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MONTHLY FOOD PRICE REPORT **AUGUST 2026**

Myanmar Monthly Food Price Report – July 2026

May Thet Htar, Bart Minten, and Ian Masias

KEY HIGHLIGHTS

- Rice prices increased moderately in July 2026, with the national average rising by 3.6 percent month-on-month and 10.1 percent year-on-year. Regional price disparities persisted, reflecting differences in production conditions, market access, and transport costs.
- Most export crop prices showed mixed movements. Maize prices declined following strong export activity earlier in the year, although prices remained well above year-earlier levels. Black gram and pigeon pea prices increased on expectations of stronger import demand from India, while green gram prices showed limited movements amid increasing quality requirements across export markets.
- Vegetable prices also showed mixed trends. Onion prices increased sharply, supported by continued exports and declining stocks in major producing areas, while garlic prices also increased following reports of lower Chinese garlic supplies in Shan markets. Potato prices showed divergent trends across markets, declining in Shan State amid increased monsoon arrivals but increasing at the national level.
- Most animal-sourced food prices remained substantially above year-earlier levels, while month-on-month movements were mixed. Chicken and egg prices increased notably amid higher feed costs, limited supplies of large-sized chickens, and reduced egg production associated with higher input costs and disease outbreaks. Mutton prices remained at record highs. Fish prices also remained above previous year, although increased catches following the resumption of fishing activities contributed to lower prices for some fish products.
- The conflict in Iran and the partial closure of the Strait of Hormuz, a major transit route for global oil and fertilizer trade, are raising concerns for Myanmar's agrifood system, which depends heavily on fuel for transportation, irrigation, mechanization, and processing. During the 2026 monsoon, some farmers reported cultivating smaller areas or reducing plowings because of higher fuel costs. Fertilizer prices also remain substantially above last year's levels, while crop output prices have changed relatively little, reducing the profitability of fertilizer use and potentially leading to lower application rates and agricultural production.
- Flooding has affected monsoon rice cultivation in some areas, while flood warnings have been issued for other parts of the country, including areas along the Bago and Sittaung rivers. While the reported impacts on rice cultivation remain geographically limited, continued monitoring of flood conditions will be important given potential implications for crop production, transportation, and food supply chains.

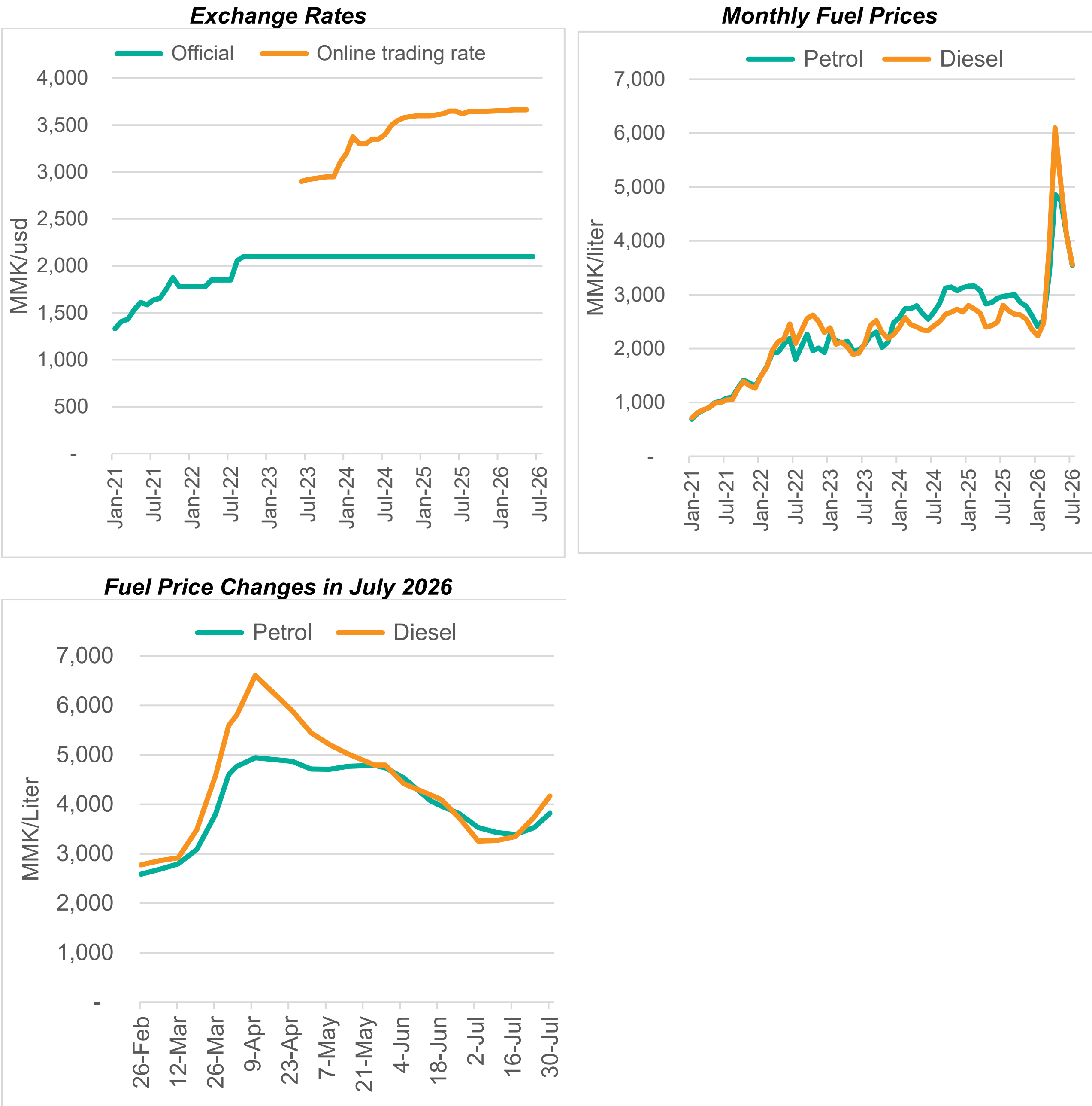
Introduction

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 July 2026, the official exchange rate remained unchanged at 2,100 MMK/USD – at the same level for almost four years (Figure 1). The online trading exchange rate increased marginally by 0.4 percent compared to July 2025, indicating relatively stable formal 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 remained elevated in July 2026 following trade disruptions linked to the partial closure of the Strait of Hormuz, with diesel rising sharply toward the end of the month. At the end of July 2026, diesel prices were 50 percent higher and petrol prices 48 percent higher than prior to the start of the conflict. Relative to the same month in 2025, diesel prices in July 2026 increased by 27 percent while the petrol price increased by 19 percent (Figure 1). While prices have declined from their high levels in April, they increased again toward the end of July compared with the beginning of the month. Diesel prices were 28 percent higher in the last week of July than in the first week (Figure 1). Moreover, fuel remains scarce in parts of the country, with sharp price increases in remote and conflict-affected areas.

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 by 3.6 percent month-on-month and 10.1 percent year-on-year in July 2026, while regional price movements varied considerably. A comparison of rice prices across different regions and states reveals the following:

- Rice prices increased month-on-month across most regions and states. The largest increases were observed in Kachin (20.0 percent), Shan (South) (9.7 percent), Nay Pyi Taw (9.4 percent), and Mandalay (8.6 percent). Ongoing conflict along the Mandalay-Myitkyina route may continue to constrain commodity movements between Mandalay and Kachin, with implications for rice prices in both markets. Prices remained mostly unchanged month-on-month across several states and regions.

- Year-on-year price trends remained mixed across regions and states. The largest increases were recorded in Kachin (37.1 percent), Tanintharyi (32.3 percent), Nay Pyi Taw (25.0 percent), and Mon (17.9 percent), while prices declined in Shan (East) by 18.3 percent and remained unchanged in Kayin and Magway.
- Regional price gaps remained pronounced. Shan (North and East), Kachin, and Tanintharyi recorded prices above the national average, while Ayeyarwady, Bago, Shan (South), and Mon remained below the national average. Kachin recorded the highest price, at around 26 percent above the national average, while Ayeyarwady was about 15 percent below the national average.

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

	Comparison over Time (nominal prices)					Comparison of States/Regions (relative to national average)		
	Jul-26	Jul-25		Jun-26		Jul-26	Jul-25	Jun-26
State/Region	**Current**	**Last Year**		**Last Month**		**Current**	**Last Year**	**Last Month**
Kachin	2,256	1,645	37.1%	1,880	20.0%	1.26	1.01	1.09
Shan (North)	2,115			2,350	-10.0%	1.18		1.36
Shan (East)	1,997	2,444	-18.3%	1,997	0.0%	1.12	1.50	1.16
Shan (South)	1,598	1,551	3.0%	1,457	9.7%	0.89	0.95	0.84
Kayah	1,880	1,786	5.3%	1,880	0.0%	1.05	1.10	1.09
Kayin	1,645	1,645	0.0%	1,551	6.1%	0.92	1.01	0.90
Mon	1,551	1,316	17.9%	1,504	3.1%	0.87	0.81	0.87
Tanintharyi	1,927	1,457	32.3%	1,786	7.9%	1.08	0.90	1.03
Yangon	1,598	1,504	6.2%	1,551	3.0%	0.89	0.93	0.90
Ayeyarwady	1,527	1,410	8.3%	1,527	0.0%	0.85	0.87	0.88
Sagaing	1,880	1,739	8.1%	1,880	0.0%	1.05	1.07	1.09
Mandalay	1,786	1,645	8.6%	1,645	8.6%	1.00	1.01	0.95
Magway	1,880	1,880	0.0%	1,880	0.0%	1.05	1.16	1.09
Bago	1,551	1,410	10.0%	1,504	3.1%	0.87	0.87	0.87
Nay Pyi Taw	1,645	1,316	25.0%	1,504	9.4%	0.92	0.81	0.87
National Avg.	1,789	1,625	10.1%	1,726	3.6%	1.00	1.00	1.00

Source: Department of Consumer Affairs

Other Crops

Maize prices declined by 3.0 percent month-on-month following strong export activity earlier in the year. Thailand's CP Group, a major buyer of Myanmar maize, temporarily suspended purchases in July, which may have affected traders and exporters holding stocks. However, with Myanmar reportedly having already exported around 1.21 million tons toward its 1.3 million tons export target, the extent of the impact on domestic maize prices remains uncertain. Despite the month-on-month decline, maize prices remained substantially higher (17.7 percent) than a year earlier, while the extension of Thailand's zero-tariff maize import period until the end of August likely continued to support export demand.

Pulse prices showed divergent trends, with pigeon pea and black gram prices increasing by 7.5 percent and 2.4 percent month-on-month, and by 16.2 percent and 12.4 percent year-on-year, respectively. Reports indicate that India may need to import more than 6 million tons of pulses this year as lower sowing, tight domestic stocks, and uncertainty over crop yields raise concerns over supplies. Expectations of stronger import demand may have supported prices for pigeon pea and black gram in Myanmar. Green gram and chickpea prices remained broadly stable month-on-month, although green gram prices were 4.7 percent lower than a year earlier. Heavy rainfall reportedly increased storage pest risks and pesticide use, while concerns over pesticide residues and grain quality led some Chinese buyers to reject shipments, contributing to the year-on-year decline in green gram prices.

Onion prices continued to increase, rising by 34.2 percent month-on-month and 81.1 percent year-on-year. Continued onion exports through the Myawaddy border trade route have supported domestic prices, which remained higher than the levels typically observed during this period of the year, when seasonal price declines are usually expected. Declining stocks in the main producing regions of Magway, Sagaing, and Mandalay have reduced arrivals to Yangon markets, placing further upward pressure on prices.

Potato prices showed divergent trends across markets. Potato prices in Shan State, a major production area, have reportedly declined amid increased arrivals of monsoon potatoes and weaker demand from frying businesses, while higher arrivals at wholesale markets and storage facilities continue to make it difficult for wholesalers to absorb available supplies. At the national level, however, potato prices increased by 11.8 percent month-on-month. This divergence between reported conditions in the main production area and the national price trend may reflect differences in market supply, transportation costs, and market connectivity. The continued weakness in potato prices in production areas is also placing financial pressure on potato farmers.

Chili prices increased marginally by 0.7 percent month-on-month, indicating relative price stability following the sharp increase recorded in the previous month, which was supported by stronger export demand. Garlic prices increased by 15.0 percent month-on-month, reversing the 4.8 percent decline recorded in the previous month. The increase coincided with reports of Chinese garlic supplies running low in Shan markets. Notably, YRCCI[1]'s daily price listings in Yangon in July no longer included Chinese garlic, while prices for Shan and Myanmar garlic continued to be reported.

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

Commodity	Jul-26 Current	Jul-25 Last Year		Jun-26 Last Month	
Export Crops					
- Maize	1,054	896	17.7%	1,086	-3.0%
- Green Gram	3,290	3,453	-4.7%	3,283	0.2%
- Black Gram	3,261	2,901	12.4%	3,184	2.4%
- Chickpea	2,577	2,374	8.6%	2,598	-0.8%
- Pigeon Pea	3,367	2,897	16.2%	3,131	7.5%
Local Crops					
- Onion	3,172	1,752	81.1%	2,364	34.2%
- Garlic	9,152	7,522	21.7%	7,961	15.0%
- Chili	13,010	10,317	26.1%	12,925	0.7%
- Potato	3,284	3,142	4.5%	2,937	11.8%

Source: Myantrade and DoA - MIS

Animal-Sourced Food

Most animal-sourced foods continued to record notable year-on-year price increases in July 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 remain stable 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. Although live goat prices remained at high levels, recent market activity has slowed. Mutton prices remained unchanged month-on-month but were still 67.9 percent higher than a year earlier, remaining at record highs. Beef prices increased by 2.0 percent month-on-month and 20.4 percent year-on-year.

Chicken prices increased by 7.5 percent month-on-month and 25.0 percent year-on-year, as higher feed costs and limited supplies of large-sized chickens contributed to higher live broiler farm-gate prices. Similar production pressures are affecting layer farms, where higher feed and vaccine costs and recent disease outbreaks have reduced egg production. Consequently, egg prices increased by 16.6 percent month-on-month and 33.2 percent year-on-year.

Fish prices remained above year-earlier levels, with carp and rohu prices increasing by 16.9 percent and 12.9 percent year-on-year, respectively. Month-on-month movements were mixed, with carp prices declining by 1.4

[1]Yangon Region Chamber of Commerce and Industry

percent while rohu prices remained unchanged. The resumption of fishing activities in mid-June and increased catches have improved the supply of fresh fish, contributing to lower prices for some fish products.

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

Commodity	Jul-26 Current	Jul-25 Last Year		Jun-26 Last Month	
- Eggs (piece)	554	416	33.2%	475	16.6%
Meat					
- Chicken	14,073	11,256	25.0%	13,095	7.5%
- Beef	19,308	16,039	20.4%	18,936	2.0%
- Pork	20,042	19,180	4.5%	20,042	0.0%
- Mutton	33,705	20,073	67.9%	33,705	0.0%
Fish					
- Carp	16,429	14,048	16.9%	16,667	-1.4%
- Rohu	11,497	10,186	12.9%	11,497	0.0%

Source: Department of Consumer Affairs

Looking Forward

Key developments to monitor in upcoming months include:

- **International rice price developments**: International rice prices remained stable in July 2026, with the FAO All Rice Price Index virtually unchanged, crop output prices have changed **relatively little** over the same period month-on-month, while prices were 4.7 percent higher than a year earlier. 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.
- **Impact of agricultural investments:** Several public initiatives have been launched to stimulate agricultural performance in the country: (1) More than 455 billion kyats in allocations from the State Economic Promotion Fund have reportedly been announced to support agriculture, livestock, and agricultural mechanization. The reported allocations include 372 billion kyats for agriculture, 51 billion kyats for livestock breeding, and 30 billion kyats for mechanized agriculture, including the production of 123,000 hand-operated drum seeders. (2) The newly introduced 2026/27 Monsoon Paddy Rice Export Zone Programme will cover more than 340,000 acres across Nay Pyi Taw, Bago, Yangon, and Ayeyarwady. Participating farmers will receive financial assistance of 750,000 kyats per acre. (3) The Bago Region Fisheries Department is targeting higher freshwater fish production in 2026/27, with the expansion intended to meet local consumption needs and generate a surplus for domestic markets and exports. The implementation and potential implications of these initiatives will be important to monitor.
- **Monsoon flood risks and impacts:** According to early warning estimates by UN OCHA, flooding has affected almost 400,000 people in Myanmar, with Sagaing among the worst-affected areas. Flooding also affected monsoon rice cultivation in Lemyethna Township in July 2026, with the Ayeyarwady Region Government reporting that more than 10,000 acres were affected.[2] Flood warnings were also issued for areas along the Bago and Sittaung rivers. Continued monitoring of flood conditions will be important given potential impacts on crop production, transport, and food supply chains.
- **El Niño impacts:** International meteorological forecasts suggest that El Niño conditions could strengthen considerably from August 2026 onward, potentially reaching very strong levels toward the end of the year. Although the phenomenon originates in the Pacific, it can have important consequences for Myanmar's agriculture, increasing the likelihood of erratic and below-normal rainfall, higher temperatures and prolonged periods of heat, as well as unusual storm activity and other extreme weather events.
- **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. These developments are particularly concerning for Myanmar's agrifood system,

[2] The affected area in Lemyethna was estimated to represent around 0.31 percent of Ayeyarwady Region's total monsoon rice area, suggesting a limited impact on overall regional rice production.

which depends heavily on fuel for transportation, irrigation, mechanization, and processing. Some farmers report cultivating smaller areas or reducing the number of plowings because of higher fuel costs. Fertilizer prices are also substantially above last year's levels. The reference price for a bag of urea, set at 120,000 MMK, 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 substantially lower application rates and, consequently, reduced agricultural production.

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INTERNATIONAL FOOD POLICY RESEARCH INSTITUTE
1201 Eye St, NW | Washington, DC 20005 USA
T. +1-202-862-5600 | F. +1-202-862-5606 | ifpri@cgiar.org | www.ifpri.org | www.ifpri.info

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