

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 May 13-14, 2024. Reports available at www.themimu.info/market-analysis-unit.

KEY FINDINGS

- **Retailers began returning to Kawkareik Town**, and Myawaddy retail markets were largely normal;
- **Market activity grew in towns** as security conditions in/around markets improved slightly;
- **Supply of shelter and hygiene NFIs improved a bit**, and food/NFI supply remained fairly good regionally;
- **Retailers reported declining sales/demand** likely due to a seasonal dip in household spending;
- **Shipping costs rose in Kawkareik and Myawaddy**, as monsoon rains damaged road infrastructure;
- **Retailers worried about supply and cash access** as sales fell and prices remained high.



Regional Overview

Market Functionality - Market operations were stable in May, but security remained poor in some markets.

Markets remained open and generally free from closures, but conditions remained unsafe in/around Kawkareik and Hlaingbwe markets. Security improved in Myawaddy Town market and observers described the area as safe.

Market Activity - Relative stability boosted activity in May, and retailers returned to Kawkareik Town.

Activity in Myawaddy Town market returned to normal in May, and retailers gradually began returning to Kawkareik Town. On the other hand, poor security and reduced monsoon-season spending curtailed market activity in Hlaingbwe Town.

Availability of Goods - Supply remained good in the region, and supply of hygiene and shelter NFIs grew.

Fuel and medicines remained more scarce than other goods, but supply of high-demand shelter and hygiene NFIs improved across the region in May. That said, scarcity problems still affected NFIs more often than food items. Food supply—already fairly good in April—remained stable in May.

Transport & Logistics - Monsoon rains damaged roads and raised shipping costs, but trade links were intact.

Goods continued to reach their destinations in May, and lead times for shorter distances remained stable. That said, road conditions began to worsen under monsoon rains, and this drove up shipping costs in May. Kawkareik retailers resumed supplying from Myawaddy Town, suggesting improved trade links in May.

Retailer Challenges - Weak demand and poor cash access were growing challenges as monsoon set in.

Retailer concerns related to weak demand increased sharply in May, as households spent less and the lean season took shape. As sales fell, retailers struggled more with cash access as well. On the other hand, retailers reported fewer challenges related to security in May than in April. Retailers in Kawkareik and Hlaingbwe reported the greatest uptick in challenges, while Myawaddy retailers reported fewer challenges in May than in April.

What to Watch

- Monsoon rains will further damage road quality in the months ahead and likely raise **shipping costs**;
- The potential for reduced conflict could allow for improved market **operations** in the rainy season;
- Continued improvement in **shelter** and **hygiene** NFI supply could further reduce health risks in monsoon.

Hlaingbwe Township

Town Market

Supply remained good in Hlaingbwe Town, but activity fell amid poor security and a seasonal dip in sales.

Hlaingbwe market remained operational, but observers still described the market as unsafe. Customer activity fell slightly in a pattern not uncommon this time of year. Food and NFI supply remained good and fuel supply improved in May, although supply of clean drinking water worsened. Transport costs were stable and retailers continued to supply from Hpa-An Town. Retailers' security concerns receded in May, but challenges related to weak demand and supply difficulties remained.

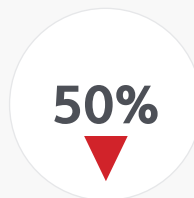


Market Functionality - Market hours were stable in Hlaingbwe Town and there was no direct market damage. Observers said the market environment remained unsafe in May.

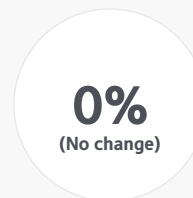
- **Opening Hours:** 5am-6pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Hlaingbwe town market activity declined slightly in May due to local tensions and seasonal belt-tightening at the household level.

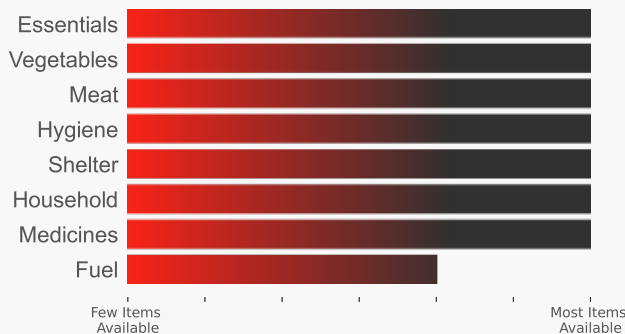
Customers



Retailers



Availability of Goods - Supply of food and NFIs remained very good in Hlaingbwe Town in May, and fuel supply improved. Packaged foods and drinking water were the most scarce items.



Scarce Items

- *Packaged foods*
- *Rice powder*
- *Drinking water*

Transport & Logistics

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



50kg Rice Bag
2,000 MMK
(from Hpa-An)



Small Car
45,000 MMK
(from village)



Small Truck
150,000 MMK
(from village)



Small Boat
-

Retailer Challenges - Supply and access to cash remained the greatest challenges for Hlaingbwe Town retailers. Retailers reported weak demand despite high inventory levels, partly due to a seasonal decline during monsoon. Challenges related to safety/security receded somewhat in May.



Hpa-An Township

Town Market

Market conditions were stable in Hpa-An Town in May and supply of shelter and hygiene NFIs improved. Hpa-An market operations remained stable in May, and customer activity grew for second straight month. Supply of shelter and hygiene NFIs improved in May, and overall supply of food and NFIs was good. Supply of fuel and medicines remained most problematic, and regulations continued to limit rice supply availability. Shipping costs were stable and Thaton remained a key supplier despite transportation complications in Mon State. Retailers said flagging monsoon season demand was a challenge.

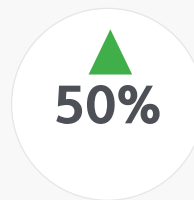


Market Functionality - Market hours were stable in Hpa-An Town, and the market area remained safe. Observers reported little change in market functions in Hpa-An Town in May.

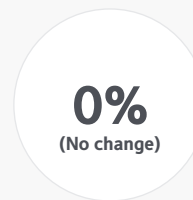
- **Opening Hours:** 6am-5:30pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Hpa-An Town market remained quite active in mid-May, although retailer activity was stable.

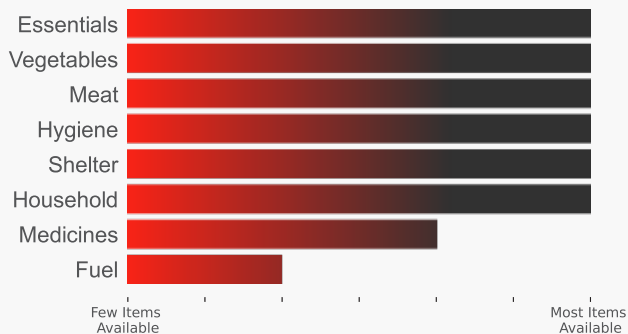
Customers



Retailers



Availability of Goods - Supply of hygiene and shelter NFIs improved in Hpa-An Town in May, and goods were generally available. Supply of medicines and fuel remained most lacking.



Scarce Items

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

Transport & Logistics

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



50kg Rice Bag
1,500 MMK
(from Thaton)



Small Car
190,000 MMK
(from village)



Small Truck
300,000 MMK
(from Thaton)



Small Boat
-

Retailer Challenges - Safety concerns increased somewhat in Hpa-An in May, but retailer challenges were otherwise unchanged in May. Transportation and supply remained the most prominent challenges. Concerns about weak demand remained, but with less urgency as market activity grew in May.



Kawkareik Township

Village Market

Village market activity remained challenging in May, and retailers began returning to Kawkareik Town. The village market remained open, but observers still said conditions were unsafe. Retail activity remained slightly higher than normal in May, although some retail activity began shifting back to Kawkareik Town. Supply of goods remained decent in the village market, and supply of critical hygiene and shelter NFIs improved. Shipping costs rose again in May as monsoon rain damaged roads and rendered supply routes more perilous. Retailers still faced many challenges, and worries about weak demand grew.

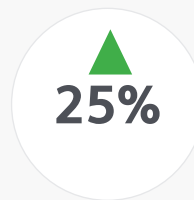


Market Functionality - Village market hours remained stable, and there was no recent damage or closures, but observers said the local market environment remained unsafe.

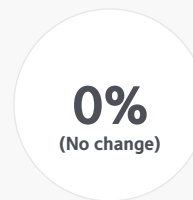
- **Opening Hours:** 5am-11am, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Village market activity remained elevated, and retail activity was stable even as more retailers returned to Kawkareik Town.

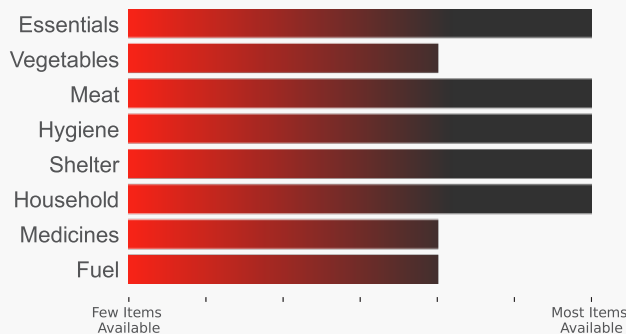
Customers



Retailers



Availability of Goods - Supply of hygiene and shelter NFIs improved in the Kawkareik village market in May, and in general most goods were available. Supply of medicines and fuel remained most lacking.



Transport & Logistics

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



50kg Rice Bag
9,000 MMK
(from Hpa-An)



Small Car
150,00 MMK
(from Myawaddy)



Small Truck
250,000 MMK
(from Hpa-An)



Small Boat
-

Retailer Challenges - Kawkareik village retailers continued to face many retail challenges in May. Challenges related to weak demand grew more severe, possibly due to more commercial activity shifting away from village markets and back to Kawkareik Town.



Myawaddy Township

Town Market

Myawaddy Town market activity increased in May, and retail there largely returned to normal. Myawaddy market remained operational and observers said safety in/around the market improved in May. Customer activity increased as security improved and area customers returned. Supply of food and NFIs remained good, and medicine availability improved. Shipping costs increased for a second straight month in May, due either to continued disruption from conflict or declining monsoon road conditions. Retailers faced fewer challenges in May, although cash access remained poor amid flagging demand.

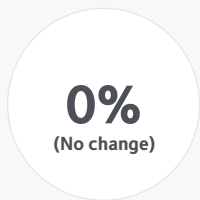


Market Functionality - Market operations were increasingly stable in Myawaddy Town, and security improved in May. There were no major closures or market damage.

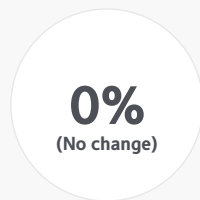
- **Opening Hours:** 5am-6pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Market activity rebounded in May to fairly normal levels, as both retailers and customers returned from surrounding areas.

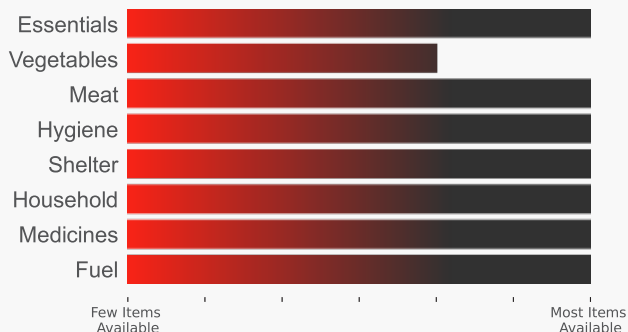
Customers



Retailers



Availability of Goods - Availability of food and NFIs in Myawaddy Town market remained very good in May, and supply of medicines improved. Most foods and NFIs were available in the market.



Scarce Items

- Rice
- Vegetables

Transport & Logistics

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



50kg Rice Bag
10,000 MMK
(from Mae Sot)



Small Car
150,000 MMK
(from Mae Sot)



Small Truck
350,000 MMK
(from Mae Sot)



Small Boat
-

Retailer Challenges - Retail challenges receded in Myawaddy as market operations returned to normal. Poor cash access remained the greatest challenge for retailers, but fewer worried about safety, transportation, and supply. Challenges related to weak demand grew in May, possibly linked to lower monsoon-season demand.



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 week 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).

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