

Myanmar Monthly Food Price Report – December 2025

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KEY HIGHLIGHTS

- Rice prices declined sharply in December 2025 nationally, falling by 20 percent year-on-year and 5 percent month-on-month. These declines were driven by falling international prices and increased market supply from the monsoon harvest. All states and regions saw stable or declining prices month-on-month, with the largest drops observed in major rice-producing regions such as Ayeyarwady (30 percent) and Sagaing (19 percent). While these trends benefit consumers, they raise concerns for paddy producers, especially in light of [rising agricultural input costs](#).
- Prices of pulses diverged. Green gram prices rose sharply year-on-year (21 percent), supported by export demand following China's decision to ease its temporary suspension. In contrast, black gram, chickpea, and pigeon pea prices remained well below last year's levels, reflecting weak demand from India. Maize prices also declined year-on-year (6.5 percent).
- Animal-sourced food prices surged over the past year, led by mutton (up 58 percent), due to lower production, while fish prices rose amid strong export demand.
- Multiple risks lie ahead, including weak international agricultural commodity prices, ongoing conflict, export quality concerns, import restrictions affecting livestock production, border trade and regional policy changes, and policy uncertainty, all of which may undermine agricultural incentives, farm incomes, and food security.

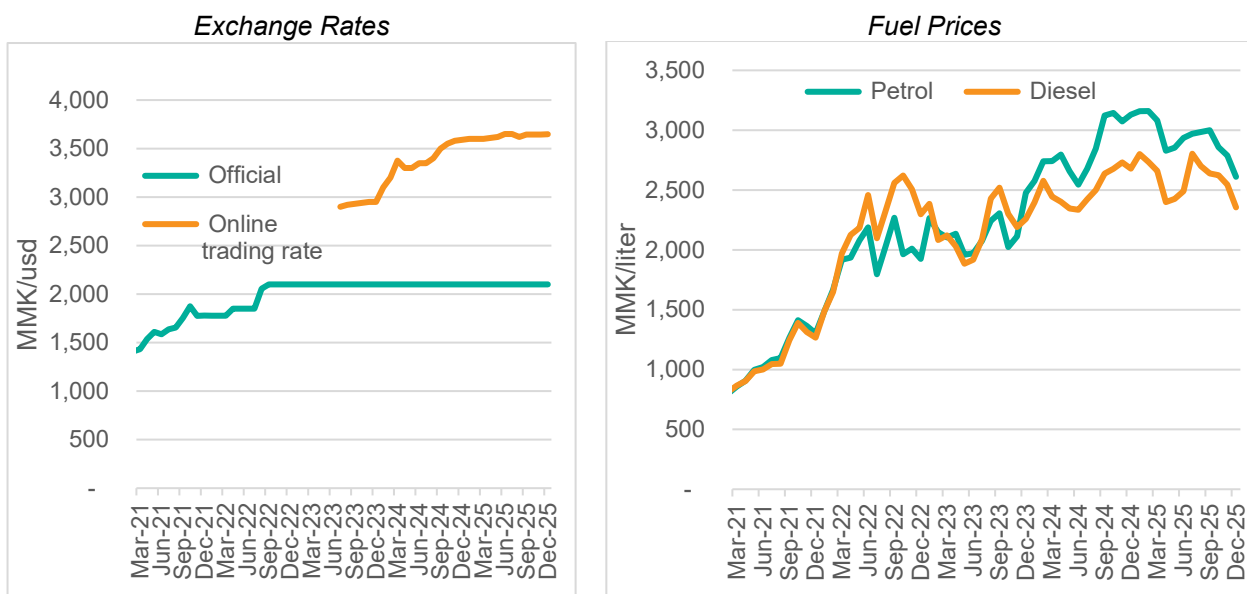
Introduction

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 December 2025, the official exchange rate remained unchanged at 2,100 MMK/USD – the same level for three years (Figure 1). Meanwhile, the online trading rate had risen by 2 percent compared to December 2024. These rates affect export crop prices, as 25 percent of export earnings must be exchanged at the official rate, with the remaining 75 percent exchanged at the online trading rate.¹ In terms of fuel, diesel prices in December 2025 declined by 12 percent, while petrol prices declined by 17 percent, relative to the same month in 2024.

¹ This [exchange rate ratio has been amended](#) in January 2026.

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 a 20 percent year-on-year decrease in rice prices in December 2025, marking a reversal from previous years largely driven by falling international prices. A comparison of rice prices across different regions and states reveals the following:

- Major rice-producing areas – Ayeyarwady and Sagaing – report the highest price declines among all regions and states in December 2025 compared to the previous month (30 and 19 percent, respectively), likely reflecting increased market supply from newly harvested rice. Mon and Kayin also report large price declines (12 percent). The remaining states and regions reported largely stable month-on-month prices.
- Almost all states and regions experienced significant price drops year-on-year, with Kayah (44 percent), Ayeyarwady (41 percent), Mon (31 percent) and Sagaing (30 percent) reporting the largest ones.
- Ayeyarwady and Mon report relatively low prices, at 32 and 29 percent below the national average, respectively. Prices remain high in Shan (North and East) and Magway relative to the national average last month.

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

State/Region	Comparison over Time (nominal prices)						Comparison of States/Regions (relative to national average)			
	Dec-25	Dec-24			Nov-25			Dec-25	Dec-24	Nov-25
	Current	Last Year			Last Month			Current	Last Year	Last Month
Kachin	1,692	1,692	→	0.0%	1,692	→	0.0%	1.16	0.94	1.11
Shan (North)	2,350	2,586	↓	-9.1%	2,350	→	0.0%	1.62	1.43	1.54
Shan (East)	1,974				1,974	→	0.0%	1.36		1.29
Shan (South)	1,363	1,693	↓	-19.5%	1,363	→	0.0%	0.94	0.94	0.89
Kayah	1,316	2,350	↓	-44.0%	1,316	→	0.0%	0.91	1.30	0.86
Kayin	1,316	1,786	↓	-26.3%	1,504	↓	-12.5%	0.91	0.99	0.98
Mon	1,034	1,504	↓	-31.3%	1,175	↓	-12.0%	0.71	0.83	0.77
Tanintharyi	1,316	1,740	↓	-24.3%	1,316	→	0.0%	0.91	0.96	0.86
Yangon	1,504	1,598	↓	-5.9%	1,504	→	0.0%	1.03	0.88	0.98
Ayeyarwady	987	1,668	↓	-40.8%	1,410	↓	-30.0%	0.68	0.92	0.92
Sagaing	1,222	1,739	↓	-29.7%	1,504	↓	-18.8%	0.84	0.96	0.98
Mandalay	1,504	1,881	↓	-20.0%	1,504	→	0.0%	1.03	1.04	0.98
Magway	1,786	2,022	↓	-11.7%	1,880	↓	-5.0%	1.23	1.12	1.23
Bago	1,222	1,410	↓	-13.4%	1,222	→	0.0%	0.84	0.78	0.80
Nay Pyi Taw	1,222	1,646	↓	-25.7%	1,222	→	0.0%	0.84	0.91	0.80
National Avg.	1,454	1,808	↓	-19.6%	1,529	↓	-4.9%	1.00	1.00	1.00

Source: Department of Consumer Affairs

Other Crops

Similar to rice, several major export crops, including black gram, chickpea and pigeon pea, recorded significant price decreases in December 2025 compared to the same period last year, possibly driven [by the Indian government's push to promote its own pulses production](#). Prices for these pulses remained relatively stable month-on-month as [new pulses entered the market, along with carryover stocks from last season, while demand from local grain millers remained stable](#). In contrast, green gram prices rose (by 21 percent) year-on-year in December 2025 (Table 2), supported by sustained export demand despite [recent rejections by China of export shipments with high residue levels](#). Maize prices decreased by 6.5 percent year-on-year but increased by 10 percent month-on-month. The monthly increase appears to be linked to [reports of stronger demand from feed mills in the Philippines, rising poultry and swine production in Thailand](#), and the approaching tax-exempt import period for Thailand.

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

Commodity	Dec-25	Dec-24			Nov-25		
	Current	Last Year			Last Month		
Export Crops							
- Maize	858	918	↓	-6.5%	780	↑	10.0%
- Green Gram	3,604	2,974	↑	21.2%	3,626	↓	-0.6%
- Black Gram	2,787	3,497	↓	-20.3%	2,899	↓	-3.9%
- Chickpea	2,394	3,418	↓	-29.9%	2,476	↓	-3.3%
- Pigeon Pea	2,883	3,805	↓	-24.2%	2,822	↑	2.2%
Local Crops							
- Onion	1,599	3,087	↓	-48.2%	1,539	↑	3.9%
- Garlic	6,920	12,287	↓	-43.7%	7,701	↓	-10.1%
- Chili	10,969	11,275	↓	-2.7%	10,544	↑	4.0%
- Potato	3,937	5,012	↓	-21.4%	4,048	↓	-2.7%

Source: Myantrade and DoA - MIS

Vegetable prices declined across the board year-on-year, with the steepest drops observed for onions (48 percent) and garlic (44 percent). Onion prices have been low due to [weak export demand](#), although they rose by 4 percent month-on-month. Persistently low onion prices in 2025 seem to have [discouraged production, leading market participants to expect higher prices next year](#). Garlic prices declined by 10 percent month-on-month, reflecting increased supply in the market and softer demand. However, similar to onions, [market participants expect garlic prices to rise in 2026 as lower production at the end of 2025 is likely to have tightened local supply](#). Potato prices declined by 21 percent year-on-year and 3 percent month-on-month. [Heavy rains disrupted potato production in 2025 affecting yields and quality, leading to poorer quality produce in the market, and pushing prices down](#). Chili prices slightly rose month-on-month, despite [recent reports of high pesticide residues in chili exports to Thailand](#). The price increase is likely driven by lower production in some major growing areas, including [Ayeyarwady Region, where reduced supply this season has pushed local prices higher](#).

Animal-Sourced Food

Most animal-sourced foods saw substantial year-on-year price increases in December 2025 (Table 3). Mutton recorded the largest year-on-year increase, rising by 58 percent and reaching an [all-time-high](#) this month as [many goat producers have exited the market and transportation disruptions persist in key production areas](#). Pork prices rose by 19 percent year-over-year, driven by [increased swine fever outbreaks](#), but were mostly stable month-on-month due to [higher imports of pigs from Thailand](#). Chicken prices increased 6.5 percent year-on-year but decreased 10 percent month-on-month, despite [high mortality in poultry broiler farms](#) making the [farmers face losses amid increased feed prices](#). Fish prices also rose year-on-year – by 54 percent for carp and 43 percent for rohu – driven by [continued strong export demand](#). However, these prices remained stable in December.

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

Commodity	Dec-25	Dec-24		Nov-25	
	Current	Last Year		Last Month	
- Eggs (piece)	465	423	↑ 10.1%	458	↑ 1.5%
Meat					
- Chicken	12,500	11,742	↑ 6.5%	13,895	↓ -10.0%
- Beef	17,634	13,041	↑ 35.2%	17,560	↑ 0.4%
- Pork	20,000	16,802	↑ 19.0%	19,940	↑ 0.3%
- Mutton	25,298	16,012	↑ 58.0%	23,958	↑ 5.6%
Fish					
- Carp	16,488	10,714	↑ 53.9%	16,488	→ 0.0%
- Rohu	10,833	7,560	↑ 43.3%	10,833	→ 0.0%

Source: Department of Consumer Affairs

Looking Forward

Key developments to monitor in upcoming months include:

- **Quality concerns in exports.** Recent detections of pesticide residues in green gram exports to China and chili exports to Thailand point to broader quality-control challenges that could affect export demand. Although the [Myanmar Pesticide Registration Board has banned](#) the use of the identified pesticides, effective monitoring and enforcement remain critical to prevent further trade disruptions.
- **International rice price developments:** International rice prices declined substantially in December 2025 – [down 15 percent](#) compared to the same period last year. Given Myanmar’s strong integration with global markets, these price trends have important implications for agricultural incentives, paddy production, farm incomes, and rice exports.
- **Conflict-driven food price increases:** Ongoing conflicts and road closures have contributed to higher food prices in affected areas. As conflicts continue to escalate, food security in these areas is likely to remain fragile.

- **Import restrictions.** Stringent import restrictions are hampering livestock production by limiting access to key inputs such as soybean meal (commonly used for feed), veterinary products, and parent breeding stock for poultry. These constraints are expected to keep prices of animal-source foods high.
- **Exchange rate and policy uncertainty.** The Central Bank of Myanmar has continued to intervene actively in the foreign exchange market to stabilize the kyat and support essential imports. However, potential changes to exchange rate policies in early 2026 may slow or reverse the sharp price declines observed in 2025 for some major export crops, such as rice, maize, and pulses.

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