



## Livelihoods and Welfare

### Findings from the Eighth Round of the Myanmar Household Welfare Survey (October – December 2024)

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The eighth round of the Myanmar Household Welfare Survey (MHWS), a nationally and regionally representative phone survey, was conducted between October and December 2024, with a recall period covering July to December. It builds on seven rounds implemented since December 2021. This report presents key findings on the livelihood and welfare dynamics during the second half of 2024.

#### Key Findings

- Between 2023 and 2024, household welfare measured by median real household income per adult equivalent declined slightly by 0.8 percent, but real income in 2024 is 15.8 percent lower than two years ago.
- The poverty headcount rate rose to 70.5 percent in the second half of 2024, slightly lower than 71.7 percent in 2023 but significantly higher than 65.2 percent in 2022. Wage-earning households remain the most vulnerable, with the lowest median real daily income and the highest poverty levels, particularly in conflict-affected states such as Kayah (91.2 percent), Chin (83.3 percent), and Rakhine (79.4 percent).
- Urban poverty increased by 6.9 percentage points over the past year and 15.2 percentage points over the past two years, while rural poverty fell by 4.3 percentage points in the past year and rose by 1.5 percentage points over two years.
- Falling wages and access issues were key challenges for wage and salaried workers while high input costs and low supply affected enterprises and crop producers. Market access and transportation issues were challenges for crop sales.

#### Recommended Actions

- Facilitate safe and productive migration opportunities and strengthen remittance systems to enhance household resilience and keep families out of poverty, as remittance income reduces the likelihood of poverty by 20 percentage points.
- Establish and expand social protection systems and safety nets to support vulnerable households, addressing the welfare impacts of escalating conflict, macroeconomic challenges, and the lack of critical state-provided services.



#### Livelihoods and Food Security Fund



## Introduction

Myanmar is facing a deeply challenging economic and humanitarian situation, marked by the compounding effects of conflict, natural disasters, and macroeconomic instability. A 7.7-magnitude earthquake in March 2025 caused widespread damage to infrastructure and intensified existing vulnerabilities, particularly in already high-poverty regions like Mandalay and Sagaing<sup>1</sup>. Ongoing political instability, electricity shortages, inflation exceeding 25 percent, and currency depreciation have disrupted livelihoods, increased food insecurity, and weakened labor markets. Over 14 million people now face acute food insecurity, and poverty is estimated to be on the rise in 2024-25. Enterprises struggle with input shortages, shrinking demand, and transport barriers, while wage workers confront falling incomes and limited employment opportunities. With GDP contracting by 1 percent in FY2024/25 and only modest growth projected, the outlook remains fragile<sup>2</sup>. These crises have severely disrupted livelihoods and welfare, with vulnerable populations, particularly rural households and displaced communities, facing heightened risks and limited access to basic services.

This paper provides an overview of the livelihoods and welfare of households across Myanmar for the eighth round of the Myanmar Household Welfare Survey (MHWS), a nationally and sub-nationally representative phone survey.<sup>3</sup> Conducted between October and December 2024, the MHWS monitors household and individual welfare indicators such as wealth, livelihoods, food insecurity, diet quality, health shocks, and coping strategies. There are currently eight rounds of the MHWS conducted from December 2021 to December 2024 across more than 12,000 households in 310 townships of Myanmar. 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 covers the time spanning from July to December 2024.

It is important to note that the estimates presented in this report are likely underestimates of the true situation on the ground, particularly in states affected by high levels of conflict and disruptions to electricity and telecommunications infrastructure. In regions such as Kayah, Kachin, and Rakhine, ongoing violence and damage to electricity and telecommunications infrastructure have severely limited our ability to reach populations most impacted by conflict and economic shocks. As a result, Round 8 sample sizes in these areas were below target. Conversely, we now have a larger sample of urban households, allowing for more statistically robust estimates of trends in urban areas.

## Livelihood Trends

**About 12.3 percent of salaried, farm and non-farm wage workers reported reduced working hours or less work as their main challenge in the three months preceding the survey in Q4 2024**, compared to 17.6 percent a year earlier (Table 1). This challenge declined in both rural and urban areas. While reduced working hours were still the largest challenge faced by salaried/wage workers, a growing share, 8.8 percent of wage/salaried workers, reported low/reduced wages as their principal challenge compared to the previous year. The percentage of households reporting this issue increased in both urban and rural areas. While nationally, 5.2 percent of wage/salary workers reported it was unsafe to travel to or at their work location, this figure reached 29.3 percent of wage/salary workers in Chin. In Kayah and Shan, 24.0 percent and 19.6 percent of wage-earning households reported less work and reduced working hours as their most important challenge,

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<sup>1</sup> According to findings from MHWS, in Quarter 4 of 2024, Mandalay and Sagaing had a poverty rate of 70.8 and 76.3 percent, respectively.

<sup>2</sup> World Bank (2025). Macro Poverty Outlook / 10 April 2025

<sup>3</sup> Lambrecht I, van Asselt J, Headey D, Minten B, Meza P, Sabai M, et al. (2023) Can phone surveys be representative in low- and middle-income countries? An application to Myanmar. PLoS ONE 18(12): e0296292. <https://doi.org/10.1371/journal.pone.0296292>

respectively. Kachin (16.6 percent) and Rakhine (13.6 percent) had the largest share of households reporting low/reduced wages.

**For non-farm enterprises, 16.6 percent reported high prices of raw materials as their main challenge in Q4 2024, up from both the second half of 2023 and 2022** (Table 1). The number of businesses reporting fuel/transportation issues increased from 5.8 percent to 7.9 percent between the last quarter of 2023 and 2024. **A growing issue is acquiring enough raw materials/supplies (7.5 percent), an increase from the previous year.** Meanwhile, low demand or customer access issues reduced significantly compared to the previous year. Spatially, high input costs were a significant issue in Rakhine (47.2 percent), Nay Pyi Taw (39.0 percent) and Tanintharyi (37.5 percent) while low demand was an issue in Kachin (27.6 percent), Sagaing (21.1 percent), and Rakhine (20.3 percent).

**Table 1. Most important challenges affecting different occupational categories, by rounds**

	Q4 2022	Q4 2023	Q4 2024
<b>Most important challenges for wage incomes or salary</b>			
No difficulty	57.7	61.6	66.7
Reduced working hours / less work	20.9	17.6	12.3
Low/reduced wages	6.8	7.3	8.8
Late payment of wages/income	2.3	1.3	1.1
Health-related or household constraints	2.3	2.4	2.3
Safety or security concerns (travel or workplace)	6.8	5.8	5.2
Transportation and access issues	3.2	3.7	3.6
<b>Most important challenges for farm or non-farm enterprises</b>			
No difficulties	40.8	43.7	45.6
High price of raw materials	16.3	16.9	16.6
High fuel/transport costs	6.8	5.8	7.9
Not able to acquire enough raw materials	4.9	5.0	7.5
Low demand or customer access issues	21.7	21.4	14.2
Financial and credit-related challenges	6.2	5.2	3.8
Labor or infrastructure problems	3.3	2.1	3.1

**Note:** Q4 2022 refers to July 2022–December 2022; Q4 2023 refers to June 2023–November 2023 Q4 2024 refers to July–December 2024. From the options in the questionnaire on most important challenges for wage incomes or salary, Health-related or household constraints combines unable to work due to health problems of worker or household members; Safety or security concerns (travel or workplace) combines not safe to travel to work location, not safe at work location; Transportation and access issues combines not able to reach work location, high transportation costs. From the options in the questionnaire on most important challenges for farm or non-farm enterprises, Low demand or customer access issues combines fewer/no customers, customers cannot reach my business or I cannot reach them; Financial and credit-related challenges combines difficult to reclaim debts/customers buying on credit, disruption to banking services or access to cash/loans; Labor or infrastructure problems combines difficulties hiring workers, electricity/energy supply problems.

**The main challenges that farmers reported facing in Q4 2024 (i.e. recall period between July and December 2024) were weather- and water-related problems<sup>4</sup> (27.8 percent) and high prices of, or lack of access to, inputs or mechanization (14.8 percent)** (Table 2). Compared to the second half of 2023, fewer households reported facing difficulties in farming and significantly fewer farmers faced issues with input prices. However, high prices or lack of access to inputs, fuel, or mechanization remained a considerable issue in Kachin, Rakhine, and Shan, faced by 43.8, 33.3 and 20.2 percent of farmers, respectively. Issues with pests/diseases (10.3 percent) decreased

<sup>4</sup> Typhoon Yagi impacted Myanmar in September 2024, causing widespread flooding and significant damage across the country.

slightly, but were quite high among farmers in Mon and Kayin at 32.1 and 24.4 percent, respectively. Finally, weather conditions negatively impacted crop production the most in Magway (36.1 percent of farmers), and Yangon (35.7 percent of farmers), followed by Bago (30.7 percent).

**The main issues farmers reported in selling their crops were low prices or limited buyers for crops (13.3 percent) and market access or transportation issues (7.7 percent) (Table 2).** These were significant and growing concerns for crop producers in urban areas. Low prices or limited buyers for crops became a significant issue in Nay Pyi Taw, Rakhine, and Kachin, where 23.7, 21.4 and 19.2 percent of farmers reported this issue, respectively. Market access and transportation issues were a huge problem for farmers in Chin (29.0 percent) and Kachin (26.4 percent).

**Table 2. Most important challenges for crop production and sale, by survey rounds**

	Q4 2022	Q4 2023	Q4 2024	Q4 2024 Rural	Q4 2024 Urban
<b>Most important challenges for crop production</b>					
No difficulties	28.9	41.1	41.8	42.4	28.0
High prices or lack of access to inputs or mechanization	31.2	16.1	14.8	14.4	25.1
Weather or water-related problems	24.3	23.4	27.8	27.4	35.7
Pest, disease, or labor issues	10.6	13.8	10.3	10.5	6.1
Access and logistical disruptions	4.9	5.4	2.7	2.6	4.7
<b>Most important challenges for crop sale</b>					
No difficulties	79.0	76.6	77.8	78.4	64.5
Low crop prices or limited buyers	14.9	16.5	13.3	12.9	22.1
Market access and transportation issues	5.3	6.6	7.7	7.5	13.3
Payment or transaction problems	0.8	0.4	0.2	0.2	0.2

**Note:** Q4 2022 refers to July 2022–December 2022; Q4 2023 refers to June 2023–November 2023 Q4 2024 refers to July–December 2024. Options for challenges for crop productions, High prices or lack of access to inputs, fuel, or mechanization combines high prices of inputs or mechanization, high prices of fuel, unable to acquire enough inputs or mech; Weather or water-related problems combines weather problems, water/irrigation supply problems; Pest, disease, or labor issues combines pest and disease problems, difficulties hiring workers; Access and logistical disruptions combines: disruption to banking services/access, I cannot reach my own farm.

## Real Income Trends

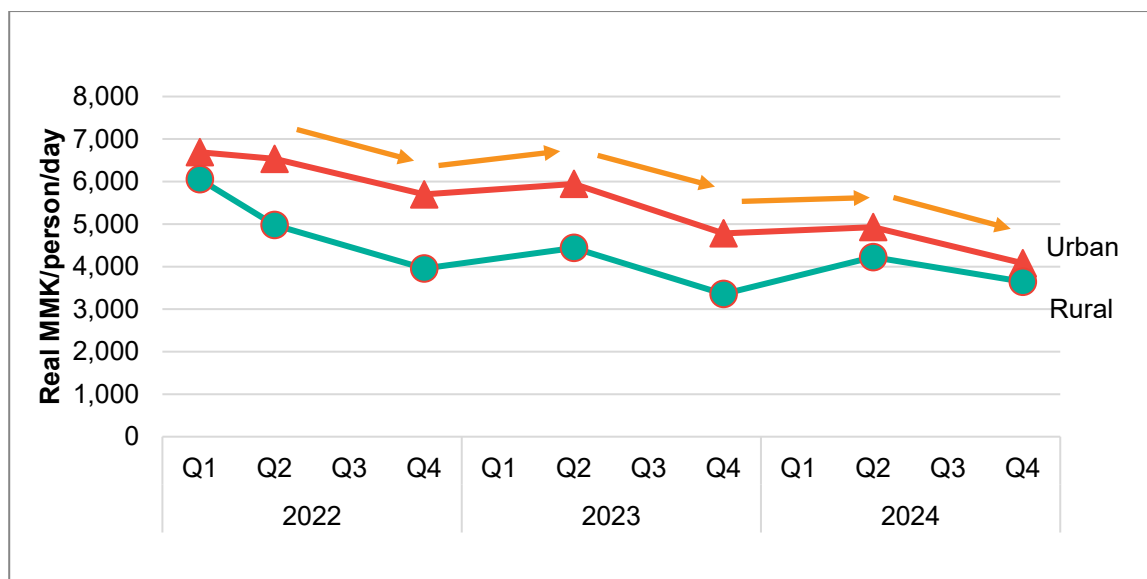
Real income is the value of income after adjusting for food inflation and provides a measure of the purchasing power of income over time. Real daily income per adult equivalent is presented in terms of the value of the MMK in Q4 2024.

**Between Q4 2023 and Q4 2024, the real value of median household income actually increased by 8.6 percent in rural areas, but it fell by 14.7 percent in urban areas.** Over this period, nominal median income rose by 50.4 percent in rural areas and 18.2 percent in urban areas. However, food costs increased by 39 percent. This meant that food prices outpaced income gains in urban areas, meaning that the purchasing power of urban household income declined (Figure 1).

**Over the survey period from Q1 2021–Q4 2023, inflation-adjusted income exhibited a seasonal pattern, tending to fall between Q2 and Q4, then modestly rising between Q4 and Q2 in the subsequent year.** This cyclical pattern emerges from high food inflation exceeding gains in nominal income between Q2 and Q4, a period associated with the end of the lean season in which most of survey interviews would be completed prior to sales of major harvests. In contrast, between Q4 and Q2, gains in nominal income exceed moderate increases in food costs. However, from Q4

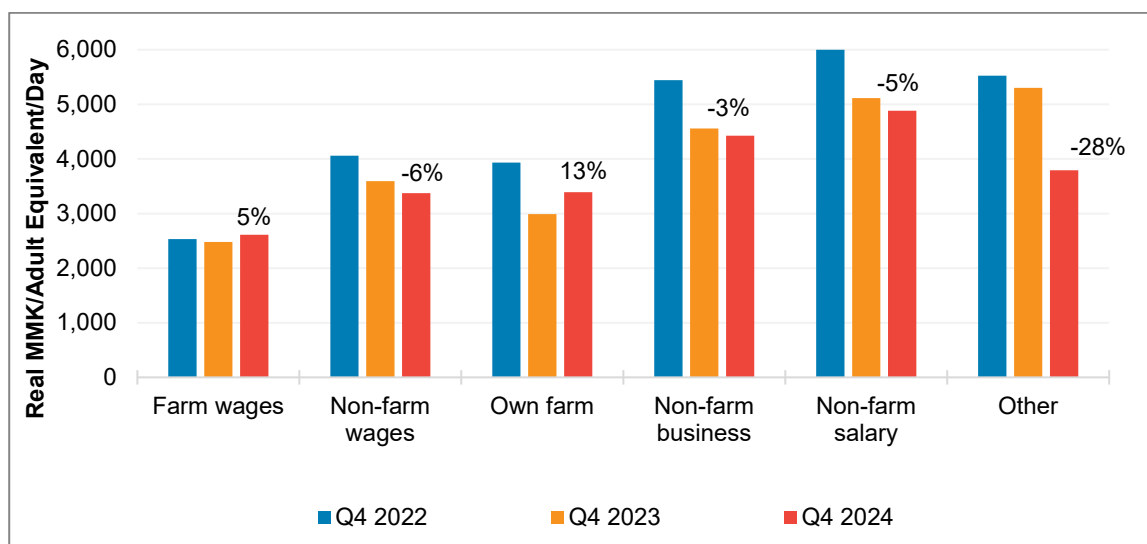
2023 to Q4 2024, this pattern flattened, with nominal income not keeping pace with ever-rising food costs.

**Figure 1. Inflation-adjusted “real” median household income in the past 30 days (MMK/adult equivalent/day), by location and survey round**



Note: Real income is adjusted for spatial differences and temporal differences in food costs and is presented in Q4 2024 MMK. Quarters correspond to the income recall period in each survey round. Q1 2022 refers to November 2021–February 2022; Q2 2022 refers to March 2022–June 2022; Q4 2022 refers to September 2022–December 2022; Q2 2023 refers to February 2023–June 2023; Q4 2023 refers to August 2023–November 2023; Q2 2024 refers to March–July 2024; Q4 2024 refers to October–December 2024. Source: Author’s calculations based on MHWS data.

**Figure 2. Median inflation-adjusted household income in the past 30 days (real MMK/adult equivalent/day), by primary livelihood and survey round**



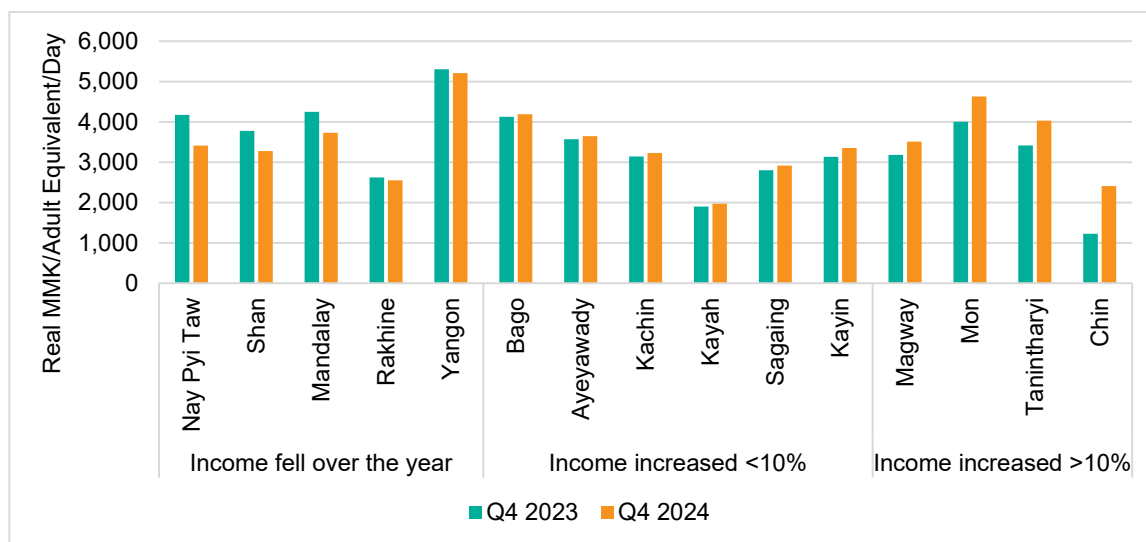
Note: Real income is adjusted for spatial differences and temporal differences in food costs and is presented in Q2 2024 MMK. Quarters correspond to the income recall period in each survey round. Q4 2022 refers to September 2022–December 2022; Q4 2023 refers to August 2023–November 2023. Q4 2024 refers to October–December 2024. The estimate in the figure is the percentage change of income from Q4 2023 to Q4 2024. Source: Author’s calculations based on MHWS data.

**Between Q2 2023 and Q2 2024, inflation-adjusted income from non-farm wages, non-farm businesses, non-farm salaries, and other income sources declined by 6.2, 2.9, 4.5, and 28.4 percent, respectively, while inflation-adjusted income earned from farm wages and household farming rose by 5.2 and 13.4 percent, respectively (Figure 2). The 13.4 percent increase in farm income reflects farm households benefiting from large increases in food output**

prices. Between Q4 2023 and Q4 2024, median retail rice prices – the major crop in Myanmar - reported in the MHWS rose by 21.1 percent. The 5.2 percent increase in farm wage income likely reflects ongoing labor shortages and strong demand for farm labor due to high rice prices, since crop agriculture is a large and highly labor-intensive sector.

**With regard to states/regions, Nay Pyi Taw, Shan, Mandalay, Rakhine, and Yangon had lower real income levels**, possibly due to a combination of conflict and high prices driven by supply chain disruptions while states such as Bago, Ayeyarwady and Kachin stable or slightly increasing real incomes. (Figure 3).

**Figure 3. Median inflation-adjusted household income in the past 30 days in March-July 2024 (real MMK/adult equivalent/day), by state/region**



Source: Author's calculations based on MHWS data. Q4 2023 refers to August 2023–November 2023 Q4 2024 refers to October–December 2024.

## Income Poverty

### Descriptive Analysis

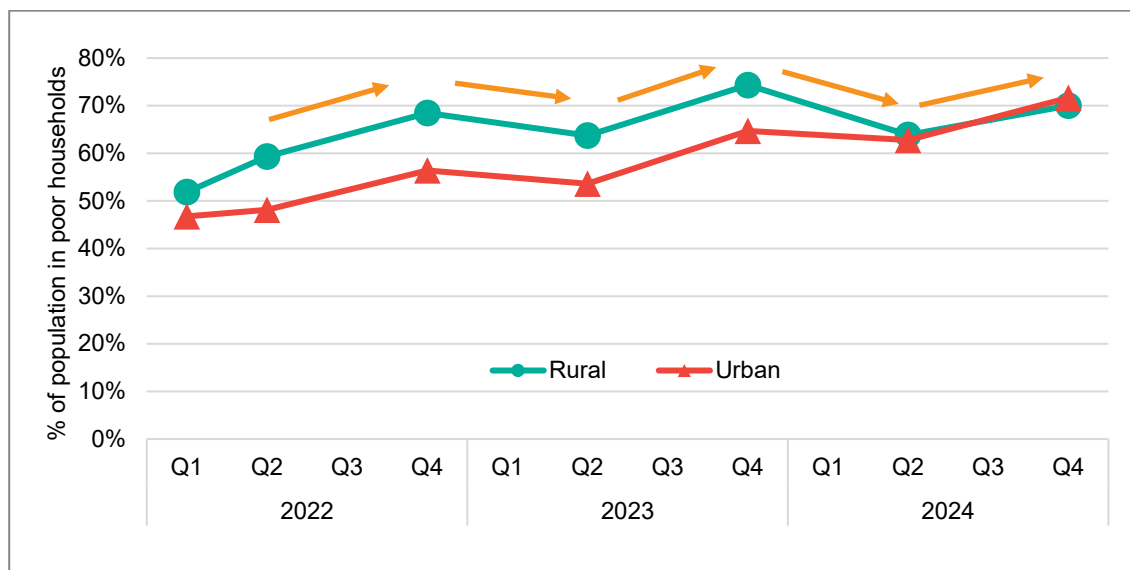
**Adjusted in accordance with food inflation, the poverty line – the cost of a basic needs bundle of goods and services – increased by 21.7 percent between Q2 2024 and Q4 2024 and by 183.0 percent between Q4 2023 and Q4 2024.**

Households are defined as poor when nominal household income per adult equivalent is lower than the poverty line. As with real income, we find income poverty rates follow a similar seasonal pattern, rising between Q2 and Q4 in each year and falling between Q4 and Q2 in the subsequent year (Figure 4). Between Q4 2022 and Q2 2023, the poverty rate was 63.7 percent in rural areas, but this rose to 74.3 percent between Q2 and Q4 2023 before falling again to 63.9 percent between Q4 2023 and Q2 2024. It rose to 70.0 percent again between Q2 and Q4 2024. On the other hand, urban poverty trends were less seasonal, with the headcount poverty being 53.6 percent, 64.7 percent and 62.8 percent over the same periods. **However, urban poverty worsened much more between Q2 and Q4 2024, rising to 71.6 percent.**

To net out seasonal effects on income, we combine data from Q2 and Q4 in each survey year. This pooled sample thus contains data from both the lean season and a relatively more prosperous harvest period. Comparing similar pooled periods in 2022, 2023, and 2024, national income-poverty rose by 5.6 percentage points from 60.7 percent in 2022 to 66.3 percent in 2023, while it rose by 0.8 percentage points from 66.3 percent in 2023 to 67.1 percent in 2024 (Figure 5). The rise in pooled

income-poverty was considerably higher in urban areas compared to rural areas with pooled poverty rising by 15.1 percentage points in urban areas from 2022 to 2024 but only 3 percentage points in rural areas over the same two-year period. **As a result, the urban/rural poverty gap narrowed between 2022 and 2023, while it was completely eliminated by 2024.**

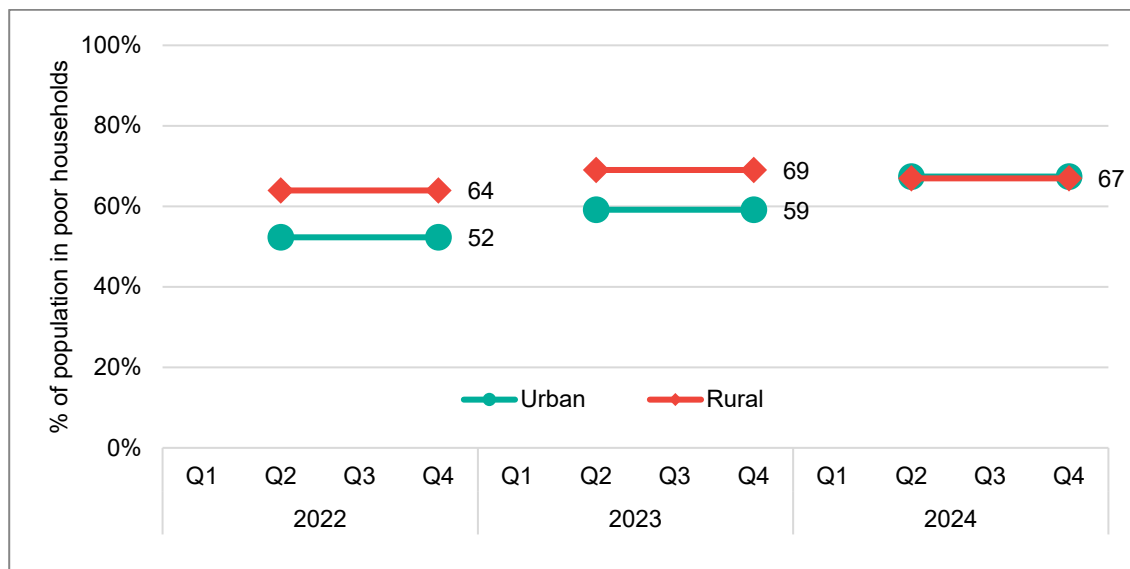
**Figure 4. Income poverty headcounts (percentage of the population living in poor households), by location and survey round**



Note: Quarters correspond to the income recall period in each survey round. Q1 2022 refers to November 2021–February 2022; Q2 2022 refers to March 2022–June 2022; Q4 2022 refers to September 2022–December 2022; Q2 2023 refers to February 2023–June 2023; Q4 2023 refers to August 2023–November 2023; Q2 2024 refers to March–July 2024. Asterisks show significance differences between rounds: \*p < 0.10, \*\* p < 0.05, \*\*\* p < 0.01.

Source: Author's calculations based on MHWS data.

**Figure 5. Pooled income poverty headcounts (percentage of the population living in poor households), by location and period**



Note: Quarters correspond to the income recall period in each survey round. Q1 2022 refers to November 2021–February 2022; Q2 2022 refers to March 2022–June 2022; Q4 2022 refers to September 2022–December 2022; Q2 2023 refers to February 2023–June 2023; Q4 2023 refers to August 2023–November 2023; Q2 2024 refers to March–July 2024.

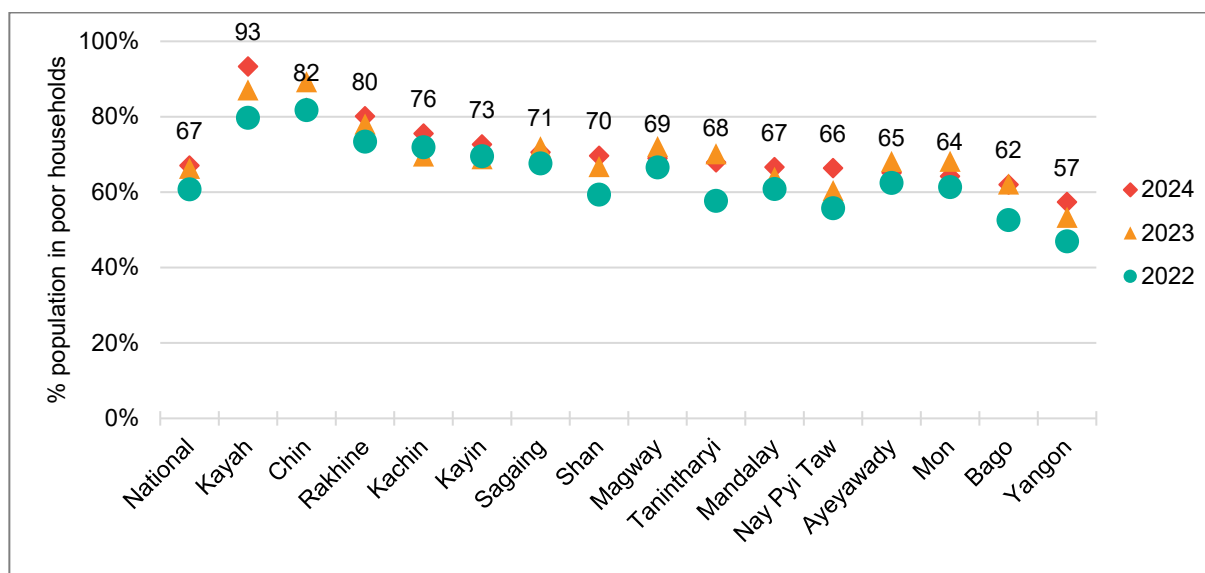
Source: Author's calculations based on MHWS data.

**Wage earning households continue to be the poorest livelihood group, with pooled income poverty rates of 87 and 82 percent in farm and non-farm wage earning households, respectively, in the 2024 (Q2 – Q4 2024 pooled period).** Poverty among own farm households

remained relatively stable (58.0 percent), but non-farm business and non-farm salary livelihood groups saw increases of 10.0 and 15.9 percentage points in poverty, respectively, over the two-year period from 2022 to 2024. Therefore, even though poverty rates in these households are below the national average, the gap has narrowed over time relative to wage earning households.

**In almost every state/region, pooled income poverty reached a new high over the last two years** (Figure 6). In the most recent estimates, we find alarmingly high rates of poverty in areas engulfed by conflict, with nearly 80 percent of the population suffering from poverty. For example, **pooled income poverty rates in 2024 were highest in Kayah (93 percent), Chin (82 percent), and Rakhine (80 percent)**. The income poverty rate in the remaining state/regions lies between 57 and 76 percent.

**Figure 6. Trends in pooled income poverty headcounts (percentage of population living in poor households), by state/region**



Source: Author's calculations based on MHWS data.

### **Determinants of Income Poverty**

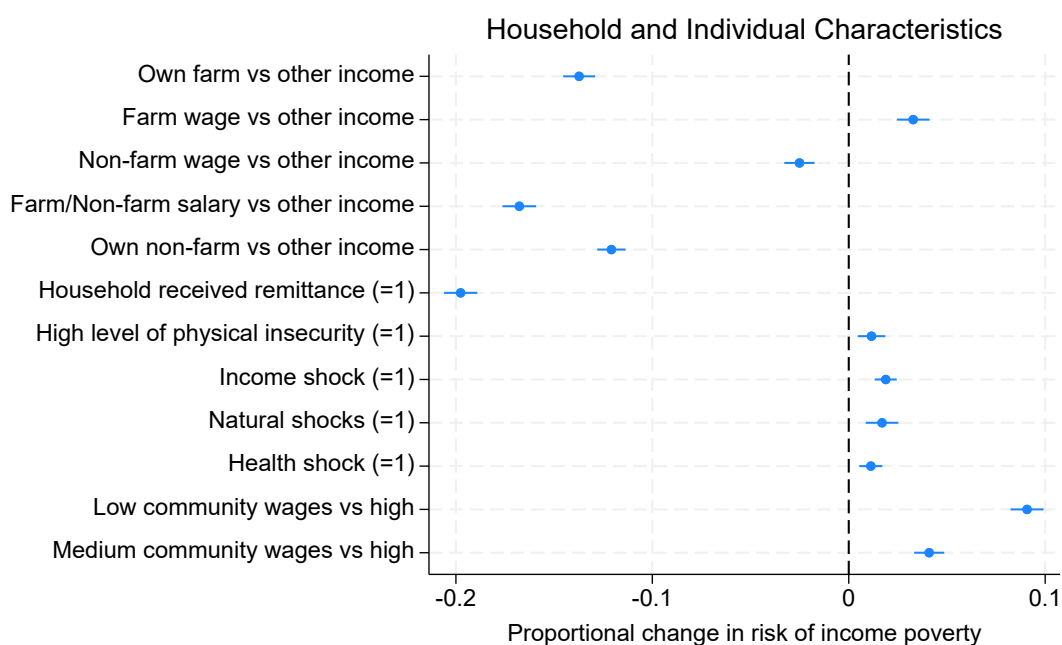
In this section, we present results from a random effects linear probability regression analysis to identify factors associated with household income poverty status. Other variables included in the regression that are not shown in Figure 7 are age, gender and educational attainment of respondent, household size, state and survey year. Key results are summarized below:

- **Households whose main source of income is from farm wage work are least resilient to worsening economic conditions and conflict in Myanmar.** Salaried workers are most resilient to income poverty relative to households with other or no source of income.
- **Receiving remittances helps to avert income poverty.** Households who receive remittances are 19.7 percentage points less likely to be income poor.
- **Household size and composition matter.** Larger households and households with higher numbers of dependent members are more likely to be poor.
- **Education of household head is important.** Households whose heads have only completed primary school are 5.2 percentage points more likely to be poor.
- **Households that experienced shocks within the three months preceding the survey are more likely to be in poverty.** Specifically, experiencing economic shocks raises the

probability of being poor by 1.9 percentage points, natural shocks by 1.7 percentage points, and health-related shocks by 1.1 percentage points.

- **Conflict is associated with poverty.** Households where the respondent reported feeling physically insecure (used as a proxy for conflict-related shocks) are 1.2 percentage points more likely to be in poverty compared to those who did not report such insecurity.
- **Community-level wages are strongly associated with household poverty.** The prevailing median casual wage at the community level significantly influences household poverty status. Households residing in low-wage communities are 9 percentage points more likely to be in poverty, while those in medium-wage communities are 4.1 percentage points more likely to be poor - both relative to households living in high-wage communities.

**Figure 7. Changes in the probability that a household is income-poor income poverty**



Note: The dependent variable is income-based poverty. Households are defined as income poor if they have income per adult equivalent per day less than the poverty line. See **Error! Reference source not found.2** for full regression results. The model also controls for shocks, state/region and the sex of the respondent.  
Source: Author's calculations based on MHWS data.

## Conclusion

The combined economic and political crises in Myanmar have significantly impacted inflation and income levels, leading to an increase in poverty over the past two years. Using eight rounds of the MHWS, we highlight several worrying trends.

First, median real household income per adult equivalent per day has remained constant over the past year but is about 18.0 percent lower than in 2022.

Second, falling wages, along with transportation and access-related barriers, have become the most significant challenges faced by wage and salaried workers. For enterprises and crop producers, the primary constraints were high cost and limited availability of inputs. Additionally, market access and transport-related difficulties were reported as key obstacles to the sale of crops.

Third, the income-based poverty rate, adjusted for seasonality, rose slightly to 67.1 percent in 2024, up 0.8 percentage points from 2023 and 5.6 percentage points higher than in 2022. The urban-rural poverty gap, which had narrowed between 2022 and 2023, was fully closed by 2024 as the

urban poverty rate rose by 15.1 percentage points from 2022 to 2024, compared to just a 3-percentage point increase in rural areas over the same period.

Fourth, there are only a few factors helping households stay out of poverty, including earning income from salaried work, and receiving assistance or remittances. The presence of remittance income significantly mitigates poverty levels, with individuals in remittance-receiving households experiencing a notable 19.7 percentage point reduction in the probability of being poor compared to those without remittance income.

A limitation of the survey-based evidence in conflict-affected settings is selection bias. Like any survey, the MHWS will struggle to capture some of the most conflict-affected areas due to limited access to cellphone and electricity, especially in Kayah and Rakhine. In addition, our ability to survey internally displaced persons (IDPs), which rose to about 3.5 million in May 2025 according to reports from UNHCR, were limited since IDPs are in the most precarious situations and have limited access to phones. Therefore, the deterioration in welfare captured through our phone survey is likely to be an underestimation of the true decline in welfare in Myanmar.

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