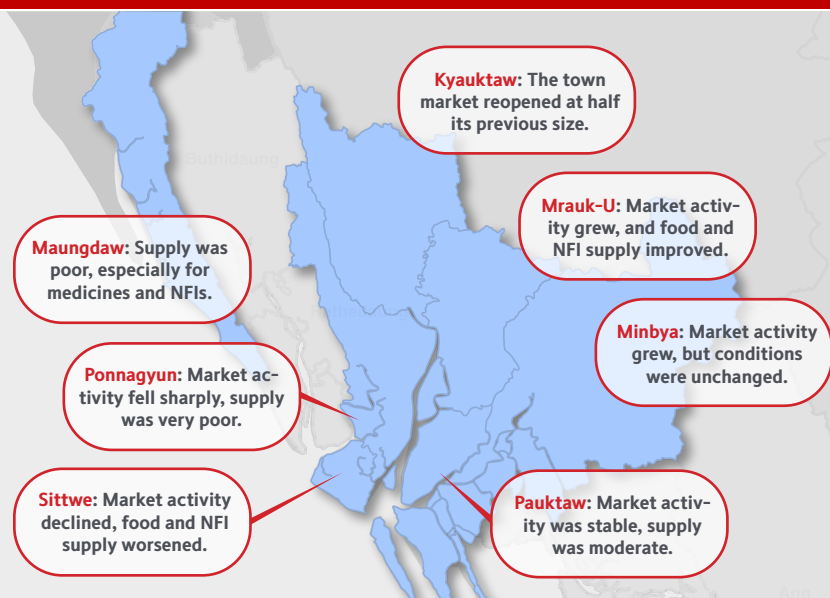


Rapid Market Assessment

This Rapid Market Assessment (RMA) is a supplement to the MAU Market Price Report in Rakhine State. It provides township-level data on market functionality, activity, supply, and logistics. Data were collected through observation and KIIs with retailers during Mar. 21-22, 2024. Reports available at www.themimu.info/market-analysis-unit.

KEY FINDINGS

- **Security remained poor in most markets in March** although operations continued uninterrupted;
- **Displacement continued to transform markets** as looser travel restrictions led retailers to relocate;
- **Minbya, Mrauk-U and Pauktaw supply improved**, but elsewhere supply was static or worsening;
- **Medicine and shelter NFIs were most scarce**, but vegetables and essential foods were often available;
- **Shipping costs fell again in March**, and retailers sourced goods from a wider range of locations;
- **Safety and cash access were major concerns**, and retail remained challenging despite improvements.



Regional Overview

Market Functionality - Markets were operational across the region in March, but observers said security was poor. Observers said security was poor at five of seven markets monitored, although there were no reports of new market damage.

Market Activity - Market activity continued evolving in March as households and retailers relocated. Some village markets continued to grow (Mrauk-U, Minbya) and others shrank (Ponnagyun) as easing movement restrictions allowed people to return to their home townships. However, Sittwe, Maungdaw, and Kyauktaw market activity remained muted. Sittwe and Maungdaw markets increasingly served only in-town customers, while markets elsewhere served larger geographies.

Availability of Goods - Supply improved in several markets in March, but medicines and shelter NFIs remained scarce. Vegetables remained available region-wide in March, and fuel supply improved. Yet many other foods and NFIs were unavailable, especially meat/fish, medicines, and shelter NFIs. Supply improved in Minbya, Mrauk-U, and Pauktaw, but supply worsened in Sittwe. The most severe supply shortages were in Maungdaw and Ponnagyun where the availability of goods changed very little in March.

Transport & Logistics - Shipping costs declined in March, although not in Sittwe and Maungdaw. Looser transportation restrictions reduced shipping costs for a second month in March, and retailers reported sourcing goods from a wider variety of locations. However Sittwe and Maungdaw markets remained isolated, and shipping did not improve there.

Retailer Challenges - Retail remained challenging in March despite improvements, and concerns focussed on safety and cash access. Retailers reported little relief in March, and in markets where transportation and supply improved worries shifted to safety/security and access to cash. In Sittwe and Maungdaw retail grew ever more challenging, and retailers continued to worry not only about cash and security as well as the still-poor transportation and supply conditions.

What to Watch

- Supply will be unreliable in **Sittwe** and **Maungdaw** as long as these markets remain isolated;
- The price and availability of **fuel** will increasingly drive prices in areas where movement improves;
- Supply of **NFIs** will likely remain poor as long as conflict continues to disrupt interstate shipping.

Kyauktaw Township

Town Market

Kyauktaw Town market reopened, but activity was half its previous level and retailers described it as unsafe. Market hours were stable in March, and there were no reports of new damage. Customers arrived from nearby villages and township, but overall activity was much lower than in November. Vegetables and fuel were available, but supply of medicines and hygiene products was poor. Retailers mainly sourced goods from villages within Kyauktaw Township, and shipping costs were high but stable. Retailers reported facing many challenges, notably poor safety, weak demand, and limited access to cash.

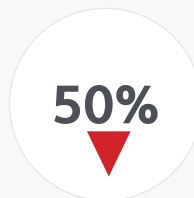


Market Functionality - Kyauktaw Town market was open and hours were stable, but retailers said the market environment was unsafe.

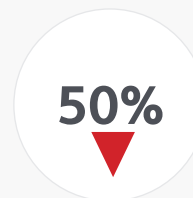
- **Opening Hours:** 6am-5pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Market activity in Kyauktaw Town was just half its previous level, but it was serving households from nearby villages and townships.

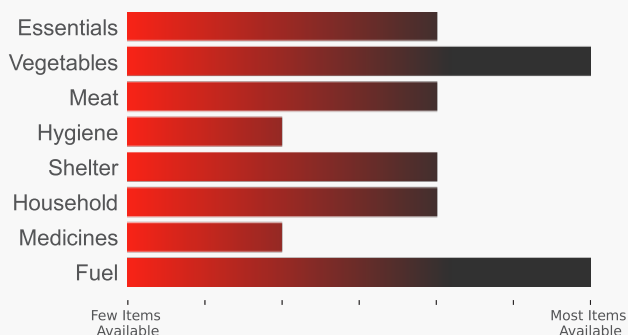
Customers



Retailers



Availability of Goods - A wide variety of vegetables were available, and fuel was available. Supply was poorest for medicines and hygiene products, although some other foods and NFIs were also unavailable.



Scarce Items

- Biscuits
- Soap
- Sanitary pads
- Medicines

Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Kyauktaw villages.
- **Lead Time:** 1-7 days.
- **Shipping Costs:** Stable.
- **Example Rates:**



50kg Rice Bag
1,000 MMK
(from village)



Small Car

-



Small Truck

-



Small Boat

-

Retailer Challenges - Kyauktaw retailers reported more challenges than retailers in other markets outside Sittwe. Retailers struggled most with safety/security, access to cash, and weak demand, however transportation, supply, and even market damage also presented challenges.



Transport Limits



Supply Limits



Weak Demand



Market Damage



Cash Access



Personal Safety

Maungdaw Township

Town Market

Market operations were stable in Maungdaw, but supply of NFIs grew much worse in March. Market hours were stable, but observers still described the market area unsafe. Market activity remained muted, and customers from area villages grew more rare in March. Most vegetables were still available, but supply of NFIs worsened considerably. Only fuel access improved in March. Retailers continued to source goods from Bangladesh and nearby Rathedaung Township, and shipping costs were stable. Retailers still faced many challenges in March, and they worried most about safety and access to cash.

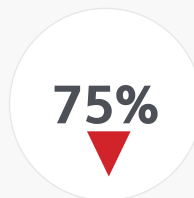


Market Functionality - Market hours were stable, and there were no recent closures, but retailers said the market environment remained unsafe.

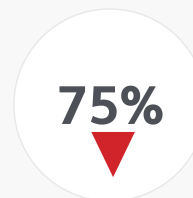
- **Opening Hours:** 7:30am-5pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Market activity was stable but remained well-below November levels. In March the market mainly served town residents only.

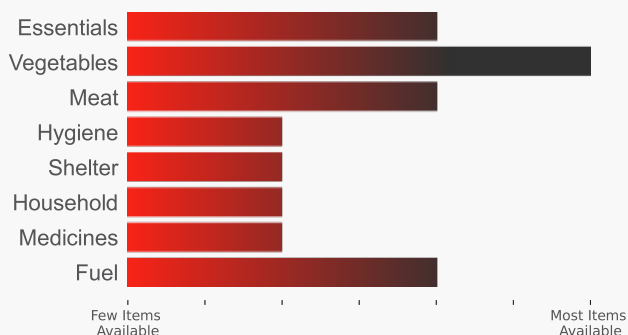
Customers



Retailers



Availability of Goods - Supply of NFIs worsened in Maungdaw in March, and supply was overall poorer here than in most other markets. That said, many vegetables remained available, and fuel supply improved.



Scarce Items

- Pulses
- Fruit
- Chicken
- Sanitary pads
- Toothpaste
- Soap
- Candles
- Fuel

Transport & Logistics

- **Inter-Township:** Formal shipping not allowed.
- **Suppliers:** Rathedaung, Bangladesh.
- **Lead Time:** 2 days.
- **Shipping Costs:** Stable.
- **Example Rates:**

50kg Rice Bag -

Small Car -

Small Truck 450,000 MMK (Rathedaung)

Small Boat -

Retailer Challenges - Maungdaw retailers continued to face multiple challenges, particularly poor safety/security and poor access to cash. Weak demand was less of a concern in March than in February, but this along with transportation limits and poor supply still remained notable challenges for retailers.



Minbya Township

Village Market

Minbya village market activity grew further in March, and retailers accessed new sources of supply. Market hours were stable, although observers said the market was less safe in March than in February. Market activity increased—remaining well-above November levels—and customers continued arriving from area villages and townships. Many foods and NFI were still available, and vegetable supply improved. Retailers still sourced goods from Toungup and Myebon, and shipping costs were falling. Retailers' challenges were unchanged, and transportation limits and poor supply were foremost among them.

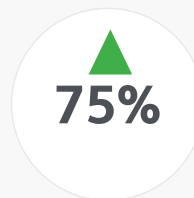


Market Functionality - Market hours were stable, and there was no recent damage or closures. Retailers described the village market as unsafe.

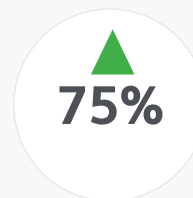
- **Opening Hours:** 5am-4:30pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Market activity swelled further in March, and the market still served area villages as well as customers from other townships.

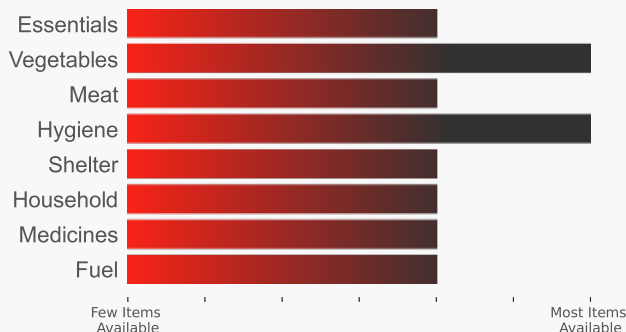
Customers



Retailers



Availability of Goods - Many foods and NFIs were available in the village market, but some items were still unavailable. Availability of vegetables and NFIs improved in March, although supply of other foods was unchanged.



Scarce Items

- *Baby products*
- *Medicines*

Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Toungup, Kan Taung Gyi.
- **Lead Time:** Unsure.
- **Shipping Costs:** Falling.
- **Example Rates:**



50kg Rice Bag
10,000 MMK
(Minbya town)



Small Car
180,000 MMK
(Minbya town)



Small Truck
250,000 MMK
(Minbya town)



Small Boat
-

Retailer Challenges - The challenges Minbya retailers faced were numerous and unchanged in March. Transportation and supply limits were the most significant challenges, but retailers also said lack of security, poor access to cash, and weak demand for goods were notable challenges as well.



Mrauk-U Township

Village Market

Supply improved in the Mrauk-U village, and market activity grew further. Market hours were stable in March, although observers described the area as unsafe. Customer activity grew further in March, but the market still served mainly nearby villages. Supply of essential foods and NFIs improved as transportation became easier and shipping prices fell. Retailers mainly sourced goods from Kyauktaw and villages within Mrauk-U township. Transportation and supply remained challenging despite improvements, and the prospect of restocking inventory increased concerns about access to cash.

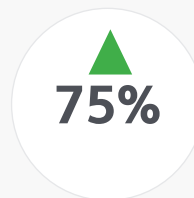


Market Functionality - Market hours were stable and there were no recent closures, but retailers increasingly described the market area as unsafe.

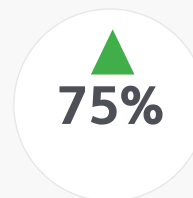
- **Opening Hours:** 6am-5pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Market activity grew further in March, but the market still rarely served customers from other townships.

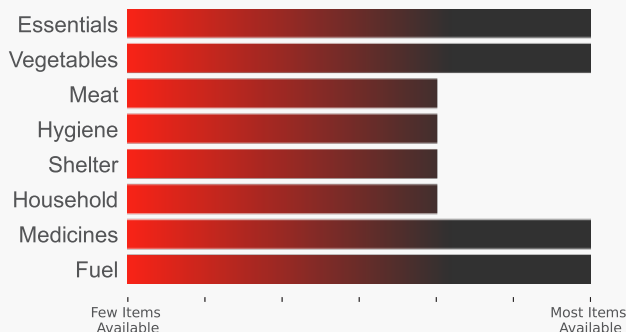
Customers



Retailers



Availability of Goods - Supply improved greatly in Mrauk-U in March, and most essential foods were available. Supply was poorest for ordinary NFIs, but supply of medicines and fuel were unusually good.



Scarce Items

- Fruit
- Baby food
- Cement
- Fuel

Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Kyauktaw, Mrauk-U villages.
- **Lead Time:** 1-2 days.
- **Shipping Costs:** Falling.
- **Example Rates:**



50kg Rice Bag
5,500 MMK
(Mrauk-U town)



Small Car
160,000 MMK
(Mrauk-U town)



Small Truck
-
-



Small Boat
-
-

Retailer Challenges - Mrauk-U village retailers still reported fewer severe challenges than retailers elsewhere, although there were growing worries about access to cash. Despite improved supply, challenges related to transportation and supply remained notable as well.



Pauktaw Township

Village Market

The Pauktaw village market was stable, and supply improved as retailers sourced from multiple townships.

Market hours were stable, and observers still described the market as safe. Market activity remained elevated, and the market served area villages and townships. Supply of fuel and hygiene products improved in March, although food was unchanged and some essential foods were unavailable. Retailers sourced goods from multiple townships. Retailers still struggled with poor transportation and limited supply, but they also began to report weak customer demand.

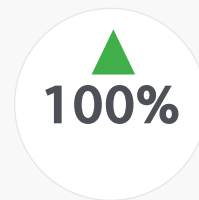


Market Functionality - Market hours were stable, and there was no recent damage or closures. Retailers described the village market as safe.

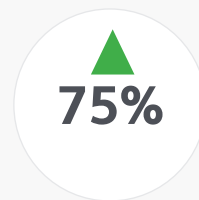
- **Opening Hours:** 6am-4pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Market activity was stable and remained well-above November levels. The market continued serving area villages and townships.

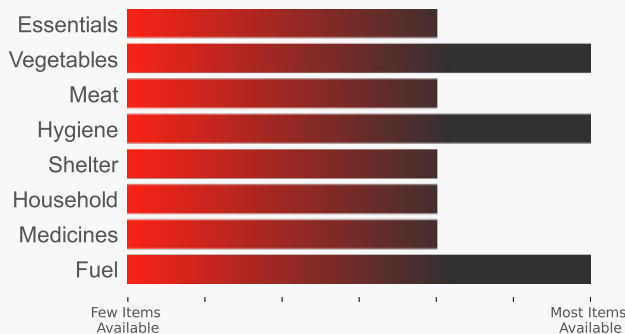
Customers



Retailers



Availability of Goods - Supply improved in Pauktaw in March, particularly for hygiene products and fuel. Availability of food items remained moderate, and a wider variety of NFIs were available.



Scarce Items

- Baby food
- Soap
- Medicines
- Candles

Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Minbya, Sittwe, Toungup, Kyauktaw.
- **Lead Time:** 3-5 days.
- **Shipping Costs:** Falling.
- **Example Rates:**



50kg Rice Bag

-



Small Car
200,000 MMK
(Minbya)



Small Truck
300,000 MMK
(Minbya)



Small Boat

-

Retailer Challenges - Despite improved supply in March, transportation and supply remained the greatest challenges for retailers. Safety-related concerns receded, while concerns about weak demand grew. In general, Pauktaw retailers reported fewer operational challenges than retailers elsewhere in the region.



Ponnagyun Township

Village Market

Market activity declined in Ponnagyun in March, and supply of essential foods and shelter NFIs worsened.

Market hours were stable in March, and observers described the market area as safe. Customer and retailer activity declined amid reports that some who had relocated to Ponnagyun Township began returning to their original townships. Access to fuel improved in March, but availability of NFIs remained poor and supply of essential foods worsened. Retailers supplied goods from Kyauktaw and Mrauk-U. As the Ponnagyun market shrank, retailers' concerns shifted to weak demand and poor access to cash.

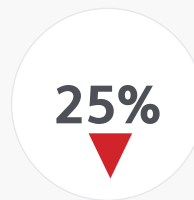


Market Functionality - Market hours were stable, and there was no recent damage or closures. Retailers continued to describe the village market as safe.

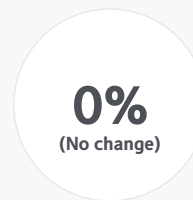
- **Opening Hours:** 6am-4pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Market activity contracted in March, and observers said customers and retailers left the area to return to their original townships.

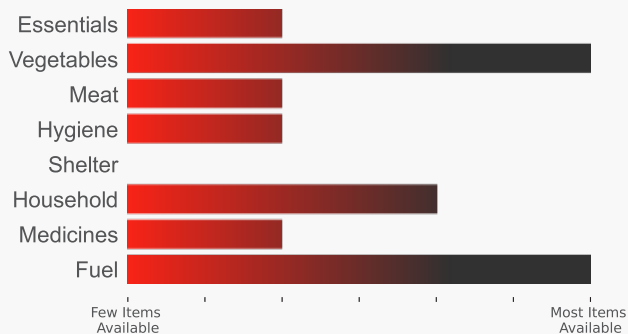
Customers



Retailers



Availability of Goods - Availability of essential foods and shelter NFIs worsened significantly in March, although fuel access improved. Only vegetables were widely available, and availability of NFIs remained very poor.



Scarce Items

- *Baby food*
- *Sugar*
- *Sanitary pads*

Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Kyauktaw, Mrauk-U.
- **Lead Time:** <1 day.
- **Shipping Costs:** Falling.
- **Example Rates:**



50kg Rice Bag
3,000 MMK
(Kyauktaw)



Small Car
400,000 MMK
(Kyauktaw)



Small Truck
600,000 MMK
(Kyauktaw)



Small Boat
-

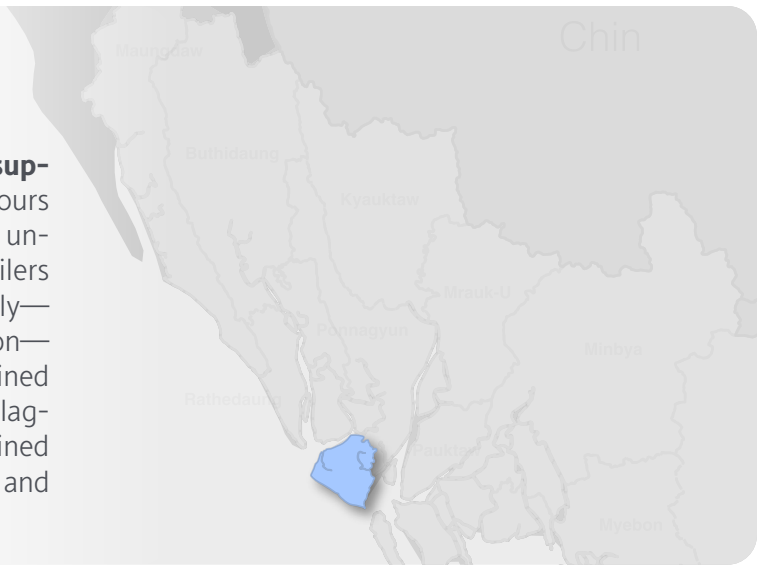
Retailer Challenges - As customer counts declined in March retailers in Ponnagyun reported relatively few major challenges. Worries about adequate supply receded as there were fewer buyers in the market, and retailers' primary concerns shifted to declining demand and poor access to cash for restocking goods.



Sittwe Township

Town Market

Market activity continued to decline in Sittwe as supply shrank and retail challenges mounted. Market hours were stable, but observers said the market area was unsafe. Market activity decline further in March, and retailers remained isolated from surrounding townships. Supply—boosted periodically by sea shipments from Yangon—worsened mid-March, although essential foods remained available. Retailers also sourced goods from Sittwe villages, but lead times were long. Retail challenges remained numerous, with poor safety/security, weak demand, and limited access to cash topping the list.

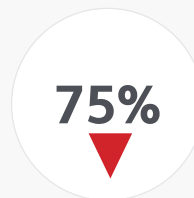


Market Functionality - Market hours were stable, and there was no recent damage or closures, but retailers still described the market as unsafe.

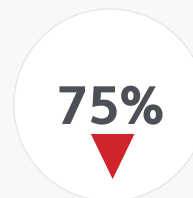
- **Opening Hours:** 5am-3pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** Periodic closures in previous week.

Market Activity - Customer activity fell further in March, and retailers were still few. The market remained isolated, serving only Sittwe town/villages.

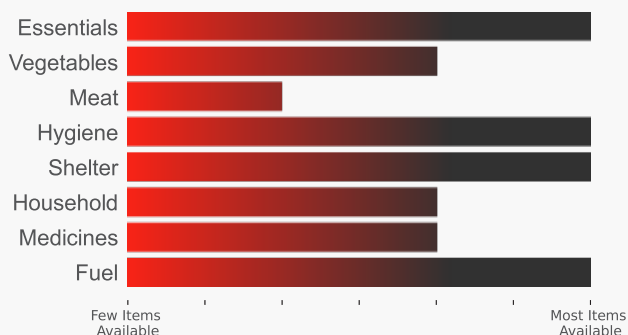
Customers



Retailers



Availability of Goods - Availability of goods in Sittwe worsened somewhat in March. The variety of vegetables, meat, and medicines available dwindled, although most essential foods and other NFIs remained available.



Scarce Items

- *Cooking oil*
- *Meat/fish*
- *Diapers*

Transport & Logistics

- **Inter-Township:** Formal shipping not allowed.
- **Suppliers:** Sittwe villages, Yangon (monthly).
- **Lead Time:** 7 days.
- **Shipping Costs:** Stable.
- **Example Rates:**



50kg Rice Bag
4,000 MMK
(from village)



Small Car

-



Small Truck

-



Small Boat

-

Retailer Challenges - Sittwe retailers continued to face many significant challenges in March. Retailers' worries shifted somewhat from transportation and supply limits to matters of safety, demand, and cash access. Monthly shipments remained a boon for supply but caused inventories to fluctuate week-to-week.



Transport Limits



Supply Limits



Weak Demand



Market Damage



Cash Access



Personal Safety

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).

CONTACT

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