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Farm Commercialization and Farm Services

Myanmar Agricultural Performance Survey (Dry Season 2025)

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Livelihoods and Food Security Fund

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ABSTRACT

- Prices of major crops declined substantially in the 2025 dry season compared to the previous year. Paddy prices fell by 15 percent, and most major non-paddy crop prices also decreased. The only major exception was green gram. With yields also declining nationwide, many farmers reported lower sales income: only 28 percent indicated that their sales income had increased, while a quarter reported declines of more than 20 percent.
- While output prices mostly fell, input prices continued to rise in the 2025 dry season compared to 2024. Urea prices increased by 18 percent. Mechanized plowing costs rose by 29 percent (for 4-wheel tractors), while hired labor costs surged by 47 percent for men and 43 percent for women. These sharp wage increases may partly reflect the introduction of the Military Service Law.
- Agricultural inputs were generally accessible during the 2025 dry season, reflecting the resilience of the private sector in delivering these products. Fewer farmers reported shortages of chemical fertilizers, pesticides, and seeds compared to last year.
- Use of agricultural credit declined during the 2025 dry season, falling from 45 percent in 2022 to 31 percent in 2025—a decrease of 14 percentage points.
- Agricultural extension services have rebounded. After falling by 5 percentage points from 39 percent in 2022 to 34 percent in 2024, usage rose again to 38 percent in the 2025 dry season. This recovery was driven by private extension services, and use of digital agricultural extension services also increased.
- 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. Farmers in conflict-affected areas face greater obstacles to commercialization, including reduced availability of agricultural inputs.

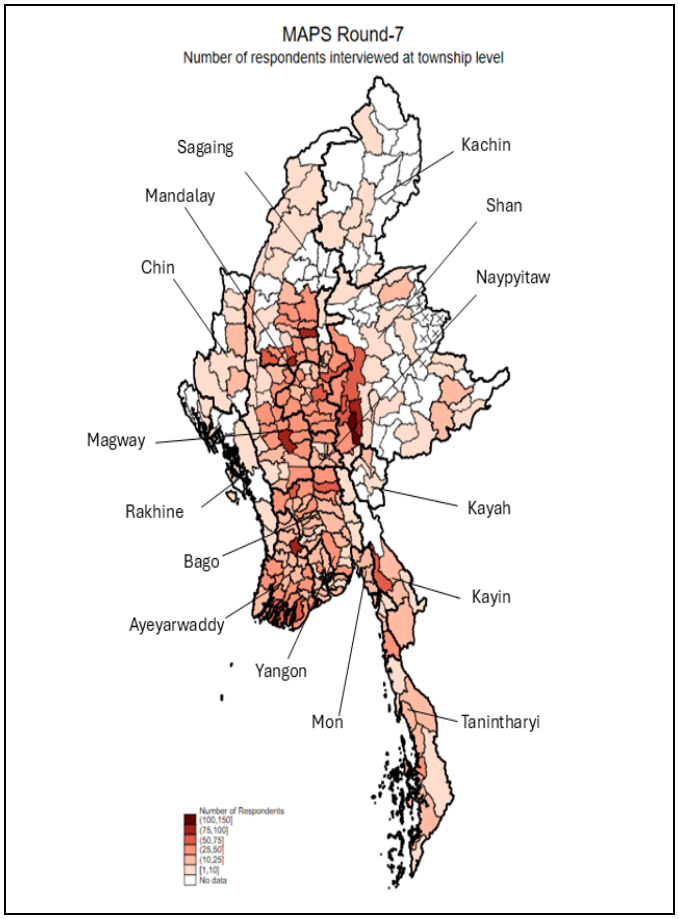
1. INTRODUCTION

This Working Paper presents findings from an assessment of farm commercialization and farm services during the 2025 dry season (post/pre-monsoon season). The analysis is based on data from the Myanmar Agriculture Performance Survey (MAPS), a phone-based survey conducted with 4,845 crop farmers across all states/regions of the country during Q3/Q4 of 2025. 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 marketings.

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 mid-2025. 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 dry season. The survey was implemented from August 11 to October 26, 2025. 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, and Rakhine.

Figure 1. Sample of crop farmers, MAPS dry season 2025



State/Region	Sample	Agro-ecological Zone	Sample
Kachin	17	Hills	873
Kayah	29	Dry	1,997
Kayin	110	Delta	1,642
Chin	56	Coastal	333
Sagaing	725	**Total**	**4,845**
Tanintharyi	136		
Bago	606		
Magway	580		
Mandalay	579		
Mon	177		
Rakhine	20		
Yangon	221		
Shan	661		
Ayeyarwady	815		
Nay Pyi Taw	113		
Total	4,845		

Source: Authors' calculations based on MAPS, dry season 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]

Table 1. Descriptive crop farmers, MAPS dry season 2025

	Unit	National	Hills	Dry	Delta	Coastal
Total number of farmers	Number	3,771	609	1,527	1,377	258
Area cultivated - acres	Mean	4.40	3.25	4.05	5.48	5.08
Area cultivated - acres	Median	3.00	2.00	3.00	4.00	3.50
Crops grown in post-/pre-monsoon 2024						
Rice	% of farmers	19.4	9.3	14.2	36.5	8.8
Black gram	% of farmers	11.7	1.0	4.1	30.5	6.4
Sesame	% of farmers	12.8	1.4	33.0	2.1	0.5
Green gram	% of farmers	7.8	0.1	8.9	11.4	11.6
Chickpea	% of farmers	6.7	1.6	16.9	1.0	0.0
Groundnut	% of farmers	6.1	5.0	10.1	2.0	7.2
Betel Leaves	% of farmers	6.3	0.0	8.5	8.9	5.1
Onion	% of farmers	5.7	8.1	9.7	0.4	1.7
Betel Nut	% of farmers	4.7	0.2	0.0	6.3	27.6
Pigeon pea	% of farmers	4.4	4.4	8.7	0.7	0.0
Rubber	% of farmers	2.7	1.2	0.0	0.0	24.6
Tomato	% of farmers	4.2	14.2	1.9	0.3	1.0
Garlic	% of farmers	5.2	19.1	1.6	0.0	0.8
Chilli (fresh)	% of farmers	2.8	2.3	2.4	2.9	4.7

*: 4,845 farmers were interviewed but 22 percent of these farmers did not cultivate crops during the dry 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, dry season 2025.

During the 2025 dry season, 3,771 of the contacted farmers reported cultivating crops. The average cultivated area was 4.4 acres (median: 3.0 acres). Nationwide, 19 percent of crop farmers grew paddy, with the share rising to 36 percent in the Delta region. Other important dry season crops included sesame (13 percent), black gram (12 percent), green gram (8 percent), chickpea (7 percent), and groundnut (6 percent). Sesame, chickpea, and groundnut were particularly significant in the Dry Zone, where 33, 17, and 10 percent of farmers grew these crops, respectively. In addition to paddy and pulses, betel nut was an important crop in the Delta (6 percent for nuts and 9 percent for leaves) and in Coastal areas, where 28 percent of farmers cultivated betel nut. In the Coastal zone, 25 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 Q3/Q4 of 2025 to crop farmers who cultivated during the dry season, as well as in

[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).

previous MAPS rounds. At the national level, perceptions of security have improved slightly over the past year. However, it is important to note that the sample of farmers from the most insecure areas—such as Rakhine and Kachin—was small in the recent round, 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 75 percent three and a half years later. Nevertheless, this represents an improvement compared to last year, when only 69 percent reported residing in secure areas (Table 2). The proportion of farmers reporting insecure conditions was highest in the Dry Zone (31 percent) and Coastal areas (29 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
July/Sept 2024						
Very insecure	%	8.3	8.1	9.7	3.6	16.5
Somewhat insecure	%	22.4	24.5	25.3	16.4	23.5
Secure	%	36.0	37.6	35.0	35.3	37.0
Very secure	%	32.8	29.1	29.5	44.3	22.6
Prefer not to answer	%	0.5	0.8	0.5	0.3	0.4
Total	%	100.0	100.0	100.0	100.0	100.0
Aug/Oct 2025						
Very insecure	%	6.9	3.2	9.5	4.2	14.1
Somewhat insecure	%	17.8	17.3	21.7	14.2	15.1
Secure	%	32.9	34.2	34.4	29.7	33.0
Very secure	%	42.2	45.3	33.9	51.7	37.2
Prefer not to answer	%	0.3	0.0	0.5	0.2	0.6
Total	%	100.0	100.0	100.0	100.0	100.0

Source: Authors' calculations based on MHWS, round 1 and MAPS, rounds 6 and 7.

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, 19 percent of farmers reported that they could not move around without serious security concerns (Table 3). Mobility concerns were highest in the Dry Zone and Coastal areas. Farmers were also asked whether fields in their community were left uncultivated, burned or destroyed, or not harvested due to conflict. Nationally, 6 percent and 3 percent of farmers, respectively, indicated these issues occurred in their area—both slightly lower than last year. Not cultivating land due to conflict was most frequently reported in Coastal areas (8 percent). Land confiscation was mentioned by 1 percent of farmers, with the problem most prevalent in the Hills (3 percent). Finally, 8 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						
Aug – Sep 2022	%	25.0	20.9	31.4	15.7	48.4
Jul – Sep 2024	%	23.0	23.2	27.7	14.2	29.9
Aug – Oct 2025	%	18.7	11.8	25.6	13.6	25.5
Crops or fields were burnt or destroyed or not harvested because of conflict in the farmers' area						
Aug – Sep 2022	%	3.6	2.2	6.5	0.9	6.4
Jul – Sep 2024	%	4.5	2.1	7.7	0.8	10.5
Aug – Oct 2025	%	2.8	1.7	4.0	0.9	7.2
Fields were not cultivated in my area because of conflict						
Aug – Sep 2022	%	7.8	8.7	10.8	1.3	20.5
Jul – Sep 2024	%	7.4	5.4	10.6	1.5	19.1
Aug – Oct 2025	%	5.6	4.8	8.7	1.7	8.1
Agricultural land was confiscated in this community						
Aug – Oct 2025	%	1.1	2.6	0.8	0.3	0.9
Farmer is afraid of storing agricultural produce at his house because of risk of confiscation/destruction						
Aug – Oct 2025	%	7.8	2.2	16.3	2.9	5.8

Source: Authors' calculations based on MAPS, rounds 2, 6, and 7.

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 45 percent during the 2022 dry season to 31 percent in 2025, a drop of 14 percentage points. Among those who did not take credit, most reported that they did not need it. For those who accessed credit, the Myanmar Agricultural Development Bank (MADB) remained the primary source, serving 13 percent of cultivating farmers in the 2025 dry season. Other sources included input suppliers (7 percent) and relatives or friends (7 percent). Agricultural credit from microfinance institutions (MFIs) or NGOs was accessed by only 2 percent of farmers.

Regional differences in credit usage were significant. In the Delta, 42 percent of farmers used credit during the 2025 dry season, compared to just 22 percent in the Dry Zone. A substantial share of farmers in the Dry Zone (20 percent) and the Hills (12 percent) expressed willingness to take credit but were unable to obtain it. The Delta also had the highest proportion of farmers borrowing from MADB (25 percent), compared to 14 percent in Coastal areas and 9 percent in the Hills. In the Hills, MFIs/NGOs and revolving funds accounted for 3 percent and 6 percent of credit sources, respectively, while private money lenders served 5 percent of farmers.

Table 4. Use of credit

-	Unit	National	Hills	Dry Zone	Delta	Coastal
Farmer took credit						
Dry season 2025	%	31.2	34.7	22.4	42.2	19.8
Dry season 2024	%	33.5	35.2	23.4	46.3	25.1
Dry season 2023	%	41.6	43.4	31.7	51.1	34.4
Dry season 2022	%	45.4	43.0	37.3	56.1	40.2
If no credit taken, reasons						
Not needed (buy inputs in cash)	%	79.1	82.9	73.8	83.3	81.3
Tried to take credit, but could not find it	%	14.1	11.9	20.0	8.6	9.9
Conditions for credit not good (interest rates too high)	%	3.0	2.5	3.1	2.4	4.6
Did not pay back last year's credit		0.5	0.1	0.8	0.6	0.2
Lack of collateral	%	0.1	0.1	0.1	0.1	0.0
Other	%	5.5	3.8	5.6	6.7	5.3
If credit taken, sources						
Private money lender	%	3.6	5.3	2.8	3.8	1.1
Relatives/ Friend	%	6.7	4.4	9.1	6.5	2.9
MADB	%	13.2	8.8	6.2	24.8	14.1
Department of Cooperatives	%	0.3	0.8	0.2	0.1	0.4
Microfinance Institution/NGO	%	1.8	3.1	0.6	2.2	1.1
Rice or oil mill	%	0.1	0.1	0.0	0.3	0.0
Agricultural input suppliers	%	6.6	5.3	4.1	11.0	4.8
Agricultural trader (crops or crops + inputs)	%	1.7	3.9	0.3	1.9	1.3
Agricultural machinery suppliers	%	0.1	0.4	0.0	0.0	0.0
Private bank	%	0.4	0.7	0.5	0.2	0.0
Revolving fund (Mya Sein Yaung)	%	2.2	6.2	0.8	0.9	1.2
Other	%	1.3	3.1	0.6	0.8	1.3

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

Table 5 presents data on the use of agricultural extension and crop advisory services over the past four dry seasons. After a decline of 5 percentage points—from 39 percent of farmers in 2022 to 34 percent in 2024—usage rebounded to 38 percent in the 2025 dry season. Among those accessing extension services, the private sector was the main provider, serving 20 percent of farmers, followed by the public sector (11 percent) and NGOs (5 percent). Consistent with earlier findings (MAPSA 2024), digital agricultural extension services continue to gain traction. In 2025, 20 percent of farmers reported using digital extension, an increase of 3 percentage points from last year. Regionally, the Delta recorded the highest use of extension services overall (46 percent), compared to 30 percent in the Dry Zone. Adoption of digital extension was strongest in the Delta and Coastal areas, where 24 percent of farmers utilized these services.

Table 5. Use of extension services

	Unit	National	Hills	Dry Zone	Delta	Coastal
Farmer used any extension service						
Dry season 2025	%	37.8	38.4	29.7	46.0	40.7
Dry season 2024	%	34.3	37.3	27.0	42.0	30.3
Dry season 2023	%	36.1	31.2	31.7	43.0	37.2
Dry season 2022	%	38.9	39.4	33.4	44.5	36.4
Extension service used						
Public extension	%	11.4	11.9	7.1	13.3	20.7
If received, share in-person	%	87.7	89.7	79.8	90.2	90.4
If received, share digital	%	6.8	5.6	13.0	4.7	5.0
If received, share both	%	5.4	4.7	7.2	5.2	4.6
Private extension	%	20.1	20.5	16.4	26.4	12.9
If received, share in-person	%	88.1	85.3	84.7	91.9	89.8
If received, share digital	%	6.1	9.4	9.8	2.1	2.8
If received, share both	%	5.8	5.3	5.5	6.0	7.4
NGO	%	5.2	4.9	4.6	5.6	6.6
If received, share in-person	%	84.3	87.8	76.5	89.6	83.6
If received, share digital	%	7.1	3.1	14.9	3.8	2.9
If received, share both	%	8.6	9.1	8.6	6.6	13.6
Any cellphone application and internet	%	20.4	22.0	15.6	23.8	23.8

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

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 dry season, comparing 2024 and 2025. Farmers were asked whether they were unable to find any or enough of several key inputs. In the most recent dry season, no major availability issues were reported nationally; in most parts of the country, agricultural inputs were readily available—more so than in 2024. 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, down from 5 percent a year earlier. Problems with seeds and pesticides were even less common, and access improved compared to last year. Labor availability, however, remained a challenge: 17 percent of farmers reported difficulty finding enough laborers, slightly higher than in 2024. Labor shortages were most pronounced in the Delta, similar to the previous year. It's worth noting that the survey was conducted after the implementation of the Military Service Law, which likely contributed to labor constraints. Fertilizer shortages were more severe in Coastal areas, the Dry Zone, and the Hills.

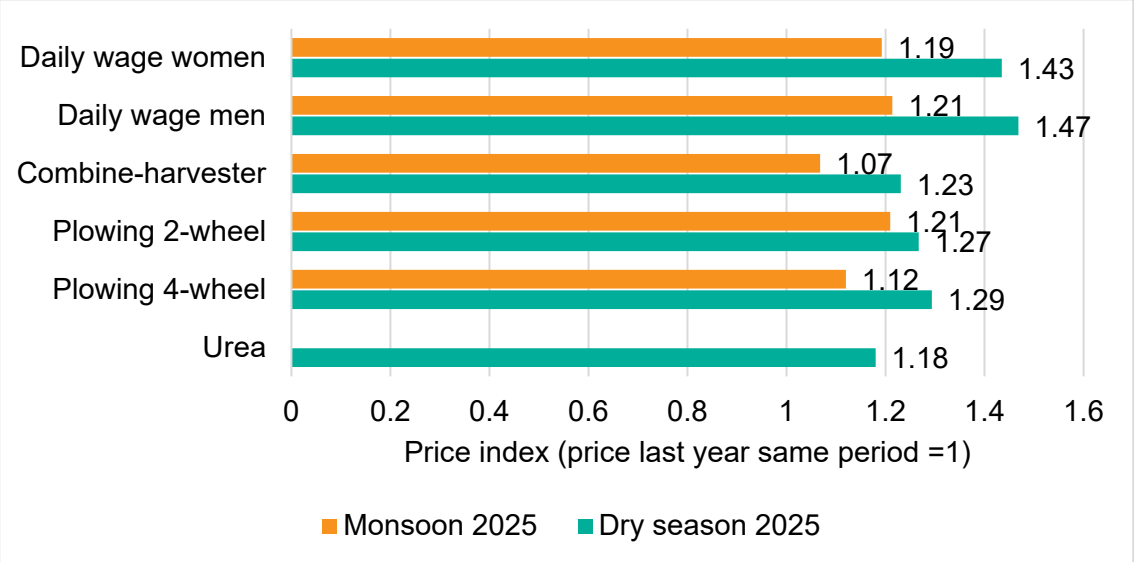
Table 6. Reported problems of availability of agricultural inputs (not available or not enough available) – Dry season 2024 and 2025

	Unit	National	Hills	Dry Zone	Delta	Coastal
Dry season 2025						
Chemical fertilizer	%	3.2	2.7	4.0	2.3	4.4
Seeds	%	3.0	6.9	1.3	2.1	2.5
Pesticides	%	1.4	1.0	2.0	0.8	2.0
Mechanization	%	3.4	2.9	3.4	3.6	4.4
Labor	%	17.2	15.6	15.6	20.9	14.7
Dry season 2024						
Chemical fertilizer	%	4.6	7.1	3.0	3.5	8.4
Seeds	%	4.5	7.9	2.9	3.0	7.4
Pesticides	%	3.4	4.3	3.5	2.0	5.4
Mechanization	%	3.8	5.4	3.4	3.9	1.1
Labor	%	16.5	15.9	14.3	18.8	18.6

Source: Authors' calculations based on MAPS, dry season 2024 and 2025.

Farmers were asked about changes in agricultural input prices over the past year, comparing dry season and monsoon periods. Substantial increases in input costs were observed during dry season cultivation. Urea—the most widely used fertilizer in the country—rose by 18 percent. Mechanized plowing charges also increased, with costs for two-wheel tractors up by 27 percent and four-wheel tractors by 29 percent. Wages for casual laborers surged significantly, rising by 47 percent for men and 43 percent for women (in nominal terms) during the dry season. In contrast, input cost changes during the 2025 monsoon season were smaller, reflecting the lower inflationary environment this year (World Bank 2025).

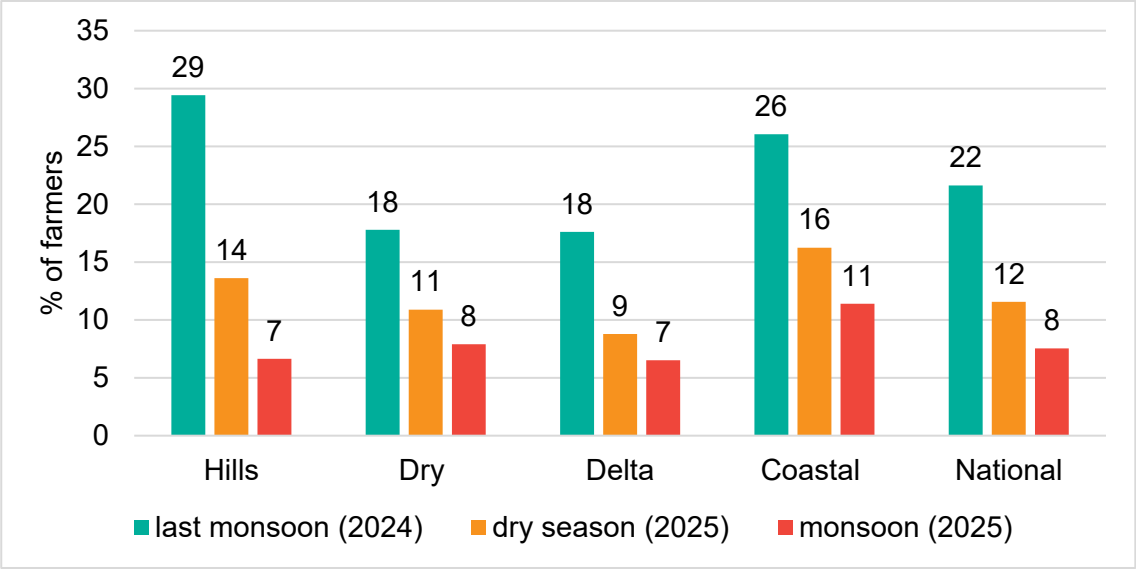
Figure 2. Price changes of agricultural inputs in the dry season and monsoon of 2025 (price one year earlier = 1)



Source: Authors' calculations based on MAPS, dry season 2025 and 2024.

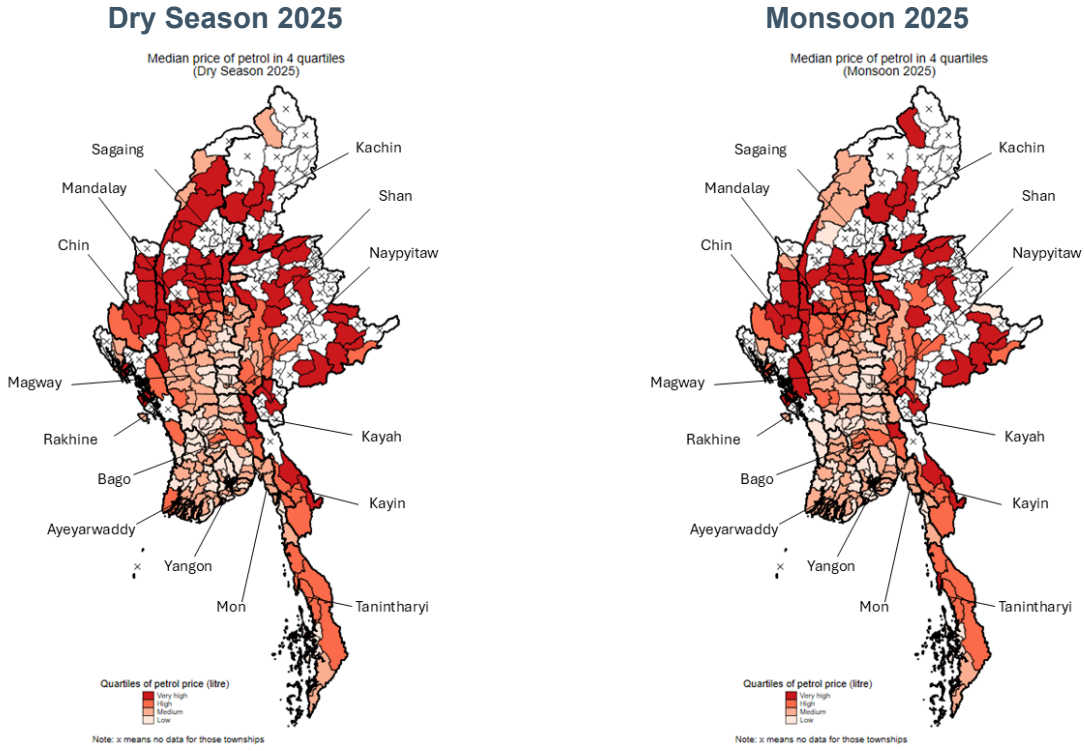
At the national level, 12 percent of farmers reported that fuel was unavailable or rarely available in their community during the 2025 dry season, compared to 8 percent during the 2025 monsoon. This lack of fuel complicated mechanization, irrigation, and other farming activities for affected farmers. However, the situation in 2025 was significantly better than during the 2024 monsoon (Figure 2). There is considerable variation in both fuel availability and fuel prices across the country (Figure 2 and Figure 3). High fuel prices and shortages are particularly severe in conflict-affected and remote areas. During the dry season, prices were especially high in Kayah, Rakhine, Chin, Kachin, and Kayin.

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



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

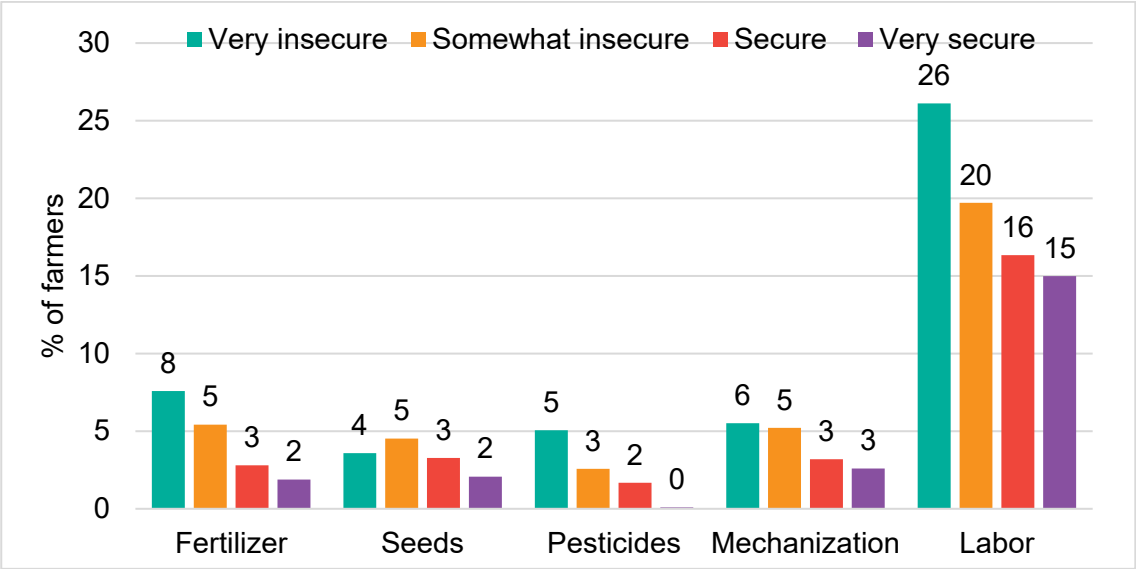
Figure 4. Fuel prices in the dry season of 2025 and monsoon 2025



Source: Authors' calculations based on MAPS, dry 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, 8 percent of farmers in "very insecure" areas reported lacking access to chemical fertilizer, compared to only 2 percent in the most secure areas (Figure 5). The largest differences across insecurity categories were observed for labor: 26 percent of farmers in very insecure areas reported labor shortages, versus 15 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, dry season 2025



Source: Authors' calculations based on MAPS, dry 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 a year earlier. Table 7 shows that average paddy prices fell by 15 percent, while median prices declined by 28 percent. This drop in rice prices appears linked to international trends—FAO's international rice price index fell by 24 percent between September 2024 and September 2025—as well as to a more stable exchange rate for the Kyat (the MMK/USD online rate was 4 percent higher in September 2025 compared to September 2024). Prices for most non-paddy crops also decreased substantially, including black gram (-12 percent), chickpea (-6 percent), groundnut (-8 percent), and pigeon pea (-27 percent). Vegetable prices, except for tomatoes, also fell sharply. The major exception was green gram, which saw a significant price increase of 53 percent.

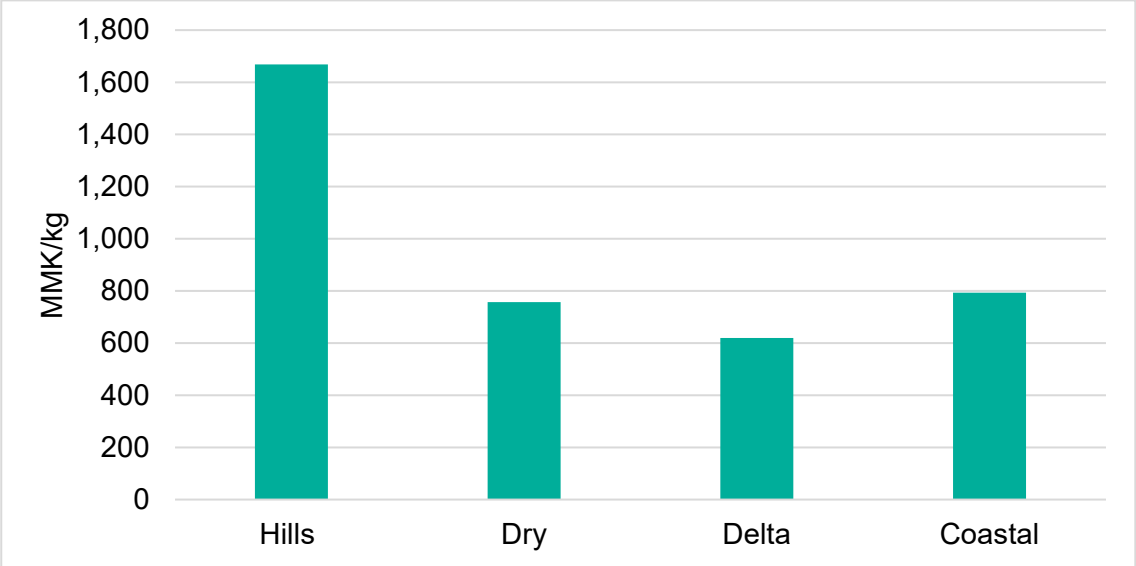
Table 7. Prices for main non-rice crops, Aug/Oct 2025 compared to a year ago (MMK/kg)

	Unit	2025	2024	% change
Paddy	Mean	769	902	-14.73
	Median	622	861	-27.78
Black gram	Mean	2,872	3,261	-11.94
	Median	2,905	3,272	-11.21
Green gram	Mean	3,424	2,240	52.84
	Median	3,333	2,141	55.71
Sesame	Mean	5,353	5,390	-0.69
	Median	4,082	5,306	-23.08
Chickpea	Mean	2,619	2,795	-6.30
	Median	2,556	2,716	-5.88
Groundnut	Mean	3,014	3,289	-8.36
	Median	2,632	3,246	-18.92
Betel Leaves	Mean	6,781	8,881	-23.64
	Median	6,135	5,521	11.11
Pigeon pea	Mean	2,740	3,770	-27.33
	Median	2,599	3,670	-29.17
Onion	Mean	710	1,205	-41.03
	Median	613	1,104	-44.44
Betel Nut	Mean	10,114	9,042	11.86
	Median	9,816	8,282	18.52
Garlic	Mean	2,743	5,942	-53.85
	Median	2,761	5,521	-50.00
Tomato	Mean	1,284	937	37.04
	Median	920	613	50.00

Source: Authors' calculations based on MAPS, round 6 and 7.

Figure 6 illustrates the wide variation in paddy prices across the country. Average prices at the agro-ecological zone level range from 619 MMK/kg in the Delta to 1,668 MMK/kg in the Hills— a difference of 170 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).

Figure 6. Paddy prices as reported by farmers, dry season 2025



Source: Authors' calculations based on MAPS, round 7.

7. CROP MARKETING AND CHALLENGES

Table 8 summarizes the share of farmers who attempted to sell crops during the dry seasons of 2024 and 2025, the main crops they intended to sell, and the marketing challenges they faced. Most farmers tried to sell their dry-season crops, but the proportion was slightly lower in 2025 (88 percent) compared to 2024 (93 percent). Paddy rice remained the top crop for sale, reported by 16 percent of farmers in both years. Other key crops included black gram (8 percent), green gram (5 percent), chickpea (5 percent), and oilseeds—primarily groundnut (3 percent) and sesame (6 percent).

There is considerable variation across agro-ecological zones. Rice dominated in the Delta (33 percent of farmers) but was far less important in the Hills (4 percent). In the Dry Zone, sesame (17 percent) and chickpea (13 percent) were most prominent, while in the Coastal region, betel nut (14 percent) and rubber (18 percent) were key sales crops.

Marketing challenges increased in 2025: 20 percent of farmers reported difficulties, up from 12 percent in 2024. Farmers in the Hills and Dry Zone faced the most problems. Among those reporting challenges, low crop prices were cited by 16 percent—double the share from last year—reflecting earlier price trends. High fuel and transport costs were another major constraint, mentioned by 13 percent of farmers compared to 8 percent last year. Issues such as insecurity during travel, lack of traders, market closures, and limited access to traders also became more prevalent than in 2024.

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

		2024	2025			
	Unit	National	National	Hills	Dry	Delta	Coastal
Tried to sell crop of dry season harvest	% yes	93.4	88.3	87.9	86.3	90.2	90.1
Main crop that they tried to sell							
Rice	%	16.5	15.8	3.5	11.3	32.9	5.4
Black gram	%	9.6	8.2	1.1	1.8	21.9	3.7
Sesame	%	4.0	6.4	0.0	17.2	0.9	0.0
Green gram	%	4.6	5.2	0.1	5.1	8.5	7.0
Chickpea	%	4.3	5.1	1.0	13.1	0.7	0.0
Groundnut	%	3.4	3.3	1.7	6.4	1.2	3.3
Betel Leaves	%	4.0	5.2	0.0	7.4	6.7	4.6
Pigeon pea	%	4.3	3.5	4.0	6.6	0.8	0.0
Onion	%	3.2	2.9	2.0	6.7	0.2	0.0
Tomato	%	2.8	2.8	10.4	0.8	0.2	1.0
Garlic	%	3.6	2.9	11.9	0.5	0.0	0.0
Betel Nut	%	0.9	1.8	0.0	0.0	1.5	14.0
Rubber	%	1.3	1.9	0.8	0.0	0.0	17.5
Chili (fresh)	%	1.9	0.7	0.4	1.0	0.8	0.0
Other crops	%	35.6	34.2	63.1	22.1	23.9	43.5
Challenges faced during marketing	% yes	12.3	20.1	24.0	22.3	17.1	12.5
Type of challenge							
Low prices for crops	% yes	8.9	16.4	19.1	17.9	14.3	11.4
High price of fuel / high transportation cost	% yes	7.6	12.5	15.8	14.8	9.1	7.6
Payment problems	% yes	3.7	5.0	5.9	5.7	3.7	4.1
Have to sell crops on credit	% yes	4.0	6.3	6.0	5.8	7.7	4.2
Markets are closed	% yes	3.9	5.4	6.8	6.0	4.0	4.2
Not many traders	% yes	7.1	11.1	13.1	12.4	9.4	7.6
Buyers or traders cannot reach the farm, or I cannot reach them	% yes	6.5	9.1	8.8	12.4	6.4	6.8
Insecurity during travel	% yes	4.9	6.4	4.7	10.9	3.0	5.5

Source: Authors' calculations based on MAPS, dry season, 2024 and 2025.

Finally, farmers were asked to estimate their overall sales income from crop farming compared to the same time a year earlier (Table 9). Results indicate a worsening of agricultural sales income. Forty-five percent of farmers reported lower incomes in the 2025 dry season compared to the previous year, with one-quarter experiencing declines of more than 20 percent. Only 28 percent reported an increase in sales income. There was considerable regional variation: 50 percent of farmers in the Delta reported lower sales incomes, compared to just 27 percent in Coastal areas. This disparity reflects crop price trends—rice and pulses, which dominate incomes in the Delta, saw significant price declines, while Coastal farmers benefited from price increases for betel nut and green gram, crops that are relatively important in that region.

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

	Unit	National	Hills	Dry	Delta	Coastal
Much lower now (by 20% or more)	%	24.7	23.7	25.5	27.8	14.2
Somehow lower now (between 1% and 20% lower)	%	19.7	17.7	21.1	21.5	13.1
About the same now	%	28.1	34.9	25.0	25.3	32.1
Somehow higher now (between 1% and 20% higher)	%	19.3	16.3	18.4	19.7	28.5
Much higher now (by 20% or more)	%	8.2	7.4	10.0	5.7	12.0
Total		100.0	100.0	100.0	100.0	100.0

Source: Authors' calculations based on MAPS, dry 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-five percent of farmers reported feeling "very insecure" or "insecure" during the survey period, while 19 percent indicated they could not move around without serious concern. Additionally, 6 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 1 percent of farmers reporting this as a problem in their community. Furthermore, 8 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 dry season, 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 18 percent compared to the previous dry season. Other input prices (mechanization, wages) increased even more. On the output side, prices for nearly all crops fell sharply, leading to reduced investments and 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 agricultural supply in 2025. This is particularly concerning for rice, pulses, and oilseed farmers. 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.

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