



November 2025



SAVING LIVES  
CHANGING LIVES

# MARKET SITUATION UPDATE

## Amid Cambodia-Thailand Border Conflict

### KEY FINDINGS

In November 2025, monitoring markets in Cambodia–Thailand border provinces opened normally and **remained functional**, showing strong resilience and stable availability of essential commodities, **although prices continued to fluctuate amid conflict-related uncertainty**.

The overall **cost of the Basic Food Basket\* across the five border provinces eased in November 2025**, falling 4.8% month-on-month (MoM) from October's peak and 7.5% year-on-year (YoY) compared to November 2024, especially in Preah Vihear and Oddar Meanchey.

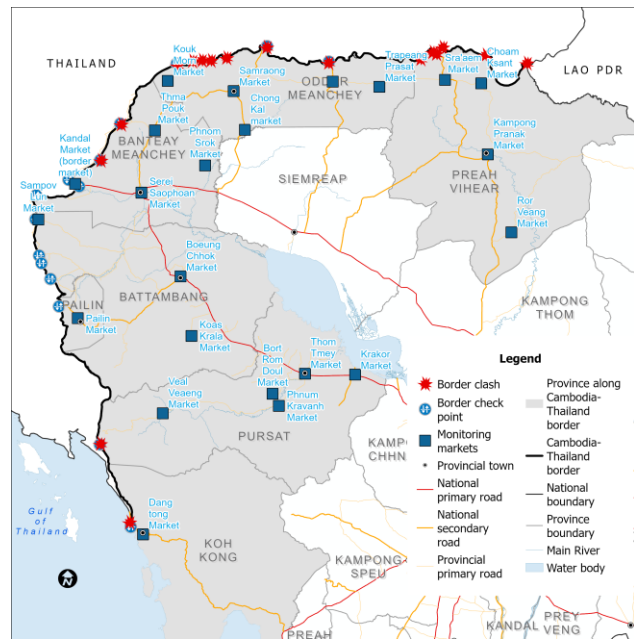
**Food prices eased in November 2025**, driven by moderate drops in mixed rice (–9.8% MoM), morning glory (–12.1% MoM), and pork (–4.1% MoM), **the main contributors to the lower cost of the food basket**. Minor increases in vegetable oil and sweet potatoes partially offset this relief, signaling mixed commodity dynamics.

However, **with new clashes reported in early December, this downward trend is unlikely to hold**, as conflict-driven disruptions are expected to push food prices upward, potentially reversing November's relief.

### BACKGROUND

Armed clashes have erupted along the Cambodia–Thailand border since mid-2025, initially in Oddar Meanchey and Preah Vihear provinces, with tensions spreading to other border areas. **The conflict has displaced over hundred thousand people and severely disrupted daily life in border communities**. Food security has been deeply impacted as border closures and restricted mobility halted cross-border trade, limiting access to affordable food and essential goods.

To better understand the impact of the conflict and border closures on market, in October 2025, WFP Cambodia expanded its remote market monitoring to **23 markets located within seven provinces along the Cambodia–Thailand border** (see map on the right). This effort aims to track potential food price fluctuation and disruptions affecting vulnerable households living in the conflict affected provinces.



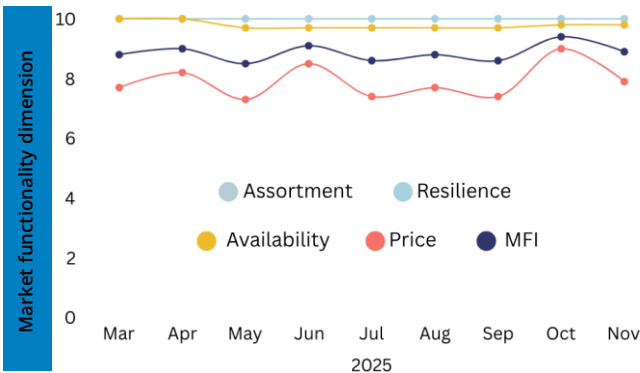
Source: The international border is delineated in accordance with United Nations-approved boundary.

Disclaimer: The designations employed and the presentation of material in the map(s) do not imply the expression of any opinion whatsoever of WFP concerning the legal or constitutional status of any country, territory or sea area, or concerning the delimitation of frontiers.

\* Information is in the second page.

## Market functionality

The **Market Functionality Index<sup>1</sup> (MFI)**, developed by WFP, **measures how well markets operate in crisis or recovery contexts**. By tracking MFI scores over time, humanitarian actors can assess the feasibility of cash or voucher programs, monitor market recovery and resilience, and design interventions to strengthen market systems.



The figure above illustrates the MFI trajectory from **23 monitored markets across seven Cambodia-Thailand border provinces**.

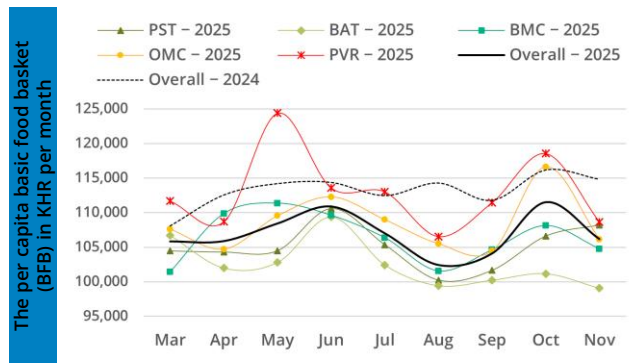
In **November 2025**, markets in the monitored area continued to demonstrate **strong functionality**, with an overall MFI score of 8.9, **slightly easing from October's peak** of 9.4. This moderation was **driven primarily by a decline in the Price stability indicator**, which fell by 1.1 points (from 9.0 to 7.9). Price stability remains the most sensitive component, strongly correlated with overall market performance, and **reflects the impact of conflict-related disruptions on trade flows and transport costs**.

Conversely, **all other dimensions held steady at near-optimal levels**, signaling continued diversity of food commodities and robust supply chain resilience despite the ongoing cross-border tensions.

## Cost of basic food basket

The per capita **basic food basket<sup>2</sup> (BFB)** is calculated to assist with **interpreting the impact of monthly food price changes on the cost of a basic diet** consumed by Cambodian households.

This section covers basic food basket costs in border provinces, excluding Pailin and Koh Kong due to limited data.



In **November 2025**, the overall cost of the Basic Food Basket across the five monitored border provinces stood at KHR 106,000 (USD 25.8) per person per month, marking a **4.8% decrease month-on-month** from October's peak. **Compared to the same month in 2024, the basket cost is 7.5% lower**, signaling some relief for households despite ongoing tensions.

The decline was broad-based across provinces, led by **OMC (-9.0%)** and **PVR (-8.3%)**, with **BMC (-3.1%)** and **BAT (-2.1%)** also easing. **PST** was the outlier, **rising 1.5%** driven by higher prices for morning glory, vegetable oil, and sweet potatoes, which partially cushioned the overall drop.

**PVR and OMC** consistently rank at the top of the cost range and exhibit the greatest volatility, making them critical provinces for monitoring. For detail price trends and changes across all monitored commodities, please refer to Table 1 below. **With new clashes reported in early December 2025, further upward pressure on food prices is highly likely.**

<sup>1</sup> The market functionality index (MFI) measures the functionality of monitored markets along the following key dimensions: assortment of essential goods, physical availability of goods in sufficient quantities, affordable and stable-predictable prices, and the underlying resilience of supply chains. Each dimension in the reduced MFI is indexed on a scale of 0 to 10, with a higher value indicating better market functionality at the time of monitoring. Overall MFI is an aggregation of the four dimensions

<sup>2</sup> The cost of the WFP basic food basket (BFB) is calculated to assist with interpreting the impact of monthly changes in food commodity prices on the cost of a basic diet consumed in Cambodia—such as rice, pork, fish, eggs, morning glory, sweet potatoes, and vegetable oil.

# Table 1: Retail prices and changes as of November 2025

Food commodity	Unit	Apr'25	May'25	Jun'25	Jul'25	Aug'25	Sep'25	Oct'25	Nov'25	Change compared to Oct 2025	Change compared to Aug 2025	Change compared to Nov 2024
<b>Mixed Rice*</b>	<b>KG</b>	<b>2,320</b>	<b>2,189</b>	<b>2,171</b>	<b>2,200</b>	<b>2,159</b>	<b>2,000</b>	<b>2,209</b>	<b>1,993</b>	↓ -9.8%	↓ -7.7%	↓ -25.0%
30-35% broken rice	KG	3,000	2,167	2,214	2,263	2,150	2,075	2,050	1,800	↓ -12.2%	↓ -16.3%	↓ -27.0%
<b>Snakehead fish (Live)*</b>	<b>KG</b>	<b>10,800</b>	<b>10,733</b>	<b>10,792</b>	<b>10,688</b>	<b>10,750</b>	<b>10,385</b>	<b>10,759</b>	<b>10,595</b>	→ -1.5%	→ -1.4%	↓ -7.4%
Trey Pra (Live)	KG	7,361	7,733	7,448	7,531	7,781	7,333	7,995	7,819	→ -2.2%	→ 0.5%	↑ 10.6%
Catfish (Live)	KG	8,214	8,500	8,611	8,905	9,167	8,786	9,240	8,897	→ -3.7%	→ -2.9%	↑ 9.3%
Dried snake fish	KG	26,143	26,625	29,714	28,333	27,000	27,929	26,282	27,583	→ 5.0%	→ 2.2%	↓ -7.0%
Broahok	KG	7,625	8,000	7,500	7,875	7,917	7,600	9,200	8,667	↓ -5.8%	↑ 9.5%	↑ 11.1%
Trey Por	KG	9,857	11,000	11,143	10,333	10,250	10,238	10,802	11,067	→ 2.4%	↑ 8.0%	↑ 30.2%
Red tailed catfish	KG	-	-	-	-	38,000	-	-	-	•	•	•
Trey Sandai	KG	-	15,000	-	-	39,000	-	20,000	-	•	•	•
<b>Pork with fat*</b>	<b>KG</b>	<b>18,643</b>	<b>18,938</b>	<b>18,370</b>	<b>18,222</b>	<b>17,542</b>	<b>16,792</b>	<b>16,316</b>	<b>15,653</b>	→ -4.1%	↓ -10.8%	→ 1.3%
Pork ribs	KG	17,952	18,917	18,519	17,800	17,958	16,958	16,246	15,074	↓ -5.7%	↑ 16.7%	↑ 11.1%
Pork bone	KG	15,190	15,229	14,722	14,463	14,000	13,646	12,851	15,000	→ -3.2%	•	↑ 15.4%
Pork legs	KG	14,881	15,188	14,704	14,521	14,125	13,896	12,956	15,250	↓ -5.1%	↑ 6.0%	↑ 6.4%
Beef with fat	KG	14,083	13,400	14,125	12,583	12,917	15,333	15,990	15,792	→ -2.8%	↓ -12.1%	→ -2.9%
Chicken meat (Farm)	KG	18,000	13,875	14,000	15,000	-	12,000	15,500	12,278	→ -4.5%	↓ -12.3%	↓ -8.7%
Chicken meat (CP)	KG	15,500	13,500	14,167	15,139	14,389	15,556	16,074	12,361	→ -4.6%	↓ -12.5%	↓ -7.9%
<b>Duck egg*</b>	<b>10 pcs</b>	<b>4,583</b>	<b>4,867</b>	<b>5,600</b>	<b>5,633</b>	<b>5,069</b>	<b>4,875</b>	<b>5,417</b>	<b>5,379</b>	→ -0.7%	↑ 6.1%	↑ 14.7%
Salty duck egg	10 pcs	6,400	6,467	7,150	7,688	7,100	6,700	7,339	7,188	→ -2.1%	→ 1.2%	↑ 14.1%
<b>Vegetable Oil*</b>	<b>5 L</b>	<b>29,375</b>	<b>29,214</b>	<b>29,250</b>	<b>29,788</b>	<b>29,310</b>	<b>29,200</b>	<b>28,239</b>	<b>28,750</b>	→ 1.8%	→ -1.9%	→ 3.0%
Iodized salt	KG	1,333	1,436	1,408	1,367	1,417	1,100	1,596	1,492	↓ -6.5%	↑ 5.3%	↑ 6.5%
Fish sauce (Lobster)	730 ml	3,500	3,380	3,400	3,500	3,400	3,375	3,000	3,500	↑ 16.7%	→ 2.9%	→ 2.9%
Ground nut	KG	9,917	9,857	10,143	10,500	9,524	10,800	9,400	9,519	→ 1.3%	→ -0.1%	↓ -6.2%
Soybean	KG	4,375	5,333	5,000	4,500	-	-	6,381	6,000	↓ -6.0%	•	↑ 14.3%
Green bean/mung bean	KG	5,542	5,750	5,708	5,875	6,048	6,250	6,125	6,297	→ 2.8%	→ 4.1%	→ 1.6%
<b>Morning glory*</b>	<b>KG</b>	<b>2,450</b>	<b>3,125</b>	<b>3,630</b>	<b>3,000</b>	<b>2,288</b>	<b>3,130</b>	<b>4,078</b>	<b>3,583</b>	↓ -12.1%	↑ 56.6%	→ -1.1%
Carrot	KG	3,083	3,458	3,700	3,208	3,350	3,875	3,824	3,697	→ -3.3%	↑ 10.4%	↓ -13.7%
Ivy gourd leave	KG	4,500	6,063	4,958	6,350	5,500	5,750	5,409	5,167	→ -4.5%	↓ -6.1%	↑ 6.5%
Moringa leaves	KG	5,167	3,300	5,000	2,733	6,000	3,940	4,417	4,333	→ -1.9%	↓ -27.8%	↓ -16.3%
Chinese spinach	KG	3,000	5,583	5,083	3,667	3,600	5,292	5,642	5,472	→ -3.0%	↑ 52.0%	↑ 13.2%
Pak Choi	KG	2,929	5,500	5,200	3,792	3,750	5,042	5,279	4,903	↓ -7.1%	↑ 30.7%	→ 2.2%
Chinese flowering cabbage	KG	3,143	5,250	5,067	3,625	3,600	4,542	5,103	5,083	→ -0.4%	↑ 41.2%	↑ 9.8%
Mustard Greens	KG	3,083	4,800	4,833	3,625	3,600	4,083	4,686	4,500	→ -4.0%	↑ 25.0%	↑ 5.3%
Amaranthus	KG	3,571	6,500	4,750	3,875	4,050	3,958	5,096	5,593	↑ 9.7%	↑ 38.1%	↑ 29.1%
Ngob leaves	KG	3,500	5,000	5,000	5,000	5,500	3,750	5,833	7,333	↑ 25.7%	↑ 33.3%	↑ 118.9%
Pumpkin leaves	KG	3,875	3,667	4,813	5,400	5,000	4,663	4,500	5,000	↑ 11.1%	→ 0.0%	↑ 31.6%
Pumpkin fruit	KG	2,321	2,375	2,133	1,875	2,488	2,375	2,672	2,742	→ 2.7%	↑ 10.2%	↑ 18.1%
Bottle gourd	KG	-	-	-	-	-	-	1,750	-	•	•	•
Wax gourd	KG	1,958	2,667	3,625	3,708	2,850	2,458	2,401	3,088	↑ 28.6%	↑ 8.3%	↑ 39.5%
Long eggplants	KG	2,450	3,292	3,633	3,417	2,800	3,417	3,708	4,722	↑ 27.3%	↑ 68.7%	↑ 34.5%
Round eggplants	KG	2,150	3,792	2,917	3,625	2,450	3,500	4,005	4,639	↑ 15.8%	↑ 89.3%	↑ 80.4%
Tomatoes	KG	3,464	3,800	4,033	4,542	3,950	4,417	5,431	6,017	↑ 10.8%	↑ 52.3%	↑ 29.9%
Spong gourd	KG	2,643	2,900	3,167	3,625	3,000	2,792	3,302	3,264	→ -1.2%	↑ 8.8%	↑ 18.7%

\* Food items for calculate the monthly per capita cost of a basic food basket

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Food commodity	Unit	Apr'25	May'25	Jun'25	Jul'25	Aug'25	Sep'25	Oct'25	Nov'25	Change compared to Oct 2025	Change compared to Aug 2025	Change compared to Nov 2024
Ridge Gourd	KG	2,880	3,000	3,167	3,125	3,000	2,750	3,075	2,750	↓ -10.6%	↓ -8.3%	→ 0.0%
Green papaya	KG	1,500	1,600	1,463	1,192	1,120	1,317	1,225	1,403	↑ 14.5%	↑ 25.2%	↓ -7.1%
Long bean	KG	3,607	4,800	6,733	4,542	4,150	3,292	3,667	5,167	↑ 40.9%	↑ 24.5%	↑ 18.6%
Banana flower	KG	2,583	3,313	2,436	2,625	2,350	2,750	2,564	2,924	↑ 14.0%	↑ 24.4%	↑ 32.4%
Cauliflower	KG	5,000	5,500	6,800	5,833	6,250	8,050	7,599	8,472	↑ 11.5%	↑ 35.6%	↑ 11.9%
Chinese Kale	KG	4,393	5,938	7,300	5,042	4,850	6,500	7,146	7,530	↑ 5.4%	↑ 55.3%	↑ 24.0%
<b>Orange-flesh Sweet Potatoes*</b>	<b>KG</b>	<b>2,600</b>	<b>2,438</b>	<b>2,208</b>	<b>1,750</b>	<b>1,750</b>	<b>2,500</b>	<b>2,633</b>	<b>2,650</b>	<b>→ 0.6%</b>	<b>↑ 51.4%</b>	<b>↑ 13.6%</b>
Garlic	KG	8,600	7,857	7,010	6,781	6,639	6,350	6,784	6,767	→ -0.3%	→ 1.9%	↓ -14.5%
Ripe tamarind (with seed)	KG	6,750	5,875	5,542	5,700	5,938	5,900	6,109	6,037	→ -1.2%	→ 1.7%	→ -4.7%
Ripe tamarind (No seed)	KG	-	-	-	-	-	-	5,667		•	•	•
Water lily	KG	1,700	2,520	2,500	2,500	2,100	1,700	2,712	3,750	↑ 38.3%	↑ 78.6%	↑ 66.7%
Climbing wattle	KG	6,500	5,600	6,875	6,000	6,167	6,500	9,115	11,429	↑ 25.4%	↑ 85.3%	↑ 24.7%
Lufa Gourd leaf	KG	-	3,500	-	-	-	-	5,833		•	•	•
Agati	KG	-	3,500	-	-	-	5,000	6,500		•	•	•
Abalone mushroom	KG	9,000	8,000	7,833	6,950	7,750	8,875	8,755	8,083	↓ -7.7%	→ 4.3%	↓ -14.9%
Cabbage	KG	3,125	2,550	2,646	2,680	2,938	2,900	3,382	3,722	↑ 10.0%	↑ 26.7%	→ 1.5%
Chinese salad	KG	3,667	3,450	4,750	4,200	3,938	4,300	4,297	4,111	→ -4.3%	→ 4.4%	↓ -7.5%
Bean sprout	KG	3,500	3,300	3,500	3,063	3,150	2,583	2,792	2,750	→ -1.5%	↓ -12.7%	↓ -23.8%
Baby watermelon	KG	-	3,000	-	-	-	-	2,458	2,500	→ 1.7%	•	↑ 25.0%
Okra	KG	8,500	5,550	6,722	6,500	6,167	5,400	6,528	5,786	↓ -11.4%	↓ -6.2%	↑ 5.2%
Baby corn	KG	6,500	9,000	9,667	8,000	10,000	7,083	3,913		•	•	•
Corn	KG	-	-	-	-	-	-	3,500		•	•	•
Palm fruit (sliced)	KG	5,000	7,000	10,000	-	10,000	10,000	6,750	7,667	↑ 13.6%	↓ -23.3%	↓ -23.3%
Cucumber	KG	3,188	3,250	3,813	2,500	2,063	3,438	3,733	2,086	↓ -44.1%	→ 1.1%	↓ -30.5%
Taro	KG	6,500	5,850	5,125	5,500	5,333	4,250	5,030	4,850	→ -3.6%	↓ -9.1%	↓ -27.7%
Chinese radish	KG	2,750	2,800	3,250	3,000	3,167	2,500	3,910	3,528	↓ -9.8%	↑ 11.4%	↑ 32.3%
Bamboo shoot	KG	5,000	3,350	2,500	1,500	2,000	1,833	2,979	3,167	↑ 6.3%	↑ 58.3%	↓ -20.8%
Ripe Banana	KG	2,375	2,500	2,179	2,063	2,450	2,500	2,109	2,017	→ -4.4%	↓ -17.7%	↓ -18.0%
Ripe Mango	KG	1,625	1,500	-	-	-	-	-	-	•	•	•
Pineapple/Anana	KG	2,750	3,125	2,750	2,563	2,375	2,500	2,731	2,375	↓ -13.0%	→ 0.0%	↓ -23.0%
Fresh milk	140 ml	1,617	1,567	1,467	2,000	2,167	-	2,000	1,967	→ -1.7%	↓ -9.2%	↑ 13.5%
Coke	330 ml	-	1,860	1,850	2,000	2,000	-	1,894	1,775	↓ -6.3%	↓ -11.3%	→ 1.4%
Gasoline (Regular)	L	3,817	3,660	3,580	3,940	3,780	3,783	3,801	3,750	→ -1.4%	→ -0.8%	→ -2.0%
Diesel	L	3,467	3,450	3,270	3,513	3,380	3,340	3,494	3,389	→ -3.0%	→ 0.3%	→ -1.8%
Fertilizer: Urea	KG	2,840	2,842	2,667	2,938	2,875	2,793	2,795	2,735	→ -2.1%	→ -4.9%	↑ 5.2%

\* Food items for calculate the monthly per capita cost of a basic food basket

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