

Rapid Market Assessment

This Rapid Market Assessment (RMA) is a supplement to the MAU Market Price Report in Southeast Myanmar. It provides township-level data on market functionality, activity, supply, and logistics. Data were collected through observation and KIIs with retailers during June 20–25, 2024. Reports available at www.themimu.info/market-analysis-unit.

KEY FINDINGS

- **Markets were relatively safe and stable in June**, but Kawkareik village market remained unsafe;
- **Retail activity grew again in Myawaddy**, and some retailers in Kawkareik relocated due to conflict;
- **Food and NFI supply dipped in Hpa-An**, and Hlaingbwe retailers struggled to order from suppliers there;
- **Supply was good in Hpayarthonesu** where there is cross-border trade, but it was poor in Kyainseikgyi;
- **Shipping costs rose regionally**, and retailers said monsoon weather often damaged inventory;
- **Transportation and supply posed challenges** in June as movement of goods remained challenging.



Regional Overview

Market Functionality - Market operations were stable in June, and most markets were open throughout the day. Markets remained open and generally free from closures or damage in June. Security conditions improved in/around Hlaingbwe market, and observers said conditions were generally safe at five of six markets monitored (all towns); conditions remained unsafe at the Kawkareik village market.

Market Activity - Customer activity was fairly stable, but retail activity grew in Myawaddy and Kawkareik. More retailers returned to Myawaddy Town market in June, and Kawkareik retailers shifted locations in step with recent displacement patterns. Beyond Kawkareik, both retailer and customer activity was largely stable in June.

Availability of Goods - Supply remained fairly good in the region, but supply worsened in Hpa-An. Fuel and medicines remained more scarce than other goods, and local restrictions continued to complicate supply of essential foods like rice. Supply worsened across category types in Hpa-An town market, but elsewhere it was fairly stable. Supply was better-than-average in Hpayarthonesu (monitored for the first time this month) but it was poorer further north in Kyainseikgyi.

Transport & Logistics - Shipping costs increased across the region in June, but they were stable in Hpayarthonesu. Formal shipping across township lines remained intact in June, although poor monsoon-season logistics resulted in higher costs and increased damage to inventory along the way. Shipping lead-times were relatively short and did not grow much further in June, although retailers noted that shipping goods between Yangon and Hpa-An took a lengthy seven days.

Retailer Challenges - Retailers struggled to access supply and maintain inventory. Retailers in Kawkareik and Hlaingbwe reported fewer retailer challenges in June than in May, in part due to better sales. Market damage was not a great concern in June, and safety/security concerns waned as well; retailers worried most about transportation and supply.

What to Watch

- Further rain and limited choice in suppliers suggests that inventory **damage** may continue;
- Market dynamics/locations in **Kawkareik** may shift further in July in response to security developments;
- Supply in **Hpa-An** should be watched closely as it remains an important regional trade hub.

Hlaingbwe Township

Town Market

Suppliers struggled to fill orders from Hlaingbwe Town, and medicine and essential food supply worsened. Hlaingbwe market remained operational in June, and observers said market security improved. Nonetheless, customer activity remained low since May. Overall supply remained relatively good, but supply of medicines and essential foods worsened. Suppliers in Hpa-An were sometimes unable to fill orders, and shipping costs were rising. Challenges related to weak demand and poor cash access diminished in June, while supply remained the greatest difficulty.

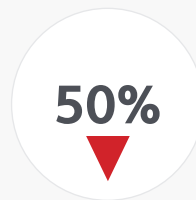


Market Functionality - Market hours were stable in Hlaingbwe Town and there was no recent market damage. Observers said security in/around Hlaingbwe market improved in June.

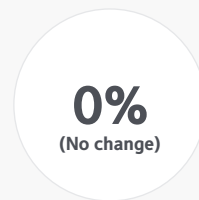
- **Opening Hours:** 5am-6pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Market activity in Hlaingbwe Town remained slightly muted after declining in May, although customers still arrived from nearby villages.

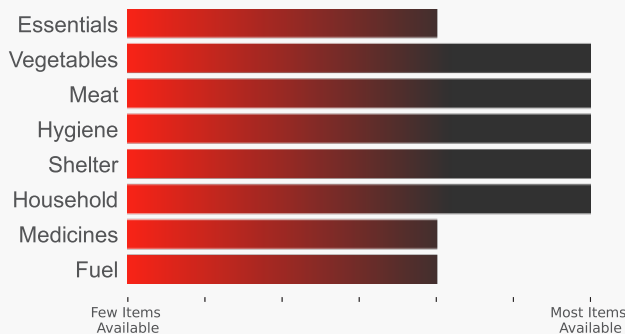
Customers



Retailers



Availability of Goods - Supply of medicine and essential foods worsened slightly in June, but overall supply was very good in Hlaingbwe Town. Supply of packaged foods items was irregular.



Scarce Items

- *Packaged foods*

Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Hpa-An.
- **Lead Time:** 1 day.
- **Shipping Costs:** Rising.
- **Example Rates:**



50kg Rice Bag
2,200 MMK
(from Hpa-An)



Small Car
50,000 MMK
(from village)



Small Truck
150,000 MMK
(from village)



Small Boat
-

Retailer Challenges - Poor supply remained retailers' greatest challenge in June, and some retailers said suppliers could not satisfy their orders. Concerns about transportation also grew. Weak demand and poor cash access remained difficulties for retailers but less so than in May.



Hpa-An Township

Town Market

Supply of various foods and NFIs worsened in June, but market functions and activity were mostly stable.

Hpa-An market operations were stable in June, and customer activity was stable but elevated. Supply of various foods and NFIs worsened slightly. Goods like rice, cooking oil, and fuel were harder to acquire, although most shelter NFIs were available. Thaton remained a key supplier but shipping costs were rising. Retail challenges were unchanged in June and remained diverse. Retailers continued to struggle most with poor security, transportation, and supply.

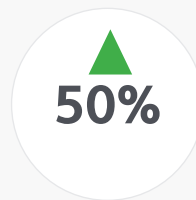


Market Functionality - Market hours were stable in Hpa-An Town, and the market area remained safe. Observers reported little change in market functions in Hpa-An Town in June.

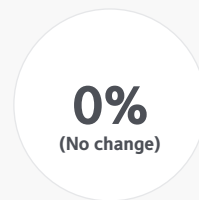
- **Opening Hours:** 6am-5:30pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous month.

Market Activity - Regional customers continued to frequent the Hpa-An market in June, but there here was little change in market activity.

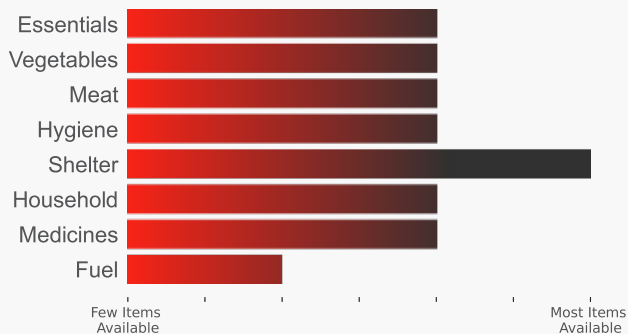
Customers



Retailers



Availability of Goods - Supply of most foods and NFIs worsened slightly in Hpa-An Town, although many items were still available. Fuel remained most scarce, but rice, cooking oil and other items became more scarce.



Scarce Items

- Rice
- Cooking oil
- Meat/fish
- Packaged foods
- Fuel

Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Thaton.
- **Lead Time:** 1 day.
- **Shipping Costs:** Rising.
- **Example Rates:**



50kg Rice Bag
2,000 MMK
(from Thaton)



Small Car
300,000 MMK
(from village)

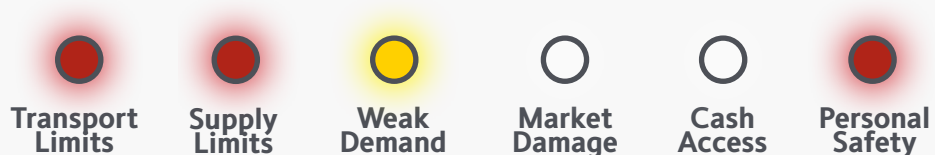


Small Truck
400,000 MMK
(from Thaton)



Small Boat
-

Retailer Challenges - Retail challenges remained mostly the same in June, as safety, transportation, and supply continued to be the greatest challenges. Concerns about weak demand remained as well, while worries about cash access were notably absent.



Kawkareik Township

Village Market

Village market activity grew in June and supply was fairly good, but many retail challenges remained. Conditions in the village market remained unsafe in June, but retailer activity grew in anticipation that recent displacement might soon swell customer numbers; customers continued to arrive from neighboring villages but at stable levels. Supply of shelter NFIs worsened slightly in June, but supply was overall good. Shipping costs rose again in June as transportation remained a major challenge. Poor supply and cash access were still retailers' biggest challenges, and worries about demand receded somewhat.

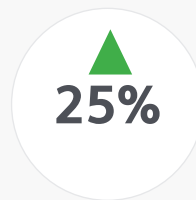


Market Functionality - The village market was open during mornings, and hours were stable. There was no recent damage or closures, but observers said the local market environment remained unsafe.

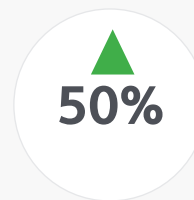
- **Opening Hours:** 5am-11am, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous month.

Market Activity - Retailer activity grew in anticipation that newly-displaced households would boost demand, but customer demand grew only slightly.

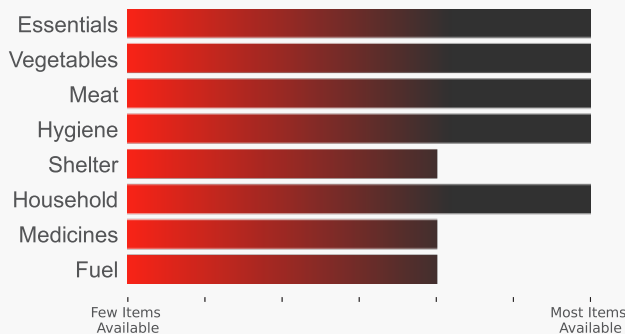
Customers



Retailers



Availability of Goods - Supply of shelter NFIs worsened slightly in June, but overall supply was very good in the Kawkareik village. Supply was better for foods than for NFIs.



Scarce Items

- Medicines
- Fuel

Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Eindu, Hpa-An.
- **Lead Time:** <1 day.
- **Shipping Costs:** Rising.
- **Example Rates:**



50kg Rice Bag
12,000 MMK
(from Hpa-An)



Small Car
130,00 MMK
(from Hpa-An)



Small Truck
180,000 MMK
(from Hpa-An)



Small Boat
-

Retailer Challenges - Challenges related to security and weak demand diminished slightly in June, but many other difficulties remained for Kawkareik village retailers. Retailers reported little relief from challenges related to supply, transportation, and cash access.



Kyainseikgyi Township (Kyainseikgyi)

Town Market

Kyainseikgyi Town market was active and fairly well supplied, but security was a concern for retailers.

Kyainseikgyi Town market was open throughout the day and free from damage or closures in June. Observers described the market area as safe, and customer activity was robust. Overall supply was relatively good, and supply was better for foods than for NFIs. Supply lead times from Hpa-An were somewhat slow and shipping costs were rising. Despite recent market stability retailers faced a number of business challenges, and safety/security was still their greatest concern.

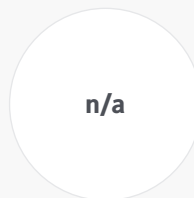


Market Functionality - Town market hours were stable in June, and the market was open throughout the day. There was no recent damage or closures, and observers said the market environment was safe.

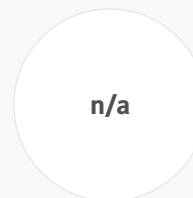
- **Opening Hours:** 5am-4pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous month.

Market Activity - Kyainseikgyi Town market was fairly active for the region, and customers arrived from neighboring villages and townships.

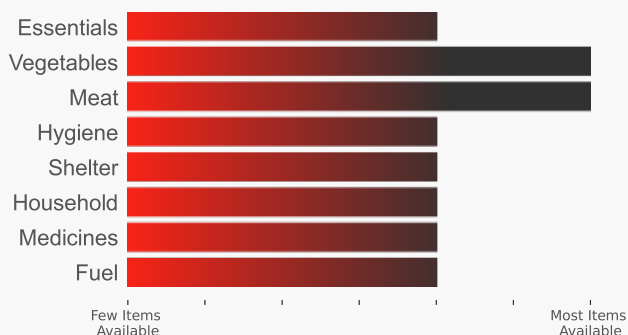
Customers



Retailers



Availability of Goods - Supply was relatively good in Kyainseikgyi Town in June. Supply of foods was better than for NFIs, although not all essential food items were available. Supply of rice and fuel was particularly poor.



Scarce Items

- *Rice*
- *Packaged foods*
- *Fuel*

Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Eindu, Hpa-An.
- **Lead Time:** 3 days.
- **Shipping Costs:** Rising.
- **Example Rates:**



50kg Rice Bag
5,500 MMK
(from Mawlamyine)



Small Car
325,00 MMK
(from Mywawaddy)



Small Truck
725,000 MMK
(from Mywawaddy)



Small Boat
-

Retailer Challenges - Retailers in Kyainseikgyi face a wide range of business challenges, but concerns about safety/security was foremost among them. Poor transportation, irregular supply, weak demand, poor cash access, and damage to inventory were all challenges as well.



Kyainseikgyi Township (Hpayarthonesu)

Town Market

Hpayarthonesu Town market was stable and active in June, and supply of both food and NFIs was good. The border town market remained open throughout the day in June, and there were no reports of recent closures or damage. A large number of retailers and customers were active in the market, including some from surrounding villages. Supply of goods from Hpa-An Township was good—particularly for NFIs—and shipping costs were stable. Retailers suggested that business challenges in Hpayarthonesu were not terribly severe, but among them were poor transportation, supply, and cash access.

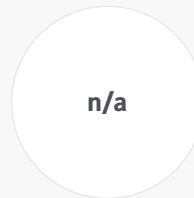


Market Functionality - Town market hours were stable in June, and the market was open throughout the day. There was no recent damage or closures, and observers said the market environment was safe.

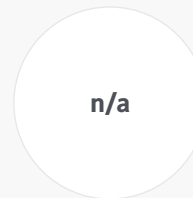
- **Opening Hours:** 5am-6pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous month.

Market Activity - Hpayarthonesu Town market was active in June, and customers arrived from neighboring villages and townships.

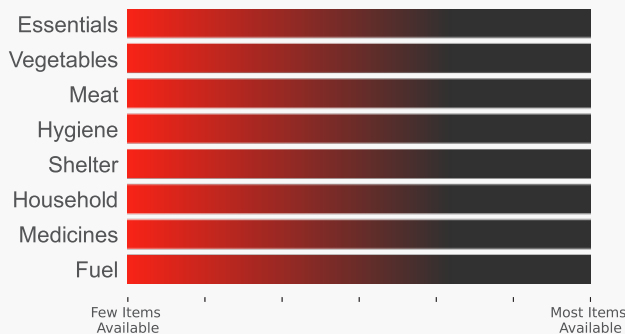
Customers



Retailers



Availability of Goods - Most foods and NFIs were available in Hpayarthonesu Town market. Some vegetables and rice varieties were scarce, but overall most items were available.



Scarce Items

- Rice
- Vegetables

Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Eindu, Hpa-An.
- **Lead Time:** <1 day.
- **Shipping Costs:** Stable.
- **Example Rates:**



50kg Rice Bag
5,000 MMK
(from Thanbyuzayat)



Small Car
100,000 MMK
(from village)



Small Truck
300,000 MMK
(from village)



Small Boat
-

Retailer Challenges - Hpayarthonesu Town retailers reported fewer and less-severe challenges relative to those in other markets in the region. Poor transportation and supply along with limited access to cash were the most noteworthy challenges reported in June.



Myawaddy Township

Town Market

Myawaddy Town market activity and supply were stable, but retailers worried about exchange rates.

Myawaddy market remained stable and operational in June, and there was no recent damage or closures. Customer activity remained elevated and visitors arrive regularly from villages. Supply of both foods and NFIs was good in Myawaddy Town, although some medicines and rice varieties were scarce. Supply continued to arrive from Mae Sot but shipping costs were rising. Retailers struggled most with access to cash / working capital, as exchange rates increased the cost of procuring new inventory.

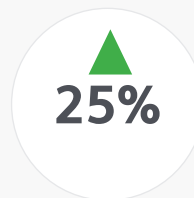


Market Functionality - Market hours were stable in Myawaddy Town, and the market area remained safe. There were no recent closures, and observers reported little change in market functions.

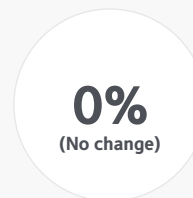
- **Opening Hours:** 5am-6pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous month.

Market Activity - Market activity remained high after rebounding in May, and customers continued to visit from nearby villages.

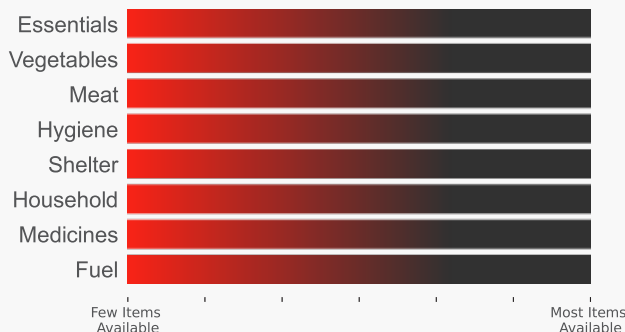
Customers



Retailers



Availability of Goods - Availability of food and NFIs in Myawaddy Town market remained very good in June, and most foods and NFIs were available in the market. Some common medicines and rice varieties were not available.



Scarce Items

- Rice
- Vegetables
- Medicines

Transport & Logistics -

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Mae Sot.
- **Lead Time:** <1 day.
- **Shipping Costs:** Rising.
- **Example Rates:**



50kg Rice Bag
11,000 MMK
(from Mae Sot)



Small Car
150,000 MMK
(from Mae Sot)



Small Truck
400,000 MMK
(from Mae Sot)



Small Boat
-

Retailer Challenges - Challenges related to cash access were top of mind for Myawaddy Town retailers near the Thai border who cited exchange rates as a major difficulty. Worries about weak demand also grey in June, although concerns about safety/security were notably absent.



Indicator Descriptions

Market Functionality

Opening Hours: Typical market hours during the week of data collection.

Market Security: Observer's assessment of security environment in/around market, relative to preceding months.

Market Damage: Whether significant recent damage to market infrastructure and/or inventory has occurred.

Closures: Whether market-wide closures affected the location during the month of data collection.

Market Activity

Retailer Activity: Estimated portion of normal (e.g., early-November 2023) retailers active in the market.

Customer Traffic: Estimated portion of normal (e.g., early-November 2023) customers visiting the market.

Customers Served: Provenance of customers served by the market.

Availability of Goods, by Category

Availability: Estimated portion of goods in each category with reliable availability.

Category	Examples
Essentials	Rice, cooking oil, pulses, etc.
Vegetables	Eggplant, long bean, watercress, green chili, etc.
Meat/Fish	Chicken, dried fish, fresh fish, fish paste, etc.
Hygiene	Soap, detergent, sanitary pads, toothpaste, etc.
Shelter	Plastic tarp, wood, nails, wire, construction tools, etc.
Household	Blanket, clothing, towels, jerry can, cooking pots, etc.
Medicines	Paracetamol, amoxicillin, etc.
Fuel	95 octane, 92 octane, etc.

Transportation & Logistics, by Modality

Inter-Township: Whether or not inter-township shipping is formally allowed, according to retailers.

Suppliers: Primary source of goods supplied to the market, according to retailers.

Lead Time: Time needed to receive goods after order is placed, according to retailers.

Shipping Costs: Whether shipping costs are falling, stable, or rising in recent weeks.

Example Rates: Example one-way shipping costs, according to retailers.

Retailer Challenges

Measure: Qualitative estimate of the frequency / severity of challenge: low (white), medium (yellow), or high (red).

Challenge	Description
Transport Limits	Price and availability of shipping / transportation services.
Supply Limits	Ability to maintain and replenish inventory with new supply.
Weak Demand	Customer purchases and active demand for goods.
Market Damage	Damage to market infrastructure and/or inventory.
Cash Access	Availability of desired cash and/or credit (for business operations).
Personal Safety	Personal safety of retailers and/or customers in/around market.

Market Analysis Unit (MAU)

The Market Analysis Unit is an independent project that provides donors, humanitarian responders, development practitioners and private sector actors in Myanmar with data and analysis to better understand the impacts of market developments, 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 services).

CONTACT

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