CHIN STATE (FEB. 2022)

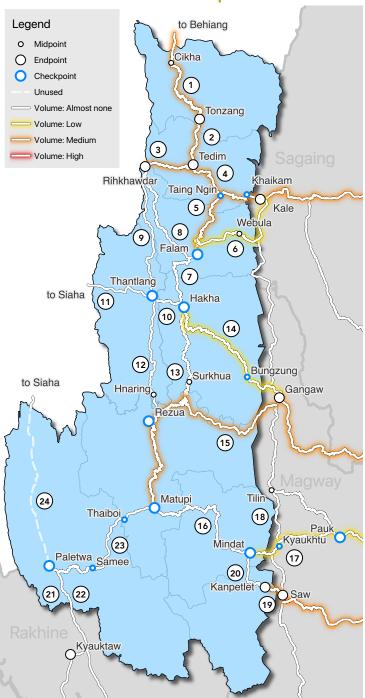
COMMERCIAL TRANSPORT REPORT

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.

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Current Route Dynamics

Commercial transport volumes are higher in the northern district of Falam and lower on most routes in Hakha and Mindat Districts. Many key arteries in Chin State now see low or medium volume (e.g., near Tedim and Falam), and those in the center and south of the state see almost none (e.g., near Thantlang, Matupi, Mindat). Conflict continues to disrupt transport, and checkpoints in more than a dozen locations across the state often prevent, detour or delay transport of commercial goods. Transit is mostly inbound, with few goods leaving the state.

Route Changes (since Jan. 2021)

Increased armed conflict since February 2021 has reduced transport volumes throughout the state. Commercial transport volumes are down on more than half of major transport routes in Chin State, in both the north and south. Declines in volume are naturally most common near main towns, particularly Mindat. This has also led to modest volume increases on some alternative routes (e.g., near Falam, Matupi, Paletwa). Most commercial transport was already inbound prior to February 2021, but this is even more true now, likely due to fewer outbound goods.

The relative importance of some commercial routes has shifted in the past year due to conflict risk. As fewer goods come from Mindat, Matupi now relies on a much longer route via Gangaw. Due to conflict in the north, Falam increasingly receives goods from Kale on a checkpoint-free backup route via Webula.

Implications

- Goods transport will remain hard statewide.
 Particularly in Thantlant, Matupi, and Mindat.
- Monsoon impacts may be felt most at border crossings and north-south connectors.

Permanent Route Features

•	Route (Point A - Point B)	Mode	Distance (Hrs)	Quality	Monsoon Condition
1	Tonzan - Behiang (India) via Cikha	Road	5	*	\searrow
2	Tonzan - Tedim	Road	2	***	\longrightarrow
3	Tedim - Rihkhawdar	Road	4	**	\rightarrow
4	Tedim - Kale (Sagaing)	Road	4	***	\rightarrow
5	Falam - Kale (Sagaing) via Lungbang/Khaikam	Road	4	***	\rightarrow
6	Falam - Kale (Sagaing) via Webula	Road	6	**	\rightarrow
7	Falam - Hakha	Road	2	***	\longrightarrow
8	Falam - Rihkhawdar	Road	4	**	-→
9	Thantlang - Rihkhawdar	Road	5	*	\searrow
10	Thantlang - Hakha	Road	1	**	\longrightarrow
11	Thantlang - Siaha (India) via Sangua	Road	9	*	×
12	Thantlang - Rezua via Hnaring	Road	5	***	- →
13	Hakha - Rezua via Surkhua	Road	7	*	- →
14	Hakha - Gangaw (Magway)	Road	4	**	\longrightarrow
15	Matupi - Gangaw (Magway) via Rezua	Road	12	***	-→
16	Matupi - Mindat	Road	6	***	\rightarrow
17	Mindat - Pauk (Magway)	Road	3	**	\longrightarrow
18	Mindat - Gangaw (Magway) via Kyaukthu/ Htilin	Road	5	***	\rightarrow
19	Kanpetlet - Saw (Magway)	Road	1	***	\longrightarrow
20	Kanpetlet - Mindat	Road	2	***	\longrightarrow
21	Paletwa - Kyauktaw (Rakhine) waterway	Water	4	***	\rightarrow
22	Paletwa - Kyauktaw (Rakhine) roadway	Road	3	**	\rightarrow
23	Paletwa - Matupi via Samee/Thaiboi	Road	12	**	\searrow
24	Paletwa - Siaha (India) via Zorinpui	N/A	N/A	N/A	N/A

Routes may shift further as transporters adapt to conflict and checkpoints. However, limited road networks will place hard limits on adaptation and increase motorcycle reliance.

Route Indicators

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

Volume (total) – Commercial volume on route, relative to routes in the state. Excludes raw materials and illicit trade (e.g., timber, drugs).

Almost none

• Low

• • Medium

••• High

Volume (direction) – Portion of volume in each direction (null if volume is "almost none").

A to B B to A

Distance – Route length, measured as hours of travel by standard car/boat. 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 poor

★★★★ Poor ★★★★ Medium

★★★★ High

Monsoon Condition – Route conditions in monsoon season.

★ Closed - closed in monsoon

Poor - worse in monsoon

− → Variable - weather dependent

→ Good - stable in monsoon

Checkpoints – Checkpoints or outposts on route (belonging to any party) which regulate the transport of goods.





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).

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ACKNOWLEDGEMENTS