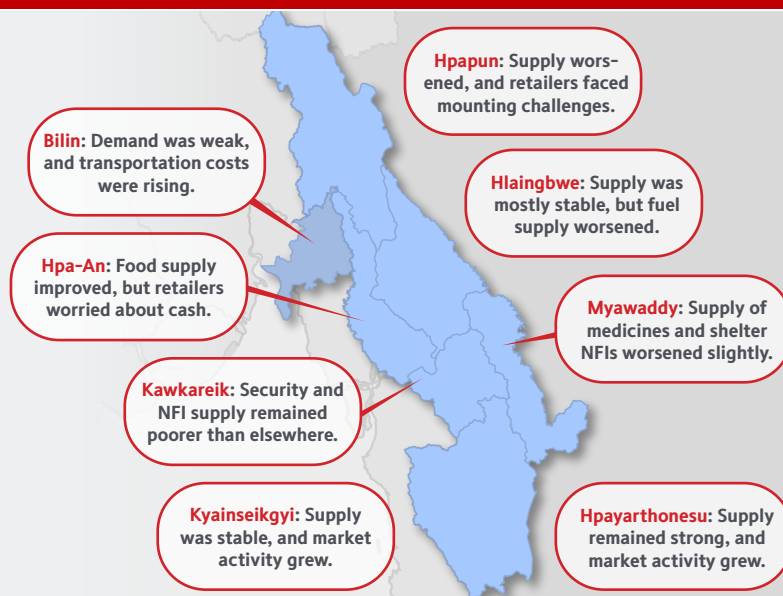


Rapid Market Assessment

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 August 23-30, 2024. Reports available at www.themimu.info/market-analysis-unit.

KEY FINDINGS

- **Markets were open and operational**, but challenges mounted particularly in eastern Kayin State;
- **Market conditions deteriorated in Kamarmaung**, as supply worsened and market closures increased;
- **Security remained poor in Kawkareik**, and security concerns grew in Myawaddy and Hlaingbwe;
- **Fuel and NFI supply declined in August**, but food supply was stable and even improved in Hpa-An;
- **Shipping costs continued rising across the region**, but lead-times were stable even amid poor weather;
- **Supply and transport remained key problems**, but cash-related concerns were growing among retailers.



Regional Overview

Market Functionality - Town markets remained operational, and observers said they were relatively safe.

Markets were open from 5am or 6am until 6pm, and temporary closures were rare. Although markets were generally stable and operational there were some exceptions: Bilin and Kamarmaung saw occasional closures in August, and security in Kawkareik Town remained poor.

Market Activity - Retail activity was stable in August, and stable markets attracted more customers.

Markets in Kyainseikgyi and Hpayarthonesu grew slightly, while Kamarmaung and Hpa-An markets saw large growth in customer activity. Only Kawkareik saw significant contraction with both customer and retailer activity dropping sharply once again. Retailer activity also declined slightly in Kamarmaung, but elsewhere it was stable.

Availability of Goods - Supply declined somewhat in August, driven by poor access to fuel and NFIs.

Food supply was largely unchanged, but supply of fuel, shelter NFIs, hygiene NFIs, and medicines all declined slightly. Kamarmaung saw a large drop-off in supply, while Myawaddy and Hlaingbwe also saw supply worsen somewhat. Supply improved for a variety of goods in Hpa-An. In general supply of fuel and medicines was poorest among the various categories in August.

Transport & Logistics - Shipping costs increased throughout the region, but transportation times were mostly stable.

Virtually all retailers reported increased shipping costs from June to August, but in most cases worsening weather conditions had not yet increased shipping times. There were exceptions in Kamarmaung, where conflict made shipping slower and more difficult and in Hpayarthonesu where shipping times grew.

Retailer Challenges - Kamarmaung retailers reported mounting challenges, and safety concerns grew in Myawaddy and Hlaingbwe.

Safety concerns grew prominently in August followed by cash access and transportation. Most business conditions grew more difficult in Kamarmaung. Myawaddy and Kawkareik retailers continued to express the deepest concerns, particularly related to poor cash access and supply.

What to Watch

- If intense monsoon weather mutes conflict activity it may temporarily help stabilize market **operations**;
- Seasonal flooding and landslides are likely to increase **shipping costs** and reduce **supply**;
- Town markets in **Kawkareik** and **Kamarmaung** will likely remain more troubled than others.

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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