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Report Highlights:

FAS Rangoon forecasts Burma's rice and corn production to increase in MY 2025/26 due to improvement in average yield, driven by favorable weather and flood recovery compared to MY 2024/25. Burma's wheat imports for MY 2025/26 are expected to remain below pre-COVID and pre-coup levels due to challenges in obtaining import licenses. However, exporters and importers face ongoing uncertainty due to the regime's foreign currency controls, delays in import licensing, and the continued conflict between the regime and ethnic armed forces.

Disclaimer

The FAS Office of Agricultural Affairs in Rangoon, Burma, prepared this report for U.S. exporters of food and agricultural products. Following the February 1, 2021, military coup in Burma (also known as Myanmar), FAS has limited its official interaction with Burmese military regime officials. Additionally, as a result of ongoing countrywide conflicts, Post has been unable to conduct crop surveys in some major crop-growing areas. Burma's Ministry of Agriculture, Livestock and Irrigation (MOALI), and Ministry of Commerce do not publish official production data and has been less cooperative in sharing data updates since the coup. Since 2022, FAS has not been able to access official trade statistics maintained by the Ministry of Commerce. There have been no country-wide consumption surveys in Burma since 2016¹. Post forecasts consumption based on interviews and other qualitative information. To gather the most up-to-date information despite these challenges, FAS Rangoon interviewed key stakeholders along the supply chain in Burma and carried out crop surveys (partially restricted by security considerations due to active fighting in some key production areas). Post has adjusted the Burmese phonetic English spelling for "Emata" rice to "Aemahta" from now on. Please contact FAS Rangoon at agrangoon@usda.gov in case of further questions about the contents of this report. Throughout the report, Post used the following market exchange rate: \$1= 4,500 Myanmar kyat² (MMK).

¹ Theingi Myint, 2016: Study on Per Capita Rice Consumption and Ratio of Household Expenditure in Myanmar.

² MMK: Burma Currency

Executive Summary

FAS Rangoon (Post) forecasts Burma's milled rice production for marketing year (MY) 2025/26 to be 12.5 million metric tons (MMT), due to recovery of the flood affected areas, favorable weather, and strong export demand. Post revised MY 2024/25 production down due to severe flooding, Typhoon Yagi, and ongoing country wide conflicts, which led to poor yields and lower rice quality. Despite challenges, rice prices remained strong, motivating farmers. Political turmoil, migration, and reduced tourism have led to declining domestic consumption. Rice exports for MY 2025/26 are forecasted at 2.2 MMT.

Post forecasts MY 2025/26 corn production to increase to 2.95 MMT due to good yields, driven by anticipation of favorable weather and strong domestic prices. Burma's corn consumption forecast for MY 2025/26 remains unchanged due to a weak livestock industry, high feed costs, and lower demand for poultry products. Burma's corn exports for MY 2025/26 are expected to reach 2.3 MMT, impacted by reduced production, transportation issues, border closures, and low prices. Thailand remains the largest market for Burmese corn through the duty-free window, while India has emerged as a potential market due to its zero-tariff policy.

Post forecasts Burma's wheat production for MY 2025/26 at 70,000 MT, mainly impacted by conflicts in key wheat-growing regions, like Sagaing and Shan State, and by low profitability. Post forecasts wheat consumption in MY 2025/26 at 450,000 MT, below pre-coup demand due to low purchasing power, transportation challenges, and reduced mill operations. Post forecasts wheat imports at 375,000 MT in MY 2025/26, below pre-COVID and pre-coup levels. The decline is attributed to import licensing challenges, policy changes, and reduced local demand. Burma imports wheat from countries like Australia, Turkey, and the United States, with informal imports partially filling the gap.

1. Rice

Table 1.1: Burma’s Rice Production, Supply, and Distribution

Rice, Milled Market Year Begins Burma (Myanmar)	2023/2024		2024/2025		2025/2026	
	Jan 2024		Jan 2025		Jan 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	6800	6800	6800	6860	0	6950
Beginning Stocks (1000 MT)	1109	1109	414	544	0	349
Milled Production (1000 MT)	11900	12300	11850	11900	0	12500
Rough Production (1000 MT)	18594	19219	18516	18594	0	19531
Milling Rate (.9999) (1000 MT)	6400	6400	6400	6400	0	6400
MY Imports (1000 MT)	2	2	5	5	0	5
TY Imports (1000 MT)	2	2	5	5	0	5
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	13011	13411	12269	12449	0	12854
MY Exports (1000 MT)	2797	2767	1500	2000	0	2200
TY Exports (1000 MT)	2797	2767	1500	2000	0	2200
Consumption and Residual (1000 MT)	9800	10100	10000	10100	0	10000
Ending Stocks (1000 MT)	414	544	769	349	0	654
Total Distribution (1000 MT)	13011	13411	12269	12449	0	12854
Yield (Rough) (MT/HA)	2.7344	2.8263	2.7229	2.7105	0	2.8102
(1000 HA), (1000 MT), (MT/HA)						
MY = Marketing Year, begins with the month listed at the top of each column						
TY = Trade Year, which for Rice, Milled begins in January for all countries. TY 2025/2026 = January 2026 - December 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: Post calculations based on interviews with the farmers, traders, millers, Myanmar Rice Federation.

1.1 Production

Post forecasts a recovery in Burma's rice production to 12.5 million metric tons (MMT) for MY 2025/26. This recovery is driven by attractive domestic prices, an expected increase in flood-recovered areas, favorable weather conditions, and strong export demand. However, the production forecast for MY 2024/25 has been revised downward due to several challenges. In MY 2024/25, the main rice crop planting areas showed recovery, particularly in regions with fewer conflicts, thanks to high domestic rice prices. Despite this, several factors, including severe flooding from July to September, Typhoon Yagi, and unusual rainfall during the harvest season, combined with ongoing conflicts, particularly in Rakhine, Kayin, and Kayah States, have severely impacted production. These conditions resulted in lower yields per unit area and poor rice quality.

The flooding that began in July and continued through September affected more than 900,000 acres (364,372 hectares) of rice fields. The hardest-hit areas include Bago (East Bago Region), Shwebo (Sagaing Region), Patheingyi, Maubin, Labutta, and Pyawbwe (Ayeyarwady Region), Mrauk-U (Rakhine State), Hpa An (Kayah State), and Minbu (Magway Region). In response, farmers who had sufficient seeds and time replanted their rice, while others switched to pulses and oilseed crops. Despite using good-quality seeds, increased mechanization, and the availability of fertilizers at more stable prices compared to the previous year, farmers have struggled to recover from the devastating floods. Ongoing conflicts have destroyed many bridges, making it difficult to transport agricultural inputs and supplies. Additional fees at various checkpoints controlled by both sides have further increased the cost of inputs for farmers. As a result, the overall main crop production forecast for 2024/25 is expected to decline.

In the Ayeyarwady Region, rice farmers face common diseases like rice blast and bacterial leaf blight, both of which are generally manageable through regular spraying. However, a significant challenge is the infestation of the Golden Apple Snail (*Pomacea canaliculata* Lamarck), which destroys young rice plants. Even though farmers use Snailcide 70WP to control snails, they continue to experience yield losses due to poor drainage systems, which allow Golden Apple Snails to spread rapidly through waterways.

In MY 2024/25, domestic rice prices remained strong, surpassing the reasonable market prices set by the regime. The attractive prices, coupled with ownership of traditional agricultural land, have motivated farmers to continue planting rice, regardless of production challenges, and weather conditions.

Post forecasts a recovery in rice production for MY 2025/26 as farmers seek high-yielding varieties and replant fields affected by the previous year's flooding. There are more than 40 registered rice seed production and distribution businesses, and some have partnered with the Ministry of Agriculture and individual farmers to improve the rice seed industry. Farmers now have better knowledge of using high-quality rice seeds and have strong connections with seed distributors and companies. Farmers fully utilize mechanization for land preparation and rice harvesting, except in some small and slope farms where the machinery cannot access.

Yield: Main rice crop yields typically range from 55-65 baskets (1 basket = 46 lb) per acre (2.8-3.35 MT/Ha) for Pawsan varieties and 60-140 baskets per acre (3.0-5.6 MT/Ha) for Aemahta varieties. However, severe flooding in 2024 caused a significant decline in yields. Pawsan yields dropped to 25-40 baskets per acre (1.28-2.0 MT/Ha), and Aemahta yields fell to 50-70 baskets per acre (2.58-3.6 MT/Ha). In high-elevation areas, where flooding was minimal, yields remained stable. In addition to the yield loss, the quality of the rice was also severely affected due to unusual rainfall during the harvest season in 2024. Excess moisture at harvest led to lower-quality rice, impacting factors like grain quality, texture, and overall marketability. In addition to flooding and weather-related challenges, the rice industry struggles with labor shortages, rising labor expenses, high production costs, and insufficient drainage systems.

1.2 Consumption

Rice is a staple in the Burmese diet, but consumption patterns differ by region. In rural areas, almost everyone eats rice three times a day because they prefer it, have few other breakfast options, and need a hearty meal for hard labor. In urban areas, most people eat rice only twice daily since they also enjoy snacks like samosa, palarta, ekyar kway, noodles, bread, dim sum, cakes, and other offerings from cafes

and tea shops. Some high-class individuals, young people, and health-conscious individuals eat rice only once a day due to changing eating habits and a preference for fast food.

Approximately 70 percent of Burma's population lives in rural areas, where the average annual rice consumption is about 170 kilograms per person. In urban areas, which make up 30 percent of the population, the annual per capita consumption is around 145 kilograms. A 2016 survey by The Myanmar Rice Federation (MRF) reported a national average of 155 kilograms per person, with some variation by region and ethnic group.

Burma also uses broken rice to make traditional snacks, noodles, livestock feed, and spirits. Industry sources forecast that the livestock sector will use 150,000 to 200,000 metric tons (MT) of broken rice in MY 2024/25. Broken rice, along with yellow corn, is a key source of starch and energy in animal feed, and its use depends on market prices. Smaller livestock producers, including backyard farms, are the primary consumers. The livestock sector is expected to shrink by about 40 percent in MY 2023/24 before slowly recovering in 2024/25.

Burma plants more than 200 rice varieties in 3 main categories, including Aemahta (long grain), Pawsan (medium and round), and Ngasein (low-quality short grain). Wealthy and some middle-class Burmese consumers prefer Pawsan varieties (including the premium Shwe Bo Pawsan primarily grown during the main season in the Shwebo district, Sagaing Region), which represent 7 percent of the total domestic rice production. Most Burmese consumers prefer high quality Aemahta types. Aemahta 25 percent broken rice is the main exported rice variety. However, Chinese importers demand higher quality rice (e.g., 5-15 percent broken). Food manufacturers mainly use Ngasein rice and broken rice to make noodles and traditional rice snacks.

The military government enacted the People's Military Service Law in 2010, which mandates that all men aged 18 to 35 and women aged 18 to 27 serve in the military for two years. Recent political turmoil and the effects of the People's Military Service Law have driven many young people to leave Burma, both officially and unofficially. This migration, along with civil conflict and a shrinking tourism sector, has reduced domestic rice consumption. Revised forecasts show lower consumption for MY 2024/25, a trend expected to continue into MY 2025/26.

1.3 Trade

Post forecasts Burma's rice exports at 2.2 MMT in MY 2025/26, balancing lower-than-normal production with the regime's easing of export earnings controls. In August 2024, the government reduced the percentage of export earnings that must be converted at the Central Bank's reference exchange rate (\$1 = 2100 MMK) from 35 to 25 percent of total export earnings. This change gives Burma exporters more flexibility in managing their earnings. Since 2023, severe and prolonged armed conflicts, high logistics costs, and rising domestic prices have significantly impacted border trade. As a result, only small amounts of broken rice have been exported across the border each month.

In MY 2023/24, Burma exported 2.767 MMT of rice, valued at \$1.45 billion, a sharp 75 percent increase over the previous year. However, only 4 percent of total rice exports were shipped through the border. This increase was driven by strong demand from Indonesia and high carryover stocks from the previous year. Indonesia was Burma's largest rice importer in 2024 (January–December), followed by China,

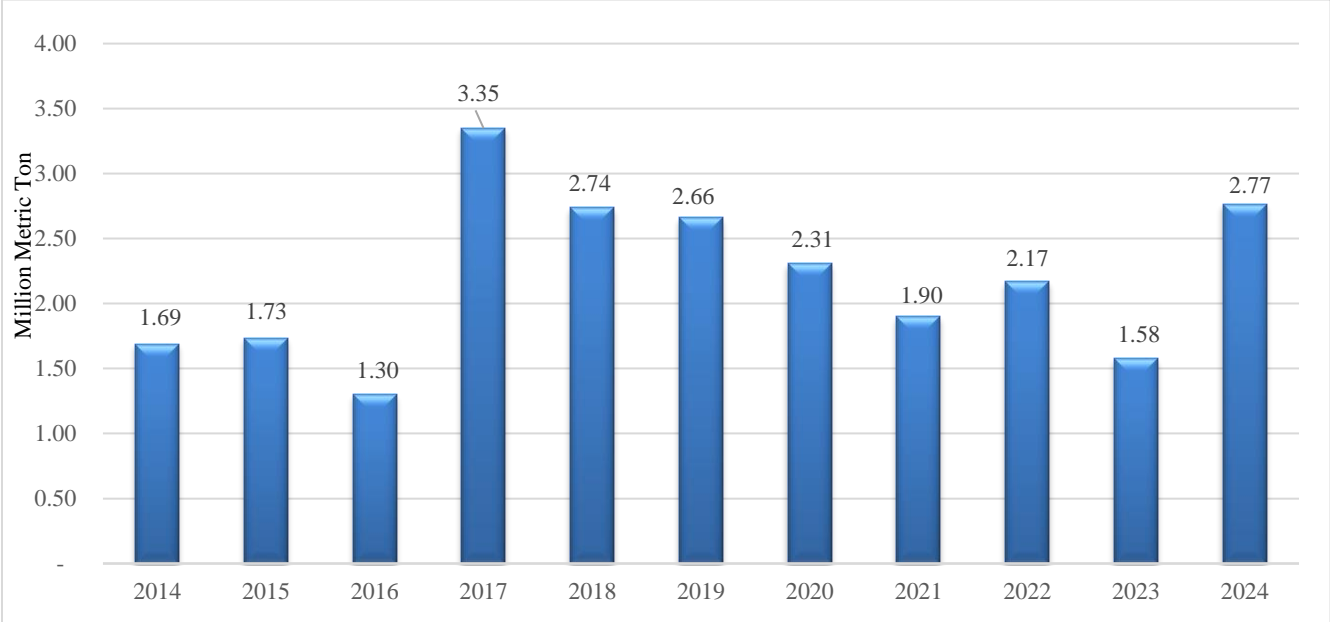
Belgium, and the Philippines. Indonesia, China, and the Philippines were the major buyers of head rice, while China, Belgium, and the Philippines were the main buyers of broken rice during the same period.

Table 1.2: Import Tariff for Rice in Burma

Commodity	Purpose	Unit of Quantity	MFN Rate (%)
Rice	Consumption	kg	5
Rice seed	Sowing	kg	0

Source: Myanmar Customs Department

Figure 1.1: Burma’s Rice Exports (MMT)



Sources: Ministry of Commerce, MRF

1.4 Prices

The Department of Consumer Affairs (DOCA), under the Ministry of Commerce, issues monthly reasonable market prices for all varieties of rice. The MRF encourages affiliated associations, commodity depots, exporters, and rice companies to adhere to the monthly reference prices. Guidance from DOCA stipulates the sale price should not exceed 8 percent above the reasonable market prices. DOCA issues the separate prices for the modern trade with consumer packaging at mini-marts and supermarkets. However, small and medium rice retailers do not adhere to the prescribed price; instead, they add their customary profit margin to their established purchasing costs. In MY 2024/25, the price for rough rice (Aemahta variety) ranged between 1,400,000 MMK and 1,700,000 MMK per 100 baskets (\$155 to \$189/MT), depending on moisture content and rice quality. In contrast, premium Pawsan rice varieties fetched significantly higher prices, ranging between 2,500,000 MMK and 3,000,000 MMK per 100 baskets (\$278 to \$333/MT).

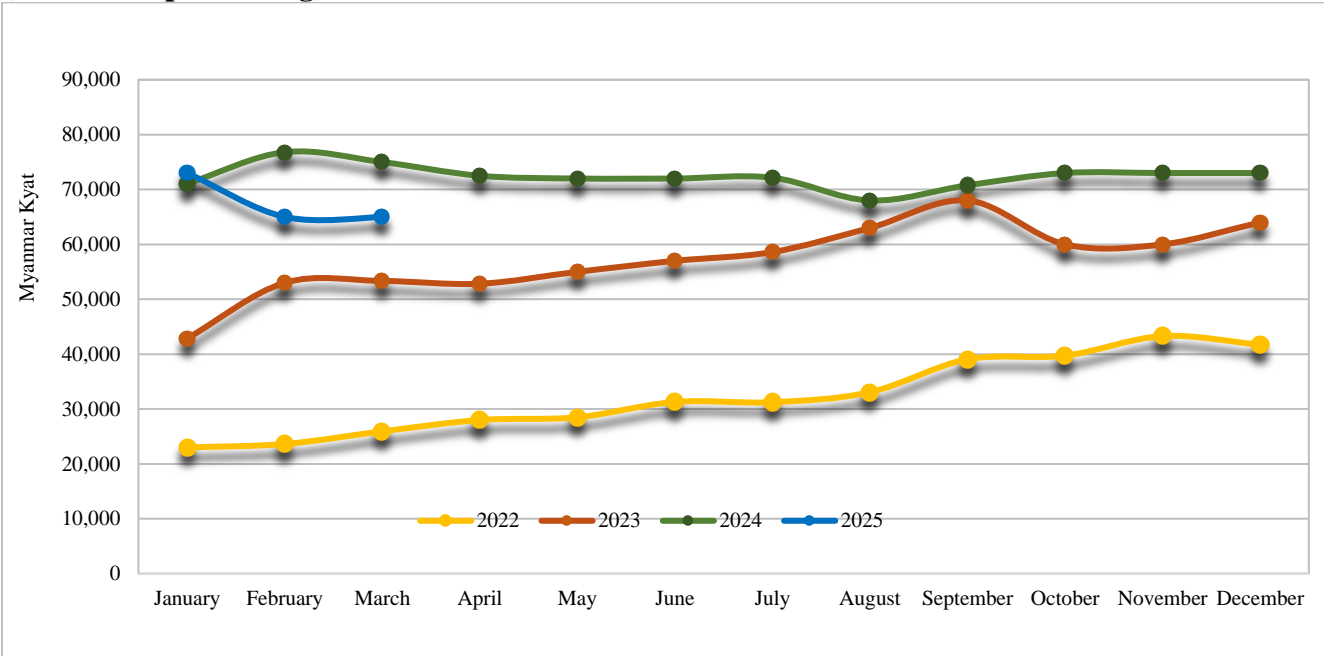
Typically, the domestic wholesale rice prices drop when the new main crop supply enters the market in November, then recovers at the end of February before the harvest of the second crop. The average domestic wholesale prices for both Aemahta 25 percent broken rice and Shwe Bo Pawsan increased in

MY 2023/24 due to the devaluation of the MMK, high production cost, and high fuel cost, and they remain at a high level in MY2024/25.

Since 2024, the domestic wholesale prices for both superior-quality Shwe Bo Pawsan and low-quality Aemahta 25 percent broken rice have fluctuated slightly around the reasonable market price set by the MRF. The prices for Aemahta 25 percent broken rice declined in February and March due to the low reasonable market prices set by DOCA.

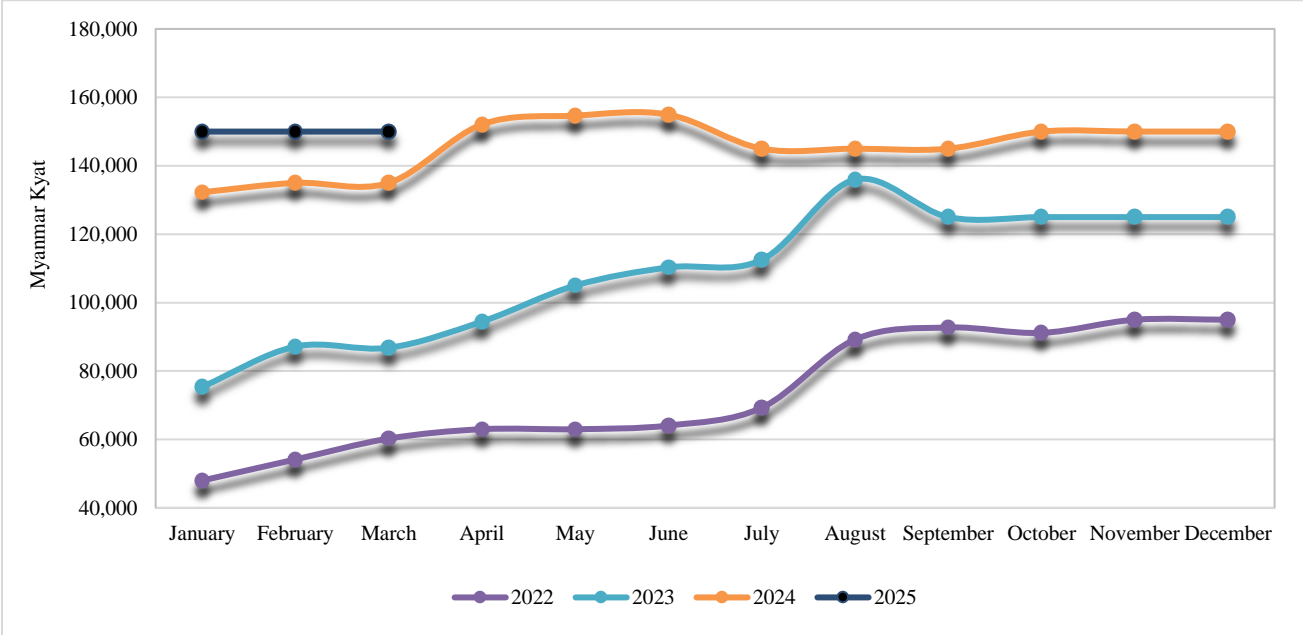
To control high rice prices, the regime monitors the market and, in June 2024, investigated rice merchants, including millers, traders, and exporters, who were suspected of selling rice above the reasonable market prices. For further details, please refer to the GAIN report titled “*Rice Merchants Operating in Myanmar Under Investigation for High Rice Prices.*” As a result of these interventions, domestic wholesale prices have remained flat in 2024, although some retail outlets continue to charge higher prices. In response to the rising domestic prices, the MRF has been selling rice at fair prices for factory workers and low-income individuals since February 2023. In June 2024, MRF launched the Good Rice, Good Price program, allowing consumers to purchase both Pawsan and Aemahta rice at reference prices. According to MRF’s 2024 annual report, more than 500,000 rice sacks (10 kg each) of Pawsan and Aemahta varieties were sold under the program in 2024.

Figure 1.2: Average Monthly Wholesale Prices for Aemahta 25 Percent Broken (low grade) Rice (MMK/108-pound Bag)



Source: MRF

Figure 1.3: Average Monthly Domestic Wholesale Prices for Shwe Bo Pawsan Rice (MMK/108-pound Bag)



Source: MRF

1.5 Policy

On October 19, 2024, the Steering Committee on Protection of Farmer Rights and Enhancement of Benefits set the basic reference price for rough rice (paddy). For the 2024 monsoon and 2025 summer seasons, the government set the floor price for rough rice (paddy) with a maximum of 14 percent moisture content and minimum quality criteria at 950,000 MMK per 100 baskets (\$105/MT). However, the current market price for Aemahta rice is significantly higher, ranging from 1,800,000 to 2,195,000 MMK per 100 baskets (\$200–243/MT).

The Myanmar Agricultural Development Bank (MADB), under the Ministry of Planning and Finance, provides seasonal farm loans and short- and long-term credit for various agricultural crops, including rice, oilseeds, and pulses. The loan amount varies depending on the commodity and season. For rice farmers, MADB offers credit of up to 150,000 MMK (\$33.33) per acre, for a maximum of 10 acres, at a 5 percent interest rate. However, this government-provided credit only covers about 20–25 percent of production costs. As a result, most farmers must seek additional loans from private lenders, especially large-scale farmers cultivating more than 10 acres.

Since June 2024, Myanmar Fertilizer, Seed and Pesticide Entrepreneurs Association (MFSPEA) has set monthly prices for urea, rock phosphate, and Di Ammonium Phosphate based on Yangon prices, ensuring that farmers can purchase them at reasonable and affordable rates.

Table 1.3: Type of Loan, Disbursement and Repayment Period Provided by MADB

Type of Loan	Disbursement Period	Repayment Deadline
Pre-monsoon	January to March	February of the following year
Monsoon	May to September	Next April
Winter	October to January	Next September

Note: Farmers, who have not paid off previous loans, are not eligible for new ones.

Due to high fertilizer costs in 2022 and 2023, access to credit has become crucial for farmers to sustain rice production. To support this, the Department of Agriculture (DOA) continues to provide a credit of 200,000 MMK per acre (\$44.44) through contract farming, particularly to encourage seed production. This funding is part of the National Economic Promotion Project, offering an additional financial resource for farmers.

The Burma regime requires rice exporters to obtain an export license to export rice and broken rice. Exporter must exchange 25 percent of export earnings with the reference exchanged rate (\$1=2100MMK) and the remaining 75 percent can be exchanged with the market trading rate published by [Central Bank of Myanmar](#).

The Ministry of Commerce issued an order on November 3, 2023, requiring rice traders storing at least 50 MT of rice or 5,000 basket (104 MT) of rough rice (paddy) to register in the [Myanmar Rice Online \(MyRo\) System](#) for better management of production and distribution data. A new order in October 2024 lowered the threshold to 25 MT of rice or 2,500 baskets (52 MT) of rough rice (paddy), requiring more warehouses to register by December 24, 2024. MRF reported that more than 3,500 warehouses have registered by the December deadline.

1.6 Marketing

Farmers primarily sell paddy (rough) rice to rice millers directly through contract farming or through local collectors, who are typically sent by rice millers. The rice millers then sell to rice wholesalers or directly to exporters. Wholesalers then distribute the rice to retail shops and department stores. Most farmers must sell their rice immediately after harvest to pay back farm loans and to get cash for their home expenditures, especially given the war-related uncertainty. Usually, there are some large farmers who decide to store rice and wait for higher prices. Some large agribusiness companies operate in the entire supply chain (e.g., planting, milling, trading, and providing inputs).

There are two main rice trading centers: the Bayintnaung rice trading center and the Warden rice trading center. Both are in Yangon. The Warden rice trading center mostly manages rice from the Ayeyarwady Delta region and distributes its rice to the domestic market and China. The Bayintnaung rice trading center mostly manages rice from Bago and Yangon and exports most of its rice. Farmers typically sell paddy rice immediately after harvest, when the moisture content is usually above 14 percent. Given the higher moisture content and influx of supply, buyers often offer prices below the market prices published by industry sources and use a different weight standard (e.g., 50-52 pounds per basket).

2. Corn

Table 2.1: Burma’s Corn Production, Supply, and Distribution

Corn	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
Burma (Myanmar)	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	670	700	595	680	0	680
Beginning Stocks (1000 MT)	324	324	134	86	0	96
Production (1000 MT)	2850	3100	2500	2850	0	2950
MY Imports (1000 MT)	10	12	10	10	0	10
TY Imports (1000 MT)	10	12	10	10	0	10
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	3184	3436	2644	2946	0	3056
MY Exports (1000 MT)	2900	2900	2400	2300	0	2300
TY Exports (1000 MT)	2900	2900	2400	2300	0	2300
Feed and Residual (1000 MT)	100	400	100	500	0	500
FSI Consumption (1000 MT)	50	50	50	50	0	50
Total Consumption (1000 MT)	150	450	150	550	0	550
Ending Stocks (1000 MT)	134	86	94	96	0	206
Total Distribution (1000 MT)	3184	3436	2644	2946	0	3056
Yield (MT/HA)	4.2537	4.4286	4.2017	4.1912	0	4.3382

(1000 HA) ,(1000 MT) ,(MT/HA)

MY = Marketing Year, begins with the month listed at the top of each column

TY = Trade Year, which for Corn begins in October for all countries. TY 2025/2026 = October 2025 - September 2026

OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

Source: Post calculations are based on interviews with the farmers, traders, exporters, Myanmar Corn Industrial Association, Department of Agriculture, and TDM.

2.1 Production

Post forecasts an increase in Burma’s corn production for MY 2025/26, primarily due to a recovery in yield per unit area and favorable weather conditions that are expected to support good yields. Strong domestic prices and high export demand encourage farmers to pay more attention to farming practices. However, the harvested area is likely to remain unchanged, as these incentives are counterbalanced by ongoing conflicts in key corn-producing regions.

Production and quality for MY 2024/25 are expected to be lower due to several challenges. Ongoing civil conflicts in key corn-producing regions, flooding, irregular rainfall during the harvest season, and late arrival of high yielding corn seed has negatively impacted production. Additionally, new fighting in January 2024 in major corn-growing areas of southern Shan State such as Hsi Hseng Saing, Sike Khaung, and Hopong (in the Pa’O Self-Administered Zone), has further disrupted planting activities. As a result of these uncertainties, traders are reluctant to provide advanced funding to farmers to purchase seeds and fertilizers.

Trade sources estimated that sufficient corn seeds supply for planting across the entire country will be available to supply in May 2025. However, farmers, who typically collect seeds and fertilizer in March and April, are concerned about timely availability, as only leftover seeds from the previous year are currently on the market. Some have purchased seeds in advance to avoid potential delays like last year. Burmese farmers plant 8,000 -10,000 MT of seeds annually, sourcing them from local producers and seed importers.

The overall cost of corn cultivation has increased steadily, and credit is a major challenge for corn farmers. Farmers now need to invest between 600,000-700,000 MMK (\$133-155) per acre for monsoon corn and 800,000- 1,000,000 MMK (\$178-222) per acre for dry season corn cultivation.

The primary corn-producing regions during the monsoon season are Shan State, Kachin State, Kayah State, Sagaing Region, and Kachin State, which account for 85-90 percent of the total monsoon corn production area. Meanwhile, the Ayeyarwady Region is the leading producer of dry-season corn, accounting for 30-33 percent of the total dry season corn production area. Farmers in the Ayeyarwady Region experience minimal crop damage and achieve higher yields, driven by favorable dry-season weather and increased urea fertilizer use. Farmers typically use 25–75 kg of urea fertilizer for the main crop (monsoon season) and 50–250 kg for the second crop (dry season).

Currently, there are no government subsidies available for corn farmers in Burma. However, the Myanmar Corn Industrial Association (MCIA), with support from private banks, has provided production financing to corn farmers in Ayeyarwady, offering credit of 1,000,000 MMK (\$222) per acre to help cover higher production costs. The interest rate in MY 2024/25 is 14 percent. Typically, loans are disbursed in November, and farmers repay them between July and August, after harvesting in February or March.

Farmers reported that the main monsoon corn crop yield in MY 2024/25 was between 2.5- 4.5 MT per hectare, while the second winter crop yielded an average of 4.5-5.5 MT per hectare. Monsoon crops rely heavily on rainfall, and farmers harvest only 15-20 percent of corn using machines, with the rest being threshed by hand. Farmers reported that harvesting by machine tends to increase crop waste. Nearly all of Burma's corn is grown from hybrid seeds, primarily imported from Thailand and India. Two major companies dominate the seed market: Charoen Pokphand (CP Group) and Myanmar Awba Group, accounting for 85 percent of the market share. Two popular seed varieties are CP-808 and NK 625 (Syngenta).

Yield: Rainfall, seed quality, weather conditions, and fertilizer application are the key factors influencing corn yield. Farmers in Heho, Shwe Nyaung, and Yatsauk achieved normal yields; however, some experienced lower yields and poorer quality due to flooding and unusual rainfall during the harvest period. During the 2024 monsoon corn season, delays in obtaining high-yielding hybrid corn seeds (CP 808, GT 625) forced farmers to plant lower-quality varieties, further impacting yields. Post estimates the overall corn crop yield per unit area at 4.19 MT/Ha in MY 2024/25.

Post has revised its national corn production estimates starting from the 2023/24 marketing year to better reflect actual production levels. According to the PSD table, Burma's corn exports in MY 2023/24 have surged to 2.9 MMT, exceeding the total estimated national production. This discrepancy suggests that most of the previously informal exports have shifted to formal channels due to the closure of border gates. Historically, post anticipated increased corn cultivation in conflict-affected brown areas controlled by ethnic groups; however, reliable production data from these regions were unavailable. The confirmed

high export volume now indicates that corn production in these areas is higher than previously estimated.

In response, post adjusted production estimates to align with export levels. Additionally, a recent survey indicates that farmers in parts of Northern Shan, Kayah State, and Kachin State are practicing double cropping, further supporting the need for a production estimate revision.

2.2 Feed Consumption

Post forecasts no changes to the domestic feed consumption in MY 2025/26 from MY 2024/25 as the livestock industry remains poorly developed, faces high feed cost, and has limited demand for livestock products. Corn demand from local feed millers remains lower than the regular demand in pre-coup average consumption due to weak demand for formulated feed from the poultry industry. Feed cost represents about 70 percent of the total broiler production cost and 62 percent of the total swine production cost. According to feed price published by feed mills, the prices for broiler and layer feed in March 2025 increased by 60 percent from the same period last year. Additionally, the prices for broiler and layer day-old chicks (D.O.C) nearly tripled compared to last year. Industry sources indicate that domestic broiler production has shrunk as producers face high production costs, high fuel costs for distribution, an unstable security environment, difficult logistics—especially in conflict-affected areas, unreliable electricity supply, and declining purchasing power for meat among domestic consumers.

Myanmar Livestock Federation forecasts Burma's feed demand at 1.8 - 2.0 MMT in 2024/25, with domestic corn constituting 40- 45 percent of the total raw materials for livestock feed production. Post's forecast, based on exports and production estimates, is around 550,000 metric tons to avoid a negative balance. In addition to the declining purchasing power of Burmese consumers and emigration by young people, the decline in the number of tourists has also lowered the demand for meat and eggs when compared to pre-coup levels.

2.3 Trade

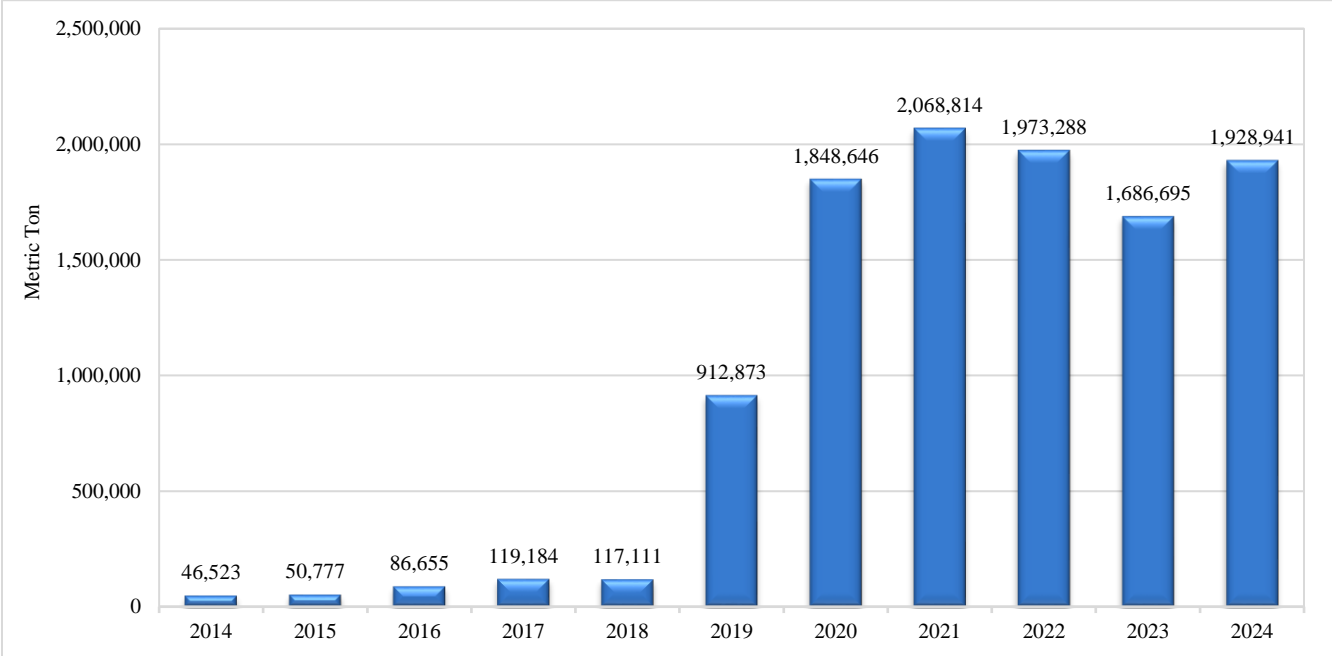
Post forecasts Burma's corn exports for MY 2025/26 at 2.3 MMT, due to low stocks from the previous year, high domestic prices, and low world prices. The exports for MY 2024/25 have been revised down as a result of a drop in production, poor world prices, transportation difficulties from conflict-affected areas, and border gate closures. High transportation costs make it hard to move corn from key production areas, especially in Shan State, to markets. Exporters ship corn from the eastern part of Shan State to Thailand by land through the Tachileik border. However, they face extra costs at checkpoints controlled by both regime and anti-regime groups.

Burma's largest export markets for corn in MY 2023/24 were Thailand, China, the Philippines, and India. Industry reports show that Burma exported more than 1.275 MMT of corn to Thailand in MY 2023/24, making it the biggest market. Under the ASEAN Free Trade Area agreement, Thailand allows duty-free corn imports from Burma between February and August. From September to January, importers must pay a 73 percent tariff, so Burma exports corn to Thailand primarily during the duty-free window.

Burma suspended corn exports to India in MY 2020/21, but resumed exports in MY 2023/24 due to the implementation of zero tariffs. In June 2024, India officially began importing corn from Burma at zero tariffs. A trade source reported that India has recently offered to purchase 130,000 MT of corn from Burma in MY 2025/26.

Security concerns and high transportation costs have forced Burma’s exporters to shift to sea routes, instead of land transport. Both the regime and anti-regime groups control checkpoints on the way to the Tachileik border and ask for money from corn trucks to passthrough, further increasing land transportation costs. Burma exports corn, particularly from eastern and southern Shan State to Thailand via the land border due to their proximity.

Figure 2.1: Burma’s Corn Exports (MT)



Sources: TDM

Table 2.2: Burma’s Import Tariff for Corn

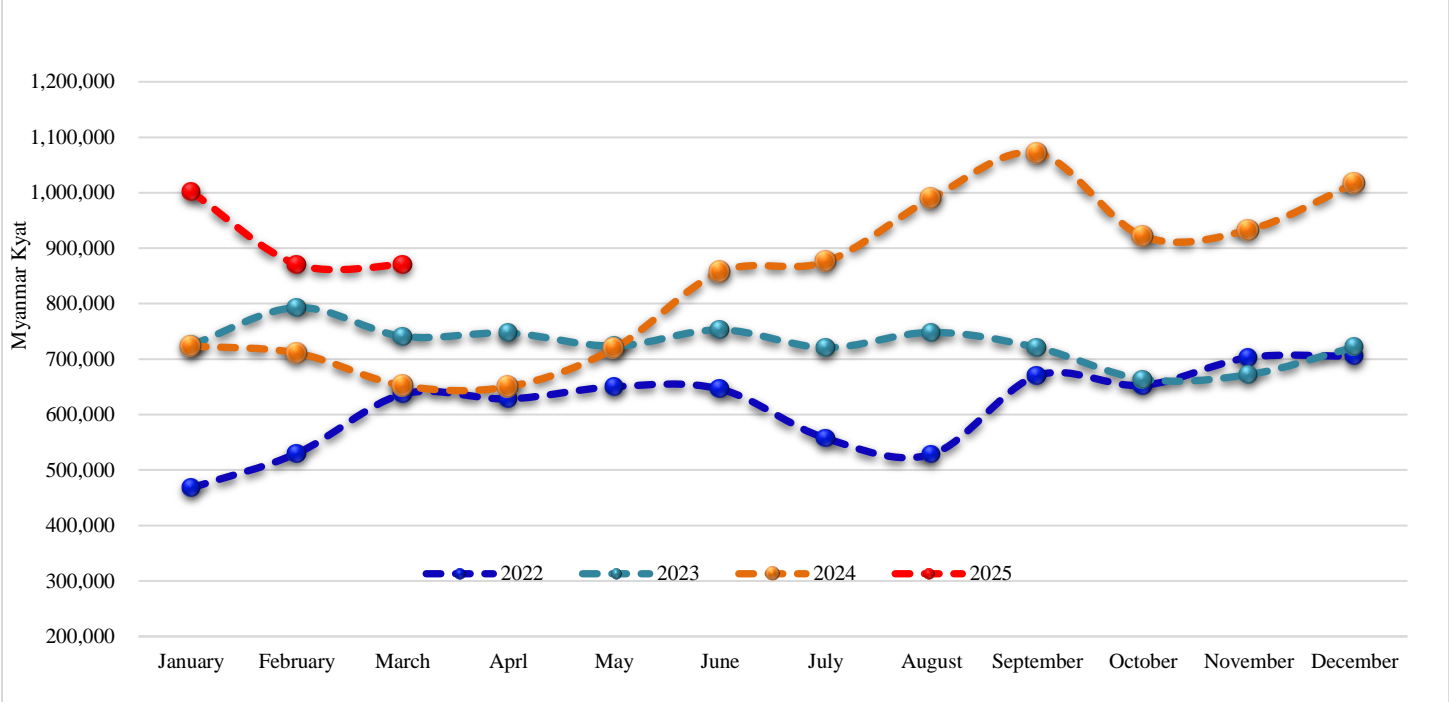
Commodity	Purpose	Unit of Quantity	MFN Rate (%)
Corn Seed	Sowing	kg	0
Corn Flour	Consumption	kg	5

Source: Myanmar Customs Department

2.4 Prices

Burma’s corn price increased between July and September 2024 due to increased export demand from India under the new zero tariff rates, as well as active demand from domestic feed mills. However, prices declined in October and November driven by lower export demand from Thailand outside the duty-free period, and new crops entering the market. The prices increased again in December and January before falling in February and March due to poor world prices. Burma’s domestic corn prices strongly depend on export demand and global market conditions.

Figure 2.2: Monthly Domestic Wholesale Prices (MMK/MT) for Yellow Corn at Bayintnaung Market, Yangon



Source: etrademyanmar.com
 Daily prices: <http://market.doca.gov.mm/>

2.5 Policy

The regime requires export licenses to export corn (please see [Burma Restrictions on Export Earnings](#) for details on Burma’s recent policies on foreign export controls). Exporters have confirmed that obtaining a corn export license for regular exporters takes as little as three days. This streamlined process is part of the regime’s efforts to facilitate agricultural exports and boost export earnings.

Companies in Burma must register with the General Administration of Customs China (GACC) to export corn to China. Inspectors from the Department of Consumer’s Affairs and the Myanmar Product Inspection and Testing Service Limited (MITS) conduct field inspections to confirm that the product meets the requirements of the SPS protocol negotiated with China. As of April 24, 2024, there are 133 warehouses and 59 dryers between 112 companies that the GACC has approved.

3. Wheat

Table 3.1: Burma’s Wheat Production, Supply, and Distribution

Wheat	2023/2024		2024/2025		2025/2026	
	Jul 2023		Jul 2024		Jul 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Market Year Begins						
Burma (Myanmar)						
Area Harvested (1000 HA)	55	55	55	50	0	50
Beginning Stocks (1000 MT)	77	77	85	83	0	78
Production (1000 MT)	80	80	80	70	0	70
MY Imports (1000 MT)	368	356	375	375	0	375
TY Imports (1000 MT)	368	356	375	375	0	375
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	525	513	540	528	0	523
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Feed and Residual (1000 MT)	0	0	0	0	0	0
FSI Consumption (1000 MT)	440	430	455	450	0	450
Total Consumption (1000 MT)	440	430	455	450	0	450
Ending Stocks (1000 MT)	85	83	85	78	0	73
Total Distribution (1000 MT)	525	513	540	528	0	523
Yield (MT/HA)	1.4545	1.4545	1.4545	1.4	0	1.4

(1000 HA) ,(1000 MT) ,(MT/HA)
 MY = Marketing Year, begins with the month listed at the top of each column
 TY = Trade Year, which for Wheat begins in July for all countries. TY 2025/2026 = July 2025 - June 2026

OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

Source: Post Calculation based on [TDM](#) data and interviews with industry sources.

3.1 Production

Post forecasts wheat production in MY 2025/26 at 70,000 MT, significantly impacted by ongoing conflicts in major wheat-producing areas, particularly in Sagaing and Northern Shan State. Low profitability and a lack of competitive advantage over imported wheat and flour continue to hinder wheat production in Burma. Wheat was mainly planted in Sagaing (80 percent), Shan State (15 percent), and Mandalay (4 percent) in MY 2024/25. Farmers usually plant wheat between October and November, with harvest taking place between January and March. Wheat is not part of Burma's top ten major crops, and there is limited government interest in enhancing its production. Farmers from Southern Shan State have reported farmers have shown little interest in expanding cultivation due to low profits.

Planting time, water availability, and weather conditions are key determinants of yield. Wheat yield ranges between 1.2-1.7 MT/Ha. Some fields are far from water sources and depend on irrigation. Wheat farmers maintained a limited farming area in 2024 due to the high cost of fuel to pump water for irrigation, poor seed quality, high production costs, and low profit compared to other crops. Imported

wheat is more affordable than domestic wheat due to high transportation costs within Burma, so wheat acreage has gradually shrunk since MY 2017/18. The lack of incentives and government support has led many farmers to switch from wheat to crops like chickpeas, niger, and mustard in Southern Shan State, where profit margins are more favorable. As a result, wheat is only planted in areas where other crops cannot thrive, which has caused wheat acreage to decline from MY 2023/24 to 2024/25. Though the Department of Agricultural Research (DAR) develops several wheat varieties (e.g., Zalote white wheat - 1, Yezin-12, V-1287), there is little interest from farmers in expanding wheat production.

3.2 Consumption

Post forecasts MY 2025/26 wheat consumption at 450,000 MT, which is still below pre-coup demand due to high prices, difficulty of transportation to conflict affected areas, and reduced operating hours of wheat mills due to power outages. Burma imported 356, 000 MT of wheat in MY 2023/24, which is lower than pre-coup demand.

Ongoing political turmoil in Burma has caused an increasing number of people to leave the country, resulting in a decline in domestic demand for wheat. As a result, wheat millers have either suspended their distribution or reduced the volume they sell to conflict-affected areas. Safety concerns and transportation challenges in these regions make it difficult for millers to maintain regular distribution channels, further contributing to low consumption of wheat in those areas.

There are only three major wheat milling businesses in Burma, U Kyu Family Group, Lluvia (part of Capital Diamond Star), and Wilmar Myanmar, all of which operate large wheat mills. Since MY2021/22, U Kyu Family Group, a wholly Burma-owned company, has reduced its operations by 88 percent, dropping from 10,000 to 1,200 MT/month of wheat flour. This reduction is mainly due to the regime's policies, including the lack of advance payments for imports and complicated import license procedures. The market share lost by U Kyu Family Group has shifted to Wilmar Myanmar and Lluvia, both of which are co-owned by foreign companies and can more easily secure the necessary advance payments for wheat imports and are also involved in the export business.

Burma's wheat-based foods are bakery items, biscuits, plata (Burmese flat bread), noodle varieties, including instant noodles, and various kinds of breakfast snacks. Most local wheat-related food manufacturers use at least some wheat imported informally across the border from India due to its lower cost compared to other wheat suppliers (e.g., Australia, the United States, and Canada), which have higher quality grain.

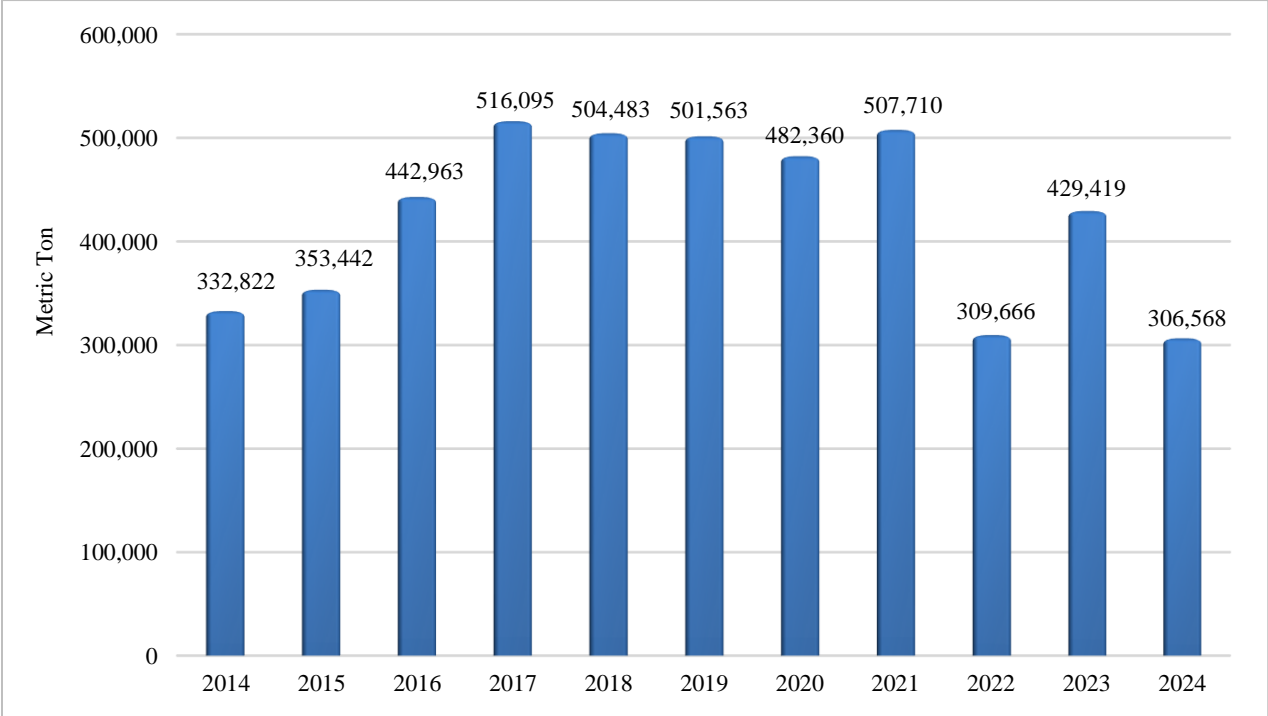
3.3 Trade

Post forecasts wheat imports at 375,000 MT in MY 2024/25 and MY 205/26 which is still below the pre-coup import volume of 450,000-500,000 MT. This projection is based on import licensing challenges, policy changes on importation, and declining local purchasing power. In MY 2023/24, Burma primarily imported wheat grain from Australia, Turkey, Ukraine, Thailand, and the United States, while also importing 7,549 MT of wheat flour, mainly from Turkey, India, Thailand, China, and the United States, representing a 38 percent decrease from the previous year.

Though informal wheat flour imports are difficult to track, they are expected to persist in the near future due to ongoing demand and the difficulty of obtaining import license. For this reason, total wheat imports for MY 2024/25 and MY2025/26 may exceed the forecasted 375,000MT. The price for informal

wheat flour is cheaper than the price for wheat flour produced from imported wheat grain. In MY 2023/24, Australia supplied more than 73 percent of Burma’s total wheat grain imports. Australia’s wheat exports benefit from zero duties under the ASEAN-Australia-New Zealand Free Trade Area. Wheat importers must obtain import licenses, which are subject to the frequent changes in import/export policies. Importers reported that it takes approximately 4-6 months to get their license. Importers must apply for an import license via the [Myanmar Tradenet 2.0](#) platform.

Figure 3.1: Burma’s Wheat Imports (MT) by Year

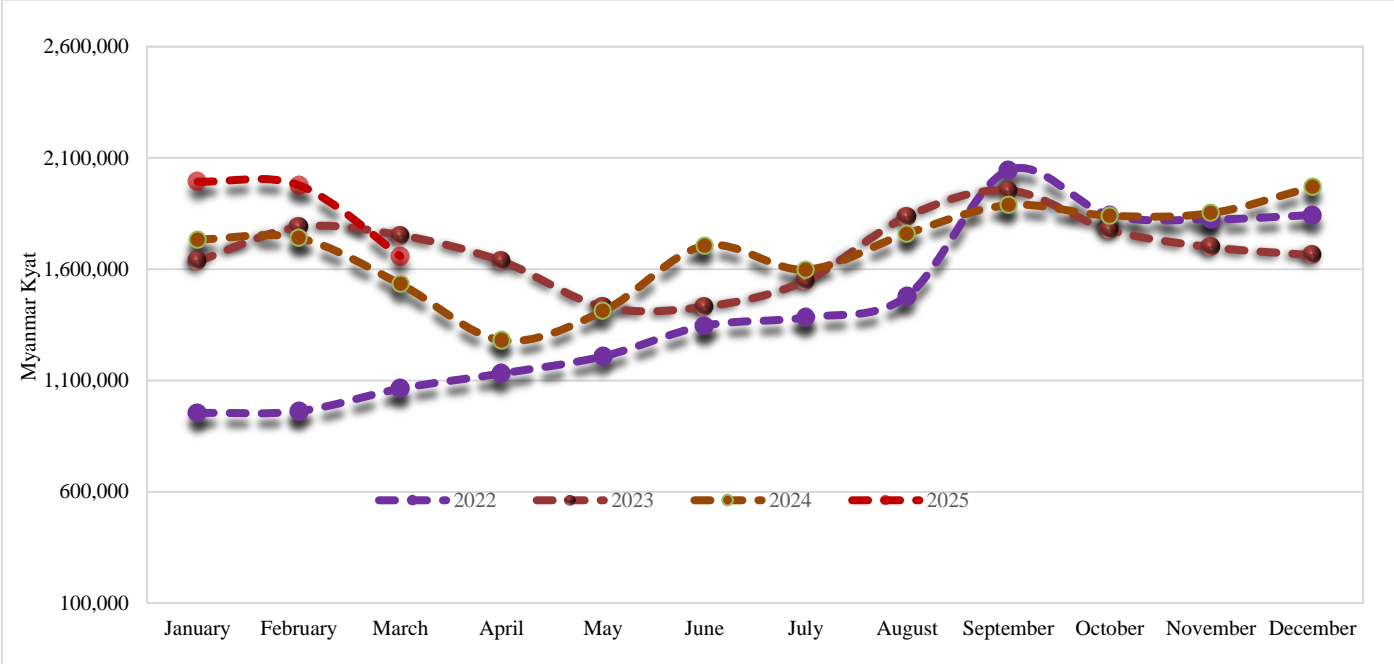


Source: [TDM](#)

3.4 Prices

Domestic wheat prices in 2024 have fluctuated around last year's levels due to a lack of strong domestic demand. Domestic wholesale prices for wheat usually increase between September and December due to reduced stocks during the off season. When demand from local wheat mills increases, wheat prices typically rise. However, once imported wheat enters the market, the price tends to decline due to the added supply. Prices for imported wheat flour vary according to the type, but are usually cheaper and of higher quality than locally produced wheat. However, formally imported wheat cannot compete on price with cheaper wheat flour imported informally from India. Domestic wheat prices mostly depend on demand from the mills in Mandalay, Sagaing, and Shan State since, as they primarily use local wheat.

Figure 3.2: Average Domestic Price for Wheat Grain in Mandalay Market (MMK/MT)



Source: etrademyanmar.com ; Commodity Exchanged Center Mandalay

3.5 Policy

The military regime is seeking to reduce imports of “non-essential” products to save foreign currency and reduce the trade deficit. Wheat importers are required to apply for an import license with restrictions on export earnings (see [Burma Restrictions on Export Earnings](#)). Foreign currency controls implemented by the regime have limited the ability of importers to secure foreign currency to purchase goods. Importers complain that the process to obtain an import license is lengthy and filled with delays and uncertainty. Obtaining import licenses for wheat flour is more difficult than grain due to lack of job opportunities for local people and unavailability of byproducts such as wheat bran and wheat feed, which are essential for animal feed.

The Department of Trade requires importers to have an import license before the product leaves the exporting country, making it harder for wheat importers to secure contracts in time and forces them to reapply for a license when a shipment is delayed. Importers also must use earnings from exports to procure wheat for import, forcing some wheat importers to start exporting other products, such as rice, pulses, and corn. The import tariffs for wheat grain and flour are 5 percent and 10 percent respectively.

Table 3.2: Import Tariff for Wheat in Burma

Commodity	Purpose	Unit of Quantity	MFN Rate (%)
Wheat Grain	Consumption	kg	5
Wheat Flour	Consumption	kg	10

Source: Myanmar Customs Department

Attachments:

No Attachments