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Livelihoods and Food Security Fund

MONTHLY FOOD PRICE REPORT

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Myanmar Monthly Food Price Report – June 2026

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KEY HIGHLIGHTS

- Rice prices rose modestly in June 2026, up 5.2 percent year-on-year and 1.8 percent month-on-month. While national price movements were limited, substantial regional price disparities persisted, reflecting differences in production conditions, market access, and transport costs.
- Most export crop prices showed limited month-on-month movements. Pulses prices remained broadly stable, while maize prices increased modestly, supported by continued export demand. In contrast, green gram prices declined as concerns over pesticide residues and grain quality reportedly led some Chinese buyers to reject shipments.
- Vegetable prices showed mixed trends. Onion and chili prices increased, supported by stronger export demand, while garlic and potato prices declined as increased market supplies, including higher inflows of Chinese garlic and potatoes, placed downward pressure on prices.
- Most animal-sourced food prices remained substantially above year-earlier levels, led by mutton, fish, and beef. Month-on-month price movements were generally modest, although mutton prices remained at record highs due to constrained goat supply, while fish prices continued to be supported by seasonal fishing restrictions through the end of June.
- The conflict in Iran and partial closure of the Strait of Hormuz — through which more than a quarter of the world's oil and 20–30 percent of global fertilizer exports transit — continue to keep fuel and fertilizer prices in Myanmar well above year-earlier levels. Some farmers report cultivating smaller areas or reducing plowing in response. With paddy prices largely flat, thinner margins are likely to translate into lower fertilizer application rates and, ultimately, reduced monsoon-season production.
- Flood warnings have been issued in recent weeks for parts of the country. Moreover, a new El Niño phase is expected to develop within the coming weeks, increasing the risks of drought in the country.

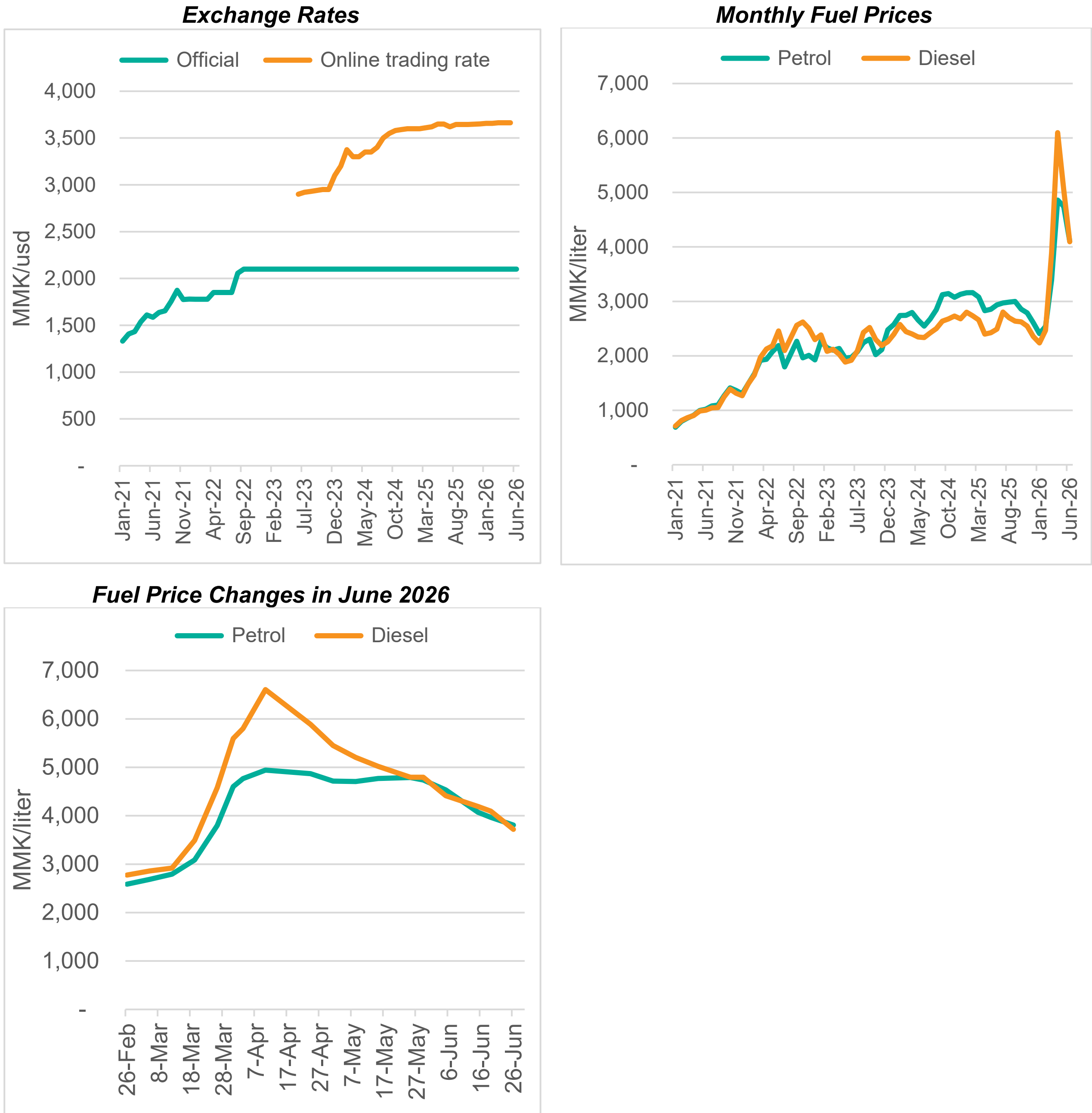
Introduction

The rapidly evolving agricultural and food security situation in Myanmar requires a high frequency, systematic, and comprehensive approach to monitoring. The Myanmar Monthly Food Price Report synthesizes food price trends using publicly available datasets, focusing on key agricultural crops and highlighting regional differences in rice prices. By analyzing these trends, the report aims to provide insights into the broader agricultural market and the factors driving food price fluctuations in Myanmar.

Two primary factors influencing food price trends in the country are exchange rates and fuel prices. In June 2026, the official exchange rate remained unchanged at 2,100 MMK/USD – at the same level for three years (Figure 1). The online trading exchange rate increased marginally by 0.4 percent compared to June 2025, indicating relatively stable foreign exchange market conditions. As in previous months, export earnings remained subject to the requirement that 15 percent be exchanged at the official rate and the remaining 85 percent at the online trading rate.

Fuel prices remain substantially elevated following trade disruptions linked to the partial closure of the Strait of Hormuz. At the end of June 2026, diesel prices were 34 percent higher and petrol prices 47 percent higher than prior to the start of the conflict. Relative to the same month in 2025, diesel prices in June 2026 increased by 64 percent while petrol prices increased by 40 percent (Figure 1). Moreover, fuel is becoming increasingly scarce across the country, with even sharper price increases in remote and conflict-affected areas. However, fuel availability improved, and prices decreased in June compared to May.

Figure 1. Exchange Rate and Fuel Price Developments



Source: Central Bank Myanmar (exchange rate) and Department of Consumer Affairs (fuel price)

Food Price Developments

Rice

Table 1 shows that national average rice prices increased modestly by 1.8 percent month-on-month and 5.2 percent year-on-year in June 2026, indicating generally stable rice market conditions. A comparison of rice prices across different regions and states reveals the following:

• Month-on-month price movements were generally limited across most regions and states. The largest increases were observed in Kayin (10.0 percent), Mandalay (9.4 percent), Bago (6.7 percent), Ayeyarwady (3.2 percent), and Tanintharyi (2.7 percent), while prices remained unchanged in most other regions and states, suggesting stable market conditions across much of the country.

• Year-on-year price trends were mixed across regions and states. Significant increases were recorded in Kachin (25.0 percent), Tanintharyi (15.1 percent), Ayeyarwady (8.3 percent), Sagaing (8.1 percent), Mon (6.7

percent), and Bago (6.7 percent). In contrast, prices remained below last year's levels in Shan (East), Shan (South), and Nay Pyi Taw, reflecting continued regional differences in market conditions and supply availability.

• Regional price gaps remained pronounced. Shan (North and East), Kachin, Kayah, Sagaing, and Magway recorded prices above the national average, while major rice-producing regions such as Ayeyarwady, Bago, Mandalay, Yangon, Mon, Shan (South), and Nay Pyi Taw remained below the national average. The highest prices were observed in Shan (North), at around 36 percent above the national average. In contrast, prices in Shan (South) were 16 percent below the national average, while those in Mon, Bago, and Nay Pyi Taw were 13 percent below the national average, reflecting continued differences in production conditions, market access, and transport costs.

Table 1. Regional Urban Retail Rice Prices (MMK/KG) Emata

	Comparison over Time (nominal prices)					Comparison of States/Regions (relative to national average)		
State/Region	Jun-26 **Current**	Jun-25 **Last Year**		May-26 **Last Month**		Jun-26 **Current**	Jun-25 **Last Year**	May-26 **Last Month**
Kachin	1,880	1,504	25.0%	1,880	0.0%	1.09	0.92	1.11
Shan (North)	2,350			2,350	0.0%	1.36		1.39
Shan (East)	1,997	2,444	-18.3%	1,997	0.0%	1.16	1.49	1.18
Shan (South)	1,457	1,551	-6.1%	1,457	0.0%	0.84	0.94	0.86
Kayah	1,880	1,880	0.0%	1,880	0.0%	1.09	1.15	1.11
Kayin	1,551	1,504	3.1%	1,410	10.0%	0.90	0.92	0.83
Mon	1,504	1,410	6.7%	1,504	0.0%	0.87	0.86	0.89
Tanintharyi	1,786	1,551	15.1%	1,739	2.7%	1.03	0.94	1.03
Yangon	1,551	1,504	3.1%	1,551	0.0%	0.90	0.92	0.91
Ayeyarwady	1,527	1,410	8.3%	1,480	3.2%	0.88	0.86	0.87
Sagaing	1,880	1,739	8.1%	1,880	0.0%	1.09	1.06	1.11
Mandalay	1,645	1,645	0.0%	1,504	9.4%	0.95	1.00	0.89
Magway	1,880	1,880	0.0%	1,880	0.0%	1.09	1.15	1.11
Bago	1,504	1,410	6.7%	1,410	6.7%	0.87	0.86	0.83
Nay Pyi Taw	1,504	1,551	-3.0%	1,504	0.0%	0.87	0.94	0.89
National Avg.	1,726	1,642	5.2%	1,695	1.8%	1.00	1.00	1.00

Source: Department of Consumer Affairs

Other Crops

Most export crop prices showed relatively limited movements in June 2026. Pulses prices remained broadly stable month-on-month, with a small increase in black gram (1.4 percent), no change in pigeon pea prices, and slight declines in green gram (1.0 percent) and chickpea (0.5 percent). Despite limited month-on-month movements, year-on-year prices remained higher across most pulses, except for green gram, which declined by 7.2 percent. Green gram prices were reportedly affected by heavy rainfall that increased storage pest risks, leading to greater pesticide use. Concerns over pesticide residues and grain quality reportedly led some Chinese buyers to reject shipments, contributing to the price decline. Maize prices increased marginally by 0.8 percent month-on-month but remained substantially higher (15.9 percent) than a year earlier. The extension of Thailand's zero-tariff maize import period until the end of August likely continued to support export demand, though upward price pressure moderated as prices settled from recent record highs.

Onion prices increased by 15.6 percent month-on-month and 27.5 percent year-on-year. The recent resumption of Myawaddy border trade supported onion exports, contributing to higher domestic prices than are typical for this time of year, when seasonal price declines are usually observed. Garlic prices declined by 4.8 percent month-on-month. Reports indicate that unusually high inflows of Chinese garlic during this period increased market supply, contributing to lower prices for domestically produced garlic. Potato prices continued to decline, falling by 8.1 percent month-on-month, amid increased market supplies and weak demand. Higher arrivals at wholesale markets and storage facilities made it difficult for wholesalers to absorb the additional volumes, contributing to further price declines and increasing financial pressure on potato farmers. Chili prices increased by 13.8 percent month-on-month and 41.6 percent year-on-year, supported by stronger domestic and export demand, particularly from Thailand, China, and India.

Table 2. Average Wholesale Prices in Myanmar (MMK/KG)

Commodity	Jun-26 Current	Jun-25 Last Year			May-26 Last Month		
Export Crops							
- Maize	1,086	937	↑	15.9%	1,077	↑	0.8%
- Green Gram	3,283	3,537	↓	-7.2%	3,316	↓	-1.0%
- Black Gram	3,184	2,930	↑	8.7%	3,140	↑	1.4%
- Chickpea	2,598	2,383	↑	9.0%	2,612	↓	-0.5%
- Pigeon Pea	3,131	2,912	↑	7.5%	3,131	→	0.0%
Local Crops							
- Onion	2,364	1,854	↑	27.5%	2,045	↑	15.6%
- Garlic	7,961	7,897	↑	0.8%	8,359	↓	-4.8%
- Chili	12,925	9,127	↑	41.6%	11,357	↑	13.8%
- Potato	2,937	2,968	↓	-1.1%	3,197	↓	-8.1%

Source: Myantrade and DoA - MIS

Animal-Sourced Food

Most animal-sourced foods continued to record notable year-on-year price increases in June 2026 (Table 3), while month-on-month movements were mixed. Pig producers continued to face financial pressure as feed costs increased while live pig prices declined, partly due to increased imports of pigs from Thailand. Despite these developments in production, retail pork prices showed little movement, declining by only 0.6 percent month-on-month. Goat supply remained constrained as local conditions in major production areas reportedly led many producers to exit the sector, resulting in a continued supply demand imbalance. Consequently, mutton prices increased by 5.8 percent month-on-month and 74.5 percent year-on-year, remaining at record highs. Demand for draught cattle remained supported as higher fuel prices reportedly encouraged some farmers to purchase cattle for land preparation instead of relying on hired tractors. Retail beef prices rose more modestly than live cattle prices, by 1.8 percent month-on-month and 17.0 percent year-on-year. Fish prices remained well above year-earlier levels, with Carp and Rohu prices increasing by 22.0 percent and 29.3 percent year-on-year, respectively. Month-on-month price movements remained modest, with Carp prices unchanged and Rohu prices increasing by 2.3 percent. Seasonal fishing restrictions from April to June may have continued to support prices toward the end of the ban period.

Table 3. Average Retail Prices in Myanmar (MMK/KG)

Commodity	Jun-26 Current	Jun-25 Last Year			May-26 Last Month		
- Eggs (piece)	475	421	↑	12.8%	460	↑	3.3%
Meat							
- Chicken	13,095	11,764	↑	11.3%	12,942	↑	1.2%
- Beef	18,936	16,164	↑	17.1%	18,601	↑	1.8%
- Pork	20,042	19,312	↑	3.8%	20,161	↓	-0.6%
- Mutton	33,705	19,315	↑	74.5%	31,845	↑	5.8%
Fish							
- Carp	16,667	13,661	↑	22.0%	16,667	→	0.0%
- Rohu	11,497	8,889	↑	29.3%	11,241	↑	2.3%

Source: Department of Consumer Affairs

Looking Forward

Key developments to monitor in upcoming months include:

- **Implications of the conflict in Iran:** The conflict in Iran has led to a partial closure of the Strait of Hormuz, through which more than a quarter of the world's oil exports and an estimated 20–30 percent of global fertilizer exports transit. This disruption is expected to have significant implications for the global agrifood system, as fuel prices have risen sharply and fertilizer prices have also increased substantially. These developments are particularly concerning for Myanmar's agrifood system, which depends heavily on fuel for transportation, irrigation, mechanization, and processing. Some farmers already report cultivating smaller areas or reducing the number of plowings because of higher fuel costs. In addition, disruptions to fertilizer supply could adversely affect agricultural production during the current monsoon season. Fertilizer prices are expected to remain substantially above last year's levels. In May 2026, the reference price for a bag of urea fertilizer was set at 157,000 MMK before being reduced to 140,000 MMK in June and further lowered to 120,000 MMK at the end of the month. Despite these reductions, the reference price remains well above the 94,000 MMK per bag recorded during the previous monsoon season, representing an increase of about 28 percent. As crop output prices have changed relatively little over the same period, the profitability of fertilizer use has declined, likely leading to lower application rates and, consequently, significant reductions in agricultural production.
- **International rice price developments**: International rice prices increased modestly in June 2026, as the FAO All Rice Price Index rose by 3.2 percent month-on-month and was 2.6 percent higher than in the corresponding period last year. Given the strong integration of Myanmar's rice markets with global markets, these trends may continue to influence agricultural incentives, particularly in light of rising costs of key agricultural inputs such as mechanization services and fertilizer.
- **Maize export market outlook:** Prospects for Myanmar maize exports remain favorable. Thailand has extended its duty-free import window, while the Philippines has proposed more than doubling its maize import quota to 500,000 metric tons, which could strengthen regional demand for imported maize. In addition, Chinese buyers have expressed interest in expanding imports of Myanmar maize. Developments in regional maize demand and their implications for Myanmar export opportunities and domestic maize prices will be important to monitor in the coming months.
- **Thailand-Myanmar border trade:** Thailand's Department of Foreign Trade has highlighted Myanmar import licensing requirements and Export Earning Matching system as key factors that may continue to influence purchasing power and bilateral trade flows in the second half of 2026. The implications for agricultural trade and border market activity will be important to monitor in the coming months.
- **Government policy measures:** Temporary tax exemptions on imports of diesel, fertilizer, and liquefied natural gas have been extended through July 2026. The continuation of these measures may help moderate transport and agricultural input costs, although their implications for food prices will depend on broader market conditions.
- **Monsoon flood risks and preparedness:** Flood warnings have been issued for parts of the Ayeyarwady Delta, Bago, Sittaung River Basin, and Yangon areas due to the combination of heavy rainfall, elevated river flows, and high tides. Potential flooding in low-lying areas may affect crop production, livestock activities, transport networks, and market access. The Department of Fisheries has also advised fish farmers to take preventive measures against pond flooding and fish losses. Developments in flood conditions and their implications for agricultural production and food supply chains will be important to monitor in the coming months. Moreover, a new El Niño phase is expected to develop within the coming weeks, increasing the risks of drought across much of Southeast Asia.

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