



The Southeast Asia Aid Map is a comprehensive database tracking official development finance (ODF) flows across Southeast Asia. Launched by the Lowy Institute in 2023 and updated annually, the project is supported by the Australian Department of Foreign Affairs and Trade. By promoting greater transparency of ODF flows, the Lowy Institute seeks to increase coordination, improve accountability, and strengthen decision-making and policy debate on aid, development, and geoeconomic competition in the region.

This third edition of the Southeast Asia Aid Map encompasses the period from 2015 to 2023. It includes data on more than 130,000 projects carried out by 109 development partners, totalling \$290 billion. The research covers all 11 Southeast Asian nations: Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, the Philippines, Singapore, Thailand, Timor-Leste, and Vietnam.

The Map synthesises millions of data points from official reporting mechanisms and databases. It combines this with information from thousands of publicly available documents including annual reports, financial statements, budget documents, news media reporting, and social media sources. The resulting database is the most comprehensive account ever assembled of development projects in Southeast Asia.

This 2025 Key Findings Report includes an analysis of Southeast Asia's evolving development finance landscape and a series of profiles on each of the 11 Southeast Asian countries covered in the database.

Key findings in 2025

- Regional development support increased modestly in 2023 but remained below pre-Covid levels.
- US, EU, and UK aid cuts could see official development finance to the region decline by more than \$2 billion in coming years.
- Western aid cuts and rising trade tensions will reduce Southeast Asia's development choices and risk ceding ground to China.
- Aid cuts will also deepen a development divide, with poorer countries and social sector priorities falling behind.
- Southeast Asia's infrastructure race has slowed to a crawl.
- The region's energy transition is dangerously underfunded, with global implications.
- Progress on climate and social inclusion may come under pressure.

To see more and use the fully interactive features of the Southeast Asia Aid Map, visit seamap.lowyinstitute.org

CAMBODIA

\$22 billion	SPENT
\$33 billion	COMMITTED
17,496	PROJECTS
73	DEVELOPMENT PARTNERS

Cambodia is a lower-middle income economy according to the World Bank and a UN-designated Least Developed Country.

In 2023, Cambodia received \$2.5 billion in official development finance. China, Japan and the Asian Development Bank have been Cambodia's primary development partners, together accounting for almost 60% of Cambodia's ODF since 2015.

A dramatic collapse in China's spending in Cambodia in 2022 has been partially corrected by ongoing disbursements for large infrastructure projects, but 2023 levels were still lower than China's average yearly spend between 2015 and 2022.

The Transport & Storage sector has consistently received the most support from Cambodia's development partners. Since 2015, Transport & Storage has received roughly a third of all ODF to Cambodia.

13% of ODF to Cambodia since 2015 has been spent in the Government & Civil Society sector but this amount remains below regional averages.

Despite Cambodia's energy generation and access challenges, ODF spending on energy at 6% is far lower than the regional average of 21% and it ranks as only the seventh-largest sector.

Over 2015-2023, Cambodia received less than the regional average for ODF integrating disability inclusion (6%) and climate action (28%) goals as a share of ODF. However, it received slightly more than the regional average for ODF targeting gender equality (27%).

Cambodia is the third-largest provider of intra-regional ODF, providing an annual average of \$900,000 over 2015-2023, exclusively to its neighbours Laos, Vietnam and Myanmar.

