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Livelihoods and Welfare

Findings from the ninth round of the Myanmar Household Welfare Survey (July – October 2025)

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ABSTRACT

The ninth round of the Myanmar Household Welfare Survey, a nationally and regionally representative phone survey, was implemented in July-October 2025 (Q2–Q3) with a recall period covering the previous 3 months. It follows eight earlier rounds of surveys that have been carried out since December 2021. This report documents recent livelihood and welfare dynamics over this survey period.

Overall, household welfare conditions remain highly fragile. In terms of income sources, own farming, farm wages, and non-farm businesses continue to be the most important livelihoods in rural areas, while non-farm businesses and non-farm salaried employment remain most important in urban areas. Non-farm wage and non-farm salaried employment each account for around 20 percent of households nationally.

Production-related constraints in rural areas such as weather, pests, and input costs have remained broadly similar to previous rounds, but a growing share of households reported low selling prices as their main challenge. Among crop farmers, low selling prices became the most frequently cited challenge in Q2–Q3 2025. Livestock producers faced fewer price-related pressures and were more affected by high input costs, while fishing households reported both access constraints, a quarter of fishers could not reach their ponds, and low selling prices. Non-farm businesses continued to report weak demand, with many households indicating that fewer customers are purchasing their products.

In urban areas, nominal daily income per adult equivalent increased by 27 percent between Q3-Q4 2024 and Q2-Q3 2025. With food price inflation effectively flat over the period, nominal gains translated almost fully into real income growth, resulting in a 26 percent increase in urban real income. This marks a clear turning point compared with earlier rounds in which inflation eroded purchasing power. Nevertheless, urban real incomes remained substantially below pre-crisis levels.

In rural areas, nominal income growth was far more modest, rising by just 3 percent in real terms between Q3-Q4 2024 and Q2-Q3 2025. Although agricultural wage rates increased significantly, falling prices for most crops compressed farm revenues. Given that a large share of rural households depended directly on agriculture and farm-linked non-farm businesses, lower commodity prices offset wage gains and limited overall income growth. As a result, rural real incomes remained more than 30 percent below Q2 2022 levels.

In Q2-Q3 2025, income poverty declined by 2 percentage points. This reduction was driven entirely by urban areas, where poverty fell by 6 percentage points, reflecting the strong rebound in urban real incomes. Rural poverty, by contrast, remained unchanged. The recovery was uneven across socioeconomic groups. Asset-rich households experienced the largest gains, while poverty among asset-poor households remained persistently high. Poverty rates increased among farmers, when compared to the entire year of 2024. Conflict-affected households also continued to face very high poverty rates, with no meaningful improvement. In contrast, households receiving remittances maintained substantially lower poverty rates than those without remittance income.

1. INTRODUCTION

In 2025, Myanmar continued to face acute economic and humanitarian strain. Prolonged armed conflict, a major earthquake in March 2025, persistent macroeconomic instability, and a highly constrained business environment have collectively suppressed economic activity and undermined livelihoods (World Bank 2025). As a result, humanitarian needs have reached record levels. An estimated 19.9 million people—including 6.9 million children—now require urgent assistance (OCHA 2025; UNICEF 2025). Despite these expanding needs, funding has remained insufficient. By November 2025, only around 15 percent of required humanitarian resources had been secured, placing essential operations for millions at risk (OCHA 2025). The March 2025 earthquake alone generated an estimated two million additional people in need of assistance.

These overlapping shocks—conflict, natural disaster, and economic contraction—have sharply disrupted livelihoods and household welfare. Rural communities, internally displaced populations, and other vulnerable groups face heightened exposure to poverty, food insecurity, and limited access to essential services, further compounding pre-existing structural fragilities.

This paper provides an overview of the livelihoods and welfare of households across Myanmar for the ninth round of the Myanmar Household Welfare Survey (MHWS), a nationally and sub-nationally representative phone survey (Lambrecht et al. 2023). Conducted between July and October 2025, the MHWS monitors household and individual welfare indicators such as wealth, livelihoods, food insecurity, diet quality, health shocks, and coping strategies. The analysis in this report is mainly descriptive, focusing on income and livelihoods, and income poverty. Most indicators have a recall period of either one or three months, therefore the data cover the time spanning from April to October 2025.

2. LIVELIHOODS

2.1. Livelihoods and sources of income

The income composition of the country plays a critically important role in determining how households are affected by price and wage changes, and consequently by poverty dynamics. We therefore present the share of households earning income from each source (left columns) alongside the share identifying each source as their primary livelihood (right columns), separately for rural (Table 1) and urban households (Table 2). A summary table at the national level can be found in Table A.1. **In both income participation and primary livelihood terms, own farming, agricultural wage labor, and non-farm businesses are the dominant livelihoods in rural areas, while non-farm businesses and non-farm salaried employment are most important in urban areas.**

While this has remained consistent over time, there have been some changes in the percentage of households earning income from each source. **Compared to Q2–Q3 2023, fewer rural households reported earning income from their own farms and from farm wage work in Q2–Q3 2025** (left columns of Table 1). Notably, the share of households earning farm income declined by 4.8 percentage points, while the share earning income from farm wages fell by 6.8 percentage points. There was also a significant, though smaller, decline in the number of rural households reporting wage farming or wage non-farm as their primary income-earning activity (right columns of Table 1). At the same time, the share of households earning income from, and identifying as their main source of income, a non-farm business or non-farm salaried job has increased.

Table 1. Percentage of rural households by income source and primary livelihood across survey rounds

	Receives Income from Source			Considers Source the Primary Livelihood		
	Round 6 Q2 – Q3 2023	Round 8 Q3 – Q4 2024	Round 9 Q2 – Q3 2025	Round 6 Q2 – Q3 2023	Round 8 Q3 – Q4 2024	Round 9 Q2 – Q3 2025
Own farming (%)	62.0 ***	56.8	57.2	39.0	38.9	39.9
Farm wage (%)	30.5 ***	24.7	23.7	16.3 ***	13.6	12.4
Non-farm wage (%)	18.8 ***	17.6 **	15.8	11.8 ***	11.6 **	10.1
Non-farm salary (%)	12.1 ***	13.6 ***	16.1	6.5 ***	7.5 **	8.6
Non-farm business (%)	28.9 **	29.2 *	31.1	18.5 **	18.8	20.3
Other sources (%)	24.9	21.9 *	23.6	7.9	38.9	39.9
- Land/property rentals (%)	3.4	3.1	3.1			
- Assistance/pensions (%)	7.5 *	6.9	6.6			
- Remittances (%)	16.9	14.5 **	16.1			
- No income sources (%)	0.5	1.2 **	0.6			

Note: Quarters correspond to the recall period in each survey round. Q2–Q3 2023 refers to June– October 2023; Q3–Q4 refers to July–December 2024; Q2-Q3 2025 refers to April– October 2025. Asterisks indicate statistically significant differences compared to round 9: *p < 0.10, ** p < 0.05, *** p < 0.01.
Source: Author's calculations based on MHWS data.

In urban areas, the livelihood trends are similar to those in rural areas, with fewer urban households also reporting income from agriculture and farm-wage work. Compared to Q3-Q4 2024, in Q2–Q3 2025 significantly more urban households report earning income from non-farm businesses and non-farm salary employment (left columns of Table 2). Specifically, the share of households earning income from non-farm businesses and non-farm salaried employment increased by 4.3 and 3.6 percentage points, respectively.

Table 2. Percentage of urban households by income source and primary livelihood across survey rounds

	Receives Income from Source			Considers Source the Primary Livelihood		
	Round 6 Q2 – Q3 2023	Round 8 Q3 – Q4 2024	Round 9 Q2 – Q3 2025	Round 6 Q2 – Q3 2023	Round 8 Q3 – Q4 2024	Round 9 Q2 – Q3 2025
Own farming (%)	11.6 ***	9.8 *	8.2	4.9	4.9	3.8
Farm wage (%)	5.5 **	4.2	4.1	3.1 **	2.6	2.0
Non-farm wage (%)	29.8 ***	26.1	26.3	20.2 **	18.8	17.7
Non-farm salary (%)	42.6 **	42.3 **	45.9	29.3	29.1	30.4
Non-farm business (%)	47.6 *	45.7 ***	50.0	35.8	36.2	37.7
Other sources (%)	24.4	22.8 **	25.7	6.8 **	8.4	8.3
Land/property rentals (%)	4.5	4.1	4.3			
Assistance/pensions (%)	12.5	10.7	11.9			
Remittances (%)	12.0	11.1 **	13.3			
No income sources (%)	1.7	1.7 **	0.7			

Note: Quarters correspond to the recall period in each survey round. Q2–Q3 2023 refers to June– October 2023; Q3–Q4 refers to July–December 2024; Q2-Q3 2025 refers to April– October 2025. Asterisks indicate statistically significant differences compared to round 9: *p < 0.10, ** p < 0.05, *** p < 0.01.
Source: Author's calculations based on MHWS data.

Non-farm businesses, from which 26.1 percent of households earn income, are an important source of income in both rural and urban areas. **In rural areas, 9.2 percent of households have a non-farm food business and 13.0 percent have non-farm non-food business, while in urban areas, 14.6 percent of households have a non-farm food business and 26.8 percent have a**

non-farm non-food business.[1] Food-related non-farm businesses are concentrated in a few key activities: fixed food vendors, the sale of prepared food and drinks, mobile food vendors, and betel nut kiosks. Table 3 reports the share of households that earn income from each type of non-farm business.

Table 3. Percentage of households who earn income from non-farm businesses, by job type

	National	Rural	Urban
Non-farm businesses	**26.1**	**20.3**	**37.7**
Non-farm food related businesses	**11.0**	**9.2**	**14.6**
Fixed food vendor	4.6	3.9	5.9
Prepared food/drink seller	3.5	2.3	5.8
Mobile food vendor	1.3	1.4	1.2
Betel nut kiosk/betel related business	1.2	0.9	1.7
Food trader/broker/wholesaler	0.3	0.3	0.3
Other food processing	0.3	0.3	0.2
Transport of agricultural and food products	0.1	0.1	0.2
Rice miller	0.1	0.1	0.1
Agricultural service provider	0.1	0.1	0.0
Food delivery business	0.1	0.0	0.1
Agricultural input supplier	0.0	0.0	0.0
Agricultural machinery dealer/repairer	0.0	0.0	0.1
Other food/crop related enterprises	0.0	0.1	0.0
Non-farm non-food related businesses	**17.6**	**13.0**	**26.8**
Transportation services	5.7	4.0	9.1
Tailor	2.2	1.9	3.0
Carpentry/construction services	1.7	1.2	2.7
Clothing shop	1.4	1.0	2.2
Middlemen/broker	1.4	0.7	2.6
Household accessories shop	1.0	0.8	1.5
Hair salon/ Beauty shops	1.0	0.9	1.1
Retail/sales	0.9	0.6	1.5

Note: Households can select multiple business types, so the percentages do not add to the totals in the bold summary rows. The number of non-farm businesses were underreported because they were only asked if non-farm business was the main source of income for the household.
Source: Author's calculations based on MHWS data.

Overall, 4.6 percent of households earn income from fixed food vending, making it the most common food-related non-farm activity in both rural and urban areas. Engagement in the sale of prepared food and drinks is higher in urban areas, where 5.8 percent of households participate, compared to 2.3 percent in rural areas. In contrast, mobile food vending is equally prevalent in rural and urban areas, with 1.3 percent of households in both rural and urban Myanmar earning income from this activity. Similarly, 1.2 percent of households operate betel nut kiosks.

Within the non-food category, transportation services represent the largest activity. **Across Myanmar, 4.0 percent of rural households and 9.1 percent of urban households earn income from operating transportation services**. Tailoring, carpentry and construction businesses, as well as clothing shops, are also common non-food income sources in both rural and urban areas, with a larger share in urban areas. Working as a middleman or broker is another important activity in urban areas, with 2.6 percent of households earning income from this source.

In Q2-Q3 2025, 19.2 percent of households reported engaging in non-farm wage employment. **Within this category, unskilled construction work is the dominant activity in both rural and**

[1] Households can have multiple types of non-farm businesses, which is why non-farm food and non-farm non-food do not add up to the non-farm business average.

urban areas, with 6.6 percent of rural households and 9.6 percent of urban households earning income from this source (Table 4). Carpentry is the second most important source of non-farm wage income, with a similar 2.2 percent of households in both rural and urban areas engaged in this activity. Transportation services rank third, particularly in urban areas, where 3.1 percent of households earn income from this sector, compared to 1.0 percent in rural areas. Employment in trade centers also accounts for a notable share of non-farm wage work in both rural and urban areas. By contrast, factory work, manufacturing, and food-sector activities represent a smaller share of non-farm wage employment overall and are more commonly reported under salaried employment.

Table 4. Percentage of households who earn income from non-farm wage work, by job type

	National	Rural	Urban
Non-farm wage	19.2	15.7	26.3
Unskilled workers at construction (e.g., Masons, etc.)	7.6	6.6	9.6
Carpenters	2.2	2.1	2.4
Transportation	1.7	1.0	3.1
Trader center, market, etc.	1.4	1.0	2.3
Household work and odd jobs	1.2	1.0	1.6
Factory	1.0	0.8	1.3
Hair salons/ Beauty shop	0.5	0.6	0.3
Grocery	0.5	0.5	0.7
Manufacturing	0.7	0.7	0.6
Restaurant/Tea shops/ Snacks/Drinks stall	0.5	0.3	0.9
Handicrafts	0.5	0.6	0.3
Tailors	0.5	0.3	0.8
Workers at mill (rice/oil/wood)	0.4	0.4	0.5
Other wage work	2.9	1.6	5.6

Note: Households can multi-select multiple non-farm wage jobs, so the percentages are larger than the average of non-farm wage.
Source: Authors' calculations based on MHWS round 9 data.

In Q2-Q3 2025, 26.0 percent of households reported earning income from non-farm salaried employment. This share is substantially higher in urban areas (45.9 percent) than in rural areas (16.1 percent) (Table 5). **Public sector employment accounts for 8.2 percent of households overall, with higher engagement in urban areas (11.8 percent) compared to rural areas (6.5 percent)**. More than half of the public sector employees work in education. Factory employment is reported by 4.4 percent of households overall, again more common in urban areas (6.7 percent) than rural areas (3.3 percent).

Salaried employment in the food sector also contributes to household income, particularly in urban areas. Households earn income from restaurants, tea shops, snack and drink stalls (2.5 percent urban; 0.6 percent rural), grocery shops (1.9 percent urban; 0.5 percent rural), and trader centers or markets (0.9 percent urban; 0.4 percent rural), indicating that food-related activities generate salaried jobs alongside self-employment. Beyond the food sector, the next most important salaried sources of household income in urban areas are engineering and construction (2.2 percent), IT services (2.3 percent), clothing shops (2.2 percent), banks and microfinance institutions (2.1 percent), and private or international hospitals and clinics (1.9 percent).

Table 5. Percentage of households who earn income from non-farm salary work, by job type

	National	Rural	Urban
Non-farm salary	26.0	16.1	45.9
Public sector employees	8.2	6.5	11.8
Factory	4.4	3.3	6.7
Restaurant/Tea shops/ Snacks/Drinks stall	1.2	0.6	2.5
Engineers/Constructions	1.1	0.6	2.2
Bank/Microfinance Institution (MFI)	1.0	0.5	2.1
Grocery	1.0	0.5	1.9
IT services	0.9	0.3	2.3
Clothing shop	1.0	0.3	2.2
Private/International/Government schools	1.0	0.6	1.8
Private/International hospital/Clinic	0.8	0.3	1.9
Retails and sales	0.8	0.3	1.6
Transportation	0.7	0.4	1.4
Construction shop	0.6	0.3	1.4
Tailors	0.6	0.4	1.0
Trader center, market etc.	0.6	0.4	0.9
Other non-farm salary work	6.8	3.0	14.3

Note: Households can multi-select multiple non-farm salary jobs, so the percentages are larger than the average of non-farm salary.
Source: Authors' calculations based on MHWS round 9.

2.2. Key challenges facing sectors

Workers across all sectors continue to face significant challenges, although some sectors have experienced modest improvements. Overall, about half of non-farm businesses still report difficulties in operating (Table A.2). In Q2–Q3 2025, fewer non-farm businesses cited high prices of raw materials or supplies (11.1 percent) and high fuel costs (3.6 percent) as major constraints compared to the two previous years (Table 6). **However, compared to Q3–Q4 2024, a larger share of households with non-farm businesses reported weak demand, noting that fewer or no customers were interested in purchasing their products**. In addition, 7.6 percent reported difficulties related to customers being unable to reach their business, or vice versa, and 5.8 percent continued to face challenges in obtaining sufficient raw materials.

Table 6. Main challenges for non-farm businesses and wage/salary workers

	Q2 – Q3 2023	Q3 – Q4 2024	Q2 – Q3 2025
Non-farm business			
High prices of raw materials or supplies	16.9	16.6	11.0
Fewer / no customers are interested in buying products	13.2	8.8	11.1
Customers cannot reach my business or I cannot reach customers	8.1	5.5	7.6
High prices of fuel / high transport costs	5.8	7.9	3.6
Unable to acquire enough raw materials / supplies (availability)	5.0	7.5	5.8
Wage salary			
Reduced working hours / less work	17.6	12.3	11.8
Low/reduced wages	7.3	8.8	4.9
Not safe to travel to work location	4.3	4.0	4.3

Source: Authors' calculations from MHWS data

For wage and salary workers, there was an improvement with 72.8 percent of wage workers reporting no major difficulties for earning income (Table A.3). While 11.8 percent still reported reducing working hours and less work, only 4.9 percent reported low/reduced income compared to

8.8 percent in the previous period. Another 4.3 percent reported that it was not safe to travel to their work location.

Over the three-year period from 2023 to 2025, around 60 percent of farmers consistently report difficulties earning income (Table A.5). For 23.7 percent, weather remained the main challenge (Table 7). **In Q2–Q3 2025, a higher share of crop farmers identified pests and diseases as their primary constraint (10.9 percent), while another 10.6 percent cited high input or mechanization costs**. Only 4.6 percent reported that difficulty hiring workers was their main challenge.

Table 7. Main challenges for crop production and sales

	Q2 – Q3 2023	Q3 – Q4 2024	Q2 – Q3 2025
Crop Production			
Weather problems	20.5	25.4	23.7
High prices of inputs/mechanization	11.8	9.6	10.9
Pest and disease problems	8.1	6.5	10.6
Difficulties hiring workers	5.8	3.8	4.6
Crop Sales			
Low prices for crops	14.6	10.8	28.0
Buyers or traders cannot reach the farm or I cannot reach them	5.3	5.2	5.9
Not many traders	1.9	2.5	3.2

Source: Authors' calculations from MHWS data

While production-related constraints remained relatively stable, challenges related to crop sales intensified. **In the previous round, 10.8 percent of farmers reported low crop prices as their main issue; in Q2–Q3 2025, that figure rose to 28.0 percent, making it the most frequently cited challenge**. In addition, 5.9 percent reported that buyers or traders could not reach the farm, or that they could not reach buyers, and 3.2 percent noted that there were too few traders operating in their area.

In contrast to crop producers—who in Q2–Q3 2025 increasingly identified low sales prices for crops as their primary challenge—livestock producers faced a somewhat different and comparatively less severe set of constraints (Table 8). **Their difficulties were mainly the cost and availability of inputs rather than weak selling prices**. Only 5.5 percent of livestock producers reported low prices for livestock or livestock products in Q2–Q3 2025, a share similar to the previous round and substantially lower than the 17.7 percent recorded in Q2–Q3 2023. Therefore, unlike crop farmers, in the most recent period, livestock producers' challenges stem more from production costs rather than from declining sales prices (Htar, et al. 2025).

Table 8. Main challenges for livestock production and sales

	Q2 – Q3 2023	Q3 – Q4 2024	Q2 – Q3 2025
Livestock Production			
Sickness or death of animals	23.4	9.7	17.7
High prices of inputs (animal feed, animals, medicine, etc.)	19.4	16.5	14.2
Unable to acquire enough inputs	7.5	11.4	8.6
Livestock Sales			
Low prices for livestock or livestock products	17.1	4.9	5.5
Buyers or traders cannot reach the farm or I cannot reach them	9.6	5.4	4.8
Not many traders	4.7	2.4	3

Source: Authors' calculations from MHWS data

Fishers faced challenges with both access to their fish ponds and low prices for selling fish. In Q2–Q3 2025, 27.1 percent of fishers reported that they were unable to reach their fishponds or fishing locations (Table 9). In addition, 7.9 percent reported difficulty obtaining sufficient inputs for their fishing activities, a marked increase relative to earlier rounds. On the sales side, 24.0 percent of fishers cited low fish prices as their main challenge, compared to just 4.8 percent in Q3–Q4 2024.

Table 9. Main challenges for fish production and sales

	Q2 – Q3 2023	Q3 – Q4 2024	Q2 – Q3 2025
Fish Production			
I can't reach my fish pond/fishing location	32.1	21.2	27.1
Water / irrigation supply problems	9.6	5.5	3.5
High prices of inputs	4.8	4.6	2.5
Unable to acquire enough inputs	3.1	2.3	7.9
Fish Sales			
Low prices for fish or fish products	8.6	4.8	24.0
Buyers or traders cannot reach me or I cannot reach them	7.2	5.8	5.1
Not many traders	6.4	5.5	4.1

Source: Authors' calculations from MHWS data

3. INCOME TRENDS AND POVERTY

3.1. Self-reported income trends

In MHWS, households are asked to consider their total household income over the past three months, including remittances and other transfers, and compare it to their income one year earlier. They are then asked whether their income has increased, remained the same, or decreased over this period. The proportion of households reporting an income increase relative to last year varies by main source of income (Table 10).

Overall, the share reporting an income increase declined significantly from 25.6 percent in Q3–Q4 2024 to 21.9 percent in Q2-Q3 2025. **By main source of income, households primarily engaged in own farming experienced a significant decline in the share of households reporting income increases, 18.2 percent in 2025 compared to 26.7 percent in 2023 and 2024**. The share of farm wage households reporting an increase in income also declined between Q3-Q4 2024 and Q2-Q3 2025. For wages, salary workers, and non-farm businesses, a similar share of households reported more income this year compared to last year, compared with 2024.

Table 10. Perception that income increased relative to last year, by main income source

	Round 6 Q2 – Q3 2023	Round 8 Q3 – Q4 2024	Round 9 Q2 – Q3 2025
Overall	22.8	25.6 ***	21.9
Own farming (%)	26.8 ***	26.6 ***	18.2
Farm wage (%)	20.0	29.4 ***	18.9
Non-farm wage (%)	19.3 *	22.2	22.4
Non-farm salary (%)	26.8 ***	35.4	32.5
Non-farm business (%)	18.9	20.8	20.7
Other sources (%)	23.7	21.0	20.8

Source: Authors' calculations from MHWS data

Table 11 presents the proportion of households reporting a decline in income over the past 12 months, with results shown for Q2–Q3 2023, Q3–Q4 2024, and Q2–Q3 2025. In Q2–Q3 2025, a slightly larger share of households reported a decline in income compared with the previous year. Nearly half of households primarily engaged in own farming reported a decline in income in Q2–Q3 2025, compared to lower shares in both previous years. More specifically, there was an 13.1 and 11.1 percentage point increase in farming households reporting less income compared to Q2-Q3 2023 and Q3-Q4 2024, respectively. Further, 40.9 percent of farm-wage households reported income losses in Q2–Q3 2025, compared to 35.9 percent in the previous round.

Table 11. Perception that income decreased relative to last year, by main income source

	Round 6 Q2 – Q3 2023	Round 8 Q3 – Q4 2024	Round 9 Q2 – Q3 2025
Overall	38.9	36.7 **	38.8
Own farming (%)	34.3 ***	36.3 ***	47.4
Farm wage (%)	44.2	35.9 *	40.9
Non-farm wage (%)	42.7 ***	39.6	36.3
Non-farm salary (%)	25.0 **	21.8	21.6
Non-farm business (%)	47.7 ***	45.0	42.8
Other sources (%)	36.9 *	35.1	31.6

Source: Authors' calculations from MHWS data

High shares of certain non-farm businesses report large income declines. This includes food-related businesses, where 53.6 percent of betel nut businesses, 46.4 percent of mobile food vendors, and 43.3 percent of prepared food and drink sellers and 44.0 percent of fixed food vendors reported large declines in income (Table 12). Among non-food businesses, hair salons, carpentry businesses, and clothing shops also reported substantial income losses. Comparing rural and urban areas, a higher share of rural businesses—particularly mobile food vendors—report income declines. A similar pattern is observed among clothing shops, with rural businesses faring worse than those in urban areas.

Table 12. Perception that income decreased relative to last year, by non-farm business

	National		Rural		Urban	
	Large decrease in income	Small decrease in income	Large decrease in income	Small decrease in income	Large decrease in income	Small decrease in income
Betel nut related business	34.0	18.6	40.1	15.9	27.9	21.3
Mobile food vendor	31.7	14.7	37.5	10.6	16.5	25.6
Hair salons/ Beauty shop	28.5	16.0	30.1	21.3	25.8	7.1
Selling prepared food/drinks	26.2	17.1	25.4	18.0	26.9	16.4
Fixed food vendor	25.3	18.7	23.4	19.4	27.8	17.7
Middlemen/broker	24.9	15.6	25.4	19.9	24.7	13.2
Carpentry/construction service	23.9	21.3	25.8	22.6	22.2	20.2
Clothing shop	21.7	21.2	31.4	19.6	12.7	22.7

Source: Authors' calculations from MHWS data.

3.2. Nominal and real income trends

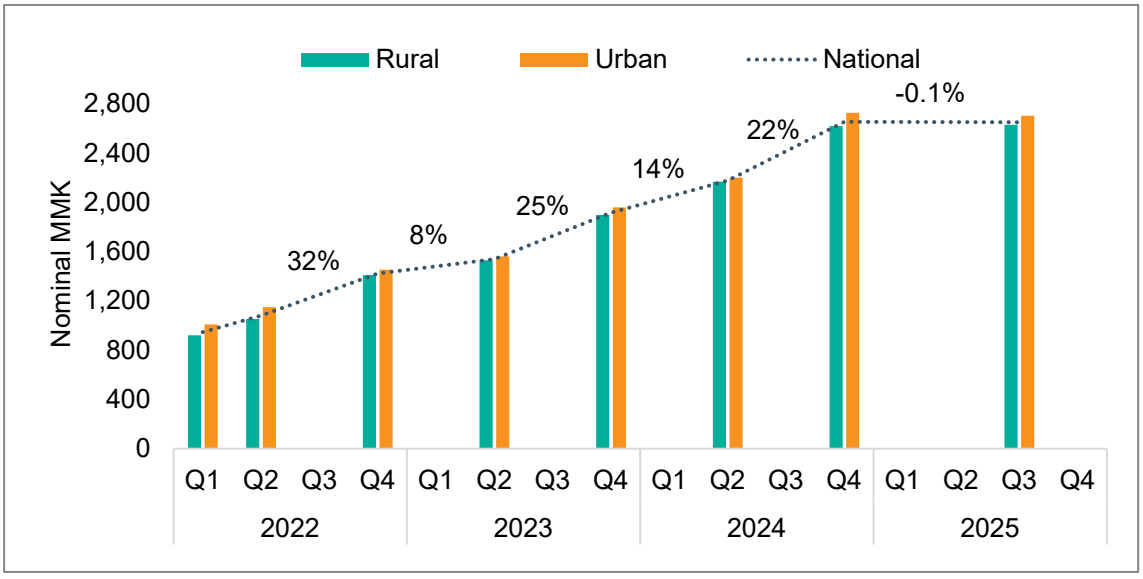
Food prices collected in each round of the MHWS, combined with household consumption weights from the 2015 Myanmar Poverty and Living Conditions Survey (MPLCS), are used to construct a food price index and monitor food inflation. **Due to the constraints of a phone survey, only a**

limited number of non-food prices can be collected, and these are insufficient to estimate non-food inflation; therefore, we focus exclusively on food inflation.

Households operating food vendor businesses report current prices for a set of staple items, including rice, potatoes, pulses, chicken, fish, leafy green vegetables, onions, bananas, and cooking oil. Enumerators instruct respondents to report the price of the cheapest available variety for each item. **As a result, the constructed basket reflects the lowest-cost food options typically available in local markets**. This approach ensures consistency across rounds but implies that the index is less likely to capture price increases in higher-quality or imported food products, whose prices may have risen more sharply in recent periods.

In the most recent period (July–October 2025), the nominal cost of the national food basket remained essentially unchanged, declining marginally from 2,654 MMK to 2,651 MMK per person per day (−0.1%), suggesting a temporary stabilization following a prolonged period of rapid food price inflation (Figure 1). The stabilization of the national food basket between R8 and R9 was driven primarily by declines in staple and vegetable prices, particularly rice (9 percent price decline) and onions (46 percent price decline). These reductions generated significant downward pressure on overall basket costs. However, this disinflation was almost entirely offset by continued sharp increases in animal-source foods, especially chicken (28 percent price increase) and fresh fish (37 percent price increase). As a result, total basket costs remained effectively unchanged.

Figure 1. Cost of the food basket (nominal kyat) and food price inflation (percent), by round



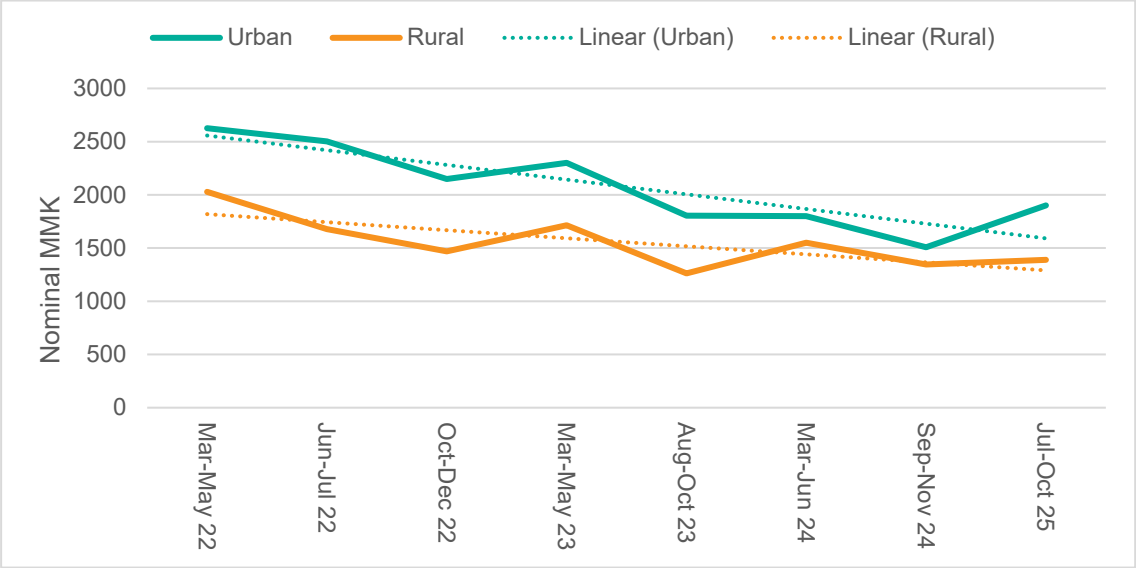
Note: Percentage change noted between survey rounds refers to change in the nominal value of the food inflation basket at the national level. Quarterly survey periods are as follows: Q1 2022 refers to December 2021–February 2022; Q2 2022 refers to April 2022–June 2022; Q4 2022 refers to October 2022–December 2022; Q2 2023 refers to March 2023–June 2023; Q4 2023 refers to September 2023–November 2023; Q2 2024 refers to April 2024–June 2024, Q4 2024 is September-December 2024, and Q3 2025 is July-October 2025.
Source: Authors' calculations based on MHWS data.

Total household income is the sum of income in the last month from 12 different economic activities plus property/land rental, remittance, unemployment/pension, and assistance income received in the past month. Total household income is adjusted for household size using Myanmar specific adult equivalency scales. Income is also adjusted for inflation and regional differences in cost of living using our food price index.

In urban areas, nominal daily income per adult equivalent increased sharply between Q3-Q4 2024 and Q2-Q3 2025 (4,125 to 5,222 MMK; +26.6 percent) (Figure 2). This coincided with a 24.6 percent increase in nominal construction wages over the same period, suggesting strong wage adjustments

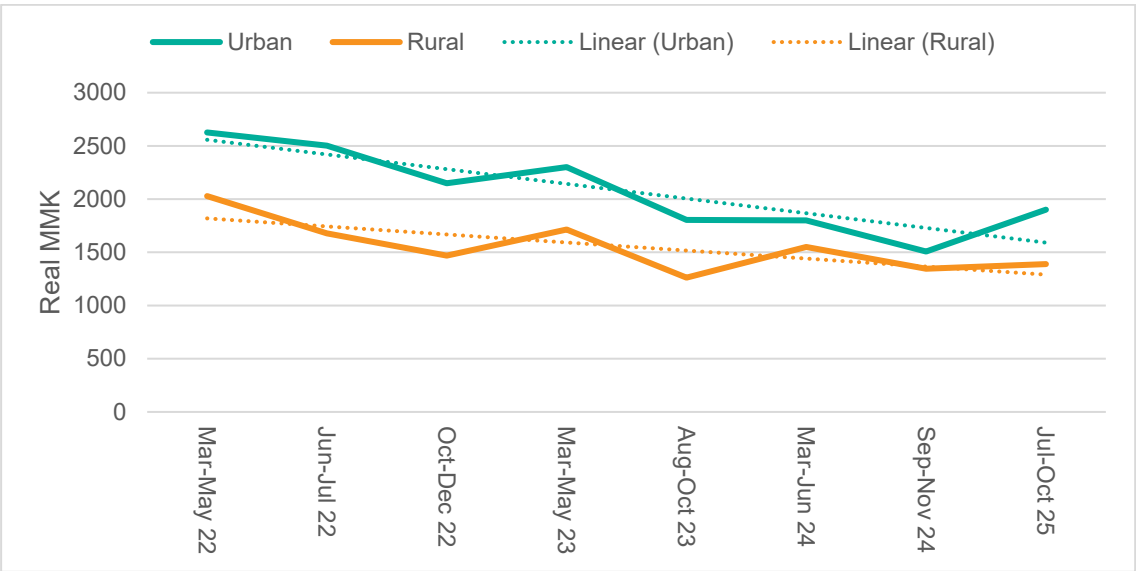
in urban labor markets (Zu 2026). **Because food basket costs stabilized over the same period, this nominal income growth translated directly into a substantial real income recovery (+26.1 percent)** (Figure 3). However, despite this improvement, real income levels in Q2-Q3 2025 (1,900 MMK) remained significantly below their peak in Q2 2022 (2,626 MMK), indicating that purchasing power has only partially recovered from earlier inflation-driven losses.

Figure 2. Median household income in the past 30 days (nominal MMK/adult equivalent/ day), by location and survey round



Note: Because target sample sizes were not achieved in Kachin and Rakhine, incomes for these states were imputed to maintain representativeness. Specifically, we used observed household incomes from the March–June period and updated them to the July–October reference period by applying state-specific food inflation rates. This adjustment allows nominal incomes to be expressed in comparable terms across time while preserving state-level price dynamics.
Source: Author's calculations based on MHWS data.

Figure 3. Inflation-adjusted median household income in the past 30 days (real MMK/adult equivalent/day), by location and survey round



Note: Real income is adjusted for spatial differences with Ayeyawady as the base and temporal differences in food costs and is presented in Q2 2022 MMK.
Source: Author's calculations based on MHWS data.

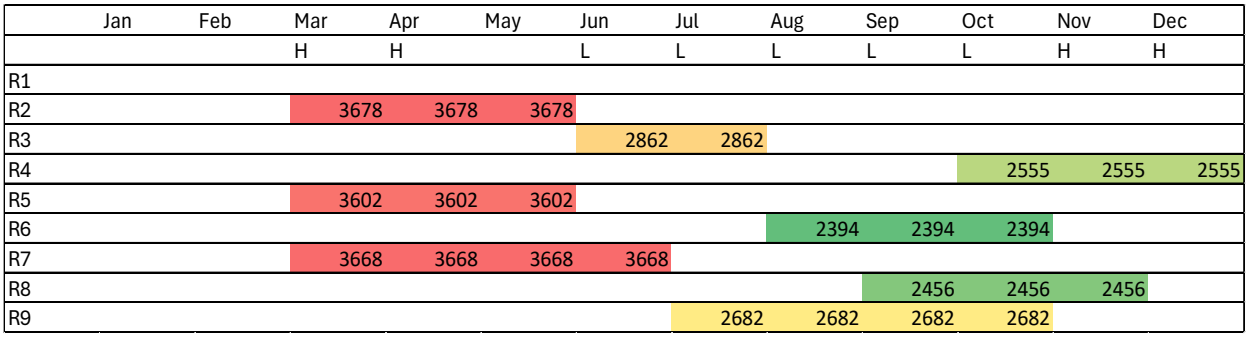
Rural nominal daily income per adult equivalent increased by only 2.9 percent between Q3-Q4 2024 and Q2-Q3 2025, a much weaker rise than observed in urban areas (Figure 3). Although nominal rural agricultural wages rose by 23.1 percent for men and 21.6 percent for women over the same period, these gains did not translate into comparable growth in overall household income (Zu 2026).

The key reason lies in rural income composition. Approximately 57.2 percent of rural households earn income from their own farms, relative to 23.7 percent who earn some income from wages. **The observed declines in rice, maize, oilseeds, most pulses (except green gram), and vegetable prices directly reduce farm-gate revenues**. Lower commodity prices compress agricultural income, offsetting gains from rising daily wage rates. Further, for some households the survey occurred before the harvest period, so they had not yet earned their agricultural income when surveyed.

Moreover, 9.2 percent of non-farm businesses in rural areas are farm-adjacent activities (traders, millers, food vendors, wholesalers). These activities are closely linked to agricultural commodity prices. Falling crop prices likely reduced margins in these businesses as well, as we can see in the self-reported income perceptions (Table 12). As a result, real rural income increased by only 2.9 percent between Q3-Q4 2024 and Q2-Q3 2025 (Figure 3). **Rural real income remains 31.5 percent below its Q2 2022 level**.

Real rural incomes are consistently higher in the early months of the year (March–May), corresponding to the post-harvest period, and lower during the mid-year lean season (June–October) (Figure 4). This cycle is particularly evident in rounds overlapping the June–September period, where mean real income drops markedly relative to adjacent periods. Thus, beyond inflation and wage dynamics, seasonal agricultural cycles continue to shape real purchasing power, likely amplifying vulnerability during the lean months.

Figure 4. Temporal pattern of inflation-adjusted mean rural household income (real MMK/adult equivalent/day)



Note: Real income is adjusted for spatial differences with Ayeyarwady as the base and temporal differences in food costs and is presented in Q2 2022 MMK

3.3. Poverty trends

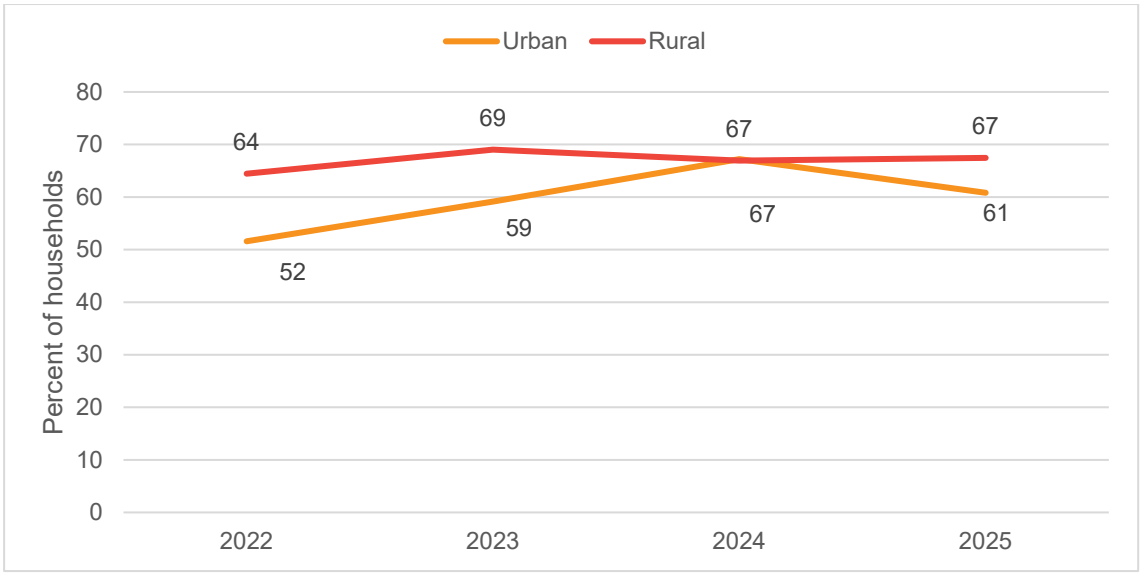
Our income-based poverty measure is a comparison of total real household income per adult equivalent with a national poverty line. The poverty line is the minimum welfare level for an individual not to be considered deprived, measured as the cost of a basic bundle of goods and services estimated to meet food and non-food needs. In previous in-person nationally representative surveys (the 2014/15 MPLCS and the 2017 Myanmar Living Conditions Survey (MLCS)), the share of poor was calculated using a consumption-expenditure aggregate. Unfortunately, in a phone survey, collecting detailed consumption and expenditure information is not feasible. Therefore, we use an income-based poverty measure to determine the number of households that fall below the poverty

line. It is important to note that our approach to poverty measurement is strictly meant to monitor poverty during the MHWS survey period. **MHWS poverty estimates are not comparable to previous Myanmar poverty estimates, World Bank estimates, or UNDP estimates due to differences in the welfare measure (i.e., income collected in phone interviews vs consumption-expenditure collected during in-person interviews)**.

We derive our poverty line from the national food poverty line used to measure poverty in the MPLCS and the MLCS (1,037 in 2017 kyat) (MoPF et al. 2019). We adjust the food poverty line measured in 2017 kyat for inflation first with the official food CPI through 2020, second with a MAPSA food price index from a national survey of food vendors through 2021 (MAPSA 2022), and third, with the food price index price from each MHWS survey round. Finally, we apply a spatial food price index from each MHWS survey round to adjust for differences in food costs in rural and urban areas within each state/region. **As noted, we collect an insufficient range of non-food items to adjust the non-food poverty line for inflation and thus calculate non-food poverty lines using the ratio of the food to the non-food poverty lines in 2017**. Total poverty lines are the sum of the food and non-food poverty lines.

Poverty trends closely mirror the real income dynamics described above. **Compared to 2024, where income poverty over the two survey periods, averaged 67.0 percent, income poverty declined in the most recent period to 65.3 percent**. The reduction, however, was entirely driven by urban areas, where income poverty fell from 67.2 to 60.8 percent, consistent with the strong rebound in real urban incomes (Figure 5). Rural income poverty remained the same at 67.4 percent. Despite the improvement in urban poverty, income poverty remained substantially higher than in 2022, when national income poverty stood at 60.9 percent, urban income poverty at 51.6 percent, and rural income poverty at 64.4 percent, underscoring the degree of the continued crisis.

Figure 5. Income poverty headcounts (percentage of the population living in income-poor households), by location and survey round

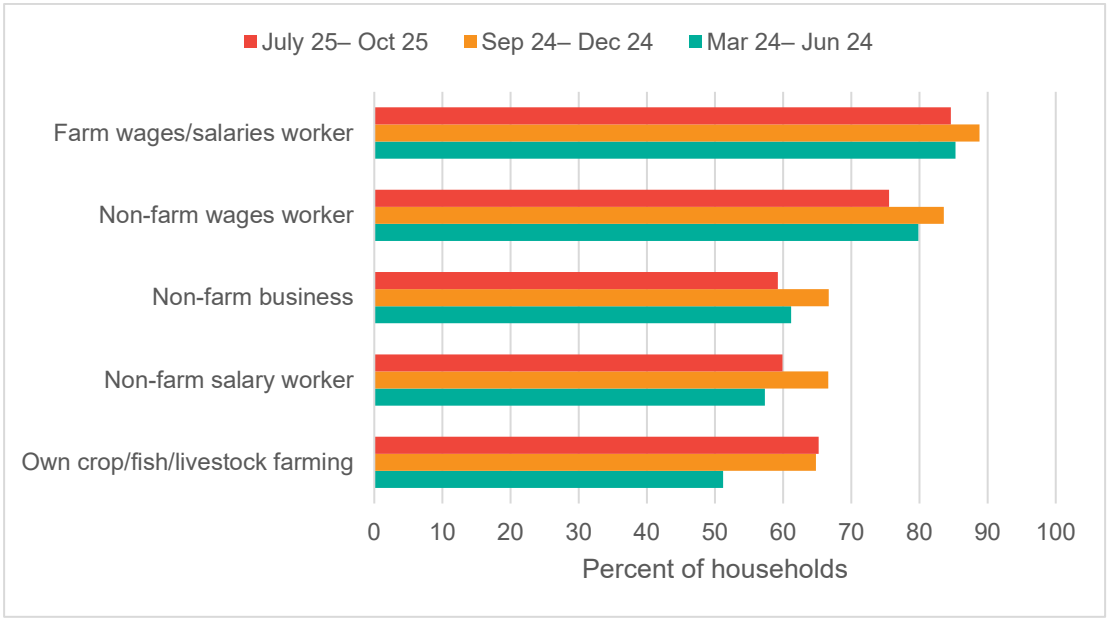


Note: Survey rounds are averaged for yearly numbers to account for the seasonality of income.
Source: Author's calculations based on MHWS data.

Between Q3-Q4 2024 and Q2-Q3 2025, income poverty declined among farm wage workers (88.8 to 84.6 percent), non-farm wage workers (83.6 to 75.5 percent), non-farm salaried workers (67 to 58 percent), and non-farm businesses (66.6 to 59.9 percent). **In contrast, income poverty among households engaged in own crop, fish, or livestock production remained essentially unchanged at 65.2 percent** (Figure 6). Further, when we compare Q2-Q3 2025 to the entire year

of 2024, we see an increase of income poverty among own-crop farmers by 7.2 percentage points. These patterns confirm that falling staple prices, while easing consumer pressure, have reduced income for producer-linked households.

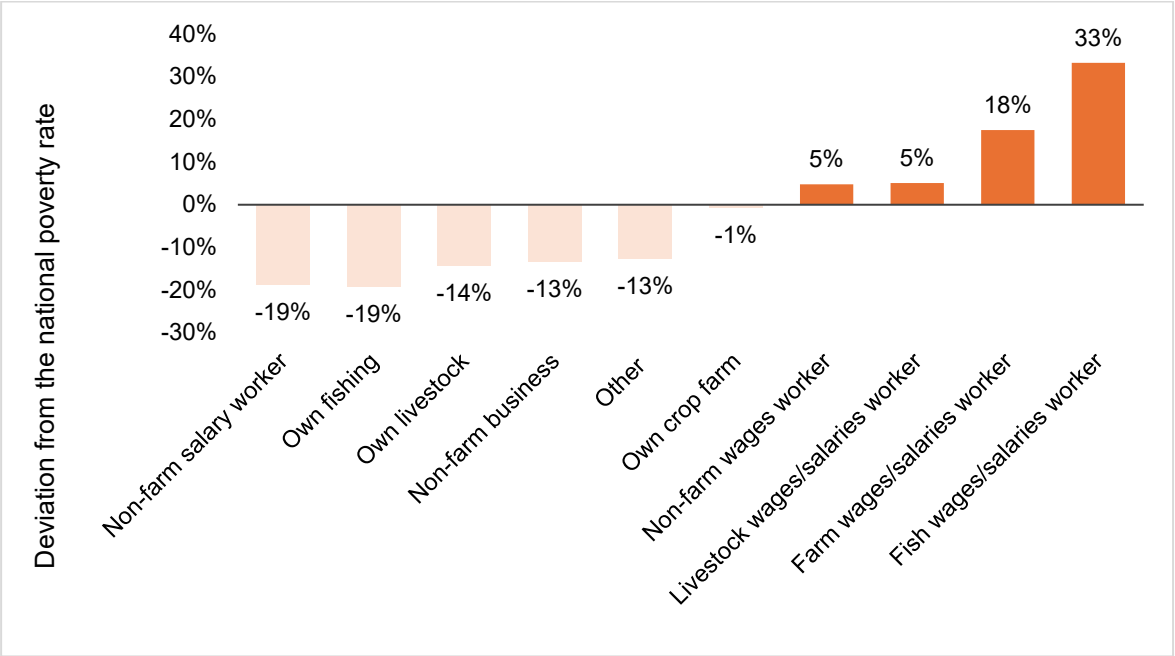
Figure 6. Trends in pooled income poverty headcounts (percentage of the population living in poor households), by livelihood and survey rounds



Note: Quarters correspond to the income recall period in each survey round.
Q2–Q3 2023 refers to June– November 2023; Q3–Q4 refers to July– December 2024; Q2-Q3 2025 refers to April– October 2025.
Source: Author's calculations based on MHWS data.

Four additional points are important to emphasize. **First, despite recent income poverty declines among wage-earning households, they remain the poorest and most vulnerable group** (Figure 7). Comparing income poverty rates to the national average (66.1 percent), households earning income from non-farm salaried work continue to have the lowest poverty levels, followed by fishing and livestock businesses and other non-farm businesses. In this period, own crop farmers have income poverty rates roughly in line with the national average, unlike in previous rounds when they fared better than most groups. By contrast, non-farm wage workers and crop wage workers—and to a greater extent livestock and fish wage workers—remain well below the national average in terms of welfare, with substantially higher income poverty rates. Thus, despite some favorable price movements and higher wages, wage workers continue to be by far the poorest livelihood group.

Figure 7. Average deviation from the income poverty line by main source of employment, Q2-Q3 2025



Note: Bars show percentage-point deviations from the national average. Positive values indicate outcomes above the national average; negative values indicate outcomes below the national average.
Source: Author's calculations based on MHWS data.

Second, despite the recent rise in real incomes, income poverty among asset-poor households has not declined; it has remained persistently high (Table 13). The observed recovery appears concentrated among middle and wealthier households, and primarily in urban areas. In other words, the improvement in purchasing power has not translated into meaningful poverty reduction at the bottom of the asset distribution.

Third, there is a substantial gap in poverty rates between households that receive remittances and those that do not (Table 13). **Among remittance-receiving households, 45.7 percent are poor, compared to 69.4 percent among non-recipients**. This 23.3-percentage-point difference suggests that, even with easing inflation, domestic real incomes alone are often insufficient to secure adequate consumption. The situation is particularly severe in rural areas: 72.2 percent of rural households without remittances remain below the poverty line, a figure that has remained largely unchanged since Q2-Q3 2023, indicating sustained hardship rather than temporary distress.

Fourth, poverty has remained the same for households who feel insecure. The poverty level remained at 69.6 percent for households who feel insecure compared to 65.1 for those who feel secure. A similar pattern is observed across conflict exposure. In conflict-affected areas, poverty levels remained at 71.2 percent whereas in less conflict-affected areas poverty fell from 67.5 percent to 59.0 percent between Q3-Q4 2024 and Q2-Q3 2025.

Finally, the trajectory of farming households highlights a turning point since 2022. In Q2-Q3 2022, farmers were comparatively less vulnerable, roughly half of farming households were poor, compared to 83.8 percent of farm wage workers. At that stage, rising agricultural prices were supporting producer incomes. The subsequent increase in poverty among farming households signals a reversal of that earlier advantage, consistent with the decline in rice and other crop prices, marking a clear shift in the welfare dynamics of agricultural producers.

Table 13. Percentage of the population living in poor households, by asset class, remittance receipt, and conflict, across survey rounds

	Round 6 Q2 – Q3 2023	Round 8 Q3 – Q4 2024	Round 9 Q2 – Q3 2025
Asset Class			
Asset poor	82.8 ***	79.2	78.8
Asset low	72.0 ***	70.7 ***	65.5
Asset rich	52.3 ***	58.8 ***	48.3
Received Remittances			
No remittances	75.1 ***	74.1 ***	69.9
Remittances	54.7 ***	53.6 ***	47.5
Reported physically insecure			
No	71.0 ***	70.5 ***	65.1
Physically insecure	73.9 ***	70.6	69.6
Conflict [a]			
Conflict affected areas	74.8 ***	72.6	71.2
Less conflict affected areas	67.3 ***	67.5 ***	59.0
Farm household			
Small holders (<= 2 aces)	82.1 ***	70.5 ***	70.6
Large holders (>2 acres and above)	62.5	62.0	62.9

Note: Quarters correspond to the recall period in each survey round. Q2–Q3 2023 refers to June– November 2023; Q3–Q4 refers to July– December 2024; Q2-Q3 2025 refers to April– October 2025. Asterisks indicate statistically significant differences compared to round 9: *p < 0.10, ** p < 0.05, *** p < 0.01.
[a] Conflicted affected areas classified based on the ACLED. Less conflict affected areas include Yangon, Ayeyarwady, Mandalay, and Nyi Pyi Taw.
Source: Author's calculations based on MHWS data.

4. CONCLUSION

Despite cooling inflation, Myanmar's economy continues to remain in a protracted crisis, with 65.2 percent of the population living under the income poverty line. While food price stabilization has improved purchasing power, income gains have been highly asymmetric. Urban areas experienced strong nominal wage growth—particularly in construction—which translated almost one-for-one into real income gains. Rural areas, by contrast, saw only modest real income growth, as falling rice and other crop prices compressed farm revenues and reduced earnings in farm-adjacent businesses.

Poverty trends reflect this divergence. National income poverty declined between late 2024 and mid-2025, driven primarily by reductions in urban poverty and improvements among wage and salaried workers. However, poverty among agricultural producers remained largely unchanged. Further, despite recent improvements, poverty levels remain well above early 2022 benchmarks across all groups.[2]

Additionally, several groups remain persistently worse off despite recent improvements. Asset-poor households continue to exhibit the highest poverty rates. Farm-wage workers remain among the most vulnerable livelihood groups, with poverty rates still exceeding 80 percent, reflecting low and unstable earnings. In addition, households without remittance income face substantially higher poverty rates than those receiving remittances. Without meaningful improvements in jobs and incomes, recent progress is unlikely to last, and most households will continue to struggle to meet basic needs.

[2] As with all phone-based surveys in conflict-affected settings, the findings likely underestimate welfare deterioration. Limited access to telecommunications and electricity, particularly in highly conflict-affected areas, and the difficulty of reaching internally displaced populations mean that the most vulnerable households may be underrepresented.

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APPENDIX

Table A.1. Percentage of households by income source and primary livelihood, across survey rounds

	Receives Income from Source			Considers Source the Primary Livelihood		
	Round 6 Q2 – Q3 2023	Round 8 Q3 – Q4 2024	Round 9 Q2 – Q3 2025	Round 6 Q2 – Q3 2023	Round 8 Q3 – Q4 2024	Round 9 Q2 – Q3 2025
Own farming (%)	47.8 ***	43.0 **	40.9	29.4 *	28.9	27.9
Farm wage (%)	23.5 ***	18.7 **	17.2	12.6 ***	10.4 ***	9.0
Non-farm wage (%)	21.9 ***	20.1	19.2	14.1 ***	13.7 *	12.6
Non-farm salary (%)	20.7 ***	22.0 ***	26.0	12.9 ***	13.9 ***	15.8
Non-farm business (%)	34.1	34.0 ***	37.4	23.3 ***	23.9 ***	26.1
Other sources (%)	25.1	22.1 ***	24.3	7.6	9.2	8.6
- Land/property rentals (%)	3.9	3.4	3.5			
- Assistance/pensions (%)	8.9	8.0	8.4			
- Remittances (%)	15.5	13.5 ***	15.2			
- No income sources (%)	0.5	1.2 ***	0.6			

Note: Quarters correspond to the recall period in each survey round. Q2–Q3 2023 refers to June– October 2023; Q3–Q4 refers to July–December 2024; Q2-Q3 2025 refers to April– October 2025. Asterisks indicate statistically significant differences compared to round 9: *p < 0.10, ** p < 0.05, *** p < 0.01.
Source: Author's calculations based on MHWS data.

Table A.2. Main challenges for non-farm businesses

	Q3 – Q4 2024			Q2 – Q3 2025		
	Rural	Urban	National	Rural	Urban	National
No difficulties	49.4	40.9	45.6	56.2	50.6	53.6
High prices of raw materials or supplies	14.5	19.1	16.6	9.6	12.6	11.0
Fewer / no customers interested in buying products	6.7	11.4	8.8	10.2	12.0	11.1
Customers cannot reach my business or I cannot reach customers	5.6	5.2	5.5	7.0	8.2	7.6
High prices of fuel / high transport costs	7.0	9.1	7.9	3.4	3.7	3.6
Unable to acquire enough raw materials / supplies (availability)	7.7	7.1	7.5	6.1	5.5	5.8
Difficult to reclaim debts/customers purchase more on credit	2.9	1.7	2.4	2.8	2.5	2.7
Disruption to banking services, access to cash or loans	1.4	1.5	1.4	0.7	0.6	0.6
Electricity / energy supply problems	2.3	1.8	2.1	1.6	1.8	1.7
Difficulties hiring workers	1.3	0.7	1.0	1.3	1.2	1.2
Customers cannot reach my business or I cannot reach customers due to cyclone	1.3	1.3	1.3	0.0	0.0	0.0
Customers cannot reach my business or I cannot reach customers due to earthquake	0.0	0.0	0.0	0.7	0.8	0.7
Other	0.0	0.0	0.0	0.4	0.5	0.4
Number of observations	1,264	1,585	2,849	1,533	1,417	2,950

Source: Authors' calculations based on MHWS data.

Table A.3. Main challenges for wage/salary work

	Q3 – Q4 2024			Q2 – Q3 2025		
	Rural	Urban	National	Rural	Urban	National
No difficulty	65.7	68.1	66.7	71.8	73.9	72.8
Reduced working hours / less work	14.1	9.5	12.3	13.5	9.7	11.8
Low/reduced wages	7.9	10.1	8.8	4.1	5.9	4.9
Not safe to travel to work location	4.4	3.4	4.0	4.6	3.8	4.3
Unable to work due to health problems of worker or other household members	2.1	2.5	2.3	1.4	1.1	1.2
High transportation costs	2.2	3.5	2.7	1.1	1.2	1.2
Not able to reach work location	1.1	0.5	0.9	1.4	1.0	1.2
Not safe at work location	1.2	1.1	1.2	0.9	1.7	1.2
Late payment of wages/income	1.0	1.2	1.1	0.9	1.1	1.0
Other	0.3	0.0	0.2	0.2	0.4	0.3
Number of observations	2,122	2,208	4,330	2,400	1,888	4,288

Source: Authors' calculations based on MHWS data.

Table A.4. Main challenges for crop production

	Q3 – Q4 2024			Q2 – Q3 2025		
	Rural	Urban	National	Rural	Urban	National
No difficulties	42.4	28.0	41.8	40.6	38.0	40.6
Weather problems	25.1	33.6	25.4	23.7	22.7	23.7
High prices of inputs or mechanization	9.4	13.4	9.6	10.6	19.7	10.9
Pest and disease problems	6.6	3.4	6.5	10.9	3.3	10.6
Difficulties hiring workers	3.8	2.7	3.8	4.8	1.8	4.6
Disruption to banking services, access	1.5	3.5	1.6	1.5	1.6	1.5
Water / irrigation supply problems	2.4	2.1	2.4	2.5	1.1	2.5
Unable to acquire enough inputs or mech	3.2	11.0	3.5	2.8	1.4	2.8
High prices of fuel	1.8	0.7	1.7	1.2	10.2	1.5
I cannot reach my own farm	1.1	1.2	1.1	0.7	0.2	0.7
Unable to harvest due to cyclone Yagi	2.6	0.5	2.5	0.0	0.0	0.0
Other	0.0	0.0	0.0	0.7	0.0	0.7
Number of observations	3,189	218	3,407	3,161	155	3,316

Source: Authors' calculations based on MHWS data.

Table A.5. Main challenges for crop sales

	Q3 – Q4 2024			Q2 – Q3 2025		
	Rural	Urban	National	Rural	Urban	National
No difficulties	78.4	64.5	77.8	60.0	58.8	60.0
Low prices for crops	10.7	12.8	10.8	28.0	27.8	28.0
Buyers or traders cannot reach the farm or I cannot reach them	5.3	3.7	5.2	5.9	4.3	5.9
Not many traders	2.1	9.3	2.5	3.0	6.8	3.2
High price of fuel / high transportation cost	2.1	1.4	2.0	2.1	2.1	2.1
Payment problems	0.2	0.2	0.2	0.2	0.0	0.2
Markets are closed	0.1	8.3	0.5	0.1	0.2	0.1
Buyers or traders cannot reach the farm or I cannot reach them because of cyclone	1.1	0.0	1.0	0.0	0.0	0.0
Other	0.0	0.0	0.0	0.5	0.0	0.5
Number of observations	2,795	201	2,996	2,875	138	3,013

Source: Authors' calculations based on MHWS data.

Table A.6. Main challenges for livestock production

	Q3 – Q4 2024			Q2 – Q3 2025		
	Rural	Urban	National	Rural	Urban	National
No difficulties	57.6	47.4	56.4	60.0	49.2	58.8
Sickness or death of animals	9.7	9.7	9.7	18.7	9.5	17.7
High prices of inputs (animal feed, animals, medicine, etc.)	17.4	10.1	16.5	13.7	18.2	14.2
Unable to acquire enough inputs	9.4	27.2	11.4	7.1	20.7	8.6
Disruption to banking services, access to cash or loans	0.0	0.0	0.0	0.2	0.0	0.2
I cannot reach my livestock	2.1	1.4	2.0	0.0	0.0	0.0
Difficulties hiring workers	0.2	1.4	0.3	0.2	2.0	0.4
Electricity / energy supply problems	0.0	0.0	0.0	0.0	0.0	0.0
Water / irrigation supply problems	1.8	0.0	1.6	0.0	0.4	0.0
I lost my livestock or death of animals due to cyclone Yagi	1.9	2.8	2.0	0.0	0.0	0.0
Number of observations	225	39	264	224	24	248

Source: Authors' calculations based on MHWS data.

Table A.7. Main challenges for livestock sales

	Q3 – Q4 2024			Q2 – Q3 2025		
	Rural	Urban	National	Rural	Urban	National
No difficulties	84.3	82.9	84.1	84.2	85.0	84.3
Low prices for livestock or livestock products	5.0	4.1	4.9	6.2	0.0	5.5
Buyers or traders cannot reach the farm or I cannot reach them	5.8	2.2	5.4	4.9	4.6	4.8
Not many traders	1.8	7.1	2.4	2.8	4.6	3.0
Lowered demand for purchase of livestock produces	1.5	0.0	1.3	1.1	0.0	1.0
Payment problems	0.0	0.0	0.0	0.0	0.0	0.0
High price of fuel / high transportation cost	1.7	3.8	1.9	0.9	5.9	1.4
Number of observations	225	39	264	224	24	248

Source: Authors' calculations based on MHWS data.

Table A.8. Main challenges for fish production

	Q3 – Q4 2024			Q2 – Q3 2025		
	Rural	Urban	National	Rural	Urban	National
No difficulties	45.7	18.6	44.6	49.3	94.1	54.7
I cannot reach my fish pond / fishing location	21.2	21.6	21.2	30.8	0.0	27.1
Water / irrigation supply problems	4.4	29.0	5.5	4.0	0.0	3.5
High prices of inputs	4.4	9.9	4.6	2.2	4.6	2.5
Unable to acquire enough inputs	2.0	9.8	2.3	8.8	1.3	7.9
Disruption to banking services, access to cash or loans	1.5	0.0	1.4	1.0	0.0	0.9
High price of fuel	2.4	0.0	2.3	2.1	0.0	1.8
Difficulties hiring workers	1.7	2.6	1.7	0.7	0.0	0.6
Electricity / energy supply problems	1.1	0.0	1.1	0.0	0.0	0.0
I lost my business due to cyclone Yagi	15.6	8.4	15.3	0.0	0.0	0.0
Other	0.0	0.0	0.0	1.1	0.0	0.9
Number of observations	154	12	166	129	12	141

Source: Authors' calculations based on MHWS data.

Table A.9. Main challenges for fish sale

	Q3 – Q4 2024			Q2 – Q3 2025		
	Rural	Urban	National	Rural	Urban	National
No difficulties	78.5	93.6	79.0	62.0	100.0	66.6
Low prices for fish or fish products	4.9	0.0	4.8	27.3	0.0	24.0
Buyers or traders cannot reach me or I cannot reach them	6.0	0.0	5.8	5.8	0.0	5.1
Not many traders	5.4	6.4	5.5	4.6	0.0	4.1
High price of fuel / high transportation cost	2.8	0.0	2.7	0.3	0.0	0.3
Payment problems	1.2	0.0	1.2	0.0	0.0	0.0
Buyers or traders cannot reach the farm or I cannot reach them because of cyclone	1.2	0.0	1.1	0.0	0.0	0.0
Number of observations	144	11	155	128	12	140

Source: Authors' calculations based on MHWS data.

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