivity. While the market faces challenges including labor shortages, fluctuating food prices, and intense competition, Cambodia's food service sector continues to develop, reflecting the country's economic growth and changing consumer preferences in Southeast Asia.

Cambodia Foodservice Market Trends and Insights

Growth of Tourism and Hospitality Sector

Cambodia's tourism and hospitality sector growth drives the expansion of the country's food service market. According to the

Ministry of Tourism, Cambodia received approximately 6.7 million international visitors in 2024, a 22.9% increase from 2023 . This increase in tourist arrivals has enhanced demand for diverse dining experiences, from traditional Cambodian cuisine to international offerings, expanding the market and encouraging foodservice providers to innovate. Tourist destinations like Phnom Penh and Siem Reap, with attractions such as Angkor Wat, draw visitors seeking local and modern dining options, benefiting both independent restaurants and chain establishments. The tourism growth supports the expansion of cafes, bars, street food vendors, and quick service restaurants, while enabling the development of food delivery services and cloud kitchens. The hospitality sector's expansion through new hotels, resorts, and tour services further increases foodservice demand by incorporating dining options within accommodations and tour packages.

Growing use of online food delivery apps and platforms

The increasing adoption of online food delivery apps and platforms is transforming Cambodia's food service market. Digital delivery platforms enhance consumer access to food through convenient, affordable, and personalized dining options. For instance, in January 2025, Grab's acquisition of Nham24 established a unified super-app ecosystem, integrating food ordering, payment, ride-hailing, and lifestyle services into a single platform. This integration improves user convenience and increases consumer engagement across urban areas. Moreover, the growth of Cambodia's digital food delivery segment aligns with the broader expansion of the country's digital economy. The Digital Economy and Business Committee reports that Cambodia's e-commerce revenue grew from USD 1,287.23 million in 2023 to USD 1,509.86 million, indicating rapid adoption of online platforms and digital payments . The combination of widespread smartphone usage, improved internet infrastructure, and an expanding digital ecosystem supports the continued growth of food delivery services in the market.

Food-Commodity Price Volatility and Shrink-Flation Risk

Price volatility in food commodities and the risk of shrinkflation constrain Cambodia's food service market, affecting cost management and customer satisfaction. The National Institute of Statistics reported price increases across major meat categories from April 2023 to March 2024, pork and beef prices increased by 0.4%, while chicken prices rose by 0.3%, contributing to a 0.3% overall increase in the meat category . These price fluctuations affect foodservice providers who depend on these essential ingredients. Small independent operators with limited margins must either increase menu prices or reduce profit margins to manage these cost pressures. While some operators implement shrinkflation by reducing portion sizes while maintaining prices, this strategy risks damaging customer loyalty and brand reputation. In Cambodia's competitive market, where customers have multiple dining options and increasing quality expectations, any decrease in perceived value can reduce repeat business. Operators face additional challenges in maintaining food quality and service standards while managing increasing input costs.

Other drivers and restraints analyzed in the detailed report include:

Rising interest in healthy, organic, vegan, and functional foods / Proliferation of Global and Regional Brands / Skilled Labor Shortage may hamper the growth /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Full-service restaurants hold a 54.21% market share in 2024, dominating the market through their comprehensive dining experiences. These establishments offer diverse menus encompassing traditional Cambodian cuisine, international dishes, and fine dining options. Their success stems from quality ambiance, personalized service, and social dining experiences that attract families and local communities. The expanding middle class, increasing urbanization, and government infrastructure improvements further support their market position. These restaurants maintain their competitive edge through menu innovation, health-focused options, and distinctive dining concepts.

Cloud Kitchen operations demonstrate a significant growth trajectory, achieving a 10.11% CAGR from 2025 to 2030. This expansion corresponds directly with technological advancement and contemporary consumer behavioral patterns. The systematic integration of online food delivery platforms, facilitated by widespread smartphone adoption and digital payment infrastructure, establishes cloud kitchens as an operationally efficient business model for addressing convenience-oriented consumer demand. The operational framework requires substantially lower capital expenditure compared to conventional restaurant establishments, primarily due to the absence of physical dining facilities, which enables expedited market expansion and culinary diversification capabilities.

Independent outlets hold a 76.29% market share in Cambodia's food service market as of 2024. Their success stems from strong connections to local tastes and cultural preferences. These establishments focus on traditional Cambodian cuisine, local ingredient sourcing, and competitive pricing that resonates with domestic customers. Their ability to adapt menus and maintain community relationships allows them to respond effectively to changing consumer preferences, including the increasing demand for healthy and sustainable options. Independent food service businesses have also enhanced their market presence through partnerships with local delivery platforms, expanding beyond traditional dine-in services.

Chained outlets, while holding a smaller market share, demonstrate robust growth with a CAGR of 12.32%. These establishments attract customers through standardized food quality, hygiene protocols, and consistent service levels, particularly appealing to urban and tech-savvy consumers who value reliability. Global and regional brands expand through franchise and partnership models to increase market presence. For instance, in June 2024, Malaysian halal-certified QSR chain Marrybrown entered Cambodia through a Memorandum of Understanding with SP QSR and Food Services Co. Ltd, aiming to serve the growing halal food and fast food segments in Cambodia.

The Cambodian Food Service Market is Segmented by Type (Full Service Restaurants, Quick-Service-Restaurants, Cloud Kitchen, Cafes and Bars, and Street Stalls / Kiosks), by Outlet (Chained Outlets, and Independent Outlets), by Service Model (Dine-In, Take-Away, Delivery, and Drive-Thru), by Cuisine Type (American, Asian, European, African, Middle Eastern, and Others). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Yum! Brands Inc. / Restaurant Brands International Inc. / Starbucks Corporation / Minor International PLC (The Pizza Company) / Thalias Co. Ltd / Domino's Pizza Inc. / Berkshire Hathaway Inc. (Dairy Queen) / Alsea SAB de CV / CKE Restaurants Holdings Inc. (Carl's Jr.) / Papa John's International Inc. / Jollibee Foods Corporation / Lotteria Co. Ltd / Foodpanda (Delivery Hero SE) / Texas Chicken (Church's) / Krispy Kreme Doughnut Corp. / Subway IP LLC / Gong Cha Group / KOI The / Brown Coffee & Bakery Co. Ltd /

Additional Benefits:

 The market estimate (ME) sheet in Excel format /
3 months of analyst support /

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