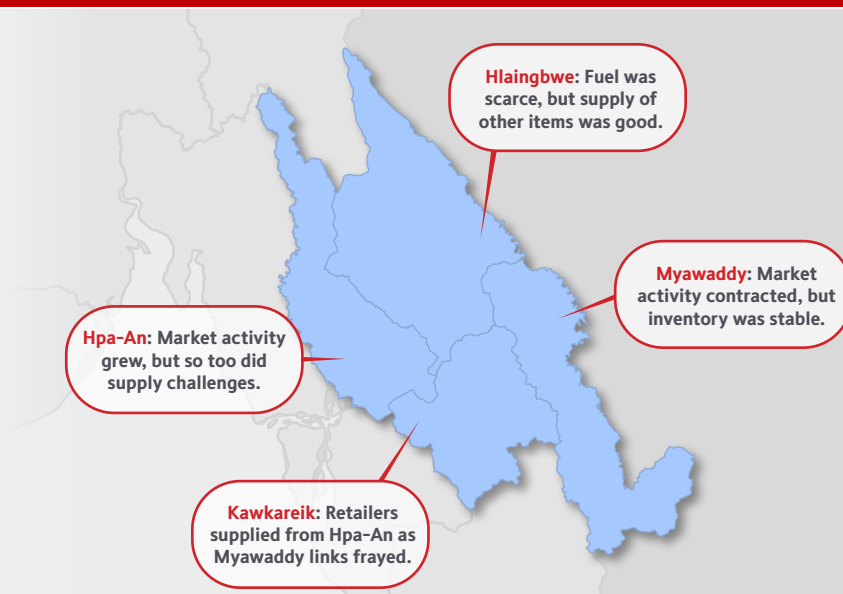


Rapid Market Assessment

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 April 11-15, 2024. Reports available at www.themimu.info/market-analysis-unit.

KEY FINDINGS

- **Markets were functional but security was poor** in mid-April as events unfolded along the Thai border;
- **Market activity dipped in Asian Highway markets** although Hpa-An saw customer activity rise;
- **Medicine supply improved a bit in some markets**, but supply was largely unchanged as of mid-April;
- **Kawkareik retailers looked west for supply** as the evolving conflict frayed linkages with Myawaddy;
- **Poor supply and cash access were big challenges**, and retail challenges in general deepened in April;
- **Retailers voiced pessimism about boosting supply** particularly in Kawkareik and Myawaddy.



Regional Overview

Market Functionality - Town markets continued to operate, but security remained poor. Markets remained open and generally free from closures, but observers described conditions as unsafe. Among the markets monitored, only Hpa-An was described as relatively safe.

Market Activity - Market activity declined in Kawkareik and Myawaddy in April, but it grew in Hpa-An. Conflict events muted market activity along the Asian Highway in mid-April, although the more-stable Hpa-An market saw an uptick in customers.

Availability of Goods - Supply of medicines improved slightly, but supply was otherwise mostly unchanged. Fuel remained most scarce, and NFIs remained scarcer than food items. While supply improved slightly in Kawkareik and Hlaingbwe, there was overall little change.

Transport & Logistics - Kawkareik retailers looked west for supply as Myawaddy linkages frayed. Formal transportation grew more difficult in Kawkareik and Myawaddy, driving up transport costs. In Kawkareik, retailers looked west to Eindu and Hpa-An for supply as market conditions in Myawaddy appeared uncertain. On the other hand, trade between Hlaingbwe and Hpa-An appeared uninterrupted and shipping costs were stable.

Retailer Challenges - Various retail challenges grew worse across markets April. Retailers in three-of-four markets monitored reported growing challenges in mid-April. Many challenges grew more severe, even as concerns about weak demand fell off sharply. Retailer concerns about limited supply and poor cash access rose considerably in April, but safety concerns also made retail difficult.

Possible Interventions - Myawaddy and Kawkareik retailers were pessimistic about boosting supply. Retailers in Kawkareik and Myawaddy again said they would be unable to boost supply even with market interventions, and Hpa-An retailers appeared less confident as well. However, Hlaingbwe retailers continued to say infrastructure repair, loans, and other aid could allow them to boost supply.

What to Watch

- Ongoing conflict in **Kawkareik** township will tighten the bottleneck for Thai goods entering Myanmar;
- Monsoon rains may soon render the Asian Highway's backup routes less navigable, hindering trade;
- Trade disruptions may limit access to **NFIs** critical to shelter and WASH programs in monsoon season.

Hlaingbwe Township

Town Market

Supply was stable in Hlaingbwe Town in mid-April, but security worsened and retailers' concerns grew.

Hlaingbwe market remained operational, but observers described the market environment as less safe in April. Customer activity remained fairly stable with little outflow of retailers or customers. Supply of essential foods and medicines improved in mid-April, and supply was generally good; however, fuel remained scarce. Transport costs were stable and retailers continued to supply from Hpa-An Town. Limited supply and poor access to cash worsened slightly in April and remained retailers' greatest concern.

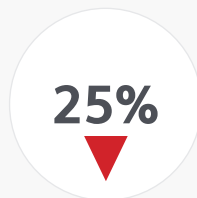


Market Functionality - Market hours remained stable in Hlaingbwe Town and there was no direct market damage, but observers said the market environment grew less safe in April.

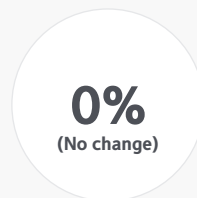
- **Opening Hours:** 5am-6pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Hlaingbwe town market activity remained fairly stable in April, and customer traffic was down only moderately this year.

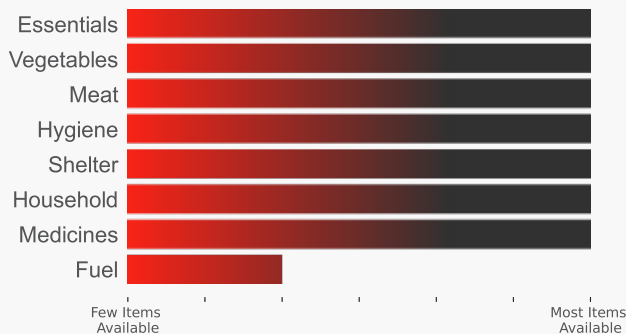
Customers



Retailers



Availability of Goods - Most goods were available in Hlaingbwe town. Supply of medicines and essential foods improved in mid-April, although fuel supply worsened.



Scarce Items

- Fuel

Transport & Logistics

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



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



Small Car
45,000 MMK
(from Hpa-An)



Small Truck
150,000 MMK
(from Hpa-An)



Small Boat
-

Retailer Challenges - Hlaingbwe town retailers remained most concerned with supply and access to cash, and more so in April than in March. In April retailers also continued to struggle with weak demand, poor cash access, and personal safety.



Hpa-An Township

Town Market

Market conditions were stable in Hpa-An Town and activity grew, but concerns about supply grew as well.

Hpa-An market operations remained stable in mid-April, and customer traffic grew moderately. Availability of goods was largely unchanged, with supply generally poorer for NFIs than for foods. Fuel and rice supply remained most problematic, although processed foods imported from Thailand also grew more scarce. Thaton remained a key supplier, and shipping costs were stable. Supply grew more challenging in mid-April as conflict reduced retailers' access to Thai imports.

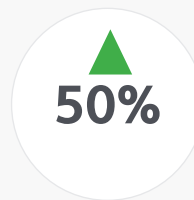


Market Functionality - Market hours were stable in Hpa-An Town, and the market area remained safe. Observers reported little change in market functions in Hpa-An Town in mid-April.

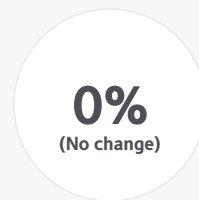
- **Opening Hours:** 6am-5:30pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Hpa-An Town market saw an increase in customers in mid-April, although retailer activity remained stable.

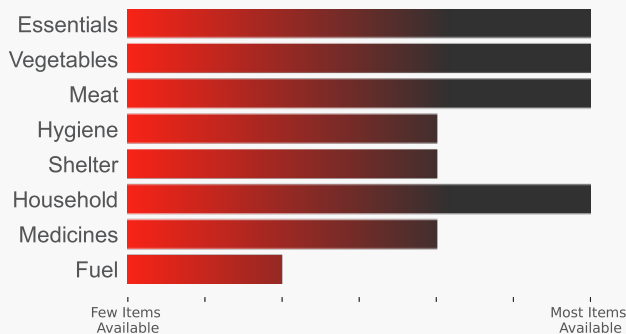
Customers



Retailers



Availability of Goods - Supply of goods was unchanged in Hpa-An Town market. Many foods were available in the Hpa-An Town market, although supply of NFIs remained much poorer. Supply of fuel was particularly poor.



Scarce Items

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

Transport & Logistics -

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Thaton.
- **Lead Time:** 2 days.
- **Shipping Costs:** Stable.
- **Example Rates:**



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



Small Car
190,000 MMK
(from Thaton)



Small Truck
275,000 MMK
(from Thaton)



Small Boat
-

Retailer Challenges - Transportation and supply grew more difficult for Hpa-An retailers in mid-April, and they remained the greatest challenge. Concerns about personal safety remained as well, although worries about weak demand faded in April as customer traffic increased.



Kawkareik Township

Village Market

Market activity slowed amid safety concerns in Kawkareik, and retailers sought new sources of supply. The village market remained open, but observers still said conditions were unsafe. Retail activity contracted sharply in as security in the township worsened and more households became displaced. Nonetheless, availability of goods remained decent in the village market, and medicine supply improved slightly. Shipping costs climbed as trade with Myawaddy slowed and retailers looked west to source goods from Eindu and Hpa-An. Retailers continued to face many challenges, especially related to cash and supply.

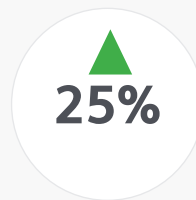


Market Functionality - Village market hours remained stable, and there was no recent damage or closures, but observers said the local market environment remained unsafe.

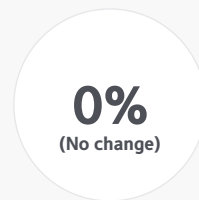
- **Opening Hours:** 5am-11am, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Village market activity contracted sharply in April, although it was still higher on net than last year. Retailer counts were unchanged.

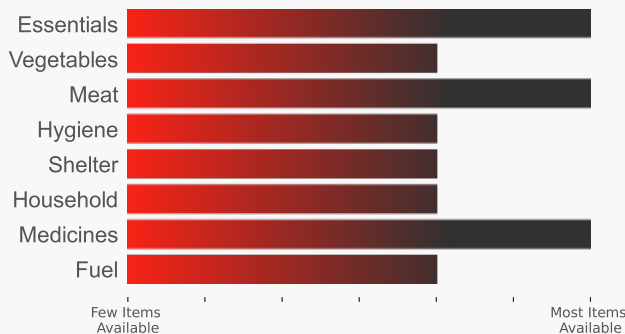
Customers



Retailers



Availability of Goods - Supply of goods in the Kawkareik village market remained moderately-good in mid-April. Supply of medicines and meat improved, while supply of some NFIs worsened since March.



Scarce Items

- Fuel
- Electronics

Transport & Logistics

- **Inter-Township:** Formal shipping not allowed.
- **Suppliers:** Eindu, Hpa-An.
- **Lead Time:** 1 day.
- **Shipping Costs:** Rising.
- **Example Rates:**



50kg Rice Bag
10,000 MMK
(from Myawaddy)



Small Car
125,00 MMK
(from Myawaddy)



Small Truck
200,000 MMK
(from Myawaddy)



Small Boat
-

Retailer Challenges - Kawkareik village retailers continued to face numerous challenges in mid-April. Supply limits and cash access grew worse, while safety and transportation remained problematic. Concerns about weak demand waned in April even though customer traffic declined.



Myawaddy Township

Town Market

Myawaddy Town market remained functional and well-supplied in mid-April, but activity contracted.

Myawaddy market remained operational in mid-April, although observers described the commercial area as unsafe. Customer activity contracted sharply as security concerns mounted. Despite reduced activity, supply of most items remained good. Shipping costs rose as conflict disrupted linkages with neighboring townships, yet retailers still supplied goods from Thailand through informal border crossings. Retailers continued to face many challenges which grew ever more severe by mid-April.

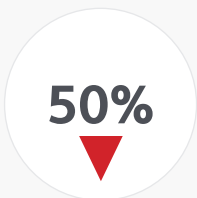


Market Functionality - Market operations were stable in Myawaddy Town in mid-April and there were no major closures, although observers regarded the environment as unsafe.

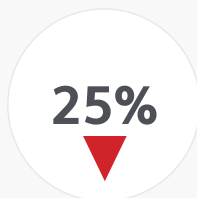
- **Opening Hours:** 5am-6pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Customer traffic declined sharply in mid-April amid security concerns, although customers continued to visit from nearby villages.

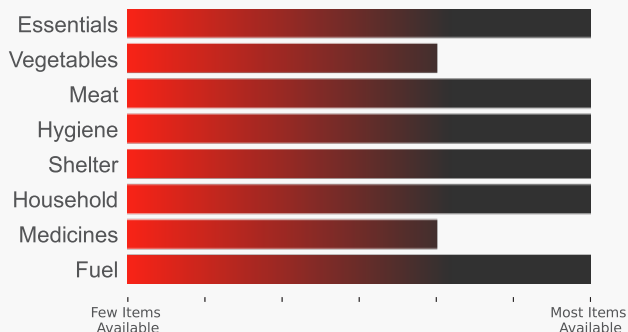
Customers



Retailers



Availability of Goods - Availability of food and NFIs in Myawaddy Town market was unchanged in mid-April and remained fairly good. Some medicines and vegetables were unavailable, but most goods were on offer.



Scarce Items

- Rice
- Vegetables
- Medicines
- Fuel

Transport & Logistics

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



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



Small Car
500,000 MMK
(from Mae Sot)



Small Truck
1,000,000 MMK
(from Mae Sot)



Small Boat
-

Retailer Challenges - The wide range of challenges retailers faced in March grew more severe in mid-April. Transportation and supply limits, difficulty with cash access, and concerns about personal safety all worsened in April as tensions rose during the first half of the month.



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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