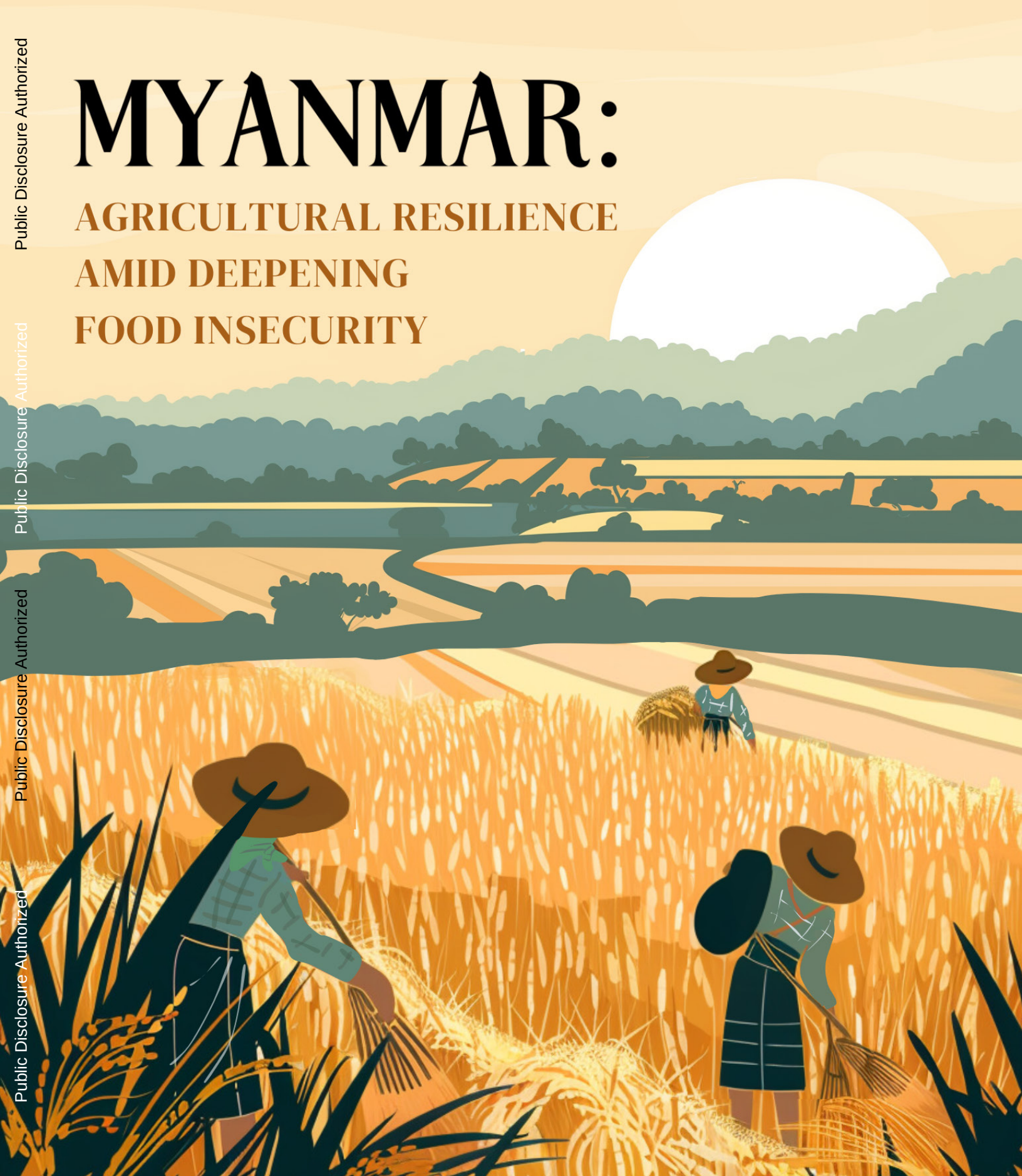


MYANMAR:

AGRICULTURAL RESILIENCE AMID DEEPENING FOOD INSECURITY



Agriculture and Food Security Monitoring Report, June 2024



WORLD BANK GROUP

CONTENTS

List of Figures ii

List of Tables iii

List of Boxes iii

Abbreviations and Acronyms iv

Acknowledgments.....v

EXECUTIVE SUMMARY 1

BURMESE EXECUTIVE SUMMARY 6

1. INTRODUCTION 11

2. ECONOMIC OVERVIEW 12

3. FOOD SECURITY 15

4. PRODUCTION.....32

5. PRICES 40

6. TRADE 45

7. OUTLOOK.....53

REFERENCES 55

ANNEX.....58

 Methodological Notes.....58

 Supplementary Figures and Tables.....64

List of Figures

Figure 1: Farm households’ self-reporting on food security status (percentage of households) 15

Figure 2: Food price and projections for selected commodities 19

Figure 3: Overall findings for households’ food access within the last week (percentage)..... 22

Figure 4: Households that consumed any of the following food items in the last 24 hours (percentage) 23

Figure 5: HDDS by agroecological zone..... 23

Figure 6: HDDS by region and state 24

Figure 7: Households affected by additional shocks and reactions (percentage)..... 28

Figure 8: Purpose of liquidating assets (percentage of households) 28

Figure 9: Production, area and yields in selected crops in Myanmar (2018–24)..... 33

Figure 10: Reported issues in obtaining credit from input suppliers (percentage of households), 2021–24 38

Figure 11: Indebtedness and solvency in farm households (percentage of households) 39

Figure 12: Changes in farming costs and sowing problems in the upcoming monsoon season (percentage of households), 2021–24..... 41

Figure 13: Recent food trade trends in Myanmar 46

Figure 14: Crop exports (value and volume) in Myanmar, 2020–23..... 47

Figure 15: Crop imports (value and volume) between 2020 and 2023 in Myanmar 50

Figure 16: Exchange rates (kyat per US\$)..... 51

Figure A.1: Agroecological zones in Myanmar 59

Figure A.2: Farm households’ reported issues in accessing food items (percentage)..... 64

List of Tables

Table 1: Distribution and number of IDPs across Myanmar, May 2024 ...17

Table 2: Variation and projections of retail prices by commodity, April 2024 (percentage).....18

Table 3: Non-adjusted and adjusted rice sufficiency 34

Table 4: Progress in annual harvesting of paddy (percentage of planted area).....35

Table 5: Myanmar's major traded food commodities in 2023 (value in US\$ million) 45

Table A.1: Food items comprised in the calculation of the HDDS 61

Table A.2: Annual targets and variation of paddy area to be planted and progress in harvested paddy area 65

Table A.3: Production, area and yields in selected crops in Myanmar (2018–24) 66

Table A.4: Non-adjusted and adjusted rice sufficiency per state and region 67

Table A.5: Non-adjusted and adjusted rice sufficiency per state and region 68

List of Boxes

Box 1: Rising food insecurity in conflict-affected areas of rural Myanmar 25

Box 2: The importance of NTFPs in Myanmar 30

ABBREVIATIONS AND ACRONYMS

CATI	Computer-assisted telephone interviewing
CBM	Central Bank of Myanmar
CSO	Central Statistical Organization
CSOs	Civil Society Organizations
FAO	Food and Agriculture Organization of the United Nations
GNLM	Global New Light of Myanmar
HDDS	Household Dietary Diversity Score
HS	Harmonized System
IDP	Internally displaced persons
IFPRI	International Food Policy Research Institute
ILO	International Labour Organization
MDN	Myanmar Digital News
MOALI	Ministry of Agriculture, Livestock and Irrigation
MRF	Myanmar Rice Federation
NGO	Non-Governmental Organizations
NTFP	Non-Timber Forest Products
OCHA	United Nations Office for the Coordination of Humanitarian Affairs
RFA	Radio Free Asia
SAC	State Administration Council
UNHCR	United Nations High Commissioner for Refugees
USAID	United States Agency for International Development
USDA	United States Department of Agriculture
WBFS	World Bank Farmer Survey
WFP	World Food Programme

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EXECUTIVE SUMMARY

Sectoral Overview

Agriculture in Myanmar faces numerous obstacles. Farming is becoming more challenging due to uncertain produce prices and demand, high operational costs, climate shocks, and conflict-related insecurity. A mixture of conflict-related challenges, more expensive transportation, and sector inefficiencies are affecting food distribution, significantly impacting farmers' livelihoods alongside food availability and affordability.

Uncertainties around logistics, global prices, and the erratic policy environment on export earnings are impacting trade. Between 2022 and 2023, food exports dropped by 9 percent and food imports by 12 percent. High foreign demand is likely to sustain a favorable outlook for prices of export-oriented commodities, with domestic demand often offsetting volatility in foreign markets. However, the ongoing depreciation of the kyat will keep piling pressure on imports.

Food Security

Food insecurity in Myanmar remains high and is deeply concerning. Retail prices of food remain at record year-on-year levels and continue to rise monthly, affecting food access. The cost of common and healthy diets has risen by 29 and 37 percent, respectively, between early 2023 and early 2024. The highest costs are seen in conflict-affected Rakhine, Chin, Kayah, and Shan states.

Kyat depreciation, conflict escalation, and logistical disruptions underpin rising prices and food insecurity. The poorest in the country are particularly affected by the soaring prices of food baskets. The climbing cost of food has outstripped the increase in earnings of people experiencing poverty, especially in urban areas. Retail food prices have risen by 54–78 percent year-on-year. The diversity of diets consumed has been deteriorating across all regions of Myanmar since 2022, with over 50 percent of households reporting reduced consumption of diverse food items by December 2023. Farming households

are as concerned about sustained access to food now as they were in 2021. Shocks are increasingly affecting farming households, forcing more farmers, especially women, to resort to negative coping strategies, including borrowing money, selling assets, and reducing food consumption. Conflict has been the major shock. About 30 percent of surveyed households reported experiencing conflict in their villages over the past 12 months – a notable increase from previous years. In 2023, 46 percent of households reported not being affected by conflict and violence, but this share plunged to only 6 percent in 2024, significantly impacting livelihoods. Consequently, households are exploring other livelihood options, such as increased use of Non-Timber Forest Products (NTFPs) as a coping strategy in forest-dependent rural communities.

Production

Between the 2022 and 2023 monsoon seasons, rice yields improved by approximately 7 percent despite multiple challenges, demonstrating producers’ resilience. Fertilizer was more available, with prices reducing by 50 percent for urea and 38 percent for compound fertilizers. Farmers’ fertilizer use has risen by 20 percent, returning to 2020 levels and contributing to the production outcome. However, despite a positive aggregate picture, regional disparities in production outcomes exist. Farmers in insecure regions and areas affected by flooding still face significant challenges accessing inputs, including fertilizer. Fuel and labor costs have increased, raising farmers’ operational costs and disrupting production.

Conflict has significantly impacted farmers’ ability to sow crops due to safety concerns, displacement, and transport disruptions, with farmers in conflict-affected areas reporting a higher prevalence of operational difficulties in sowing and harvesting. The highest prevalence of farmers reporting such difficulties was in Kayah and Rakhine. In fact, after years of decline, the number of farmers expecting challenges in the upcoming sowing season has doubled. During the 2024 dry season, paddy harvesting progress lagged behind previous years. Challenges related to safety concerns,

internal displacement, and transportation disruptions were frequently reported by farmers from the Hilly and Coastal Zones (25 percent and 21 percent, respectively). Conflict has also significantly affected farmers’ access to extension services, impeding access to valuable production information.

Prices

The wholesale price for rice keeps rising year-on-year, improving farmers’ potential for profitability. Accordingly, the price incentive makes the outlook for paddy for 2024 promising despite some uncertainties. Maize prices have remained low, however, largely due to changing foreign demand and low global prices. Prices of other major crops in Myanmar increased compared to the last monsoon season.

Fertilizer prices have reduced, driven by lower international prices. However, the prices of other agricultural inputs are higher than the year before: there was a 20 percent increase in plowing costs and 19 and 23 percent increases in labor costs for men and women, respectively (Minten 2024). The prices of agricultural inputs are especially pronounced in insecure regions. Conflict-related disruptions and transport delays have negatively affected food prices and farmers’ ability to sell perishables.

Power outages are forcing agricultural firms to rely more on costly fuel-based energy alternatives, which increases operational costs and food prices. High fuel prices and operational challenges further affect transport and logistics, leading to costlier food.

Trade

In 2023, Myanmar experienced a decline in international food trade, plunging to its lowest level in four years. Rice export volumes were the lowest since 2020, possibly due to the negative effect of policy on export earnings. Of the major crops, maize was the main contributor to the overall decline in food exports: maize exports in 2023 plummeted by 31 percent. This decrease is

partly due to a global downturn in maize prices. The decline in legume exports was modest due to high demand, but the volume of palm oil imports increased by 20 percent during 2023; however, its import value decreased due to the global palm oil price downturn. An increase in rice exports is expected due to increased production. However, prospects for maize exports are uncertain due to the decline in global prices and the ban on maize imports from Thailand.

Kyat depreciation and foreign exchange and trade policies have strongly impacted the availability and price of imported food products. While wheat imports increased in value and volume compared to 2022 (49 percent and 64 percent, respectively), the import of processed food has been declining since 2020. Uncertainties in these areas will likely persist in 2024 as kyat depreciation and trade challenges continue, including difficulties in obtaining import licenses.

Recommendations

Development partners have played an important role in mitigating the challenges faced by poor households in Myanmar since the military coup in 2021 and the subsequent conflict. They can continue to support vulnerable households through the following actions:

1. Bolstering food production capabilities of farmers by increasing availability and access to key inputs. Development partners should continue efforts to sustain agricultural production in Myanmar by enhancing the availability of essential agricultural inputs such as seeds, machinery, and fertilizers, particularly in insecure and geographically isolated areas. Development organizations have delivered input support even in the most conflict-affected regions, using partnerships with local organizations. There is a pressing need for additional funding and enhanced operational guidelines to allow responses to continue. Presently, only 10 percent of the required US\$994 million funding for humanitarian assistance has been received (OCHA 2024).

2. Enhancing short-term food access, especially in regions affected by conflict and insecurity. Food and emergency aid are urgently required to address food and nutrition security risks, especially among women and children in conflict-affected areas like Chin, Rakhine, Kachin, and Kayah, where dietary diversity has particularly deteriorated. In 2024, OCHA estimates that 12.9 million people, including Internally Displaced Persons (IDPs), returnees, and host community members, need emergency food assistance. About 11.5 million people need emergency agriculture and livelihood assistance with 290,000 requiring both kinds of support. UNICEF alone estimates that it needs about US\$26 million in 2024 to provide nutrition and social protection assistance to children and families in Myanmar (UNICEF 2024). An expansion of nutrition-sensitive social protection programs, like maternal and child cash transfers, is needed. Where mobile phone coverage exists, digital cash transfer has been one of the best solutions to support the most vulnerable families and could be used to enhance access to cash. Promoting small-scale livestock production, i.e., chickens, ducks, and goats, along with backyard vegetable gardens, can offer a viable short-term solution to improve household dietary diversity and address nutritional challenges.

BURMESE EXECUTIVE SUMMARY

အနှစ်ချုပ် အစီရင်ခံစာ

ကဏ္ဍအလိုက် ခြုံငုံတင်ပြခြင်း

မြန်မာ့စိုက်ပျိုးရေးသည် အခက်အခဲများစွာနှင့် ရင်ဆိုင်နေရသည်။ လယ်ယာလုပ်ငန်းသည် ခန့်မှန်းရက်သည့် ကုန်ဈေးနှုန်းများနှင့် ဝယ်လိုအား ၊ ထုတ်လုပ်စရိတ် ကြီးမြင့်မှု ၊ ရာသီဥတု ဖောက်ပြန်မှု နှင့် ပဋိပက္ခ လုံခြုံရေးအခြေအနေများ စသည်တို့ကြောင့် ပို၍ ပို၍ စိန်ခေါ်မှုများ နှင့် ရင်ဆိုင်လာရသည်။ ပဋိပက္ခကြောင့် ဖြစ်ပေါ်လာသည့် နောက်ဆက်တွဲ အခက်အခဲများ၊ သယ်ယူပို့ဆောင်ရေးစရိတ်များကြီးမြင့်လာခြင်း နှင့် ကဏ္ဍအလိုက် စွမ်းဆောင်ရည် ကျဆင်းလာခြင်းတို့က အစားအစာ ဖြန့်ဖြူးခြင်းကို ထိခိုက်စေပြီး အထူးသဖြင့် လယ်သမားများ၏ သက်မွေးဝမ်းကျောင်းမှု ၊ အစားအစာရရှိနိုင်မှု ၊ ဝယ်ယူစားသုံးနိုင်မှုတို့ကို ထိခိုက်စေသည်။ ကုန်စည်သယ်ယူပို့ဆောင်ရေး ၊ ကမ္ဘာ့ဈေးကွက်နှုန်းထားနှင့် အပြောင်းအလဲမြန်သည့် မူဝါဒအခင်းအကျင်း တို့ကြောင့် မရေရာမှုများ ပိုမိုဆိုးရွားလာ၍ ပြည်ပပို့ကုန်ရငွေအပေါ် သက်ရောက်မှုရှိရာမှသည် ကုန်သွယ်မှုကိုပါ ထိခိုက်စေသည်။ ၂၀၂၂ နှင့် ၂၀၂၃ ခုနှစ်အတွင်း အစားအစာပြည်ပပို့ကုန် ၉ ရာခိုင်နှုန်းနှင့် သွင်းကုန် ၁၂ ရာခိုင်နှုန်းအထိ ကျဆင်းခဲ့သည်။ နိုင်ငံခြားဝယ်လိုအား ကောင်းနေခြင်းကြောင့် ပို့ကုန်ဦးစားပေး ကုန်ပစ္စည်းဈေးနှုန်းအတွက် ကောင်းမွန်သော အခြေအနေတခု ဖြစ်စေသော်လည်း ပြည်တွင်းဝယ်လိုအား အခြေအနေ အပြောင်းအလဲက နိုင်ငံခြားဈေးကွက်ကို လှုပ်ခတ်စေသည်။ ထို့ပြင် ကျပ်ငွေတန်ဖိုး ဆက်လက်ကျဆင်းနေခြင်းက သွင်းကုန်အပေါ် ဖိအားဖြစ်စေသည်။

စားနပ်ရိက္ခာ ဖူလုံမှု

မြန်မာနိုင်ငံတွင်း စားနပ်ရိက္ခာမလုံလောက်မှု အခြေအနေ ဆက်လက်မြင့်မားနေခြင်းက စိုးရိမ်ဖွယ်ဖြစ်သည်။ အစားအစာ လက်လီဈေးနှုန်းများက နှစ်အလိုက် စံချိန်တင် မြှင့်တက်နေသကဲ့သို့ ဆက်လက်မြှင့်တက်နေဆဲ ဖြစ်သည့်အတွက် အစားအစာ ရယူစားသုံးနိုင်မှု အပေါ် သက်ရောက်နေသည်။ ၂၀၂၃ နှင့် ၂၀၂၄ခုနှစ် အစောပိုင်းကာလများ၌ ကျန်းမာရေးနှင့်ညီညွတ်သည့် အခြေခံစားသောက်ကုန် ဈေးနှုန်းများ ၂၉ နှင့် ၃၇ ရာခိုင်နှုန်းအထိ မြှင့်တက်သွားခဲ့သည်။ ပဋိပက္ခဖြစ်ပွားနေသည့် ရခိုင်၊ ချင်း ၊ ကယား နှင့် ရှမ်းပြည်နယ်များတွင် ကုန်ဈေးနှုန်း အမြင့်ဆုံးဖြစ်ခဲ့ကြောင်း တွေ့ရှိရသည်။

ကျပ်ငွေတန်ဖိုးကျဆင်းခြင်း၊ ပဋိပက္ခ ပိုမို ဆိုးရွားလာခြင်းနှင့် ကုန်စည်သယ်ယူပို့ဆောင်ရေး ပြတ်တောက်ခြင်းများကြောင့် ကုန်ဈေးနှုန်းမြှင့်တက်လာခြင်းနှင့် စားနပ်ရိက္ခာ မလုံလောက်မှုများ ဖြစ်စေသည်။ နိုင်ငံတွင်း အဆင်းရဲဆုံးပြည်သူများသည် မြှင့်တက်လာသည့် အစားအစာဈေးနှုန်းများဒဏ်ကို ပြင်းပြင်းထန်ထန် ခံရသူများဖြစ်ကြသည်။ မြှင့်တက်လာသည့် အစားအစာ ဈေးနှုန်းများနှင့် ဝင်ငွေမမျှတသည့်အခါ အထူးသဖြင့် မြို့ပြဒေသများတွင် ဆင်းရဲမွဲတေမှုအခြေအနေမှာ ဆိုးရွားလာသည်။ အစားအစာ လက်လီဈေးနှုန်းသည် တစ်နှစ်ထက်တစ်နှစ် ၅၄-၇၈ ရာခိုင်နှုန်းအထိ မြှင့်တက်လာခဲ့သည်။ ၂၀၂၂ ခုနှစ်ကတည်းက မြန်မာနိုင်ငံတဝှမ်း အစားအစာ အမျိုးအမည် စုံလင်စွာ စားသုံးနိုင်မှု အခြေအနေသည် ကျဆင်းလာခဲ့ပြီး ဒီဇင်ဘာလ ၂၀၂၃ ခုနှစ်တွင်

အိမ်ထောင်စုများ၏ ၅၀ ရာခိုင်နှုန်းကျော်သည် အစားအစာအမျိုးအစားစုံလင်စွာ စားသုံးနိုင်မှု ကျဆင်းလာကြောင်း တင်ပြခဲ့ကြသည်။ လယ်ယာအိမ်ထောင်စုများက ၂၀၂၁ ခုနှစ်က နည်းတူ အစားအစာ ပုံမှန်ရရှိနိုင်မှုအတွက် စိုးရိမ်နေရဆဲဖြစ်ကြောင်း ပြောဆိုခဲ့ကြသည်။

လယ်ယာအိမ်ထောင်စုများသည် ပြင်ပရိုက်ခတ်မှုဒဏ်ကို ပိုမိုခံစားလာရပြီး လယ်သမားများ အထူးသဖြင့် အမျိုးသမီးများ အနေဖြင့် ငွေချေးငှားရခြင်း၊ ပိုင်ဆိုင်ပစ္စည်းများ ရောင်းထုတ်ရခြင်းနှင့် အစားလျော့စားရခြင်းအပါအဝင် အနှုတ်လက္ခဏာဆောင်သည့် နည်းလမ်းမျိုးစုံ အသုံးပြုနေကြရသည်။ ပဋိပက္ခသည် အဆိုးရွားဆုံးသော ထိခိုက်မှုပင်ဖြစ်သည်။ စစ်တမ်းကောက်ယူခဲ့သည့် အိမ်ထောင်စုများ၏ ၃၀ ရာခိုင်နှုန်းခန့်က ပြီးခဲ့သည့် ၁၂ လတာ ကာလအတွင်း ၎င်းတို့နေထိုင်သည့် ကျေးရွာများတွင် ပဋိပက္ခ ဖြစ်ပွားခဲ့ကြောင်း ဖြေကြားခဲ့ကြသောကြောင့် ယခင်နှစ်ကထက် သိသိသာသာ ပိုမို ဆိုးရွားလာသည့် အခြေအနေကို တွေ့မြင်ရသည်။ ၂၀၂၃ ခုနှစ်က အိမ်ထောင်စုများ၏ ၄၆ ရာခိုင်နှုန်းက ပဋိပက္ခနှင့် အကြမ်းဖက်မှုများကို တိုက်ရိုက် ကြုံတွေ့ခံစားရခြင်းမရှိကြောင်း ဖြေကြားခဲ့ကြသော်လည်း ၂၀၂၄ ခုနှစ်တွင် ရင်ဆိုင်ကြုံတွေ့ရသူ ၆ ရာခိုင်နှုန်းအထိ မြှင့်တက်သွားပြီး သက်မွေးဝမ်းကျောင်းမှုများကို သိသိသာသာ ထိခိုက်စေကြောင်း တွေ့ရသည်။ အကျိုးဆက်အားဖြင့် အိမ်ထောင်စုများသည် အခြား သက်မွေးဝမ်းကျောင်း နည်းလမ်းများရှာဖွေ လုပ်ကိုင်လာကြသည်။ သစ်တောအမှီပြုရသော ကျေးလက် ဒေသများတွင် ကျွန်းမဟုတ်သော သစ်ထုတ်လုပ်ခြင်း (Non-Timber Forest Products (NTFPs) ကဲ့သို့သော လုပ်ငန်းများ ပြောင်းလဲလုပ်ကိုင်လာကြရကြောင်း တွေ့ရသည်။

ကုန်ထုတ်လုပ်မှု

စိန်ခေါ်မှုများစွာနှင့် ရင်ဆိုင်နေရသော်လည်း ၂၀၂၂ နှင့် ၂၀၂၃ ခုနှစ် မိုးရာသီတွင် စပါးအထွက်နှုန်းသည် ပျမ်းမျှ ၇ ရာခိုင်နှုန်းအထိ တိုးတက်လာသောကြောင့် ဆန်စပါးစိုက်ပျိုးထုတ်လုပ်သူများ၏ ကြံ့ကြံ့ခံနိုင်စွမ်းကို ဖော်ပြနေသည်။ ကွန်ပေါင်း ဓါတ်မြေဩဇာ ဈေးနှုန်းများ ၃၈ ရာခိုင်နှုန်းခန့် နှင့် ယူရီးယားဓါတ်မြေဩဇာ ဈေးနှုန်း ၅၀ ရာခိုင်နှုန်းအထိ ကျဆင်းလာခဲ့သဖြင့် ဓါတ်မြေဩဇာရရှိနိုင်မှု ကောင်းမွန်လာခဲ့သည်။ လယ်သမားများ ဓါတ်မြေဩဇာအသုံးပြုမှု ၂၀ ရာခိုင်နှုန်းအထိ မြှင့်တက်လာခဲ့သဖြင့် ၂၀၂၀ ပြည့်နှစ် အခြေအနေသို့ ပြန်လည်ရောက်ရှိလာသည်ဟု ဆိုနိုင်ပြီး ကုန်ထုတ်လုပ်မှုကို အထောက်အပံ့ ဖြစ်စေခဲ့သည်။ ထိုသို့ အပြုသဘောဆောင်သည့် အရိပ်လက္ခဏာများနှင့်အတူ ဒေသအလိုက် ကုန်ထုတ်လုပ်မှုရလဒ် ကွာခြားမှုကိုလည်း တွေ့ရှိရသည်။ မလုံခြုံသည့် ဒေသများ၊ ရေကြီးနစ်မြုပ်သည့် နယ်မြေများတွင် နေထိုင်ရသည့် လယ်သမားများမှာမူ ဓါတ်မြေဩဇာ အပါအဝင် သွင်းအားစုများ ရရှိနိုင်ရန် အခက်အခဲတွေ့ကြရသည်။ လောင်စာဆီနှင့် လုပ်အားခများမြင့်တက်လာသဖြင့် လယ်ယာကုန်ထုတ်လုပ်ငန်း ကုန်ကျစရိတ်ကြီးမြင့်လာကာ ကုန်ထုတ်လုပ်မှု ကိုအတားအဆီးဖြစ်စေကြောင်း တွေ့ရသည်။

ပဋိပက္ခများကြောင့် ဘေးကင်းလုံခြုံမှုဆိုင်ရာ စိုးရိမ်မှုများ ၊ နေရပ်စွန့်ခွာ ရွှေ့ပြောင်းရခြင်းများ နှင့် သယ်ယူပို့ဆောင်ရေး ပြတ်တောက်ခြင်းများကြောင့် လယ်သမားများ၏ လယ်ယာစိုက်ပျိုးနိုင်စွမ်း အပေါ် ထိခိုက်စေသည်။ ပဋိပက္ခဒေသများမှ လယ်သမားများက စိုက်ပျိုးရေးနှင့် ရိတ်သိမ်းရေးတို့တွင် ပိုမိုအခက်အခဲတွေ့ကြရကြောင်း ပြောဆိုကြသည်။ ကယားနှင့် ရခိုင်ပြည်နယ်များရှိ လယ်သမားများအနေဖြင့် အဆိုပါ အခက်အခဲများ ဆိုးဆိုးရွားရွားကြုံတွေ့ရမှု အမြင့်ဆုံးဖြစ်ကြောင်း တွေ့ရှိရသည်။ အခက်အခဲများ နှစ်အတန်ကြာ ဆက်တိုက်ကြုံတွေ့ရပြီးနောက် လာမည့် စိုက်ပျိုးရာသီတွင်လည်း အခက်အခဲကြုံရနိုင်သည်ဟု မျှော်လင့်ထားသည့် လယ်သမားအရေအတွက် နှစ်ဆ ရှိလာကြောင်း တွေ့ရသည်။ ၂၀၂၄ ခုနှစ် ဆောင်းရာသီအတောအတွင်း ဆန်စပါးအထွက်နှုန်းသည် ယခင်နှစ်ကထက် ကျဆင်းခဲ့သည်။ ကုန်းမြင့်ဒေသနှင့် ကမ်းရိုးတန်းဒေသများမှ လယ်သမားများ (၂၅ ရာခိုင်နှုန်းနှင့် ၂၁ ရာခိုင်နှုန်း) ကလုံခြုံရေးအခြေအနေ ၊ ပြည်တွင်းနေရပ်စွန့်ခွာ ရွှေ့ပြောင်းမှု နှင့် သယ်ယူပို့ဆောင်ရေး အခက်အခဲများ ကို ထပ်ခါတလဲလဲ တင်ပြခဲ့ကြသည်။ ပဋိပက္ခသည် လယ်သမားများ၏ ဆည်မြောင်းရေရှိနိုင်မှု ၊ ကုန်ထုတ်လုပ်ရေးဆိုင်ရာ အရေးပါသည့် သတင်းအချက်အလက် ရရှိနိုင်မှု တို့အပေါ် သိသိသာသာ ထိခိုက်စေသည်။

ဈေးနှုန်းများ

စပါးလက်ကားဈေးမှာ တစ်နှစ်ထက်တစ်နှစ် မြင့်တက်လာနေခဲ့သဖြင့် လယ်သမားများ၏ အမြတ်အစွန်းဖြစ်ထွန်းနိုင်မှု အလားအလာ တိုးတက်လာသည်။ မရေရာမှုများ ရှိလင့်ကစား ဈေးကောင်းရနိုင်ခြေရှိခြင်းကြောင့် ၂၀၂၄ ခုနှစ် စပါး စိုက်ပျိုးထုတ်လုပ်နိုင်ခြေလည်း မြင့်တက်လာသည်။ ပြည်ပဝယ်လိုအား အပြောင်းအလဲနှင့် ကမ္ဘာ့ပြောင်းဈေး နိမ့်သောကြောင့် ပြောင်းဈေးနှုန်းများ နိမ့်နေဆဲဖြစ်သည်။ ပြီးခဲ့သည့် မိုးရာသီ နှင့်နှိုင်းယှဉ် ပါက အခြားသော မြန်မာ့အဓိကကောက်ပဲသီးနှံ ဈေးနှုန်းများ မြင့်မားပါသည်။ နိုင်ငံတကာဈေးကွက်တွင် ဓါတ်မြေသြဇာ ဈေးနှုန်းကျဆင်းလာသဖြင့် ပြည်တွင်း ဓါတ်မြေသြဇာဈေးနှုန်း ကျဆင်းလာသည်။ သို့သော် အခြားသော စိုက်ပျိုးသွင်းအားစုများမှာမူ ယခင်နှစ်ကထက် ဈေးမြင့်တက်လာသည်။ ထွန်ယက်စိုက်ပျိုးစရိတ် ၂၀ ရာခိုင်နှုန်း ၊ လုပ်အားခ (အမျိုးသားနှင့် အမျိုးသမီး) ၂၃ ရာခိုင်နှုန်း အသီးသီးမြင့်တက်သွားခဲ့သည်။ (Minten 2024) စိုက်ပျိုးရေး သွင်းအားစုဈေးနှုန်းများသည် အထူးသဖြင့် လုံခြုံရေးအခြေအနေဆိုးရွားသည့် ဒေသများတွင် ပိုမို ကြီးမြင့်သည်။ ပဋိပက္ခကြောင့် ဖြစ်ပေါ်သည့် အတားအဆီးများ နှင့် သယ်ယူပို့ဆောင်ရေး နှောင့်နှေးမှုများက အစားအစာဈေးနှုန်း နှင့် လယ်သမားများ၏ ရောင်းချနိုင်စွမ်းအပေါ် သက်ရောက်သည်။

လျှပ်စစ်ဓာတ်အားပြတ်တောက်မှုကြောင့် စိုက်ပျိုးရေး လုပ်ငန်းများသည် ကုန်ကျစရိတ်ကြီးမြင့်သည့် လောင်စာဆီသုံး စွမ်းအင်များအပေါ် ပိုမိုမှီခိုလာရသဖြင့် လုပ်ငန်းကုန်ကျစရိတ်နှင့် အစားအစာဈေးနှုန်း မြင့်မားလာစေသည်။ ကြီးမြင့်သော လောင်စာဆီဈေးနှုန်းနှင့် လုပ်ငန်းလည်ပတ်စရိတ်များကြောင့်

ကူးသန်းသွားလာရေးနှင့် ကုန်စည်ပို့ဆောင်ရေး အခက်အခဲများ တွေ့ကြုံရပြီး အစားအစားထုတ်လုပ်မှု ကုန်ကျစရိတ် ပိုမိုမြင့်မားစေသည်။

ကုန်သွယ်မှု

၂၀၂၃ ခုနှစ်တွင် မြန်မာနိုင်ငံသည် ပြည်ပ စားနပ်ရိက္ခာ ကုန်သွယ်မှု ကျဆင်းခဲ့ပြီး လေးနှစ်အတွင်း အနိမ့်ဆုံးအခြေအနေသို့ ရောက်ရှိခဲ့သည်။ ပို့ကုန်ဝင်ငွေ ဆိုင်ရာ မူဝါဒ၏ သက်ရောက်မှုကြောင့် ၂၀၂၀ ခုနှစ်ကတည်းက ဆန်စပါးတင်ပို့မှု ပမာဏ အနိမ့်ဆုံးဖြစ်ခဲ့သည်။ ပြည်ပပို့ကုန်အားလုံး ကျဆင်းလာမှုတွင် အဓိက ကောက်ပဲသီးနှံများအနက် ပြောင်းသည် ၂၀၂၃ ခုနှစ်အတွင်း ၃၁ ရာခိုင်နှုန်းအထိ အဆိုးရွားဆုံး ကျဆင်းလာခဲ့သည်။ ယင်းသို့ ကျဆင်းလာခြင်းတွင် ကမ္ဘာ့ပြောင်းဈေး ကျဆင်းလာခြင်းကြောင့်လည်း တစ်စိတ်တစ်ပိုင်း ပါဝင်ပါသည်။ ဝယ်လိုအားမြင့်တက်လာသောကြောင့် ပဲမျိုးစုံ ပို့ကုန်အနည်းငယ် ဦးမော့လာခဲ့သည်။ စားအုံးဆီတင်သွင်းမှုမှာ ၂၀၂၃ ခုနှစ်အတွင်း ၂၀ ရာခိုင်နှုန်းအထိ မြင့်တက်လာခဲ့သည်။ သို့ရာတွင် ကမ္ဘာ့စားအုံးဆီဈေး ကျဆင်းခဲ့သဖြင့် သွင်းကုန်တန်ဖိုး ကျဆင်းခဲ့သည်။ ဆန်စပါးအထွက်နှုန်းမြင့်မားလာသည့်အတွက် ဆန်စပါးပို့ကုန် မြင့်တက်လာနိုင်ခြေ ရှိသည်။ သို့သော် ပြောင်းတင်ပို့မှု အခြေအနေ အလားအလာမှာမူ ကမ္ဘာ့ပြောင်းဈေး ကျဆင်းခြင်းနှင့် ထိုင်းနိုင်ငံမှ ပြောင်းတင်ပို့မှု တားမြစ်ခြင်းကြောင့် ရေရာခြင်း မရှိပေ။

ကျပ်ငွေတန်ဖိုး ကျဆင်းခြင်းနှင့် နိုင်ငံခြားငွေကြေးလဲလှယ်နှုန်းမတည်ငြိမ်မှု ၊ ကုန်သွယ်ရေး မူဝါဒများက အစားအစာ သွင်းကုန်များ ရရှိနိုင်မှုနှင့် ဈေးနှုန်းအပေါ် သက်ရောက်မှုရှိပါသည်။ ၂၀၂၂ ခုနှစ်နှင့် နှိုင်းယှဉ်ပါက ဂျုံသွင်းကုန် တန်ဖိုးနှင့် ပမာဏ မြင့်တက်လာသည် (၄၉ ရာခိုင်နှုန်းနှင့် ၆၄ ရာခိုင်နှုန်းအသီးသီး)။ ၂၀၂၀ ခုနှစ်ကတည်းက ပြုပြင်ပြီး အစားအစာ တင်သွင်းမှု ကျဆင်းလာနေခဲ့သည်။ ကျပ်ငွေတန်ဖိုးကျဆင်းမှုနှင့် သွင်းကုန်လိုင်စင် ရရှိနိုင်မှုမလွယ်ကူခြင်း အပါအဝင် ကုန်သွယ်ရေး အခက်အခဲများ ဆက်လက်တည်ရှိနေသဖြင့် ၂၀၂၄ ခုနှစ်တွင် မရေရာမှုများ ဆက်လက် ကြုံတွေ့ နေဦးမည်ဖြစ်သည်။

အကြံပြုချက်များ

၂၀၂၁ ခုနှစ် စစ်အာဏာသိမ်းမှုနှင့် တဆက်တည်း ဖြစ်ပေါ်လာခဲ့သည့် ပဋိပက္ခကာလများအတွင်း မြန်မာနိုင်ငံရှိ ဆင်းရဲသောအိမ်ထောင်စုများ ရင်ဆိုင် ကြုံတွေ့နေရသည့် အခက်အခဲများ လျော့ပါးသက်သာ စေရေးတွင် ဖွံ့ဖြိုးရေး မိတ်ဖက်များ၏ ကဏ္ဍသည် အလွန်အရေးပါ ပါသည်။ ၎င်းတို့အနေဖြင့် ထိခိုက်လွယ် အိမ်ထောင်စုများအား အောက်ပါ နည်းလမ်းများမှတစ်ဆင့် ကူညီထောက်ပံ့မှုများ ပြုလုပ်နိုင်ပါသည်။

၁။ အရေးပါသည့် သွင်းအားစုများ ရရှိနိုင်မှု နှင့် လက်လှမ်းမှီ သုံးစွဲနိုင်မှု မြှင့်တင်ခြင်းဖြင့် လယ်သမားများ၏ အစားအစာ ထုတ်လုပ်နိုင်စွမ်းကို တိုးမြှင့်စေနိုင်သည်။ ဖွံ့ဖြိုးရေးမိတ်ဖက်များသည် မြန်မာ့စိုက်ပျိုးထုတ်ကုန် ထုတ်လုပ်ရေး ရေရှည် တည်တံ့စေရန် မျိုးစေ့ ၊ စက်ပစ္စည်းများ နှင့် ဓါတ်မြေသြဇာ ကဲ့သို့သော အရေးပါသည့် စိုက်ပျိုးရေးသွင်းအားစုများ ရရှိနိုင်ရေး အထူးသဖြင့် ဘေးကင်းလုံခြုံမှုမရှိသည့် ဒေသများနှင့်

ပထဝီအနေအထားအရ ဝေးလံခေါင်းပါးသည့် ဒေသများအတွက် ပိုမိုအားထုတ်သင့်သည်။ ဖွံ့ဖြိုးရေးအဖွဲ့အစည်းများသည် ဒေသခံအဖွဲ့အစည်းများနှင့် ပူးပေါင်း၍ ပဋိပက္ခပြင်းထန်နေသည့် ဒေသများအထိ သွင်းအားစုများ ဖြန့်ဖြူးပေးနိုင်ရေး လုပ်ဆောင်ခဲ့ကြသည်။ အဆိုပါလုပ်ငန်းများ ဆက်လက်လုပ်ဆောင်နိုင်ရန် ဘဏ္ဍာငွေကြေးနှင့် လုပ်ငန်းဆောင်ရွက်ရေး လမ်းညွှန်မှုများ အရေးတကြီး ထပ်လောင်း လိုအပ်နေပါသည်။ လက်တလောတွင် လူသားချင်းစာနာထောက်ထားမှုဆိုင်ရာ လုပ်ငန်းများအတွက် လိုအပ်သည့် ဘဏ္ဍာငွေ အမေရိကန်ဒေါ်လာ ၉၉၄ သန်း၏ ၁၀ ရာခိုင်နှုန်းကိုသာ ရရှိပါသေးသည်။ (OCHA 2024)

၂။ အထူးသဖြင့် ပဋိပက္ခဘေးဒဏ်သင့် ဒေသများ၌ ကာလတို အစားအစာရရှိနိုင်မှု တိုးတက်လာစေရန် ပိုမို အားထုတ်သင့်သည်။ အာဟာရပြည့် အစားအစာများ ဆုတ်ယုတ်လာမှုကို ရင်ဆိုင်နေရသည့် ချင်း၊ ရခိုင် ၊ ကချင်နှင့် ကယား ပြည်နယ်များကဲ့သို့သော ပဋိပက္ခဘေးဒဏ်သင့် ဒေသများတွင် အထူးသဖြင့် အမျိုးသမီးများနှင့် ကလေးသူငယ်များ ကြုံတွေ့ နေရသည့် စားနပ်ရိက္ခာ မဖူလုံမှုနှင့် အာဟာရ ချို့တဲ့မှု အန္တရာယ်ကို တားဆီးကာကွယ်နိုင်ရန် အစားအစာနှင့် အရေးပေါ် ထောက်ပံ့မှုများ အမြန်ဆုံးလုပ်ဆောင်သင့်သည်။ ၂၀၂၄ ခုနှစ်တွင် ပြည်တွင်းနေရပ်စွန့်ခွာ ရွှေ့ပြောင်းရသူများ (IDPs) ၊ ပြန်လည် ဝင်ရောက်လာသူများ နှင့် လက်ခံထားသည့် ဒေသခံများ အပါအဝင် လူပေါင်း ၁၂.၉ သန်း သည် အရေးပေါ် အစားအစာ ထောက်ပံ့မှုများ လိုအပ်နေသည်ဟု OCHA ကခန့်မှန်းတွက်ချက် ထားသည်။ လူပေါင်း ၁၁.၅ သန်းက အရေးပေါ် စိုက်ပျိုးရေးနှင့် သက်မွေးဝမ်းကျောင်းဆိုင်ရာ ထောက်ပံ့မှုများ လိုအပ်နေပြီး လူပေါင်း ၂၉၀,၀၀၀ ခန့်မှာ နှစ်မျိုးလုံး လိုအပ်နေကြောင်း ဆိုသည်။ UNICEF ကမူ ၂၀၂၄ ခုနှစ်တွင် မြန်မာနိုင်ငံရှိ ကလေးများနှင့် မိသားစုများအတွက် စားနပ်ရိက္ခာနှင့် လူမှုဖူလုံရေး အထောက်အပံ့ များ ပေးအပ်နိုင်ရန် အမေရိကန်ဒေါ်လာ ၂၆ သန်းခန့်လိုအပ်ကြောင်း ခန့်မှန်း တွက်ချက်သည်။ (UNICEF 2024) မိခင်နှင့် ကလေး ငွေသားထောက်ပံ့ရေး ကဲ့သို့သော အာဟာရပြည့်ဝရေးကို ထည့်သွင်း စဉ်းစားသည့် လူမှုဖူလုံရေးအစီအစဉ်များ တိုးချဲ့လုပ်ဆောင်ရန် လိုအပ်နေသည်။ မိုဘိုင်းဖုန်း အသုံးပြု၍ရသော ဒေသများတွင် ဒစ်ဂျစ်တယ်စနစ်ဖြင့် ငွေလွှဲပေးခြင်း သည် ထိခိုက်နိုင်ခြေ အမြင့်မားဆုံး အိမ်ထောင်စုများအား ကူညီရန် အကောင်းဆုံးနည်းလမ်းတစ်ခု ဖြစ်သည့်အတွက် ငွေသားရရှိနိုင်မှု တိုးတက်လာစေရန် အဆိုပါနည်းလမ်းကို အသုံးပြုနိုင်ပါသည်။ အိမ်ခြံဝင်းအတွင်း တနိုင်ငံပိုင် သီးနှံစိုက်ပျိုးခြင်းနှင့်အတူ ကြက် ၊ ဘဲ နှင့် ဆိတ် မွေးမြူရေး ကဲ့သို့သော အသေးစား မွေးမြူရေးလုပ်ငန်းများ ကို အားပေးခြင်း ဖြင့် အိမ်ထောင်စုများ အာဟာရပြည့်ဝသည့် အစားအစာ ရရှိစားသုံးနိုင်မှု၊ အမျိုးအမည်စုံ စားသုံးနိုင်မှုကို အထောက်အကူပြုသည့် ရေတိုဖြေရှင်းနည်းများ ကိုလည်း လုပ်ဆောင်နိုင်သည်။

1

INTRODUCTION

This report is a product of the World Bank's monitoring efforts in Myanmar and examines the country's agricultural sector performance and food security status. The report assesses the performance of the agricultural sector and food security in Myanmar, focusing on developments in main crops (cereals and legumes) and the livestock subsector, along with factors and risks affecting farm households' productivity. It also analyzes variations and price trends along the value chain, considering factors influencing production costs and constraints on accessing markets, such as conflict and transport disruptions. Additionally, it examines food trade trends, including the export and import flows of key commodities such as rice, legumes, and palm oil. The report also assesses local food security dynamics in conflict-affected communities and communities traditionally dependent on Non-Timber Forest Products (NTFP).

The report draws from primary and secondary data sources. A series of farmer phone surveys that reached up to 1,200 rural farm households is the primary data source, with survey rounds spanning the last four years. The report provides an update on Myanmar's agricultural sector and food security from July 2023 to June 2024. It builds upon previous monitoring reports released in June 2022 and June 2023 and provides essential insights for stakeholders addressing these pressing issues. The report also draws from key informant interviews with food vendors, fertilizer dealers, and rice millers; desk reviews of secondary data from agricultural news, official data, and policy documents on agriculture and food security, and market prices from various sources. Quantitative evidence from the survey represents the status of farm households in rural areas around food security, food access, dietary diversity, shocks and coping mechanisms, credit and indebtedness, farming costs, and difficulties. The annex presents further details on the methodology.

2

ECONOMIC OVERVIEW

Myanmar's economy continues to face significant challenges in 2024. The latest World Bank Myanmar Economic Monitor (MEM)[1] report found that elevated conflict, increased macroeconomic volatility, and a challenging business environment have constrained economic activity. In addition to its ongoing impacts on household livelihoods and agricultural production, conflict continues to disrupt land border trade with China and Thailand and domestic supply chains. The persistent depreciation of the kyat, coupled with constrained access to import licenses, has led to increased prices and shortages of essential imported inputs. Recurrent electricity outages have worsened, compelling firms to rely on expensive diesel generators, thereby increasing production costs. About 33 percent of firms surveyed by the World Bank in April 2024 reported power outages as their primary challenge, up from 12 percent in September 2023.

Recent indicators of economic activity have been subdued. GDP is estimated to have risen by just 1 percent in the year ending March 2024, still around 10 percent below pre-pandemic levels. In the April 2024 round of the World Bank Farmer Survey (WBFS), firms reported operating at 65 percent of their capacity on average – an improvement from September 2023 but still 10 percentage points below levels a year earlier. At the same time, some areas and industries have seen a reduction in labor supply, particularly in early 2024, due to labor movements within the country and across borders in response to conflict and fear of conscription. This combination of weakness in demand and supply has meant that real-time employment indicators have deteriorated in recent months.

Trade has also declined significantly, with disruptions at key land border posts playing a major role. In the six months leading up to March 2024, merchandise exports fell by 13 percent, and imports fell by 20 percent compared to the same period a year earlier. Excluding natural gas, exports through land borders declined by 44 percent, while manufactured exports

[1] This section draws upon the findings from the latest Myanmar Economic Monitor, the World Bank flagship report on the overall macro-economic situation in Myanmar (World Bank 2024c).

— largely garments and natural gas — also fell sharply. Imports via land borders declined by half, accounting for around 71 percent of the decline in overall imports. Trade with China and Thailand has been blocked or restricted at border posts under the control of armed groups. Border disruptions, import and foreign exchange restrictions, weaker domestic demand, and a shift toward the domestic production of (generally poorer quality) substitute items also contributed to the decline in imports.

The market exchange rate has depreciated sharply since the beginning of the year. The kyat has depreciated by about 20 percent against the U.S. dollar on parallel markets since the end of 2023; as of early June, the exchange rate was around 4,300 kyat per U.S. dollar. The spread between the official fixed reference rate (2100 kyat per U.S. dollar) and the parallel market rate widened around threefold from June 2023 to May 2024. Various administrative measures have been deployed to maintain a balance between foreign exchange supply and demand, including foreign currency surrender requirements, barter transaction arrangements, controls on non-trade related offshore payments, promotion of the use of foreign currencies other than U.S. dollars, and crackdowns on foreign exchange dealers that do not comply with regulated prices. Several of these measures — and the actions taken by businesses in response — have further reduced the availability of foreign currency to those unable to access regulated exchange rates, exacerbating depreciation pressures on the parallel market. At the same time, these measures have generally failed to mitigate persistent foreign currency shortages at regulated rates.

Inflation has remained persistently high, driven by rising food and fuel prices, reflecting the impacts of kyat depreciation on imported goods' prices. Headline consumer price inflation rose to 30.4 percent (year-on-year) in September 2023, with both food and nonfood inflation increasing. Fuel and transport prices have risen further due to both a pick-up in the global oil price and substantial pass-through from the depreciating exchange rate. Increased export prices, trade and logistics constraints, and disruptions in domestic production have also driven food inflation.

The cumulative impact of recent trends in economic activity, prices, and labor markets has put households under substantial pressure, with almost one-third of the population estimated to be in poverty at the end of 2023. The 2023–24 round of the Myanmar Subnational Phone Survey (MSPS) indicates that there has been a significant increase in the headcount, depth, and severity of poverty in Myanmar in recent years. The poverty rate is

estimated to be 32.1 percent in 2023–24, a reversion to levels last seen in 2015. At the same time, the depth and severity of poverty have worsened in 2023–24, meaning that poverty is more entrenched now than at any time in the last six years. Internally displaced populations (IDPs) are particularly vulnerable, with poverty rates as high as 48 percent.

While poverty is still higher in villages than in cities, urban poverty has increased more quickly than rural poverty over the last six years, with substantial declines in consumption among more-educated people. The increase in rural poverty between 2017 and 2023 is related to job losses in rural areas, particularly in agriculture. The share of the rural population employed in agriculture has declined from 43 percent in 2017 to 34 percent in 2023. Less-educated workers were more likely to move out of agricultural jobs and, therefore, lose the subsistence and shock-absorbing benefits of agriculture. Workers in manufacturing and services have experienced sharper reductions in consumption and increases in poverty than workers in agriculture.

The economic outlook remains very weak, implying little respite for households in Myanmar over the near to medium term. The business environment will continue to be constrained by conflict, trade and logistics disruptions, macroeconomic volatility, regulatory uncertainty, and power outages. Persistently high inflation, weak employment growth, declining real wages, and stretched household buffers will limit consumption and retail sales. The World Bank projects that the country's GDP in FY2024/25 will remain about 9 percent below FY2018/19 levels, in sharp contrast to the experience of other larger countries in the East Asia and Pacific region. Consumer price inflation is expected to remain high. With rising prices, ongoing constraints on incomes and employment, and rising informality, the outlook for household welfare and poverty reduction is bleak.

3

FOOD SECURITY

Concerns around food insecurity in Myanmar are high, aggravated by conflict and internal displacements.

The self-reported food insecurity of farm households in rural areas in Myanmar is still high and deeply concerning. The WBFS shows that a significant portion of households (42 percent) were worried about having enough food to eat in the last 12 months – albeit slightly lower than the previous year (figure 1) [2]. About 5 percent of households reported skipping meals because of food scarcity, an improvement on the previous year when 8 percent reported skipping meals. About 2 percent of households reported going a whole day without eating due to a lack of food. This severe level of food insecurity has remained the same over the past four years [3].

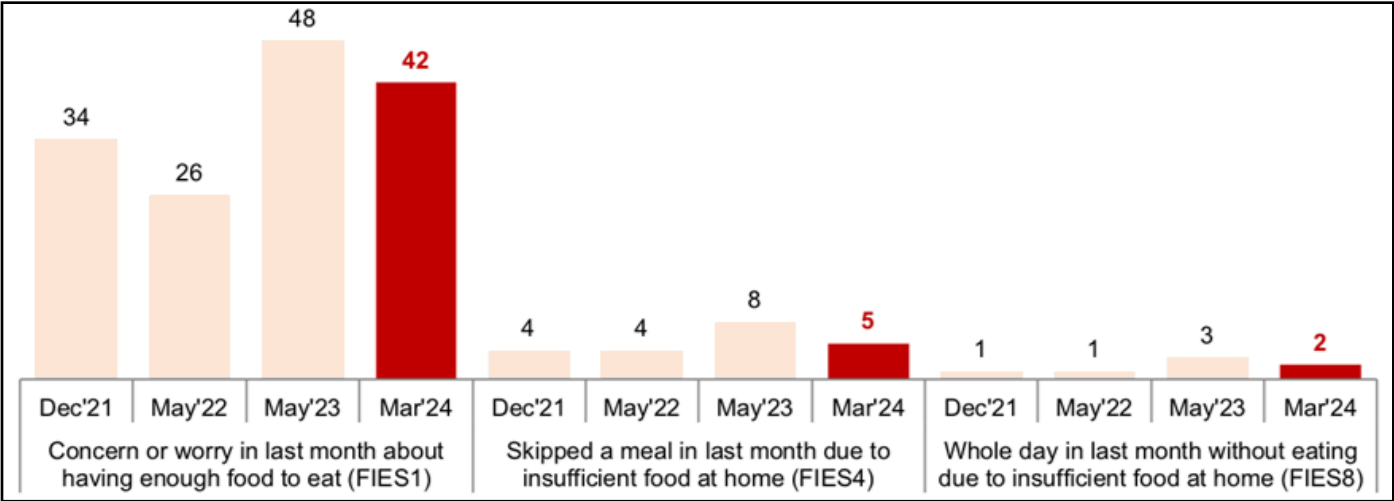


Figure 1: Farm households’ self-reporting on food security status (percentage of households)
Source: World Bank estimates using WBFS data.

[2] The percentage has slightly decreased compared to previous round (48 percent in 2023), yet the values remain high compared across the four rounds (34 percent in 2021, and 26 percent in 2022).

[3] Across the surveyed years, the percentage of households reporting this extreme experience remained relatively consistent, with only slight fluctuations. In 2021 and 2022, only 1 percent of households reported going a whole day without eating because they didn't have food.

Levels of acute food insecurity are highest among conflict-affected regions. Estimates from round 8 of the FAO-DIEM survey in December 2023 showed that 25 percent of households in Myanmar were acutely food insecure (FAO 2024a) [4]. This represents an increase of 2 percent from the previous year [5]. Food insecurity is particularly prevalent in conflict areas. WBFS data shows that Kayah exhibited the highest incidence of food insecurity, with 70 percent of households concerned about having enough food to eat [6], 16 percent reporting skipping meals, and 8 percent going a whole day without eating due to a lack of food. In Kayah, ongoing conflict and displacement are the prominent contributors to food insecurity, disrupting livelihoods, damaging crops and infrastructure, and impeding access to food and markets. The World Food Program (WFP) predicts that 2.7 million people will face acute food insecurity between June and August 2024, up from an initial projection of 2.4 million people. This worsening outlook is due to the intensified conflict since October 2023 (WFP and FAO 2024).

Internal displacements are increasing and having important impacts on food self-sufficiency across regions. The United Nations High Commissioner for Refugees (UNHCR) reports that as of May 2024, more than 3 million people in Myanmar are IDPs, of which 51 percent are women and girls (UNHCR 2024b). Since February 2021, the number of IDPs has grown by 2.73 million (UNHCR 2024a). Around 54 percent of the IDPs are in the Dry Zone, and nearly 24 percent are in the Hilly Zone (UNHCR 2024a) [7]. By state/region, 45 percent of the IDPs are in Sagaing, 8.8 percent in Magway, and 8.4 percent in Kayah. In April 2023, it was estimated that nearly 75 percent of the 1,478 million IDPs originated from rice-surplus areas of the country (table 1). For every three IDPs in Myanmar, two came from rice-surplus areas. This movement of IDPs is placing pressure on food self-sufficiency in recipient areas.

[4] As measured by the remote Consolidated Approach for Reporting Indicators of Food Insecurity (rCARI). rCARI is an aggregated food security index used to report on a population's comprehensive food security. The indicators used to calculate this are (a) food consumption scores, (b) livelihood coping mechanisms, (c) income sources, and (d) income changes due to the shock (FAO 2024a).

[5] Ibid.

[6] Followed by Chin (58 percent) and Tanintharyi (52 percent). Conversely, Mon region reported the lowest level, at 28 percent.

[7] See annex figure A.1 for a map of agroecological zones.

Table 1: Distribution and number of IDPs across Myanmar, May 2024

Agroecological zone	No. of IDPs	Percentage of IDPs	State/region	No. of IDPs	Percentage of IDPs
Dry	1,472,300	53.8	Magway	239,700	8.76
			Sagaing	1,232,600	45.04
Delta	201,600	7.4	Bago - East	200,900	7.34
			Bago - West	700	0.03
Hilly	651,500	23.8	Chin	80,000	2.92
			Kachin	58,100	2.12
			Kayah	131,600	4.81
			Kayin	230,800	8.43
			Shan - South	132,100	4.83
			Shan - North	18,900	0.69
			Mon	78,100	2.85
Coastal	411,300	15	Rakhine - North	37,000	1.35
			Rakhine - Central	151,200	5.52
			Tanintharyi	145,000	5.30
Total	2,736,700			2,736,700	

Source: WB estimates based on UNHCR data (2024a).

Conflict, transport disruptions, and kyat depreciation are driving elevated food inflation and impacting food costs, especially in insecure and urban areas.

Retail prices of food remain at record year-on-year levels and continue to rise monthly, affecting access to food. The most recent WFP figures on retail food prices show that price trends of locally sourced and imported food items have risen 54-78 percent year-on-year and are at record highs, with perishables behaving as outliers at both sides of the range of variations, i.e., tomatoes by 12.5 percent, and onions by 176 percent (table 2). Tomato is the only commodity whose price has been declining since November 2023 and is in line with historical prices. All other commodities surveyed (rice, palm oil, eggs, and onions) far exceed the prices from previous years on a month-to-month basis (figure 2). Compared with historical values, the variation rates of year-on-year prices are notably above the 3-year

average, except for palm oil and tomatoes. Available six-month projections by the WFP suggest a steady increase in prices, with a projected increase for rice (0.3 percent), chickpeas (2 percent), vegetables (16.7 percent for onions, 17.3 percent for tomatoes) and eggs (22.3 percent), and a minor decline for palm oil (0.9 percent).

Table 2: Variation and projections of retail prices by commodity, April 2024 (percentage)

	Variation				Projection
	1 month	3 months	6 months	12 months	6 months
Rice (low quality)	1.8	-2.4	20.6	54.7	0.3
Chickpea	3.7	16.1	39.1	77.5	2.0
Oil (palm)	-1.2	10.1	31.5	55.6	-0.9
Eggs (local)	0.0	13.6	44.1	57.1	22.3
Onions (local)	-12.0	-18.8	62.9	175.9	16.7
Tomatoes (local)	8.6	-31.7	-6.2	12.5	17.3
Basic food basket	2.5	2.7	24.5	58.4	--

Source: Variation rates based on WFP (2024). Projections from WFP.

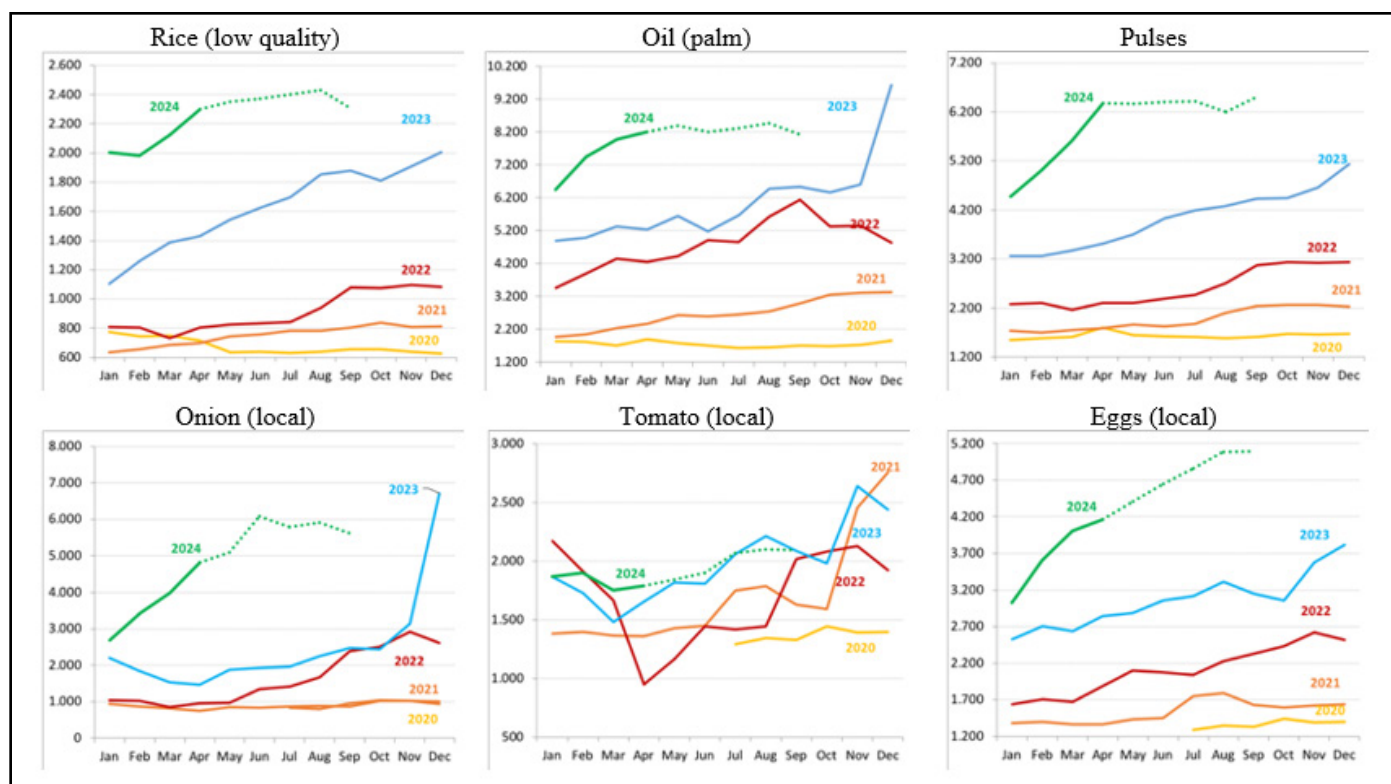


Figure 2: Food price and projections for selected commodities

Source: World Bank staff estimates with WFP datasets. Projections from WFP.

Note: Retail prices; kyat per kilogram/per liter/per 10 pieces. Dotted lines are projections.

The costs of common and healthy diets have risen and are highest in insecure areas.

According to IFPRI (2024a), between early 2023 and early 2024, the cost of a healthy and commonly consumed diet increased by 29 and 37 percent, respectively, with the main driver being increased rice prices [8]. The highest costs of common and healthy diets are seen in conflict-affected Rakhine, Chin, Kayah, and Shan states. In March 2024, the cost of the healthy and common diets in Rakhine were 60 and 31 percent higher, respectively, than the national average, while common diet costs were 11 percent higher in Chin and healthy diet costs were 9 percent higher in Shan. Healthy and common diet costs spatially adjusted for differences in casual wage rates are highest in Rakhine and Kayah. This finding indicates that healthy and common diet costs are the least affordable for wage earners in these states. Rakhine State saw the highest rate of food price inflation over the last 13 months. The costs of a common diet in March 2024 increased in Rakhine by a worrying 89 percent compared to

[8] Rice accounts for 51 percent of total calories consumed in urban areas and 62 percent of the total calories consumed in rural areas of Myanmar, making it a key component of overall food price inflation.

February 2023. This price increase is linked to movement restrictions and the recent conflict escalation.

Kyat depreciation, conflict escalation, and logistical disruptions underpin rising prices and food insecurity. A recent World Bank study concludes that the greatest price shocks occurred in imported food items like cooking oil because of the weakening kyat (World Bank 2024b). Geographically, retail food prices were highest in areas heavily impacted by accessibility restrictions due to conflict escalation and by geographical isolation: coastal Rakhine in the northwest, the border areas of Chin, the northern-most parts of Kachin, northern Shan with its Chinese border, and Sagaing in the northern-central area (World Bank 2024b). Pulses and nuts prices, for instance, were heavily affected by inflation, increased exports, and conflict escalation. Inflation rates of vegetables and fruits usually peak in the fourth quarter of the year at about 40 percent year-on-year. However, Rakhine State recorded price increases of almost 200 percent for vegetables and fruits in the third and fourth quarters of 2023 (World Bank 2024b).

Rising prices of food baskets are particularly hurting the poorest, especially in urban areas. According to WFP estimates, as of April 2024, the cost of the basic food basket (rice, oil, chickpeas, and salt) had been increasing by 2 percent month-on-month and remains 58 percent higher year-on-year. Evidence shows that households in the lowest income quartile in Myanmar spend 64 percent of their total consumption on food, compared with 43 percent in the highest income quartile (World Bank 2023). Therefore, food price inflation hits lower-income households relatively harder than higher-income households. IFPRI compared trends in urban construction and rural agricultural wages and showed that despite increases in casual labor wages, the rising cost of food outstripped increased earnings, making both common and healthy diets increasingly unaffordable for the most vulnerable consumers. The purchasing power of daily urban construction wages declined by 11 percent for healthy diets and by 15 percent for common diets. The purchasing power of rural agricultural wages fell by 7 percent for healthy diets and remained steady for common diet costs. The results indicate that food may be even more unaffordable for vulnerable wage earners in urban areas.

Agriculture provides an additional income buffer to rural households affected by higher food prices. A recent World Bank study concluded that agriculture helped cushion households against negative shocks (Sinha Roy and Weide 2024). In rural areas, household well-being levels declined as agricultural input price inflation surged. Rural employment

levels fell from 65 percent in 2017 to 55 percent in 2022, followed by a recovery of only 2.7 percentage points over the past year. Households with at least one member engaged in agriculture were much less likely to report income losses than households with no exposure to agricultural activities. Rural poverty would have been higher if the agricultural employment share in rural areas had declined further.

Authorities and professional associations have taken several actions to control the prices of some staple commodities. Actions by authorities include setting up an online platform to register warehouses and wholesalers involved in rice procurement, limiting imports, and imposing price ceilings for palm oil (World Bank 2024b). To contain the increase in domestic rice prices, the Myanmar Rice Federation (MRF) announced in February 2024 that it would prioritize the export of broken and parboiled rice to ensure a larger domestic supply of white rice (USAID 2024). The Myanmar Rice and Paddy Traders Association (MRPTA) set up a subsidy scheme in Yangon to sell rice at a lower price to relieve consumers. However, these measures have generally failed to stem the growth in food inflation.

Challenges in access to food have translated into a shrinking array of food consumed and poorer dietary diversity.

Farming households are as concerned about sustained access to food as they were during the previous three years. The prevalence of households facing challenges accessing food has not improved since 2021. The WBFS shows a relatively stable trend in households facing challenges accessing some foods (figure 3.a). The proportion of households reporting issues accessing food ranged from 25–29 percent in the last four years (27 percent in 2024). However, regarding accessing fresh produce (grains, meat, dairy, and fruit and vegetables), farm households are most concerned about transport and logistics issues, including travel restrictions (figure 3.b). Logistics challenges are particularly concerning in Chin State, where households have consistently reported the lowest rates of food access.

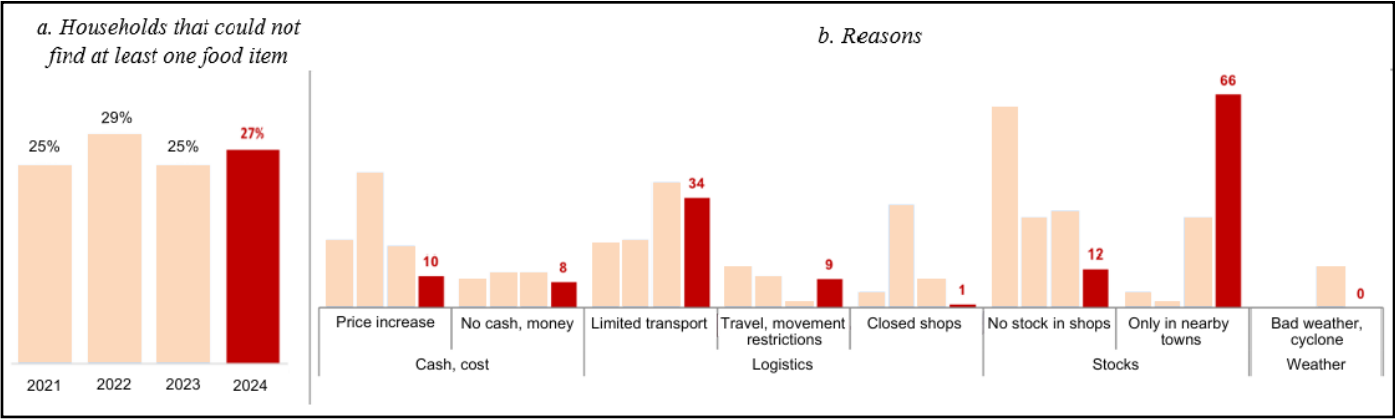


Figure 3: Overall findings for households' food access within the last week (percentage)

Source: World Bank estimates using WBFS data.

Note: Charts depict results from the previous three rounds in orange-colored columns (R1 from 2021, R2 from 2022, R3 from 2023). The last, red-colored column corresponds to data from round 4 (2024).

Households are experiencing a sharp decline in the variety of food groups consumed.

The FAO-DIEM survey in December 2023 showed inadequate food consumption within households increased compared to Jul/Aug 2023 (FAO 2024a; 2023). Low consumption of diverse food items is primarily due to poor market access, floods, reduced income, and low planting and harvesting rates (FAO 2024a). The WBFS found a sharp decline in the number of households that consume a variety of foods (figure 4). Grains and vegetables are still consumed the most. Between 50–75 percent of the households reported consuming fruits, pulses, fried foods, and proteins (eggs, fish, meat). Far fewer households (20–25 percent) frequently consume poultry, potatoes, nuts, and dairy. In fact, over the past four years, most food groups have been consumed less in households, save for fried foods (61 percent) and sweets and sugary foods (47 percent), indicating that households are gravitating toward more unhealthy foods.

The diversity of diets consumed in Myanmar has continued to deteriorate across all country regions since 2022. The WBFS reports a continued decline in the Household Dietary Diversity Score (HDDS)[9] over the past three years (figure 5). The national HDDS has dropped from 9.6 in 2021 to 7.4 in 2024. This drop affects all agroecological zones, with the

[9] The HDDS serves as a quantitative measure use to evaluate the variety of food consumed by households, commonly employed in nutrition and food security assessments. The HDDS assesses the availability and accessibility of food within households over a 24-hour period, determined by the number of food groups consumed during the assessment window.

Hilly Zone showing the worst deterioration. Across states, Chin (5.50), Rakhine (6.46), and Kachin (6.70) have experienced the worst decline in dietary diversity (figure 6 and annex table A.5). A higher HDDS is generally associated with better nutritional status and health outcomes, indicating a broader range of nutrients consumed. These striking results show that the nutritional status of households in Myanmar may be getting poorer. This finding raises concerns for child development and women’s ability to care for themselves and their children, especially in states affected by conflict, mobility restrictions, and rising transport costs.

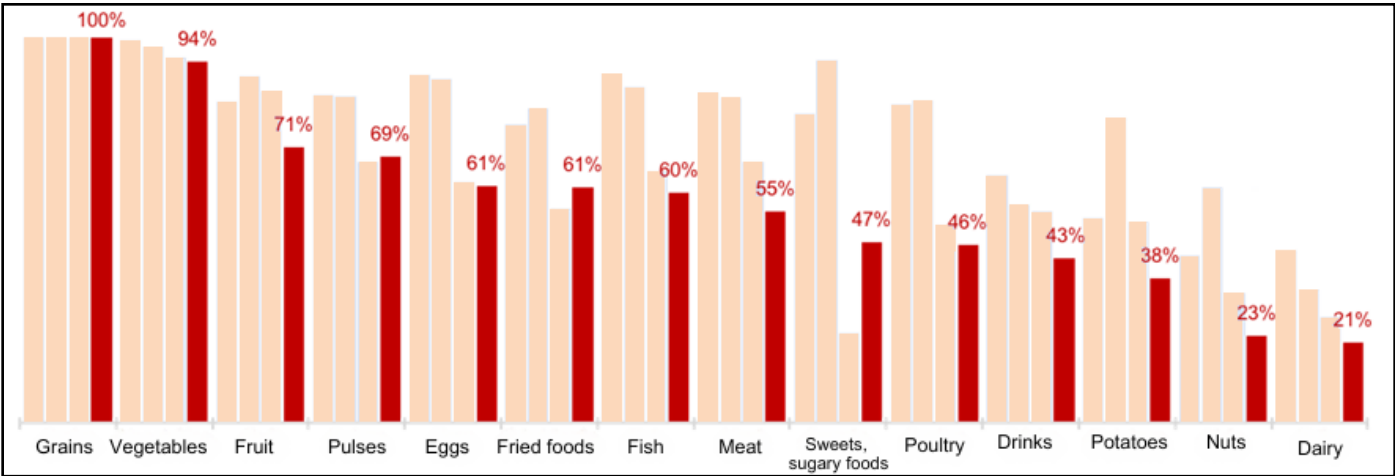


Figure 4: Households that consumed any of the following food items in the last 24 hours (percentage)

Source: World Bank estimates using WBFS data.
 Note: Charts depict results from the previous three rounds in orange-colored columns (R1 from 2021, R2 from 2022, R3 from 2023). The last, red-colored column corresponds to data from round 4 (2024).

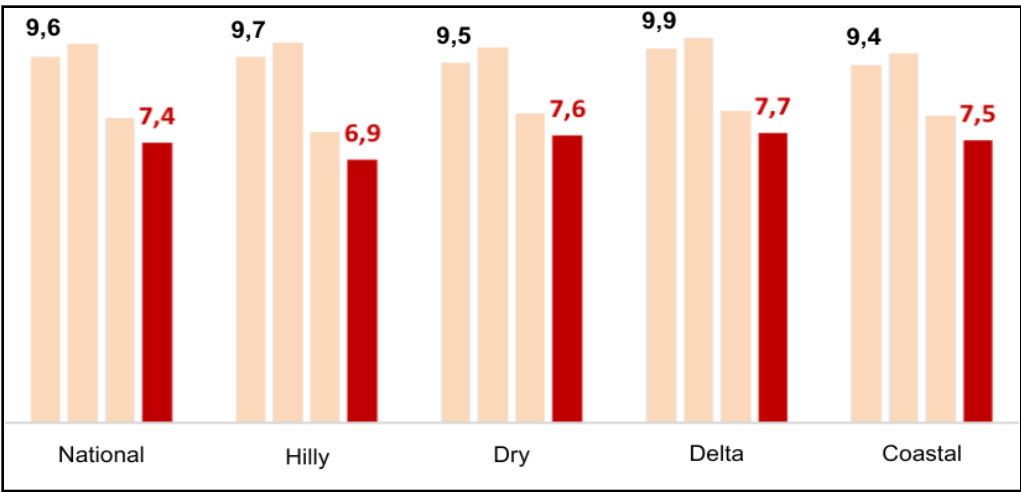


Figure 5: HDDS by agroecological zone

Source: World Bank estimates using WBFS data.
 Note: Charts depict results from the previous three rounds in orange-colored columns (R1 from 2021, R2 from 2022, R3 from 2023). The last, red-colored column corresponds to data from round 4 (2024).

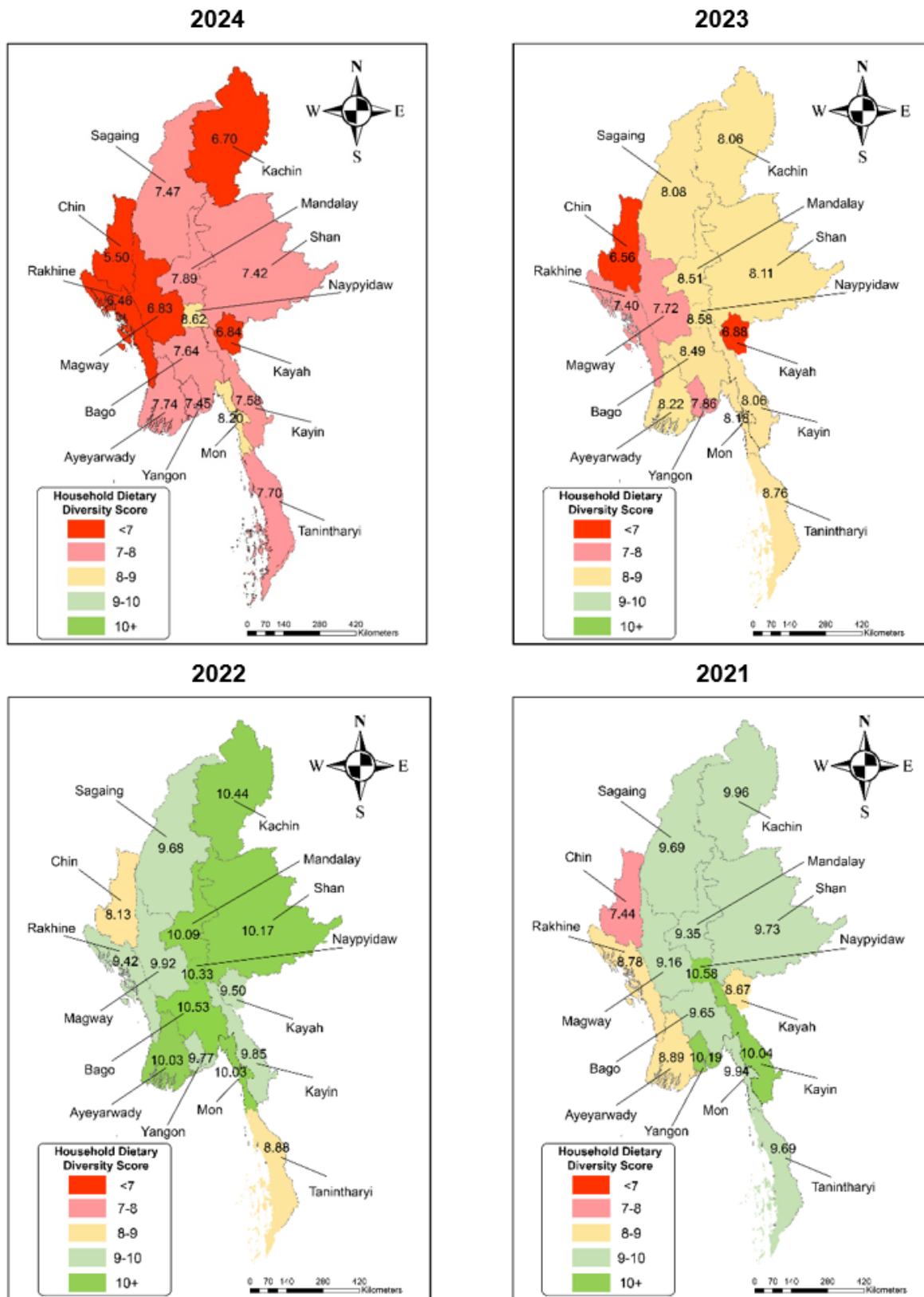


Figure 6: HDDS by region and state

Source: World Bank estimates using WBFS data.

Protracted shocks are exhausting livelihoods, forcing households to resort to negative coping strategies and explore alternative income sources.

Conflict is increasingly affecting more households with significant impacts on livelihoods. Armed conflict or violence is becoming more prevalent in rural communities across Myanmar. About 30 percent of surveyed households report experiencing conflict in their villages over the past 12 months, a notable increase from the previous years [10]. In 2023, 46 percent of households reported being fully unaffected by conflict and violence. In 2024, just 6 percent reported being unaffected. Among the affected households, over the last 12 months, 46 percent had their livelihoods “slightly affected”, 43 percent had “significantly reduced” incomes, while 5 percent had their livelihoods “totally depleted” [11]. These findings show the escalation of conflict and its growing impacts on communities (see also box 1).

[10] The Hilly Zone had the highest percentage of respondents reporting armed violence in their village (45 percent), while the lowest percentage was in the Delta (12 percent).

[11] Of particular concern is the situation in Kayah, where 22 percent of respondents reported a total depletion of their livelihoods.

Box 1: Rising food insecurity in conflict-affected areas of rural Myanmar

In February and March 2024, the World Bank conducted an in-depth qualitative study of 17 villages in 16 townships in conflict-affected areas of Myanmar. All reported declines in food security or concerns about future food security. Surveyed villages located in Rakhine, Tanintharyi, Chin, Kachin, Kayin, Ayeyarwady, Magway, and Sagaing reported that at least a handful of households in each village were frequently relying on charity, aid, or other villagers for their daily food. Factors contributing to rural food insecurity transportation restrictions, militarization, displacement, rising food prices, and decreasing local employment and market access.

IDP camps are the most food insecure. Since December 2023, roadblocks in Rakhine have isolated communities reliant on WFP rations, leading some organizations operating in the worst-affected townships to entirely switch aid provision to cash transfers. Traditional subsistence methods, such as growing vegetables or harvesting forest products, are challenging for IDPs with restricted movement. Military activities further limit access to fields, forests,

and markets, causing displacement and untended fields. In Tanintharyi, airstrikes have destroyed farmland and blocked streams.

Conflict is changing local agricultural practices. Farmers are selling produce quickly to pre-empt displacement or airstrikes and the loss of their harvest, or to pay off existing debts. Others are storing more crops than usual and selling less to combat uncertainties about being able to sow in the coming season. Villagers are opening new upland fields and growing home gardens to increase locally accessible food sources. They are also relying on natural fertilizers, cows, and human labor instead of anything that relies on external traders and transportation.

Since clashes increased in late 2023, increased military checkpoints and travel restrictions have worsened food security. Roadblocks in Rakhine and Chin have effectively cut off townships from the rest of the country, leading to increased commodity prices and shortages of key supplies such as animal feed, cooking oil, fertilizer, pesticides, petrol, and rice. Farmers can only sell crops locally for lower prices. Inland fisheries in Rakhine have stopped selling fish and prawns due to the unavailability of ice needed for transportation. Breeders cannot get animals to market or slaughterhouses. In some high-conflict areas, like Rakhine, movement restrictions have meant that breeders cannot feed their livestock due to credit, cash, and feed shortages. This has reduced animal health and milk production, impacting food security and incomes.

Increases in rice prices particularly impact food security in landless households and non-rice-producing villages. While villagers can often forage, garden, or take excess produce from neighbors to round out their food intake, rice is much harder to come by in villages with no rice production or only dry or upland rice. Such villages rely on purchasing rice from towns or traders, making them vulnerable to fluctuating rice prices. In non-rice-producing villages, day laborers and those in other vulnerable households primarily consume rice porridge and rely on donations from other households, reserving eating rice for days they earn money.

Within communities, there is wide variation in food security by occupation group. Landless households, female-headed households, households with no remittances, and day laborers are the most food insecure. These households often overlap, with female-headed households more likely to be landless and reliant on day labor for household income. Day

laborer households are often mobile, working across a village tract or even a district during harvest, commuting to towns for construction, or taking up seasonal work in different occupations and areas. Movement restrictions impact these already vulnerable mobile households the most.

Shocks appear to increasingly affect farming households, forcing farmers to resort to negative coping strategies, including borrowing money, selling assets, and reducing food consumption. The WBFS shows that 34 percent of households experienced a major shock within the past 12 months, a steady increase in the households experiencing shocks [12]. The FAO-DIEM survey (2024a) finds similar results nationwide. Among farm households, the most common shocks reported are an increase in food prices, illness, injury, or death of a household member, and decreases in salary or wages of household members (figure 7.a). The shocks have strained incomes and put access to food at risk. Farm households have relied on borrowing, selling assets, and reducing food consumption as coping strategies (figure 7.b). Borrowing from friends and family has been practiced by 46 percent of households, the highest over the past four years. Selling assets is practiced by 31 percent of households. Livestock is one of the key assets owned by farm households which has been disposed of as a coping strategy. The WBFS finds that 31 percent of households sold assets to pay for nonfood expenses or pay off existing loans, while 26 percent bought food (figure 8). Among the forest-dependent rural communities in Myanmar, however, NTFPs have contributed to food security by supplementing the local diet, with wild fruits, wildlife, and aquatic products serving as crucial food sources (box 2).

[12] Some 21 percent in 2021, 25 percent in 2022, 33 percent in 2023.

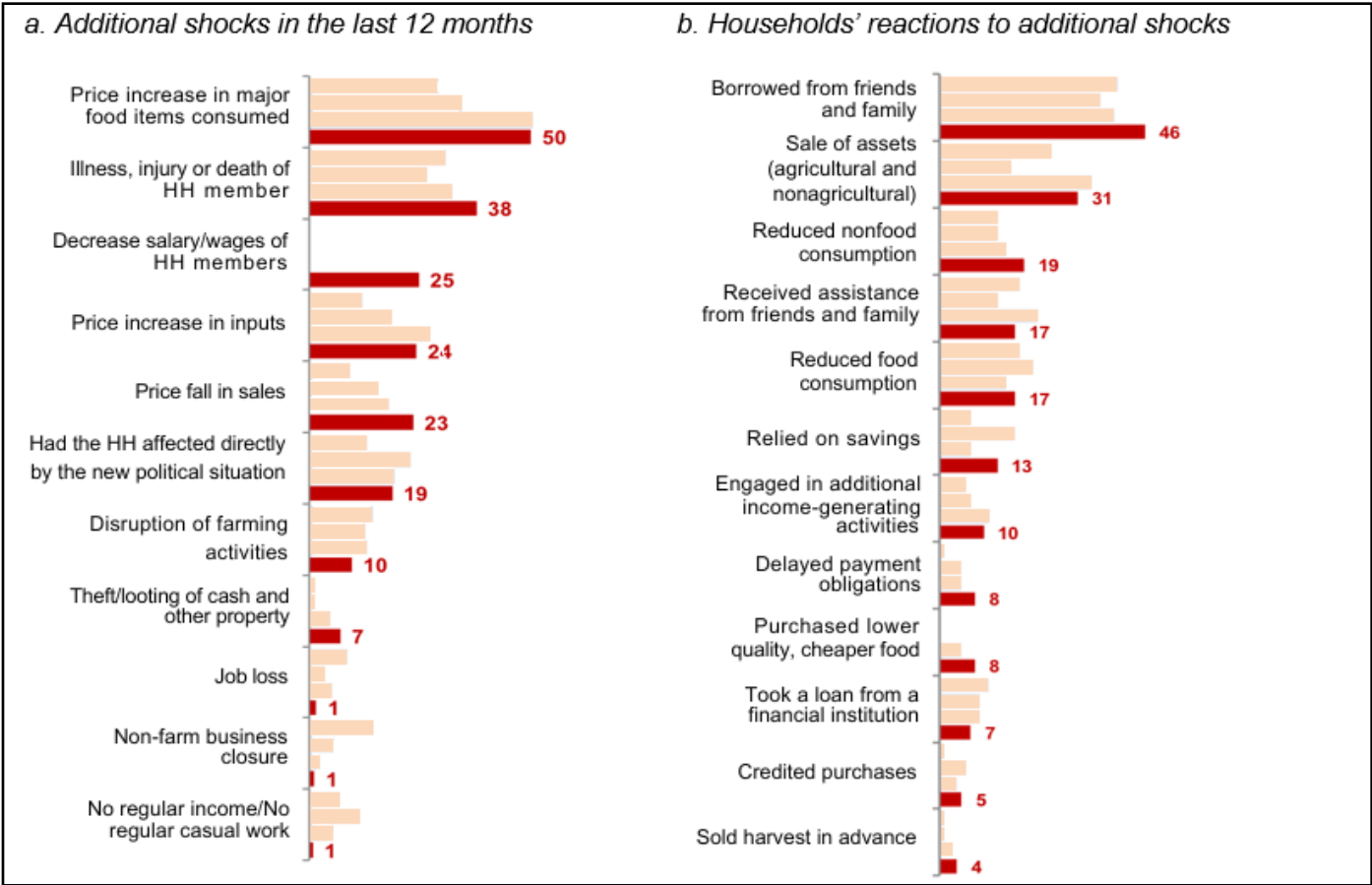


Figure 7: Households affected by additional shocks and reactions (percentage)

Source: World Bank estimates using WBFS data.
Note: Charts depict results from the previous three rounds in orange-colored columns (R1 from 2021, R2 from 2022, R3 from 2023). The last, red-colored column corresponds to data from round 4 (2024).

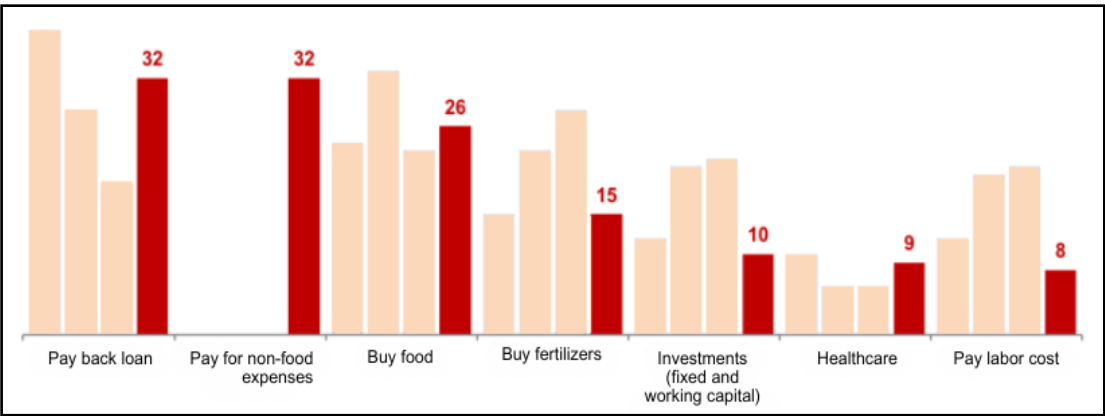


Figure 8: Purpose of liquidating assets (percentage of households)

Source: World Bank estimates using WBFS data.
Note: Charts depict results from the previous three rounds in orange-colored columns (R1 from 2021, R2 from 2022, R3 from 2023). The last, red-colored column corresponds to data from round 4 (2024).

Protracted conflict and other shocks have had particularly negative impacts on women and girls. In Myanmar, women-headed households have been negatively affected by the increased conflict. The International Labor Organization (ILO 2023) shows that 37 percent of women in Myanmar worked in agriculture in 2022 (down from 47 percent in 2017) despite only owning 18 percent of land (FAO 2024b). Conflict-related insecurity, which both disrupts goods and services and heightens competition for scarce resources, can have a particularly negative impact on food security for women and girls. Women are more vulnerable to gender-based violence, exploitation, and starvation (World Bank 2020). In Myanmar, 9.2 million women and girls are in urgent need of humanitarian assistance, and almost half the population is living in poverty (OCHA 2023). More women are using negative coping strategies than men to cope with shocks and food insecurity: this has been a notable trend over the last three years. About 13 percent more women borrowed from friends and family than men, and over 10 percent more women have reduced their food consumption compared to men. In addition, 4 percent more women than men have reduced their nonfood consumption (World Bank 2024a).

Box 2: The importance of NTFPs in Myanmar

NTFPs encompass a broad spectrum of resources categorized by utility. Commercially important products include bamboo, rattan, and palm leaves used for roofs, alongside wood-related items like charcoal and firewood for fuel. Medicinal resources such as bay leaf, bay bark, kan zaw oil (seed oil from an endemic plant), cordyceps and lingzhi contribute significantly to healthcare. Furthermore, fruits, edible bamboo worms, bamboo shoots, honey, elephant foot yam, forest vegetables, and aquatic products like fish, snails, clams, and prawns, support food security and community sustenance. Local communities showcase resourcefulness by repurposing materials like waste from betel nut shells into useful items, highlighting their ingenuity in using NTFPs.

Communities engaged in NTFPs derive income from various sources, including wage labor and the sale of NTFP products. Established value chains exist for some NTFPs like bamboo and rattan, while others, such as medicinal plants are sold informally. NTFPs supplement local diets, with wild fruits, wildlife, and aquatic products serving as crucial food sources. In Kachin State, NTFPs like cordyceps and lingzhi are a primary income stream, especially through cross-border trade with China. Coastal areas like Ayeyarwady and Tanintharyi rely heavily on NTFPs such as crabs and prawns, providing vital livelihood opportunities, particularly for landless individuals or marginalized communities. Products like myin-nga-pi — a type of fish paste derived from mangroves — sustain communities in Tanintharyi, while honey and bird nest collection in Myeik and Kawthaung Districts provide financial resilience. In upland areas like Chin State and Shan State, NTFPs serve as secondary or tertiary income sources, while remittances and farming activities are primary sources. Despite their secondary role in income generation in some areas, these products also supplement household consumption and cultural practices.

NTFPs are crucial for bolstering community resilience during crises. Bamboo, for example, is used for immediate shelter construction in natural disasters, as seen in the Ayeyarwady Delta. By diversifying their livelihoods and relying on NTFPs during crises, communities are more resilient to disasters. For instance, communities in Gwa Township, Rakhine State, turned to NTFPs such as bamboo shoots, vegetables, snails, and crabs for food when wild elephants destroyed paddy fields.

Mangroves provide vital services beyond NTFPs, including coastal protection, ensuring long-term resilience. Communities like those in Konyangon Township, Yangon Region, highlight the significance of mangroves and forest conservation for survival, as mangroves

serve as natural barriers against cyclones and provide essential livelihood resources in areas like Pyapon and Yepyu Township.

Accessibility to NTFPs varies across regions due to legal restrictions and security concerns. In Northern Shan State and Bogalay Township, armed groups and legal regulations restrict local communities' access to forests and protected areas, complicating NTFP collection efforts. Despite such constraints, illegal access to restricted areas persists, highlighting the complexities surrounding NTFP collection during conflict periods. Unsustainable harvesting and increasing demand in conflict-affected regions are depleting crucial NTFPs like bamboo, rattan, cordyceps, and medicinal plants, contributing to environmental degradation.

During conflict periods, shift in NTFP collection reflect changing market trends and emerging products, raising concerns about environmental degradation. Villagers resort to collecting and selling alternative products like Quaxog clams (pa-u) to meet market demands, leading to mangrove destruction and intensified charcoal production. Illegal fishing activities by large vessels further strain coastal ecosystems.

Declining NTFP availability significantly affects livelihoods and food security, particularly in remote areas. In Kachin State and Puta O, for example, NTFPs like elephant foot yam and u-lai (palm-like tree) become vital food sources during transport disruptions. Local communities also adapt by mixing local maize and rice when pests destroy paddy fields, exemplifying their ability to cope with food insecurity.

NTFPs are crucial for sustaining livelihoods, ensuring food security, and fostering resilience within Myanmar's forest-dependent communities. Safeguarding vulnerable populations' well-being and promoting environmental sustainability in Myanmar by addressing forest degradation and ensuring sustainable management of NTFPs is vital.

4

PRODUCTION

Notwithstanding the protracted shocks and uncertainties, the agriculture sector has proved to be resilient at the aggregate level.

Rice productivity has improved by about 7 percent between the monsoon seasons of 2022 and 2023. By April 2024, the planted area for dry season paddy accounted for 1.04 million hectares, which is 99 percent of the national planned area for the season (1.05 million hectares) (AFSIS 2024). The United States Department of Agriculture (USDA) estimated a modest 0.9 percent year-on-year increase in paddy production area. Evidence from IFPRI shows that average rice yields improved during the 2023 monsoon (1,240 kilograms per acre) and were 7 percent higher than the same time the previous year (1,169 kilograms per acre). While yields varied significantly across the country, ranging from 800 to 1700 kilograms per acre, the overall yield remains 4 percent below 2020 levels (1,285 kilograms per acre). USDA estimates show that while rice performance improved nationally from last year, yields are still 3.6 percent lower than the five-year average (figure 9). The Ayeyarwady region, the country's prime rice-producing area, experienced an 11 percent increase in rice productivity. Such a regional productivity increase could partly stem from past efforts to embed rice-fish, rice-rice, and rice-pulse systems into the region and the use of higher fertilizer levels, high-yielding rice varieties, and improved farming techniques.

Maize shows the most resilience and has continued to perform better than other crops. For 2023–24, the USDA estimates an increase in cultivated maize area (1.5 percent), production (7.5 percent), and yield (6 percent). The soybean production area is estimated to drop by 4.0 percent and production by 3.8 percent relative to the previous year. However, the yield is expected to remain roughly the same at 0.2 percent. Estimates for peanuts show a small year-on-year increase in production area (0.5 percent) but a significant drop in production (5.8 percent) and yield (6.3 percent) compared to last year. Relative to the average of the previous five years, maize, soybean, and peanut yields are estimated at 2.4 percent higher, 0.4 percent higher, and 4.7 percent lower, respectively (figure 9 and annex table A.3).

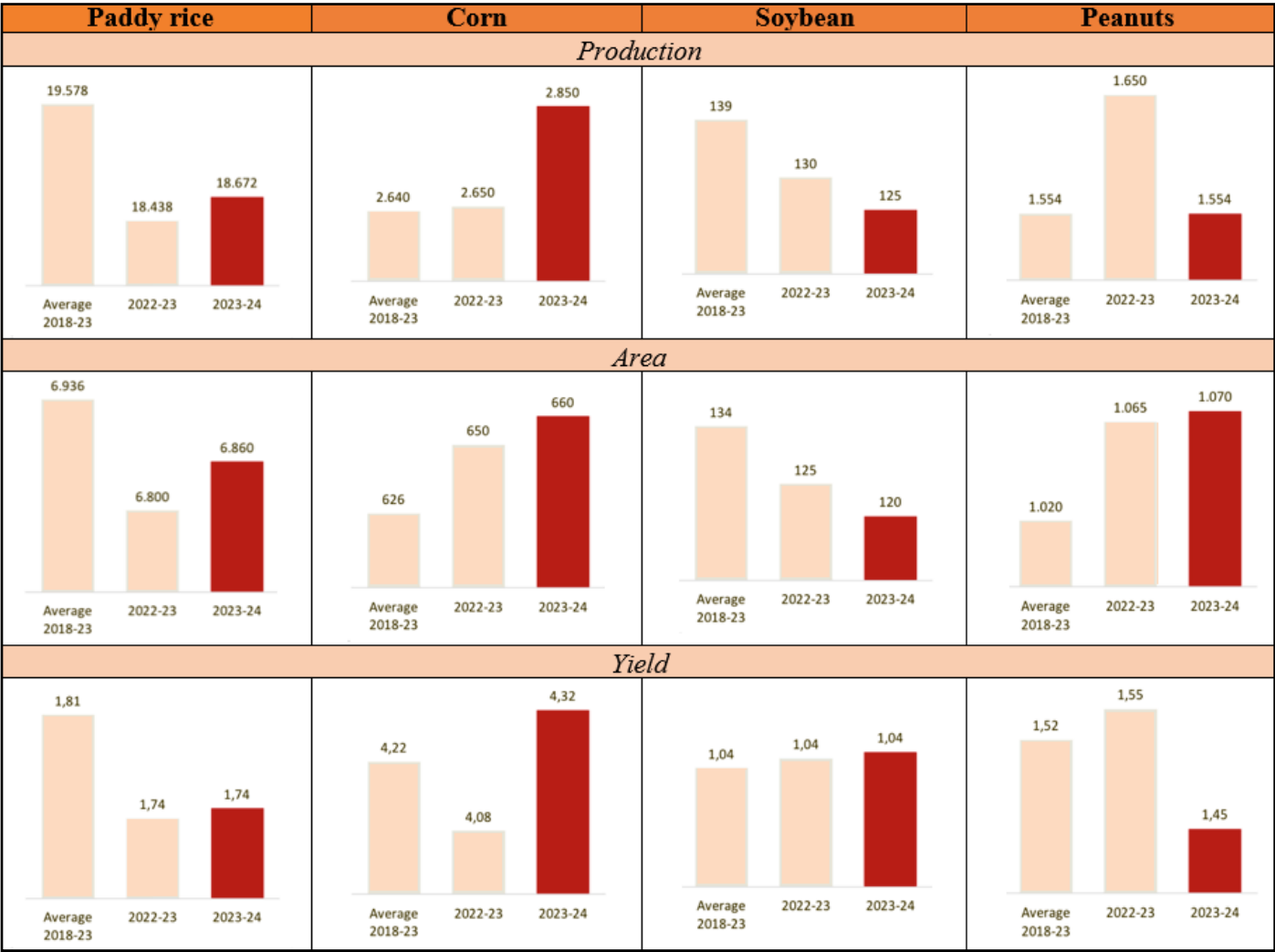


Figure 9: Production, area and yields in selected crops in Myanmar (2018–24)

Source: USDA estimates.

Note: Production in 1,000 tons. Area in 1,000 hectares (ha). Yields in tons per hectare. For paddy rice, production and area are for paddy (rough product), yields for rice (milled basis).

Domestic production of rice in Myanmar continues to surpass domestic consumption, leading to a national surplus. According to official statistics from the Ministry of Agriculture, Livestock and Irrigation (MOALI), the country’s rice self-sufficiency improved in the 2022–23 agricultural year, showing resilience despite challenges. Domestic rice production was sufficient to cover domestic consumption 1.57 times, which is higher than in the previous two seasons (1.53 times in 2021–22 and 1.50 times in 2020–21) (table 3). The improvement is mainly due to a 1.9 percent increase in production and a 0.8 percent decline in consumption. The consumption decline is attributed to conflict, adjustments in consumption following high rice prices, and population displacement.

Aggregate rice-surplus values mask the difference between regions, which underscores the need for smooth transport and distribution to close food access gaps. About as many states and regions are experiencing a rice surplus as a rice deficit in Myanmar (table A.4). However, production in rice-surplus areas (1,110.76 million baskets of paddy) is nearly five times higher than in rice-deficit areas (229.07 million baskets). Consumption in regions and states with a surplus (521.35 million baskets of paddy) is barely 1.6 times higher than in those with a deficit (331.55 million baskets). In rice-surplus areas, for every basket of paddy consumed, 2.13 baskets are produced. Yet for every basket of paddy consumed in rice-deficit areas, only 0.7 baskets are produced. Given the figures above, while enough rice is produced to supply states with a rice deficit, transport and logistics are the main challenges for food distribution.

Table 3: Non-adjusted and adjusted rice sufficiency

	World Bank estimates							CSO estimates	
	Non-adjusted rice sufficiency		IDPs (April 2023)			IDP-adjusted rice sufficiency		Net balance	Status
	Net balance	Status	Outgoing flows	Incoming flows	Net flows	Net balance	Status		
Total	4,708	Surplus	1,477,500	328,000	-1,149,500	4,869	Surplus	5,311	Surplus
Surplus areas			1,100,700	313,700	-787,000	5,903		7,153	
Deficit areas			376,800	14,300	-362,500	-1,034		-1,842	

Source: World Bank estimates based on Central Statistical Organization (CSO) and UNHCR data.
Note: Net balance, in million tons of rice. For more detailed state and region data, see annex table A.4.

At the household level, however, production shocks and concerns around food availability are pushing more farmers to withhold their produce.

Progress in harvesting lagged behind previous years, though the number of farmers who could harvest recovered. In April 2024, 38.5 percent of the planted area had been harvested, which is lower than the same time over the past four years (40.4 percent in 2023, 39.9 percent in 2022, 44.7 percent in 2021, and 45.1 percent in 2020) (table 4). However, dry-season rice was harvested timeously in areas where planting began earlier, mainly in the Delta region (AFSIS 2024). The WBFS finds that most farmers (97 percent) managed to harvest their crops this past season, a return to 2021 levels after a couple of years of decline – only 68 percent reported they could harvest in 2023, compared to 81 percent in 2022, and 96 percent in 2021.

Table 4: Progress in annual harvesting of paddy (percentage of planted area)

	2020	2021	2022	2023	2024
Dry season (April)	45.1	44.7	39.9	40.4	38.5
Monsoon season (Dec)	53.3	56	60.5	60.1	

Source: World Bank staff estimates based on data from various AFSI RGO reports (AFSI 2020–24).

Note: For more data on progress in paddy planting and harvesting, see annex table A.2.

Farming households reported crop yield losses from production shocks; however, reported losses were lower in key rice-producing regions and higher in insecure areas. The WBFS found that 47 percent of farm households reported some yield loss during the 2023 monsoon season, i.e., May 2023–January 2024. Average yield losses ranged from a low of 28 percent in Ayeyarwady to a high of 47 percent in Kayah. Yield losses were due to drought and excessive rains, which were reported by 60 percent of respondents. Some 31 percent of respondents also reported an uptick in pest and plant diseases from flood-related waterlogging. Additional evidence from Naing (2024) for IFPRI shows that 30 percent of paddy farmers reported being impacted by climatic or other production shocks during this monsoon, with floods and droughts significantly harming yields. Out of the farmers affected by floods, 32 percent reported lower yields. If affected by droughts, the percentage of farmers reporting lower yields in 2023 grew to 51 percent. Some 11 percent of farmers identified higher prices of fertilizers or their inaccessibility as a key issue affecting crop yields, while

4 percent identified workforce shortages.

More farmers are withholding their harvest for home consumption and future planting.

Out of the farmers who could harvest this past season, nearly 85 percent sold at least part of their harvest, while 58 percent stored at least some. While the share of farmers selling their harvest has consistently ranged between 81–88 percent over the past four years, the share of farmers choosing to store their produce increased (32 percent in 2022, 38 percent in 2023) as food availability concerns rose. The stored harvest is mostly for home consumption and later sowing. Some 82 percent of households who stored their produce identified home consumption as a reason, far more than the 63 percent of households who did so in 2023. For households that had worried about food availability in the last 12 months, the number of farmers withholding their produce grew to 86 percent. This finding indicates that a growing number of households are prioritizing food self-sufficiency and food security by retaining a portion of their harvest. Some 18 percent of households identified future planting as a reason for withholding produce. IFPRI evidence shows that farmers are indeed relying less on markets for seeds, with nearly 61 percent of farmers using saved seeds from previous years.

Fertilizer supply and use have increased, while isolation, conflict, and other shocks are restricting access to inputs and services and increasing prices.

Fertilizers are more available, and their use by farmers has risen back to 2020 levels.

During the 2023 monsoon season, fertilizers and pesticides were more available than in 2022. Over that period, urea and compound fertilizer prices decreased by 50 percent and 38 percent, respectively, compared to 2022, reducing production costs. Fertilizer imports increased by 78 percent from January to October 2023 compared to the same period in 2022. Retailers reported higher fertilizer sales in 2023 compared to pre-pandemic sales. During this past monsoon season, fertilizer use rose by 20 percent (Minten 2024). During the 2023 dry season, the fertilizer application rates rose by 33 percent, driven especially by higher urea application rates in response to higher paddy prices (IFPRI 2023b).

Regional disparities exist in farmers' ability to access agricultural inputs, with farmers in insecure regions and areas affected by flooding still facing challenges. Farmers' access to agricultural inputs, especially cash crops, vegetables, fruits, and livestock (swine and cattle), has deteriorated (FAO 2024a). The FAO-DIEM reports that 4 percent of households could not access crop inputs or animal feed, largely due to the increasing isolation of rural

households, conflict, and flooding (FAO 2024a). IFPRI analysis of the 2023 dry season shows that almost half of all seed purchases nationally were from neighboring farmers rather than markets, while access to seeds has significantly declined in conflict areas: the share of farmers in Kayin State purchasing seed for use in the 2023 dry season fell by 19 percentage points, by 15 percentage points in Tanintharyi, 14 percentage points in Kayah, and 13 percentage points in Chin (IFPRI 2023b).

Conflict has significantly affected farmers' access to extension services. During the 2023 dry season, extension access was noticeably lower than the previous year (IFPRI 2023b). In-person extension services from public, private and NGO sources declined for cereals, oilseeds, and pulses. The only exception was private extension for groundnut, where activity was still vibrant. NGO extension services have sharply reduced and are virtually non-existent for some crops. Increases in mobile extension access in the country have been modest and are unlikely to compensate for the reduction in in-person extension services. The lack of access to extension services affects farmers' ability to continue farming productively.

The number of farmers facing challenges in preparing for the season is rising.

After years of decline, the number of farmers expecting challenges with sowing has doubled. Conflict, geographical conditions, and limited resource access are affecting sowing activities. Results from the WBFS show that nearly half of respondents (46 percent) expect difficulties sowing in the coming season. The number of farmers concerned about planting in the upcoming season has almost doubled from the previous year and is the highest since 2021 (38 percent in 2021, 32 percent in 2022, 24 percent in 2023) (figure 12.b). Such anxiety could be related to farmers having nearly exhausted their coping mechanisms after three years of conflict and hardship. Conflict has also underpinned farmers' decisions about sowing in some locations. The highest prevalence of farmers reporting operational difficulties is in Kayah (92 percent of households) and Rakhine (72 percent). In these locations, ongoing conflict, geographical conditions, and limited resource access are major obstacles to sowing activities. About 15 percent of respondents to the WBFS reported that conflict affected their ability to sow because of safety concerns (55 percent), internal displacement (13

[13] The WBFS report categorizes the results into four agroecological areas in Myanmar: the Dry Zone comprises Sagaing, Magway, Mandalay and Nay Pyi Taw; the Coastal Zone spans Rakhine, Mon, and Tanintharyi; the Delta Zone encompasses Bago, Yangon, and Ayeyarwady, and the Hilly Zone, which encompasses Kachin, Kayah, Kayin, Chin and Shan States. See also annex figure A.1 for a map of agroecological zones.

percent), or disruptions in transportation and logistics (11 percent). These challenges are more frequently reported by farmers from the Hilly and Coastal Zones (25 percent and 21 percent, respectively) [13]. The reduction in cultivated land is especially prevalent among the farmers in Kayah (26 percent).

Farmers have better access to financing for working capital, but more indebted borrowers are in financial distress.

Access to credit and rural finance has improved overall, with a growth in credit from input retailers. The WBFS shows that for the ongoing dry season (2024), only 9 percent of overall respondents faced hurdles in obtaining credit from input suppliers – a downward trend since 2021 (38 percent in 2021, 32 percent in 2022, and 18 percent in 2023). Farmers have a growing selection of credit providers ranging from Myanmar Agricultural Development Bank (MADB), microfinance institutions, private banks, money lenders, and input suppliers. However, the share of farmers taking credit from these institutions has declined, excluding input suppliers; the latter more than doubled their share of farmers receiving credit (IFPRI 2023b), highlighting again the challenges in sourcing inputs and

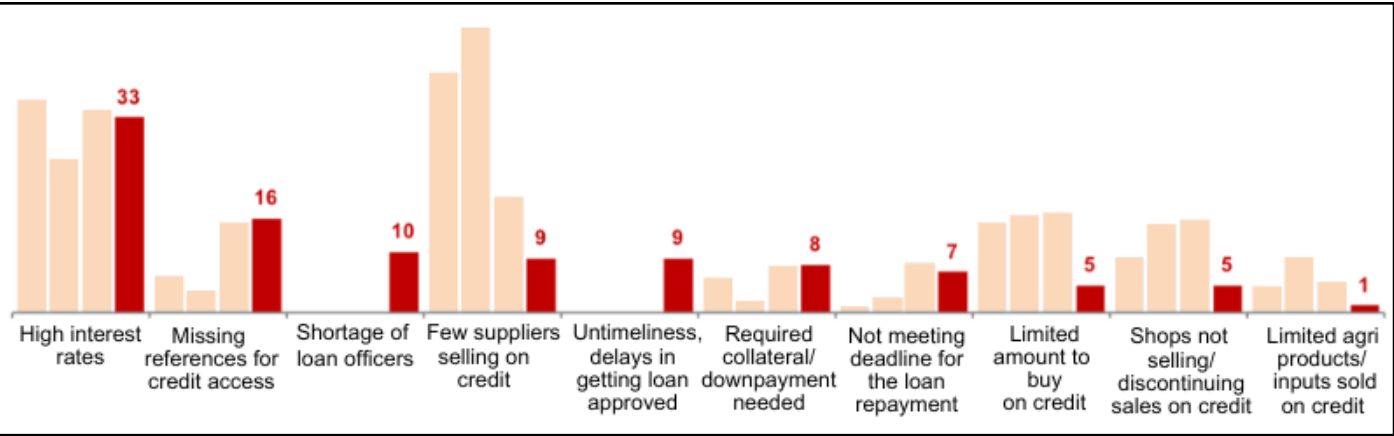


Figure 10: Reported issues in obtaining credit from input suppliers (percentage of households), 2021–24

Source: World Bank estimates using WBFS data.
 Note: Charts depict results from the previous three rounds in orange-colored columns (R1 from 2021, R2 from 2022, R3 from 2023). The last, red-colored column corresponds to data from round 4 (2024).

still consider interest rates high, while 16 percent consider the need to provide references to access credit a significant hindrance (figure 10).

Although fewer farmers are indebted than in previous years, the repayment capacity of indebted farmers has deteriorated, compromising solvency. Fewer farmers (51 percent) report having outstanding loans, a continuation of the declining trend of indebtedness that began in 2021 (62 percent in 2021, 57 percent in 2022, and 54 percent in 2023). However, the number of farmers who cannot repay the interest or principle of their loans has doubled to 29 percent in 2024, relative to an average of 15 percent over the previous three years (figure 11). As the economic conditions affecting farmers’ ability to repay loans have worsened, a significant segment of borrowers are experiencing financial distress, which may affect their food production ability.

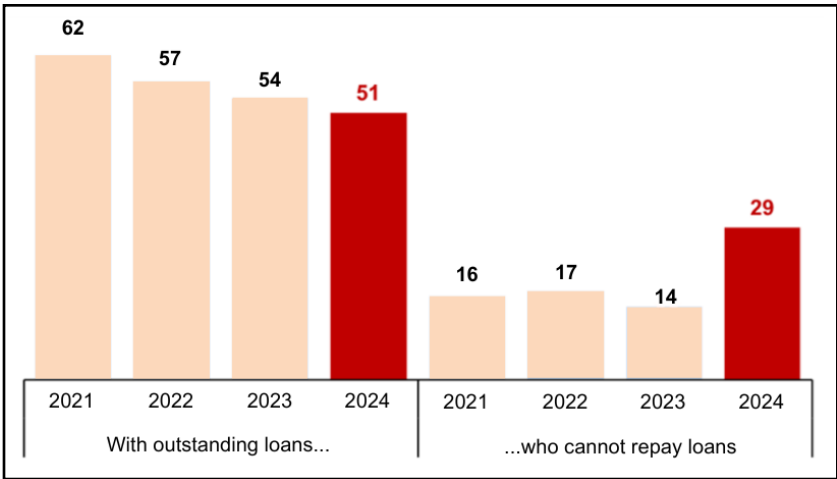


Figure 11: Indebtedness and solvency in farm households (percentage of households)

Source: World Bank estimates using WBFS data.
Note: Charts depict results from the previous three rounds in orange-colored columns (R1 from 2021, R2 from 2022, R3 from 2023). The last, red-colored column corresponds to data from round 4 (2024).

5

PRICES

Insecurity correlates with higher agriculture input prices, raising operational costs and lowering farmers' profitability.

High prices of agriculture inputs are a considerable challenge, especially in remote and conflict-affected areas. Prices of agricultural inputs were higher than the year before: there was a 20 percent increase in plowing costs, 19 percent for wages (men), and 23 percent for wages (women) (Minten 2024). Inputs were particularly costlier in insecure areas. Cost differences in secure and insecure areas were pronounced for fuel (22 percent costlier in insecure areas), plowing (21 percent), combine harvesting (8 percent), and wages (men, 9 percent; women, 11 percent). Conversely, farm prices were not higher in insecure areas, reducing farmers' margins. Although fertilizer prices came down significantly across the country, they were still a frequently highlighted challenge to production in hilly and mountainous areas due to the distance from national fertilizer entry points. As such, isolated and conflict-affected areas are using fewer inputs, and many farmers are replacing chemical inputs with manure and compost (box 1).

Prohibitive feed costs have driven up livestock production costs, forcing farmers to reduce livestock heads and make distress sales. The FAO-DIEM survey (2024a) shows that livestock farmers are facing challenges, including conflict and floods (31 percent of flood-affected households lost cattle, and 49 percent lost swine [14]) and livestock diseases, especially in cattle and poultry. However, the cost of feed remains the most common challenge for livestock farmers. Farmers are finding livestock rearing less profitable and are responding by reducing herd size. As per FAO-DIEM (2024a), 53 percent of producers now have fewer animals than they did 12 months earlier. While only slightly higher than in December 2022 (50 percent), it shows a continuing trend of smaller herd sizes. More poultry producers (63 percent) and cattle producers (54 percent) report decreasing their herd size. This trend is

[14] Following any of those shocks, losses included hatches and pens for 20 percent of households and of feed/fodder (16 percent of households) (FAO 2024a).

explained by more frequent commercial and distress sales across all livestock types. Swine production is under the most distress. Swine production is increasingly unaffordable and unprofitable for farm households, leading many to replace their swine herds with chickens, which are cheaper to feed.

Fuel and labor prices have increased, raising farmers' operational costs. A substantial majority of farmers surveyed through the WBFS experienced higher unit costs of harvesting (84 percent) and transport (86 percent) compared to the previous years (figure 12.a) [15]. A

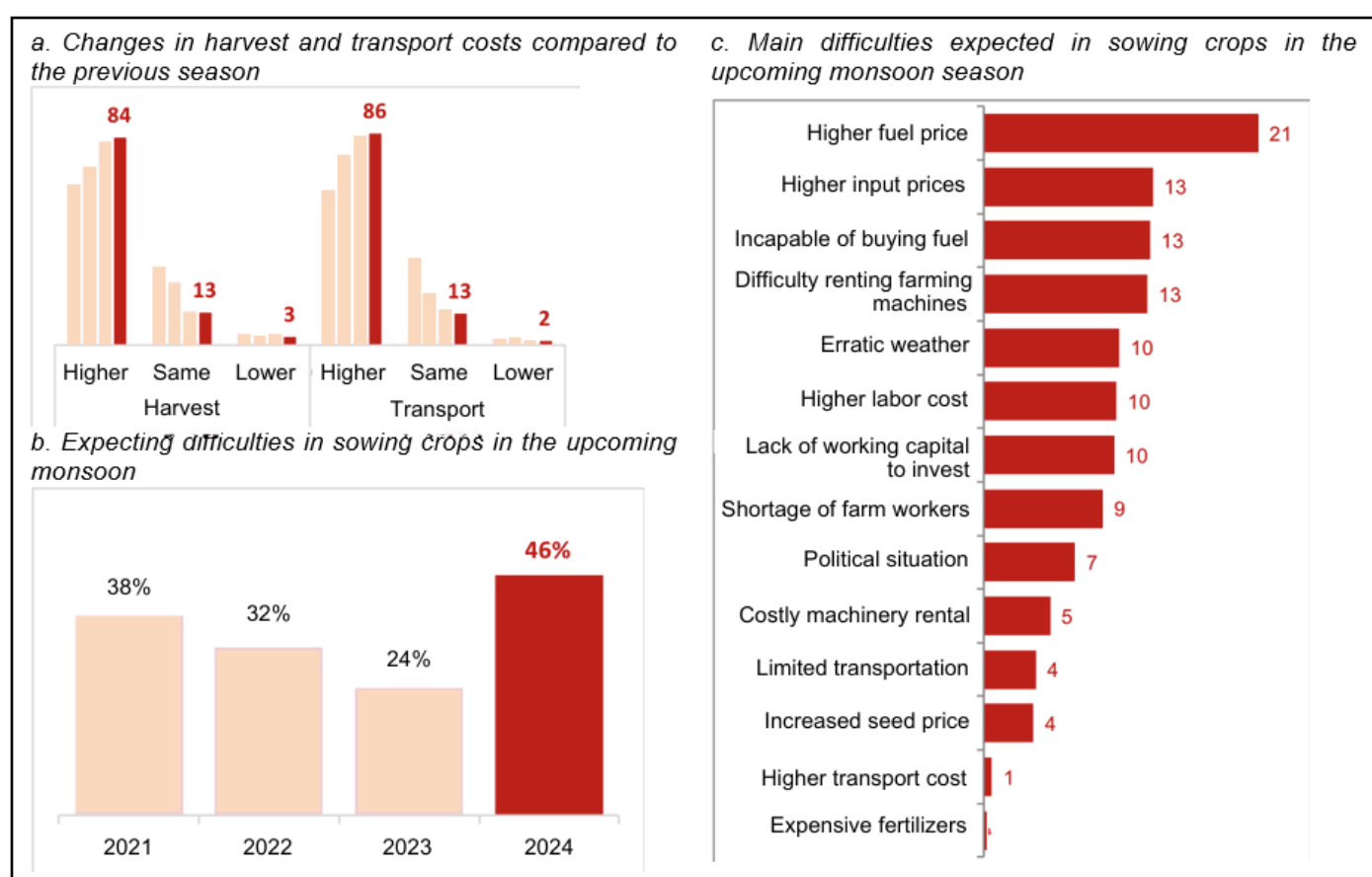


Figure 12: Changes in farming costs and sowing problems in the upcoming monsoon season (percentage of households), 2021–24.

Source: World Bank estimates using WBFS data.

Note: Charts depict results from the previous three rounds in orange-colored columns (R1 from 2021, R2 from 2022, R3 from 2023). The last red-colored column corresponds to data from round 4 (2024).

[15] The percentage of respondents reporting higher costs has risen steadily over the rounds. Higher harvest costs were reported most frequently (90–91 percent) by farmers in Kachin, Bago, Ayeyarwady, Kayah, and Magway regions. Higher transport costs were most frequently reported in Magway (93 percent) and Rakhine (92 percent).

tight rural labor market resulted in wage increases averaging 1,000 kyat per day during the 2023 dry season (IFPRI 2023b). The price of diesel fuel in Myanmar is now 2–3 times higher than in February 2021 (Ministry of Commerce 2023). Kyat depreciation and more expensive fuel have increased transport costs and affected energy access. According to IFPRI, a quarter of farmers lacked access to fuel between January and March 2024 (Minten 2024). The WBFS shows that over the last four years, high fuel prices, high input prices, higher labor costs and a shortage of farm workers are the key operational challenges farmers face. Compared to previous years, more farmers are now worried about these challenges for the upcoming season. Higher fuel prices worry 21 percent of farmers – the highest number since 2020 (figure 12.c).

Market prices of rice and other commodities have continued to rise, encouraging farmers to produce in anticipation of higher earnings.

Despite increased rice production, the market price for rice keeps rising year-on-year.

In March 2024, rice prices remained 46 percent higher year-on-year after steadily increasing between November 2023 and February 2024. IFPRI reports that monsoon paddy prices were 64 percent higher at the farm level than in the past monsoon season (IFPRI 2024b). Below-average outputs in previous years will have depleted rice reserves, contributing to higher prices through scarcity. Higher prices have incentivized farmers to increase production to try to capitalize on market conditions. Soaring prices of agricultural inputs, transport costs, and conflict-related market disruptions have pushed domestic rice prices. In early 2024, rice prices were considered too high for consumers by the MRF, with prices attributed to stockpiling by farmers and traders. The WBFS found that farmers are increasingly holding back their produce. Government intervention has only managed to ease rising rice prices temporarily.

While improved profitability and the price incentive make the 2024 outlook for paddy promising, uncertainties remain. Monsoon paddy improved its profitability again in 2023 for the third year running (IFPRI 2024b). Soaring paddy prices are expected to incentivize farmers to intensify production in 2024 in anticipation of continued profitability, particularly through increased use of chemical fertilizers; in less geographically remote and conflict-afflicted areas, fertilizers have become cheaper and are being used more. However, uncertainties remain from conflict, and labor and fuel availability. The impact of military-service-driven outward migration on labor availability and cost remains unclear. Continued fuel shortages may complicate irrigation and agricultural mechanization, relied upon by

most rice farmers, and raise production costs.

Farm gate prices of other major crops in Myanmar rose compared to the last monsoon season. Sustained demand for pulses (green and black gram) from China and India, and regional demand for beans (mung bean, pigeon pea, and kidney bean) have driven high prices. IFPRI shows that the price of monsoon pigeon peas spiked by 109 percent compared to the last monsoon season. Peanut production surged this past season, attracting buyers from international markets and Thailand. The increased foreign demand reduced the local supply of peanuts and increased domestic market prices. According to IFPRI, farmgate peanut prices were 28 percent higher than in the past monsoon season. Sugar stocks in Myanmar are low, and imports have been limited. With global sugar prices increasing and domestic sugar millers offering high prices to growers, farmgate sugar cane prices were three times higher than in 2019.

Maize prices have, however, remained low, largely because of changing foreign demand and low global prices. The price of maize exports in 2023 was 13 percent lower than in 2022 and 57 percent lower than in 2021. This decrease is partly attributable to a global downturn in maize prices: the crop was 21 percent cheaper in 2023 than in 2022 (World Bank 2024c). Despite reduced maize exports, demand from feedstuff processing factories and foreign demand from China, Thailand, Vietnam, and the Philippines have kept prices from dipping further. However, Thailand's ban on maize imports to countries where slash-and-burn is commonly practiced to clear fields — of which Myanmar is one such country — raises concerns that maize prices may fall further [16].

Transport disruptions are affecting market access and raising costs along the commodity value chain, thereby raising the cost of food.

Conflict-related disruptions and transport delays have increased food prices and reduced farmers' ability to sell perishables. Trade flows and transport in Myanmar continue to be severely disrupted by violence, security threats along key transport routes, border closures,

[16] The use of traditional slash-and-burn practices to prepare agricultural fields for monsoon season planting significantly worsens the air quality in Thai cities, especially this time of the year. On March 19, 2024, this fact contributed to the Thai Cabinet's ban on importing maize from countries where this agricultural practice is widespread (USAID 2024).

highway checkpoints, and travel restrictions (World Bank 2024b). These conflict-related impediments are fueling transportation delays and rising costs. Transport shortages and severely disrupted supply chains have affected the distribution of fresh, short shelf-life and seasonal products to markets. Key transport routes linking regions within Myanmar have been blocked [17], further impacting domestic freight rates and raising commodity prices, specifically for potatoes, chili, and onions. For instance, despite high demand from India, blockages have stalled the onion market. Farmers and traders could not transport produce, so have withheld their stock.

Power outages are forcing agricultural firms to rely more on costly fuel-based energy alternatives, driving up operational costs and food prices. Agricultural firms reported power access as the most frequent disruptor of their operations early in 2023. Since August 2023, blackouts have increased and now last even longer. Food manufacturers could only access electricity four hours a day, down from six hours (The Irrawaddy 2023). Power outages have forced millers to use fuel-based electricity generators (IFPRI 2023a). Yet, the price of diesel fuel in Myanmar is now 2–3 times higher than in February 2021 (Ministry of Commerce 2023), as kyat depreciation has driven energy costs upward.

High fuel prices and operational challenges are further affecting transport and logistics, leading to costlier food (World Bank 2024b). Trucking has over 90 percent share of freight movements over land in Myanmar. It relies on diesel, which is imported and requires transportation over land throughout the country, adding further pressure to already-elevated transportation costs (World Bank 2024b). Trucking is also experiencing challenges with high operating costs, high restrictions on transport authorization, and cumbersome permit requirements, which impact the time and expense of moving goods domestically. Freight rates have risen by 80 percent since February 2021.

[17] Trucking companies operating in conflict-affected regions, such as along the Myawaddy border crossing with Thailand in Kayin state and the Muse crossing with China in northern Shan State, are facing severe delays from conflicts along the corridors leading to the neighboring countries' land borders.

6

TRADE

The food trade balance declined in 2023, driven by lower fresh food exports, especially maize and rice.

In 2023, the international food trade in Myanmar declined, reaching its lowest level in four years. Food exports dropped by 9 percent from 2022 levels (equivalent to US\$393 million), while food imports decreased by 12 percent (equivalent to US\$223 million) (table 5 and figure 13.a). In 2023, Myanmar remained a net food exporter, with a US\$2.5 billion food trade surplus (figure 13.b). However, the surplus declined by 6 percent and 4 percent relative to 2022 and 2021, respectively, indicating a continued decrease in food trade surplus. The reduction in food exports is attributable to a decline in fresh food exports, including maize and rice (table 5 and figure 13.c), constituting about 99 percent of the country's total food exports. Conversely, the reduction in food imports was driven by a decline in processed food (figure 13.d). Historically, processed food accounted for over 40 percent of total food imports; this proportion has decreased since 2021, reaching only 36 percent in 2023.

Table 5: Myanmar's major traded food commodities in 2023 (value in US\$ million)

	2022	2023	Variation	Variation (percentage)
Food exports	4,469	4,076	-393	-9
Of which...				
Rice	787	744	-43	-6
Corn	658	453	-205	-31
Legumes	1,463	1,439	-24	-2
Food imports	1,787	1,564	-223	-12
Of which...				
Palm oil	683	627	-56	-8
Wheat	102	151	49	49

Source: World Bank staff calculation using data from UN Comtrade.

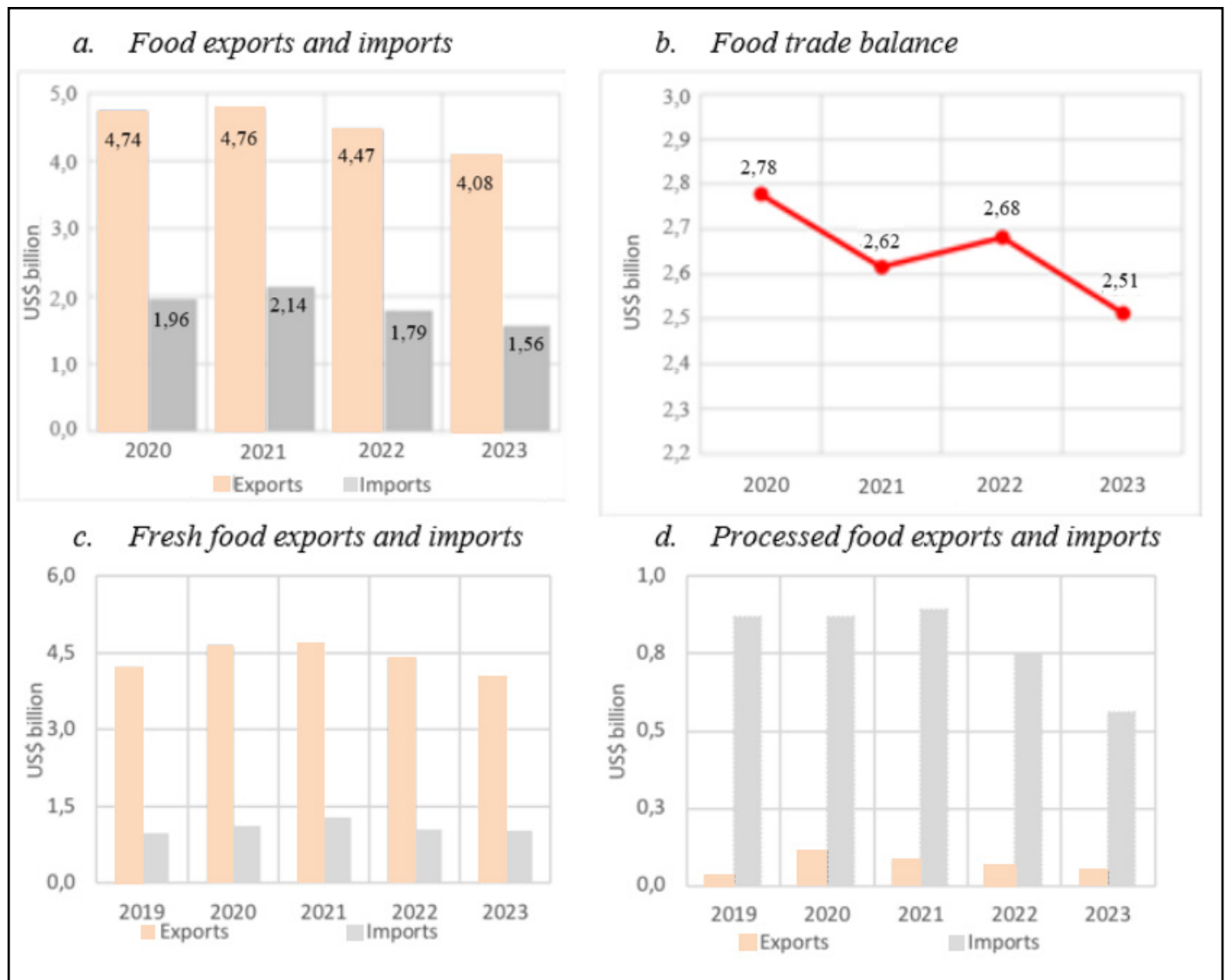


Figure 13: Recent food trade trends in Myanmar

Source: World Bank staff calculation using data from UN Comtrade.

Note: Value in US\$ million. Data reflects the 3-month moving average.

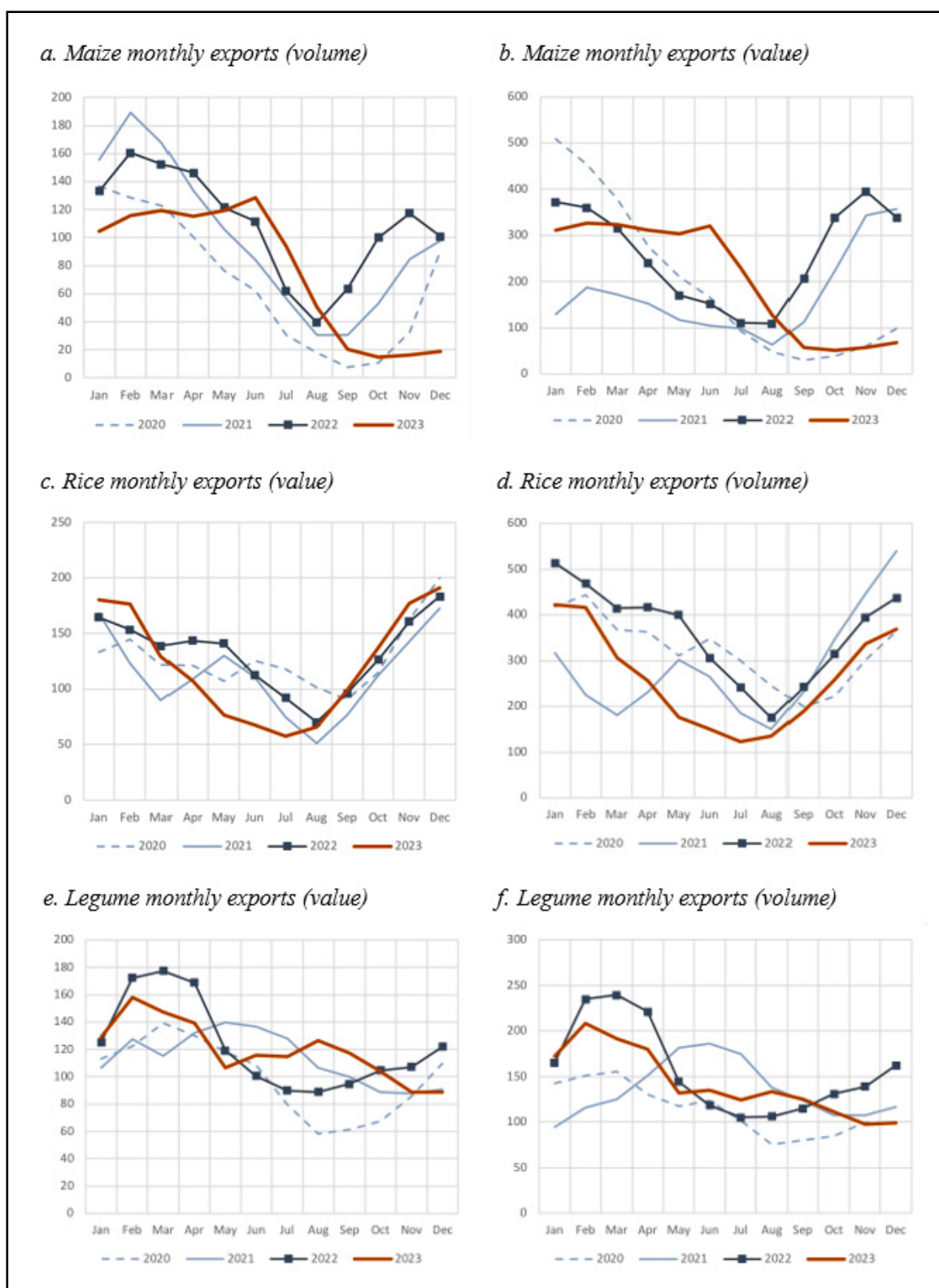


Figure 14: Crop exports (value and volume) in Myanmar, 2020–23

Source: World Bank staff calculation using data from UN Comtrade.

Note: Value in US\$ million. Volume in thousand tons. Data reflects the 3-month moving average.

In the first half of 2024, rice export volumes were the lowest since 2020, possibly due to the negative effect of policy on export earnings. Although the value of rice exports surpassed previous records in the last quarter of 2023 (table 5 and figures 14.c and 14.d), the volume remained at its lowest value since 2020, likely due to factors including higher global rice prices and kyat depreciation. This finding suggests that Myanmar did not fully capitalize on higher global rice prices, which increased by about 27 percent in 2023 compared to 2022. Overall, rice exports experienced a 6 percent decline in 2023, amounting to a loss of US\$43 million. The decline in volume in 2023 was even more significant (26 percent), equating to approximately 1.1 million metric tons less than in 2022. Possible factors contributing to the decline in rice exports include changes in trade policies, such as the requirement to surrender foreign exchange earnings (IFPRI 2023c).

Maize was the primary contributor to the overall decline in food exports. Compared to 2022, maize exports plummeted by 31 percent in 2023, representing a loss of US\$205 million (table 5 and figures 14.a and 14.b). This decrease can be partly attributed to a global downturn in maize prices, which were 21 percent lower in 2023 than in 2022 (World Bank 2024c). Accordingly, export and domestic maize prices also plummeted, especially from the second quarter of 2023 (GNLM 2023a; MDN 2023). Due to the global price downturn, the unit price for maize export was 57 percent lower in 2023 compared to 2021.

The decline in legume exports was modest due to high demand from India. Due to the existing agreement with India (GNLM 2023b) and competitive legume prices, the value of legume exports decreased by just 2 percent, amounting to US\$24 million (table 5 and figures 14.e and 14.f). While this was a relatively modest decrease compared to rice and maize, in terms of volume, legume exports declined by 8 percent in 2023 compared to 2022. This indicates legume production issues, likely due to supply chain constraints. The decline in legume exports was also caused by reduced demand from China for black gram [18]. China is the second major market for legumes from Myanmar, accounting for about one-third of the country's total legume exports. In 2023, total legume exports to China declined by 23 percent, and black gram export volume to China fell by 17 percent compared to 2022.

[18] Black gram is the primary legume export, accounting for about 79 percent of the total legumes exported from Myanmar over the past five years. Myanmar primarily exports black gram to India, followed by China, Singapore, Pakistan and Vietnam.

Imports of key commodities have largely increased, although frequent changes in import and foreign currency policy and kyat depreciation presented challenges for importers.

Imports of wheat — the country’s third most imported food item — increased in value and volume. In 2023, wheat imports increased by 49 percent and 64 percent in terms of value and volume, respectively, compared to 2022 (table 5 and figures 15.e and 15.f). Increases in global wheat prices boosted the wheat import value. While wheat is not grown as a primary grain in Myanmar, it plays a significant part in the country’s food intake, as wheat-based foods, such as noodles, are widely consumed. Wheat importers must obtain import licenses, which are subject to delays and frequent changes in import/export policies. Importers reported that it takes approximately 4–6 months to get their license (USDA 2024).

Palm oil imports increased by 20 percent, although import value decreased due to the global palm oil price downturn. Palm oil is a staple food item in Myanmar, and the country relies on imports for two-thirds of its palm oil consumption (RFA 2023). With the global palm oil price downturn, the unit price for palm oil imports declined by 26 percent in 2023 compared to 2022. The price downturn lowered Myanmar palm oil imports in value terms by 8 percent compared to 2022 (table 5 and figures 15.a and 15.b). In terms of volume, imports increased 20 percent, but despite this increase in palm oil import volume, a shortage of palm oil in the domestic markets was also reported as demand outstripped supply. In 2023, the price of palm oil was almost five times as high as in 2020, prompting the authorities to set a fixed price (RFA 2023).

The import of processed food has been declining since 2020 (table 5 and figures 15.c and 15.d). Imports of food preparations — the second major category of food imports — decreased by 23 percent in 2023 compared to 2022, reaching their lowest point since 2020. Importers have faced challenges in obtaining foreign exchange for importing food preparations as these items are considered imports under the third-priority sector; as such, they lack preferential import treatment [19]. Moreover, reduced demand — due to increased prices — is also likely to have reduced imports of food preparations.

[19] The Ministry of Commerce (MOC) set up three priority sectors for imports to facilitate import license and access to foreign exchanges. The items in the first priority sector are granted preferential access to the official foreign exchange rate (2,100 kyat per US dollar) and import licenses compared to products in other groups.

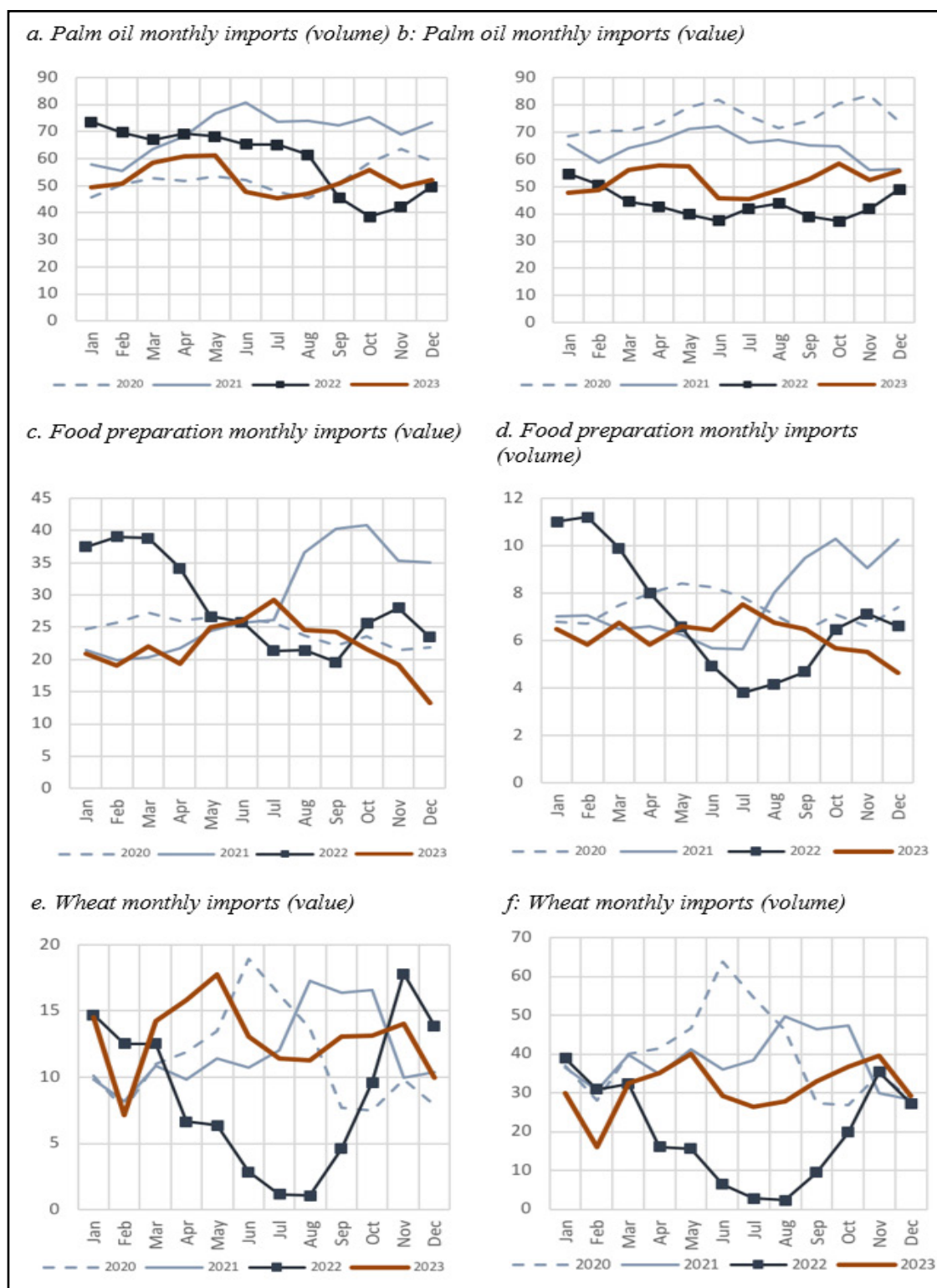


Figure 15: Crop imports (value and volume) between 2020 and 2023 in Myanmar

Source: World Bank staff calculation using data from UN Comtrade

Note: Value in US\$ million. Volume in million kilograms. Data reflects the 3-month moving average. Food preparation includes items under Harmonized System (HS) 2106.

Kyat depreciation and forex policies have strongly impacted the availability and price of imported food products. Kyat depreciation (figure 16) is increasing the cost of imported foods, reducing the capacity to import items, lowering availability, and driving up local prices. The reduced availability of basic imported food items in local markets and below-average imports from 2022 are linked to the kyat depreciation. For instance, the unit price for palm oil imports declined, yet the price downturn did not benefit Myanmar consumers. Domestic palm oil prices remained high in 2023 due to kyat depreciation.

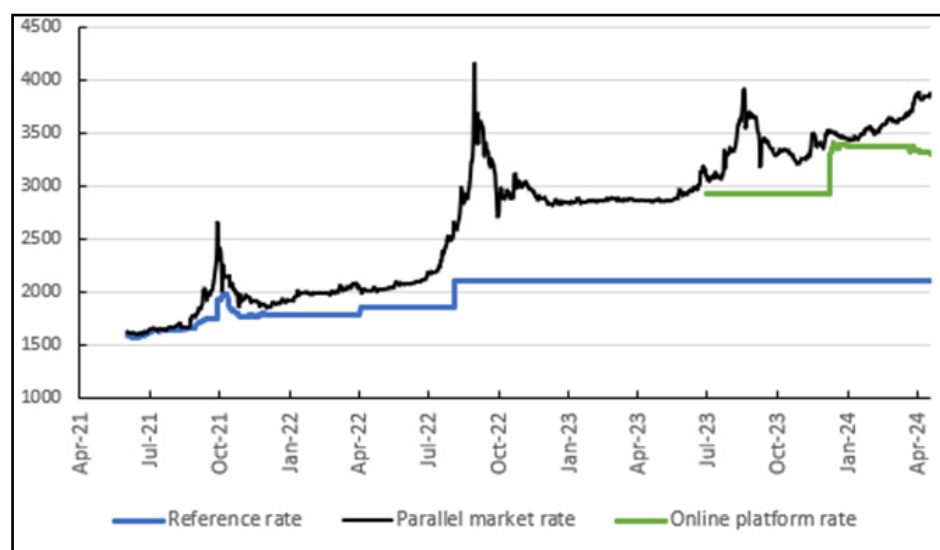


Figure 16: Exchange rates (kyat per US\$)

Source: World Bank estimates.

The 2024 food trade outlook for Myanmar is uncertain due to kyat depreciation and an uncertain regulatory environment; however, rice exports are expected to continue increasing.

Export performance in 2024 is expected to improve with increased rice exports. The latest data from the Ministry of Commerce shows overall agricultural exports surged by 14 percent (equivalent to US\$216 million) in the first quarter of 2024 compared to the same period last year. This uptick is primarily attributed to increased production. According to the FAO, Myanmar's rice production could rise by 3.9 percent compared to 2022 (FAO 2024c). This projected increase is anticipated to boost rice exports, which could see an uptick in 2024, contingent on the global rice price, which was holding an upward trend as of early 2024.

Prospects for maize exports are uncertain due to the decline in global prices and the ban on imports from Thailand. Myanmar's maize production is expected to increase in 2023, resulting in higher carry-over stocks available for exports. However, the global corn price is trending downwards (World Bank 2024c), translating to lower prices for maize and making exported maize less competitive. Therefore, a significant increase in maize exports in 2024 is unlikely, particularly given Thailand's ban on maize imports from countries that use open burning to clear fields. The increased production combined with export restrictions can lead to surplus accumulation within the domestic market, resulting in depressed prices. Maize farmers may face financial stress due to reduced income from lower domestic prices and the inability to export surplus produce, impacting their ability to invest in future planting seasons. In the last four years, Thailand was responsible for two-thirds of Myanmar's maize export value, meaning the negative impact of the ban could be significant for maize producers in Myanmar (USAID 2024). In April 2024, the conflict in Myawaddy (Kayin State) disrupted the flow of maize exports, which had been granted tariff-free status from Thailand between February and August.

Trade uncertainties are expected to persist in 2024 with continued kyat depreciation. Kyat depreciation has continued to impose supply-side constraints on farmers since 2021. Increased agricultural input costs will likely dampen a relatively positive production outlook. The market rate for the kyat fell to 3,800 kyat against the U.S. dollar in early April. However, the Central Bank of Myanmar (CBM) online trading platform rate has remained fairly fixed since mid-December 2023, at 3,375 kyat per U.S. dollar. This rate has resulted in an ever-widening divergence between the exchange rate available from authorized banks and the market rate from money changers. A weaker kyat will continue to put pressure on prices for traded goods and contribute to higher inflation.

Foreign exchange and trade policy uncertainty are expected to continue to affect food trade. Frequent policy changes further complicate Myanmar's food trade. The evolution of the CBM's foreign currency conversion policy for export earnings has been erratic since 2021, using a range of often-changing administrative controls, adding considerable uncertainty to business operations (World Bank 2024b). Early in 2024, the CBM eased the use of earnings to import fuel or, alternatively, converted earnings to kyat at the official rate. However, later in February, the central bank retightened its policy, reducing profits and incentives to traders (USAID 2024). Around the same time, the MRF also announced that it would prioritize the export of broken and parboiled rice to ensure a larger domestic supply of white rice (USAID 2024).

7

OUTLOOK

Agricultural production and productivity in Myanmar have been resilient and may continue that path, although uncertainties remain. The resilience demonstrated by farmers in previous seasons, alongside improvements in input availability and increased fertilizer use, suggests a potential for stable or slightly improved production levels. The anticipated increase in rice productivity, bolstered by favorable weather conditions and improved farming techniques, is a positive sign. Yet, farmers may continue to face challenges with deteriorating access to and rising costs of some inputs (seeds, machinery, labor, and fuel), which can put pressure on production. Without further assistance, farmers in conflict-affected and geographically isolated areas are likely to continue to face substantial hurdles, including access to inputs and extension services.

The price of essential food commodities will likely remain high. Almost all food commodity prices have ticked up since 2023, continuing a year-on-year rise. These sustained high prices will continue to challenge food accessibility and affordability in Myanmar. Given that production and productivity have shown positive signs of stability or growth, food prices and accessibility may remain the main concern for food security and nutrition in Myanmar. Conflict and security-related border closures, travel restrictions, and high transport costs will likely lead to even costlier food in conflict-affected areas.

Shocks from high food prices and conflict intensification can spell further deterioration of food security and nutrition, especially for women and children. Results from this report show that the nutritional status of households in Myanmar may be under stress due to food access restrictions imposed by rising food prices and conflict-related constraints. This finding raises concerns, particularly for women and children in conflict-affected areas who will bear the brunt of shocks and will require dedicated support for child development and childcare. Efforts to enhance support through expanded safety nets and increased access to diverse and nutritious foods will be critical in mitigating these challenges and ensuring a more secure agricultural environment for the upcoming season.

The trade outcome in 2024 is uncertain and will depend strongly on foreign demand, kyat depreciation, and trade policy stability. The positive trends in production and productivity for rice support an upward trend in exports. However, despite increased production, maize is unlikely to see such an export increase due to low global prices and weak international demand. A weaker kyat will continue to put the price of traded goods under pressure, and the current uncertain policy environment on trade and foreign exchange will affect international trade negatively.

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Methodological Notes

Farmers' Survey

The World Bank commissioned Myanmar Survey Research (MSR) to conduct a comprehensive study on the livelihood situation of farmers across Myanmar. The Myanmar Food Security and Markets survey – also referred to as the World Bank Farmer Survey (WBFS) — aims to comprehensively assess the current food security landscape within Myanmar's agricultural sector, particularly considering the impact of the military coup on farming households. Originally initiated in response to the COVID-19 pandemic, the survey's focus has now understandably shifted to address the ongoing challenges posed by the coup on rural livelihoods and income.

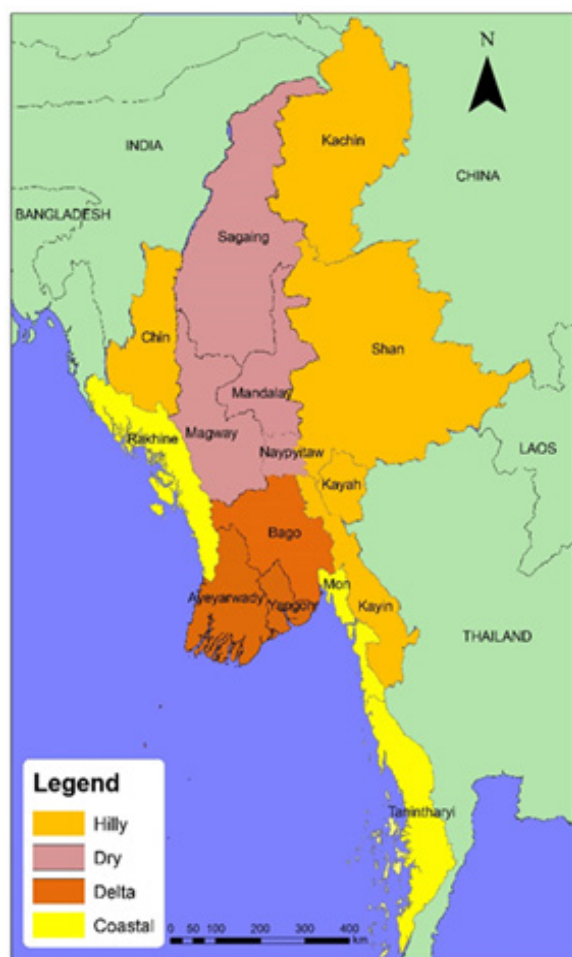
The research sought the views of farm households from various regions proportional to each area's rural population, with data rounds in December 2021, May 2022, May 2023, and March 2024. Initially, 850 respondents were involved, but since round 3, the survey has encompassed 1,200 participants. To ensure the target sample for round 4 was achieved, 501 additional households were included, with 699 households and respondents who participated in either round 1, 2, or 3, or all, ensuring continuity in the analysis across rounds

The data collection phase was conducted in March 2024, employing a computer-assisted telephone interviewing (CATI) platform. Subsequently, collected data were transferred to SPSS (Statistical Package for the Social Sciences) and Q-Professional software for processing and analysis.

The data collection for this study builds on a survey comprised mainly of closed-ended questions. Key areas of investigation encompass food insecurity and agricultural income, agriculture production and input supply, agriculture credit and rural finance, shocks and coping mechanisms, and conflict sensitivity and impacts.

The results of the survey categorize the respondents into four distinct agroecological zones. These zones are based on similarities in climate, landform, soils, and land cover, encompassing not only agricultural land but also other significant features such as forests, wetlands, and grazing areas. The four agroecological zones each represent the diverse agricultural landscapes across Myanmar (figure A.1):

- The Dry Zone, comprises Sagaing, Magway, Mandalay and Nay Pyi Taw, and is characterized by flat terrain and semi-dry weather conditions.
- The Coastal Zone spans Rakhine, Mon States, and the Tanintharyi Region, covering Myanmar's extensive coastline of approximately 3,000 kilometers.
- The Delta Zone, also known as the Irrawaddy or Ayeyarwady Delta, encompasses Bago, Yangon, and Ayeyarwady regions.
- The Hilly Zone encompasses Kachin, Kayah, Kayin, Chin, and Shan States, renowned for its mountainous terrain and abundant forest cover.



The survey was conducted via phone, which introduces a potential bias by including only households with mobile phones. As mobile phone penetration in Myanmar is below 90 percent, the survey could have excluded vulnerable households without phones or network coverage in remote areas. Thus, the CATI survey may not fully represent the population. However, by maintaining a uniform survey design and methodology, this study offers valuable insights into the evolving food security and livelihood conditions of Myanmar's farming households.

Figure A.1: Agroecological zones in Myanmar

Household Dietary Diversity Scores

A by-product of the MRS study is the Household Dietary Diversity Score (HDDS), a quantitative measure used to evaluate the variety of food consumed by households, which is commonly employed in nutrition and food security assessments. The HDDS assesses the availability and accessibility of food within households over 24 hours, determined by the number of food groups consumed during the assessment window. Typically, the score is derived from a standardized list of food groups, encompassing categories such as grains, roots and tubers, vegetables, fruits, meats, dairy products, legumes, eggs, nuts and seeds, and oils and fats.

Comprising a set of 12 food groups, the HDDS serves as the cornerstone for the calculation, with a higher score indicating a wider array of food groups consumed, which is correlated with enhanced dietary quality and nutritional outcomes. Acting as a proxy measure for dietary diversity, the HDDS evaluates the adequacy and quality of household diets.

Tracking changes in the HDDS over time offers insights into shifts in dietary patterns, food access, and overall food security. Such insights make the HDDS a valuable tool for policymakers, researchers, and organizations operating in nutrition, agriculture, and food security. The metric is instrumental in assessing and addressing the nutritional requirements of populations, particularly those residing in rural areas. It aids in designing targeted interventions and policies to enhance dietary diversity and overall food security in rural communities.

In the MRS study, the HDDS was computed using 12 of the 15 food groups included in the questionnaire. Each food group was assigned a score of 1 if consumed and 0 if not, resulting in a household score ranging from 0 to 12. To ascertain the average HDDS for the study population, the sum of the HDDS was divided by the total number of households surveyed.

A higher HDDS generally signifies better nutritional status and health outcomes, indicating a broader range of consumed nutrients. Conversely, a low HDDS may indicate a limited variety of food groups and potential nutrient deficiencies in the diet.

Table A.1: Food items comprised in the calculation of the HDDS

Food items	
1 Grains	9 Fish
2 Potatoes	10 Dairy
3 Pulses and nuts	11 Eggs
4 Vegetables	12 Fried foods
5 Fruit	13 Sweets and sugary
6 Meat and poultry	14 Drinks

Desk Review and Analysis of Secondary Data

The research employed secondary data from two main sources: a desk survey that collated agricultural news from various outlets and a review of governmental data on agricultural production and area. The desk survey included news concerning the agricultural sector reported from journals, newsletters, government agencies, ministries, private sector professional associations, agribusinesses, finance institutions, and governmental bodies. It also covered related public policies and regulations.

The team examined the secondary data regarding agriculture and food security to assess food security status, unemployment, and production in crops, livestock, and fishery sectors. The analysis utilized official datasets, reports from Myanmar institutes, and resources from international organizations like the FAO, IFPRI, UNHCR, OCHA, USDA, WFP, and the World Bank.

Other units from the World Bank also contribute to the monitoring efforts of the team. This current report has benefited from contributions on the rising food insecurity in conflict-affected areas and on the role of NTFPs. In February and March 2024, the World Bank conducted an in-depth qualitative study of 17 villages in 16 townships in conflict-affected areas of Myanmar. Surveyed villages were located in Rakhine, Tanintharyi, Chin, Kachin, Kayin, Ayeyarwady, Magway, and Sagaing. The role of NTFPs was assessed in March 2024, and involved 30 groups of key informants. These including experts and households in forest-dependent communities and community forestry user groups from regions including Shan, Rakhine, Tanintharyi, Yangon, Kachin, and Ayeyarwady.

Trade Flows

The study on trade flows builds on the data from the UN Comtrade database. The temporal analysis runs nationwide from January 2020 to April 2024, with data presented as 3-month moving averages for both value and volume data. The analysis covers only agricultural food items and excludes nonfood items. The transformation aimed to aggregate the original Comtrade data into relevant subsets of food items: fresh and processed food and other subsets of food items, e.g., grains, legumes, and food preparations.

The fresh food category comprises data from HS codes 1 (animals, live), 2 (meat and edible meat offal), 3 (fish and crustaceans, mollusks, and other aquatic invertebrates), 7 (vegetables and certain roots and tubers, edible), 8 (fruit and nuts, edible; peel of citrus fruit or melons), 9 (coffee, tea, mate and spices), 10 (cereals), 11 (products of the milling industry; malt, starches, inulin, wheat gluten), a subset of items from HS 12 (oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruit; industrial or medicinal plants; straw and fodder), 15 (animal or vegetable fats and oils and their cleavage products; prepared edible fats; animal or vegetable waxes) and 17 (sugars and sugar confectionery).

Additionally, food items are further disaggregated into various categories, including food preparations, which include data under HS code 16 (meat, fish or crustaceans, mollusks or other aquatic invertebrates; preparations thereof), 18 (cocoa and cocoa preparations), 19 (preparations of cereals, flour, starch or milk; pastrycooks' products) and 20 (preparations of vegetables, fruit, nuts, or other parts of plants).

Price Analysis

The study on food prices analyzed the levels and fluctuations of retail prices for selected food commodities nationwide from January 2020 to April 2024. Data is sourced from the WFP retail monthly price records from the OCHA-maintained Humanitarian Data Exchange website. The data from the WFP dataset were averaged to chart the monthly prices per year and for those selected commodities with available up-to-date values.

In this report, the percentage variations are not WB-calculated but sourced from the WFP Price Monitoring Dashboard, including a 6-month projection of prices, as available from the WFP DataViz VAM [20].

Rice Self-Sufficiency

As a rice-producing country, Myanmar has proven capable of meeting the aggregate domestic needs. However, the outlook per state and region is less positive, with some areas having a surplus and others a deficit, with the gap widening. The analysis on rice self-sufficiency aims to delve further into this gap between surplus and deficit areas.

The analysis relies on official data from the MOALI about paddy area and paddy production disaggregated per state and region, and the numbers around IDPs as provided by the UNHCR. Unfortunately, the MOALI data is only available with a one-year lag. However, this limitation means that the most recent and up-to-date figures on surplus and deficit areas are unavailable and only show the status of this indicator at the beginning of the analyzed timeframe. Furthermore, rather than the one-off picture, the multiple snapshots of this indicator prove more relevant for analyzing food insecurity per state and region.

[20] For further information on the Humanitarian Data Exchange website and the WFP Price Monitoring Dashboard, see <https://data.humdata.org/dataset/wfp-food-prices-for-myanmar> and <https://dataviz.vam.wfp.org/economic/export-data/prices> respectively.

Supplementary Figures and Tables

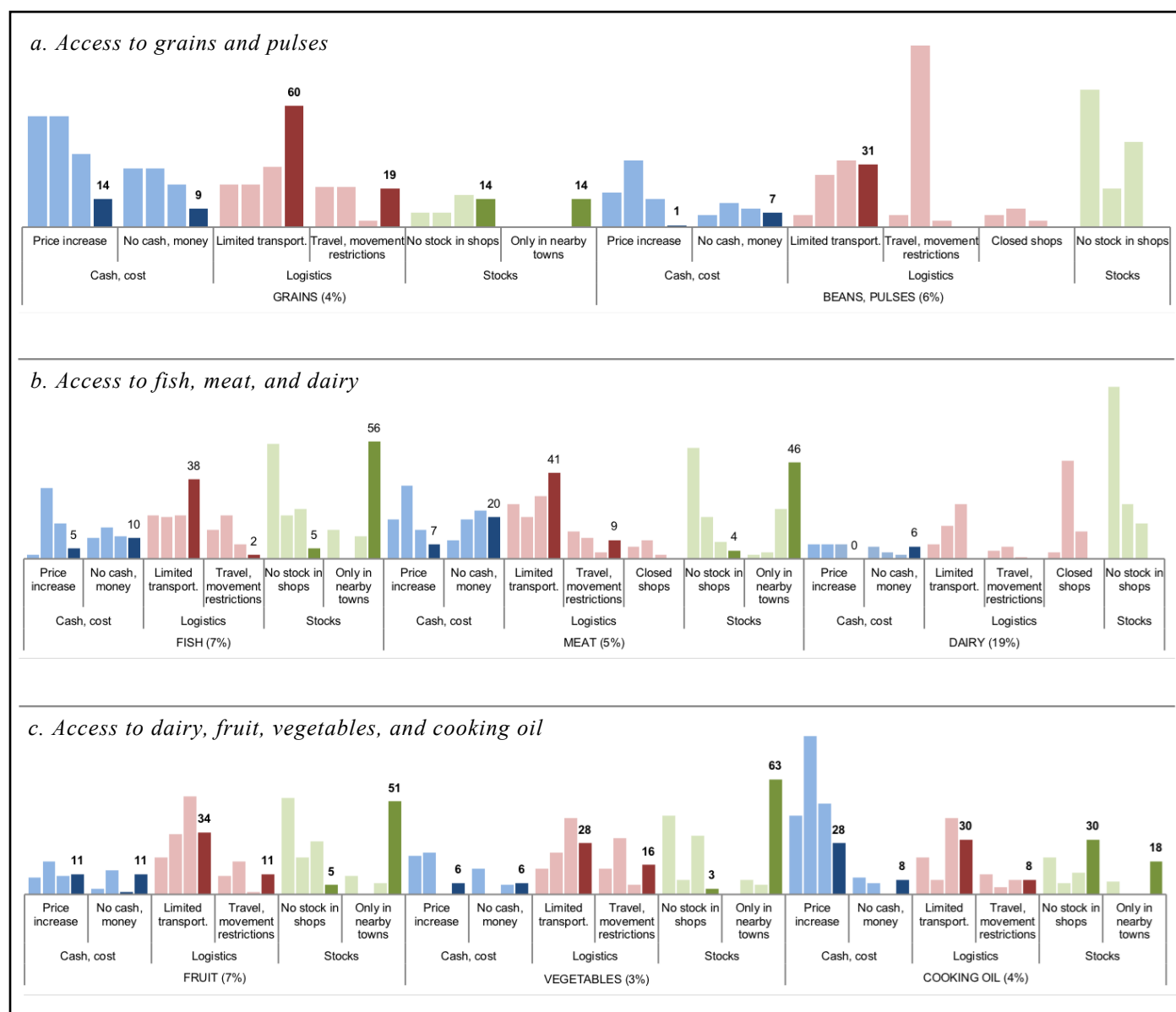


Figure A.2: Farm households' reported issues in accessing food items (percentage)

Source: World Bank estimates using WBFS data.

Table A.2: Annual targets and variation of paddy area to be planted and progress in harvested paddy area

	2020	2021	2022	2023	2024
Planted area (target)	7,220,000	7,170,000	7,040,000	7,130,000	1,050,000
- Dry season	1,100,000	1,080,000	970,000	1,060,000	1,050,000
- Monsoon season	6,120,000	6,090,000	6,070,000	6,070,000	0
Variation in target of paddy area to be planted (percentage over previous year target)	1.0%	-0.7%	-1.8%	1.3%	-
- Dry season	6.6%	-1.8%	-10.2%	9.3%	-0.9%
- Monsoon season	-1.8%	-0.5%	-0.3%	0.0%	
Progress in harvested area (percentage in planted area of current year)					
- Dry season (April)	45.1%	44.7%	39.9%	40.4%	38.5%
- Monsoon season (Dec)	53.3%	56.0%	60.5%	60.1%	

Source: World Bank staff estimates based on data from various AFSI Rice Growing Outlook reports (2020–24)

Note: Target figures as reported in April (for dry season) and December (for monsoon season).

Table A.3: Production, area and yields in selected crops in Myanmar (2018–24)

	Paddy (rough product)	Rice (milled)	Corn	Soybean	Peanut
Production (1,000 ha)					
Average 2018–23	19,578	12,530	2,640	139	1,554
2022–23	18,438	11,800	2,650	130	1,650
2023–24	18,672	11,950	2,850	125	1,554
Percentage change 1 year	1.3%		7.5%	-3.8%	-5.8%
Percentage vs. average	-4.6%		8.0%	-9.9%	0.0%
Area (1,000 ha)					
Average 2018–23	6,936	--	626	134	1,020
2022–23	6,800	--	650	125	1,065
2023–24	6,860	--	660	120	1,070
Percentage change 1 year	0.9%	--	1.5%	-4.0%	0.5%
Percentage vs. average	-1.1%	--	5.4%	-10.3%	4.9%
Yield (tons per ha)					
Average 2018–23	--	1.806	4.215	1.037	1.524
2022–23	--	1.735	4.077	1.040	1.549
2023–24	--	1.742	4.318	1.042	1.452
Percentage change 1 year	--	0.4%	5.9%	0.2%	-6.3%
Percentage vs. average	--	-3.6%	2.4%	0.4%	-4.7%

Source: USDA estimates. Ha; hectares

Table A.4: Non-adjusted and adjusted rice sufficiency per state and region

	World Bank estimates							CSO estimates	
	Non-adjusted rice sufficiency		IDPs (April 2023)			IDP-adjusted rice sufficiency		Net balance	Status
	Net balance	Status	Outgoing flows	Incoming flows	Net flows	Net balance	Status		
Ayeyarwady	3,025	Surplus	0	0	0	3,025	Surplus	3,841	Surplus
Bago	1,617	Surplus	83,900	0	-83,900	1,629	Surplus	2,031	Surplus
Chin	-56	Deficit	48,700	5,500	-43,200	-50	Deficit	-81	Deficit
Kachin	45	Surplus	15,300	89,600	74,300	35	Surplus	26	Surplus
Kayah	-3	Deficit	95,100	0	-95,100	11	Surplus	-9	Deficit
Kayin	124	Surplus	115,800	1,900	-113,900	140	Surplus	138	Surplus
Magway	-116	Deficit	196,700	0	-196,700	-88	Deficit	-182	Deficit
Mandalay	-465	Deficit	0	0	0	-465	Deficit	-700	Deficit
Mon	166	Surplus	27,800	0	-27,800	170	Surplus	192	Surplus
Naypyitaw	-27	Deficit	0	0	0	-27	Deficit	-56	Deficit
Rakhine	96	Surplus	10,300	222,200	211,900	66	Surplus	78	Surplus
Sagaing	722	Surplus	752,500	0	-752,500	828	Surplus	856	Surplus
Shan	-19	Deficit	74,800	8,800	-66,000	-9	Deficit	-129	Deficit
Tanintharyi	-59	Deficit	56,600	0	-56,600	-51	Deficit	-98	Deficit
Yangon	-343	Deficit	0	0	0	-343	Deficit	-596	Deficit
Total	4,708	Surplus	1,477,500	328,000	-1,149,500	4,869	Surplus	5,311	Surplus
Surplus areas			1,100,700	313,700	-787,000	5,903		7,153	
Deficit areas			376,800	14,300	-362,500	-1,034		-1,842	

Source: World Bank estimates based on CSO and UNHCR data.

Note: Net balance, in million tons of rice.

Table A.5: Non-adjusted and adjusted rice sufficiency per state and region

	2021	2022	2023	2024
Hilly	9.66	10.04	7.66	6.94
Kayin	10.04	9.85	8.06	7.58
Shan	9.73	10.17	8.11	7.42
Kayah	8.67	9.5	6.88	6.84
Kachin	9.96	10.44	8.06	6.7
Chin	7.44	8.13	6.56	5.5
Dry	9.5	9.92	8.18	7.58
Nay Pyi Taw	10.58	10.33	8.58	8.62
Mandalay	9.35	10.09	8.51	7.89
Sagaing	9.69	9.68	8.08	7.47
Magway	9.16	9.92	7.72	6.83
Delta	9.87	10.15	8.24	7.65
Ayeyarwady	8.89	10.03	8.22	7.74
Bago	9.65	10.53	8.49	7.64
Yangon	10.19	9.77	7.86	7.45
Coastal	9.41	9.74	8.11	7.45
Mon	9.94	10.03	8.18	8.2
Tanintharyi	9.69	8.88	8.76	7.7
Rakhine	8.78	9.42	7.4	6.46
Total	9.64	9.99	8.05	7.41



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