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Agricultural Input Retailers in Myanmar

Insights from the 2025 Monsoon Season

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This Research Note presents results from an August 2025 phone survey of 227 agricultural input retailers – who provide agricultural inputs and informal credit to farmers – in Myanmar's major agro-ecological zones.

Key Findings

- **Input sales declined sharply in the 2025 monsoon relative to 2024.** Fewer retailers sold inorganic fertilizers and pesticides, and aggregate sales for those who did sell declined by 31 percent for inorganic fertilizer and 10 percent for pesticides.
- **The decline is not solely due to supply shortages: smaller areas planted, weaker farm profits, and conflict have dampened demand**, **while climate change and the 2025 earthquake add to input market stress.** Two-thirds of retailers cite lower input demand from climate change in the past three years, and earthquake impacts – while more localized – disrupted market access and areas planted.
- **Transport remains the dominant business disruption.** Even with a slight drop in overall reported disruptions compared to 2024, transport problems – higher costs, checkpoints and roadblocks – still dominate. Long input supply chains dependent on imports and flowing through Yangon mean that checkpoints and higher costs compound as inputs reach rural farmers.
- **Farmer finances are stressed, especially in rice-dominant areas.** Farmers are asking for and taking more credit from input retailers. This likely reflects tighter liquidity following the recent global rice price decline, which has reduced incentives and profitability for monsoon paddy.
- **Credit provision is expanding but adding risk.** More retailers are providing credit to farmers and sourcing their inputs on credit from suppliers. Yet, two-thirds of retailers that provided credit in 2024 still have unpaid debts from farmers, raising the risks of cascading financial stress.
- **Measures to ease transport constraints, stabilize access to imported fertilizers and pesticides, and expand formal credit options for both farmers and retailers would help sustain this essential link in the agrifood system.**

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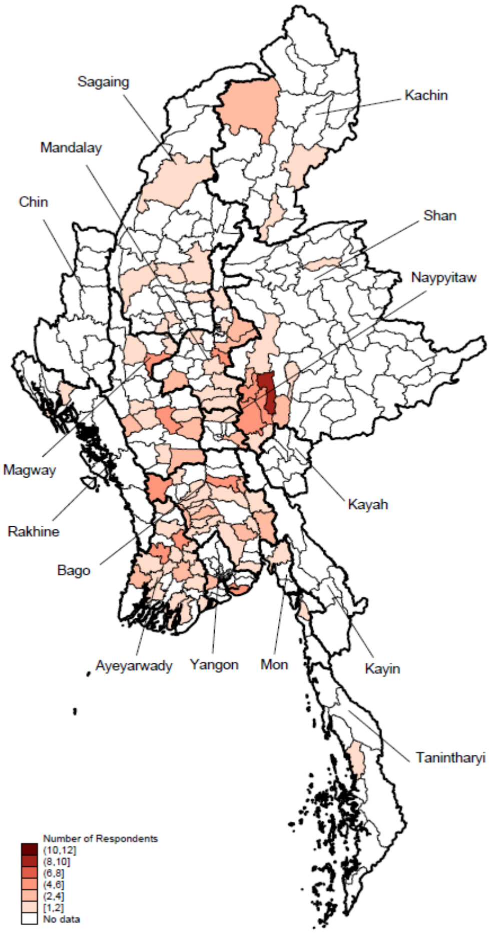
Background

Agricultural input retailers remain a cornerstone of Myanmar's agri-food system, providing farmers with fertilizers, seeds, pesticides, and other essential inputs. Their importance extends beyond input sales: many retailers also offer credit, technical advice, and market information, positioning them as key links between farmers and markets. Since 2020, the agricultural input sector has operated through repeated shocks including political instability, conflict, exchange rate volatility, and high inflation. Previous Research Notes in this series[1] have documented how these disruptions have affected input sales volumes, increased reliance on credit, and eroded the provision of support services to farmers.

This Research Note presents findings from the August 2025 round of the Agricultural Input Retailer Survey, and documents how these shocks continue to strain input supply chains, highlighting not only the persistence of disruptions but also the ways retailers are adapting to a changing operating environment. The analysis maintains continuity with previous rounds by covering (i) business disruptions in 2025 and their evolution since 2024, (ii) year-on-year changes in operations, sales, and input prices, and (iii) credit provision and transaction practices. In addition to these core topics, this round also introduces new analysis on the effects of climate change and the 2025 earthquake on input sales.

Figure 1. Map of respondent locations



Source: Input Retailer Survey, August 2025.

The sample of private input retailers for the August 2025 survey round consists of 227 respondents distributed across Myanmar (Figure 1), though it is important to note that the sample is not representative of the population of input retailers in Myanmar. While we have good coverage in three of the major agro-ecological zones (AEZs) – the Hills, Dry Zone, and Delta – the sample is relatively thin in the Coastal areas. Our focus is on private retailers only, and the sample does not include any direct government input distribution channels. While there is some ongoing government support for agricultural production – most notably through the State Economic Promotion Fund (SEPF) – much of that support is administered through the private sector. The sample of respondents changes in each survey round, and to prevent potential sampling biases in estimating year-over-year changes, we use a balanced panel of respondents – either by using the common sample between 2024 and 2025 rounds, or by using recall data.

The share of respondents that were inactive (i.e., not selling any inputs) during the 2025 monsoon season was 24 percent (Table 1). This is an 11 percentage point increase relative to 2024 and a surprisingly high rate of inactivity during the monsoon peak season for input sales. A small number of retailers ceased operations in 2025,

[1] The Input Retailer Survey has been ongoing since 2020. The most recent Research Note was published in 2024.
Myanmar Agrifood Program for Strategy and Analysis. 2024. Monitoring the agri-food system in Myanmar: Agricultural input retailers – August 2024 survey round. Myanmar SSP Research Note 117. Washington, DC: International Food Policy Research Institute. https://hdl.handle.net/10568/162758

reflecting the sector's ongoing fragility. Inactivity rates vary geographically and were highest in the Hills (35 percent) and the Dry Zone (29 percent), but considerably lower in the Delta (15 percent). Retailers most frequently cited political instability and conflict as the reason for inactivity (65 percent overall). This explanation was especially prominent in the Dry Zone (79 percent) and Hills (71 percent) relative to the Delta (38 percent) where higher shares mentioned domestic supply shortages (25 percent).

Table 1. Input retailer sample, active and inactive by agro-ecological zone, and reasons for inactivity

		Agroecological zone			
Activity status	**All**	**Delta**	**Dry Zone**	**Hills**	**Coastal**
Activity status in 2025 monsoon season					
Active	173	90	47	32	4
Inactive	54	16	19	17	2
Total	227	106	66	49	6
Share inactive during 2025 monsoon season	24%	15%	29%	35%	33%
Main reason for inactivity					
Political instability / conflict	65%	38%	79%	71%	
Reduced supply/availability - domestic	17%	25%	11%	18%	
Crop price decline/lower farm profit	15%	13%	11%	24%	
Change in farmer area planted	6%	13%	0%	6%	
Transport costs	15%	13%	21%	12%	
Poor health	11%	25%	5%	6%	
Others	11%	13%	0%	24%	
Share planning to re-open	39%	25%	26%	59%	

Source: Input Retailer Survey, August 2025.

Table 2 summarizes descriptive characteristics of the input retailers interviewed in August 2025 by AEZ. Average sales values among active retailers were lowest in the Hills (62 million MMK in the last 30 days), compared to 96 million MMK in the Dry Zone and 91 million MMK in the Delta. The highest margin products were inorganic fertilizers (54 percent of retailers), followed closely by pesticides (41 percent), with broadly similar patterns across zones.

The main crops grown by farmers serviced by input retailers in the monsoon vary regionally. Rice was dominant in the Delta (93 percent), while oilseeds and pulses were more common in the Dry Zone (81 percent). In the Hills, rice is common (75 percent) but maize (56 percent) and vegetables (38 percent) were also important, underscoring the more diversified farming systems there. By contrast, vegetables were far less frequently mentioned in the Delta (8 percent).

Given input retailers' importance in providing information to farmers, we asked them questions about any formal training they have received on input use. Most input retailers (87 percent) reported having received training on inputs at some point. The government extension system was the most common provider (75 percent overall), followed closely by private input companies (61 percent), with little reliance on peer-to-peer learning. Training most frequently covered pesticides (97 percent) and inorganic fertilizers (82 percent), while about half also reported coverage of organic fertilizers (49 percent).

Table 2. Descriptive statistics of input retailer sample, by agroecological zone

		Agroecological zone		
	All	Delta	Dry Zone	Hills
Sales value if active (last 30 days; million MMK)	84	91	96	62
Highest margin product				
Inorganic fertilizer	54%	58%	50%	53%
Pesticides	41%	39%	41%	44%
Main crops grown by farmers served				
Rice	83%	93%	68%	75%
Maize	17%	6%	11%	56%
Oilseeds/pulses	57%	57%	81%	22%
Vegetables	19%	8%	26%	38%
Ever received training on inputs	87%	91%	87%	75%
Who provided the training?				
Gov't extension	75%	72%	78%	79%
Private input company	61%	64%	63%	46%
Another farmer	1%	1%	0%	0%
What inputs were covered?				
Inorganic fertilizer	82%	83%	83%	75%
Pesticides	97%	95%	98%	100%
Organic fertilizer	49%	45%	54%	54%

Source: Input Retailer Survey, August 2025.

Business disruptions

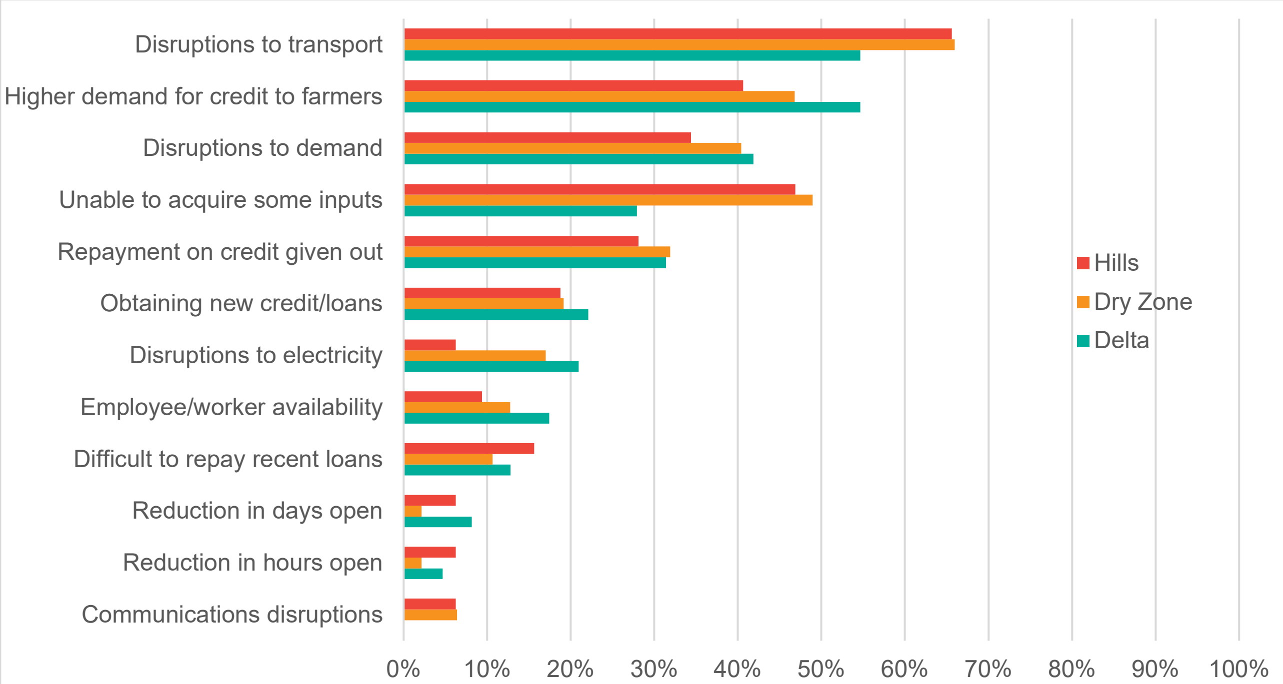
Agricultural input retailers continued to face widespread disruptions in 2025 (Figure 2). Overall, the share of input retailers reporting each disruption declined relative to 2024. However, the structure of challenges remains broadly unchanged, with transport challenges continuing to dominate as more than half of retailers in each AEZ reported disruptions. Among those reporting transport issues, 73 percent cited higher costs of hired transport and fuel. Roadblocks and checkpoints were also common and most severe in the Hills (86 percent), but also widespread in the Dry Zone (65 percent) and Delta (61 percent).

High shares of retailers across AEZs also reported an increase in farmer demand for credit and disruptions in farmer demand for inputs, highlighting the continuing financial pressures on farmers. These disruptions are highest in the Delta, where rice dominates, likely reflecting tighter liquidity constraints among rice farmers following the recent global decline in rice prices, which has reduced farm profitability and purchasing power.[2] These disruptions place greater financial stress on input retailers and more than 25 percent in each AEZ reported challenges in recovering repayment for credit lent to farmers.

In contrast, the Delta was relatively less affected by disruptions in acquiring inputs, likely due to its stronger transport and trade links as well as relatively lower conflict incidence. Input shortages were most severe in the Hills and Dry Zone, affecting nearly half of retailers. The most common inputs affected by supply challenges were inorganic fertilizers and pesticides.

[2] Minten, Bart; Aung, Zin Wai; Htar, May Thet; and Masias, Ian. 2025. Global rice price declines and expected effects on monsoon paddy farming: Insights from key informants. Myanmar SSP Research Note 121. Washington, DC: International Food Policy Research Institute.

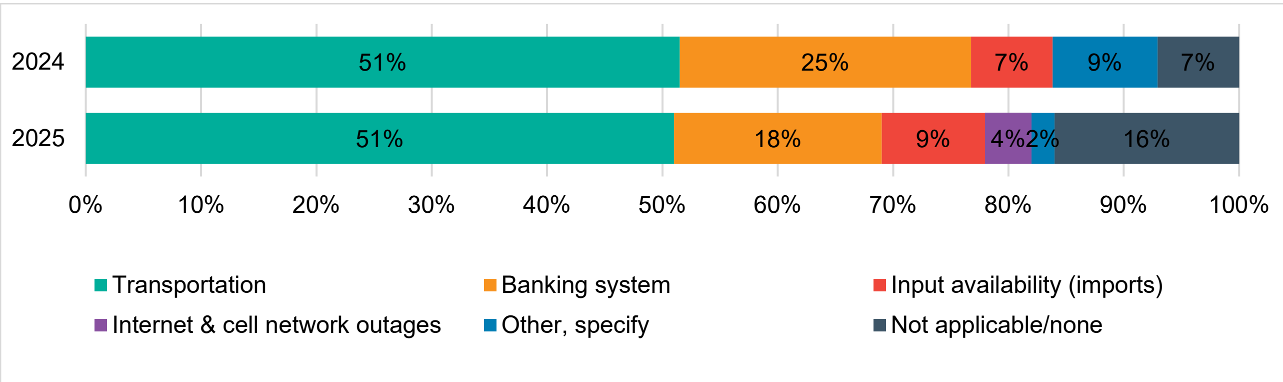
Figure 2. Shares of input retailers experiencing disruptions in 30 days prior to interview, by agroecological zone



Source: Input Retailer Survey, August 2025.

Figure 3 compares the main business disruptions between 2024 and 2025 using a balanced panel of 55 retailers who responded to the question in both the 2024 and 2025 surveys. In both years, transportation was identified as the single most important problem, cited by 51 percent of retailers. This stability highlights the persistence of transport constraints across rounds. Reports of banking difficulties were lower in 2025 than in 2024, suggesting some easing in financial access or adaptation by retailers.

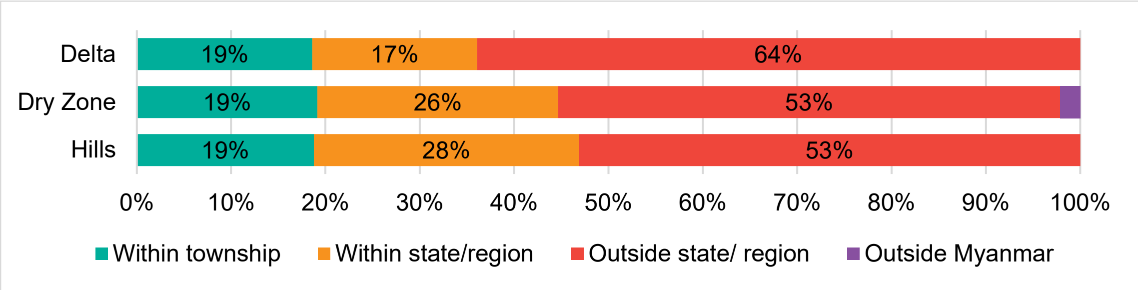
Figure 3. Main business disruption in the past 30 days, 2025 compared to 2024 (common sample, N=55)



Source: Input Retailer Surveys, August 2025 and July 2024.

The greater the distance inputs need to travel to reach retailers and farmers, the more opportunities there are for transport challenges to disrupt supply. Most input retailers interviewed primarily source inputs outside of their State or Region, and smaller shares source locally, either within their townships or within their State or Region (Figure 4). Input shops in the Delta are most likely to source inputs from outside their State/Region. However, most inputs acquired locally flow out of Yangon – both those imported and produced domestically. Thus, with various crises affecting different areas, mobility between states remains difficult, further complicating input supply chains.

Figure 4. Primary purchase location for inputs in the last 30 days by AEZ

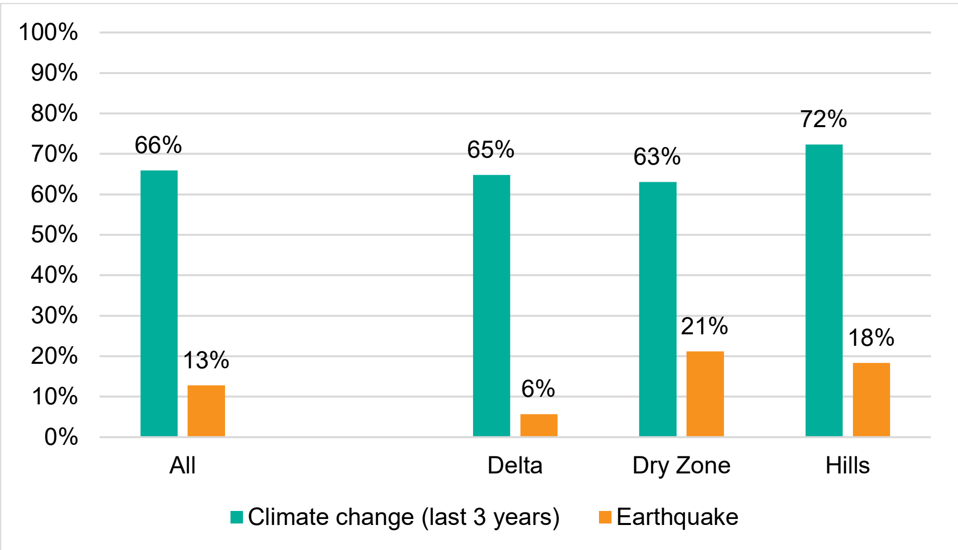


Source: Input Retailer Survey, August 2025.

In the 2025 survey, we asked if input sales have been affected by either the 2025 earthquake or climate change (Figure 5). Overall, retailers perceive modest, but important, impacts of the earthquake on input demand and supply chains. Effects were strongest felt closest to primary quake impact areas in the Dry Zone (21 percent) and Hills (18 percent), while the Delta (6 percent) was relatively less affected. The primary reported effects were a decline in the area planted (either through farmer uncertainty or farmland damage) and challenges in market access and infrastructure damage.

The perceived impacts of climate change are much more pronounced. Two-thirds of all retailers report declines in sales stemming from climate changes in the last three years. There is variation across AEZs, with the Hills showing relatively greater impacts (72 percent) than the Delta (65 percent) and Dry Zone (63 percent). The main reported effect is a reduced area cultivated by farmers, which directly correlates with a reduction in the use of agricultural inputs. Retailers also mentioned that farmers require different inputs (fertilizers, pesticides, and seeds) over the past three years, requiring retailers to adjust and tailor the products they sell to meet changing farmer demand.

Figure 5. Shares of retailers reporting input sales effects from climate change and the 2025 earthquake, by AEZ



Source: Input Retailer Survey, August 2025.

Input sales during the 2025 monsoon season

The cumulative effects of these persistent and widespread disruptions have been a decline both in the shares of input retailers selling different products and a decline in sales volumes across products. Table 3 shows the shares of input retailers selling various inputs using the common sample of shops from the 2024 and 2025 surveys. The most commonly sold products are urea, compound fertilizer, insecticides/fungicides, and herbicides, each with around half of the sample selling during the 2025 monsoon season. But each of these products shows a decrease in the shares of retailers selling it relative to the 2024 monsoon, ranging from a 1 percentage point (pp) decline for insecticides and fungicides, to a 15 pp decline for herbicides. Urea shows a 7 pp decline and compound fertilizer an 12 pp drop. Each input category asked about, spanning fertilizers, agrochemicals, and seeds, shows declines.

Table 3. Shares of active retailers selling inputs in 2025 and 2024 monsoon seasons, common sample only (N=71)

	2025	2024	Pp Change
Fertilizers			
Urea	59%	66%	-7%
Compound fertilizer	56%	68%	-12%
Lime-gypsum	20%	55%	-35%
Ammonium	17%	49%	-32%
Potash	11%	28%	-17%
T-super	11%	24%	-13%
Organic fertilizers	3%	13%	-10%
Agro-chemicals			
Herbicides	45%	61%	-16%
Insecticides/fungicides	54%	55%	-1%
Seed			
Vegetable	13%	35%	-22%
Rice	13%	21%	-8%
Maize	6%	23%	-17%
Legume	0%	18%	-18%
Oilseed	0%	7%	-7%

Source: Input Retailer Survey, August 2025.

In addition to declines in the shares of retailers selling products, sales volumes among those input retailers selling also fell substantially in the 2025 monsoon relative to 2024. Table 4 shows the changes in aggregate sales volumes of inputs among those input retailers selling each input during the 2025 monsoon season using recall data for 2024 monsoon season sales. The recall data provide a larger sample than using the balanced panel for the 2025 and 2024 seasons, however these calculations exclude input retailers that sold an input during the 2024 monsoon season, but did not sell the input in the 2025 monsoon season, and therefore underestimate the actual decline in input sales given the decrease in input retailers selling inputs shown in Table 3.

There are very few cases where input sales increased: herbicides and maize seed in the Dry Zone, and vegetable seed in the Hills. All other AEZ and input combinations show decreases. Inorganic fertilizer sales quantities show an alarming aggregate decline of 31 percent in the full sample. Pesticides show a smaller but still striking decline by 10 percent in the 2025 monsoon season relative to 2024. Rice seed – sold by 13 percent of retailers in 2025 – shows an aggregate sales decline of 10 percent.

Overall, these patterns suggest a broad decline in farm input use, including lower nutrient application to crops and lower agrochemical applications to prevent or control diseases, weeds, and pests. Rice production may be especially affected as the primary rice producing area in the Delta shows the largest declines in inorganic fertilizer and pesticide sales. Though other cropping systems are likely also affected. The Dry Zone (primarily oilseeds, pulses, and rice) shows similar declines in the inorganic fertilizer sales to the Delta, but smaller declines in pesticide sales. While the Hills (rice, maize, and vegetables) shows the opposite pattern, with a relatively modest, though still substantial decline in inorganic fertilizer sales (-13 percent), and an 11 percent decline in pesticide sales.

Table 4. Changes in year-over-year aggregate sales volume of inputs among the sample of input retailers selling in the 2025 monsoon season

		Agroecological zone		
	All	Delta	Dry Zone	Hills
Fertilizers				
All inorganic fertilizer	-31%	-33%	-31%	-13%
Urea	-36%	-33%	-44%	-27%
Compound	-24%	-31%	-16%	-10%
Ammonium	-25%	-39%	-24%	-
T-super	-42%	-45%	-33%	-
Potash	-40%	-41%	-39%	-
Organic fertilizer	-20%	-14%	-24%	-
Pesticides				
All pesticides	-10%	-13%	-3%	-11%
Herbicides	-5%	-8%	4%	-12%
Insecticides	-16%	-23%	-3%	-16%
Fungicides	-9%	-	-31%	-4%
Seed				
Rice seed	-8%	-5%	-25%	-
Maize seed	13%	-	14%	-
Vegetable seed	-5%	-37%	-2%	5%

Source: Input Retailer Survey, August 2025.
Only estimates >5 observations included

The fertilizer sales declines are unlikely to be driven by price increases as fertilizer prices have seen only small nominal changes relative to 2024 (Table 5). Overall, urea prices increased by 5 percent on average and compound prices remained unchanged. Urea prices increased the most in the Hills (9 percent) followed by the Delta (6 percent) but declined slightly in the Dry Zone (-3 percent). However, prices in the Dry Zone are still more expensive than in the Delta, and prices in the Hills are higher still. Compound fertilizer prices decreased slightly in the Delta (-3 percent) and increased in the Dry Zone (9 percent) and Hills (4 percent).

Table 5. Year-over-year price changes for urea and compound fertilizer, agroecological zone (balanced panel)

	All	Delta	Dry Zone	Hills
Urea (MMK/50kg)				
2025	119,657	112,920	129,000	144,000
2024	113,729	106,300	133,000	131,600
%change	5%	6%	-3%	9%
Compound (MMK/50kg)				
2025	146,903	138,762	153,333	180,000
2024	146,903	143,619	140,833	173,250
%change	0%	-3%	9%	4%

Source: Input Retailer Survey, August 2025.

Thus, supply shocks are not the only driver of sales declines, but demand must have declined as well. We asked input retailers their perceived reasons for input sales declines, which are largely driven by three related factors: lower farm profitability (from lower crop output prices), political instability/conflict, and changes in areas planted by farmers (Table 6).

In the Delta – a rice dominant system – lower farm profits are the most common reason for declines in input sales (44 percent), but in the Dry Zone and especially in the Hills, political instability is the leading cause. The reasons for changes in seed sales differ from those for fertilizers and pesticides as changes in areas planted are the most important (57 percent).

Table 6. Reasons for year-over-year sales changes, by input category and agroecological zone

		Input category				Agroecological zone		
	All	Inorganic fertilizers	Organic fertilizers	Seeds	Pesticides	Delta	Dry Zone	Hills
Crop price decline/lower farm profit	35%	34%	46%	14%	38%	44%	27%	22%
Political instability / conflict	27%	28%	17%	17%	30%	19%	32%	48%
Change in farmer area planted	22%	17%	17%	57%	22%	19%	24%	28%
Reduced supply/availability - domestic	4%	7%	0%	3%	3%	4%	7%	0%
Reduced supply/availability - import	2%	3%	3%	3%	0%	1%	4%	0%
Others	10%	11%	17%	6%	7%	13%	7%	3%

Source: Input Retailer Survey, August 2025.

Credit

Input retailers also play an important role in informal credit provision to farmers. Table 7 summarizes the credit situation for our sample – both credit extended to farmers and credit taken in – with comparisons to the 2024 monsoon season. Overall, the share of input retailers providing some credit to farmers increased slightly from 65 percent in 2024 to 69 percent in 2025. Retailers in the Delta were most likely to provide credit (79 percent), and while the Dry Zone and Hills had the same share of retailers giving credit, their year-over-year changes moved in opposite directions, with a 10 pp increase in the Dry Zone and a 4 pp decrease in the Hills.

Conditional on providing credit, the share of farmers receiving credit also increased slightly during the 2025 monsoon season. This is driven by a 7 pp increase in the Delta while the Dry Zone and Hills show modest declines. Likewise, the conditional average value of credit provided increased in 2025. Retailers in the Hills provided the highest conditional credit value on average, followed by the Delta, and, much lower, the Dry Zone retailers.

With the increased credit provision to farmers, a growing concern is input retailer debt burden. Concerningly, 66 percent of input retailers that offered credit in the 2024 monsoon still have farmers that have not fully repaid. The highest rate of non-repayment is in the Hills (80 percent). Among those providing credit, the average number of farmers that have not repaid is 15.

Input retailers may be pressured with debt burdens from their suppliers as well. The patterns for receiving inputs on credit mirror those for providing credit to farmers, with increases in both the share of retailers receiving inputs on credit (42 percent in 2025 relative to 36 percent in 2024), and the conditional share of inputs taken on credit (38 percent relative to 34 percent). Overall, input retailers are expanding their role as informal agricultural lenders, but the combination of persistent farmer non-repayment and an increased reliance on supplier credit could heighten financial pressures and expose retailers to greater credit risk.

Table 7. Input retailer credit detail – out to farmers, and taken in for inputs – 2024 and 2025, agroecological zone

		Agroecological zone		
	All	Delta	Dry	Hills
Credit out to farmers				
Share of providing credit out				
2025	69%	79%	59%	59%
2024	65%	74%	49%	63%
Conditional share of farmers receiving credit				
2025	45%	48%	42%	35%
2024	41%	41%	43%	38%
Conditional value of credit out (‘000,000 MMK)				
2025	26	29	8	45
2024	25	27	8	36
Farmer repayment of 2024 credit				
Conditional share with outstanding payment	66%	61%	65%	80%
Conditional mean number of farmers not repaid	15	15	10	17
Credit in for inputs				
Share of retailers taking inputs on credit				
2025	42%	44%	40%	38%
2024	36%	39%	30%	41%
Conditional share of inputs on credit				
2025	38%	37%	47%	27%
2024	34%	35%	37%	28%

Source: Input Retailer Surveys, August 2025 and July 2024.

Discussion

Our data show growing vulnerability in Myanmar’s agricultural input sector during the 2025 monsoon season. Input retailers report lower sales of inorganic fertilizers, pesticides, and paddy seed compared to 2024, which they attribute to declines in areas cultivated, weaker farm profits, and conflict. These sales declines are corroborated by evidence from other sources. Key informants in the input retail sector noted declines in compound fertilizers and pesticides during the 2025 monsoon season. Early evidence from a national survey of farmers shows (i) a net decline in the number of farmers growing paddy by about 1.5 percent, (ii) declines in paddy areas among those cultivating (7 percent report less paddy area than last year), and (iii) a decline in expected paddy harvest volumes, with 10% of farmers reporting a drop by 20 percent or more. One quarter of farmers expecting lower production attribute the drop to lower agro-chemical use. Finally, a survey of Tractor Service Providers shows an overall decline in acres prepared by 12 percent.[3]

These demand-side disruptions are compounded by supply-side issues in accessing inputs to sell and continuing logistical constraints. Transport challenges are persistently the largest disruption, as higher costs and checkpoints strain the long supply chains between Yangon and rural farmers.

While informal credit – both credit extended to farmers, and credit received from suppliers – expanded slightly in 2025, it likely places growing financial pressures on farmers and retailers. Two-thirds of retailers that provided credit to farmers in the 2024 monsoon season still have some outstanding farmer balances.

Shocks from climate change and the 2025 earthquake add further strain. Two-thirds of retailers report that climate change has reduced farmer input use over the past three years, while the 2025 earthquake disrupted market access and planting in affected areas.

While the input sector has been adapting well in some ways, these stressors combine to increase its fragility. Supporting Myanmar’s input retailers is critical for maintaining farm productivity and food

[3] Masias, Ian; Htar, May Thet; and Oo, Theingi. 2025. Tractor service providers in Myanmar: Early insights from the 2025 monsoon season. Myanmar SSP Research Note 124. Washington, DC: International Food Policy Research Institute. https://hdl.handle.net/10568/176592

security. Measures to ease transport constraints, stabilize access to imported fertilizers and pesticides, and expand formal credit options for both farmers and retailers would help sustain this essential link in the agrifood system. Without such support, ongoing conflict, climate shocks, and financial stress risk further constraining the flow of inputs and credit that underpin agricultural production.

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