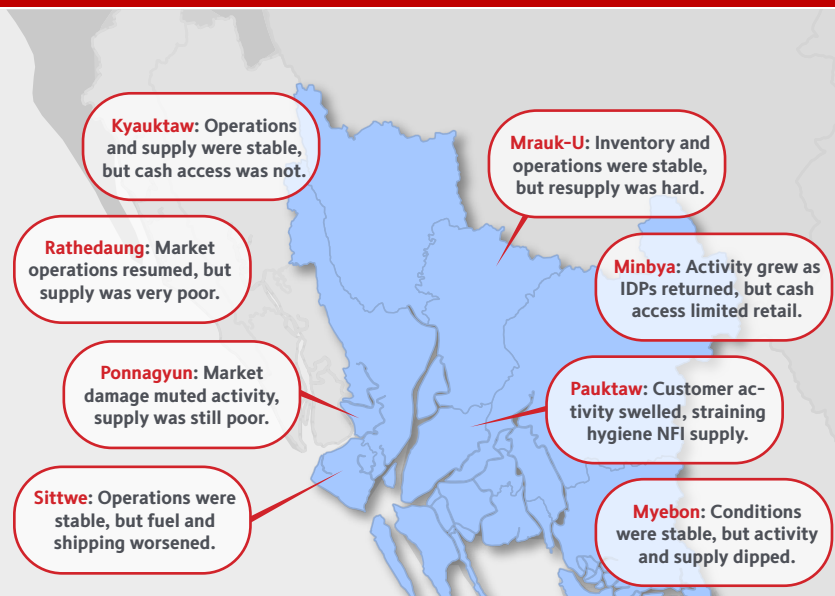


Rapid Market Assessment

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 June 21-23, 2024. Reports available at www.themimu.info/market-analysis-unit.

KEY FINDINGS

- **Most markets operated in mornings only**, although southerly markets were open longer;
- **Market activity increased in Mrauk-U District** as market activity grew with returning IDPs;
- **Conflict altered market dynamics** as market damage pushed customers from Ponnagyun to Pauktaw;
- **Shipping costs climbed**, driven by poor monsoon conditions and trade disruptions with Toungoup;
- **Food and NFI supply was stable**, but supply of food and NFIs was very poor in Rathedaung;
- **Retailers reported more challenges**, both seasonal and conflict-driven, mostly in Mrauk-U District.



Regional Overview

Market Functionality - Markets kept limited morning hours in June, and half saw temporary closures due to security. Markets were open, but only Pauktaw, Ponnagyun, and Myebon stayed open all day. Four of eight markets were described as "unsafe" and just as many experienced temporary closures. Conflict-related damage briefly closed Ponnagyun village market in early-June.

Market Activity - Market activity grew in June as more displaced households returned from villages to towns, where monsoon conditions are easier. Returnees boosted customer activity across Mrauk-U District, especially in Minbya where the main market had yet to reopen and retail was returning only slowly. Customer activity declined in Ponnagyun following conflict-related market damage in early-June, and the shift in customers to Pauktaw market increased activity there.

Availability of Goods - Supply was largely unchanged in June, and supply of NFIs remained poorer than for foods. Supply of medicine and shelter NFIs remained poorest among product types, while supply of vegetables remained the best. Supply of essential foods and hygiene NFIs worsened very slightly in June. Overall, supply was by far poorest in Rathedaung, while it was best in Kyauktaw, Mrauk-U, and Myebon.

Transport & Logistics - Shipping costs increased regionwide in June, possibly driven by difficult monsoon season logistics. There was little change in supply sources in June, and formal inter-townships shipping remained possible outside of Sittwe. However, five of eight townships monitored reported rising shipping costs in June, and retailers said road closures to Toungoup disrupted supply shipments from there.

Retailer Challenges - Minbya and Rathedaung retailers faced steep challenges, but retailers regionwide faced a cash crunch as weak demand hurt revenue. Retail challenges reflected monsoon conditions, such as weak demand, limited working capital, and transportation difficulties. Meanwhile safety-related concerns receded in June, and retail conditions improved particularly in Mrauk-U.

What to Watch

- Limited working capital due to weak demand will likely make **cash access** more difficult for retailers;
- Markets in **Rathedaung** and **Myebon** may see activity grow if more IDP households return to towns;
- Poor supply of **hygiene NFIs** and rising **shipping costs** are likely to further drive up prices.

Kyauktaw Township

Town Market

Kyauktaw Town market was open, supply was decent, and activity grew, but retailers said their cash access was poor. The market still limited activity to mornings only, and occasional closures halted business throughout the month. Customer activity grew in June as some displaced households returned from villages to town. Supply of some NFIs improved, and various foods and NFIs were available in market. Supply arrived from Minbya and Kyauktaw villages, but shipping costs were rising. Poor cash access remained the greatest challenge for retailers, and other challenges—while numerous—grew less severe.



Market Functionality - The market was open during mornings and security improved, but there were still occasional closures for security reasons.

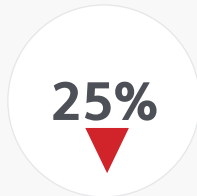
- **Opening Hours:** 6am-12pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** Occasional short-term market closures throughout the month.

Market Activity - Customer activity increased as harsh monsoon-season conditions pushed some households displaced to rural areas to return to town.

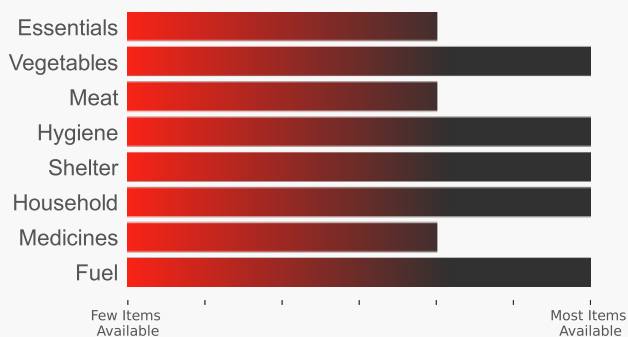
Customers



Retailers



Availability of Goods - Supply of various NFIs improved in June, and supply of fuel and medicines improved in particular. A range of foods and NFIs were available.



Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Local villages in Kyauktaw and Minbya.
- **Lead Time:** 5 days.
- **Shipping Costs:** Rising.
- **Example Rates:**



50kg Rice Bag
5,000 MMK
(Kyauktaw Town)



Small Car
250,000 MMK
(Kyauktaw)



Small Truck
-



Small Boat
100,000 MMK
(Kyauktaw village)

Retailer Challenges - Poor cash access remained the greatest challenge for Kyauktaw retailers in June. Poor transportation, supply, weak demand, and safety continued to trouble retailers, but these challenges were less severe in June than in May.



Minbya Township

Ward Market

Returning IDPs boosted market activity, but the main market remained closed and retailers' poor cash access limited supply. The ward market continued to operate mornings, but occasional closures disrupted operations and conditions were unsafe. Nonetheless, customer activity spiked as more displaced households return to town. Food and NFI supply was stable, but medical supplies were needed. Shipping costs were stable, but lead times from Kyauktaw Townships were slow. Cash access was a major challenge for retailers, but they still regarded safety/security as their greatest concern.

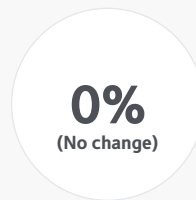


Market Functionality - The ward market was open in mornings, but conditions were unsafe and periodic closures continued.

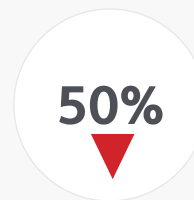
- **Opening Hours:** 5:30am-10:30pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** One or two short-term market closures throughout the month.

Market Activity - Customer activity spiked in June as displaced households increasingly returned to town, but many retailers had not yet returned.

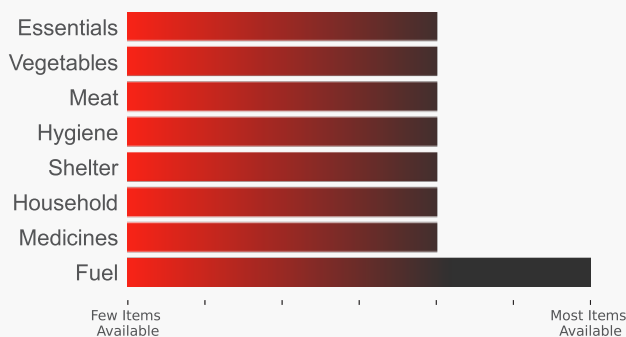
Customers



Retailers



Availability of Goods - Supply was stable in June after improving in May. Overall supply of both foods and NFIs was fairly good, although medical supplies were needed.



Scarce Items

- *Baby products*
- *Medicines*
- *Medical equipment*

Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Kyauktaw.
- **Lead Time:** 5 days.
- **Shipping Costs:** Stable.
- **Example Rates:**



50kg Rice Bag
6,000 MMK
(Mrauk-U)



Small Car
150,000 MMK
(Mrauk-U)



Small Truck
200,000 MMK
(Mrauk-U)



Small Boat
-

Retailer Challenges - Minbya retailers grew more concerned about safety/security in June, but poor cash access also remained a major challenge. Secondary concerns such as poor transportation, poor supply, and weak demand were little-improved in June.



Mrauk-U Township

Ward Market

Inventory was stable and retail activity grew slightly, but trade disruptions with Toungoup hindered supply efforts. The ward market was open mornings and closures were rare, but observers still described the area as unsafe. Customer activity grew slightly as displaced households returned to town, but the main market remained closed. Supply was stable, and it remained poorer for NFIs than for foods. Shipping costs rose in June, and supply lead-times from Toungoup grew longer due to road closures. As such, transportation and supply were retailers' greatest challenge, although safety/security troubled them as well.

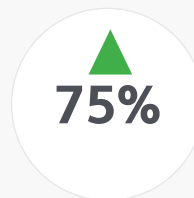


Market Functionality - The Minbya ward market continued to operate in mornings and was free from closures, but market conditions remained unsafe.

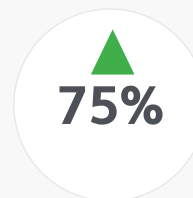
- **Opening Hours:** 6am-12pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous month.

Market Activity - Ward market activity grew slightly as displaced households returned to town; activity was high because the the main market was closed.

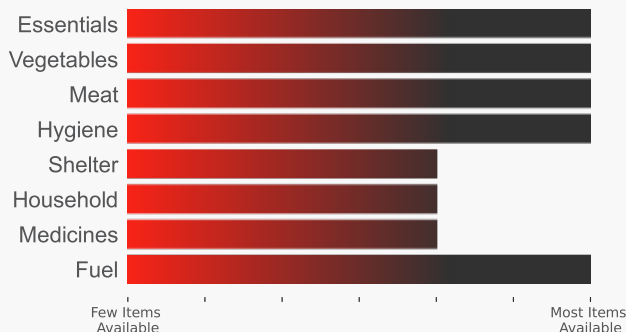
Customers



Retailers



Availability of Goods - Supply was stable in Mrauk-U, and overall supply of both foods and NFIs was fairly good. Fuel supply improved in June, but in general supply remained better for food items than for NFIs.



Scarce Items

- Plastic Tarps
- Umbrellas
- Medicines

Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Kyauktaw villages, Toungup.
- **Lead Time:** 5 days.
- **Shipping Costs:** Rising.
- **Example Rates:**



50kg Rice Bag
8,000 MMK
(Minbya)



Small Car
200,000 MMK
(Minbya)



Small Truck
320,000 MMK
(Kyauktaw)



Small Boat
-

Retailer Challenges - Transportation difficulties were a paramount concern for retailers as road closures disrupted shipments from Toungup. Supply therefore also remained a challenge, and safety/security continued to hinder retailer activity as well.



Myebon Township

Town Market

Myebon Town market kept long hours, but supply dipped and declining customer activity reduced sales and working capital.

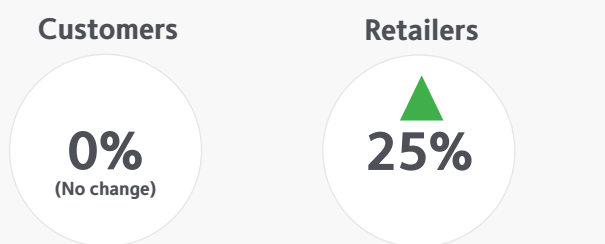
The main market operated throughout the day, and observers said conditions were increasingly safe. Customer activity dipped slightly as poor roads limited visitor traffic from villages. Supply of essential foods, medicines, and fuel dipped slightly in June as shipping costs climbed, but many foods and NFIs were still available. Retailers worried about supply but less so than about flagging demand due to fewer monsoon season customers and the knock-on effect for working capital.



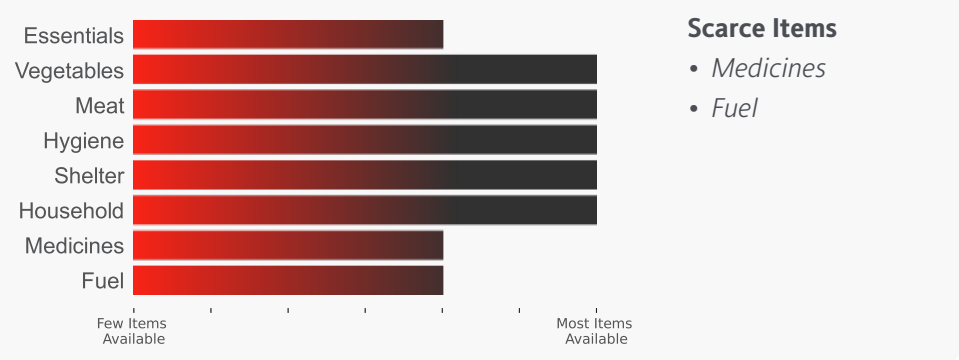
Market Functionality - Myebon Town's main market hours were stable, and observers considered the market area to be very safe. There was no recent damage or closures.

- **Opening Hours:** 5:30am-5pm, daily.
- **Market Security:** Very safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous month.

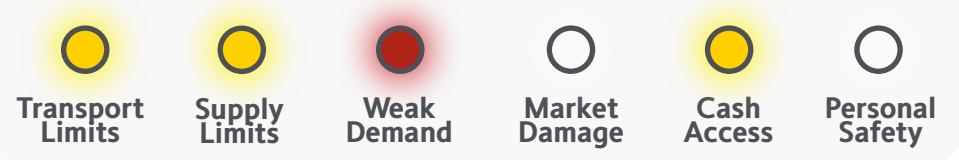
Market Activity - Customer activity shrank slightly in June as poor roads made it difficult for village customers to reach town.



Availability of Goods - Supply worsened slightly in June for critical goods such as essential foods, medicines, and fuel. That said, a variety of foods and NFIs were still available at market.



Retailer Challenges - Myebon retailers continued to struggle with poor demand in June, particularly as fewer village customers frequented the market. Poor transportation and supply due to monsoon weather also remained notable difficulties, and this was reflected in slightly poorer supply of goods.



Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Myebon villages, Toungup, Kan Htaung Gyi.
- **Lead Time:** 3 days.
- **Shipping Costs:** Rising.
- **Example Rates:**

	50kg Rice Bag 15,000 MMK (Kan Htaung Gyi)
	Small Car 225,000 MMK (Minbya)
	Small Truck 250,000 MMK (Myebon village)
	Small Boat 350,000 MMK (Kan Htaung Gyi)

Pauktaw Township

Village Market

Pauktaw market activity grew as customers arrived from Ponnagyun, and this strained supply particularly for hygiene NFIs. The village market operated throughout the day, and observers described it as relatively safe. Market activity spiked in June as security concerns in Ponnagyun pushed more customers to Pauktaw. Supply of hygiene NFIs worsened, but many foods and NFIs were still available. Supply arrived from multiple sources and shipping costs were stable, but lead-times were slow. Nonetheless, transportation challenges and the resulting supply difficulties remained the major challenge for retailers.

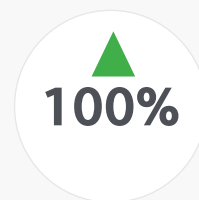


Market Functionality - The village market was open throughout the day, conditions were relatively safe, and there was no recent damage or closures.

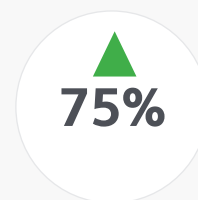
- **Opening Hours:** 6am-5pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous month.

Market Activity - Customer traffic grew in June as some households in Ponnagyun Township shifted to this market for security reasons.

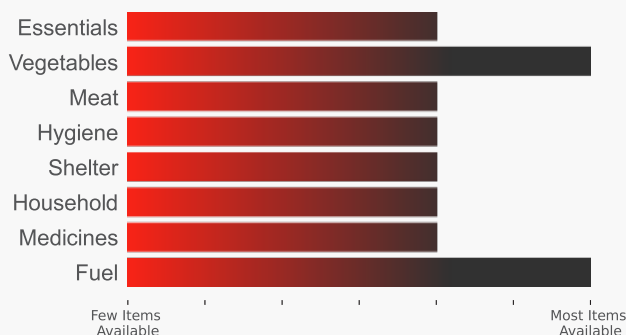
Customers



Retailers



Availability of Goods - Supply of hygiene NFIs worsened in June, but supply of other items was fairly stable. Many but not all common foods and NFIs were still available in the market.



Scarce Items

- Purified water
- Packaged foods

Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Kyauktaw, Minbya, Ann.
- **Lead Time:** 3 days.
- **Shipping Costs:** Stable.
- **Example Rates:**



50kg Rice Bag
-



Small Car
185,000 MMK
(Minbya)



Small Truck
800,000 MMK
(Kyauktaw)



Small Boat
1,500,000 MMK
(Pauktaw village)

Retailer Challenges - In June retailers struggled most with resupplying goods, which they said required long and costly shipping and led to low standing inventories. Weak demand and the limited cash reserves that come with it also continued to trouble retailers.



Ponnagyun Township

Village Market

Market damage in early-June reduced customer activity, and worsening supply of hygiene items made poor NFI supply worse. Conflict-related damage to several shops closed the market in early-June, but operations stabilized by late-June. Some customers shifted to Pauktaw for safety reasons, however a large number of displaced households boosted activity. Supply of hygiene NFIs worsened in June, and NFI supply overall was poor. Shipping costs remained stable, and Kyauktaw was still a key supplier. Safety was a major concern after the market closure, but so too was the subsequent dip in customer activity.

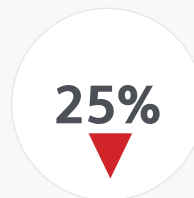


Market Functionality - Conflict-related damage shuttered the market in early-June, but it soon resumed operations. By late-June observers nonetheless described the market as relatively safe.

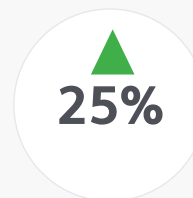
- **Opening Hours:** 5am-5pm, daily.
- **Market Security:** Safe.
- **Market Damage:** Shops damaged in early-June.
- **Closures:** Several short-term market closures during the month.

Market Activity - Retailer activity grew as some IDPs began selling goods at market, but overall activity fell as market damage sparked safety concerns.

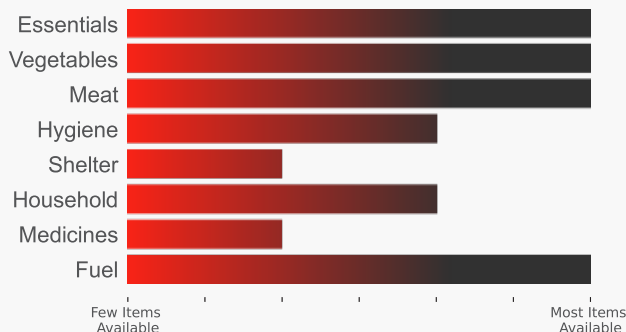
Customers



Retailers



Availability of Goods - NFI supply remained poor in the Ponnagyun village market, and supply of hygiene NFIs worsened in June. A variety of foods were still available, and supply of meat/fish improved slightly.



Scarce Items

- n/a

Transport & Logistics

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



50kg Rice Bag
5,000 MMK
(Kyauktaw)



Small Car
150,000 MMK
(Kyauktaw)



Small Truck
250,000 MMK
(Kyauktaw)



Small Boat
-

Retailer Challenges - Ponnagyun village retailers saw challenges grow again in June. Retailers worried most about transportation limits but also safety concerns and weakening demand after damage to the market in early-June kept customers away.



Rathedaung Township

Village Market

The Rathedaung village market was open mornings, but operations were sporadic, supply poor, and retail challenges numerous. The village market was open during mornings, but there were periodic closures and observers described the area as unsafe. Market activity was stable but low relative to last year. Supply of foods was mediocre and supply of NFIs was poor. Shipping costs were rising and supply lead-times from Kyauktaw were slow. Rathedaung retailers faced many severe challenges, particularly the cash crunch that comes with poor supply and weak demand.



Market Functionality - The Rathedaung village market operated during mornings, but there were periodic closures and observers describe the area as unsafe.

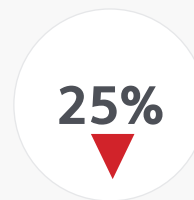
- **Opening Hours:** 6am-1pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** Occasional short-term market closures throughout the month.

Market Activity - Market activity was stable but below normal levels, even though customers continued to arrive from neighboring villages.

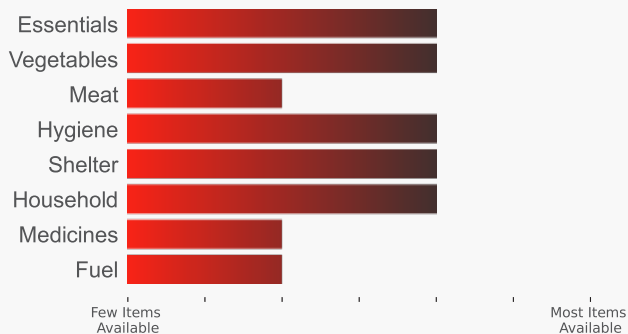
Customers



Retailers



Availability of Goods - Supply of food and NFIs in the Rathedaung village market was fairly poor, and NFI supply was especially poor. Fuels and medicines were not well supplied, particularly plastic tarps.



Scarce Items

- Plastic tarps
- Medicines

Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Kyauktaw.
- **Lead Time:** 4-6 days.
- **Shipping Costs:** Rising.
- **Example Rates:**



50kg Rice Bag
6,000 MMK
(Kyauktaw)



Small Car

-



Small Truck

-



Small Boat
425,000 MMK
(Kyauktaw)

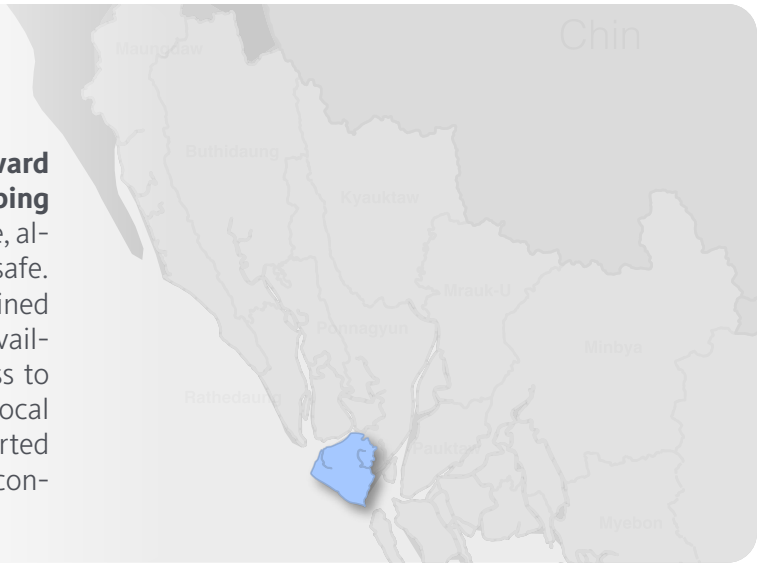
Retailer Challenges - Rathedaung village retailers faced many severe business challenges in June. Weak demand—and the cash limitations that come with it—were among the most serious challenges reported in June, although supply and transportation were very difficult as well.



Sittwe Township

Ward Market

Operations and supply were stable at the Sittwe ward market, but fuel access worsened and local shipping costs rose. Ward market operations were stable in June, although observers still regarded the market area as unsafe. Market activity was stable, but customer counts remained very low. Supply was also relatively stable, although availability of fuel and vegetables declined in June. Access to transportation and supply remained very limited, and local shipping costs were rising again. Sittwe retailers reported facing many challenges in June, but safety/security continued to be their greatest difficulty.

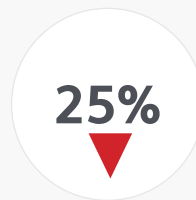


Market Functionality - Ward market operations remained stable in June, although observers continued to describe the area as unsafe.

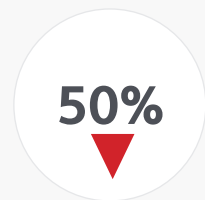
- **Opening Hours:** 6am-10:30am, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous month.

Market Activity - Market activity was stable in the Sittwe ward market, but both customer and retailer counts remained low.

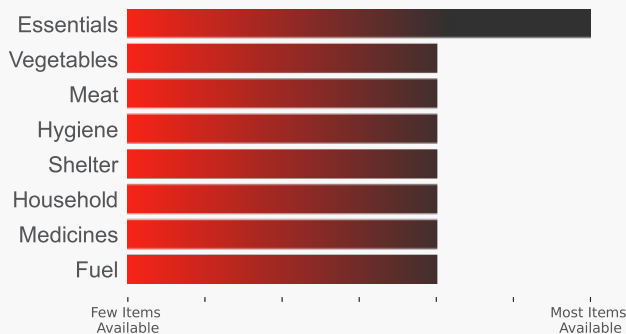
Customers



Retailers



Availability of Goods - Supply at the Sittwe ward market was relatively stable again in June, although supply of fuel and vegetables worsened. Some NFIs such as charcoal and diapers were very scarce.



Scarce Items

- *Fish paste*
- *Charcoal*
- *Diapers*

Transport & Logistics

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



50kg Rice Bag
7,000 MMK
(within Sittwe)



Small Car

-



Small Truck

-



Small Boat

-

Retailer Challenges - Sittwe ward market retailers continued to report multiple challenges in June, but poor safety/security remained paramount among them. Poor transportation and supply remained difficult as it has been for months, and retailers increasingly worried about poor cash access.



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 month 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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