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Report Highlights:

FAS Rangoon forecasts Burma's MY 2026/27 rice and corn production will decline because of reduced planted area and lower yields. Contacts are reporting that higher international freight costs are negatively influencing Burma's rice exports and wheat imports. In January 2026, the regime relaxed controls on export earnings, but import restrictions remain in place. Burma's MY 2026/27 corn exports will stay at MY 2025/26 estimated levels despite lower MY 2026/27 production as rising shipping costs may favor Burma's exports to neighboring China and Thailand. Since March 2026, Burma's Ministry of Commerce has begun issuing burn-free certificates for corn exports to Thailand.

Executive Summary

Post forecasts Burma's (also known as Myanmar) rice production to decline in MY 2026/27 because of shrinking planted area and decreasing yields. Rising global fuel prices are leading to higher production costs across the value chain - harvesting, milling, transport, and shipping costs - eroding the price competitiveness of Burmese rice in international markets. Lower domestic production in response to reduced application of crop inputs and spiking fertilizer prices will further limit the exportable surplus. MY 2025/26 and 2026/27 domestic rice consumption are estimated to drop slightly reflecting falling per capita income, growing preference for alternative foods, urbanization, and continued emigration.

Post forecasts Burma's rice exports in MY 2026/27 to stay flat relative to MY 2025/26. From January 1, 2026, the Central Bank of Myanmar (CBM) reduced the mandatory conversion requirement on export earnings at the reference exchange rate ($1 = 2,100 Myanmar kyat (MMK)) from 25 percent to 15 percent of total export earnings. Post estimates Burma's MY 2025/26 rice exports to decline from previous years given weak international demand, reduced supply, and higher freight and insurance costs stemming from the Middle East conflict.

Post forecasts corn production to decline by 10 percent in MY 2026/27 primarily due to high production costs and reduced cultivation area. Burma's corn exports to Thailand and China will benefit from proximity and pick up in response to rising global shipping prices. Sources report that Burmese corn operations have begun to sell crop at the farm-gate or ex-warehouse which requires feed mills to pick up the product and assume freight for overland shipments to neighboring markets. In March, the Ministry of Commerce began issuing smoke-free (burn-free) certification for Burmese corn exports to Thailand owing to a newly implemented smoke-free requirement. Yet Burma's domestic feed consumption will continue to decline as the livestock sector faces supply constraints of import-dependent feed ingredients, high feed costs, power shortages, and elevated fuel costs.

Burma's wheat production is forecast flat and is limited by poor seed quality, low profitability, and limited government subsidy and development efforts. Imports will continue to constitute around 73 percent of Burma's wheat supply given insufficient local production. Although wheat demand from the food processing sector remains strong, Post forecasts MY 2026/27 wheat imports to decline by 4 percent year-on-year due to high import costs.

1. Rice

1.1 Production

Table 1.1. Burma: Rice Production, Supply, and Distribution

Rice, Milled	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jan 2025		Jan 2026		Jan 2027	
Burma (Myanmar)	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	6860	6860	6800	6830	0	6500
Beginning Stocks (1000 MT)	1216	1216	949	949	0	1254
Milled Production (1000 MT)	11900	11900	12000	12000	0	11000
Rough Production (1000 MT)	18594	18594	18750	18750	0	17188
Milling Rate (.9999) (1000 MT)	6400	6400	6400	6400	0	6400
MY Imports (1000 MT)	5	5	5	5	0	5
TY Imports (1000 MT)	5	5	5	5	0	5
Total Supply (1000 MT)	13121	13121	12954	12954	0	12259
MY Exports (1000 MT)	2572	2572	2600	2200	0	2200
TY Exports (1000 MT)	2572	2572	2600	2200	0	2200
Consumption and Residual (1000 MT)	9600	9600	9400	9500	0	9400
Ending Stocks (1000 MT)	949	949	954	1254	0	659
Total Distribution (1000 MT)	13121	13121	12954	12954	0	12259
Yield (Rough) (MT/HA)	2.7105	2.7105	2.7574	2.7452	0	2.6443
(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 2026/2027 = January 2027 - December 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

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

Post forecasts Burma's MY 2026/27 milled rice production to drop 8 percent as planted area and yields decline. Due to the ongoing conflict in the Middle East, rising fuel prices and shortages, along with fertilizer scarcity and higher input costs, production costs are climbing. Sources report that these challenges will lead farmers to reduce cultivated acreage, particularly in the upcoming main crop (monsoon) paddy season in MY 2026/27. At the same time, limited fertilizer usage and irrigation constraints will likely reduce the average rice yield per acre in MY 2026/27.

Post lowered the MY 2025/26 area harvested estimate by 1 percent from MY 2024/25 in response to rising production costs and falling domestic paddy rice prices. According to farmer contacts, the cost for main season rice production ranges between 600,000-700,000 Myanmar kyat (MMK[1]) ($150-175) per acre and for the second crop production cost is 800,000-1,300,000

[1] Throughout the report, Post used the following market exchange rate: $1= 4,000 Myanmar kyat (MMK).

MMK ($200-325) per acre depending on input utilization. From early March, the gasoline price increased from 2,415 MMK ($0.60) per liter to 4,625 MMK ($1.16) per liter in early April. Other sources have shared that prices in some fuel scarce areas reached12,000 MMK ($3) per liter. Farmers anticipated higher prices for the MY 2025/26 second crop, but actual farm gate prices remained low, and farmers responded by reducing input usage to minimize potential losses. Consequently, output fell and production costs only marginally recovered.

Burma's rice farmers plant over 200 rice varieties in three main categories: *Aemahta* (long grain), *Pawsan* (median and round), and *Ngasein* (low-quality short grain).

In the Ayeyarwady Region, which represents roughly 30 percent of Burma's rice acreage, the price for MY 2025/26 export-oriented, main crop, long-grain *Aemahta* variety declined 20-25 percent. Some farmers in Pyarpon, Bogalay, and Ngapudaw townships shifted to glutinous rice production in the subsequent second crop season with anticipation of favorable prices.

In MY 2025/26, Burma's rice production marginally increased despite a contraction in harvested area as the average yield per acre increased. Favorable weather conditions and the absence of severe flooding during the main crop season, particularly in Yangon Region, Bago Region, and Rakhine State, underpinned the yield increase. According to industry contacts, the main rice crop yield typically ranges from 50-65 baskets (1 basket = 46 pounds) per acre (2.6-3.37 MT/Ha) for the medium-grain *Pawsan*, which mostly supplies the domestic market. The average main rice crop yield for *Aemahta* varies significantly between 60-140 baskets per acre (3.1-7.5 MT/Ha).

The Department of Agriculture (DOA) rice yield target is 100 baskets per acre (5 MT/Ha) for main paddy and 110 baskets per acre (5.67 MT/Ha) for second season paddy, but the actual average yields are far below these targets (e.g., 50-53 baskets per acre or 2.6-2.7 MT/Ha for main season crop) due to insufficient access to inputs, technologies, and other limitations.

Figures 1.1 Burma: Crop Calendar in Central (a) and Lower (b) Areas

Rice based Crop calendar and cropping pattern in Central Myanmar
(Mandalay, Sagaing and Magwe)

Rice based Crop calendar and cropping pattern in Lower Myanmar
(Yangon, Bago, Ayeyarwady, Mon)

ource: DOA and Post's crop surveys

1.2 Consumption

Post forecasts a slight decrease in domestic rice consumption in MY 2026/27 compared to MY 2025/26 due to falling per capita income, continuing migration within and emigration from conflict areas in Burma, increasing urbanization, a growing preference for wheat-based (e.g., instant noodles and bread) and other alternative foods, as well as greater health consciousness around food consumption. According to the IMF, Burma's GDP per capita declined 2.2 percent in 2025. The UN High Commissioner for Refugees (UNHCR) reported close to 10 million people moved internally or out of Burma as of August 2025.

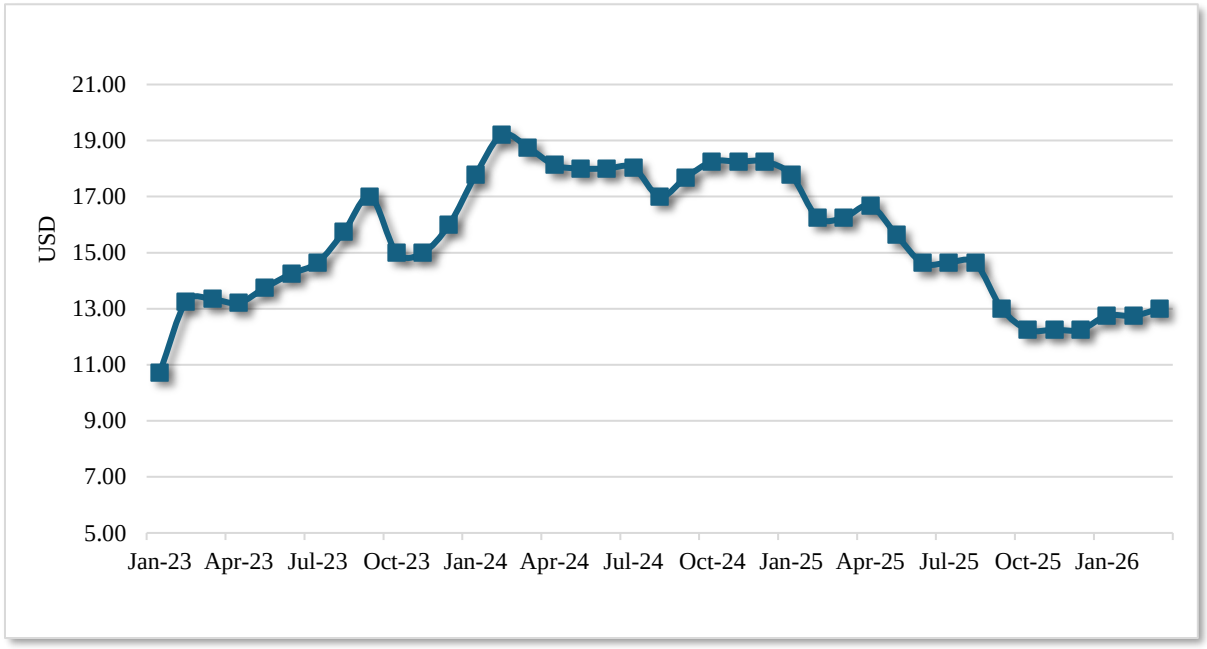
Following its latest survey in 2012, Burma's Central Statistical Organization (CSO) in the Ministry of Planning and Finance estimated per capita rice consumption in Burma at about 160-170 kilograms per person per year based on household consumption surveys. Approximately 70 percent of Burma's population lives in rural areas, where the average annual rice consumption is about 170 kilograms per person. The remaining population concentrated in urban areas consumes around 145 kilograms of rice per capita per year. Myanmar Rice Federation's 2016/17 surveys identified Burma as among the highest rice-consuming countries in the world, with average per capita consumption estimated at 155–170 kg per year.

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 seven percent of total domestic rice production. Most Burmese consumers prefer high quality *Aemahta*. Food manufacturers mainly use *Ngasein* rice and broken rice to make noodles and traditional rice snacks.

Broken rice, along with yellow corn, is a key source of starch and energy in animal feed in Burma and market prices determine its usage level. Broken rice can account for around 15-20 percent of the animal feed depending on the formulation. Smaller livestock producers, including backyard farms, are the primary consumers of broken rice for feed. According to industry sources, the livestock sector uses about 150,000-250,000 MT of broken rice per year. Burma also uses broken rice to make traditional snacks, noodles, and spirits.

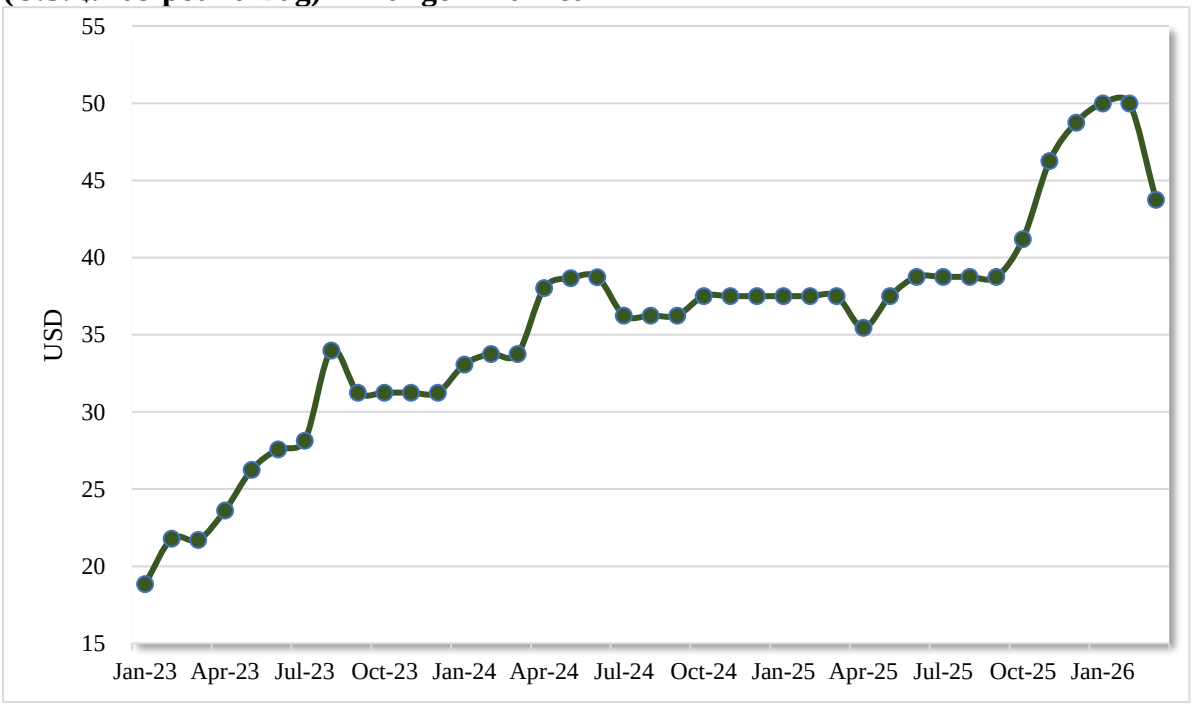
Due to declining global rice prices in MY 2024/25, domestic prices for export-quality paddy fell. In January 2026, farmer contacts reported that the price for rough rice (*Aemahta*) declined 20-30 percent compared to the same period the year before due to poor global prices (see Figure 1.2). At the same time, Post's contacts reported that the price for premium Shwe Bo *Pawsan* paddy rice varieties (mainly consumed domestically) increased 50-60 percent due to low production and difficulty in transportation from Sagaing, the conflict-affected major planting area.

Figure 1.2. Burma: Average Monthly Prices for Aemahta 25 Percent Broken (low grade) Rice (U.S. $/108-pound Bag) in Yangon Market



Source: MRF

Figure 1.3. Burma: Average Monthly Domestic Wholesale Prices for Shwe Bo Pawsan Rice (U.S. $/108-pound Bag) in Yangon Market



Source: MRF

1.3 Trade

Post forecasts Burma's MY 2026/27 rice exports to stay flat compared to MY 2025/26 levels, which will be 14 percent below MY 2024/25 exports. The estimated drop in MY 2025/26 rice exports reflects weak international demand along with a combination of reduced supply and rising transportation costs. The ongoing Middle East conflict has pushed up global fuel prices, increasing the cost of rice harvesting, milling, and shipping. These higher logistical and processing costs, along with product quality issues, are reducing Burma's competitiveness in global markets. At the same time, Post forecasts a smaller exportable rice supply in MY 2026/27 due to lower domestic rice production as described above.

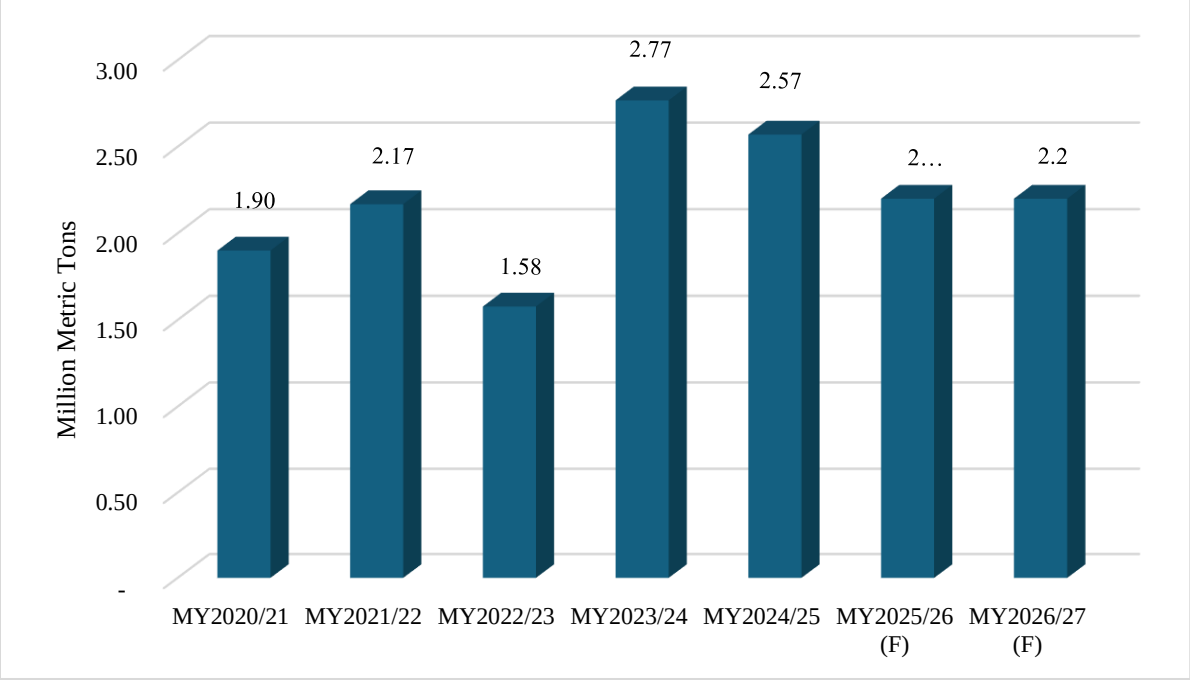
In MY 2024/25, Burma exported most of its rice and broken rice by maritime transport, with only about 1 percent delivered through border trade. That year, Burma exported 1.4 MMT of head rice primarily to China, the Philippines, Indonesia, Madagascar and the EU. In MY 2024/25, China, Belgium, the Netherlands, Indonesia and the United Kingdom were the major buyers of Burma's 1.2 MMT of broken rice exports.

Table 1.2. Burma: Rice Import Tariffs

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

Source: Myanmar Customs Department

Figure 1.4. Burma: Rice Exports by Marketing Year (MMT)



Sources: Ministry of Commerce, MRF

1.4 Policy

Every October, the Department of Consumer Affairs (DOCA), under the Ministry of Commerce, issues monthly floor market prices for all paddy rice varieties through the Myanmar Rice Federation (MRF). The MRF encourages affiliated associations, commodity depots, exporters, and rice companies to adhere to the monthly reference prices. Guidance from DOCA stipulates the domestic sale price should not exceed 8 percent above the reasonable market prices. DOCA issues separate prices for rice sold in consumer packaging at mini-marts, supermarkets, and other brick and mortar retail outlets. However, small and medium rice retailers do not adhere to the prescribed price; instead, they add to their margin to address their established purchasing and operating costs.

In October 2025, MRF announced the paddy price at 1,150,000 kyats per 100 baskets ($ 143/MT) or 21 percent above its October 2024 paddy reference price.

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 (see Table 1.3). The loan amount varies depending on the commodity and season. For rice farmers, MADB offers credit of up to 150,000 MMK ($37.5) 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, especially large-scale farmers cultivating more than 10 acres, must seek additional loans from private lenders.

Table 1.3. Burma: 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.

In August 2025, MOALI announced a Rice Export Zones initiative to boost rice exports by strengthening farmers' production capacity and fostering systematic cooperation between farmers and exporters in rice cultivation and production. The initiative targets 100 townships, with over 50 exporting companies managing approximately 300,000 acres (121,457 Ha), but the timeline for full implementation remains unclear. Each Rice Export Zone covers at least 300 acres (121.45 Ha) and is limited to no more than three export rice varieties. The initiative emphasizes the use of organic and natural fertilizers, achieving targeted paddy yields, and implementing contract farming arrangements between farmers and exporters for a minimum of three consecutive seasons. To promote efficient production and streamlined export management, MOALI has set a benchmark of four tons of rice or broken rice exported per each acre. Under the Rice Export Zone program, farmers receive interest-free loans of approximately 250,000 MMK ($62.5) per acre from the National Economic Development Fund for one crop season. Export companies contribute an additional 200,000 MMK ($50) per acre, resulting in a total of roughly 450,000 MMK ($112.5) per acre to cover production costs. Farmers typically repay these loans at harvest by selling their crops at prevailing market prices.

In certain zones, agribusiness groups such as Myanmar Agribusiness Public Cooperation

(MAPCO) provide direct support of 450,000 MMK ($112.5) per acre, along with fertilizers and planting equipment, including seeders, to assist farmers participating in the Rice Export Zones. The Burmese regime requires rice exporters to obtain export licenses to export rice and broken rice. The Central Bank of Myanmar issued Notification No. 2/2026 on January 7, 2026, reducing the mandatory conversion of export earnings from 25 percent to 15 percent. The regulation took effect retroactively from January 1, 2026. Under this rule, exporters must convert 15 percent of their foreign currency export earnings into MMK at the official reference rate of 2,100 MMK per U.S. dollar, while the remaining 85 percent can be retained or exchanged at the market trading rate through authorized banks. This change gives Burma exporters more flexibility in managing their earnings.

1.5 Stocks

There are no official reports of stock levels. Post estimates higher stocks in MY 2025/26 due to lower exports and reduced domestic consumption. For MY 2026/27, ending stocks will fall as Burma will aim to maintain steady exports despite declining production.

2. Corn
2.1 Production

Table 2.1. Burma: Corn Production, Supply, and Distribution

Corn	2024/2025		2025/2026		2026/2027	
Market Year Begins	Oct 2024		Oct 2025		Oct 2026	
Burma (Myanmar)	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	680	680	680	660	0	640
Beginning Stocks (1000 MT)	184	184	144	584	0	774
Production (1000 MT)	2900	2800	3000	2700	0	2450
MY Imports (1000 MT)	10	10	10	10	0	10
TY Imports (1000 MT)	10	10	10	10	0	10
Total Supply (1000 MT)	3094	2994	3154	3294	0	3234
MY Exports (1000 MT)	2400	1750	2700	1900	0	2000
TY Exports (1000 MT)	2400	1750	2700	1900	0	2000
Feed and Residual (1000 MT)	500	600	200	550	0	530
FSI Consumption (1000 MT)	50	60	50	70	0	0
Total Consumption (1000 MT)	550	660	250	620	0	530
Ending Stocks (1000 MT)	144	584	204	774	0	704
Total Distribution (1000 MT)	3094	2994	3154	3294	0	3234
Yield (MT/HA)	4.2647	4.1176	4.4118	4.0909	0	3.8281

(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 2026/2027 = October 2026 -

September 2027
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.

Post forecasts a decrease in Burma's MY 2026/27 corn planted area and production compared to MY 2025/26 as farmers continue to face high fuel costs and fertilizer shortages. Post revised MY 2025/26 harvested area and production due to a reduction in cultivated area in response to high production costs and unfavorable weather during the main corn crop cultivation season (June-August). In southern Shan State, which represents over 65 percent of Burma's corn production, excessive rainfall and rising input costs for corn seed and chemical fertilizer have led to reduced hybrid corn cultivation during the main monsoon season (mid-May through August). The price of preferred corn seed varieties (CP-808, NK-625) during the MY 2025/26 planting season nearly doubled to 130,000-160,000 MMK ($32.5-40) /5kg compared to the previous year.

Due to higher seed costs, industry contacts reported that some corn farmers in southern Shan State chose a cheaper corn seed variety like GT-029, which cost 80,000 MMK ($20)/5kg bag, in MY 2025/26, and had a lower yield. Counterfeit or low-quality corn seed also contributed to lower yields in MY 2025/26. The regime's stringent import licensing requirements delayed timely imports of quality seeds and some traders sold inferior or old seeds in repackaged bags, which led to poor germination and low yield.

In Ayeyarwady (Lower Delta) Region, which represents about 5 percent of Burma's corn production, many corn farmers have switched to soybean and pepper cultivation, as these crops offer better profitability due to lower input requirements and attractive prices. In MY 2025/26, the Ayeyarwady regional government aimed to have 100,000 acres of soybeans in the region to supply local edible oil and feed demand.

2.2 Feed Consumption

Post forecasts decreased domestic feed consumption in MY 2026/27 due to a poor outlook for the livestock sector which faces multiple operational challenges in Burma (see 2025 Burma Future Prospects and Market Snapshot for Livestock Industry report). Recent fuel shortages and scheduled power cuts will negatively affect the development of Burma's livestock industry. Burma's livestock sector relies heavily on imported raw feed materials, additives, and veterinary medicines, and is vulnerable to imported input cost fluctuations. Additionally, in some conflict-affected areas, farmers feed either pure corn or pure broken rice due to high costs and delivery challenges associated with compound feed.

2.3 Trade

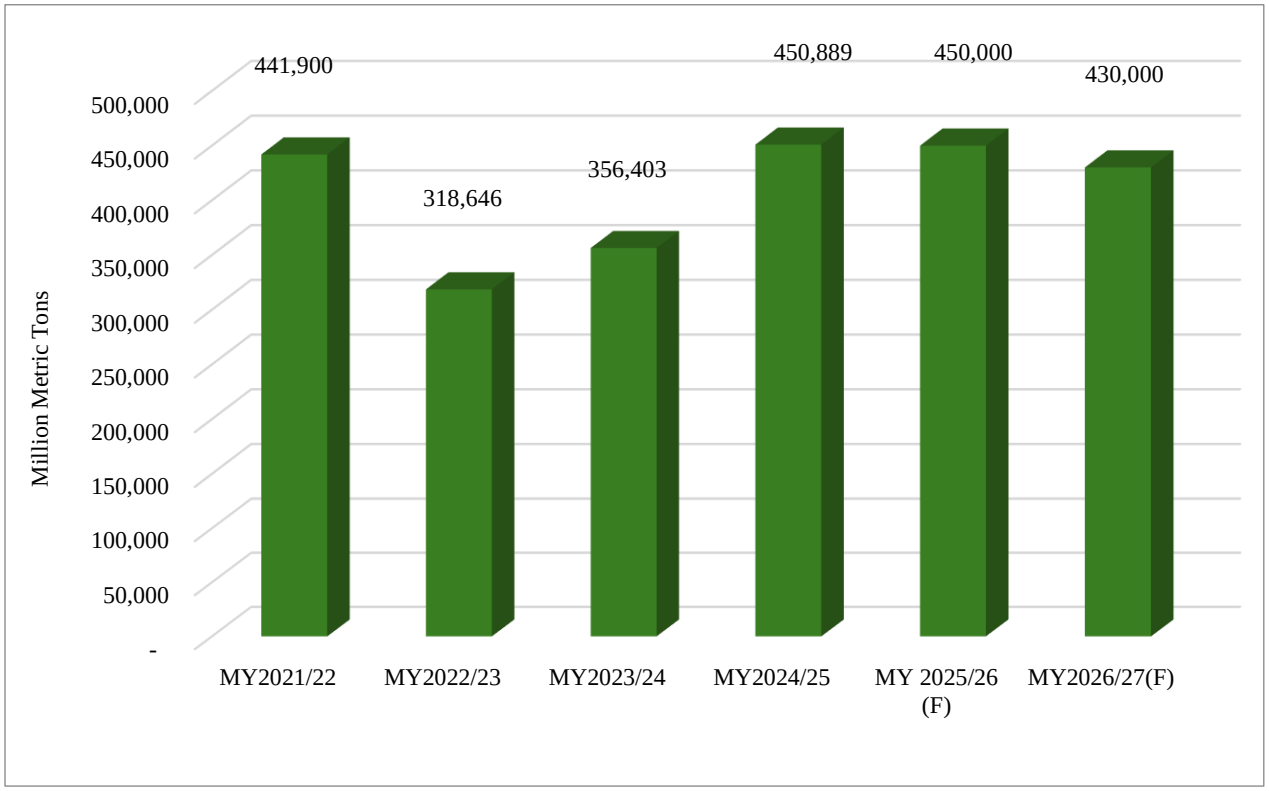
Post forecasts Burma's corn exports to gradually increase in MY 2025/26 and MY 2026/27 in response to growing corn demand from China, offsetting lower demand from Thailand. Burma has a comparative logistical advantage to supply neighboring China. In early 2026, Myanmar Corn Industrial Association (MCIA) reported that Thailand reduced its duty-free corn import period for ASEAN countries from seven months (February 1 to August 31) to five (February-

June). This may lead to lower corn exports to Thailand in the coming years. Still, Burma's regime recently announced reopening of Burma-Thailand border checkpoints (Myawaddy-Mae Sot border crossing) from April 2, 2026. This development should facilitate smoother corn exports, especially from Kayin, Mon, and Shan states, in MY 2025/26.

Post revised MY 2024/25 corn export levels to reflect slower demand from the main buyers and available data. In MY 2024/25, the Philippines shifted its corn purchases to Brazil and Vietnam. India increased its domestic corn production and reduced its import demand. According to contacts, officials closed the Myawaddy-Mae Sot border crossing, previously one of the busiest on the Thai-Burmese border, in mid-August 2025 to strengthen control over border trade, and reportedly to reduce revenue going to armed groups and illicit networks. Then, the regime launched a new container maritime shipping route between Yangon, Kawthoung, and Ranong.

Export demand and global market conditions drive Burma's corn prices, which usually increase in January and February, driven by stockpiling for exports to Thailand during Thailand's tariff-free corn import window for ASEAN members. Burma's corn prices drop in August when Thailand's tariff-free import window closes. Domestic corn prices continue to fall in October and November 2025 as new crop corn enters the market.

Figure 2.1 Burma: Marketing Year Corn Exports (MT)



Source: TDM

Figure 2.2. Burma: Monthly Domestic Wholesale Prices ($/MT) for Yellow Corn at Yangon Market

Source: Daily prices: http://market.doca.gov.mm/:
Myanmar Corn Industrial Association

Table 2.2. Burma: Corn Import Tariff

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

Source: Myanmar Customs Department

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 SPS protocol requirements negotiated with China. As of early 2025, there were 133 warehouses and 59 dryers between 112 companies that were GACC-approved.

The Ministry of Commerce formed a government-private sector working group to register and manage the issuance of smoke-free (burn-free) certification in February 2026. This committee aims to help exporters efficiently export corn to Thailand.

3. Wheat
3.1 Production

Table 3.1. Burma: Wheat Production, Supply, and Distribution

Wheat	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jul 2024		Jul 2025		Jul 2026	
Burma (Myanmar)	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	50	50	50	50	0	50
Beginning Stocks (1000 MT)	85	85	105	90	0	90
Production (1000 MT)	70	70	70	70	0	70
MY Imports (1000 MT)	465	450	470	450	0	430
TY Imports (1000 MT)	465	450	470	450	0	430
Total Supply (1000 MT)	620	605	645	610	0	590
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)	515	515	540	520	0	500
Total Consumption (1000 MT)	515	515	540	520	0	500
Ending Stocks (1000 MT)	105	90	105	90	0	90
Total Distribution (1000 MT)	620	605	645	610	0	590
Yield (MT/HA)	1.4	1.4	1.4	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 2026/2027 = July 2026 - June 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: Post Calculation based on TDM data and interviews with industry sources.

Post forecasts flat wheat production in MY 2026/27 due to a lack of good quality seed, poor domestic prices, and high production costs. 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 2025/26. 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 was limited government interest in enhancing its production. However, due to current trade policy on limiting import, Burma is trying to encourage domestic wheat production by offering farm loans. Starting from the 2025 dry season, wheat farmers could receive loans of 150,000 MMK ($37.5) per acre or same basis as for major rice crops. However, expanding the planted area remains challenging. To expand wheat cultivation, farmers need good market prices, high-quality seeds, and clear information on the expected yields of different news varieties. In some areas of Shan State, farmers reportedly were not aware that MADB offered farm loans for wheat.

Wheat yield ranges between 1.2-1.7 MT/Ha. Some fields are far from water sources and require irrigation. Wheat farmers maintained a limited farming area in 2025 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.

3.2 Consumption

Post forecasts for declining wheat consumption in MY 2026/27 due to a combination of supply constraints and rising production costs. Burma wheat consumption heavily relies on imports and rising international freight costs lead to lower imports according to industry contacts. Frequent electricity outages continue to disrupt flour mill operations, leading to lower production of noodles, bread, and other wheat-based products. At the same time, fuel shortages and increased transportation costs are further raising domestic production expenses.

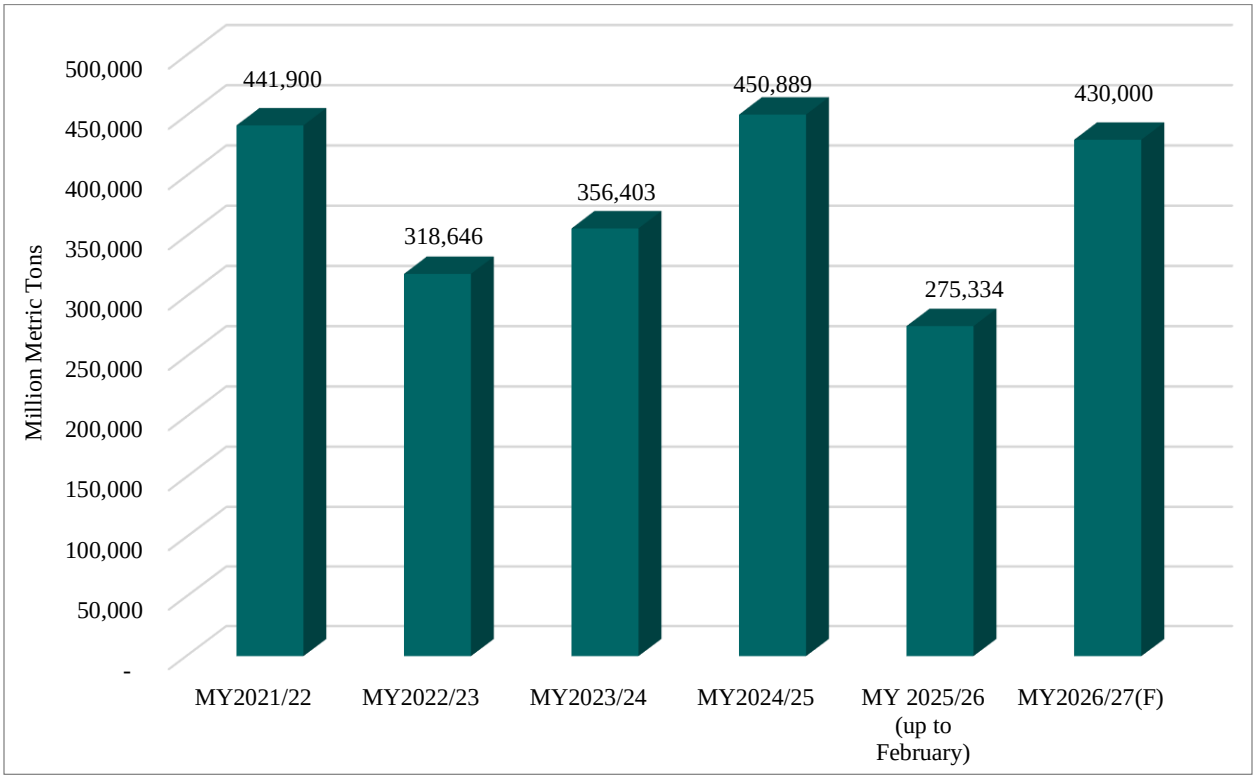
Burma's wheat consumption in MY 2025/26 increased due to significant developments pushing for expansion of the domestic food processing sector. In 2024, the government restricted the import of ready-to-eat food items, including cookies, cakes, instant noodles, and other wheat-based products. As a result, local food processors have expanded production and developed local brands. This shift toward local processing has contributed to higher demand for wheat. In addition, a bakery owner confirmed that wheat demand has increased due to the expanded distribution of wheat-based products with longer shelf life, such as dry noodles, instant noodles, and dry cakes and bread, biscuits, and cookies to remote areas, as these items are easy to store and transport. Consumers rely on general-purpose wheat for about 65 percent of their consumption, mainly for noodles, cookies, and cakes. They use about 25 percent for bread flour. Another 5 percent goes to wheat used in traditional breakfast foods, and the remaining 5 percent represents demand for premium cake flour (see Burma Wheat Consumption and market Update for more details).

3.3 Trade

Post forecasts Burma's wheat imports will decrease by 4.4 percent in MY 2026/27 compared to MY 2025/26 driven by high international freight costs. For the first eight months of MY 2025/26, Burma imported 275,334 MT of wheat, mainly from Australia, Thailand, Indonesia, and Malaysia. Currently there are only three major key wheat importers in Burma.

In MY 2024/25, Australia supplied more than 77 percent of Burma's total wheat grain imports. Australia's wheat exports benefit from zero duties under the ASEAN-Australia-New Zealand Free Trade Agreement in 2010. Wheat importers must obtain import licenses, which are subject to frequent changes in import/export policies. Importers report that it takes approximately 4-6 months to get the import license. An import license is valid for three months and an importer may apply for a two month extension and again for another month extension.

Figure 3.1. Burma: Wheat Imports (MT) by Year

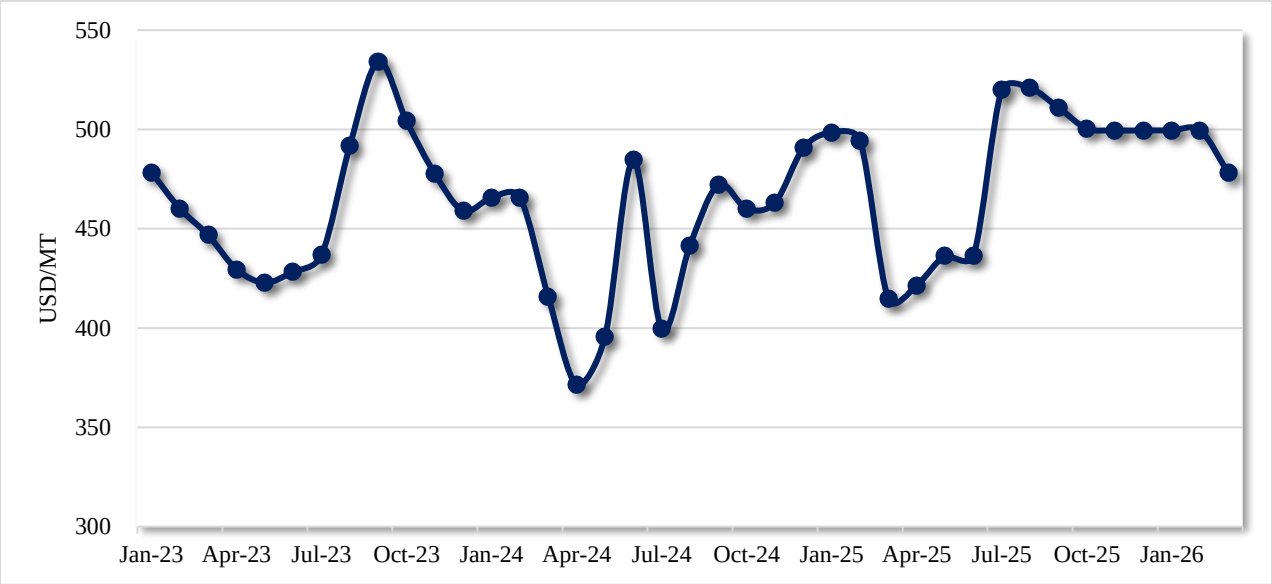


Source: TDM

3.4 Prices

Domestic wheat prices fluctuated at high levels in 2025 and flattened off from August to early 2026 with the arrival of imported wheat. In 2025, domestic wholesale prices for wheat remained strong due to active domestic demand from food processing sectors. Domestic wholesale prices for wheat usually increase between September and December due to reduced stocks. When import prices increase, domestic wheat prices tend to rise as well as Burma relies heavily on imports. When import prices fall, domestic prices may decline, but often more slowly according to the demand from the mills in Mandalay, Sagaing, and Shan State since they primarily use local wheat. Prices for imported wheat are usually higher than locally produced wheat due to high and consistent quality attributes.

Figure 3.2. Burma: Average Domestic Price for Wheat in Mandalay Market (U.S. $ /MT)



Source: Commodity Exchange Center Mandalay

3.5 Policy

According to industry contacts, the military regime is attempting to reduce "non-essential" imports to conserve foreign currency and reduce the general 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.

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. Burma's import tariffs for wheat grain and flour are 5 percent and 10 percent, respectively at the Most Favored Nation rate.

Attachments:

No Attachments