



## Wages of the Poor

### Insights from the Myanmar Household Welfare Survey in Q3/Q4 2025

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We assess the wage levels and food purchasing power of casual laborers, who are among the poorest segment of the population, using data from the Myanmar Household Welfare Survey (MHWS) collected in the second half of 2025, and compare these results with earlier survey rounds.

#### Key Findings

- Between October–December 2024 and July–October 2025, nominal urban construction wages increased by 25 percent (for both men and women), while nominal rural agricultural wages rose by 23 percent for men and 22 percent for women.
- Over the same period, prices of rice, the main staple, declined by 9 percent and the cost of a common diet changed very little.
- Real wages at the end of 2025 improved significantly compared to previous years and the value of wages relative to the cost of a common diet was higher than in the three preceding years, suggesting reduced vulnerability to food insecurity for casual laborers.
- The cost of a healthy diet was 50 percent higher than that of a common diet in Q3/Q4 2025. Over the entire 2022–2025 survey period, the cost of both diets has nearly tripled, rising by 187 percent for the common diet and 191 percent for the healthy diet.
- While real urban wages were significantly higher than rural wages in 2022, that difference has disappeared; real wages—measured in terms of a common diet—are now at similar levels in rural and urban areas.
- Casual laborers in Rakhine and Chin had the lowest purchasing power in 2025, underscoring the economic fragility of these states and the precarious circumstances faced by their populations.



#### Livelihoods and Food Security Fund



## Introduction

This research note examines changes in food prices and their effects on the cost of common and healthy diets, as well as on the food purchasing power of casual workers' wages—a timely, accurate and cost-effective way of monitoring food affordability for key segments of Myanmar's poor population.<sup>1</sup> Data on food prices and casual wage levels were collected through interviews with food vendors in rural and urban areas across Myanmar between December 2021 and October 2025 as part of the ongoing Myanmar Household Welfare Survey (MHWS).

## Data

IFPRI collects food prices and wages in the MHWS—a large-scale panel survey conducted by phone (covering approximately 12,000 to 13,000 households per round) in rural and urban areas and in all state/regions of Myanmar. To date, nine rounds have been completed covering the period from December 2021 to October 2025.<sup>2</sup> The most recent round was conducted between July and October 2025. Conflict-related disruptions to communication infrastructure posed significant challenges during the latest round. As a result, the samples for Rakhine and Kachin are not fully representative at the state level.

Respondents who report having household businesses that sell food (mobile or fixed food vendors, as well as food traders, brokers, or wholesalers) are selected to participate in a food vendor module. Vendors are asked to report prices for the cheapest available variety of ten types of common foods: rice, potatoes, pulses, chicken, fresh fish, dried fish, green leafy vegetables, onions, bananas, and oils. All MHWS respondents are also asked to report rice prices and casual wage levels paid to men and women in their communities.

## Food Price between Q4 2024 and Q3/Q4 2025

Table 1 summarizes changes in median food prices between Q4 2024 and Q3/Q4 2025. Most food items experienced substantial price changes during this period. Rice prices declined by an average of 9 percent, a trend linked to falling international rice prices<sup>3</sup> and relative exchange rate stability over the past year.<sup>4</sup> Prices for other staple foods also decreased, with onions showing the largest drop—down 45 percent—apparently due to limited export opportunities in 2025. In contrast, animal-sourced foods saw significant price increases: chicken meat rose by 26 percent and fresh fish by 36 percent compared to Q4 2024. These hikes appear to be driven by higher costs for animal feed, veterinary medicines, and transportation.<sup>5</sup>

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<sup>1</sup> Headey D, Bachewe F, Marshall Q, Raghunathan K, Mahrt K. Food prices and the wages of the poor: A cost-effective addition to high-frequency food security monitoring. *Food Policy*. 2024 May 1;125:102630.

<sup>2</sup> For more information on the MHWS refer to the following reference: Myanmar Agriculture Policy Support Activity (MAPSA). 2022. Phone surveillance, from scratch: Novel sample design features of the nationally representative Myanmar Household Welfare Survey (MHWS). Myanmar SSP Working Paper 16. Washington, DC: International Food Policy Research Institute (IFPRI).

<sup>3</sup> See <https://www.fao.org/markets-and-trade/commodities/rice/fao-rice-price-update/en/>

<sup>4</sup> World Bank. 2025. Myanmar Economic Monitor: Surviving, not thriving. December 2025. Washington, DC: World Bank.

<sup>5</sup> Minten, B., Aung, N., Aung, Z.W., Htar, M.T. 2025. Understanding recent price increases of animal-source foods in Myanmar. Myanmar SSP 126. Washington, DC: International Food Policy Research Institute (IFPRI).

**Table 1. Changes in median food prices (%), October/December 2024 (Q4 2024) to July/October 2025 (Q3/Q4 2025)**

	Oct/Dec '24 vs July/Oct '25
Rice	-8.9
Potatoes	-31.9
Oil	-7.9
Pulses	-3.4
Chicken	26.3
Fresh Fish	36.2
Dried Fish	17.9
Leafy Greens	-6.8
Onions	-45.4
Bananas	4.5

Sources: MHWS (Round 8-9) phone surveys

### Healthy and common diet food baskets between January 2022 and October 2025

Changes in the prices of individual food items do not provide a clear picture of changing food costs faced by households. Therefore, changes in household food costs are calculated by comparing the cost of a fixed basket of foods between periods. We consider the evolving cost of two food baskets – based on the ten types of common foods – to understand the evolving costs faced by households with typical consumption patterns compared to the costs of acquiring a balanced and healthy diet:<sup>6</sup>

1. **Common diet basket:** average regional quantities consumed of foods representative of vendor survey foods as reported by households surveyed in the 2015 Myanmar Poverty and Living Conditions Survey (MPLCS)
2. **Healthy diet basket:** average regional quantities consumed of the same foods aligned with a recommended healthy diet<sup>7</sup>

Staple foods (mainly rice) account for more than two-thirds of dietary energy in the common diet compared to just over half in the healthy diet.

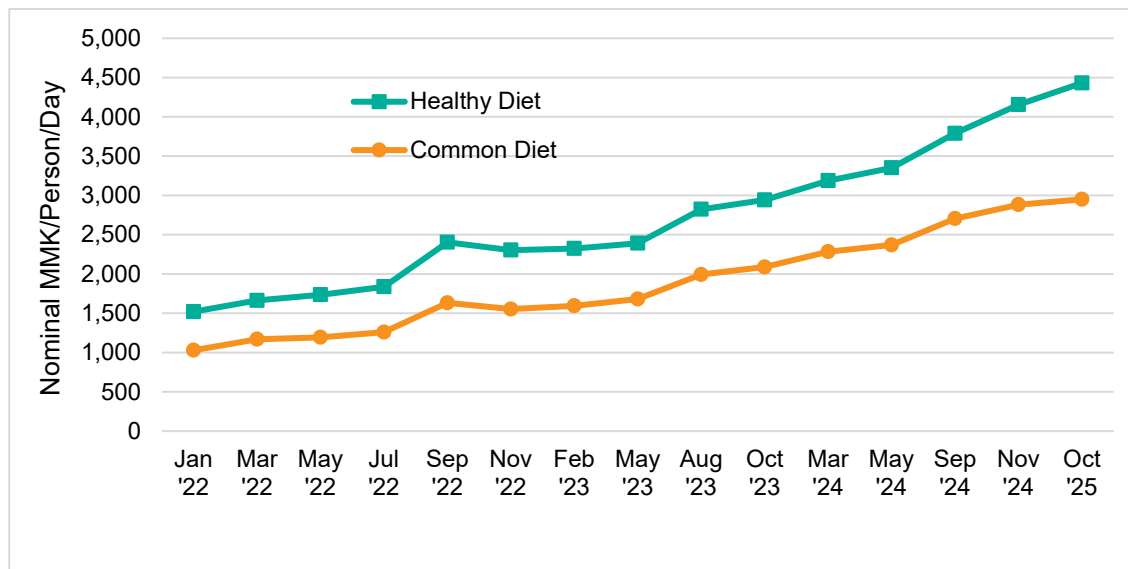
Figure 1 presents the costs of these two diets. **The cost of the healthy diet was significantly higher—50 percent more than the common diet in Q3/Q4 2025 (4,431 kyat versus 2,950 kyat).** Despite notable differences in their composition, the costs of both diets followed remarkably similar trends over time, increasing at comparable rates in most survey rounds. In the most recent round, food price inflation was relatively modest compared to earlier rounds. **The cost of the common diet—based on the cheapest food varieties and thus reflecting the costs faced by households purchasing the lowest-priced foods—barely increased relative to the end of 2024, indicating improving affordability of such diets. By contrast, the cost of a healthy diet rose by 7 percent.** This widening gap reflects divergent price trends between animal-sourced foods and crop-based staples, signaling growing affordability challenges for healthy diets. **Over the full 2022–2025 survey**

<sup>6</sup> We evaluate the cost of these two stylized diets using the limited items in the vendor surveys with the aim of tracking changes in healthy diet costs, rather than providing a nuanced estimate of costs faced by households of varying compositions. For a more complete price inflation index – including food and non-food prices – see World Bank. 2025. Myanmar Economic Monitor: Surviving, not thriving. December 2025. Washington DC: World Bank.

<sup>7</sup> Healthy diet guidelines are adapted for an adult woman from the Myanmar food based dietary guidelines for pregnant and lactating women applied to the foods in the vendor surveys in proportions reported in the 2015 MPLCS. Zaw, H.M.M., C.M Thar, and W.T.K. Lee. 2022. Myanmar food-based dietary guidelines for pregnant and lactating women. Nay Pi Taw, Myanmar: FAO. The healthy diet methodology is based on work by Herforth and co-authors (Herforth, A., Y. Bai, A. Venkat, K. Mahrt, A. Ebel, and W.A. Masters. 2020. Cost and affordability of healthy diets across and within countries. Background paper for the State of Food Security and Nutrition in the World 2020. Rome: FAO.)

period, the cost of both diets nearly tripled, increasing by 187 percent for the common diet and 191 percent for the healthy diet.

Figure 1. National trends in the cost of healthy and common diets, Q1 2022 to Q3/Q4 2025



Sources: MHWS (Round 1-9) phone surveys

### Diet-adjusted casual wage rates

This section estimates the purchasing power of poor and vulnerable populations by examining the ratio of casual wages to the cost of common diet baskets, as well as the amount of rice (in kilograms) that an individual worker can buy with a day's wage. Specifically, the MHWS asks respondents to report daily wages for male and female construction and agricultural workers in their communities.

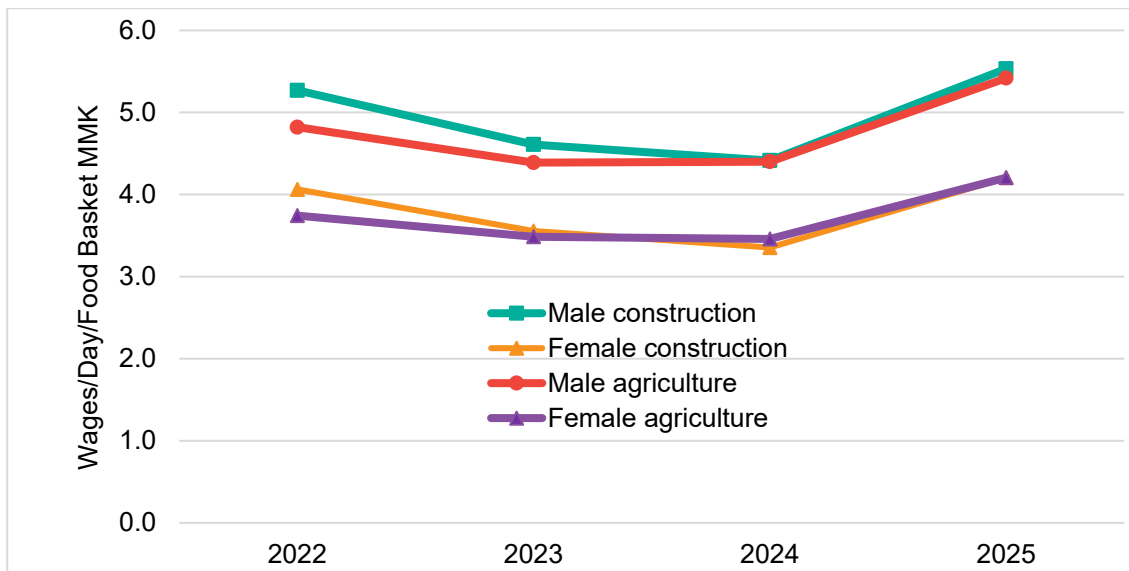
Between October–December 2024 and July–October 2025, nominal urban construction wages increased by 25 percent for both men and women, while nominal rural agricultural wages rose by 23 percent for men and 22 percent for women (Figure 2). During the same period, common diet costs remained largely unchanged. Consequently, **the purchasing power of daily wages relative to common diet costs improved significantly. By the end of 2025, the value of wages relative to the cost of a simple diet was higher than during the previous three years (Figure 3).**

**Figure 2. Nominal wages in construction and agriculture for men and women, Q1 2022 to Q3/Q4 2025**



Sources: MHWS (Round 1-9) phone surveys

**Figure 3. Diet adjusted (end-of-year) wage rates in construction and agriculture for men and women, Q4 2022 – Q3/Q4 2025**

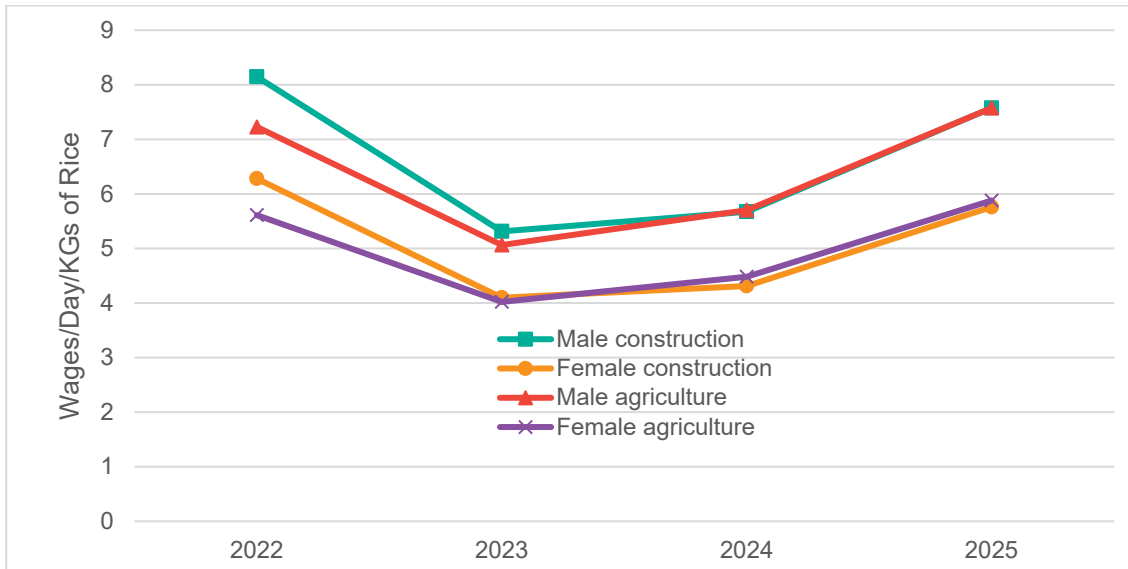


Sources: MHWS (Round 1-9) phone surveys

When adjusted for the cost of one kilogram of rice, urban construction wages increased by 33 percent between Q4 2024 and Q3/Q4 2025, while rural agricultural wages rose by 33 percent for men and 31 percent for women (Figure 4). Wages relative to rice prices at the end of 2025 were higher than in 2023 and 2024 and comparable to those at the end of 2022.

These trends indicate a notable improvement in real wages and food affordability compared to previous years, suggesting reduced vulnerability to food insecurity for casual laborers.

**Figure 4. Rice (1 kg) adjusted (end-of-year) wage rates in construction and agriculture for men and women, Q4 2022 – Q3/Q4 2025**

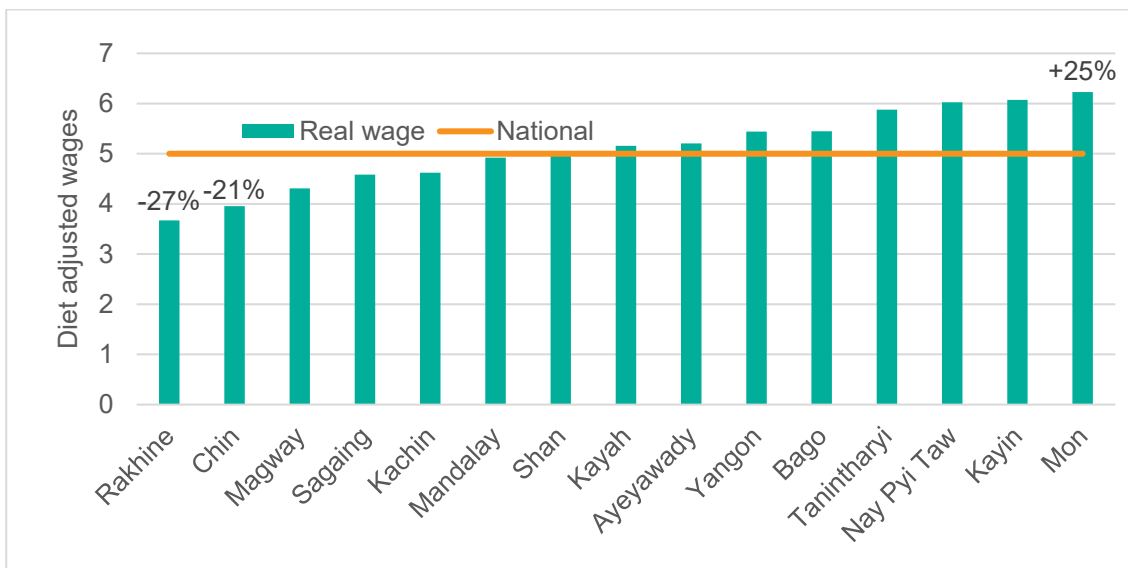


Source: MHWS (Round 1-9) phone surveys

Note: The figures show rural agricultural wages and urban construction diet adjusted wages. Diet adjusted wages are the ratio of daily wage rates to the cost of the common diet basket and one kilogram of the cheapest available rice.

We also compare diet-adjusted wage rates by state and region (Figure 5). **Real wages are lowest in the most conflict-affected states in central and western Myanmar.** In Rakhine, casual wage workers earn real wages that are 27 percent below the national average. In contrast, purchasing power is highest in the eastern states of Mon and Kayin, possibly due to easier migration opportunities to Thailand from these areas.

**Figure 5. Diet adjusted wage rates by state/region, Q3/Q4 2025**



Source: MHWS Round 9 phone survey

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## ABOUT THE AUTHORS

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