Myanmar Monthly Food Price Report – September 2026

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KEY HIGHLIGHTS

- Rice prices continued to increase in September 2026, with the national average rising by 6.2 percent month-on-month and 27.9 percent year-on-year. Regional disparities remained pronounced, with particularly sharp increases in Kachin, Ayeyarwady, and Mon. Flooding, transportation disruptions, and damage to monsoon paddy fields contributed to higher prices and raised concerns about upcoming harvests.
- Crop prices showed mixed movements. Maize, black gram, and pigeon pea prices remained well above year-earlier levels, while green gram prices declined amid softer Chinese demand. Onion prices surged by 37.6 percent month-on-month and 240.1 percent year-on-year on reduced supply and continued buying from Thailand. Chili prices stayed elevated; potato prices declined despite weather-related crop damage.
- Most animal-sourced food prices remained above year-earlier levels, though chicken and egg prices eased month-on-month. Mutton prices held at record highs (+68.6 percent year-on-year), while pork prices stayed below year-earlier levels amid continued disease concerns and soft demand.
- Ongoing disruptions to Middle East shipping routes continue to pressure fuel and fertilizer costs, with fertilizer prices still well above last year's levels – a risk to fertilizer use and agricultural production.
- Heavy rain, flooding and structural damage to the Ma Mya Dam in Ayeyarwady, along with strengthening El Nino conditions, pose continued risks to agricultural production and food supply chains.
- The outlook for Myanmar's food markets remains shaped by weather risks, elevated input costs, and shifting export conditions, including Thailand's maize import policy, China's green gram residue requirements, and proposed private-sector food price stabilization measures.

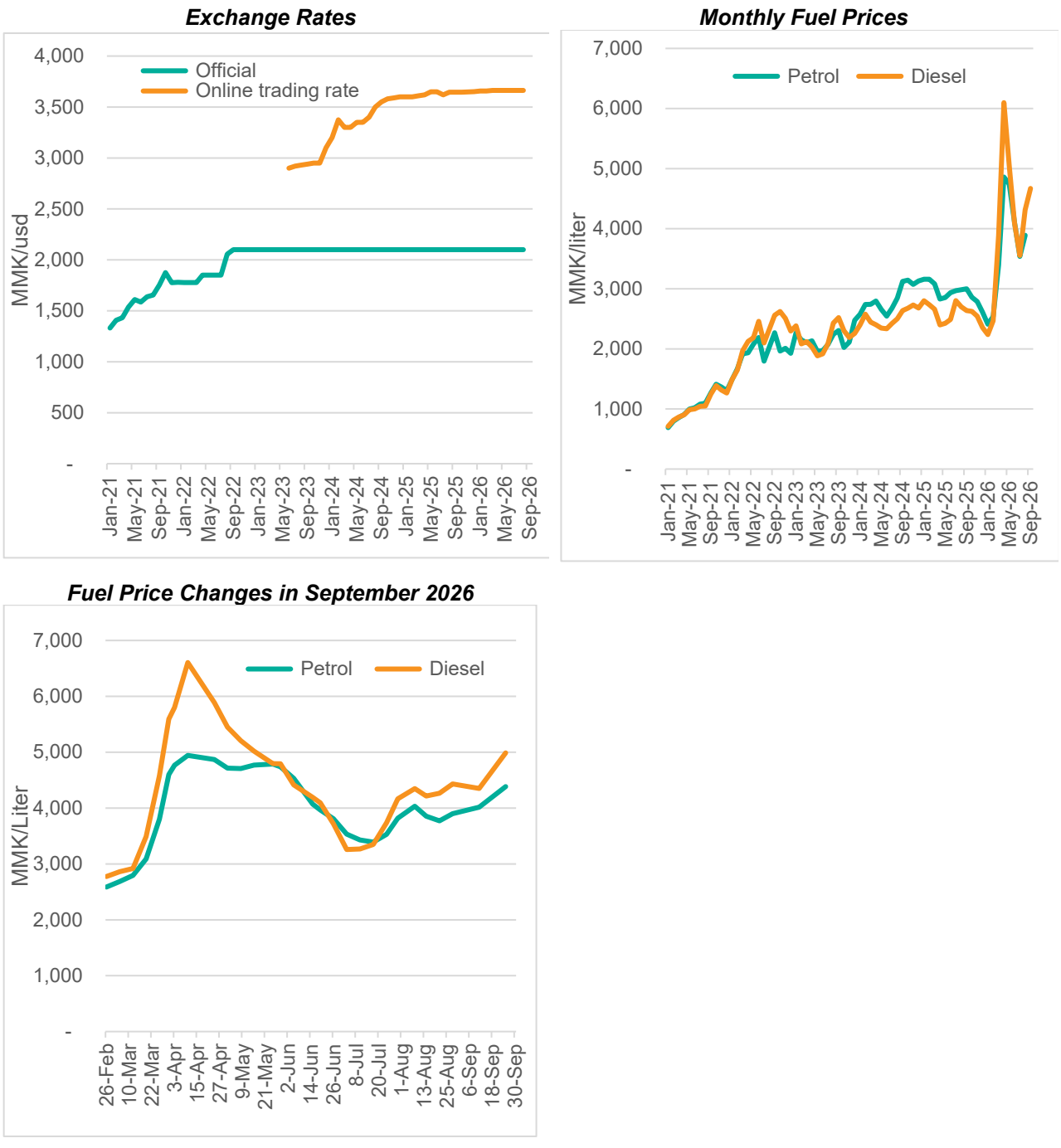
Introduction

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 September 2026, the official exchange rate remained unchanged at 2,100 MMK/USD – at the same level for almost four years (Figure 1). The online trading exchange rate increased marginally by 0.5 percent compared to September 2025, indicating relatively stable formal foreign exchange market conditions. As in previous months, export earnings remained subject to the requirement that 15 percent be exchanged at the official rate and the remaining 85 percent at the online trading rate.

Fuel prices increased substantially over the past months due to trade disruptions linked to the near-complete closure of the Strait of Hormuz. At the end of September 2026, diesel prices were 71 percent higher and petrol prices 66 percent higher than prior to the start of the conflict. Relative to the same month in 2025, diesel prices in September 2026 increased by 77 percent while petrol prices increased by 44 percent (Figure 1). While prices have declined from their high levels in April, they increased again toward the end of September compared with the beginning of July. Moreover, fuel remains scarce in parts of the country, with sharp price increases in remote and conflict-affected areas.

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 that national average rice prices increased by 6.2 percent month-on-month and 27.9 percent year-on-year in September 2026, while regional price movements continued to vary considerably. A comparison of rice prices across different regions and states reveals the following.

- Rice prices increased month-on-month in several regions and states. The largest increases were observed in Kachin (24.0 percent), Ayeyarwady (14.7 percent), Mon (14.3 percent), Kayin (11.4 percent), and Magway (10.7 percent). Prices remained unchanged in Shan (North), Shan (East), Shan (South), Kayah, Yangon, Bago, and Nay Pyi Taw.
- Year-on-year price increases were observed across most regions and states, except Shan (North) and Shan (East), where prices declined by 10.0 percent and 3.4 percent, respectively. The largest

increases were recorded in Kachin (72.2 percent), Mon (53.8 percent), Kayah (50.0 percent), Sagaing (48.4 percent), Nay Pyi Taw (46.2 percent), and Shan (South) (37.9 percent).

- Regional price gaps remained pronounced. Kachin, Shan (North), Kayah, Sagaing, and Magway recorded prices above the national average, while Shan (South), Kayin, Ayeyarwady, Yangon, Mandalay, Bago, and Nay Pyi Taw remained below the national average. Kachin recorded the highest price, at approximately 46 percent above the national average, while Bago was about 18 percent below the national average.

The sharp increase in rice prices in Kachin was reportedly linked to persistent transportation disruptions along the Mandalay-Myitkyina route, which continued to constrain commodity supplies. Elsewhere, rice price increases were reportedly associated with continued flood-related disruptions to transportation and rice supplies in major rice-producing regions. Heavy rainfall in September also damaged monsoon paddy fields approaching harvest in several townships of Ayeyarwady, raising concerns about production losses, rice quality, and farmers' financial capacity to replant flood-damaged fields.

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

	Comparison over Time (nominal prices)						Comparison of States/Regions (relative to national average)		
State/Region	Sep-26 Current	Sep-25 Last Year		Aug-26 Last Month			Sep-26 Current	Sep-25 Last Year	Aug-26 Last Month
Kachin	2,914	1,692	72.2%	2,350	24.0%		1.46	1.08	1.25
Shan (North)	2,115	2,350	-10.0%	2,115	0.0%		1.06	1.50	1.12
Shan (East)	1,997	2,068	-3.4%	1,997	0.0%		1.00	1.32	1.06
Shan (South)	1,880	1,363	37.9%	1,880	0.0%		0.94	0.87	1.00
Kayah	2,115	1,410	50.0%	2,115	0.0%		1.06	0.90	1.12
Kayin	1,833	1,504	21.9%	1,645	11.4%		0.92	0.96	0.87
Mon	1,880	1,222	53.8%	1,645	14.3%		0.94	0.78	0.87
Tanintharyi	1,974	1,504	31.3%	1,927	2.4%		0.99	0.96	1.02
Yangon	1,692	1,504	12.5%	1,692	0.0%		0.85	0.96	0.90
Ayeyarwady	1,833	1,410	30.0%	1,598	14.7%		0.92	0.90	0.85
Sagaing	2,232	1,504	48.4%	2,068	8.0%		1.12	0.96	1.10
Mandalay	1,880	1,504	25.0%	1,786	5.3%		0.94	0.96	0.95
Magway	2,185	1,880	16.3%	1,974	10.7%		1.09	1.20	1.05
Bago	1,645	1,292	27.3%	1,645	0.0%		0.82	0.83	0.87
Nay Pyi Taw	1,786	1,222	46.2%	1,786	0.0%		0.89	0.78	0.95
National Avg.	1,997	1,562	27.9%	1,882	6.2%		1.00	1.00	1.00

Source: Department of Consumer Affairs

Other Crops

Maize prices increased slightly by 0.7 percent month-on-month and remained 28.2 percent higher year-on-year. According to the Myanmar Corn Industrial Association, national maize production has declined from more than 3 million tons in previous years to just over 2.5 million tons, reflecting continued challenges in the maize sector.

Chickpea prices showed limited movement month-on-month, but increased 12.2 percent increase year-on-year. In contrast, green gram prices declined by 4.2 percent month-on-month and 5.8 percent year-on-year. The continued price decline coincided with reports of softer Chinese demand, as increased domestic production and higher availability from other origins have reportedly reduced China's reliance on Myanmar green gram. Recent reports of newly harvested crops entering the Chinese market and improved yields further indicate increasing domestic supply. Myanmar's green gram exports declined substantially in FY2025/26, falling to 355,225 tons from 600,633 tons in FY2024/25, according to UMFCCI. China remained a major destination, accounting for 51.5 percent of Myanmar's maritime green gram exports in FY2024/25. China's rejection of Australian green gram over pesticide residues also suggests that its residue controls extend beyond Myanmar.

Black gram and pigeon pea, major export pulses to India, showed little month-on-month price movements, suggesting relatively stable market conditions. However, prices remained 15.7 percent and 24.0 percent higher

year-on-year, respectively. Reports from India indicated that Myanmar-origin black gram export offers strengthened in September, supported by lower-than-expected new-crop arrivals and tighter supplies in India. Similarly, Myanmar-origin pigeon pea prices remained firm, amid limited import availability and concerns over India's domestic production. Below-average monsoon rainfall and strengthening El Niño conditions have raised concerns about Indian pulses production, with Reuters noting that lower production could increase India's reliance on imports from Myanmar and other suppliers.

Garlic prices showed limited month-on-month movement but remained 11.8 percent higher year-on-year. Although traders indicated that garlic prices typically rise during August and September, continued supplies of Chinese garlic through the Shan State border reportedly put pressure on prices. Chili prices increased by 2.9 percent month-on-month and 30.9 percent year-on-year. Reports indicated that reduced production, limited market arrivals, and difficulties in drying and storing chili during the rainy season continued to constrain supply and support elevated prices. Chili prices also remained high in Ayeyarwady Region, where flood-related crop damage and higher transportation costs added to supply pressures.

Onion prices continued to increase, rising by 37.6 percent month-on-month and 240.1 percent year-on-year. As reported in December 2025, persistently low prices had discouraged onion cultivation, with market participants anticipating higher prices in 2026. Recent market reports suggest that reduced planting, together with weather-related production losses, contributed to lower summer onion output and declining stocks this year. Continued buying from Thailand added further upward pressure on prices. With newly harvested monsoon onions expected to enter the market only in late October or early November, traders anticipated further price increases until then. However, farmers reportedly saw limited benefits from the higher prices, with traders better positioned to benefit from holding stocks, while high production costs continued to weigh on farmers' returns.

Potato prices declined by 6.4 percent month-on-month and 11.4 percent year-on-year. Local reports indicated that excessive rainfall and waterlogging in Pinlaung and Naungtayar townships in southern Shan State damaged potato crops before maturity, resulting in underdeveloped tubers and reduced yields. Farmers reportedly faced financial losses as lower production limited their ability to recover cultivation costs.

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

	Sep-26	Sep-25		Aug-26	
Commodity	**Current**	**Last Year**		**Last Month**	
Export Crops					
- Maize	1,045	815	28.2%	1,038	0.7%
- Green Gram	3,124	3,317	-5.8%	3,259	-4.2%
- Black Gram	3,307	2,860	15.7%	3,322	-0.4%
- Chickpea	2,641	2,353	12.2%	2,655	-0.5%
- Pigeon Pea	3,316	2,675	24.0%	3,327	-0.3%
Local Crops					
- Onion	4,974	1,463	240.1%	3,614	37.6%
- Garlic	9,152	8,185	11.8%	9,144	0.1%
- Chili	15,136	11,565	30.9%	14,711	2.9%
- Potato	3,185	3,593	-11.4%	3,403	-6.4%

Source: Myantrade and DoA - MIS

Animal-Sourced Food

Most animal-sourced food prices remained above year-on-year levels in September 2026, while month-on-month movements were generally limited (Table 3). Chicken and egg prices were notable exceptions, declining by 9.1 percent and 4.1 percent month-on-month, respectively.

Pork prices remained unchanged month-on-month but declined by 2.2 percent year-on-year. New cases of swine disease continued to be reported in some areas, while public concerns over pork consumption in Yangon, which emerged following reports of diarrhea cases last month, may have continued to weigh on demand and prices.

Goat supply remained constrained as local conditions in major production areas reportedly led many producers to exit the sector, resulting in a continued supply-demand imbalance. Although live goat prices remained at high levels, recent market activity has slowed. Mutton prices remained unchanged month-on-month but were 68.6 percent higher year-on-year, remaining at record highs. Beef prices declined slightly by 1.2 percent month-on-month but remained 16.5 percent above year-on-year levels.

Fish prices remained above year-on-year levels, with carp and rohu prices increasing by 10.5 percent and 12.8 percent year-on-year, respectively, while showing limited month-on-month movements. Reports indicated that some fish farmers were exiting the market as rising feed, transportation, and labor costs continued to squeeze profit margins.

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

	Sep-26	Sep-25		Aug-26	
Commodity	**Current**	**Last Year**		**Last Month**	
- Eggs (piece)	550	446	23.4%	574	-4.1%
Meat					
- Chicken	13,223	12,704	4.1%	14,541	-9.1%
- Beef	19,159	16,443	16.5%	19,382	-1.2%
- Pork	18,958	19,381	-2.2%	18,958	0.0%
- Mutton	36,012	21,354	68.6%	36,012	0.0%
Fish					
- Carp	16,905	15,298	10.5%	16,667	1.4%
- Rohu	11,922	10,565	12.8%	11,922	0.0%

Source: Department of Consumer Affairs

Looking Forward

Key developments to monitor in upcoming months include:

- **International rice price developments**: International rice prices increased in September 2026, with the FAO Rice Price Index rising by 1.4 percent month-on-month and 9.5 percent year-on-year. Given the strong integration of Myanmar's rice markets with global markets, these trends may continue to influence agricultural incentives, particularly in light of rising costs of key agricultural inputs such as mechanization services and fertilizer.
- **Maize market:** Myanmar's maize export destinations have reportedly declined from 10 countries to just three, with Thailand remaining the main export market. Given this dependence, Thailand's cancellation of a planned 600,000-ton ASEAN maize import program in late August could have implications for Myanmar's maize exports in the coming months.
- **Green gram market:** Following China's rejection of Myanmar green gram shipments over pesticide residues in 2025, MPBMSMA and private exporters are working with farmers to promote Good Agricultural Practices (GAP) and improve compliance with export requirements ahead of the upcoming planting season. However, continued concerns over pesticide residues and uncertain export demand have reportedly made some farmers hesitant to cultivate green gram, potentially affecting future production.
- **Food price stabilization:** Amid rising food prices, UMFCCI discussed establishing a private-sector food price stabilization group to address supply chain, financing, and transportation challenges. The implementation of these proposed measures and their potential implications for food price stability will be important to monitor in the coming months.
- **Agricultural production risks:** Heavy rainfall and flooding continued to affect farmland in parts of Sagaing and Tanintharyi regions, disrupting agricultural production. In Ayeyarwady Region, structural damage to Ma Mya Dam raised concerns over potential flooding of approximately 10,486 acres of farmland, with possible impacts extending to surrounding agricultural areas. Continued monitoring will be important as further flooding and potential irrigation disruptions could affect crop production, transport, and food supply chains.

- **El Niño impacts:** El Niño conditions have strengthened and are now classified as very strong, with the World Meteorological Organization forecasting that the event is likely to persist through February 2027 and reach peak intensity toward the end of 2026. Myanmar's Department of Meteorology and Hydrology has warned of irregular rainfall, higher temperatures, drought, and other extreme weather that could affect agricultural production and irrigation water availability. DMH specifically advised farmers to coordinate crop harvesting schedules with weather conditions, highlighting the need for continued monitoring and adjustment of agricultural activities.
- **Implications of the conflict in Iran:** The conflict in Iran has led to a near-complete closure of the Strait of Hormuz, through which more than a quarter of the world's oil exports and an estimated 20–30 percent of global fertilizer exports normally transit. Compounding this, fighting has recently expanded to the Red Sea — another major fuel shipping corridor — where Houthi attacks on Saudi-linked shipping have further disrupted regional trade routes. These developments are particularly concerning for Myanmar's agrifood system, which depends heavily on fuel for transportation, irrigation, mechanization, and processing. Fertilizer prices are also substantially above last year's levels. The reference price for a bag of urea, set at 120,000 MMK, remains well above the 94,000 MMK per bag recorded during the previous monsoon season, representing an increase of about 28 percent. As crop output prices have changed less over the same period, the profitability of fertilizer use has declined, possibly leading to lower application rates and reduced agricultural production.

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