MYANMAR

IFPRI

STRATEGY SUPPORT PROGRAM | WORKING PAPER 79 MAY 2026

Farm Commercialization and Farm Services

Myanmar Agricultural Performance Survey (Monsoon 2025)

Hnin Ei Win and Bart Minten

Livelihoods and Food Security Fund

LIFT

managed by UNOPS

Australian Aid

CONTENTS

TABLES

FIGURES

ABSTRACT

This Working Paper presents findings from an assessment of farm commercialization and farm services during the 2025 monsoon. The analysis is based on data from the Myanmar Agriculture Performance Survey (MAPS), a phone-based survey conducted with 4,553 crop farmers across all states/regions of the country during Q1 of 2026. Our findings reveal the following:

- Insecurity continues to affect farming, as reflected in the substantial share of farmers who feel unsafe and report being unable to move freely to buy inputs or sell outputs without serious concerns for their safety. Twenty-three percent of farmers reported feeling “very insecure” or “insecure” during the survey period. Additionally, 7 percent reported that some agricultural fields in their area could not be cultivated due to conflict. Furthermore, 9 percent of farmers expressed fear of storing produce at home because of the risk of confiscation or destruction.
- Despite challenges related to fuel and mobility, agricultural inputs were largely available during the monsoon, reflecting the resilience of the private sector in supplying these goods even under difficult conditions. However, labor scarcity is becoming more pronounced, seemingly linked to migration and insecurity. Input prices continued to rise, with fertilizer prices increasing by 24 percent compared to two years earlier. Other input costs, including mechanization and wages, increased even more.
- On the output side, prices for paddy—grown by 64 percent of all farmers during the monsoon—fell over the last two years, leading to reduced investments and lower agricultural productivity. Other crops linked to export markets also experienced price declines or only moderate increases over the same period, including pigeon pea (-18 percent) and maize (+28 percent), compared to much larger increases for more domestically consumed crops such as tomato (+178 percent), betel nut (+75 percent), and betel leaves (+43 percent).
- Most farmers reported either stabilization or worsening of agricultural sales income compared to the previous monsoon. Thirty-nine percent of farmers reported lower incomes in the 2025 monsoon season than in the previous monsoon, with 22 percent experiencing declines of more than 20 percent. Only 30 percent reported an increase in sales income.
- The use of agricultural credit during the 2025 monsoon continued its decline, falling from 47 percent of farmers in 2021 to 38 percent in 2025—a decrease of 9 percentage points. This decline occurred across all agro-ecological zones except the Delta. Access to agricultural extension services remained at levels similar to previous years, with 35 percent of farmers accessing some type of extension service.
- Security challenges continue to hinder crop commercialization in Myanmar. Conditions vary across states and regions, with the Delta—the country’s rice bowl—experiencing relatively better security conditions. Farmers in conflict-affected areas face greater obstacles to commercialization, including reduced availability of agricultural inputs.

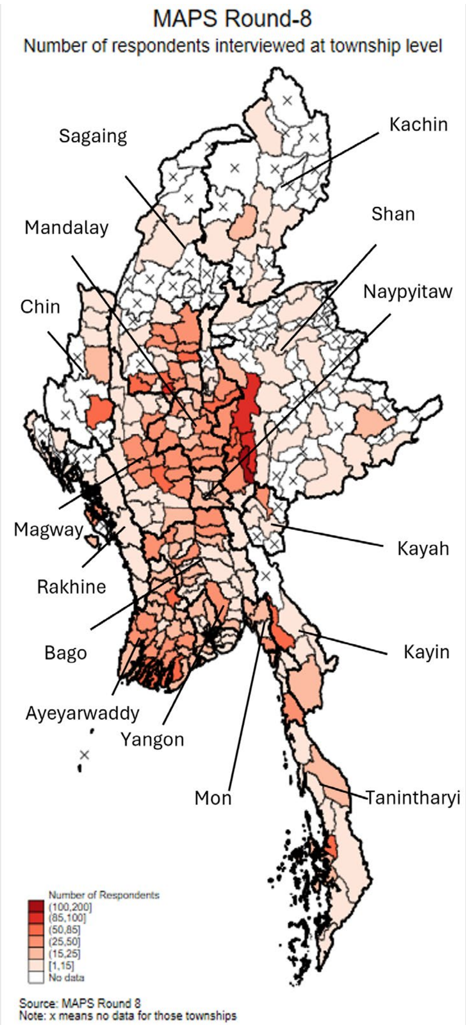
1. INTRODUCTION

This Working Paper presents findings from an assessment of farm commercialization and farm services during the 2025 monsoon. The analysis is based on data from the Myanmar Agriculture Performance Survey (MAPS), a phone-based survey conducted with 4,553 crop farmers across all states/regions of the country during Q1 of 2026. The paper examines crop farmers' perceptions of the security situation, their use of farm services, the availability and prices of agricultural inputs, farm-level prices of major crops, changes in income from crop sales, and broader challenges in crop marketing.

2. DATA AND METHOD

The MAPS sample is drawn from households interviewed during the ninth round of the Myanmar Household Welfare Survey (MHWS), conducted in the beginning of 2026. The MHWS collected information on household background, welfare indicators, and livelihoods, while MAPS focused specifically on the agricultural activities of crop farmers during the 2025 monsoon. MAPS was implemented from January 30 to March 19, 2026. The number of crop farmers interviewed in MAPS is reported by state and region, agro-ecological zone, and township in Figure 1. It should be noted that sample sizes are relatively small in Kachin, Kayah, Chin, and Rakhine.

Figure 1. Sample of crop farmers, MAPS monsoon 2025



State/Region	Sample	Agro-ecological Zone	Sample
Kachin	54	Hills	1,008
Kayah	50	Dry	1,730
Kayin	108	Delta	1,391
Chin	91	Coastal	424
Sagaing	618	Total	4,553
Tanintharyi	153		
Bago	518		
Magway	499		
Mandalay	512		
Mon	171		
Rakhine	100		
Yangon	146		
Shan	705		
Ayeyarwady	727		
Nay Pyi Taw	101		
Total	4,553		

Source: Authors' calculations based on MAPS, monsoon 2025.

To ensure that crop farmers are representative of the crop farming population within their respective agro-ecological zones, a weighting factor was calculated using the methodology applied in the MHWS (see MAPSA 2022 for details). MAPS collected data on household characteristics, total cultivated area, crops grown, security challenges, input use and farm management practices, yields, sales, output prices, and marketing behavior. Table 1 provides background statistics on the surveyed farmers. For analysis, we divide the country into four major agro-ecological zones commonly used in Myanmar and present results at this level.[1] The previous monsoon MAPS was fielded in 2023, and we therefore compare practices in 2025 to that year.

Table 1. Descriptive crop farmers, MAPS monsoon 2025

	Unit	National	Hills	Dry	Delta	Coastal
Total number of farmers	Number	4,220	902	1,632	1,300	386
Area cultivated - acres	Mean	5.7	5.2	5.0	6.9	5.9
Area cultivated - acres	Median	4.0	3.5	3.5	5.0	4.0
Crops grown in monsoon 2025						
Rice	% of farmers	64.2	59.8	58.0	79.7	54.1
Groundnut	% of farmers	12.7	8.5	26.5	2.8	1.3
Sesame	% of farmers	10.8	2.1	25.2	3.9	0.0
Maize	% of farmers	9.6	35.7	0.8	0.5	0.0
Betel Leaves	% of farmers	4.7	0.5	6.3	6.9	3.1
Betel Nut	% of farmers	3.7	0.7	0.2	4.3	22.9
Banana	% of farmers	4.0	2.0	2.9	5.7	7.9
Tomato	% of farmers	3.0	6.9	2.5	0.6	1.5
Rubber	% of farmers	2.3	3.6	0.0	0.3	13.3
Pigeon pea	% of farmers	7.5	1.8	18.8	0.7	0.0

*: 4,553 farmers were interviewed but 7 percent of these farmers did not cultivate crops during the monsoon season of 2025. The final number of observations is therefore slightly smaller than the number contacted and reported in Table 1.
Source: Authors' calculations based on MAPS, monsoon season 2025.

During the 2025 monsoon, 4,220 of the contacted farmers reported cultivating crops. The average cultivated area was 5.7 acres (median: 4.0 acres). Nationwide, 64 percent of crop farmers grew paddy, with the share rising to 80 percent in the Delta region. Other important monsoon crops included groundnuts (13 percent), sesame (11 percent), and maize (10 percent). Sesame, groundnut, and pigeon pea were particularly significant in the Dry Zone, where 26, 25, and 19 percent of farmers grew these crops, respectively. In addition to paddy and pulses, cultivation of betel leaves was important in the Delta (7 percent) and the Dry Zone (6 percent). In Coastal areas, 23 percent of farmers cultivated betel nut (areca nut). In the Coastal zone, 13 percent of farmers also cultivated rubber.

3. INSECURITY AND AGRICULTURE

Farmers were asked about their perceptions of insecurity in their area of residence. This question was posed in Q1 of 2026 to crop farmers who cultivated during the monsoon, as well as in previous MAPS monsoon rounds. At the national level, perceptions of security by farmers have improved slightly over the past two years. However, it is important to note that the sample of farmers from the

[1] Delta (Ayeyarwady, Bago, Yangon); Coastal (Rakhine, Tanintharyi, Mon); Central Dry (Mandalay, Magway, Nay Pyi Taw, Sagaing); Hills and Mountains (Chin, Kachin, Kayah, Kayin, Shan).

most insecure areas—such as Rakhine, Kayah, Chin, and Kachin—was small, leading to underrepresentation of these regions. While 82 percent of farmers reported living in a "secure" or "very secure" situation at the beginning of 2022, this share declined to 77 percent four years later. Nevertheless, this represents an improvement compared to two years ago, when only 68 percent reported residing in secure areas (Table 2). The proportion of farmers reporting insecure conditions was highest in the Dry Zone (29 percent) and Coastal areas (28 percent).

Table 2. Perceptions of insecurity in the area that the farmer resides in, share of farmers

	Unit	National	Hills	Dry Zone	Delta	Coastal
December 2021 - February 2022						
Very insecure	%	3.7	4.8	3.5	2.1	6.6
Somewhat insecure	%	14.2	19.2	11.9	11.3	20.4
Secure	%	43.0	47.4	38.3	46.6	36.1
Very secure	%	38.5	28.1	45.6	40.0	34.9
Prefer not to answer	%	0.6	0.6	0.8	0.0	2.0
Total	%	100.0	100.0	100.0	100.0	100.0
January - March 2024						
very insecure	%	9.9	14.6	9.7	3.8	15.0
somewhat insecure	%	22.1	24.7	24.0	15.0	28.0
secure	%	34.6	36.0	33.9	35.5	31.2
very secure	%	32.9	24.2	32.1	45.6	23.7
prefer not to answer	%	0.6	0.6	0.4	0.2	2.1
Total	%	100.0	100.0	100.0	100.0	100.0
January - March 2026						
very insecure	%	7.2	5.4	8.8	3.7	15.8
somewhat insecure	%	15.6	13.2	20.4	12.8	12.4
secure	%	38.4	41.6	37.5	36.0	40.2
very secure	%	38.6	39.8	33.0	47.4	31.1
prefer not to answer	%	0.2	0.0	0.4	0.0	0.6
Total	%	100.0	100.0	100.0	100.0	100.0

Source: Authors' calculations based on MHWS, round 1 and MAPS, rounds 5 and 8.

Feelings of insecurity can significantly affect farm activities, as farmers may avoid traveling to purchase inputs, sell outputs, or even cultivate land altogether. At the time of the survey, 17 percent of farmers reported that they could not move around without serious security concerns (Table 3). Mobility concerns were highest in the Coastal areas and the Dry Zone. Farmers were also asked whether fields in their community were left uncultivated, burned or destroyed, or not harvested due to conflict. Nationally, 7 percent and 4 percent of farmers, respectively, indicated these issues occurred in their area—both at similar levels as two years earlier. Not cultivating land due to conflict was most frequently reported in Coastal areas (13 percent). Land confiscation was mentioned by 2 percent of farmers, with the problem most prevalent in Coastal areas (5 percent). Finally, 9 percent of farmers nationwide reported being afraid to store agricultural produce at home due to the risk of confiscation or destruction, with this concern particularly high in the Dry Zone (16 percent).

Table 3. Insecurity, mobility and agriculture, share of farmers

	Unit	National	Hills	Dry Zone	Delta	Coastal
Cannot move around without serious concern for security						
March 2022	%	20.3	22.0	23.4	16.6	15.6
January – March 2024	%	22.8	26.5	23.0	12.9	39.7
January – March 2026	%	17.0	11.1	20.9	13.1	28.7
Crops or fields were burnt or destroyed or not harvested because of conflict in the farmers' area						
August – September 2022	%	3.6	2.2	6.5	0.8	5.2
January – March 2024	%	4.2	6.4	4.5	0.8	7.0
January – March 2026	%	4.4	4.1	6.1	1.5	7.4
Fields were not cultivated in my area because of conflict						
August – September 2022	%	7.8	8.7	10.8	1.3	15.3
January – March 2024	%	7.8	8.9	10.2	1.1	14.2
January – March 2026	%	7.4	7.8	9.5	2.2	13.3
Agricultural land was confiscated in this community						
January – March 2026	%	1.7	2.0	1.4	0.5	5.2
Farmer is afraid of storing agricultural produce at his house because of risk of confiscation/destruction						
January – March 2026	%	8.9	4.3	15.9	2.7	12.3

Source: Authors' calculations based on MAPS, rounds 1, 2, 5, and 8.

4. FARM SERVICES

Farmers were surveyed on two types of farm services: credit and extension. Table 4 highlights the use of farm credit, showing a notable decline in uptake—from 47 percent during the 2021 monsoon to 38 percent in 2025, a drop of 9 percentage points. For those who accessed credit, the Myanmar Agricultural Development Bank (MADB) remained the primary source, serving 14 percent of cultivating farmers in the 2025 monsoon. Other sources included input suppliers (10 percent) and relatives or friends (8 percent). Agricultural credit from microfinance institutions (MFIs) or NGOs was accessed by only 2 percent of farmers. Four percent of farmers obtained credit from a revolving fund (Mya Sein Yaung) and 3 percent relied on a private money lender.

Regional differences in credit usage were significant. In the Delta, 51 percent of farmers used credit during the 2025 monsoon, compared to just 28 percent in the Coastal areas. In the case of the Delta, we also observe stable patterns over time in the use of agricultural credit, in contrast to the other three agro-ecological zones. The Delta also had the highest proportion of farmers borrowing from MADB (24 percent), compared to 15 percent in Coastal areas, 11 percent in the Hills and 9 percent in the Dry Zone. In the Hills, revolving funds accounted for 9 percent of credit sources, much higher than in other zones.

Table 4. Use of credit

-	Unit	National	Hills	Dry Zone	Delta	Coastal
Farmer took credit						
Monsoon 2025	%	37.5	36.9	30.5	50.7	27.7
Monsoon 2023	%	42.6	45.8	32.5	53.5	41.1
Monsoon 2022	%	43.5	47.2	34.6	53.2	40.1
Monsoon 2021	%	46.7	49.9	41.4	49.9	48.0
If credit taken, sources						
Private money lender	%	3.1	3.0	2.9	3.5	3.0
Relatives/ Friend	%	8.4	6.3	9.3	10.1	5.1
MADB	%	14.5	11.0	9.5	23.8	15.1
Department of Cooperatives	%	0.4	0.5	0.4	0.2	0.1
Microfinance Institution/NGO	%	2.1	2.4	0.9	3.5	1.1
Rice or oil mill	%	0.4	0.6	0.0	0.9	0.0
Agricultural input suppliers	%	9.6	6.1	8.7	15.8	4.3
Agricultural trader (crops or crops + inputs)	%	2.3	5.4	1.0	1.8	0.5
Agricultural machinery suppliers	%	0.1	0.0	0.1	0.1	0.1
Private bank	%	0.4	0.3	0.7	0.2	0.0
Revolving fund (Mya Sein Yaung)	%	3.6	9.1	1.3	2.5	1.3
Other	%	1.1	1.0	1.1	1.6	0.2

Source: Authors' calculations based on MAPS, monsoon season 2025.

Table 5. Use of extension services

	Unit	National	Hills	Dry Zone	Delta	Coastal
Farmer used any extension service						
Monsoon 2025	%	34.7	35.6	30.4	41.4	29.1
Monsoon 2023	%	34.9	29.0	30.6	46.0	34.7
Monsoon 2022	%	32.4	32.7	31.5	32.7	33.6
Monsoon 2021	%	34.7	30.9	36.0	34.7	39.6
Extension service used						
Public extension	%	10.8	12.3	9.5	11.2	10.8
If received, share in-person	%	82.0	75.3	78.2	90.6	88.2
If received, share digital	%	9.3	7.5	12.9	7.1	8.9
If received, share both	%	8.8	17.2	8.9	2.2	2.9
Private extension	%	17.4	16.7	17.0	22.3	7.0
If received, share in-person	%	89.6	86.3	87.5	93.1	96.1
If received, share digital	%	4.2	5.6	4.6	2.9	3.9
If received, share both	%	6.2	8.1	7.8	4.1	0.0
NGO	%	6.6	8.7	5.7	5.4	8.0
If received, share in-person	%	82.2	78.2	83.6	82.5	89.5
If received, share digital	%	11.3	13.2	10.5	10.3	9.6
If received, share both	%	6.5	8.6	5.9	7.2	0.9
Any cellphone application and internet	%	17.1	16.4	14.5	22.7	12.8

Source: Authors' calculations based on MAPS, monsoon season 2025.

Table 5 presents data on the use of agricultural extension and crop advisory services over the past four monsoons. After a decline of 3 percentage points—from 35 percent of farmers in 2021 to 32 percent in 2022—usage rebounded to 35 percent in the 2023 and 2025 monsoon. Among those accessing extension services, the private sector was the main provider, serving 17 percent of farmers, followed by the public sector (11 percent) and NGOs (7 percent). Consistent with earlier findings (MAPSA 2024), digital agricultural extension services remain important, despite the internet problems in the country. In 2025, 17 percent of farmers reported using digital extension. Regionally, the Delta recorded the highest use of extension services overall (41 percent), compared to 30 percent in the Dry Zone and 29 percent in the Coastal areas. Adoption of digital extension was strongest in the Delta, where 23 percent of farmers utilized these services.

5. AGRICULTURAL INPUT AVAILABILITY AND PRICES

We next examine the extent to which farmers faced problems related to the availability of agricultural inputs during the monsoon, comparing 2023 and 2025. Farmers were asked whether they were unable to find any or enough of several key inputs. In the most recent monsoon, no major availability issues were reported nationally; in most parts of the country, agricultural inputs were readily available—and at similar levels as in 2023. This suggests strong private sector resilience in supplying most inputs (Table 6).

At the national level, only 3 percent of farmers reported shortages of chemical fertilizers, similar to 2023. Problems with pesticides were even less common. Labor availability, however, remained a challenge: 20 percent of farmers reported difficulty finding enough laborers, 3 percentage points higher than in 2023. Labor shortages were most pronounced in the Delta. Fertilizer shortages were more severe in Coastal areas, the Dry Zone, and the Hills than in the Delta.

Table 6. Reported problems of availability of agricultural inputs (not available or not enough available) – Monsoon 2023 and 2025

	Unit	National	Hills	Dry Zone	Delta	Coastal
Monsoon 2023						
Chemical fertilizer	%	3.4	3.4	4.0	2.2	4.7
Seeds	%	2.5	4.0	2.1	1.7	2.5
Pesticides	%	1.6	1.4	1.1	1.4	4.2
Mechanization	%	5.3	4.6	5.0	6.1	6.2
Labor	%	17.1	16.7	15.8	18.0	20.3
Monsoon 2025						
Chemical fertilizer	%	3.1	5.2	2.9	1.5	3.3
Seeds	%	3.5	7.1	2.5	2.2	1.3
Pesticides	%	1.7	3.0	1.2	1.0	1.7
Mechanization	%	3.8	4.1	3.7	3.6	3.6
Labor	%	19.6	18.1	17.8	23.8	18.5

Source: Authors' calculations based on MAPS, monsoon season 2023 and 2025.

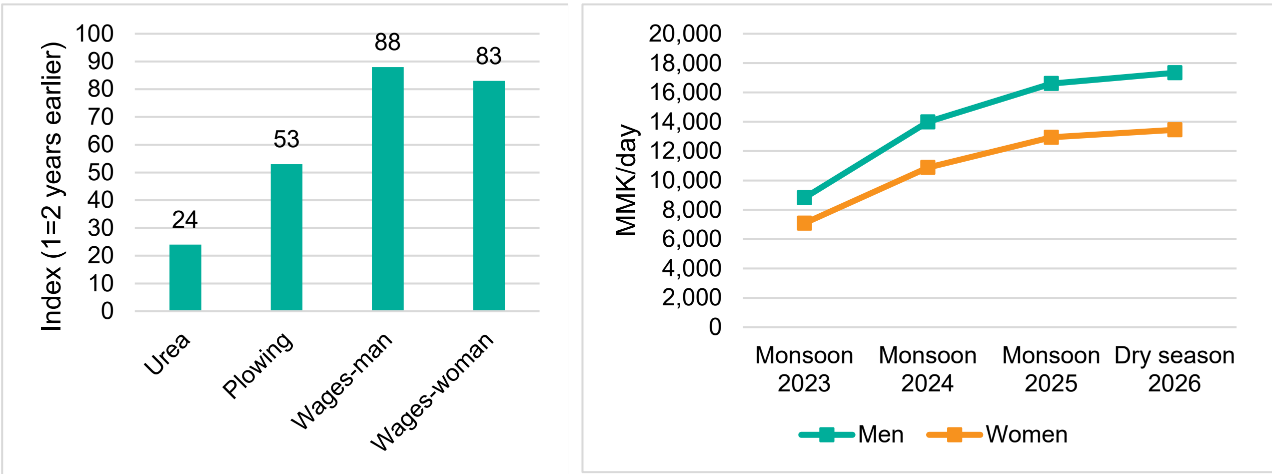
Farmers were asked about changes in agricultural input prices over the past two years, comparing monsoon periods. Substantial increases in input costs were observed during monsoon cultivation. Urea—the most widely used fertilizer in the country—rose by 24 percent (Figure 2, left). Mechanized plowing charges also increased, with costs for plowing by four-wheel tractors up by 53 percent.

Wages for casual laborers surged significantly, rising by 88 percent for men and 83 percent for women (in nominal terms) during the monsoon. Changes in agricultural wages since the monsoon 2024 have been smaller (19 percent increase between the 2024 and 2025 monsoon versus 59 percent between 2023 and 2024) (Figure 2, right), possibly reflecting the recent lower inflationary environment (World Bank 2025). This slower increase persisted between the monsoon season of 2025 and the dry season of 2026.

Figure 2. Price changes of agricultural inputs

Prices changes in the monsoon of 2025 (price two years earlier = 1)

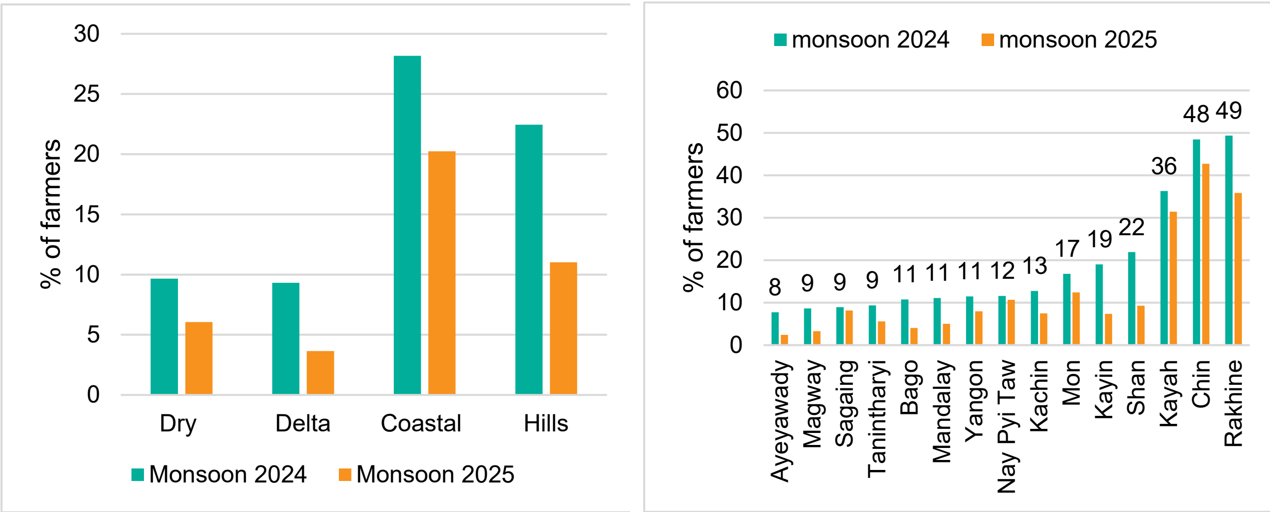
Agricultural casual wages, Monsoon 2023 – Dry Season (Q1) 2026



Source: Authors' calculations based on MAPS, monsoon season 2023 and 2025 (monsoon season 2024 data are recall data).

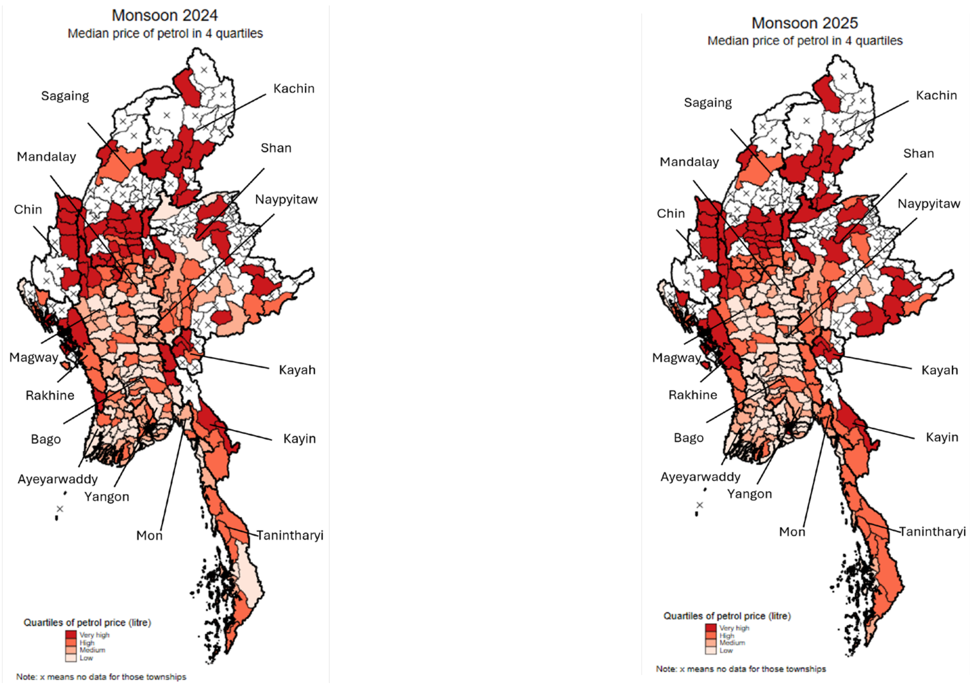
At the national level, 8 percent of farmers reported that fuel was unavailable or rarely available in their community during the 2025 monsoon, compared to 15 percent during the 2024 monsoon. This lack of fuel complicated mechanization, irrigation, and other farming activities for affected farmers. However, the situation in 2025 was significantly better than during the 2024 monsoon (Figure 3). There is considerable variation in both fuel availability and fuel prices across the country (Figure 3 and Figure 4). High fuel prices and shortages are particularly severe in conflict-affected and remote areas. During the monsoon season, prices were especially high in Rakhine, Chin, Kachin, and Kayin.

Figure 3. Share of farmers reporting that fuel was rarely or not available in their community, monsoon 2024 and monsoon 2025



Source: Authors' calculations based on MAPS, monsoon 2025.

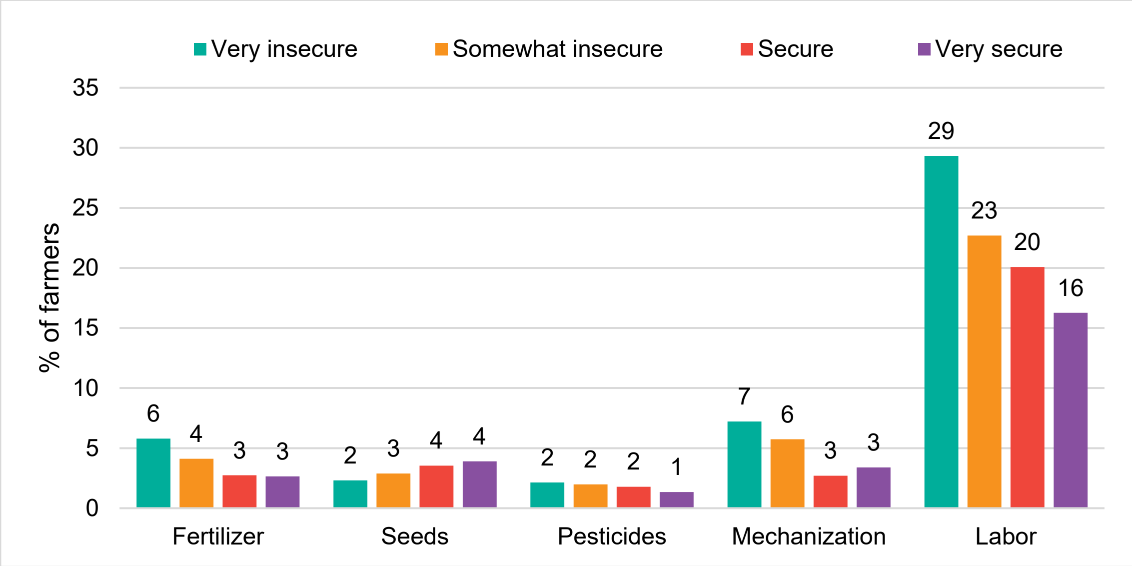
Figure 4. Fuel prices in the monsoon season of 2024 and 2025



Source: Authors' calculations based on MAPS, monsoon season 2025.

We assess the extent to which input availability is linked to insecurity. On average, shortages were significantly more severe in insecure areas. For example, 6 percent of farmers in "very insecure" areas reported lacking access to chemical fertilizer, compared to only 3 percent in the most secure areas (Figure 5). The largest differences across insecurity categories were observed for labor: 29 percent of farmers in very insecure areas reported labor shortages, versus 16 percent in very secure areas. As laborers become increasingly unwilling to work in insecure areas—often demanding higher wages and compensation for added risk—these shortages are likely to have a significant impact on agricultural productivity.

Figure 5. Availability of agricultural inputs and perceived insecurity, monsoon 2025



Source: Authors' calculations based on MAPS, monsoon season 2025.

6. CROP PRICES

The survey also collected information on farmgate prices at the time of data collection and compared them with prices recorded two years earlier. Table 7 shows that average paddy prices fell by 6 percent, while median prices declined by 9 percent. This drop in rice prices appears linked to international trends—FAO's international rice price index fell by 24 percent between February 2024 and February 2026—as well as to a more stable exchange rate for the Kyat (the MMK/USD online rate was 14 percent higher in February 2026 compared to February 2024). Other crops linked to export markets also showed decreases or moderate increases, including pigeon pea (-18 percent) and maize (+28 percent), compared to more domestically consumed crops, such as tomato (+178 percent), betel nut (+75 percent) and betel leaves (+43 percent). Oilseeds show changes in between (sesame, +31 percent; groundnut, +28 percent).

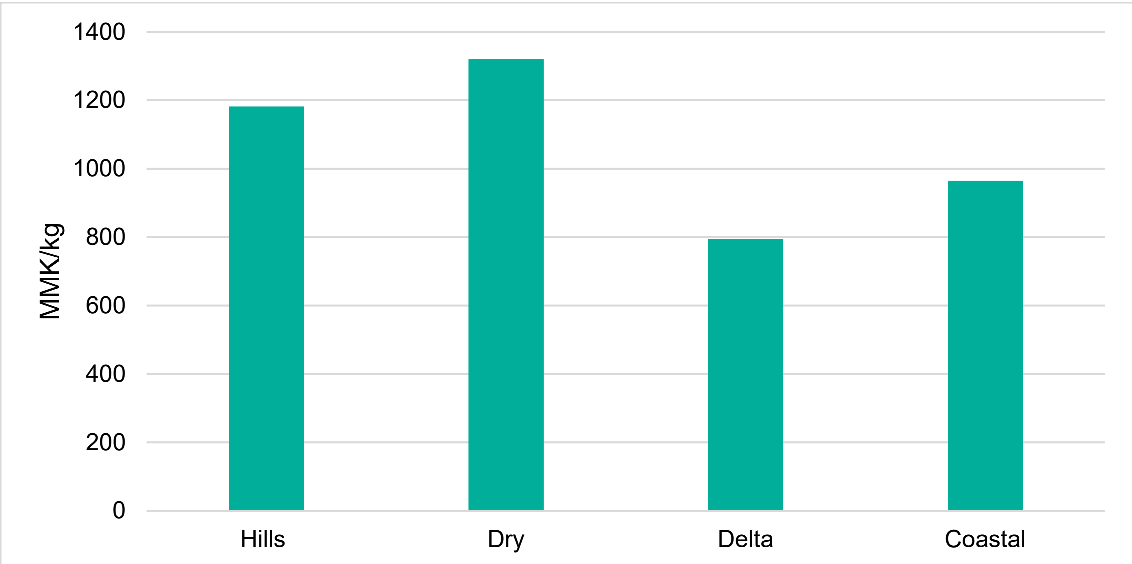
Figure 6 illustrates the wide variation in paddy prices across the country. Average prices at the sub-national level range from 795 MMK/kg in the Delta to 1,320 MMK/kg in the Dry Zone— a difference of 66 percent. These large differences appear to be driven by high transportation costs and severe mobility constraints. It is worth noting that paddy prices in the Delta – the rice bowl of the country – have historically been significantly lower than in other regions (Minten et al., 2023).

Table 7. Prices for main crops, Jan/March 2026 compared to two years earlier (MMK/kg)

	Unit	2026	2024	% change
Paddy	Mean	1,063	1,127	-5.7
	Median	957	1,053	-9.1
Groundnut	Mean	3,220	2,519	27.8
	Median	3,333	2,632	26.7
Sesame	Mean	5,640	4,310	30.8
	Median	4,490	4,204	6.8
Maize	Mean	778	607	28.0
	Median	755	564	33.7
Betel Leaves	Mean	11,876	8,285	43.3
	Median	9,816	6,135	60.0
Betel Nut	Mean	9,811	5,602	75.1
	Median	8,282	4,969	66.7
Tomato	Mean	1,769	636	178.3
	Median	1,534	613	150.0
Rubber	Mean	4,553	2,966	53.5
	Median	4,400	3,067	43.4
Pigeon pea	Mean	2,886	3,537	-18.4
	Median	2,936	3,609	-18.6

Source: Authors' calculations based on MAPS, round 5 and 8.

Figure 6. Paddy prices as reported by farmers, monsoon 2025



Source: Authors' calculations based on MAPS, round 8.

7. CROP MARKETING AND CHALLENGES

Table 8 summarizes the share of farmers who attempted to sell crops during the monsoons of 2023 and 2025, the main crops they intended to sell, and the marketing challenges they faced. Most farmers sold or tried to sell monsoon crops, and the proportion was slightly higher in 2025 (86 percent) compared to 2023 (82 percent). Paddy rice remained the top crop for sale, reported by 42 percent of farmers in 2025, 6 percentage points lower than in 2023, possibly because of the lower sales prices. Other key crops included maize (8 percent) and pigeon pea (3 percent), and oilseeds—primarily groundnut (6 percent) and sesame (4 percent).

Table 8. Sales of monsoon crops and challenges, share of farmers

		2023	2025				
	Unit	National	National	Hills	Dry	Delta	Coastal
Tried to sell crop of monsoon harvest	% yes	81.7	85.5	81.5	83.8	93.6	78.9
Main crop that they tried to sell							
Rice	%	47.6	41.6	17.1	37.5	68.2	33.1
Groundnut	%	4.5	6.0	0.4	15.2	1.4	0.8
Sesame	%	3.6	4.0	0.2	10.2	1.0	0.0
Maize	%	7.1	8.2	32.5	0.5	0.4	0.0
Betel Leaves	%	3.2	4.6	0.4	6.6	6.1	3.2
Betel Nut	%	0.8	1.6	0.1	0.2	1.0	13.4
Banana	%	1.6	1.9	0.9	1.6	2.2	4.8
Tomato	%	1.3	2.1	6.0	1.4	0.2	0.7
Rubber	%	0.8	1.5	2.7	0.0	0.0	9.5
Pigeon pea	%	4.5	2.8	0.1	7.6	0.1	0.0
Other crops	%	24.9	25.6	39.7	19.2	19.4	34.5
All crops	%	100.0	100.0	100.0	100.0	100.0	100.0
Challenges faced during marketing	% yes	10.6	17.1	17.5	16.9	17.0	17.6
Type of challenge							
Low prices for crops	% yes	7.0	14.1	14.8	12.8	14.9	14.2
High price of fuel / high transportation cost	% yes	5.9	6.9	7.8	7.1	5.9	7.0
Payment problems	% yes	2.1	2.6	3.0	2.5	2.2	3.2
Have to sell crops on credit	% yes	2.2	4.9	6.1	3.9	5.0	5.4
Markets are closed	% yes	2.3	3.4	2.8	3.2	3.8	4.8
Not many traders	% yes	5.2	8.5	7.2	8.9	7.4	14.0
Buyers or traders cannot reach the farm, or I cannot reach them	% yes	5.9	7.0	6.6	8.1	5.7	8.3
Insecurity during travel	% yes	5.0	4.8	4.2	6.9	2.7	4.9

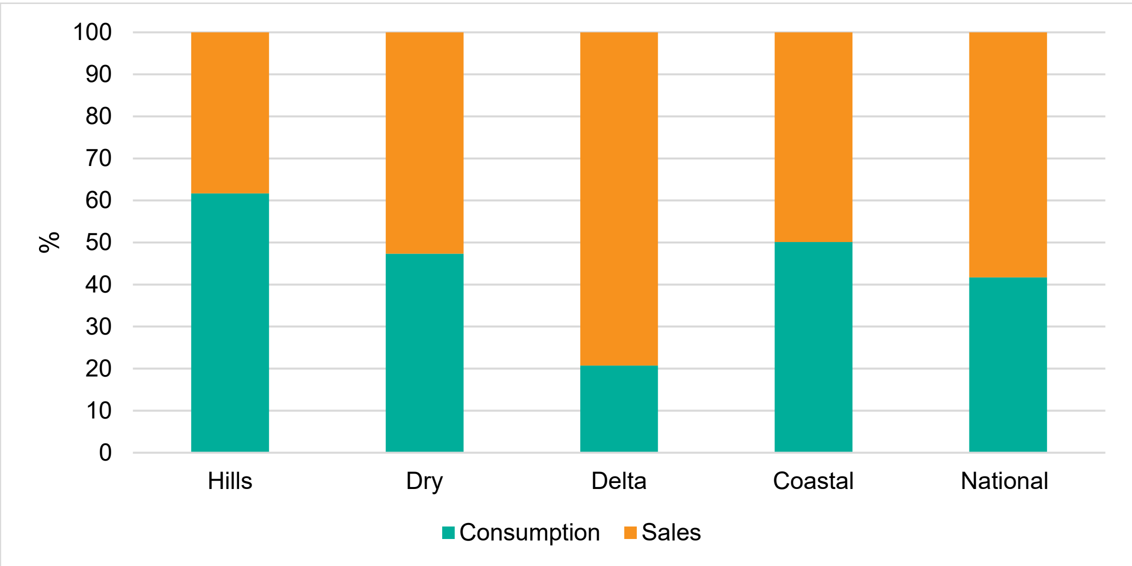
Source: Authors' calculations based on MAPS, monsoon season, 2023 and 2025.

There is considerable variation across agro-ecological zones. Rice dominated in the Delta (68 percent of farmers) but was far less important in the Hills (17 percent, despite 60 percent of the farmers growing rice). Maize is a very important cash crop in the Hills and is reported to be sold by 32 percent of farmers. In the Dry Zone, paddy (38 percent), groundnut (15 percent) and sesame (10 percent), and pigeon pea (8 percent) were most prominent, while in the Coastal region, betel nut (13 percent) and rubber (10 percent) were key sales crops, on top of paddy (33 percent).

Marketing challenges increased in 2025: 17 percent of farmers reported difficulties, up from 11 percent in 2023. Among those reporting challenges, low crop prices were cited by 14 percent—significantly higher than in 2023 when 7 percent reported those. High fuel and transport costs were another major constraint, mentioned by 7 percent of farmers compared to 6 percent two years ago. Issues such as lack of traders, market closures, and limited access to traders also became more prevalent than in 2023. Lack of traders and limited access to traders was mentioned particularly in Coastal areas (by 14 percent and 8 percent of the farmers respectively).

In the case of paddy price (the most important crop grown), farmers were asked what share of production they sold and what share they kept for own consumption. Figure 7 shows the results by agro-ecological zone. An average paddy farmer in Myanmar sells 58 percent of his harvest and keeps 42 percent for own consumption. There are significant differences across agro-ecological zones with farmers in the Delta only retaining 21 percent and selling 79 percent. In contrast, the share auto-consumed is 62 percent in the Hills.

Figure 7. Paddy prices as reported by farmers, monsoon 2025



Source: Authors' calculations based on MAPS, round 8.

Farmers were asked to estimate their overall sales income from crop farming compared to the same time a year earlier (Table 9). Most farmers indicated overall stabilization or worsening of agricultural sales income. Thirty-nine percent of farmers reported lower incomes in the 2025 monsoon season compared to the previous monsoon (2024), with 22 percent experiencing declines of more than 20 percent. Only 30 percent reported an increase in sales income. There was considerable regional variation: 49 percent of farmers in the Delta reported lower sales incomes, compared to just 30 percent in Coastal areas. This disparity reflects crop price trends—rice, which dominates sales incomes in the Delta, saw price declines, while Coastal farmers benefited from large price increases for betel nut and rubber, crops that are relatively important in that zone.

Table 9. Stated evolution of sales income from crop farming, monsoon 2025 compared to the 2024 monsoon, share of farmers

	Unit	National	Hills	Dry	Delta	Coastal
Much lower now (by 20% or more)	%	22.2	18.5	20.4	28.9	17.0
Somehow lower now (between 1% and 20% lower)	%	17.1	15.1	16.8	20.2	13.3
About the same now	%	31.1	35.3	29.8	28.7	32.9
Somehow higher now (between 1% and 20% higher)	%	20.5	22.0	22.2	15.1	28.4
Much higher now (by 20% or more)	%	9.0	9.1	10.8	7.1	8.4
Total		100.0	100.0	100.0	100.0	100.0

Source: Authors' calculations based on MAPS, monsoon season 2025.

8. CONCLUSIONS

Insecurity continues to affect farming, as shown by the substantial share of farmers feeling unsafe and reporting that they cannot move freely—to buy inputs or sell outputs—without serious concerns for their safety. Twenty-three percent of farmers reported feeling "very insecure" or "insecure" during the survey period, while 17 percent indicated they could not move around without serious concern. Additionally, 7 percent reported that some agricultural fields in their area could not be cultivated due to conflict. Land confiscation is also an important issue in rural areas, with 2 percent of farmers reporting it as a problem in their community, particularly in Coastal areas, where 5 percent of farmers reported this issue. Furthermore, 9 percent of farmers expressed fear of storing produce at home due to the risk of confiscation or destruction.

Despite challenges with fuel and mobility, agricultural inputs were largely available during the monsoon, reflecting the resilience of the private sector in supplying these goods even under difficult conditions. However, labor scarcity is becoming more pronounced, seemingly linked to migration and insecurity. Input prices continued to rise, with fertilizer prices increasing by 24 percent compared to two years earlier. Other input prices (mechanization, wages) increased even more. On the output side, prices for paddy (grown by 64 percent of all farmers in the monsoon) fell over the last two years, leading to reduced investments and lower agricultural productivity (MAPSA 2025).

The findings in this Working Paper suggest several key implications. First, declining crop prices and rising input costs are significantly reducing farm profitability, creating uncertainty for the supply of a number of crops in 2026. Ensuring appropriate prices and stronger production incentives through a well-functioning exchange rate system is important. Second, labor shortages remain a major constraint, highlighting the need for a well-functioning mechanization sector to offset these challenges. Third, improved security is critical. Escalating insecurity is disrupting agricultural activities, reducing input availability, and undermining farm profitability and incomes in affected areas.

REFERENCES

MAPSA. 2022. Phone surveillance, from scratch. Novel sample design features of the nationally representative Myanmar Household Welfare Survey (MHWS). MAPSA Discussion Paper 16. Washington, DC: International Food Policy Research Institute.

MAPSA. 2024. Agricultural Service Delivery During Turmoil: The State of Agricultural Extension and Agricultural Advisory Services in Myanmar. MAPSA Working Paper 54. Washington, DC: International Food Policy Research Institute.

Minten, B., and Aung, Z.W. 2025. Rice Productivity and Profitability in Myanmar: Assessment of the 2025 Monsoon. Myanmar SSP Discussion Paper 78. Washington, DC: International Food Policy Research Institute.

Minten, B., Goeb, J., Win, K.Z., Zone, P.P. 2023. Agricultural value chains in a fragile state: The case of rice in Myanmar. World Development. July 2023. Vol. 167: 106244.

World Bank. 2025. Myanmar Economic Monitor: Surviving, not thriving. December 2025. Washington, DC: World Bank.

ABOUT THE AUTHORS

Hnin Ei Win is a Research Analyst at the International Food Policy Research Institute, based in Myanmar. **Bart Minten** is a Senior Research Fellow and Myanmar Program Leader at the International Food Policy Research Institute, based in Lao PDR.

ACKNOWLEDGEMENTS

This work was undertaken as part of the Myanmar Agrifood System and Food Security Monitoring project led by the International Food Policy Research Institute (IFPRI). Funding support for this study was provided by the Australian Government, the Livelihoods and Food Security Fund (LIFT) and the Local Assistance Myanmar Programme (LAMP). This publication has not gone through IFPRI's standard peer-review procedure. The opinions expressed here belong to the authors, and do not necessarily reflect those of IFPRI, CGIAR, LIFT, LAMP, or the Australian Government.

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

The Myanmar Strategy Support Program (Myanmar SSP) is managed by the International Food Policy Research Institute (IFPRI). The program is financially supported by the Australian Government, the Livelihoods and Food Security Fund, and the United Kingdom Government. This publication has been prepared as an output of Myanmar SSP. It has not been independently peer reviewed. Any opinions expressed here belong to the author(s) and do not necessarily reflect those of IFPRI, CGIAR, the Australian Government, LIFT, or the United Kingdom Government.

IFPRI is a CGIAR Research Center | A world free of hunger and malnutrition