**Commercial Transport Report**

**Market Analysis Unit (MAU)**

The MAU monitors transport routes to track the flow of commercial goods between major towns and border crossings. Data are based on KIIs with market actors. Some route depictions may not be exact. Reports are available online at [www.themimu.info/market-analysis-unit](http://www.themimu.info/market-analysis-unit).

<table>
<thead>
<tr>
<th>#</th>
<th>Route (point A - point B)</th>
<th>Route Status as of May 2022 (compared to Jan. 2021)</th>
<th>Closures</th>
<th>Commercial Volume</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Change</td>
<td>Total</td>
</tr>
<tr>
<td>1</td>
<td>Shadaw - Hsihseng (Shan) via Ka Du Gyi</td>
<td>Shadaw's only supply route. Goods come from Shan State.</td>
<td>Frequent</td>
<td>—</td>
</tr>
<tr>
<td>2</td>
<td>Shadaw - Loikaw via Pan Chaung</td>
<td>Closed from recent infrastructure damage. No longer Shadaw's main supply route.</td>
<td>Long-term</td>
<td>▼</td>
</tr>
<tr>
<td>3</td>
<td>Loikaw - Hsihseng (Shan) via Loilen Lay</td>
<td>New main supply route for Loikaw. Goods come from Shan State.</td>
<td>Frequent</td>
<td>▼</td>
</tr>
<tr>
<td>4</td>
<td>Loikaw - Pinlaung (Shan) via Pekon</td>
<td>Now secondary supply route for Loikaw (previous main route). Goods come from Shan State.</td>
<td>Frequent</td>
<td>▼</td>
</tr>
<tr>
<td>5</td>
<td>Loikaw - Hpruso via Daw Ta Dar</td>
<td>Closed from recent infrastructure damage. Previously a backup village route to Hpruso.</td>
<td>Long-term</td>
<td>▼</td>
</tr>
<tr>
<td>6</td>
<td>Loikaw - Law Pi Ta</td>
<td>Main supply route for Law Pi Ta. Previously rarely used.</td>
<td>Frequent</td>
<td>▼</td>
</tr>
<tr>
<td>7</td>
<td>Law Pi Ta - Bawlake via Daw Ta Ma Gyi</td>
<td>Northern supply route to Bawlake. Previously a backup route only. Detour option passes via Daw Ta Dar.</td>
<td>Frequent</td>
<td>—</td>
</tr>
<tr>
<td>8</td>
<td>Demoso - Loikaw</td>
<td>Closed from recent infrastructure damage. Previously Demoso's main supply route.</td>
<td>Long-term</td>
<td>▼</td>
</tr>
<tr>
<td>9</td>
<td>Demoso - Pinlaung (Shan) via Long Pyin</td>
<td>Closed from recent infrastructure damage. Previously rarely used.</td>
<td>Long-term</td>
<td>▼</td>
</tr>
<tr>
<td>10</td>
<td>Demoso - Taungoo (Bago) via Leiktho</td>
<td>Closed from recent infrastructure damage. Previously rarely used.</td>
<td>Long-term</td>
<td>▼</td>
</tr>
<tr>
<td>11</td>
<td>Hpruso - Demoso</td>
<td>Closed from recent infrastructure damage. Previously main supply route for Hpruso.</td>
<td>Long-term</td>
<td>▼</td>
</tr>
<tr>
<td>12</td>
<td>Hpruso - Bawlake</td>
<td>Closed from recent infrastructure damage. Previously main supply route for Bawlake.</td>
<td>Long-term</td>
<td>▼</td>
</tr>
<tr>
<td>13</td>
<td>Bawlake - Hpasawng</td>
<td>Main supply route for Bawlake during monsoon. Goods come from Thailand.</td>
<td>Frequent</td>
<td>▼</td>
</tr>
<tr>
<td>14</td>
<td>Bawlake - Ywarthit</td>
<td>Main supply route for Bawlake during summer/winter. Goods come from Thailand.</td>
<td>Rare</td>
<td>▼</td>
</tr>
<tr>
<td>15</td>
<td>Ywarthit - Mae Hong Song</td>
<td>Main supply route for Ywarthit. Goods come from Thailand.</td>
<td>Frequent</td>
<td>▼</td>
</tr>
<tr>
<td>16</td>
<td>Ywarthit - Kayan Village</td>
<td>Secondary supply route for Ywarthit. Goods come from Thailand.</td>
<td>Frequent</td>
<td>▼</td>
</tr>
<tr>
<td>17</td>
<td>Hpasawng – Baw Ga Li (Kayin) via Maw Chi</td>
<td>Longstanding closure. Rarely used in the past.</td>
<td>Long-term</td>
<td>▼</td>
</tr>
<tr>
<td>18</td>
<td>Hpasawng – Hpaupun (Kayin) via Khe Phyu</td>
<td>Longstanding closure. Rarely used in the past.</td>
<td>Long-term</td>
<td>▼</td>
</tr>
<tr>
<td>19</td>
<td>Hpasawng – Mese</td>
<td>Now Hpasawng’s main supply route. Goods come from Thailand.</td>
<td>Frequent</td>
<td>▼</td>
</tr>
<tr>
<td>20</td>
<td>Mese – Mae Ngao</td>
<td>Main supply route for Mese. Goods come from Thailand.</td>
<td>Rare</td>
<td>▼</td>
</tr>
<tr>
<td>21</td>
<td>Mese – Sao Hin</td>
<td>Secondary supply route for Mese. Goods come from Thailand.</td>
<td>Rare</td>
<td>▼</td>
</tr>
</tbody>
</table>

**Table Notes:** (1) Light-grey route names indicate long-term closure.
Closures and Checkpoints
Most routes between major towns in the north are closed indefinitely, although routes in the south are generally open. Routes serving Demoso and Hpruso have closed due to recent infrastructure damage and/or ongoing conflict, as has the route between Loikaw and Shadaw. Repairs have reopened routes in some cases, but the use of poor-quality backup routes is common. In the south, routes near the Thai border are generally open, but routes between Bawlake and Mese close periodically. Checkpoints are ubiquitous in towns and many intermediary villages.

Route Dynamics
Transport in the state increasingly relies on local village routes which may shift often. In the north, closures (or fear of danger) have led to the adoption of local detours which shift regularly. The closure of the Loikaw-Hpruso highway has also shifted southbound transport to village routes. As a result, Bawlake receives more goods via Hpasawng in monsoon when the Thanlwin River is not crossable at Ywarthit.

Source and Volume of Goods
South Shan State remains the main source of supply for the north, while Thai imports now supply the south. Route closures around Demoso and Hpruso divide supply to Kayah State into northern and southern halves. The three northern townships of Loikaw, Demoso and Shadaw receive supply from South Shan State via Pinlaung and Hsihseng. In the past, many goods arrived via Pinlaung, but Hsihseng is now a more common source of supply. The south used to receive supply from Loikaw District but now relies on border trade with Thailand.

Transport volumes are generally low on routes in the south and low or nonexistent in the north. As a result, Bawlake receives more goods via Hpasawng in monsoon when the Thanlwin River is not crossable at Ywarthit.

Some routes shift during monsoon when roads are closed or impeded by weather. Routes to Shadaw, Ywarthit and Mese involve river-crossings that are impossible or unsafe in heavy rain. These routes are generally impassable by car and rely on boat-transfers. As a result, Bawlake receives more goods via Hpasawng in monsoon when the Thanlwin River is not crossable at Ywarthit.

Route Quality
Route quality is often poor in Kayah State and has deteriorated further in the past year. Extensive damage to infrastructure (e.g., bridges) has degraded many routes in the north, particularly those surrounding Loikaw, Demoso and Hpruso. Some routes may not be passable even absent armed conflict. In the south, route quality is more...
of a concern on minor roads near the Thai border which may be unsafe in monsoon season. While much road infrastructure remains open and intact in the south, border trade is vulnerable to weather conditions due to poor route quality.

**Implications**

- **Recent infrastructure damage will continue to limit transport, even in stable conditions.** Damaged roads and bridges will hamper transport around Loikaw, Demoso and Hpruso even if the security situation improves;
- **Prices and availability of essential goods will differ significantly in the north and south.** Supply from South Shan State and Thailand will likely result in different prices and availability;
- **Southern Kayah State may face supply constraints in monsoon season when routes close.** As monsoon rains restrict poor-quality routes to the Thai border supply options will be fewer.

**Route Indicators**

**Indicators are estimated based on KII. They are intended to provide a qualitative impression rather than exact measures.**

  - Rare - Closed less than twice per year
  - Occasional - Closed 2-5 times per year
  - Frequent - Closed 6 or more times per year
  - Long-term - Closed indefinitely

  - ▲ Increased
  - ▼ Decreased

- **Volume (total)** – Current commercial volume on route, relative to routes in Jan. 2021. Excludes raw materials and illicit trade (e.g., timber, drugs).

  - ●●● High
  - ●● Medium
  - ● Low
  - ○ Almost none

- **Volume (direction)** – Portion of volume in each direction (null if volume is “almost none”).

- **Mode** – Route modality (e.g., road, waterway).

- **Distance** – Route length, measured as hours of travel by standard car/boat (incl. checkpoints). Travel times vary; this is intended only as a rough measure of relative distance.

- **Quality** – Route quality in dry season based on infrastructure, relative to elsewhere in state.

  - ★★★★ Very good
  - ★★★ Good
  - ★★ Poor
  - ★ Very poor

- **Monsoon Condition** – Route conditions in monsoon season.

  - → Good - Stable in monsoon
  - → Variable - Weather-dependent
  - → Poor - Poorer in monsoon
  - X Closed - Closed in monsoon

**Market Analysis Unit (MAU)**

The Market Analysis Unit provides development practitioners, policymakers and private sector actors in Myanmar with data and analysis to better understand the impacts of Covid-19, conflict and other crises on:

- Household purchasing power, including coping mechanisms, safety nets and access to basic needs;
- Supply chains, including trade, cross-border dynamics and market functionality (particularly as it relates to food systems);
- Financial services, including financial services providers, household and business access to finance and remittances; and
- Labor markets (formal and informal), with a focus on agricultural labor and low-wage sectors (e.g., construction, food service).

**CONTACT**

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Jon Keesecker and Saw Htoo contributed to the design, analysis, writing and data visuals of this report.