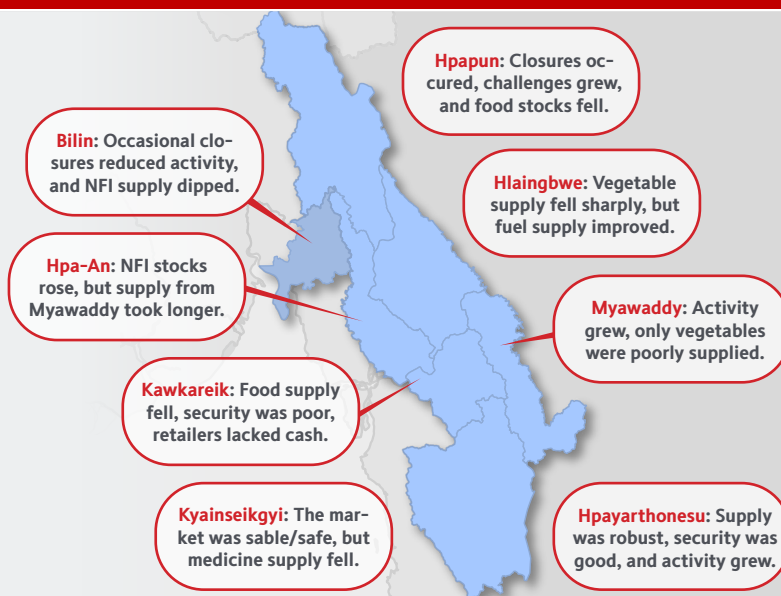


Rapid Market Assessment

This Rapid Market Assessment (RMA) is a supplement to the MAU Market Price Report in Kayin State. It provides township-level data on market functionality, activity, supply, and logistics. Data were collected through observation and KIIs with retailers during October 20-27, 2024. Reports available at www.themimu.info/market-analysis-unit.

KEY FINDINGS

- **Markets remained open and functional**, but security troubled those in Kawkareik, Bilin, and Hpapun;
- **Bilin and Kamarmaung markets closed at times**, and security remained quite poor in Kawkareik;
- **Retail conditions grew worse in Kamarmaung**, as food supply declined and retail challenges grew;
- **Regional supply of meat/fish and vegetables fell**, and essential food supply dipped slightly this month;
- **Shipping costs continued rising in some markets**, but in general retail challenges were little changed;
- **Retail activity grew in Myawaddy**, although lead-times for shipping to Hpa-An grew to one week.



Regional Overview

Market Functionality - Markets beyond Kawkareik remained open and safe, but closures affected Hpapun and Bilin. Markets in Kamarmaung and Bilin experienced several temporary closures in October, but other markets operated mostly without interruption. Markets were open throughout the day, and market surroundings were generally considered safe except in Kawkareik.

Market Activity - Retail activity varied by region in Kayin State, but it grew along the Thai border. Market activity grew in Myawaddy, possibly due to complications with trade across the Chinese border in late-October. On the other hand, activity declined in Kamarmaung and Bilin where closures occurred. Retail and customer traffick was stable in Hpa-An and southern Kayin State.

Availability of Goods - Food supply worsened in October, but fuel supply improved a bit. Supply of meat/fish and vegetables worsened in region, and essential food supply dipped slightly as well. Supply of medicines, hygiene NFIs and fuel improved slightly, but there was little change in the availability of shelter NFIs. Supply remained poorest in Kamarmaung, Bilin, and Kyainseikgyi Town, however the steepest fall-off in supply was in Kawkareik. Supply was best in Hpa-An and the border towns of Myawaddy and Hpayarthonesu.

Transport & Logistics - Shipping costs continued rising although not everywhere as they did in August. More than half of all markets monitored saw higher shipping costs again in October, but costs were stable in Hpa-an, Kyainseikgyi, and Hpayarthonesu. Shipping times between Hpa-An and the Myawaddy border grew from one day to five days as local conflict continued to disrupt key shipping routes.

Retailer Challenges - Kamarmaung retailers again reported growing challenges, but elsewhere supply and transportation difficulties receded. In general, improved weather likely reduced transportation challenges, although reports of damage to inventory continued. Retailers in Kawkareik and Myawaddy continued to face many challenges, and they were joined by Kamarmaung. Hpayarthonesu retailers reported few challenges.

What to Watch

- Sustained challenges in and around **Kamarmaung** market may begin to deplete inventory;
- Markets in **Myawaddy** and **Hpayarthonesu** may grow more active if border trade with China slows;
- The cost of **shipping** could prove more stable as weather becomes more consistent in winter.

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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