



Monitoring the Agri-food System in Myanmar

The rising costs of diets – September 2024 survey round

We assess changes in food prices and diet costs based on large-scale surveys of food vendors (fielded from June 2020 until September 2024) and households (fielded in six periods between 2022 to 2024) across rural and urban areas and in all states/regions of Myanmar.

Key Findings

- Between July 2023 and September 2024, the cost of a healthy and commonly consumed diet increased by 34 and 35 percent, respectively.
- The price of rice – the major staple – was more than twice as high in September 2024 compared to two years prior. Prices rose by 29 percent between July 2023 and September 2024, and by only 7 percent between March and September 2024.
- In September 2024, cooking oil prices were 88 percent higher than the previous year, but 15 percent lower than two years prior.
- In September 2024, the median prices of most protein-rich foods, except for fish, were at least 50 percent higher compared to two years prior. Over the same two-year period, banana prices doubled.
- The highest costs for both common and healthy diets are seen in the conflict-affected states of Rakhine and Kachin, where in September 2024, the costs of the healthy diet was about 65 percent higher than the national average and the costs of the common diet costs was about 40 percent higher.
- Compared to average casual wages, the healthy and common diets are least affordable in Kachin, Rakhine and Magway and most affordable in Kayin and Mon.
- Between the fourth quarter of 2023 and September 2024, the prices of petrol rose by 90 percent, bar soap and paracetamol by nearly 50 percent, and toothpaste by 160 percent.

Recommended Actions

- Ensuring food is available at affordable prices is crucial to prevent food security and nutrition issues in the country. Therefore, prioritizing a well-functioning agri-food system should be a key focus for all stakeholders.
- The food price situation in Rakhine State is most concerning among all states and regions, and the state should be prioritized – to the extent that this possible – for assistance.

Introduction

This research note presents the results of 28 rounds of interviews with food vendors in rural and urban areas throughout Myanmar conducted between June 2020 and September 2024. The purpose of the surveys is to provide data and insights on Myanmar's food markets to interested stakeholders to foster better understanding of the effects of shocks related to COVID-19 and the ongoing political crisis. The focus of this research note is on changes in food prices and the cost of common and healthy diets using data from September 2024 (August 30–September 16) in comparison to data from one and two years prior.

Data

MAPSA collects food prices in Myanmar through three ongoing phone surveys. The first, the COVID-19 food vendor survey (C19-FV) is MAPSA's longest running food vendor survey in Myanmar, with fifteen rounds completed between June 2020 and August 2023.¹ Second, the Myanmar Household Welfare Survey (MHWS) is a large panel survey conducted by phone, with a minimum 12,000 households per round. To date, seven rounds have been completed, covering the period from December 2021 to June 2024.² MHWS respondents who report operating household businesses that sell food (such as mobile or fixed food vendors, food traders, brokers, or wholesalers) are selected to participate in a food vendor module. Finally, for more frequent and detailed food price monitoring, IFPRI conducts an additional survey of MHWS food vendors between MHWS survey rounds (MHWS-FV), with six rounds completed between March 2022 and September 2024. None of the food vendor surveys are nationally representative and the C19-FV has a greater focus on rural areas compared to the MHWS and the MHWS-FV.³

In all surveys, vendors report prices for the cheapest common or available variety of ten types of foods (basic food list): rice, potatoes, pulses, chicken, fresh fish, dried fish, green leafy vegetables, onions, bananas, and oils.⁴ Additionally, the C19-FV and MHWS-FV surveys include pork prices in all rounds; egg, tomato, salt, and sugar prices starting in 2022; and, garlic, ngapi, and dried chili prices starting in July 2023. In this report, the expanded food list refers to the basic food list plus eggs, pork, and tomatoes. Unless otherwise noted, diet costs are estimated using the expanded food list. Beginning in September 2024, food vendors also report prices for petrol and various health and personal hygiene items.

Food prices between June 2020 and September 2024

Table 1 presents changes in median food prices. Median rice prices continue to increase, posing a significant threat to food security. Although rice inflation has slowed in recent months, prices increased by 275 percent between June 2020 and September 2024. **In September 2024, median rice prices had doubled compared to two years prior, with a 29 percent increase between July 2023 and September 2024. Between March and September 2024, rice prices increased by only seven percent,** a deceleration seemingly linked to international rice markets, as FAO's rice price index declined during this period.⁵

¹ For more information on the C19-FV refer to the following reference: Minten, Bart; Oo, Than Zaw; Headey, Derek D.; Lambrecht, Isabel; and Goudet, Sophie. 2020. Monitoring the impacts of COVID-19 in Myanmar: Food vendors - June and July 2020 survey round. Myanmar SSP Policy Note 30. Washington, DC: International Food Policy Research Institute (IFPRI). <https://doi.org/10.2499/p15738coll2.134015>

² For more information on the MHWS refer to the following reference: Myanmar Agriculture Policy Support Activity (MAPSA). 2022. Phone surveillance, from scratch: Novel sample design features of the nationally representative Myanmar Household Welfare Survey (MHWS). Myanmar SSP Working Paper 16. Washington, DC: International Food Policy Research Institute (IFPRI). <https://doi.org/10.2499/p15738coll2.135837>

³ The most recent survey rounds have sample sizes of 160 in the C19_FV, 607 in the round 7 MHWS, and 706 in round 6 MHWS-FV. Eighty-four percent of C19-FV vendors are located in rural areas compared to 59 and 64 percent in the MHWS and MHWS-FV. Furthermore, the C19-FV sample only includes vendors who sell from a fixed location, whereas about 18 and 28 percent of MHWS and MHWS-FV respondents are mobile vendors.

⁴ In the MHWS-FV survey and beginning in 2022 for the C19-FV survey, vendors are asked to report up to 5 common varieties of rice and 6 pulses. For this analysis, we use the price of the cheapest variety reported.

⁵ FAO Rice Price Update, November 2024. <https://www.fao.org/markets-and-trade/commodities/rice/fao-rice-price-update/en>

Median cooking oil prices increased by nearly 600 percent between June 2020 and September 2024. **In September 2024, median cooking oil prices were 88 percent higher than the previous year, although 15 percent lower than two years prior.** Most of the recent increase occurred in the third quarter of 2024, as oil prices more than doubled between March and September 2024. The surge in cooking oil prices corresponds with tighter import controls, which led to palm oil rationing.

In September 2024, median prices for most protein-rich foods, except for fish, were at least 50 percent higher than two years prior. Over the same two-year period, banana prices doubled, while vegetable prices saw little change or even declined.

Table 1: Percentage changes in median food prices, June 2020–September 2024

	Past half year Mar 24– Sep 24	Previous half year Jul 23– Mar 24	Past year Jul 23– Sep 24	Previous year Sep 22– Jul 23	Past 2 years Sep 22– Sep 24	Survey period Jun 20– Sep 24
Rice	7	20	29	59	105	275
Potatoes	29	9	41	7	50	350
Oil	113	-12	88	-15	60	596
Pulses	25	17	46	23	80	152
Eggs	55	-14	33	26	68	0
Chicken	11	13	25	20	50	114
Pork	18	-6	11	38	54	150
Fresh Fish	0	0	0	33	33	60
Dried Fish	7	15	23	0	23	100
Leafy Greens	0	33	33	-17	10	121
Onions	0	11	11	-32	-25	275
Tomatoes	150	-60	0	-17	-17	0
Bananas	67	0	67	25	108	213
Salt	25	-11	11	29	43	
Sugar	30	25	62	33	117	
Ngapi*	17	20	40	43	100	
Dried Chili*	-20	-12	-29	70	20	
Garlic*	7	75	87	78	233	

Source: C19-FV (Round 1–15) and MHWS-FV (Round 1–6) phone surveys.

Note: Collection of ngapi, dried chili, and garlic prices began in July 2023. Collection of egg, tomato, salt, and sugar prices began in February 2022. Changes over a half year period or the full survey period include the influence of seasonality on prices.

Costs of healthy and common diet food baskets

Prices of individual foods fluctuate differently over time and space. Moreover, foods are consumed in varying quantities, giving individual items different levels of importance in overall diet costs. As a result, changes in the prices of specific foods do not provide a clear picture of how household diet costs are evolving. Analyzing a fixed food basket offers a way to understand the impact of food prices on diet costs. In this section, we compare the costs of two food baskets to better assess the changing expenses faced by households with typical consumption patterns (common diet basket) and the costs of obtaining a balanced and healthy diet (healthy diet basket).

The healthy diet basket contains a higher proportion of nutrient-dense fruits, vegetables, and protein-rich foods (such as eggs, chicken, pork, fish, and pulses), which provide a larger share of dietary energy compared to the common diet basket. Consequently, these items have a greater impact on the cost of a healthy diet compared to a common diet (Figure 1).^{6 7}

Figure 1: Healthy and common diet food baskets by food group, calories

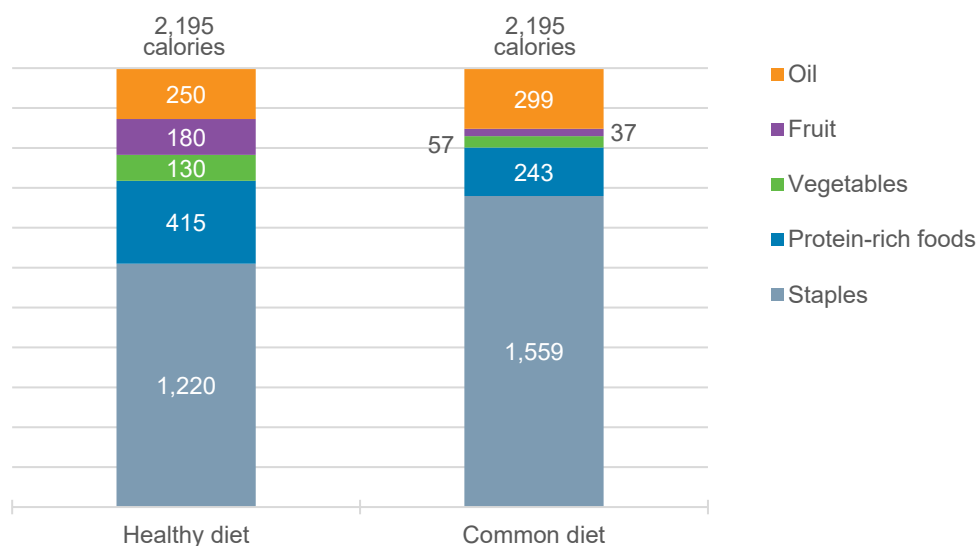


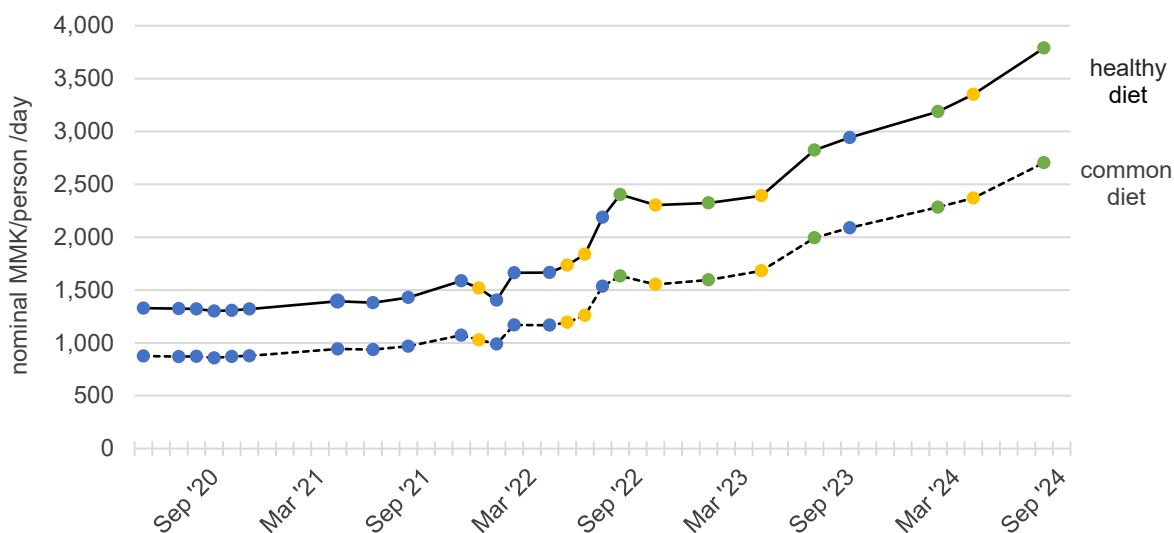
Figure 2 and Table 2 present the dietary costs of both the common and healthy diets. For consistency over time, diet costs shown in Figure 2 are limited to the basic food list. Over the full survey period (June 2020–September 2024), the cost of the healthy diet rose by 187 percent, while the common diet increased by 210 percent. Considering the full basket, **between July 2023 and September 2024, the costs of the healthy and common diets rose by 34 and 35 percent, reaching 3,948 MMK and 2,777 MMK per person per day, respectively** (Table 2). Healthy diet costs rose by 6 percent in the first half of this period compared to 28 percent in the latter half, while common diet costs rose by 9 percent in the first half and 25 percent in the latter half. Over the two-year period prior to September 2024, diet costs increased by more than 50 percent, with the healthy diet up by 56 percent and the common diet by 64 percent. The cost of both diets rose by an additional 2 percentage points in rural areas compared to urban areas. Although the percentage difference between the two diets narrowed over the survey periods, the cost of the healthy diet remained

⁶ We evaluate the cost of these two stylized diets using the limited items in the surveys with the aim of tracking changes in diet costs, rather than providing a nuanced estimate of costs faced by households of varying compositions.

⁷ The common diet basket is based on average regional food group consumption reported by households surveyed in the 2015 Myanmar Poverty and Living Conditions Survey (MPLCS). The healthy diet methodology is based on work by Herforth and co-authors (Herforth, A., Y. Bai, A. Venkat, K. Mahr, A. Ebel, and W.A. Masters. 2020. Cost and affordability of healthy diets across and within countries. Background paper for the State of Food Security and Nutrition in the World 2020. Rome: FAO.) Healthy diet guidelines used to define the healthy diet are adapted for an adult woman from the Myanmar food based dietary guidelines for pregnant and lactating women applied to the foods in the vendor surveys in proportions reported in the 2015 MPLCS (Zaw, H.M.M., C.M Thar, and W.T.K. Lee. 2022. Myanmar food-based dietary guidelines for pregnant and lactating women. Nay Pi Taw, Myanmar: FAO). For more a more detailed description of the methodology used in this report, refer to Myanmar Agriculture Policy Support Activity. 2024. Monitoring the Agri-food System in Myanmar: The rising costs of diets – March 2024 survey round. Myanmar SSP Research Note 107. Washington, DC: International Food Policy Research Institute. <https://hdl.handle.net/10568/141639>

significantly higher than the common diet—50 percent higher in September 2022 (2,530 MMK versus 1,783 MMK) compared to 42 percent higher in September 2024 (3,948 MMK versus 2,777 MMK).

Figure 2: National trends in the cost of healthy and common diets, June 2020–September 2024



Source: C19-FV (Round 1–15), MHWS-FV (Round 1–6), MHWS (Round 1–7) phone surveys.
 Note: For consistency over time this figure excludes eggs, pork, and chicken.

Table 2: National trends in the cost of healthy and common diets, March 2022 to September 2024

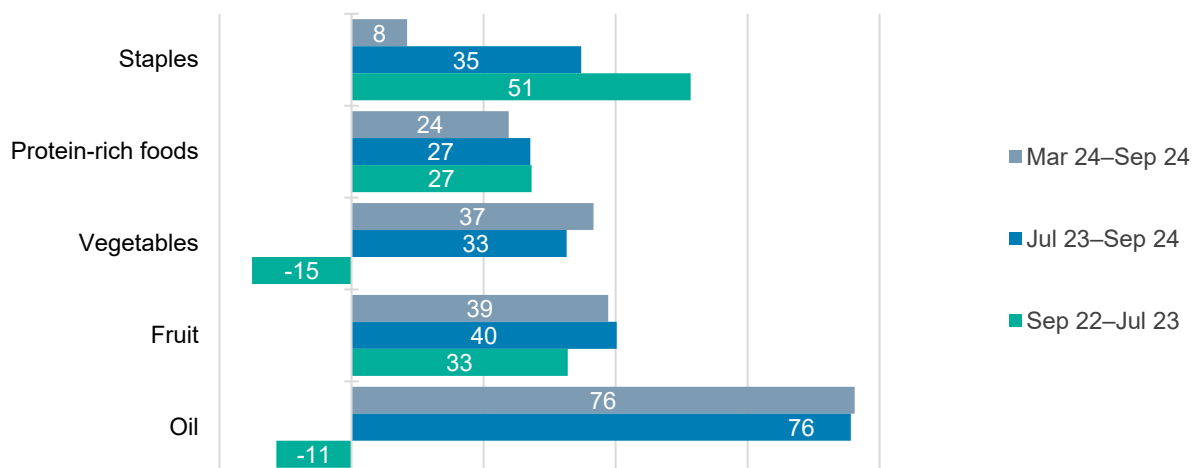
	Healthy diet			Common diet		
	Overall	Urban	Rural	Overall	Urban	Rural
March 2022	1,666	1,840	1,595	1,166	1,285	1,118
September 2022	2,530	2,678	2,469	1,691	1,783	1,654
February 2023	2,420	2,525	2,377	1,638	1,708	1,610
July 2023	2,949	3,162	2,862	2,050	2,181	1,997
March 2024	3,116	3,279	3,051	2,240	2,363	2,190
September 2024	3,948	4,139	3,866	2,777	2,906	2,722

Source: MHWS-FV (Round 1–6)

Due to their different compositions (Figure 3), changes in food group costs affect the two diets differently. Rice and oils have a relatively larger impact on the cost of the common diet, while protein-rich foods, vegetables, and fruits have a greater influence on the healthy diet. The larger increase in the cost of the common diet over time is primarily due to the significant impact of price rises in staple foods, particularly rice, which is consumed in larger quantities in the common diet than in the more diversified healthy diet.

Between September 2022 and July 2023 (teal bar in Figure 3), the cost of the staple food group increased by 51 percent—more than any other food group. However, **between March and September 2024 (grey bar in Figure 3) staples increased by 9 percent—less than any other food group—and between July 2023 and September 2024 (blue bar in Figure 3) staples increased by 35—less than all food groups except protein-rich foods.** Figure 4 shows how these relative differences in changing food group costs together with diet composition influence how each food group contributes to rising diet costs.

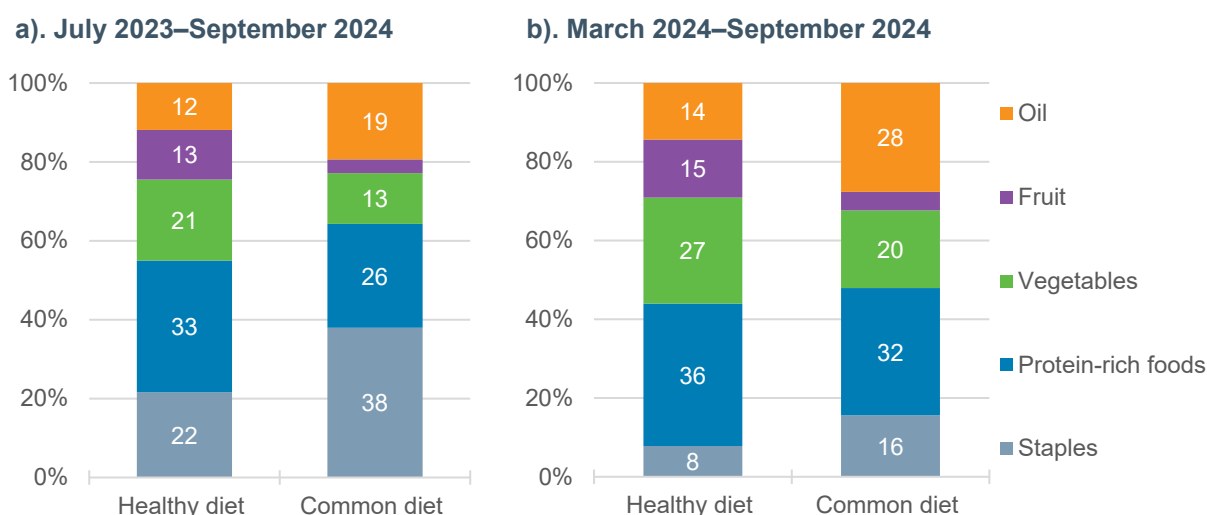
Figure 3: Changes in food group costs (percent), September 2022 to September 2024



Source: MHWS-FV (Round 1–6).

Between July 2023 and September 2024, the rising costs of protein-rich foods, followed by staples and vegetables, were the largest contributors to the increase in healthy diet costs. In contrast, staple foods were the primary driver of rising common diet costs, followed by protein-rich foods (Figure 4). From March to September 2024, rice inflation slowed dramatically, as reflected in the considerably smaller impact of staple foods on rising diet costs. During this period, protein-rich foods had the largest effect on the costs of both the healthy and common diets. The surge in cooking oil prices is seen in the large contribution of cooking oil on common diet costs.

Figure 4: Food group contributions to changing diet costs (%)

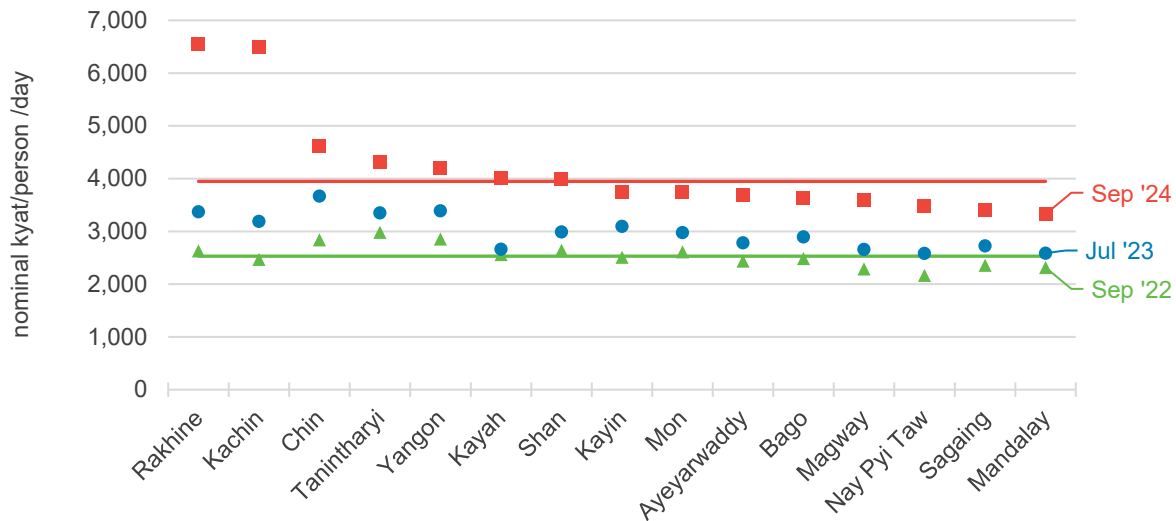


Source: MHWS-FV (Rounds 4,5, and 6)

Regional trends in diet costs

Figures 5 and 6 shows the nominal costs of healthy and common diets by state/region over the past two years, highlighting significant differences. The highest costs for both diet types are found in the conflict-affected states of Rakhine and Kachin. In September 2024, healthy diet costs in these states were about 65 percent above the national average, while common diet costs were approximately 40 percent higher. Diet costs were also relatively high in Chin, Tanintharyi, and Yangon, home to the country's largest city. In contrast, Mandalay, Nay Pyi Taw, and Sagaing show lower diet costs, with common diet costs also notably low in Kayin.

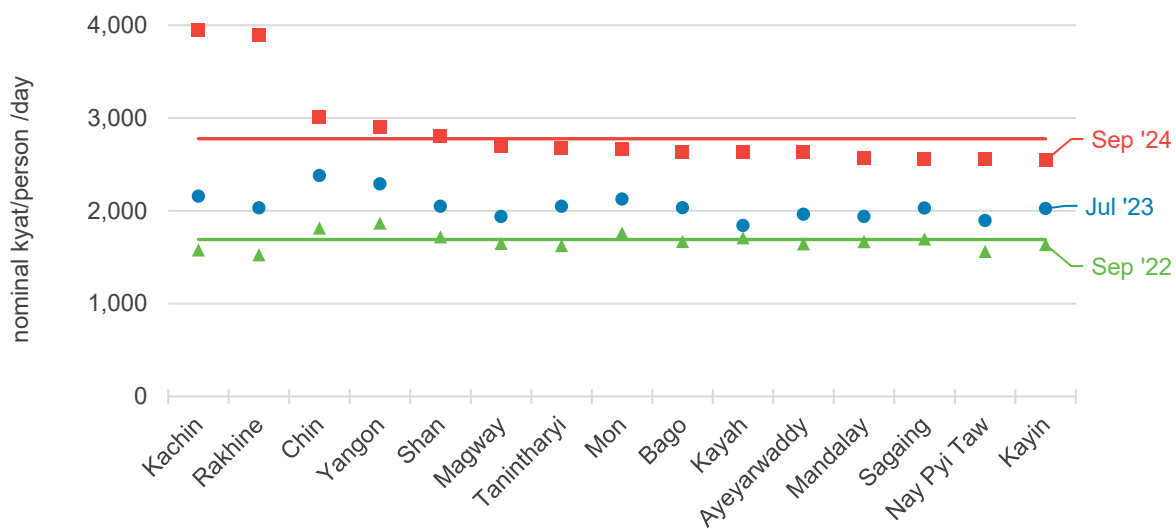
Figure 5: State/region costs of the healthy diet, September 2022– September 2024



Source: MHWS-FV (Rounds 2, 4, 6)

Note: Solid bars refer to national averages for September 2022 (green) and September 2024 (red). Diet costs are estimated using the expanded food list which includes eggs, pork, and tomatoes.

Figure 6: State/region costs of the common diet, September 2022– September 2024



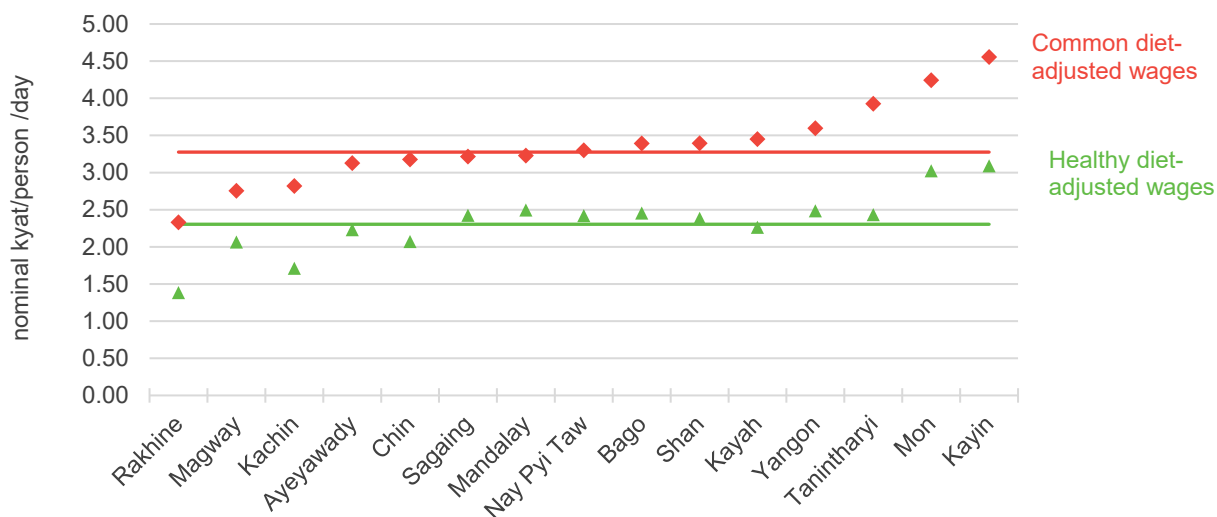
Source: MHWS-FV (Rounds 2, 4, 6)

Note: Solid bars refer to averages in the full sample for September 2022 (green) and September 2024 (red). Diet costs are estimated using the expanded food list which includes eggs, pork, and tomatoes.

Diet costs reported in Figures 5 and 6 do not account spatial differences in living costs. To better understand how the affordability of diets varies across states and regions, Figure 7 presents diet-adjusted wages. Diet-adjusted wages indicate the number of common or healthy diet food baskets

that can be purchased with a single day's wage earned by casual laborers—one of Myanmar's most vulnerable populations.⁸ **Healthy and common diets are least affordable in Kachin, Rakhine and Magway and most affordable in Kayin and Mon.** Casual wages are relatively higher in the eastern part of the country—particularly Kayin, Mon, Kachin, and Tanintharyi—likely due to better migration opportunities. Despite relatively high wages in Kachin, diet costs remain largely unaffordable for casual wage earners. In contrast, the relatively high wages in Yangon make diet costs more affordable.

Figure 7: State/region diet-adjusted wages: average wages (April/June 2024) relative to average healthy and common diets costs (September 2024)



Source: MHWS-FV (Round 6) and MHWS (Round 7)

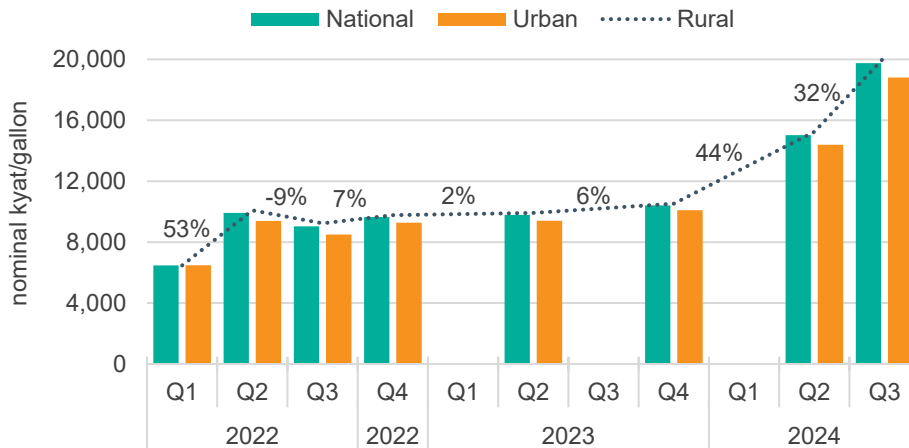
Note: Solid bars refer to averages in the full sample for healthy (green) and common (red) diet-adjusted wages. Average casual wages are obtained from the round 7 of the MHWS (April/June 2024) just prior to round 6 of the MHWS-FV (September 2024).

⁸ Wages are obtained from the April/June 2024 MHWS in periods just prior to the September 2024 MHWS-FV.

Nonfood prices

Figure 8 shows petrol prices across all seven MHWS rounds, along with the September 2024 round of the MHWS-FV. Petrol prices increased sharply between the first and second quarters of 2022, then remained relatively stable until the end of 2023. **From the fourth quarter of 2023 to the third quarter of 2024, petrol prices rose by 90 percent, with rural prices increasing more than urban prices (91 percent versus 86 percent).**

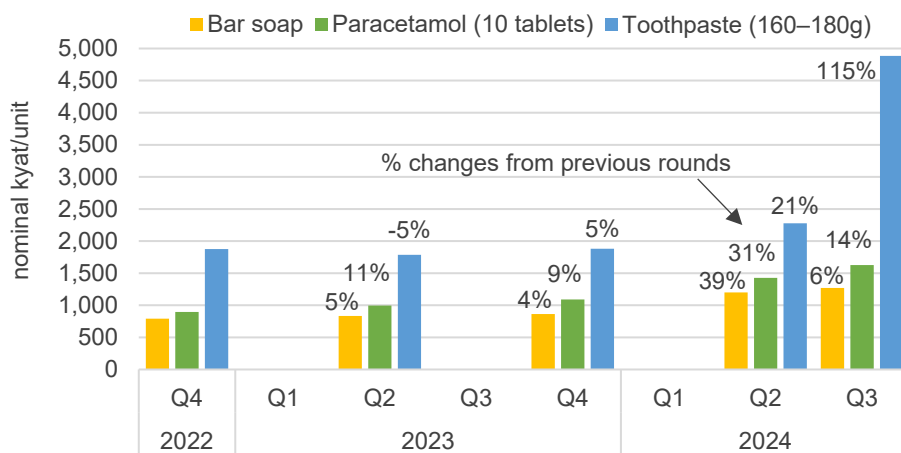
Figure 8. Petrol prices (nominal kyat/gallon) and inflation (percent), by round



Source: MHWS-FV (Round 6) and MHWS (Rounds 1-7)

Figure 9 shows trends in the prices of bar soap, toothpaste, and paracetamol between the fourth quarter of 2022 and the third quarter of 2024 (September 2024). Like petrol, prices changed little until the end of 2023. Between the fourth quarter of 2023 and the third quarter of 2024, the price of bar soap and paracetamol rose nearly 50 percent (47 and 49 percent, respectively) and toothpaste rose by 160 percent. These price trends indicate that in 2024 the burden of continually rising diet costs has been compounded by the rapidly rising prices of petrol prices and a limited set of health and hygiene products.

Figure 9. Hygiene and medicine prices (nominal kyat/unit), by round



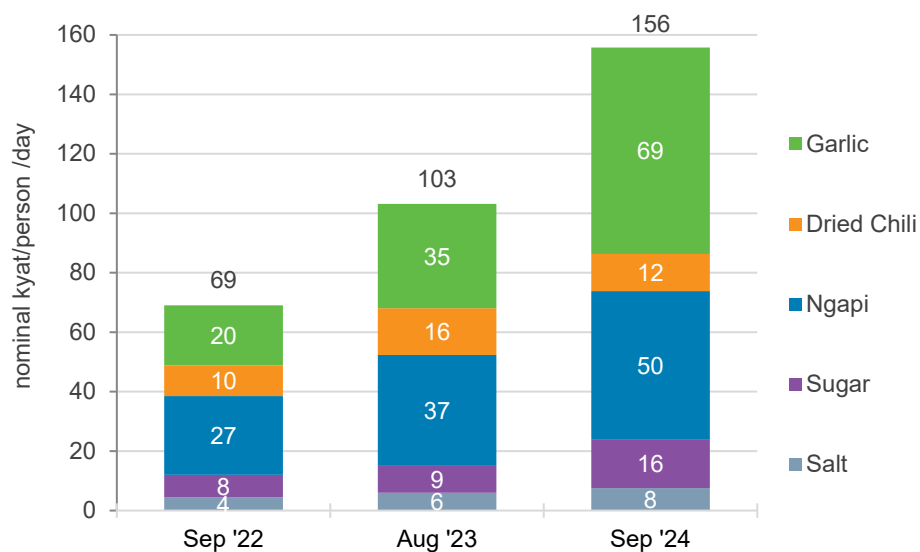
Source: MHWS-FV (Round 6) and MHWS (Rounds 4-7)

Appendix

The cost of seasonings in the diet

Seasonings play an important role in Myanmar’s food culture and daily diets. In the July 2023 round of the MHWS–FV, we began collecting prices for common seasonings, including garlic, dried chili, ngapi, sugar, and salt. Rather than incorporating seasonings into the healthy and common diets, we monitor their costs separately. Seasonings represent a relatively small expense—adding them to the healthy and common diets would increase total diet costs by 4 and 5 percent, respectively. As with the common diet, we aggregate the costs of the six seasonings into a basket using average consumption quantities from the 2015 MPLCS. In September 2024, the typical cost of seasonings in the Myanmar diet was 157 kyat per person per day—an increase of 53 percent compared to July 2023 (Figure 4) —primarily driven by a 99 percent rise in the average cost of garlic. The increase in seasoning costs over this period was much higher than the 36 percent rise in the cost of the common diet. Between September 2022 and September 2024, significant increases in the costs of garlic and ngapi led to a 127 percent rise in seasoning costs—more than double the 58 percent increase in the common diet over the same period.

Figure 10: Seasoning costs, September 2022–September 2024



Source: MHWS-FV (Round 3–5).

Note: Food vendors in July 2023 are asked to recall seasonings prices from one year earlier.

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