



Food and Agriculture
Organization of the
United Nations



World Food
Programme

MYANMAR

Shocks, agricultural livelihoods and food security

Monitoring report
June 2022



MYANMAR

Shocks, agricultural livelihoods and food security

Monitoring report
June 2022

REQUIRED CITATION

FAO and WFP. 2022. *Myanmar | Shocks, agricultural livelihoods and food security. Monitoring report, June 2022.* Rome. <https://doi.org/10.4060/cc0562en>

The designations employed and the presentation of material in this information product do not imply the expression of any opinion whatsoever on the part of the Food and Agriculture Organization of the United Nations (FAO) or World Food Programme (WFP) concerning the legal or development status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries. Dashed lines on maps represent approximate border lines for which there may not yet be full agreement. The mention of specific companies or products of manufacturers, whether or not these have been patented, does not imply that these have been endorsed or recommended by FAO or WFP in preference to others of a similar nature that are not mentioned

The views expressed in this information product are those of the author(s) and do not necessarily reflect the views or policies of FAO or WFP.

ISBN 978-92-5-136425-3 (FAO)

© FAO and WFP, 2022



Some rights reserved. This work is made available under the Creative Commons Attribution-NonCommercial-ShareAlike 3.0 IGO licence (CC BY-NC-SA 3.0 IGO; <https://creativecommons.org/licenses/by-nc-sa/3.0/igo/legalcode>).

Under the terms of this licence, this work may be copied, redistributed and adapted for non-commercial purposes, provided that the work is appropriately cited. In any use of this work, there should be no suggestion that FAO endorses any specific organization, products or services. The use of the FAO logo is not permitted. If the work is adapted, then it must be licensed under the same or equivalent Creative Commons licence. If a translation of this work is created, it must include the following disclaimer along with the required citation: “This translation was not created by the Food and Agriculture Organization of the United Nations (FAO). FAO is not responsible for the content or accuracy of this translation. The original English edition shall be the authoritative edition.”

Disputes arising under the licence that cannot be settled amicably will be resolved by mediation and arbitration as described in Article 8 of the licence except as otherwise provided herein. The applicable mediation rules will be the mediation rules of the World Intellectual Property Organization <http://www.wipo.int/amc/en/mediation/rules> and any arbitration will be conducted in accordance with the Arbitration Rules of the United Nations Commission on International Trade Law (UNCITRAL).

Third-party materials. Users wishing to reuse material from this work that is attributed to a third party, such as tables, figures or images, are responsible for determining whether permission is needed for that reuse and for obtaining permission from the copyright holder. The risk of claims resulting from infringement of any third-party-owned component in the work rests solely with the user.

Sales, rights and licensing. FAO information products are available on the FAO website (www.fao.org/publications) and can be purchased through publications-sales@fao.org. Requests for commercial use should be submitted via: www.fao.org/contact-us/licence-request. Queries regarding rights and licensing should be submitted to: copyright@fao.org.

Cover photograph: ©FAO/Ko ChanAyeNaing

Contents

Abbreviations and acronyms	vii
Key highlights	viii
Methodology.....	1
Shocks and risk factors in the country.....	4
Agricultural production.....	7
Crops	8
Livestock.....	15
Food supply and markets.....	18
Livelihoods, incomes and coping strategies	23
Livelihoods and income sources.....	23
Shocks	24
Livelihood coping strategies	31
Food security.....	33
Most affected population groups and needs	38
Conclusion	40
Recommendations.....	41
References	42

Figures

Figure 1. FAO-WFP assessment area, Round 1 (left), Round 2 (right)	2
Figure 2. Distribution of events across the country from January 2020 to December 2021 (passive and violent confrontation)	5
Figure 3. Daily new COVID-19 cases.....	5
Figure 4. Myanmar crop calendar	7
Figure 5. Comparison of area planted in 2021 compared to a typical year by location	8
Figure 6. Proportion of households with a reduction in planted area in 2021 compared to a typical year by land size and main crop	9
Figure 7. Estimated harvest in monsoon season compared to a typical year by location.....	10
Figure 8. Changes in planted area and expected harvest compared to a typical year by type of crop	11
Figure 9. Difficulties among crop producers faced in the three months preceding the survey.....	12
Figure 10. Main difficulties reported by households by crop type	12
Figure 11. Accessibility to agricultural inputs reported by households by location	13
Figure 12. Percentage of households with decreased livestock numbers compared to last year by location	15
Figure 13. Percentage of household reported reasons for the decrease in livestock by rural, urban and herd species	16
Figure 14. Percentage of respondents reporting difficulty in livestock production over the three months prior to the interview	17
Figure 15. Crop and livestock production difficulties affected by the current political instability by location	17
Figure 16. Percentage of agricultural households that faced difficulties selling products in the three months preceding the survey by location.....	18
Figure 17. Marketing difficulties faced by crop producers in the three months preceding the interview.....	19
Figure 18. Difficulties in marketing by type of crop.....	19
Figure 19. Change in selling price of crops by location	20
Figure 20. Difficulties faced by geographical distribution and type of livestock production....	21
Figure 21. Livestock producers reported change in selling price by location	22
Figure 22. Changes in customers and selling volumes in the month preceding the survey (left), and the reported reasons for the reduction in volume purchased (right).....	22
Figure 23. Percentage of households by main income-generating activities by location	24

Figure 24. Percentage of households experiencing any shock in the three months preceding the interviews	25
Figure 25. Shock experienced by households in the three months preceding the interviews by rural/urban and agricultural/non-agricultural households.....	26
Figure 26. Shock experienced by households in the three months preceding the interviews by key household characteristics	27
Figure 27. Shock experienced by households in the three months preceding the interviews by location	28
Figure 28. Percentage of households that experienced reduced income in the three months preceding the interviews compared to the same period over the last five years	29
Figure 29. Income losses attributed to COVID-19 restrictions and reported economic shocks (lost job/cannot conduct business) by main crop, main livestock and main activity.....	30
Figure 30. Livelihood-based coping strategies index by location.....	31
Figure 31. Livelihood coping classifications by key characteristics	32
Figure 32. Percentage of household food consumption by location	33
Figure 33. Percentage of household food consumption by key household characteristics	36
Figure 34. Percentage of female- vs. male-headed households in rural vs. urban areas by food consumption	36
Figure 35. Percentage of households with no access to markets by location	37
Figure 36. Comparison of food security indicators by location.....	38
Figure 37. Proportion of households that received assistance in the three months preceding the survey, and the proportion of households that reported a need for assistance in the subsequent three to six months by location and rural/urban.....	39
Figure 38. Problem model.....	40

Tables

Table 1. Sample distribution and proportion of agricultural households by location	2
Table 2. Recent food insecurity as measured by the food insecurity experience scale (in percentage; standard deviations between parenthesis).....	34

Abbreviations and acronyms

ACLED	Armed Conflict Location and Event Data Project
ADB	Asian Development Bank
CATI	Computer-assisted telephone interviews
FAO	Food and Agriculture Organization of the United Nations
FCS	Food consumption score
FIES	Food insecurity experience scale
GDP	Gross domestic product
GIEWS	Global Information and Early Warning System on Food and Agriculture
IDP	Internally displaced person
IFPRI	International Food Policy Research Institute
IMF	International Monetary Fund
MLIP	Ministry of Labour, Immigration and Population
MoHS	Ministry of Health and Sports
OCHA	United Nations Office for the Coordination of Humanitarian Affairs
UNDP	United Nations Development Programme
UNFPA	United Nations Population Fund
USAID	United States Agency for International Development
WFP	World Food Programme

Key highlights

- > Fifty-six percent of respondent households reported the effects of shocks in the three months before the survey. The majority were economic in nature, such as loss of employment, fuel and food price increases, and the inability to conduct business. Overall, 18 percent of households reported no income, and 5 percent reported remittances or assistance as their primary income source. Of those with an income, two-thirds experienced a decrease in their primary income source compared to the same period in a typical year.
- > Farmers faced challenges in crop production, particularly paddy producers, and farmers in Kayah and Rakhine, due to difficulties accessing agricultural inputs, especially fertilizers. Nearly half of the interviewed farmers reported a reduction in the area planted resulting in a decrease in production. Forty-four percent indicated that they expect a lower harvest this monsoon season compared to a typical year.
- > Both crop and livestock producers faced difficulties in marketing their products due to atypically low farm-gate prices, no access to usual traders, and losses due to delays or the inability to access markets.
- > Despite low farm-gate prices, retail prices increased substantially – the rise in food prices was among the most frequently cited shocks. This, together with the high cost of transport and the disruptions of both input and output supply chains, indicates that the markets were not working as expected.
- > In the context of food price inflation, food consumers and producers saw their income decrease and their capacity to meet food and other basic needs reduced. Net consumers in urban areas were particularly affected by trade deterioration such as a decrease in income and increasing food prices resulting in asset depletion and food consumption gaps.

- > Eighty-nine percent of households adopted at least one coping mechanism. While 34 percent of households employed less severe coping mechanisms such as borrowing money or spending savings (which will affect their capacity to face future shocks), more than half of the households adopted coping mechanisms that depleted their livelihood assets and will be more difficult to reverse such as selling productive assets, decreasing health expenditures and engaging in risky activities.
- > Not only financial access, but physical access to markets and shops are of concern, particularly in Chin where 22 percent of households reported not being able to access a shop/market to buy food. Challenges accessing markets were also reported in Kayah (by 13 percent of the households), and in Kayin and Shan (11 percent).
- > Overall, 20 percent of households were found to have inadequate food consumption, and the extent of severe and moderate food insecurity was assessed by the food insecurity experience scale (FIES) at 27.5 percent (± 3.3), in the nine surveyed states and regions.
- > The different indicators used to assess food insecurity (Food Consumption Score, FIES and Livelihood Coping Strategy Index) consistently identified Chin, Kayah, Rakhine and, to a lesser extent, Shan, as the areas with the highest prevalence of food insecurity.

Methodology

This study represents a joint effort by the Food and Agriculture Organization of the United Nations (FAO) and the United Nations World Food Programme (WFP) to monitor the food security and livelihoods of all actors in key agricultural, livestock and fisheries value chains in high priority food crisis countries, with a focus on producers. FAO's contribution was made possible by financial support from the United States Agency for International Development (USAID) for the establishment of a data and analysis facility in the context of COVID-19 and other shocks such as political instability. WFP's contribution to the survey was also possible through financial support from USAID.

Within the monitoring system, data is collected every three months, mainly through computer-assisted telephone interviews (CATI). At the core of the data facility is a household survey which is statistically representative of the Admin 1 level (with a 95 percent confidence level and a 10 percent margin of error) and includes a representative quota of agricultural households. Information from household interviews is triangulated with information from key informants such as extension officers, food traders and agricultural inputs vendors, collected using closed-ended questions.

This assessment represents the second round (Round 2) of data collection, with data collected through CATI. The sample was stratified by state/region and households were selected using Random Digital Dialling. Round 2 was conducted between the second week of August and the first week of September 2021 and covered 147 townships in nine states or regions (Mon, Chin, Kachin, Kayin, Kayah, Rakhine, Shan,¹ Ayeyarwady and Yangon) as shown in Table 1 and Figure 1. By comparison, the first round (Round 1) was conducted between mid-August and mid-October 2020 and covered 75 townships in eight states or regions: Mon, Chin, Kachin, Kayin, Rakhine, Sagaing, Shan and Yangon (FAO and WFP, 2021). Round 2 analysis benefited from: interviews conducted with households (2 708),² food trader interviews (239) and input retailer interviews (108). The sample size and distribution of the household surveys by state are provided in Table 1.

¹ Shan South was excluded from the survey.

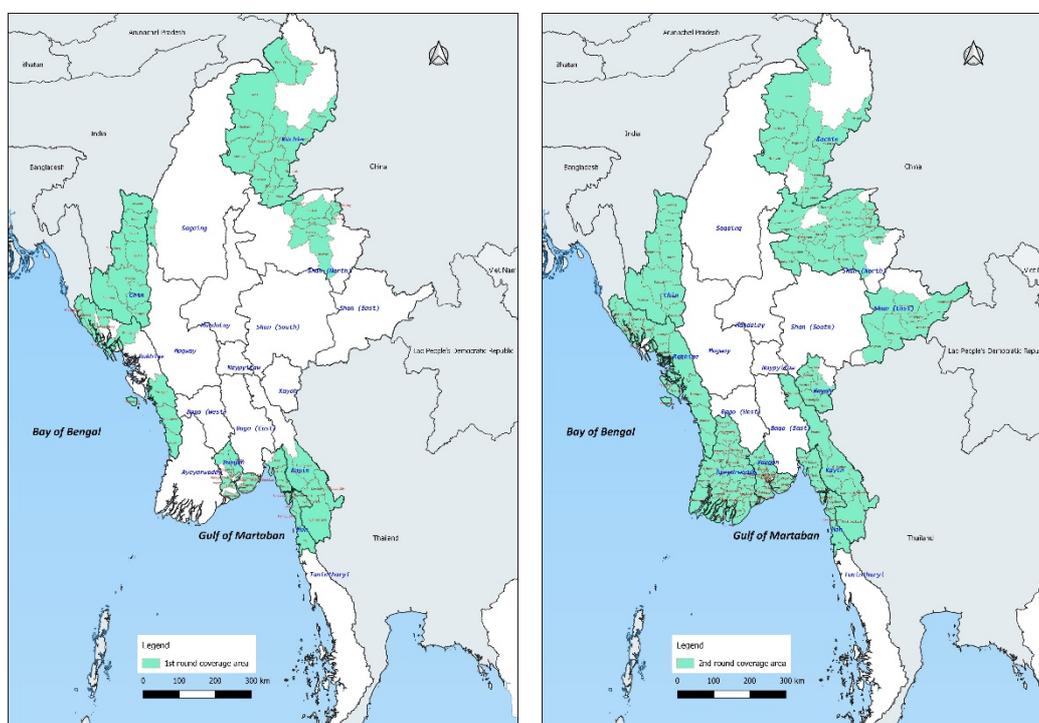
² The household sample was constituted by 259 respondents from FAO's beneficiaries list and 2 449 respondents reached by random digital dialling, similarly proportioned in rural and urban areas.

Table 1. Sample distribution and proportion of agricultural households by location³

State/region	Sample	Percentage of which engage in agriculture/livestock	Percentage of which live in rural areas
Ayeyarwady	323	74.6	81.1
Chin	249	65.9	47.4
Kachin	305	54.8	52.1
Kayah	269	57.6	38.3
Kayin	306	41.8	45.1
Mon	321	52.3	58.6
Rakhine	299	56.2	55.9
Shan	285	41.1	38.6
Yangon	351	31.6	33.0
Total	2 708	52.4	50.3

Source: FAO and WFP, 2021; FAO and WFP assessment results.

Figure 1. FAO-WFP assessment area, Round 1 (left), Round 2 (right)



Source of data: FAO and WFP, 2021; FAO and WFP assessment results.

³ Agricultural households are defined as engaging in the production of crops, livestock and livestock products, fishing and forest products, and include waged labourers. The definition is different from rural or urban, as the latter refers to an administrative division (ward or village).

The characteristics of the households surveyed were:

- Urban and rural: Fifty percent of the households were urban. The population in Myanmar is 70 percent rural (MLIP, 2017), therefore, the sample overrepresented the urban population.⁴
- Respondents: Of the total interviewed, 48 percent were female, and the average age of the respondent was 37 years old. The head of household was more often male (84 percent) than female (16 percent). In terms of education, the proportion of heads of household with no education or no completion of primary education, or with only Islamic education was 19 percent combined; 33 percent completed primary education; 32 percent completed middle secondary education; and 15 percent completed higher education.
- Household size: On average, each surveyed household had 5.1 members, in line with the national average of 5.1 (Central Statistical Organisation of Myanmar *et al.*, 2019). The average surveyed household size was slightly larger in rural areas (5.3) compared to urban areas (4.9).

The data were weighted by:

- the demographics by state/region;⁵
- the share of households in urban and rural settings;⁶ and
- the education of the heads of households, as a proxy for wealth (MoHS and ICF, 2017).

The survey was not nationally representative. Another potential limitation of this study stems from the bias of telephone-based surveying. It is possible that the sample excluded the poorest segments of the population, who do not typically own a telephone or live in remote areas with limited mobile network coverage. Due to the above-mentioned differences in geographical coverage and weighting, the results from Round 1 and Round 2 are not directly comparable.

⁴ The survey did not have national scope but included the predominantly urban region of Yangon.

⁵ United Nation's Office for the Coordination of Humanitarian Affairs' (OCHA) population estimates for 2021, based on 2014 census figures and 2019 inter-censal survey (United Nations Population Fund [UNFPA]).

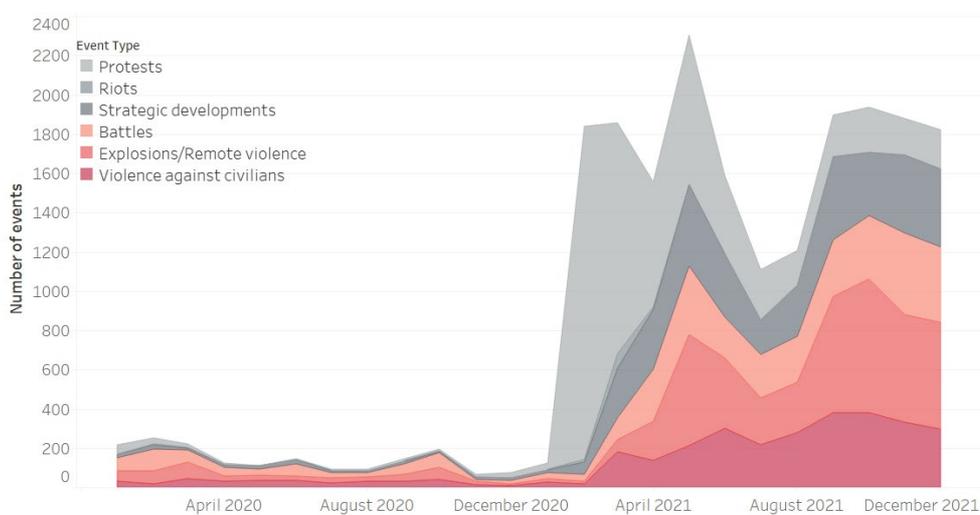
⁶ OCHA's population estimates for 2021, based on 2014 census figures and 2019 inter-censal survey (UNFPA).

Shocks and risk factors in the country

Before the pandemic and military takeover on 1 February 2021, Myanmar was one of the fastest growing economies in East Asia and Pacific, with an estimated and projected growth of 6.3 and 6.4 percent for 2019 and 2020, respectively (World Bank, 2021). Myanmar currently finds itself in the midst of several compounding crises that have destabilized the economy and caused uncertainty. Household incomes have been affected by both international factors (e.g. reduction in foreign investment) and domestic factors, such as political instability as a result of the civil disobedience movement and the military campaign against anti-coup opponents, and the economic impact of COVID-19 containment measures. Public and private sector services have been widely disrupted, including health care, education, and banking systems (World Bank, 2021). The value of the Myanmar Kyat has deteriorated (Trading Economics, 2021) causing the price of imported goods to rise, notably fuel, imported foods (such as palm oil), and production inputs (such as fertilizer). Myanmar's gross domestic product (GDP) is projected to contract by 17.9 percent in Fiscal Year 2021 (IMF, 2021) and Myanmar's inflation rate is forecasted at 6.2 percent in 2021 (ADB, 2021).

In the context of deteriorating economic conditions, the military takeover exacerbated violent conflict, particularly in Sagaing, Kachin, Chin, Shan, Kayah and Kayin. At the time of data collection (August/September 2021), the violence had displaced 208 000 households on top of 370 000 previously existing internally displaced people (IDP), affected livelihoods, and disrupted transportation routes impacting the flow of goods and food (UNHCR, 2021a). According to data made publicly available by the Armed Conflict Location and Event Data Project (ACLED, 2021), the incidence of conflict-related events increased from around 1 500 total recorded events (battles, explosions/remote violence, protests, riots, strategic developments, and violence against citizens) in 2020 to nearly 14 000 between January and September 2021. Violence against citizens increased nearly five-fold in 2021 compared to 2020 (Figure 2).

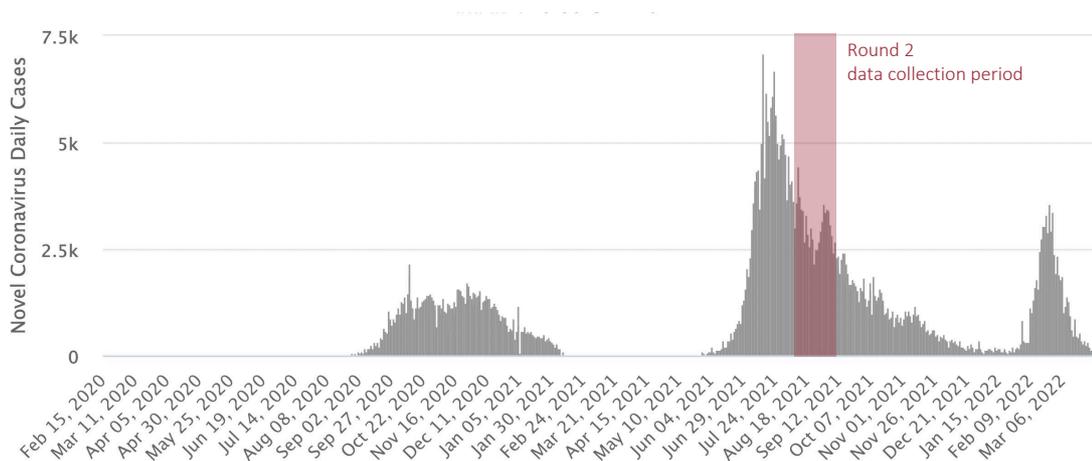
Figure 2. Distribution of events across the country from January 2020 to December 2021 (passive and violent confrontation)



Source: ACLED, 2021.

Within this context of political and economic instability, a third wave of COVID-19 hit the country and further undermined household livelihoods, income sources, access to markets and food, and overall well-being of families. As of 27 October 2021, there were 495 898 confirmed cases in Myanmar with 18 582 deaths and 460 224 in the process of recovery (Worldometer, 2021). The third wave of the pandemic started in mid-June and reached a total of 7 083 new daily cases in July (Figure 3). Since August 2021, the cases have decreased but there were still around 1 000 daily cases reported during the last week of October 2021.

Figure 3. Daily new COVID-19 cases



Source: FAO, 2022; Worldometer, 2022.

During the period of data collection, lockdowns and travel restrictions were implemented causing market closures or limitations, and further disrupted transportation routes contributing to rising prices for commodities. These price increases were much more than those observed after the COVID-19 surge in September 2020. After the increase in

cases marked by the third wave, Myanmar imposed stay-at-home orders to 11 townships in Chin and Shan states, and Sagaing region, and extended COVID-19 international entry restrictions (Crisis24, 2021).

Agricultural production

Although highly vulnerable to impacts from climate change (FAO and AVSI, 2019), the agriculture sector employs 56 percent of the labour force and is one of the major contributors to Myanmar's economy, accounting for 30 percent of Myanmar's GDP and 25 percent of the country's exports. The three main crop groups are paddy, beans and pulses, and oilseed crops.

The survey was undertaken in the middle of the monsoon season, during which time 80 percent of the annual rice supply is typically produced. Since the onset in May 2021, the monsoon season was characterized by average to above-average precipitation in the northern and southern production areas, benefitting planting activities and crop germination. By contrast, in central rice producing areas, including Magway, Mandalay and Sagaing regions and Shan State, below-average rainfall may have delayed planting operations and affected early crop development. Moisture deficits resulted in below-average vegetation conditions in June, raising concerns regarding crop yields (FAO, 2021). Adding to the previous year's production that was already below average, rice exports in the 2021 calendar year were forecasted at 2 million tonnes, 11 percent below the 2020 level, reflecting reduced exportable availabilities, and the disruption of international export services from 1 February 2021 (FAO, 2021). GDP related to the agriculture sector was projected to fall by 10.5 percent in fiscal year 2021 (World Bank, 2021).

Figure 4. Myanmar crop calendar

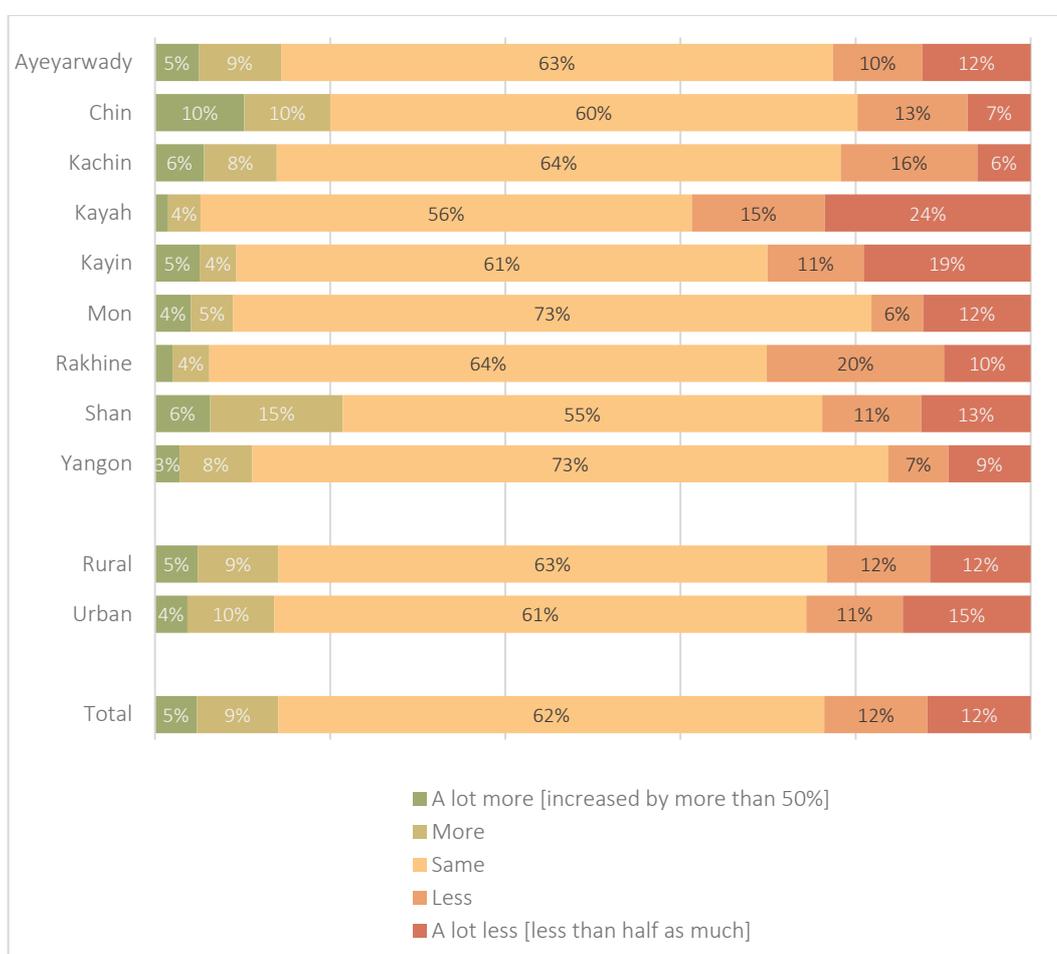


Source: FAO, 2021.

Crops

A total of 55 percent of crop producers reported paddy as their main crop followed by vegetables (10 percent), pulses (3 percent), maize (7 percent) and other crops (25 percent). Around one-quarter of farmers reported farming less or a lot less area compared to a typical year (Figure 5). The highest proportion of households reporting a reduction of planted areas was seen in Kayah, Kayin and Rakhine states. While data do not allow for establishing a cause-effect relationship, results are consistent with other sources that attribute this retrenchment of farmed area to delays in the rainy season in some areas (FAO, 2021), and the disruption of supply chain for agricultural inputs (International Food Policy Research Institute [IFPRI], 2021). Specifically, the data support an association between lack of fertilizer and the reduction in area planted.

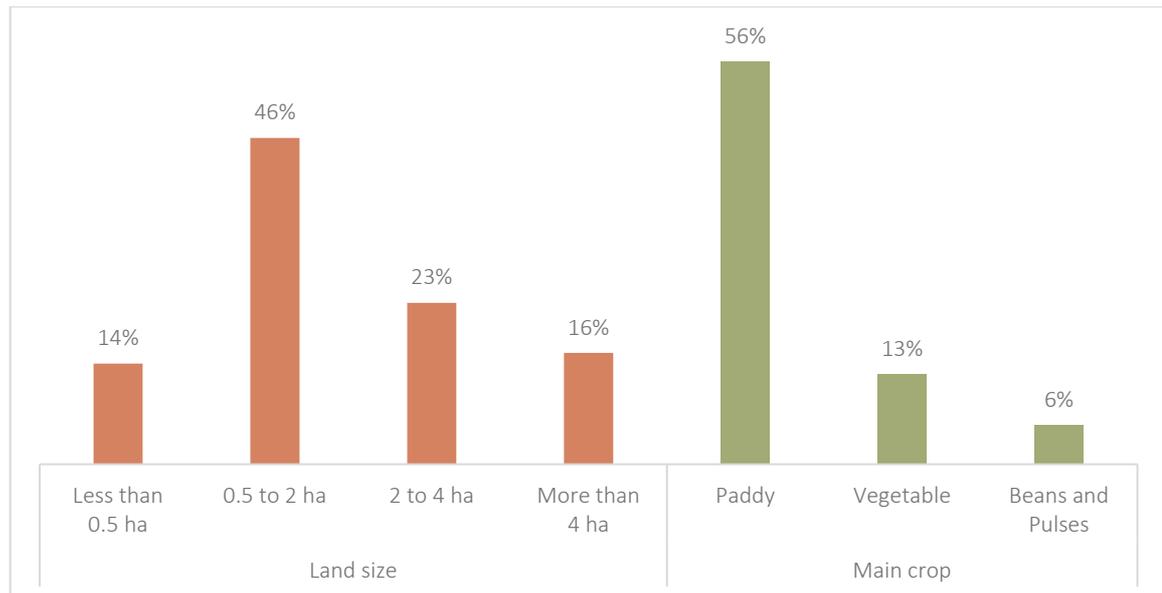
Figure 5. Comparison of area planted in 2021 compared to a typical year by location



Source: FAO and WFP, 2021; FAO and WFP assessment results.

The retrenchment of farmed area was most frequent among paddy farmers (56 percent), compared to other crops. It also affected more farmers with less than 2 ha of land – the majority – accounting for 48 percent of crop producers in the areas surveyed (Figure 6).

Figure 6. Proportion of households with a reduction in planted area in 2021 compared to a typical year by land size and main crop

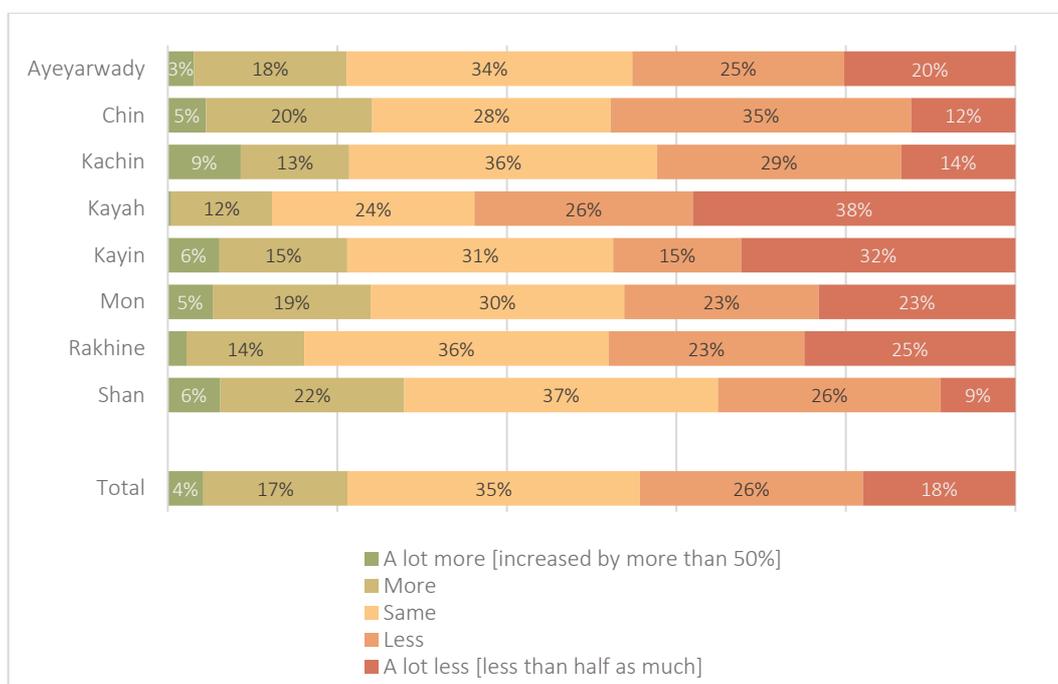


Source: FAO and WFP, 2021; FAO and WFP assessment results.

Forty-four percent of crop farmers estimated that production would be reduced (less or a lot less) compared to a typical year.⁷ The share was particularly high in Kayah, Chin, Rakhine and Yangon states (Figure 7).

⁷ In general, findings are consistent with FAO’s Global Information and Early Warning System (GIEWS), which reported that moisture deficits resulted in below-average vegetation conditions in June, raising concerns regarding crop yields (FAO, 2021). Moreover, this is also consistent with IFPRI (2021) indicating lower agricultural production than usual (40 percent of respondents).

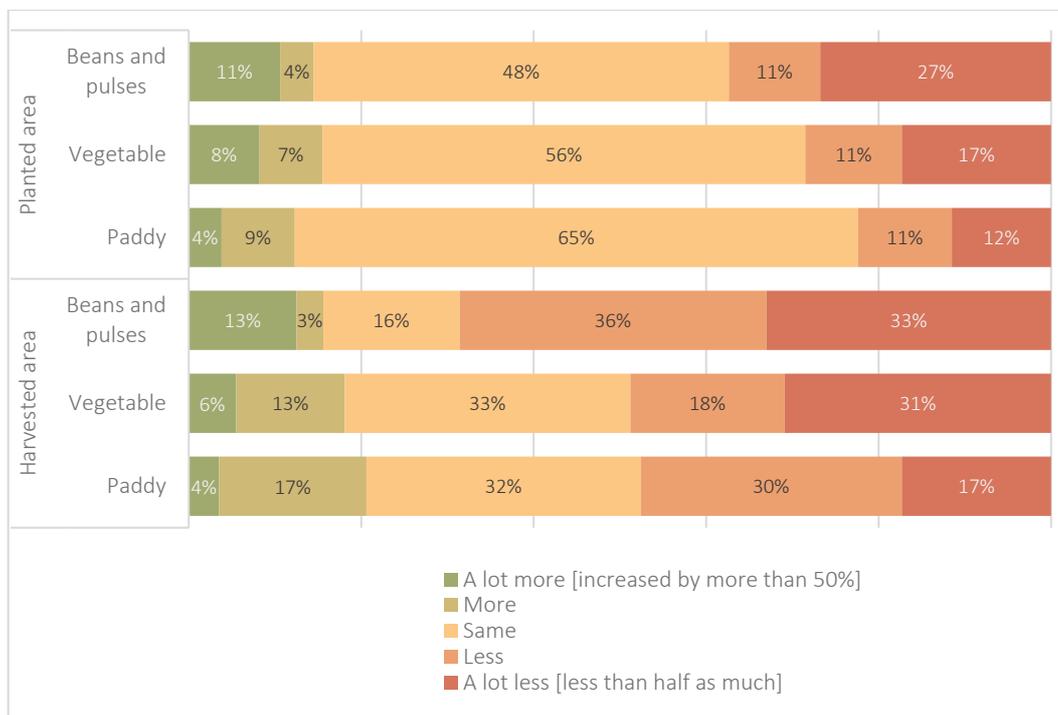
Figure 7. Estimated harvest in monsoon season compared to a typical year by location



Source: FAO and WFP, 2021; FAO and WFP assessment results.

Compared to a typical year, 13 percent of paddy crop farmers reported their planting area to be higher while 65 percent reported the same, and nearly one quarter (23 percent) mentioned a reduction (Figure 8). It is worth highlighting that 27 percent of pulse farmers reported their planting area reduced a lot (planting less than half as much), while 17 percent of vegetable producers planted more than 50 percent less area (Figure 8). The expected harvest during the monsoon season compared to a typical year was reported to be lower by 69 percent of producers of bean and pulses, 47 percent of paddy producers and 49 percent of vegetable producers.

Figure 8. Changes in planted area and expected harvest compared to a typical year by type of crop



Source: FAO and WFP, 2021; FAO and WFP assessment results.

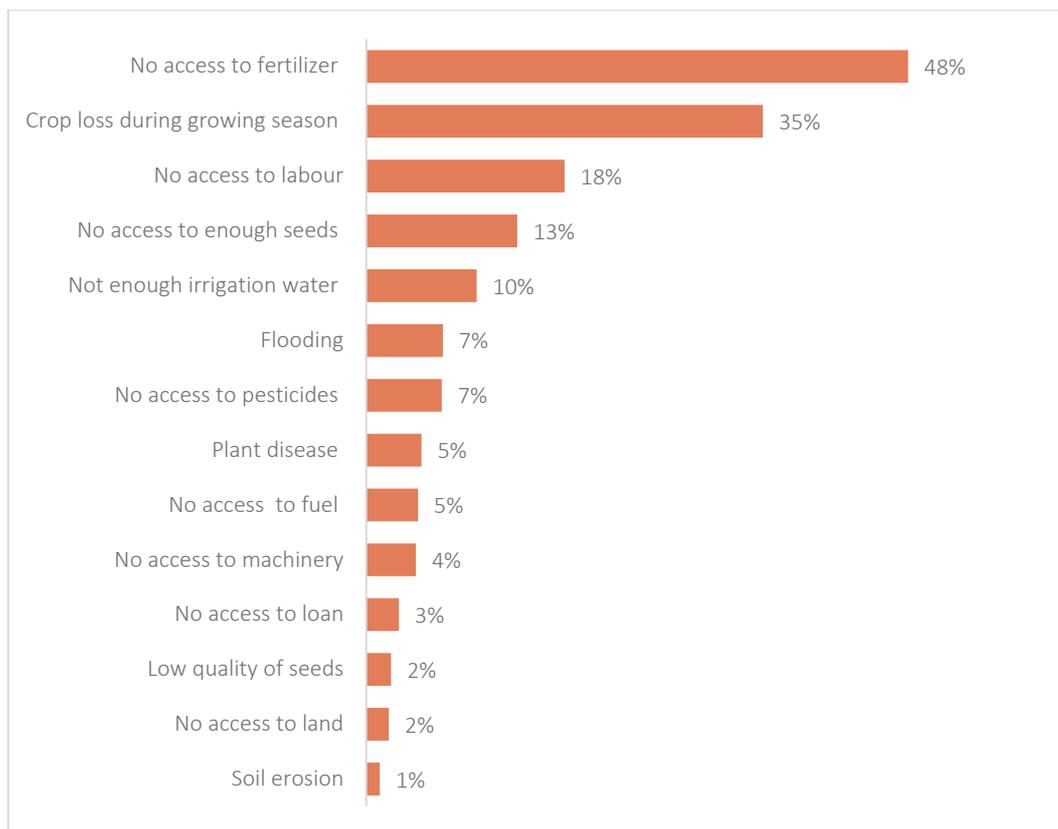
The major difficulties reported were access to fertilizer (48 percent), crop loss during the growing season (35 percent) and no access to labour (Figure 9).

In terms of crops, households that expected a decrease in production experienced different difficulties depending on whether they grew rice as their main crop or not. Access to fertilizer was the main challenge for paddy producers, while vegetable and pulse farmers declared the loss of their crop season (due to pests, disasters, or other plant disease) more frequently (Figure 10).

Among the households who reported production difficulties, 49 percent claimed that production difficulties were related to the political instability.

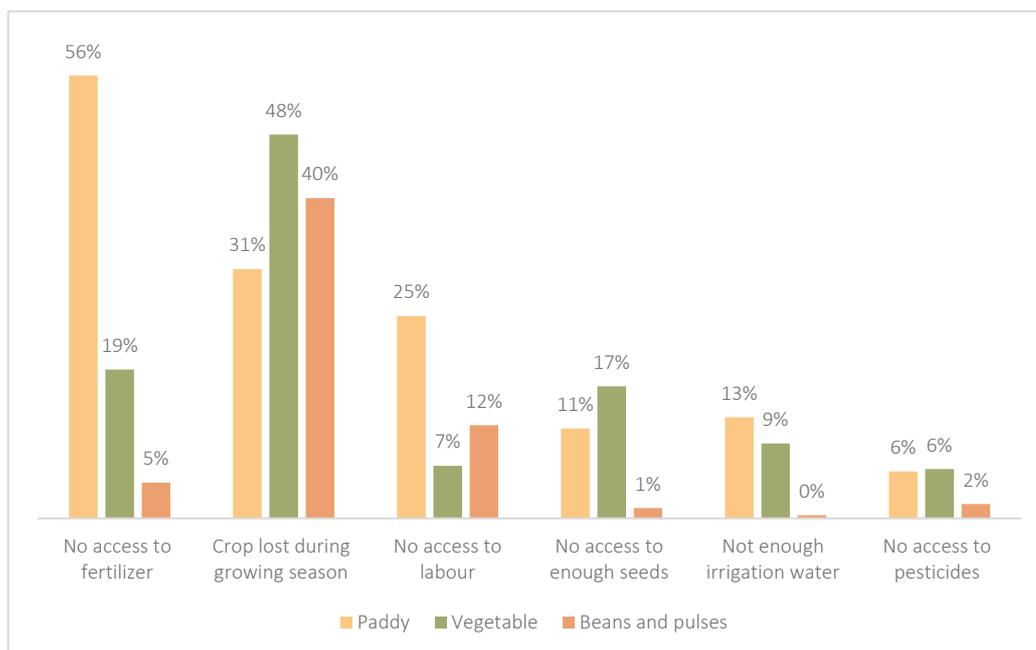
Challenges in accessing agricultural inputs (fertilizer, seeds and insecticides) were frequently cited in Kayah, Kachin, Rakhine, and Shan states (Figure 11).

Figure 9. Difficulties among crop producers faced in the three months preceding the survey



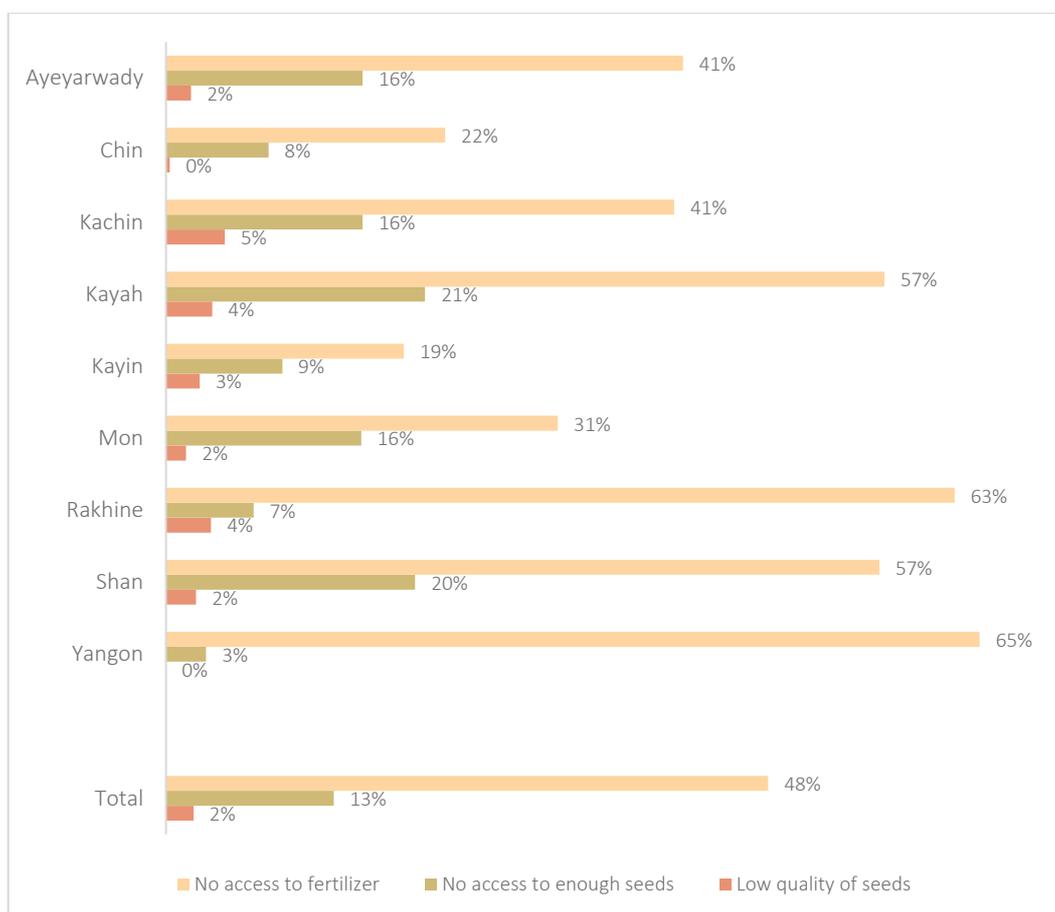
Source: FAO and WFP, 2021; FAO and WFP assessment results.

Figure 10. Main difficulties reported by households by crop type



Source: FAO and WFP, 2021; FAO and WFP assessment results.

Figure 11. Accessibility to agricultural inputs reported by households by location



Source: FAO and WFP, 2021; FAO and WFP assessment results.

Accessing inputs, notably fertilizers, seemed particularly challenging. This was consistent with the findings of the IFPRI survey (2021b), that reported that the volume of input sales dropped by 38 and 42 percent for compound and urea fertilizers.

To further explore farmers' access to fertilizer, seeds and other inputs, results were triangulated with data from FAO's inputs vendor survey.⁸ Results were consistent and showed disruptions in the supply chains of agricultural inputs. Fifty-seven percent of vendors indicated less customers than usual, and 85 percent reported a lower quantity of purchased goods. These findings point at a contraction of demand for agricultural inputs more pronounced in Kachin, Chin, Rakhine, Kayah and Ayeyarwady. Eighty-two percent of vendors faced a moderate to strong reduction in sale volume. However, results also suggest that there could have been challenges in supply – all vendors reported increased prices of fertilizer and nearly all (96 percent) reported the price as significantly higher.

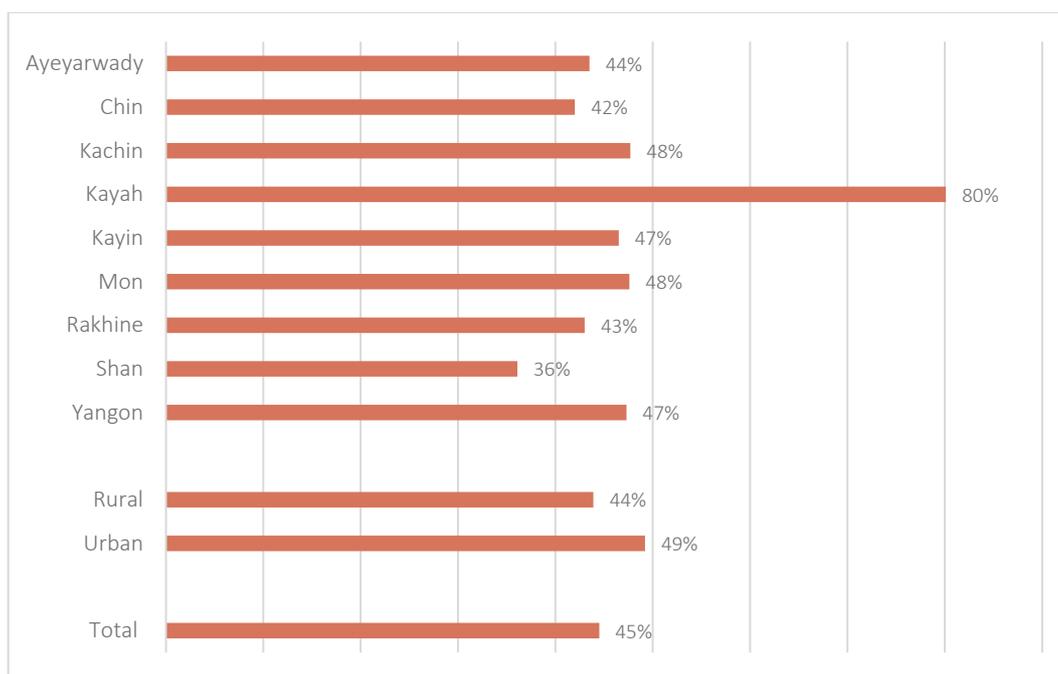
⁸ This assessment covered nine states/regions (Mon, Chin, Kayah, Kachin, Kayin, Rakhine, Ayeyarwady, Shan and Yangon) and was undertaken over the last week of June 2021 and the third week of August 2021. The quasi-totality of the retailers interviewed traded in seeds, fertilizers and chemicals.

In addition, about three-quarters of vendors reported accessibility to a banking system as a major constraint. Nearly half of the vendors (48 percent) mentioned being concerned about insufficient agricultural inputs in the coming month, particularly seeds, fertilizer and farming tools, and most (83 percent) expected prices to increase in the coming months. The above findings are consistent with the IFPRI survey (2021b) where traders reported price increases of 76 percent on average for compound fertilizer and 132 percent for urea (compared to a year ago).

Livestock

Poultry were most frequently (48 percent) kept as the main animals in households with livestock, followed by swine (29 percent) and cattle (18 percent). Nearly half of the livestock producers (45 percent) reported reduced livestock numbers compared to the same time last year. This decline was more pronounced in Kayah state (80 percent) and in urban areas (49 percent) compared to rural (44 percent) (Figure 12).

Figure 12. Percentage of households with decreased livestock numbers compared to last year by location



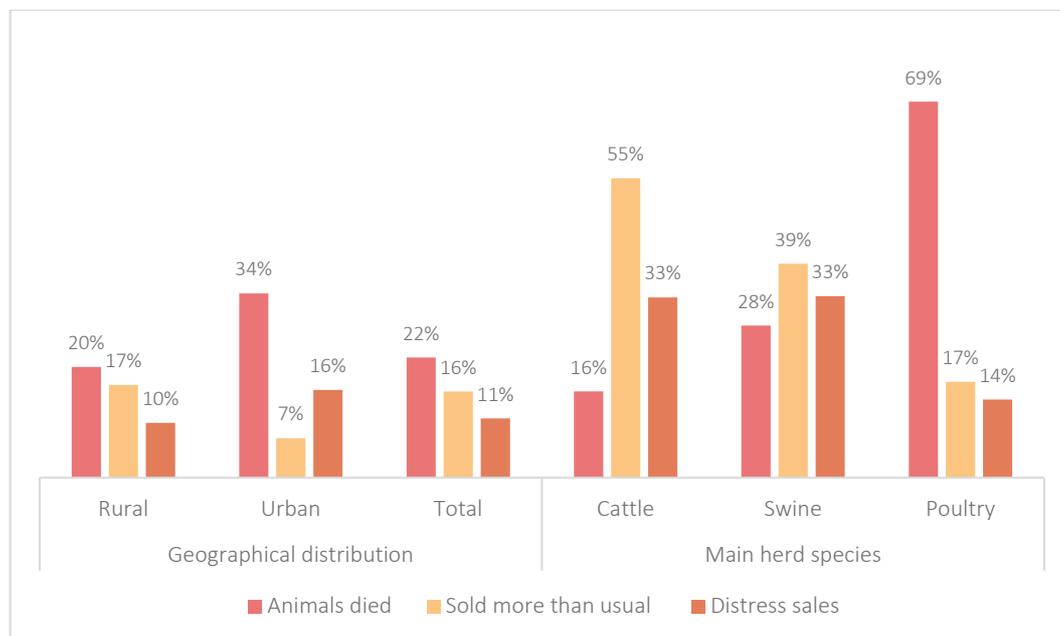
Source: FAO and WFP, 2021; FAO and WFP assessment results.

The reduction of herds and flocks was reported by nearly half of the poultry and swine farmers. The reported reasons for reduced livestock numbers were animals succumbing to poor health/ malnutrition or injury, and distress sales.⁹ However, in urban areas, producers benefited from high market prices, as there were more sales due to high prices¹⁰ rather than due to distress (Figure 13). Animal deaths were the most frequently reported reason among poultry farmers (69 percent) who experienced a reduction in poultry livestock.

⁹ When stock, or other assets must be sold quickly. Distress sales often result in a financial loss for the seller who, for reasons of economic duress, must accept a lower price.

¹⁰ Especially among cattle and swine farmers (55 and 39 percent respectively).

Figure 13. Percentage of household reported reasons for the decrease in livestock by rural, urban and herd species

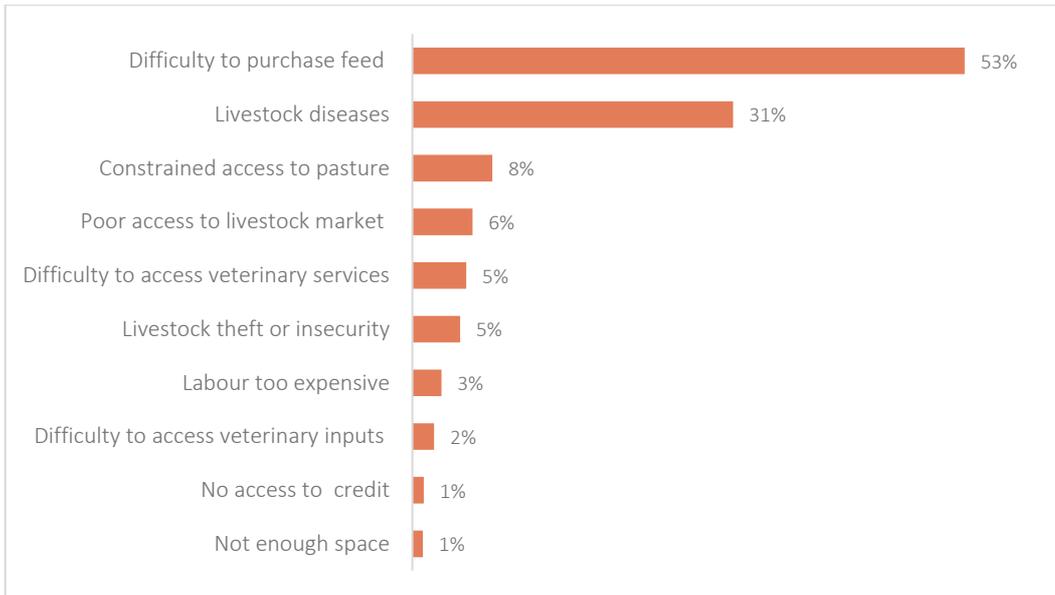


Source: FAO and WFP, 2021; FAO and WFP assessment results.

Overall, about one-third of livestock producers faced production difficulties. Difficulties were more frequently reported by producers in Kayah (55 percent) and Chin (50 percent). The most frequent difficulties were the purchase of feed and livestock disease (Figure 14).¹¹ Because markets are the most frequent source of feed/fodder, these difficulties are important to note and consistent with the hypothesis that disruptions in supply chains are the cause. Forty-five percent of farmers reported difficulties related to the political instability, especially by those citing problems in food sourcing and veterinary services.

¹¹ Difficulties faced while purchasing feed were frequently cited by farmers (74 percent) with 50 livestock or more. However, livestock disease was frequently reported by farmers owning 1–10, or 11–20 livestock (49 percent).

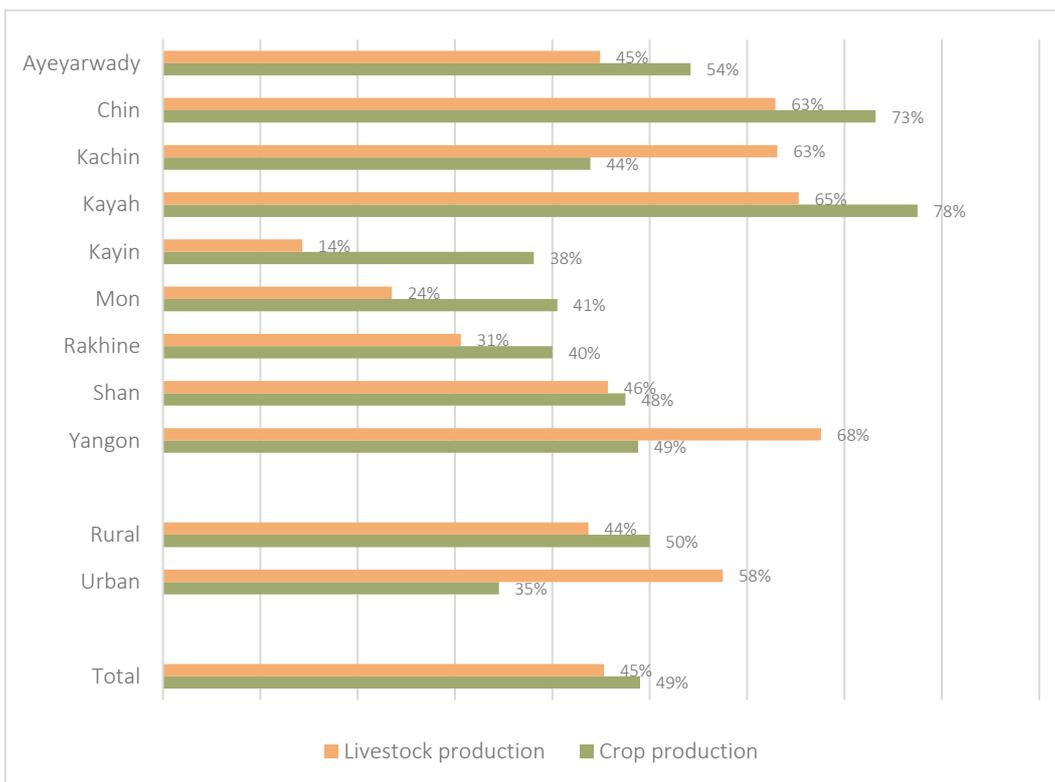
Figure 14. Percentage of respondents reporting difficulty in livestock production over the three months prior to the interview



Source: FAO and WFP, 2021; FAO and WFP assessment results.

The political instability reportedly affected both crop and livestock production at a similar rate, particularly in Kayah and Chin state. Fifty-eight percent of households from urban areas attributed their production difficulties to current political instability (Figure 15).

Figure 15. Crop and livestock production difficulties affected by the current political instability by location

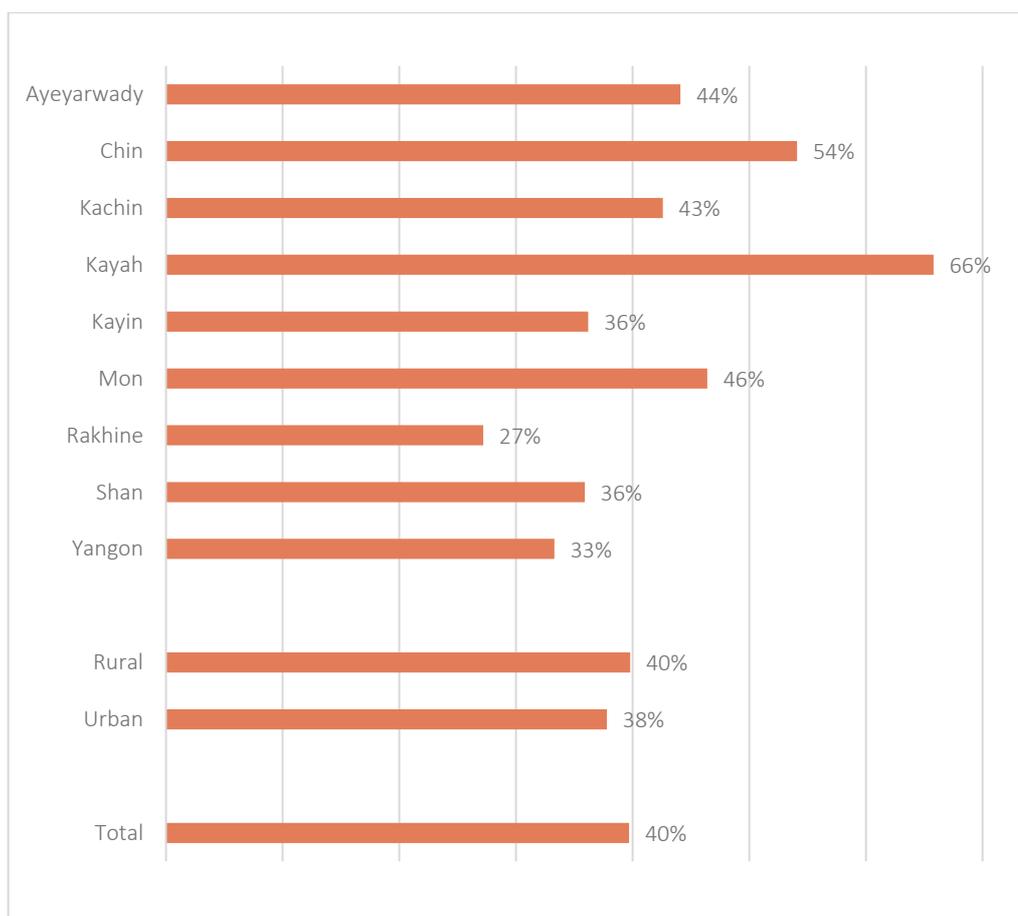


Source: FAO and WFP, 2021; FAO and WFP assessment results.

Food supply and markets

Overall, 40 percent of agricultural producers faced difficulties selling their products over the three months preceding the survey (Figure 16).¹² Chin, Kayah and Mon were particularly affected.

Figure 16. Percentage of agricultural households that faced difficulties selling products in the three months preceding the survey by location

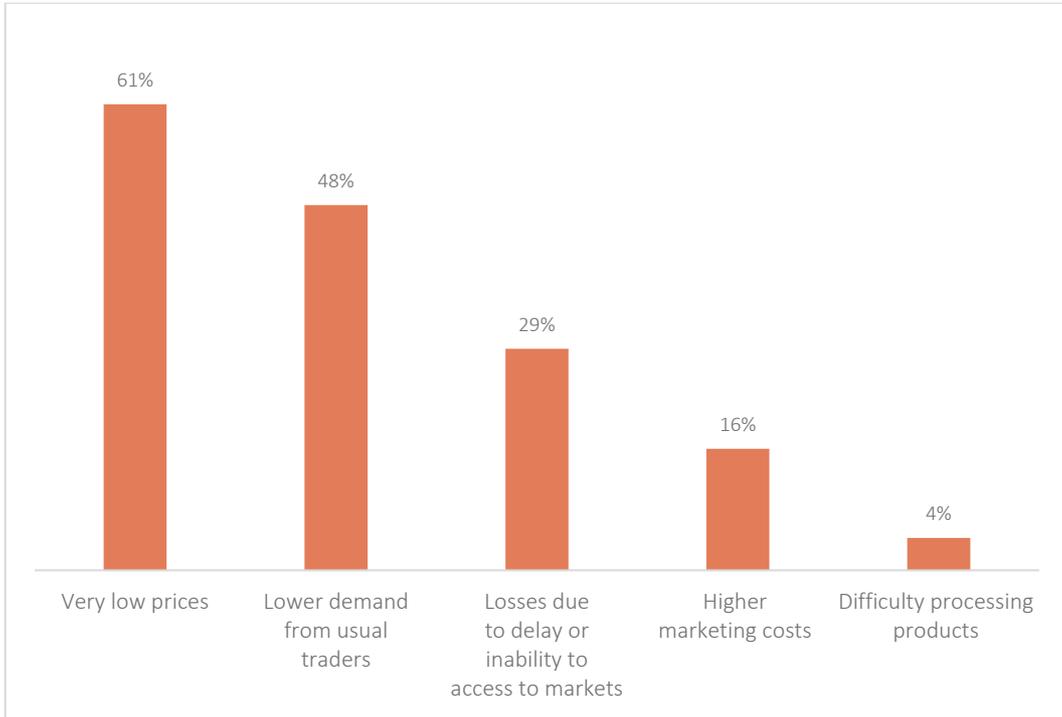


Source: FAO and WFP, 2021; FAO and WFP assessment results.

The most frequent challenges in marketing reported by crop farmers were low farm gate prices (61 percent) and lower demand from usual traders (48 percent) (Figure 17). Lower price at farm gate was most frequent in Chin, Kachin, Mon and Shan, while lower demand from usual traders was more often reported in Rakhine and Shan states.

¹² This share is higher than in the previous round, where one third of respondents cited marketing difficulties (FAO and WFP, 2021).

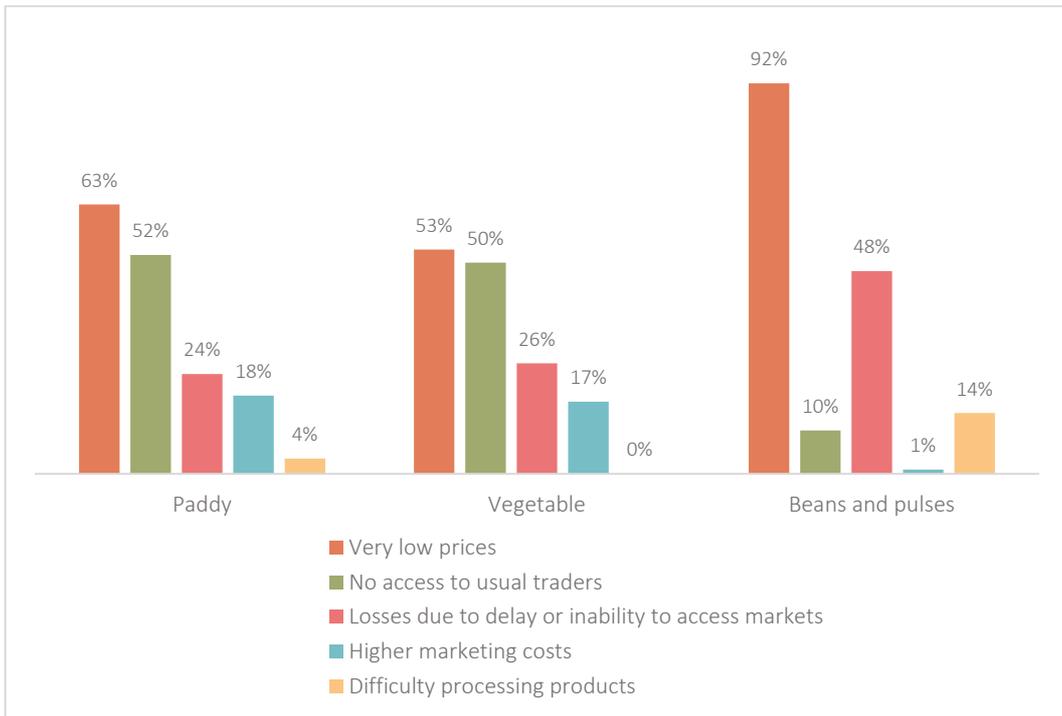
Figure 17. Marketing difficulties faced by crop producers in the three months preceding the interview



Source: FAO and WFP, 2021; FAO and WFP assessment results.

Nine out of ten producers of beans and pulses (92 percent) reported very low prices as a major marketing constraint compared to 63 percent of paddy producers and 53 percent of vegetable producers (Figure 18).

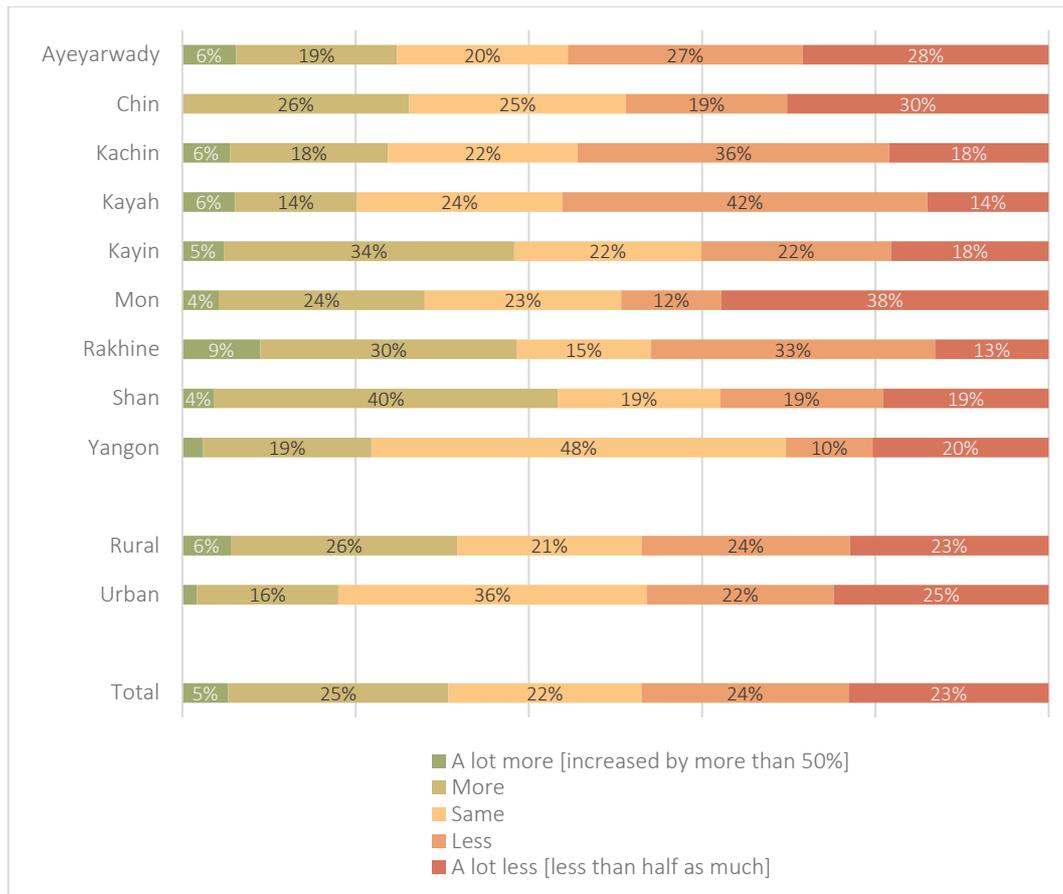
Figure 18. Difficulties in marketing by type of crop



Source: FAO and WFP, 2021; FAO and WFP assessment results.

Marketing challenges often implied a decrease in the sale price with 47 percent of farmers reporting that they had to sell their products at a lower price than normal for the period (Figure 19). The producers from Yangon, Chin and Kayah mentioned more frequently lower selling prices, but in Mon, 38 percent of producers sold their products at less than half the normal price.

Figure 19. Change in selling price of crops by location



Source: FAO and WFP, 2021; FAO and WFP assessment results.

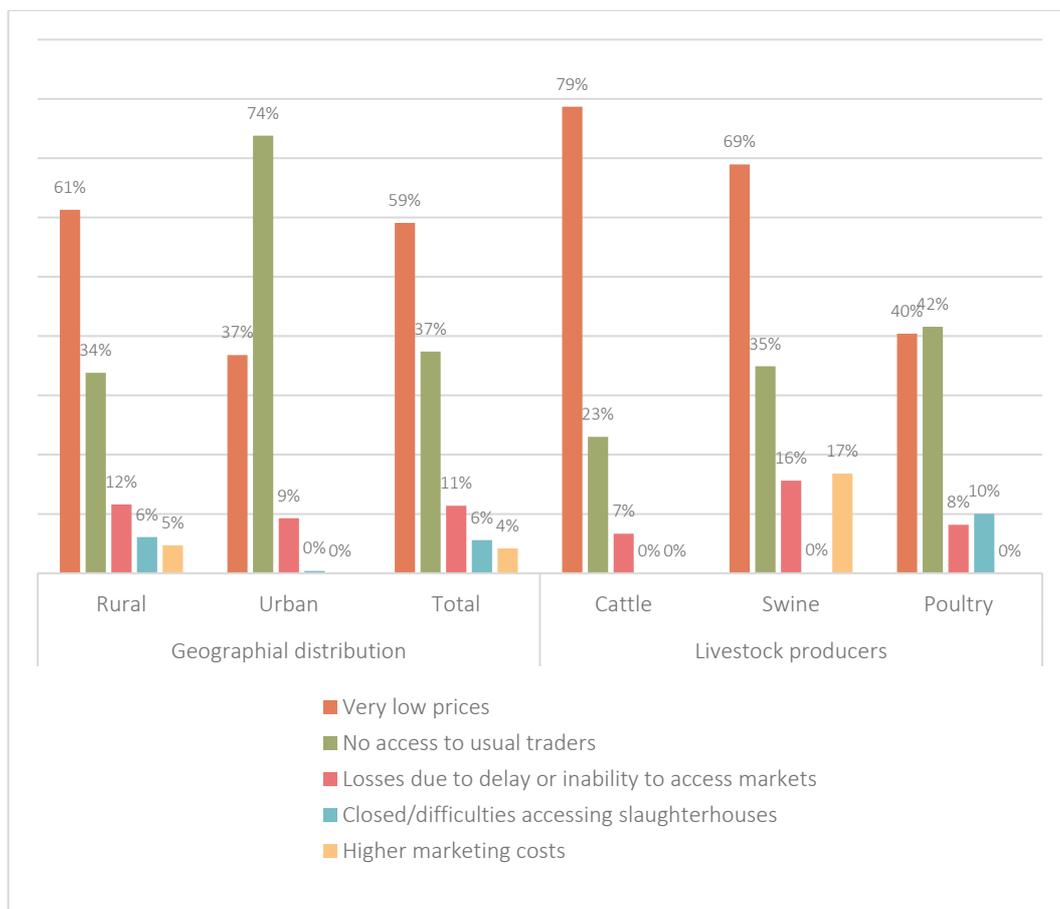
Constraints to agricultural marketing such as low farm gate price, lack of access to usual traders and no access to markets are surprising, especially considering high food prices were among the most frequently cited shocks (see following section). Yet, these results are not only in line with findings from IFPRI (2021a)¹³ but also consistent with indications of market and transport disruptions. Fifteen percent of IFPRI (2021b) respondents reported mobility restrictions in marketing as related to political instability, and insight from WFP monthly market price monitoring pointed to high transportation costs (high fuel costs, reduced frequency of transportation, movement restrictions due to COVID-19, insecurity and monsoon conditions) as a major driver of widening the gap between producer and consumer prices.

¹³ In the IFPRI survey, 43 percent of the rural community reported difficulties when selling their products, and 30 percent cited lower farm gate prices and fewer traders coming to the community as the second most frequent challenges.

In addition, 25 percent of livestock producers faced challenges when selling their products, especially in Chin (69 percent), Kayah (63 percent), Kachin (42 percent), and Yangon (41 percent). Low farm gate prices and accessibility to usual traders were the major challenges for livestock producers. Marketing difficulties for livestock and livestock products concentrate in urban areas, in particular inaccessibility to usual traders (Figure 20).

Thirty-seven percent of livestock producers (higher in urban areas) that reported marketing difficulties attributed them to the current political instability.

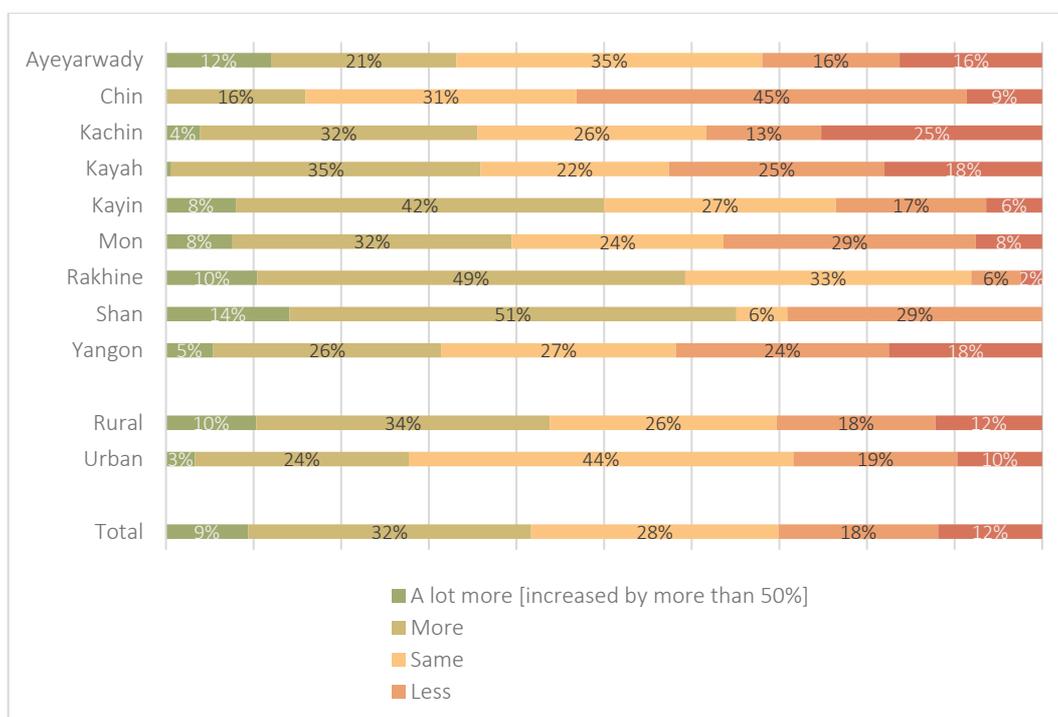
Figure 20. Difficulties faced by geographical distribution and type of livestock production



Source: FAO and WFP, 2021; FAO and WFP assessment results.

Similar to crop producers, 30 percent of livestock producers sold their product at a less rate or a lot less compared to normal, particularly in Chin, Kayah and Yangon (Figure 21), and especially when considering cattle sales.

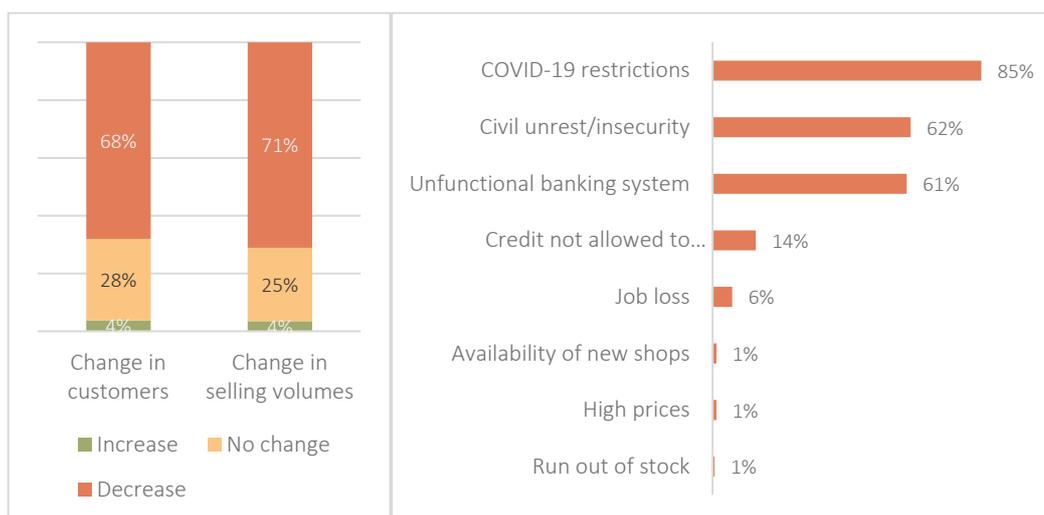
Figure 21. Livestock producers reported change in selling price by location



Source: FAO and WFP, 2021; FAO and WFP assessment results.

The majority of food traders interviewed (68 percent) reported less customers in the month preceding the survey and nearly 75 percent mentioned a reduction in the volume purchased (Figure 22). COVID-19 travel restrictions, political instability and a poorly functioning banking system are the main reasons for a reduction in volume purchased, followed by no access to credit for customers (14 percent) and job loss (6 percent).

Figure 22. Changes in customers and selling volumes in the month preceding the survey (left), and the reported reasons for the reduction in volume purchased (right)



Source: FAO and WFP, 2021; FAO and WFP assessment results.

In the face of marketing challenges, 21 percent of food traders changed their marketing strategy and reached out to customers through phone (14 percent), delivery (11 percent), online platforms (3 percent), and social media (2 percent).

Livelihoods, incomes and coping strategies

The 1 February military takeover destabilized the economy and intensified conflict and insecurity. In addition, since June 2021, Myanmar has been heavily affected by a third wave of COVID-19 triggering new movement restrictions. Both urban and rural, agricultural and non-agricultural households have been affected by the disturbances, with most households reporting a reduction in income across different livelihood types and an unusually high proportion of households reporting no income (18 percent).¹⁴ To make ends meet, households resorted to strategies reducing their capacity to cope with additional future shocks, deplete their livelihood assets, and decrease their future productivity.

Livelihoods and income sources

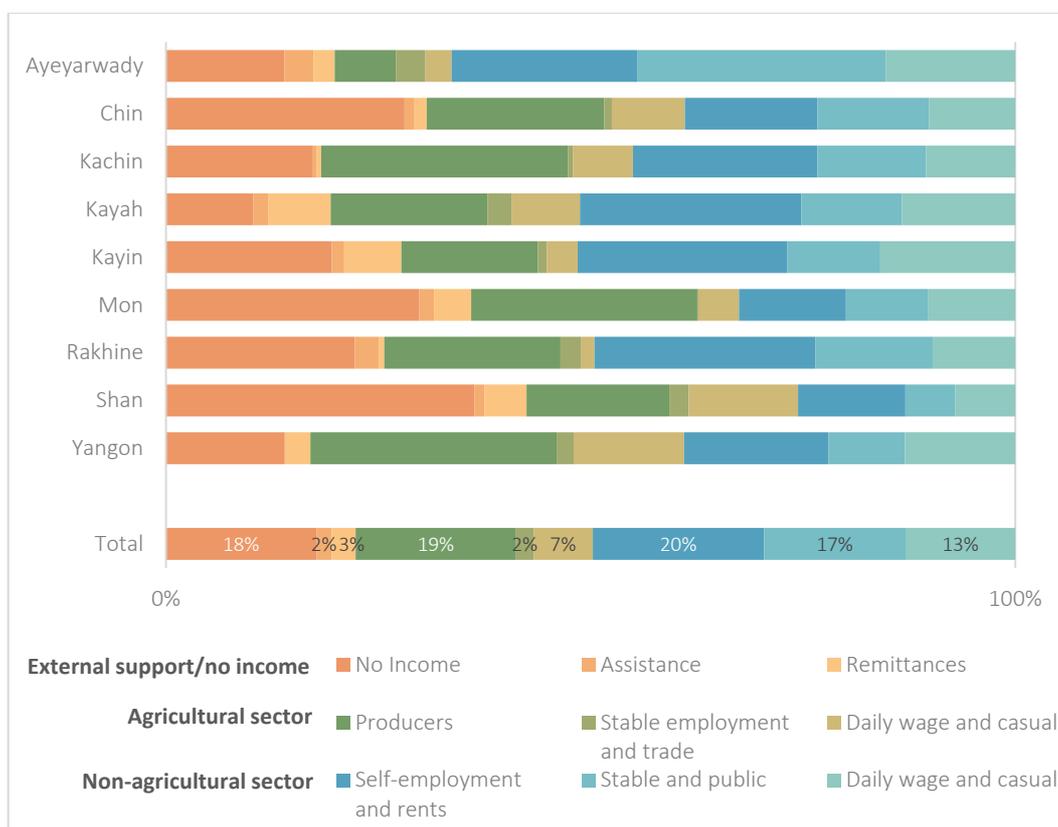
Households were asked to identify their primary source of income in the three months leading up to the interviews. Twenty-four percent of respondents were working informal jobs compared to 57 percent with regular employment.¹⁵ By sector, 28 percent reported recent primary employment in the agricultural sector, 50 percent in the non-agricultural sector, and 5 percent reported that their income was not derived from work but rather from assistance (2 percent) or remittances (3 percent).

Overall, 18 percent of households reported no income source at all and relied exclusively on savings or debt, a figure that sheds light on the extent of the disruption of livelihoods and employment at the time of the assessment (Figure 23). The situation was particularly worrisome in Chin, where 36 percent of households reported no income, Kayah (30 percent), and Shan (28 percent). While dependence on assistance or remittances in absence of a more stable primary income source was overall quite low, it rose to 4 percent in urban areas compared to rural areas (1 percent) and to 7 percent in Kayin and Mon.

¹⁴ According to UNDP (2021), the compounded effect of COVID-19 and the military takeover will substantially increase poverty rates in the country, with an estimated 46 percent of the population potentially living below the national poverty line by early 2022.

¹⁵ Informal income sources include daily wages and casual jobs, including informal trade, in both the agricultural and non-agricultural sectors. Regular jobs include farming producers, stable salaried employment, formal traders and self-employed.

Figure 23. Percentage of households by main income-generating activities by location



Source: FAO and WFP, 2021; FAO and WFP assessment results.

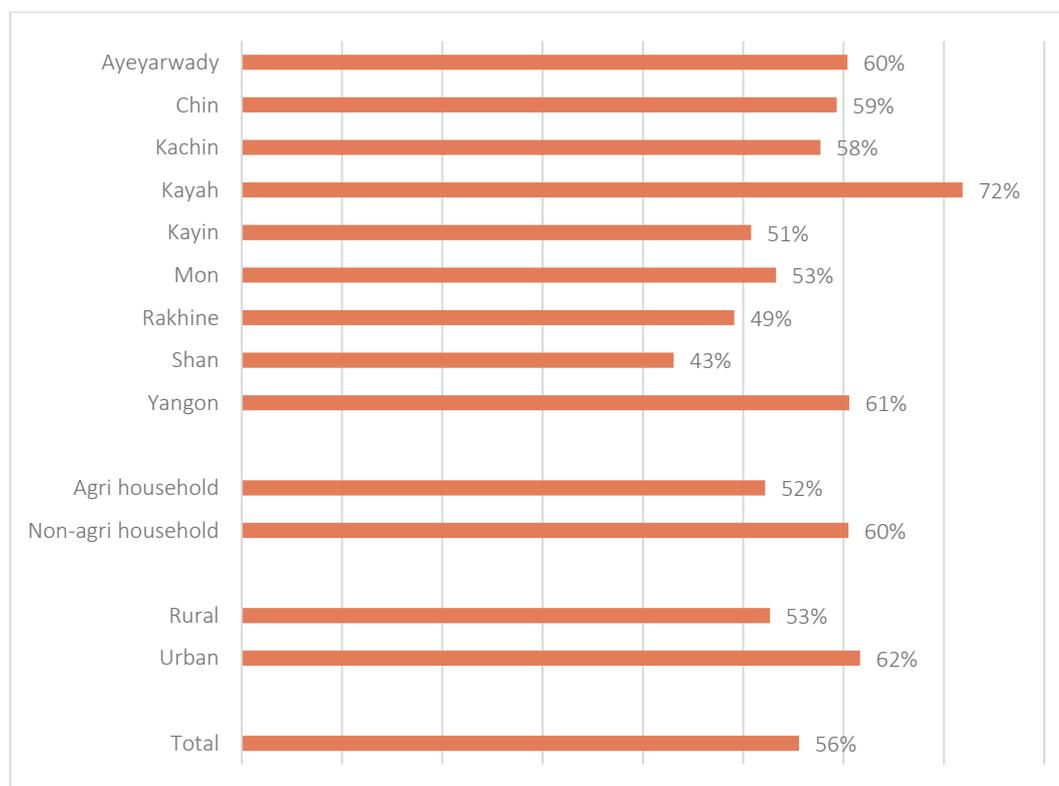
The average number of income earners per household was 1.6. Forty percent of households reported one income earner and 29 percent reported two income earners. Based on the hypothesis that households have fewer income earners supporting larger households (equivalent to a ratio of one income earner to more than four members, or <0.25) are likely to be more vulnerable than smaller households and/or more income earners (ratio of ≥ 0.25 income earners to household size), a variation of an income dependency ratio was included in the analysis.

Overall, 33 percent of the households had high income dependency (<0.25 income earners to household size, or equivalent of one earner supporting more than four people). However, this rose significantly in Chin (59 percent) and in Kayah (58 percent) where household sizes tended to be higher, yet the number of income earners remained low or non-existent, and where many households reported no income.

Shocks

According to the assessment, 56 percent of households experienced at least one shock that affected their ability to raise an income and/or to produce food for self-consumption in the three months preceding the survey. By state/region, the proportion was highest in Kayah (72 percent), Yangon (61 percent), Ayeyarwady (60 percent), Chin (59 percent) and Kachin (58 percent), and was slightly higher in urban areas (62 percent) compared to rural (53 percent), and among non-agricultural households (61 percent) compared to agricultural households (52 percent) (Figure 25).

Figure 24. Percentage of households experiencing any shock in the three months preceding the interviews



Source: FAO and WFP, 2021; FAO and WFP assessment results.

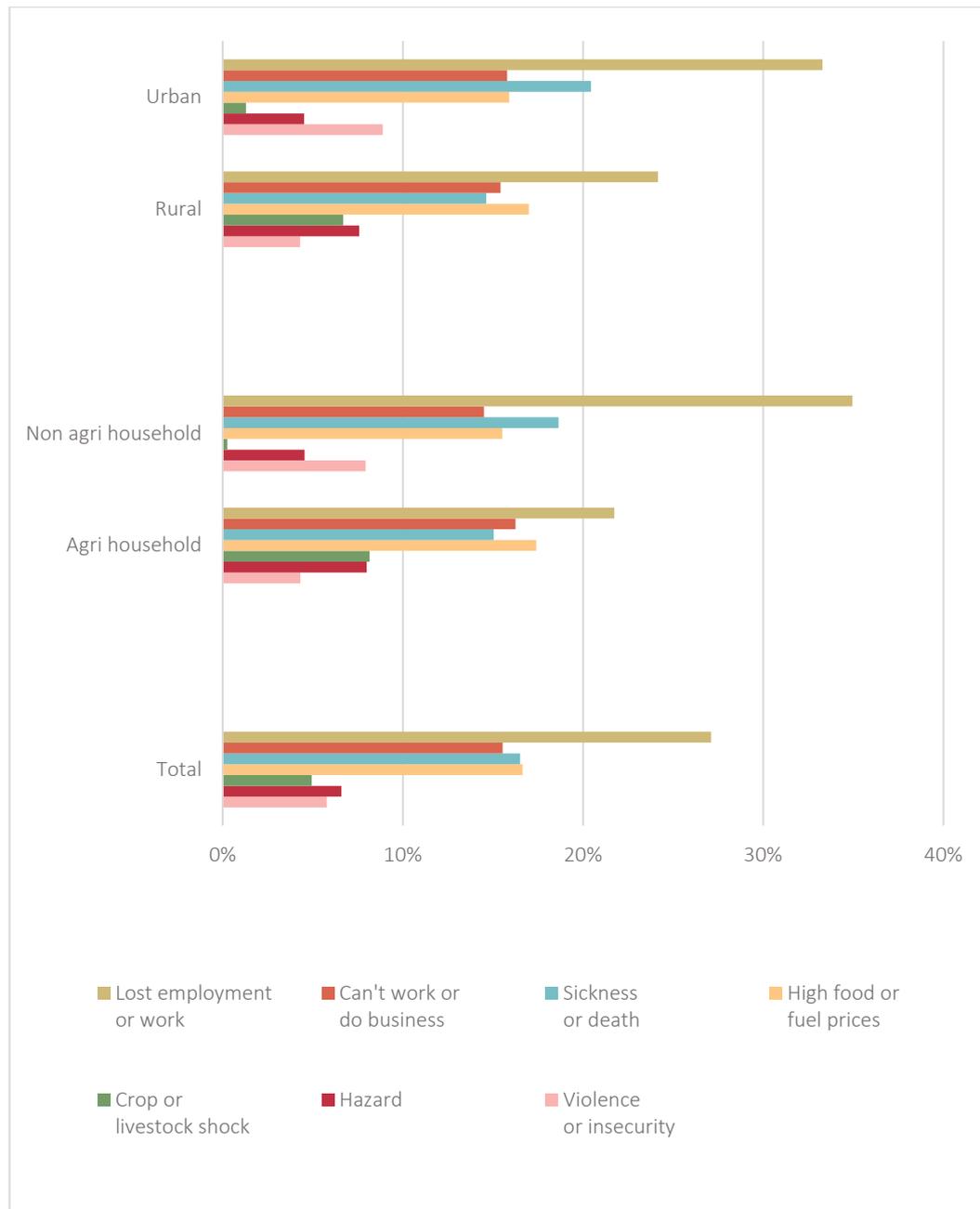
The most frequently cited shocks were economic in nature with 27 percent of respondents citing the loss of employment, 16 percent indicating that they could not work nor conduct business, and 17 percent reporting high fuel or food prices. A further 17 percent reported sickness or death of a household member (Figure 25).¹⁶ A greater proportion of non-agricultural households reported losing employment or work (35 percent) compared to agricultural households (22 percent); while 35 percent of recent migrants, IDPs and returnees reported losing employment or work compared to 26 percent of permanent residents; and among households whose primary income source was informal, 35 percent reported losing employment or work compared to 23 percent of households with a regular income source (Figure 26). Of the households reporting that they couldn't work nor conduct business, a higher share was seen among households who were dependent on assistance as their primary income source in the three months prior to the survey (26 percent), and in Kayah (29 percent) compared to other states/regions. The inability to work or conduct business included lack of access to pasture, which was reported by 9 percent of households and by higher proportions in Kayah (14 percent), Shan (13 percent) and Ayeyarwady (12 percent).

Although less commonly reported overall, 5 percent of respondents indicated shocks related to farming production (pest outbreaks, plant or animal disease), 7 percent reported natural hazards (floods, droughts, landslides, earthquake, fire), and 6 percent reported violence and insecurity or conflict. However, a different story emerges when

¹⁶ Sickness or death of household member(s), i.e. sickness of breadwinner/unusually high medical expenditure/funeral expenses/death of breadwinner.

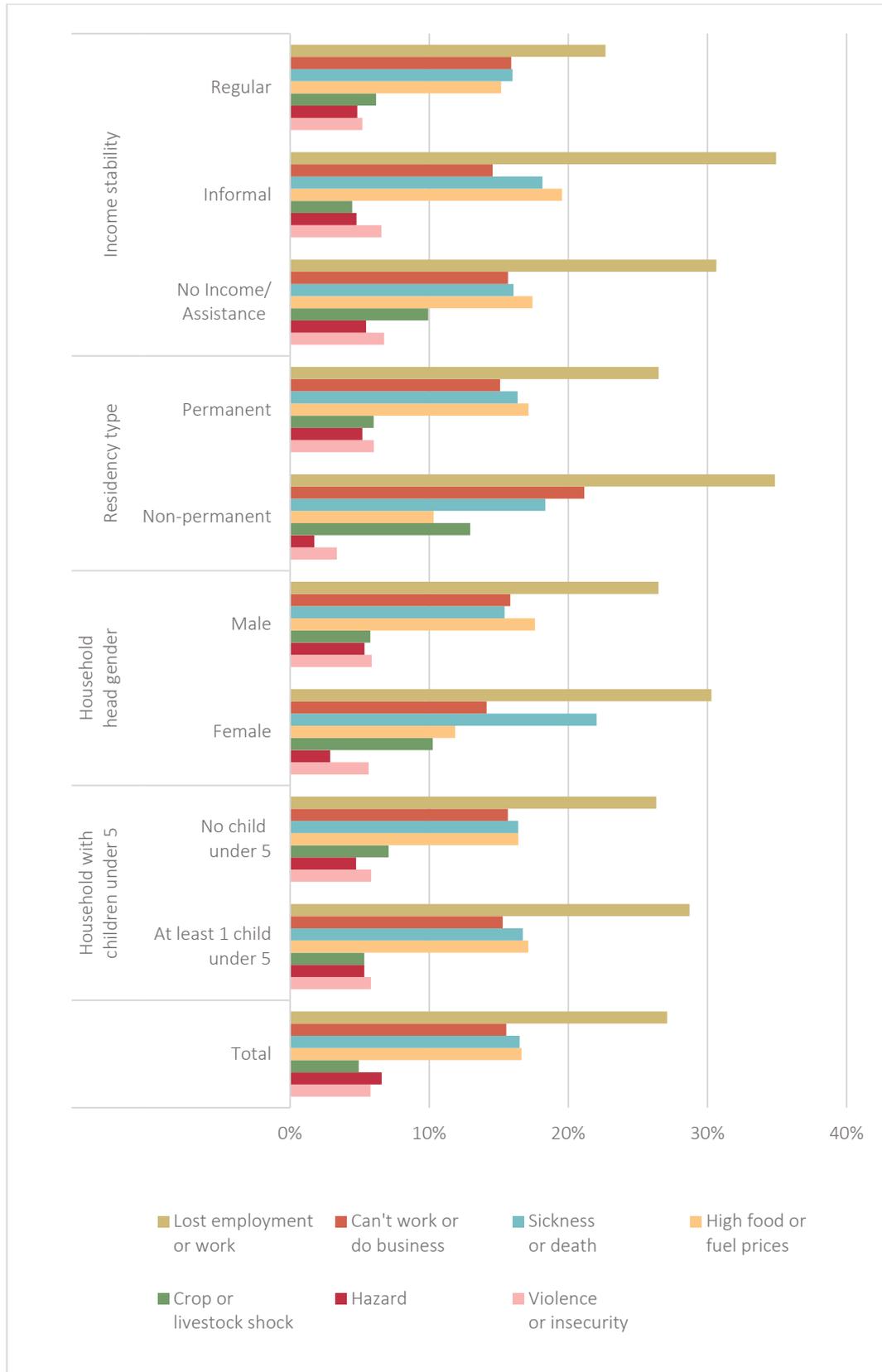
the experience of shocks is disaggregated geographically. For example, the impact of violence and insecurity on households was significantly higher in Kayah state where 41 percent of households reported that this shock affected their ability to raise an income and/or produce food for self-consumption in the three months leading up to the survey. Natural hazards were reported by a greater share of households in Kayin, Mon and Rakhine (14–18 percent) than in other states/regions reflecting the impact of flooding on these states (Figure 27).

Figure 25. Shock experienced by households in the three months preceding the interviews by rural/urban and agricultural/non-agricultural households



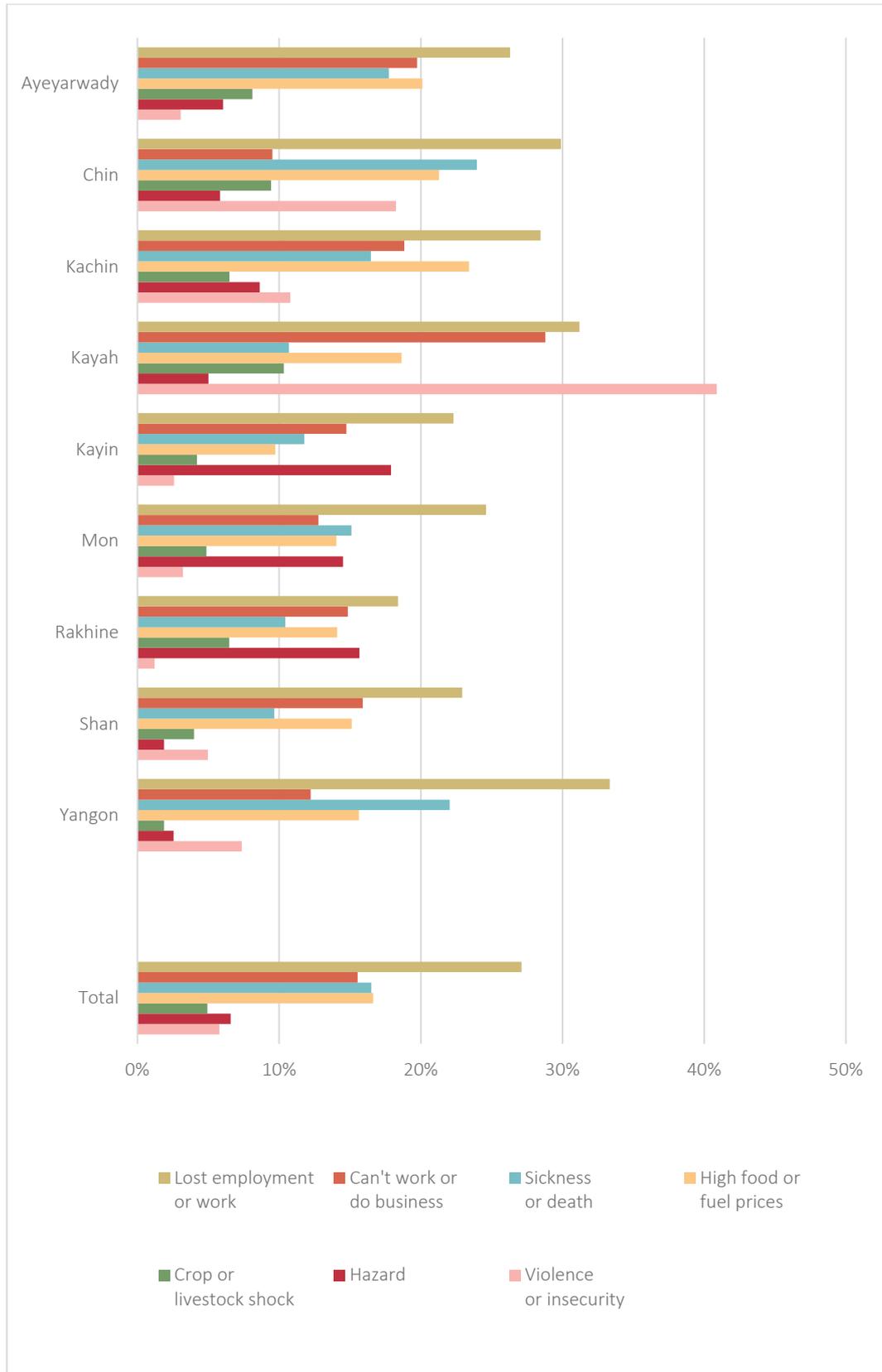
Source: FAO and WFP, 2021; FAO and WFP assessment results.

Figure 26. Shock experienced by households in the three months preceding the interviews by key household characteristics



Source: FAO and WFP, 2021; FAO and WFP assessment results.

Figure 27. Shock experienced by households in the three months preceding the interviews by location

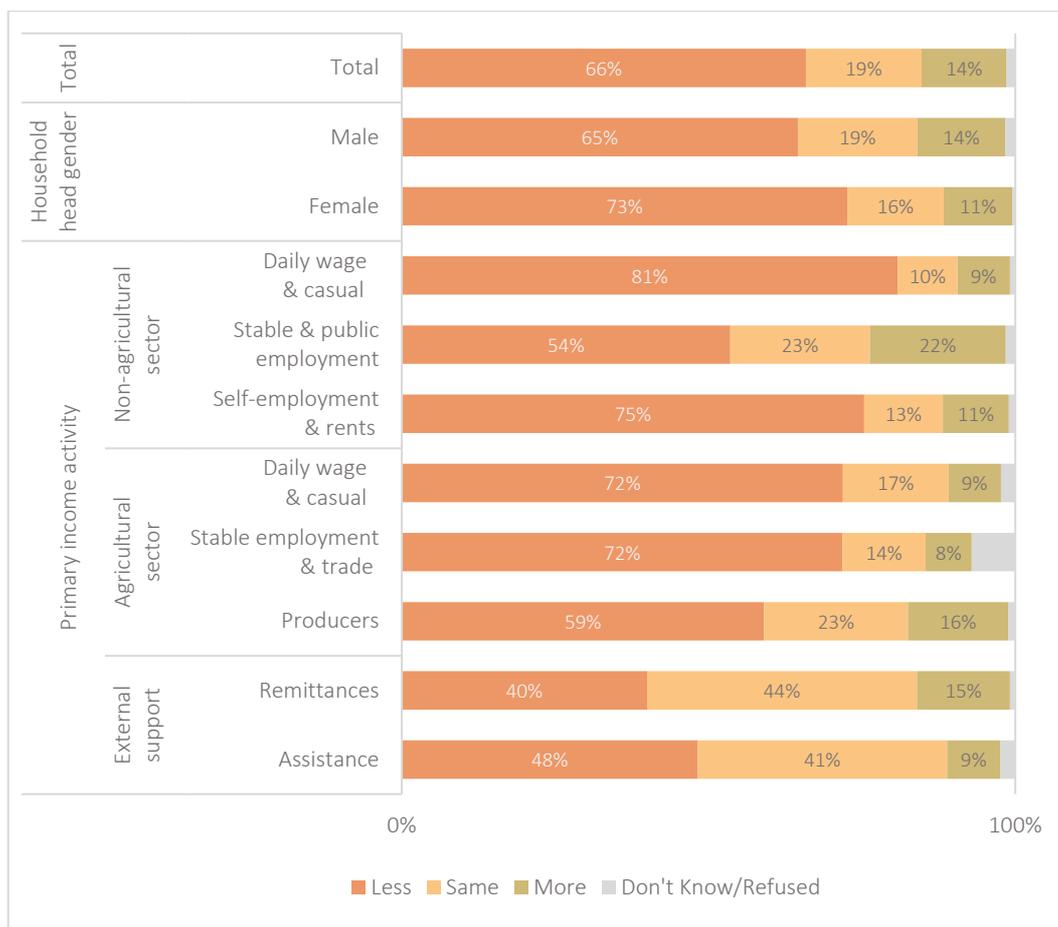


Source: FAO and WFP, 2021; FAO and WFP assessment results.

Households were also asked if they were affected by any COVID-19 related mitigation measures in the previous three months, including movement restrictions on goods, shutting of food markets, closure of international borders, stay at home orders, ban on gatherings, and closure of food processors. Overall, 51 percent of households were affected by at least one of the mitigation measures. The highest proportion of households were affected by stay-at-home orders (23 percent of households), followed by movement restrictions (22 percent), and the ban on gatherings (17 percent). Fifty-nine percent of households in Kachin were affected by at least one COVID-19 measure.

Households that reported an income in the three months leading up to the survey were asked how that income changed when compared to the same period in a typical year, over the past five years. Two-thirds (66 percent) expressed that their primary income was less or a lot less than usual. Of those reporting a reduction, 37 percent of households reported a reduction of over 50 percent. Reduced income was more frequently reported in Ayeyarwady (70 percent) among households whose main source of income was in daily wage and casual non-agricultural employment (81 percent) and self-employment (75 percent). Seventy-three percent of female-headed households reported a reduction as did 69 percent of non-agricultural households (Figure 28). Overall, rural and urban households were similarly affected by income reduction.

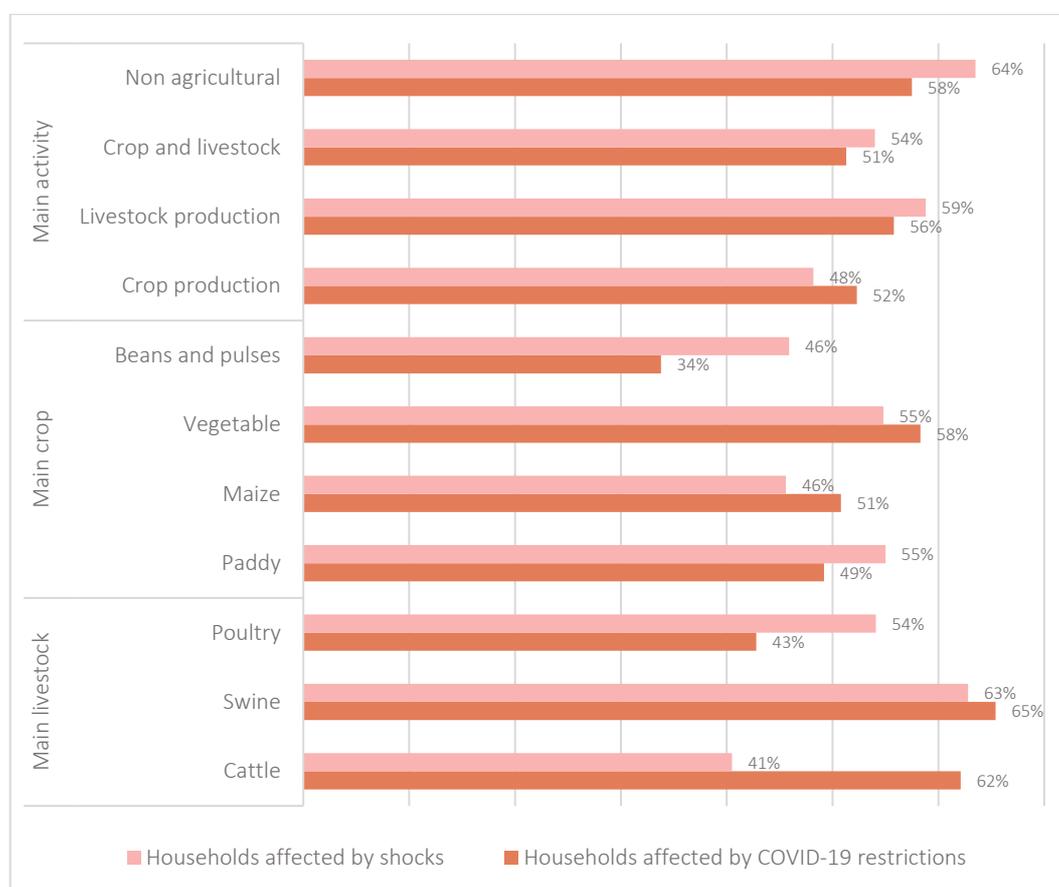
Figure 28. Percentage of households that experienced reduced income in the three months preceding the interviews compared to the same period over the last five years



Source: FAO and WFP, 2021; FAO and WFP assessment results.

Among households reporting income losses, a larger share of livestock farmers and non-agricultural households were affected by COVID-19 restrictions and economic shocks like losing a job or being unable to work (Figure 29) compared to other households. For crop producers, a greater share reported that the effects of COVID-19 restrictions were greater than those caused by economic shocks.¹⁷ However, when the income loss of crop producers was further disaggregated by main crop produced, 55 percent of paddy farmers reported the effects of shocks such as pest outbreak, plant disease, and flooding as the most severe; and vegetable farmers reported the effects of COVID-19 restrictions such as movement restrictions for goods impeding or delaying the ability to transport goods to markets as more severe than economic shocks. Movement restrictions also affected cattle and swine producers, along with closed markets and marketing difficulties,¹⁸ while poultry farmers were more affected by the lack of physical access to roaming and animal disease. Forty-nine percent of poultry farmers reduced their flock size, compared to the same period last year.

Figure 29. Income losses attributed to COVID-19 restrictions and reported economic shocks (lost job/cannot conduct business) by main crop, main livestock and main activity



Source: FAO and WFP, 2021; FAO and WFP assessment results.

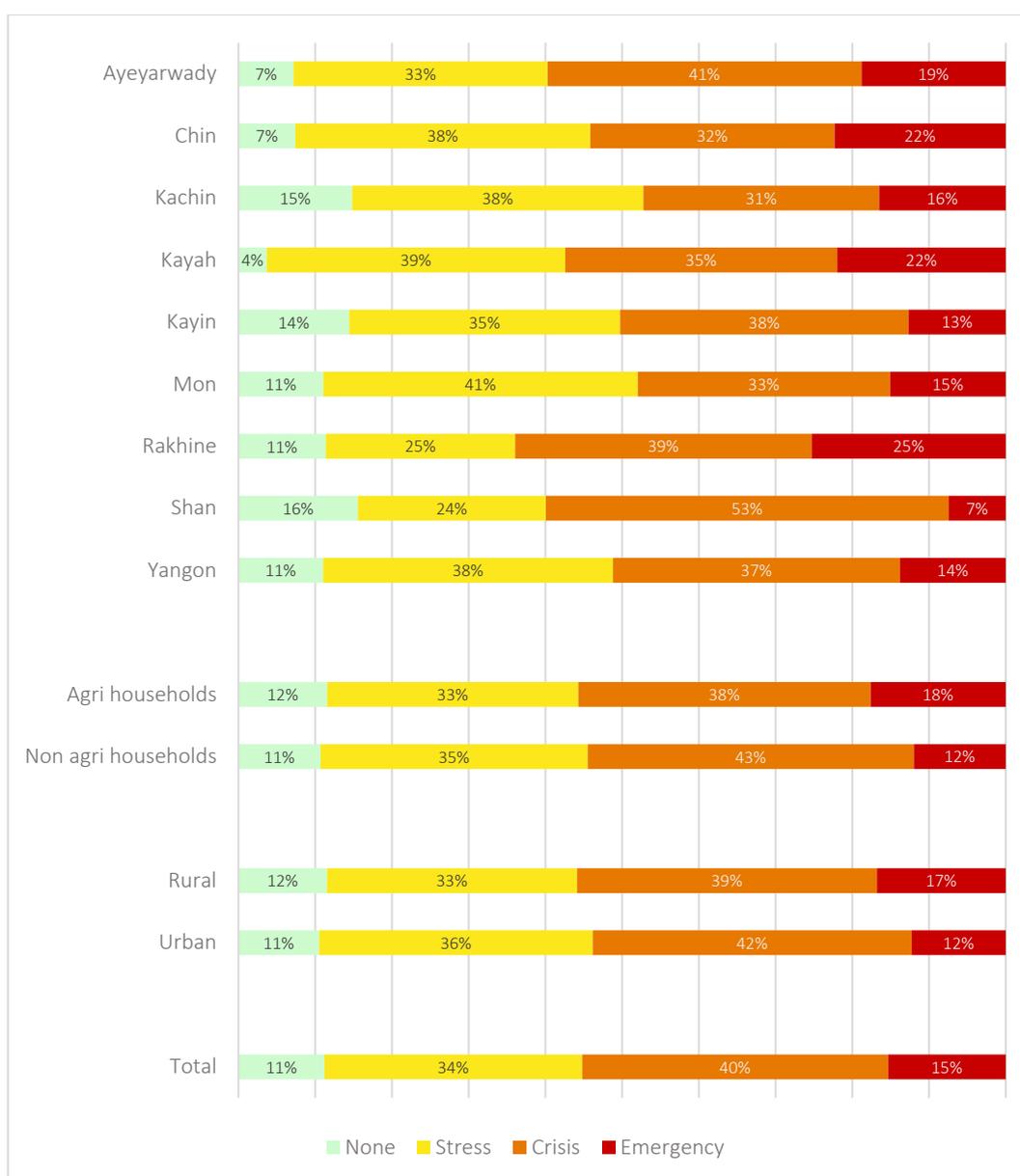
¹⁷ In difficulties in crop marketing, 43 percent (lower demand from usual traders) and 23 percent (losses due to delay or inability to access to markets) of crop producers are reported.

¹⁸ Seventy-nine percent of cattle producers and 69 percent of swine producers reported lower farm-gate prices as major marketing challenges.

Livelihood coping strategies

The compounding of shocks and the undermining of a household's ability to pursue livelihoods, either through economic shocks or the deteriorating security situation, has left households with no choice but to resort to coping strategies due to lack of food or money to buy food. Overall, nine out of ten households (89 percent) resorted to at least one type of coping strategy. This share is higher in Kayah (96 percent), Ayeyarwady and Chin (93 percent). Fifty-five percent of respondents resorted to crisis or emergency strategies, such as selling productive assets, reducing health and education expenditures, and engaging in high-risk activities, which erode a household's resilience and capacity to manage future shocks by depleting livelihood assets. The use of more extreme measures was highest in Rakhine (64 percent employing crisis or emergency strategies), and Ayeyarwady and Shan (60 percent) (Figure 30).

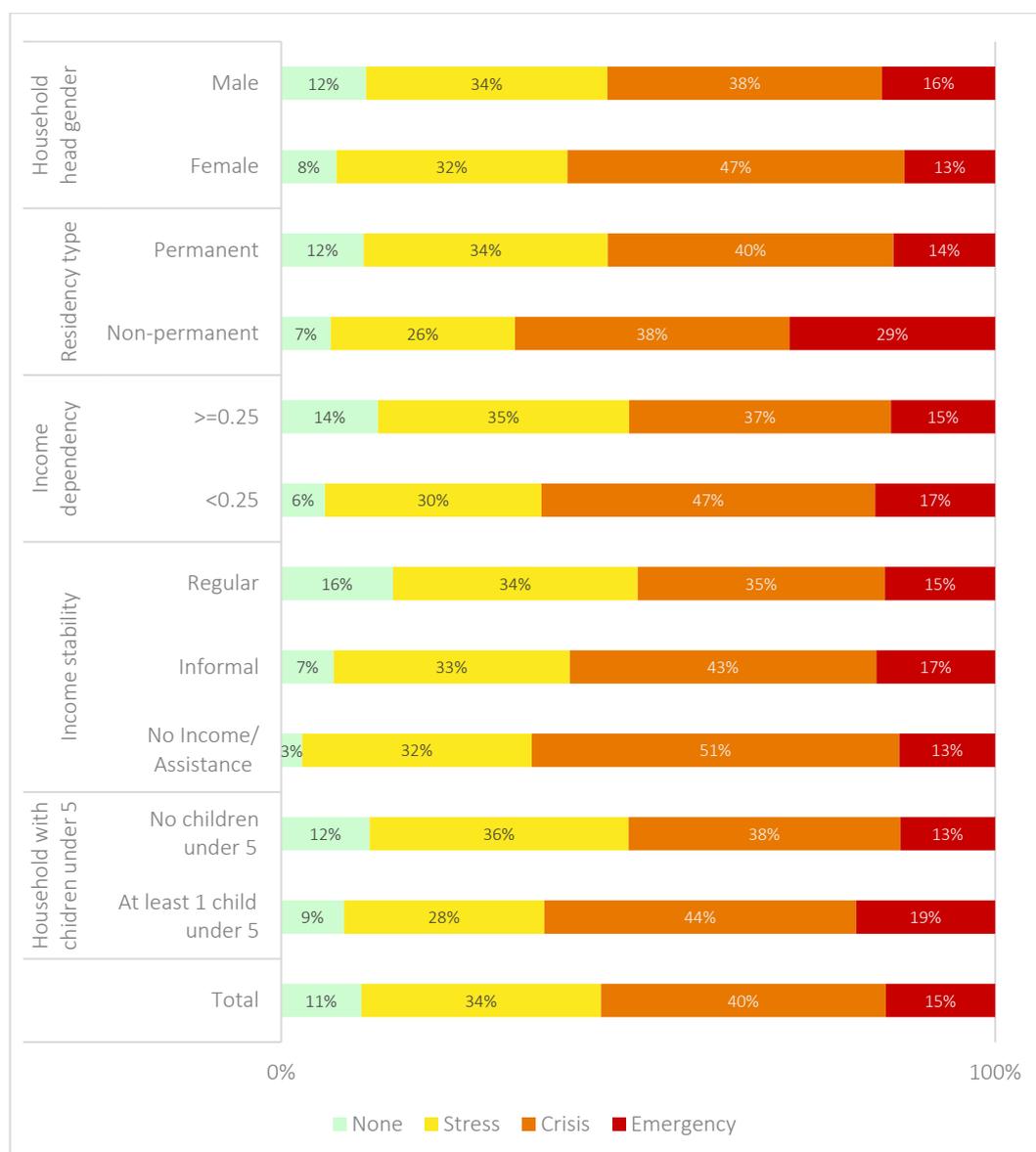
Figure 30. Livelihood-based coping strategies index by location



Source: FAO and WFP, 2021; FAO and WFP assessment results.

Households with high income dependency (equivalent of one income earner supporting more than four household members), no income, non-permanent residency status (IDPs, migrants, returnees), female-headed, and those with at least one child under five years of age were all found to employ crisis and emergency strategies more often (Figure 31). Notably, 29 percent of recent IDP, migrants and returnee households were employing emergency strategies with nearly one in five households (18 percent) having to engage in high-risk activities,¹⁹ compared to the overall average of 9 percent of households. Households with high dependency ratios (equivalent of one income earner supporting more than four people) were more likely to be employing crisis or emergency coping strategies (64 percent) compared to those with lower dependency ratios (51 percent).

Figure 31. Livelihood coping classifications by key characteristics



Source: FAO and WFP, 2021; FAO and WFP assessment results.

¹⁹ Defined as any type of activity that the household feels incurs high risk to themselves while they are working, including illegal activities or jobs that they have never done before.

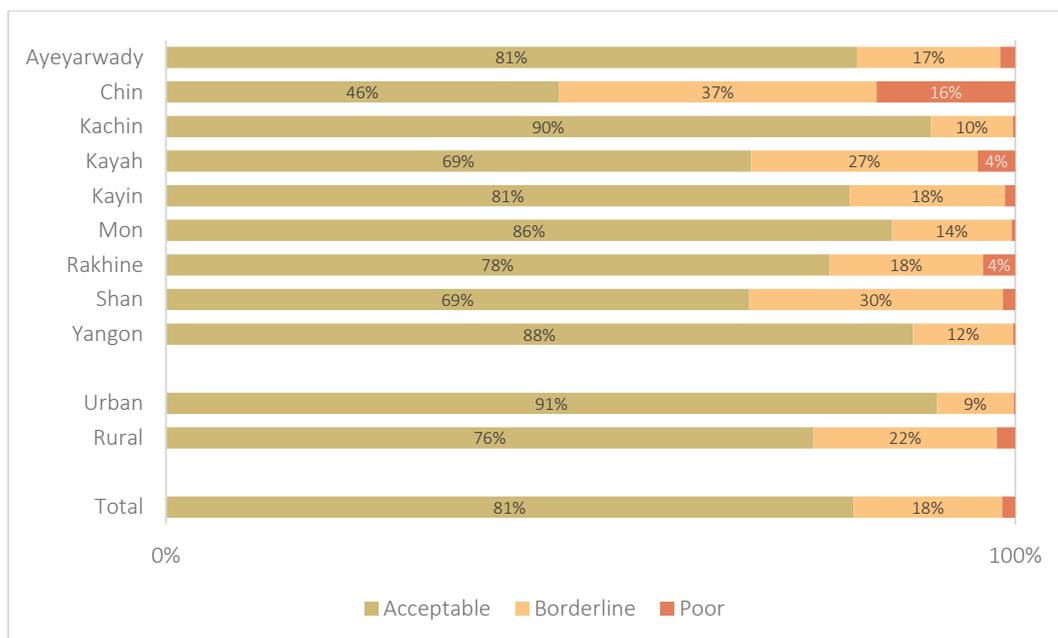
Food security

Food security was assessed through two indicators:

- the food consumption score (FCS)²⁰ – a composite of dietary frequency, food frequency and the relative nutritional importance of different food groups; and
- the food insecurity experience scale (FIES) – an experience-based metric of food insecurity. Its standard module consists of eight questions referring to conditions and experiences typically associated with the inability to access food. When applied to the 30 days preceding the assessment (as was the case for this survey), the data can be used to estimate the prevalence of recent food insecurity at different levels of severity (Cafiero, *et al.*, 2018).

According to the FCS, 20 percent of the households had poor or borderline consumption (2 and 18 percent respectively) (Figure 32). Chin stands out with particularly high levels of insufficient consumption (54 percent), as well as Kayah and Shan (31 percent each). These results cannot be rigorously compared to those from the last round. However, food consumption seems to have deteriorated, especially in these two states and in rural areas (Kayah was not covered in the 2020 assessment).²¹ In the case of Chin, FCS results point to particularly poor consumption of protein (1.5 days of pulses and 2.1 days of meat/fish/eggs, on average per week). The consumption of fruit was also infrequent in Chin and Rakhine (1.7 days per week).

Figure 32. Percentage of household food consumption by location



Source: FAO and WFP, 2021; FAO and WFP assessment results.

²⁰ For guidelines on the FCS, see: https://fscluster.org/handbook/Section_two_fcs.html.

²¹ Results from the 2020 survey were not weighted, only a share of respondents were randomly selected, and the round had a slightly different coverage area, therefore, comparisons with the current round are only indicative.

Table 2. Recent food insecurity as measured by the food insecurity experience scale (in percentage; standard deviations between parenthesis)

	Recent moderate and severe food insecurity	Recent severe food insecurity
Region/State (Admin 1 level)		
Ayeyarwady	30.7 (± 6.9)	1.3 (± 1.4)
Chin	37.2 (± 11.0)	2.3 (± 3.4)
Kachin	24.3 (± 7.1)	1.0 (± 1.6)
Kayah	41.6 (± 11.9)	2.4 (± 3.1)
Kayin	26.0 (± 8.6)	0.7 (± 1.3)
Mon	24.7 (± 6.9)	0.5 (± 0.5)
Rakhine	36.8 (± 9.9)	1.9 (± 1.8)
Shan	24.4 (± 10.9)	0.1 (± 0.2)
Yangon	25.2 (± 6.5)	1.4 (± 1.7)
Status Rural/Urban		
Rural	29.2 (± 4.2)	1.1 (± 0.7)
Urban	24.1 (± 5.2)	1.1 (± 1.4)
Total sample	27.5 (± 3.3)	1.1 (± 0.6)

Source: FAO and WFP, 2021; FAO and WFP assessment results.

The FIES analysis is largely in line with the FCS results and the margins of errors overlap.²² The FIES suggests a higher prevalence of households facing moderate or severe food insecurity in rural areas (29.2 percent) compared to urban areas (24.2 percent) and identifies the states of Chin and Kayah as those facing the worst outcomes.²³ The FIES also identifies Rakhine as one of the states and regions facing the worst outcomes,²⁴ while Shan performed better under this metric, when compared to the prevalence of poor consumption in FCS analysis (but not with borderline).

Households were also asked about the number of meals consumed the day before the interview. As food insecure households tend to reduce the frequency of meals to cope with lack of food or money to buy food, this value can be triangulated with the other food security indicators. However, this indicator should not be interpreted as a proxy for the quantity of food consumed. Overall, more than half of the households (55 percent) consumed three or more meals, while 44 percent consumed only two meals.

²² Margins of error based on 90 percent confidence intervals and accounting for both sampling and measurement errors are reported in brackets.

²³ The “moderate and severe” and “severe” food insecurity estimates were determined according to the definition and the corresponding severity thresholds associated to food insecurity in the context of the global Sustainable Development Goals monitoring process.

²⁴ The analysis of the questions on the number of meals is consistent with the identification of the subgroups of the population that are facing the most severe food insecurity outcomes. For example, consuming two meals per day was much more common in Rakhine state (88 percent) than other areas.

Looking more in depth at food security estimates, some household characteristics were closely associated with both poor and borderline food consumption (Figure 33) and the recent FIES:

- Households with no income: 33 percent reported insufficient food consumption compared to 21 percent with main income derived from informal jobs, and 14 percent with main income derived from regular employment, and 49 percent faced severe/moderate food insecurity compared to 25 percent of households with an income.
- Households with higher income dependency ratio (equivalent of one income earner for more than four people): 25 percent had insufficient food consumption compared to 16 percent among households with low-income dependency (equivalent of one income earner supporting four or fewer people). Similarly, 23 percent of households with at least one child under five years of age had insufficient food consumption compared to 17 percent of households with no children under five.²⁵
- Agricultural households: Twenty percent of agricultural households reported insufficient food consumption compared to 17 percent among non-agricultural households. The FIES data supports these findings,²⁶ particularly for households living on livestock only, as the prevalence of moderate and severe food insecurity is 34 percent, compared to 29 percent of non-agricultural households.
- Recent IDPs, migrants, returnees: Twenty-three percent of these households had poor or borderline food consumption, compared to 19 percent among households with longer term/stable living arrangements. Moreover, among recent migrant, IDP and returnee households, fewer consumed three+ meals per day (45 percent) compared to those with longer term/stable living arrangements (56 percent).

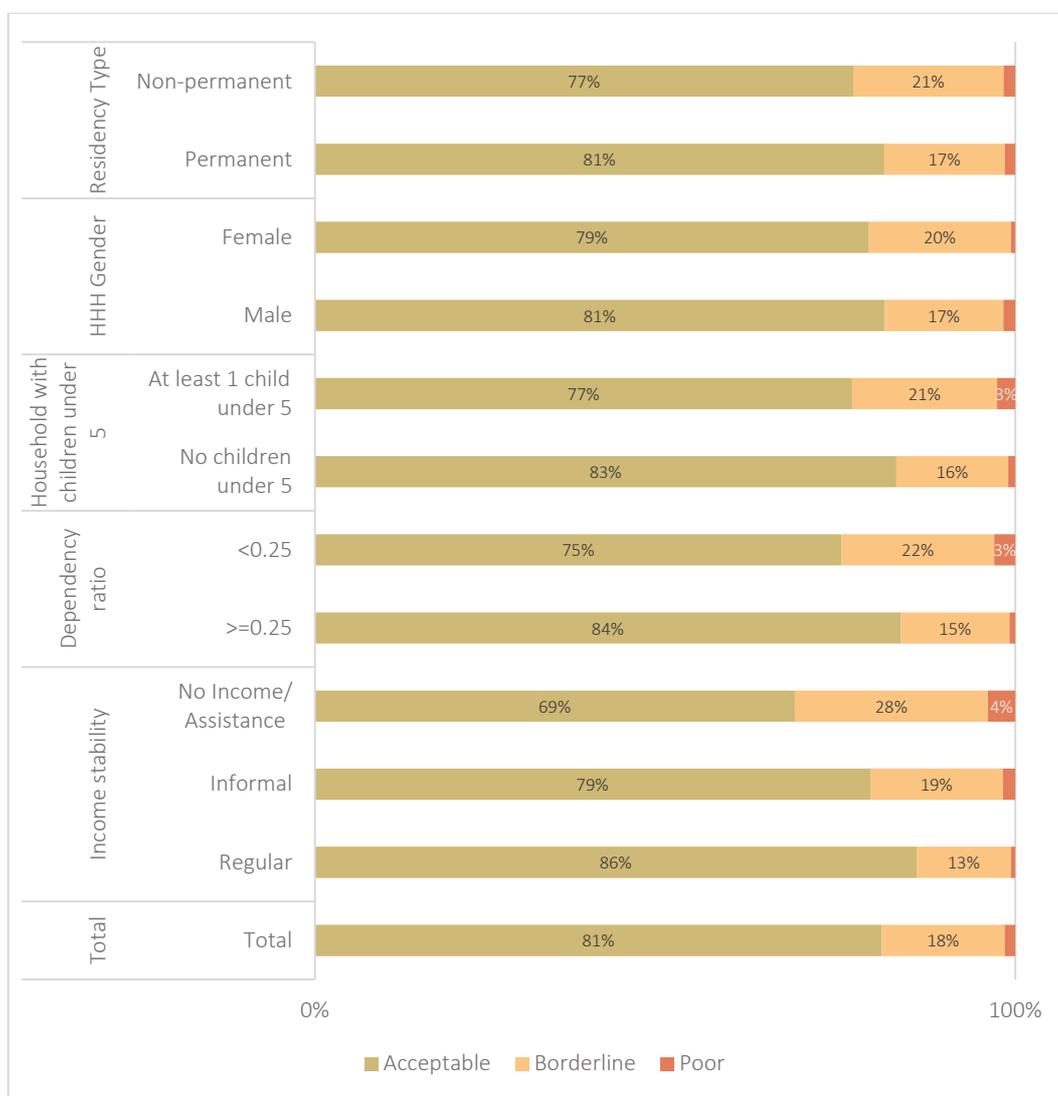
Even though the differences in food security estimates were statistically insignificant when comparing the genders of the head of household, considering the urban/rural setting, a worrisome picture emerges. In rural areas, 30 percent of female-headed households had insufficient food consumption compared to 7 percent of female-headed households in urban areas (Figure 34).²⁷

²⁵ The prevalence of severe and moderate recent food insecurity among households with children under five was 35 percent, compared to 24 percent of other households. Fewer households with at least one child under five years of age consumed three+ meals when compared to households with no children under five (48 percent versus 59 percent).

²⁶ Partially, as the prevalence of severe and moderate recent food insecurity was 25 percent among households engaged in farming.

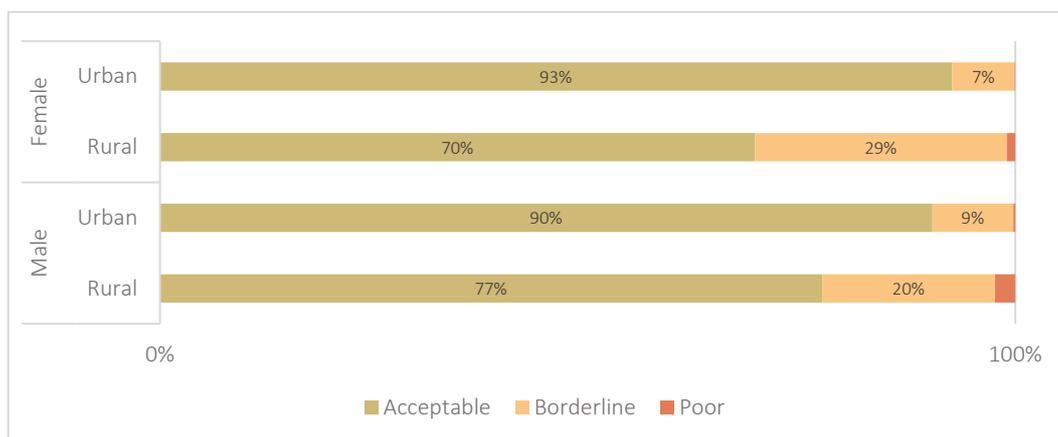
²⁷ The FIES analysis also differ with these results, but with a smaller gap – the prevalence of moderate and severe recent food insecurity among female-headed households was 29 percent in rural areas, compared to 23 percent in urban areas.

Figure 33. Percentage of household food consumption by key household characteristics



Source: FAO and WFP, 2021; FAO and WFP assessment results.

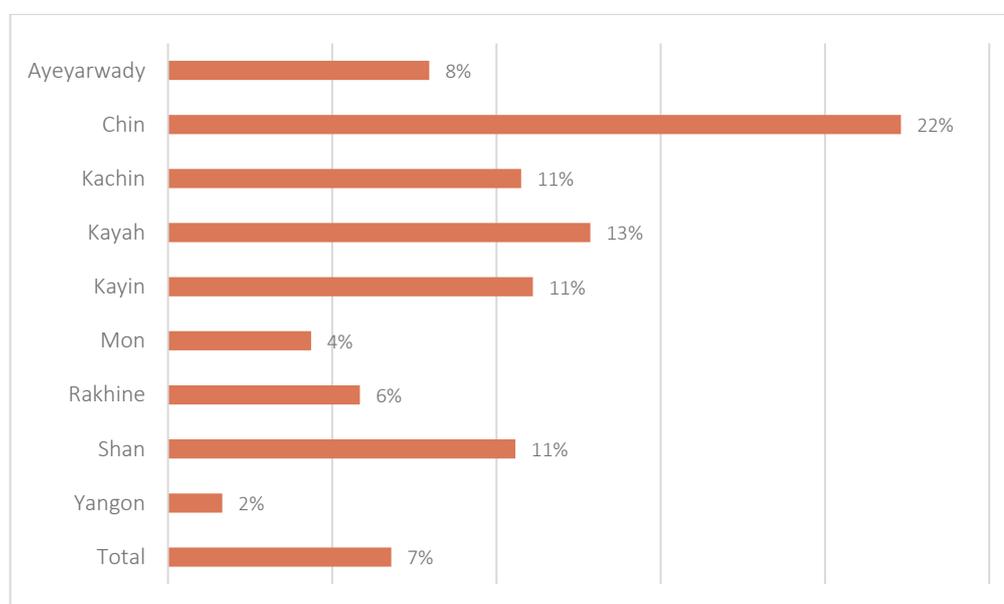
Figure 34. Percentage of female- vs. male-headed households in rural vs. urban areas by food consumption



Source: FAO and WFP, 2021; FAO and WFP assessment results.

Households were also asked about their physical access to markets. While only 7 percent reported no access to markets, there was considerable variation geographically. Access to food markets was found to be an important condition for food security: the prevalence of recent severe and moderate food insecurity (as per the FIES indicator) was 40 percent among households without access, and 27 percent among those with access. The proportion of households with insufficient consumption (borderline or poor consumption) was 27 percent among those without access compared to 18 percent for those who had access. In Chin, more than one in five households reported no access to a market. In Shan, Kachin, Kayin and Kayah states, 11–13 percent of households reported no access to markets (Figure 35). Moreover, 11 percent of recent IDP, migrants and returnee households reported no access. There was little difference in access to markets between agricultural and non-agricultural households, rural and urban households, female- and male-headed households or between households with children under five years of age and those without.

Figure 35. Percentage of households with no access to markets by location



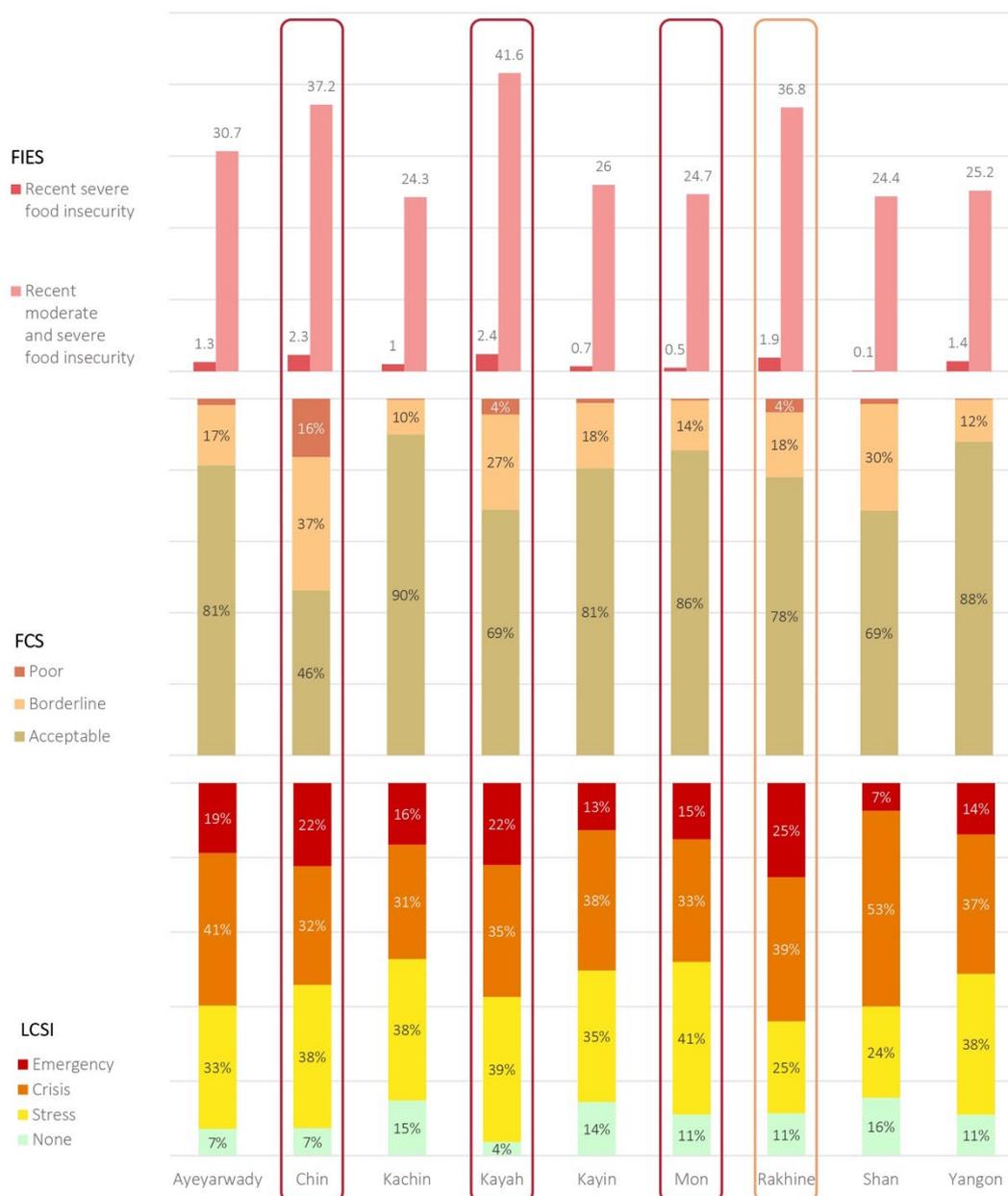
Source: FAO and WFP, 2021; FAO and WFP assessment results.

Financial access to food is a function of household purchasing power, which is affected by income level and stability, living expenses, and retail food prices, among other factors. The survey asked households to estimate the share of expenditure on food with 34 percent reporting a share of expenditures on food greater than 70 percent. This was higher in rural areas (36 percent) compared to urban areas (29 percent), and higher in Shan, Mon and Rakhine states (41 percent, 39 percent and 38 percent) compared to other states and regions. However, share of expenditure on food was not a significant predictor of inadequate food consumption.

Most affected population groups and needs

Despite the limitations of comparing results with those of 2020, data suggest a deterioration of food production, access and consumption. Geographically, the states and regions that are facing the worst outcomes are Chin, Kayah and Rakhine. These areas reported higher rates of crisis and emergency coping strategies, inadequate food consumption, and recent food insecurity as measured by the FIES (Figure 36). A higher percentage of households from these areas cited shocks, planting and harvesting less, and difficulties in agricultural marketing.

Figure 36. Comparison of food security indicators by location



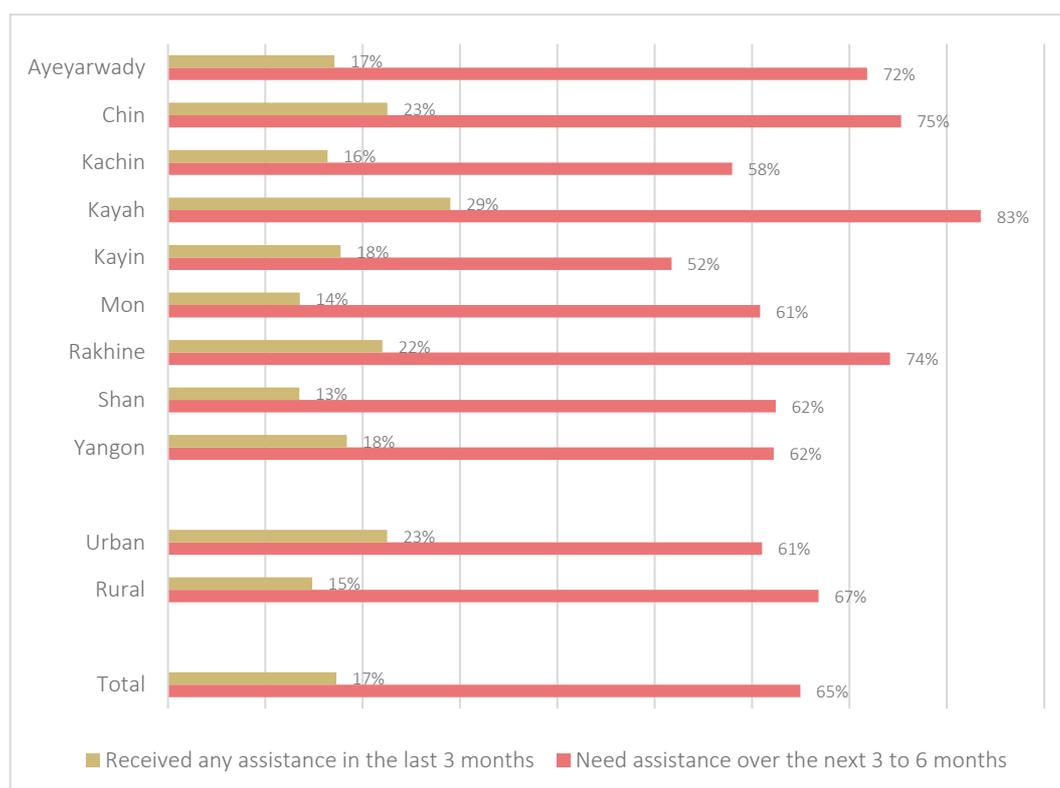
Source: FAO and WFP, 2021; FAO and WFP assessment results.

Vulnerable populations that were also highly affected by food insecurity in the current set of interviews, as measured by food consumption and recent food insecurity (FIES), context were households with no income, those with a higher income dependency ratio, households with at least one child under 5 years of age, and recent migrant, IDP and returnee households. In addition, the data points to higher prevalence of food insecurity among rural and agricultural households.

Households were asked whether they had received any assistance in the three months prior to the interview and whether they needed assistance over the next three to six months. Overall, only 17 percent of households received some sort of assistance in the three months preceding the survey (Figure 37), and as much as 65 percent of households needed assistance. These responses reflect a gap between assistance provided and assistance needed, and suggest that humanitarian assistance and livelihood protection must be scaled up in the short term. Food, cash and medical services/supplies were the most frequently requested types of assistance (58, 55 and 14 percent respectively). However, different subgroups had different priorities, depending on livelihoods. For example, after cash and food, the most requested type of assistance among crop producers was fertilizer and seeds (14 percent).

The highest proportion of households who reported needing assistance were in Kayah (83 percent), Chin (75 percent) and Rakhine (74 percent), further confirming the high vulnerability of households in these states.

Figure 37. Proportion of households that received assistance in the three months preceding the survey, and the proportion of households that reported a need for assistance in the subsequent three to six months by location and rural/urban



Source: FAO and WFP, 2021; FAO and WFP assessment results.

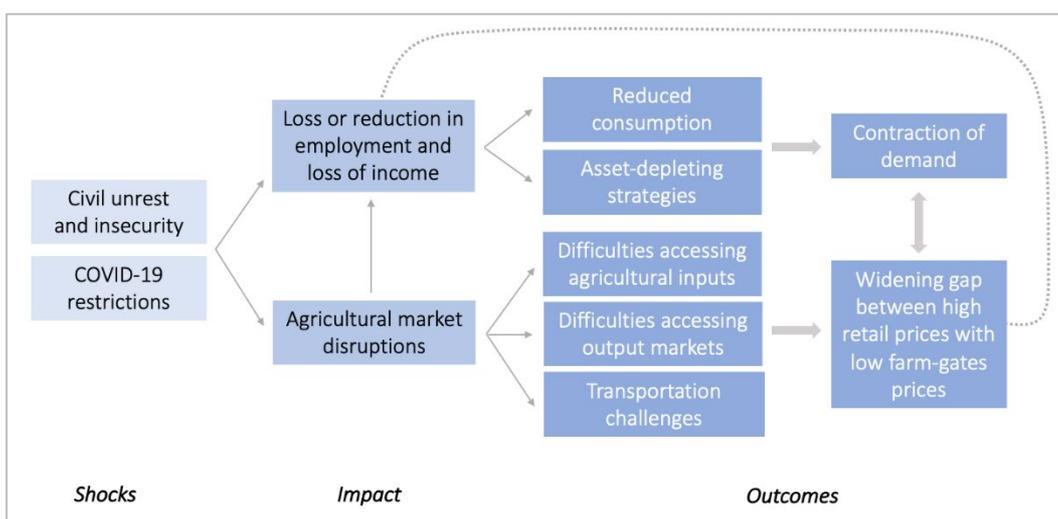
Conclusion

The successive waves of COVID-19 and the further deterioration and near-collapse of economic, political, and social conditions in Myanmar following the military takeover and subsequent intensification of conflict, have caused widespread disruption of livelihoods. Most of the shocks reported by households are economic in nature, such as the loss of employment, closure of businesses and high food prices. The impact of these shocks on households can be seen in the rise of the use of livelihood coping strategies and in the deterioration of household food consumption.

The series of shocks affected households in different ways depending, in large part, on their livelihood (Figure 38). Food consumption was particularly affected by the deterioration of purchasing power (decrease in income and soaring food prices), resulting in assets-depletion and food consumption gaps. Food production was affected by challenges in accessing agricultural inputs due to the disruption in input marketing and by the decrease in agricultural production (associated with the retrenchment of the farmed area), and by the challenges in commodity marketing.

Results suggest that agricultural markets have not been spared by the effects of the crises, resulting in a reduction of farmer income, disruptions of supply chains and high prices. It is difficult to attribute direct causes to this outcome, but data consistently points to the inter-play of different factors, such as the deterioration of the exchange rate, violence and civil unrest, market closure, challenges faced by the banking system, and less demand for some products in the surveyed areas.

Figure 38. Problem model



Source: FAO and WFP, 2021; FAO and WFP assessment results.

Food security outcomes, FCS, Livelihood Coping Strategy Index and FIES are consistent in identifying Chin, Kayah and Rakhine as the largest geographic areas of concern among the nine states and regions surveyed. Shan is also of concern, particularly due to the high prevalence of households with no income or who rely mainly on assistance and remittances.

Prior to the COVID-19 pandemic and the military takeover, Chin and Rakhine were two of the most vulnerable states and regions in Myanmar with the highest poverty rates (United Nations Development Programme, 2021). Household vulnerability was further exacerbated and the capacity to access adequate diets has been in distress. In recent months, Chin and Kayah have been heavily affected by the intensification of insecurity and conflict, which may have resulted in widespread displacement, particularly in relation to their small overall population sizes (UNHCR, 2021a; ACLED, 2021). In these three states, the high share of households reporting high food prices as a shock and of agricultural producers indicating low selling prices suggest that the gap between incomes (both agricultural and non-agricultural) and market prices might be particularly wide, limiting household access to a nutritious diet.

Recommendations

Concerns for food availability call for immediate humanitarian assistance to address food consumption gaps and emergency livelihood support for the most affected households, particularly:

- in the most conflict affected areas, such as Chin, Kayah, Mon and Rakhine;
- displaced people (new and prolonged) and for communities who have lost access to their livelihoods and/or who do not have access to markets due to conflict; and
- households that present one or more of the key vulnerability characteristics: households with children under five, households with reduced/no income or informal jobs, high income dependency, and female-headed households.

Covering the same geographical areas, emergency agriculture support is recommended to recover vital crop and livestock production, to rebuild assets, and to improve access to agricultural inputs given the scale of the deterioration of food insecurity and the economic shock.

Moreover, it is recommended to:

- use cash and voucher assistance in areas where markets are functioning to encourage crop production and stabilize market supply by increasing the demand for agricultural products;
- maintain and strengthen existing price and market monitoring activities; and
- continue food security monitoring in rural and urban areas to assess changes over time.

References

- ACLED.** 2021. Curated data for Southeast Asia. In: *Armed Conflict Location & Event Data Project (ACLED)*. Cited April 2022. acleddata.com
- ADB (Asia Development Bank).** 2021. Myanmar and ADB. In: *ADB*. Manila. Cited January 2022. adb.org/countries/myanmar/economy
- Cafiero, C., Viviani, S. & Nord, M.** 2018. *Food security measurement in a global context: The food insecurity experience scale. Measurement, 116 (2018): 146-152.* Rome. Cited January 2022. <https://doi.org/10.1016/j.measurement.2017.10.065>
- Central Statistics Organization of Myanmar, UNDP & the World Bank.** 2019. *Myanmar Living Conditions Survey 2017: Report 03 – Poverty report.* Nay Pyi Taw. Cited January 2022. <https://documents1.worldbank.org/curated/en/921021561058201854/pdf/Myanmar-Living-Condition-Survey-2017-Report-3-Poverty-Report.pdf>
- FAO.** 2021. Country briefs – Myanmar. In: *FAO GIEWS – Global Information and Early Warning System.* Rome. Cited January 2022. fao.org/giews/countrybrief/country.jsp?code=MMR
- FAO & WFP.** 2021. *Myanmar | Agricultural livelihoods and food security in the context of COVID-19: Monitoring report – May 2021.* Rome. <https://doi.org/10.4060/cb5218en>
- Crisis24.** 2021. Myanmar: Officials extend COVID-19 international entry restrictions through Nov. 30 /update 45. In: *Crisis24.* Montreal. Cited 30 November 2021. garda.com/crisis24/news-alerts/541066/myanmar-officials-extend-covid-19-international-entry-restrictions-through-nov-30-update-45
- IFPRI.** 2021a. *Community perceptions of changes in rural livelihoods since onset of COVID-19 in Myanmar: Insights from round 7 of the National COVID-19 Community Survey (NCCS) – May 2021.* Washington, DC. <https://doi.org/10.2499/p15738coll2.134448>
- IFPRI.** 2021b. *Monitoring the agrifood system in Myanmar: Agricultural input retailers – September 2021 survey round.* Washington, DC. <https://doi.org/10.2499/p15738coll2.134693>
- IMF (International Monetary Fund).** 2021. *World Economic Outlook October 2021: Recovery during a pandemic – health concerns, supply disruptions, and price pressures.* Washington, DC. imf.org/en/Publications/WEO/Issues/2021/10/12/world-economic-outlook-october-2021

MLIP (Ministry of Labour, Immigration and Population). 2017. *The 2014 Myanmar Population and Housing Census: Thematic Report on Children and Youth, Census Report Volume 4-M*. Nay Pyi Taw. myanmar.unfpa.org/sites/default/files/pub-pdf/4M_Children%20and%20Youth.pdf

MoHS (Ministry of Health and Sports) and ICF. 2017. *Myanmar Demographic and Health Survey 2015-16*. Nay Pyi Taw, Myanmar, and Rockville, Maryland USA: Ministry of Health and Sports and ICF. dhsprogram.com/pubs/pdf/FR324/FR324.pdf

Trading Economics. 2021. *Myanmar Kyat Summary*. In: *Trading Economics*. Cited January 2022. tradingeconomics.com/myanmar/currency

UNDP (United Nations Development Programme). 2021. *Impact of the twin crises on human welfare in Myanmar, November 2021*. Yangon, Myanmar. asia-pacific.undp.org/content/rbap/en/home/library/sustainable-development/impact-of-twin-crisis-on-human-welfare-in-myanmar.html

UNHCR (United Nations High Commissioner for Refugees). 2021a. *Myanmar Emergency Update as of 15 September 2021*. Bangkok. data2.unhcr.org/fr/documents/details/88715

UNHCR. 2021b. *Myanmar Emergency Update as of 17 December 2021*. Bangkok. data2.unhcr.org/es/documents/details/90133

World Bank. 2021. *Myanmar Economic Monitor July 2021: Progress Threatened; Resilience Tested*. Washington, DC. Cited January 2022. worldbank.org/en/country/myanmar/publication/myanmar-economic-monitor-july-2021-progress-threatened-resilience-tested

Worldometer. 2021. Myanmar Coronavirus Cases. In: *Worldometer*. Cited 27 October 2021. worldometers.info/coronavirus/country/myanmar/

Worldometer. 2022. Myanmar Coronavirus Cases. In: *Worldometer*. Cited 31 March 2022. worldometers.info/coronavirus/country/myanmar/



USAID
FROM THE AMERICAN PEOPLE

This report is made possible by the support of the American People through the United States Agency for International Development (USAID). The contents of this report are the sole responsibility of the Food and Agriculture Organization of the United Nations and World Food Programme and do not necessarily reflect the views of USAID or the United States of America Government.

Contact

WFP Myanmar Country Office
almudena.serrano@wfp.org | [wfp/countries/myanmar](https://wfp.org/countries/myanmar)
Nay Pyi Taw, Myanmar

FAO Representation in Myanmar
FAO-MM@fao.org | fao.org/myanmar
Nay Pyi Taw, Myanmar

Office of Emergencies and Resilience
OER-Director@fao.org | fao.org/emergencies
Rome, Italy

**Food and Agriculture Organization of the United Nations
and World Food Programme**

ISBN 978-92-5-136425-3



9 789251 364253

CC0562EN/1/06.22