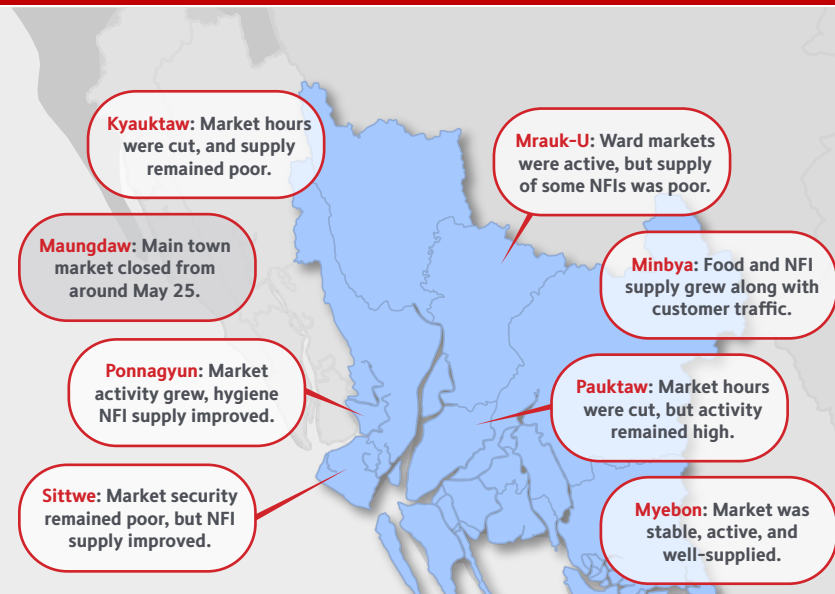


# Rapid Market Assessment

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 May 21-25, 2024. Reports available at [www.themimu.info/market-analysis-unit](http://www.themimu.info/market-analysis-unit).

## KEY FINDINGS

- **Conflict shuttered Maungdaw market**, and spill-over concerns affected Kyauktaw and Mrauk-U;
- **Markets reduced operating hours in May**, and five-of-seven operated only in the morning;
- **Customer traffic remained stable** despite seasonal change and growing security concerns;
- **Lower fuel prices reduced shipping costs**, and most markets saw growing inter-township trade;
- **Food and NFI supply improved somewhat** after interstate highways partially reopened mid-May;
- **Retailers reported more challenges** both seasonal and conflict-driven, especially in Mrauk-U District.



## Regional Overview

**Market Functionality - Markets were open in May, but some reduced hours due to security concerns.** Five of seven markets monitored in May were open only in the morning, including several in major towns. Market hours were reduced in Kyauktaw, Mrauk-U, and Pauktaw.

**Market Activity - Markets remained active in May, and there was more inter-township commerce.** Markets in Kyauktaw, Ponnagyun, and Myebon were particularly active in May. Ward markets in Mrauk-U, Minbya, and Sittwe were naturally quieter but still saw relatively stable customer traffic. Minbya, Myebon, Pauktaw, and Ponnagyun saw more intra-township trade in May, possibly due to lower fuel costs in May.

**Availability of Goods - Supply of food and NFIs improved in May, possibly due to looser travel restrictions on interstate highways.** Supply was generally stable or improved, perhaps due to more movement on interstate roads (which nonetheless remained unsafe). Supply improved most for scarce NFIs like medicines and hygiene items, and fuel supply improved as prices fell. Supply improved most in Sittwe and Minbya Towns, where some foods and NFIs were more available.

**Transport & Logistics - Lower fuel prices helped re-**

**duce shipping costs in multiple markets in May.** Shipping costs declined in Sittwe, Ponnagyun, Minbya, and Mrauk-U, although they rose in Kyauktaw and held stable elsewhere. Retailers continued sourcing goods both by road and waterway, and some lead-times shortened slightly. Meanwhile, Sittwe retailers still remained largely isolated from markets in neighboring townships.

**Retailer Challenges - Retail challenges increased in May, particularly in Mrauk-U District.** Retailers in Kyauktaw, Mrauk-U, and Minbya reported more challenges in May than in April, particularly related to poor cash access and market damage. Retailers in Sittwe and Ponnagyun also reported growing challenges, particularly related to security and transportation. Overall, poor safety/security, limited transportation, and poor access to supply remained the most common retail challenges.

## What to Watch

- Conflict in **Maungdaw** or elsewhere may yet prevent more stable nearby markets from rebounding;
- Lower **fuel** prices could boost trade and improve food supply in areas with little wet-season harvest;
- Supply of **hygiene** and **shelter NFIs** remains particularly important as monsoon season deepens.

# Kyauktaw Township

## Town Market

**Kyauktaw market hours were reduced to just mornings in May, and there was no improvement in supply.**

The market operated only in the mornings due to frequent jet/drone activity in the area. Market activity nonetheless remained stable even as observers regarded the market area as unsafe. Supply of many goods remained somewhat poor, although vegetable supply was still good. Retailers ordered supply from Minbya and local villages, but shipping costs were rising. Retailers reported more challenges in May than in April, particularly related to weak demand and cash access.



**Market Functionality** - Kyauktaw Town market remained open in May, but market hours were reduced to mornings-only for security reasons.

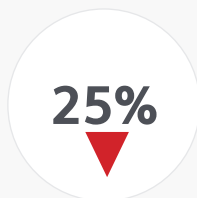
- **Opening Hours:** 6am-12pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** Afternoon closure and occasional short-term market closures due to jet activity.

**Market Activity** - Market activity in Kyauktaw Town was stable in May despite reduced hours. Customers still arrived from nearby towns and villages.

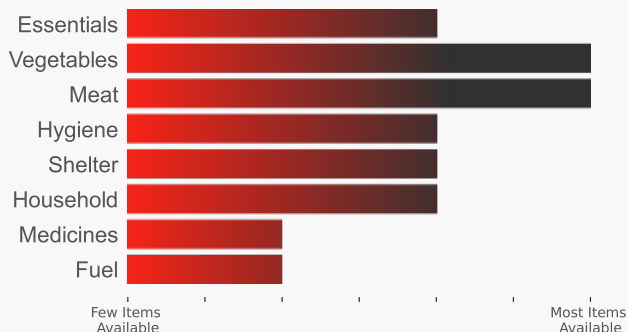
Customers



Retailers



**Availability of Goods** - Supply was largely unchanged in May, and supply of various NFIs remained mediocre. Supply of fuel and medicines remained poor, while vegetable supply remained fairly good.



**Scarce Items**

- Medicines
- Fuel

### Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Local villages, Minbya.
- **Lead Time:** 3 days.
- **Shipping Costs:** Rising.
- **Example Rates:**



**50kg Rice Bag**  
3,000 MMK  
(Kyauktaw Town)



**Small Car**  
275,000 MMK  
(Mrauk-U)



**Small Truck**  
350,000 MMK  
(Minbya)



**Small Boat**  
650,000 MMK  
(Kyauktaw village)

**Retailer Challenges** - Kyauktaw retailers reported more severe challenges in May than in April. As the lean-season set in, retailers worried most about weak demand and poor access to cash for working capital. Transportation, supply, and safety all remained challenges albeit less pressing.



# Minbya Township

## Ward Market

**Supply improved in Minbya Town ward markets, and more customers arrived from area villages.** Ward markets continued to operate during mornings in May, but there were more short-term closures related to security and conditions remained relatively unsafe. Market activity remained muted, but more customers visited from nearby areas. Supply of food and NFIs improved in May, but some goods were still unavailable. Retailers supplied from Kyauktaw, and some reported falling shipping costs. Retailers worried most about infrastructure damage following recent artillery damage to the (closed) main market.

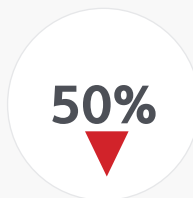


**Market Functionality** - Ward markets remained open, but there were periodic closures and observers still described the market environment as unsafe.

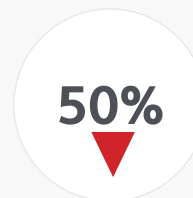
- **Opening Hours:** 5am-10:30pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** Occasional short-term market closures due to nearby drone activity.

**Market Activity** - Minbya ward markets remained just half their original size, but more customers visited from neighboring townships in May.

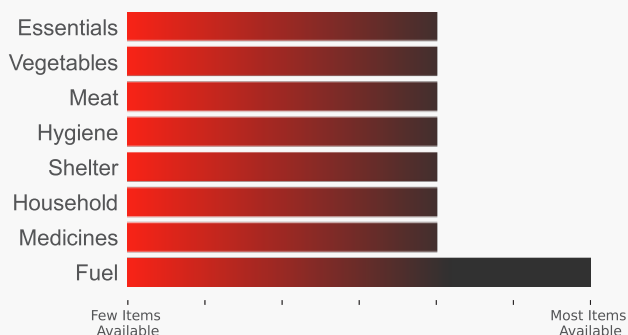
### Customers



### Retailers



**Availability of Goods** - Supply of food and NFIs improved in Minbya in May, although some goods were still unavailable. Supply of essential foods, fuel, medicines, and NFIs related to hygiene and shelter all improved.



### Scarce Items

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

## Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Kyauktaw.
- **Lead Time:** 1-5 days.
- **Shipping Costs:** Falling.
- **Example Rates:**



**50kg Rice Bag**  
4,500 MMK  
(Mrauk-U)



**Small Car**  
150,000 MMK  
(Mrauk-U)



**Small Truck**  
230,000 MMK  
(Mrauk-U)



**Small Boat**  
-

**Retailer Challenges** - Retailers in Minbya's ward markets faced growing challenges in May as monsoon season took shape. Cash access was a growing challenge as demand faltered. However, retailers were most concerned about safety and infrastructure damage, as artillery recently damaged the closed main market.



# Mrauk-U Township

## Ward Market

**Mrauk-U main market remained closed in May, and supply of some NFIs worsened while others improved.**

Mrauk-U ward markets kept regular morning hours, and activity was high even though observers described the area as unsafe. Many goods remained available, but supply of shelter NFIs worsened in May and plastic tarps were increasingly scarce. Shipping costs fell in May as fuel prices retreated somewhat. Mrauk-U retailers worried most about safety/security, but they continued to face a broad array of other challenges such as transportation limits and poor cash access amid flagging demand.

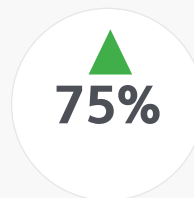


**Market Functionality** - Ward markets operated only in the morning in May, and there were no recent closures. Market security remained relatively unsafe.

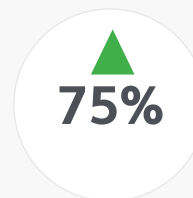
- **Opening Hours:** 6am-12pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

**Market Activity** - Market activity was unchanged, and ward market activity remained elevated as the Mrauk-U main market stayed closed.

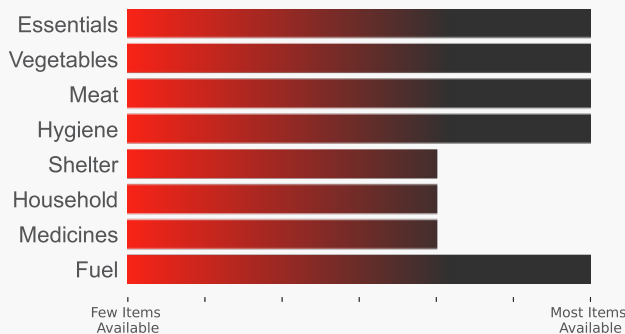
### Customers



### Retailers



**Availability of Goods** - Supply of various NFIs worsened in Mrauk-U in May, although availability of fuel and hygiene NFIs improved. Supply was better for food items than for NFIs.



### Scarce Items

- Medicines
- Clothes
- Plastic Tarps
- Construction items

## Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Kyauktaw, Mrauk-U villages.
- **Lead Time:** 1-5 days.
- **Shipping Costs:** Falling.
- **Example Rates:**



50kg Rice Bag  
-



Small Car  
250,000 MMK  
(Kyauktaw)



Small Truck  
-



Small Boat  
-

**Retailer Challenges** - Retailers in Mrauk-U Town reported facing many business-related challenges in May. Safety/security was their greatest concern, as conflict escalated in nearby Maungdaw Township. Transportation, supply, weak demand, damage and poor access were all notable concerns reported by retailers.





# Myebon Township

## Town Market

**Myebon market was stable and active in May, and food and NFI inventories were quite good.** Market hours were stable and conditions were described as relatively safe and free from damage. Customers regularly visited the market from neighboring villages and townships. Many goods were available from most product categories, including medicines and fuel. Shipping costs were stable, and retailers supplied goods from Toungup with fairly short lead-times. Retailers reported relatively few business-related difficulties, but transportation, supply and safety/security were nonetheless persistent challenges.

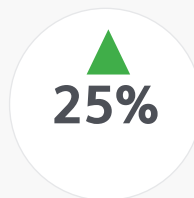


**Market Functionality** - Market hours were stable, and there was no recent damage or closures. Retailers described the village market as safe.

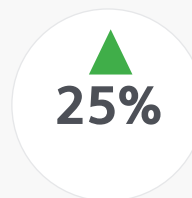
- **Opening Hours:** 6:00am-5:30pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

**Market Activity** - Market activity was slightly above 2023-levels, and customers arrived from area villages and townships.

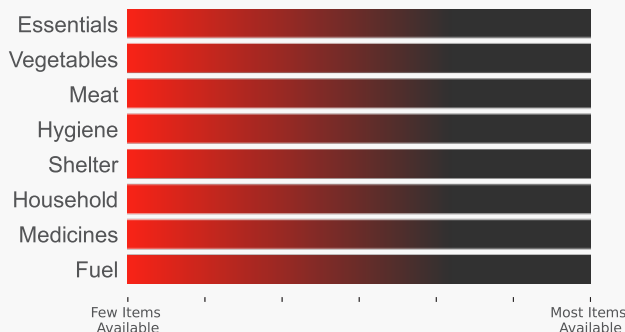
### Customers



### Retailers



**Availability of Goods** - Supply both foods and NFIs was very good in Myebon Town market in May. Eggs, green chili, and some processed foods were among the items that were occasionally scarce.



### Scarce Items

- Eggs
- Wheat flour
- Green chili

## Transport & Logistics

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



**50kg Rice Bag**  
10,000 MMK  
(Toungup)



**Small Car**  
200,000 MMK  
(Minbya)



**Small Truck**  
250,000 MMK  
(Myebon village)



**Small Boat**  
300,000 MMK  
(Kan Htaung Gyi)

**Retailer Challenges** - Myebon retailers faced fewer challenges than those in other markets. Transportation limits and poor access to supply remained somewhat challenging even though many items were relatively well stocked. Poor cash access was also somewhat challenging in May.



# Pauktaw Township

## Village Market

### Security concerns reduced Pauktaw market hours in May, but activity remained high and supply stable.

The village market operated only in mornings due to concerns about damage from artillery, but observers still described it as safe and market activity remained high. Some foods grew more scarce in April, but in general supply was decent and stable. Shipping costs increased in May as retailers ordered supply from Toungup, Kyauktaw, and Myebon. Retailers' greatest challenge related to weak monsoon-season demand, but supply and transportation remained notable challenges as well.

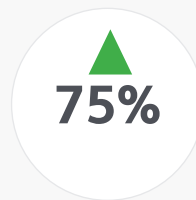


**Market Functionality** - Market hours were reduced in May due to security concerns, but there was no recent damage and observers still described it as safe.

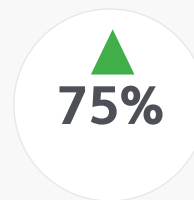
- **Opening Hours:** 6am-11am, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

**Market Activity** - Market activity was stable and remained well-above late-2023 levels. The market increasingly served neighboring township customers.

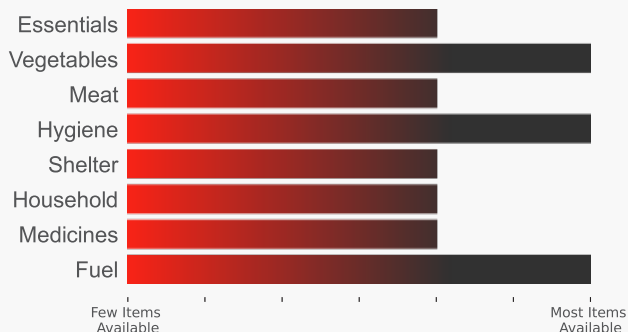
#### Customers



#### Retailers



**Availability of Goods** - Supply was stable in Pauktaw again in May, where many but not all foods and NFIs were available. Supply of essential foods and NFIs was somewhat poorer than for vegetables and fuel.



#### Scarce Items

- *Vegetables*
- *Packaged noodles*

### Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Myebon, Toungup, Kyauktaw.
- **Lead Time:** 2-3 days.
- **Shipping Costs:** Rising.
- **Example Rates:**



**50kg Rice Bag**  
25,000 MMK  
(Minbya)



**Small Car**  
200,000 MMK  
(Kyauktaw)



**Small Truck**  
550,000 MMK  
(Kyauktaw)



**Small Boat**  
300,000 MMK  
(Minbya)

**Retailer Challenges** - Limited supply and weak monsoon demand remained the largest challenge for Pauktaw village retailers in May. Poor transportation and cash access were again cited by retailers as challenging, while safety/security remained largely absent from the challenges reported.



# Ponnagyun Township

## Village Market

**Market activity grew in the Ponnagyun village in May, and supply of some NFIs improved.** Market hours were stable in May, and the village market grew more active as customers increasingly visited from neighboring townships. Supply of food items remained good and availability of hygiene NFIs improved considerably in May, but supply of medicines and many other NFIs remained poor. Shipping costs fell in May, yet transportation and supply remained among the challenges retailers faced. Although the market area was described as safe retailers still considered security a notable business challenge.

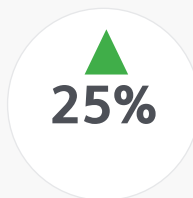


**Market Functionality** - Market hours were stable, and there was no recent damage or closures. Retailers continued to describe the village market as safe.

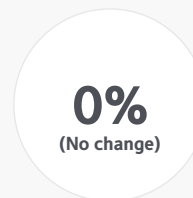
- **Opening Hours:** 6am-5pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

**Market Activity** - Village market activity grew in May, and activity was high. More customers began arriving from neighboring townships.

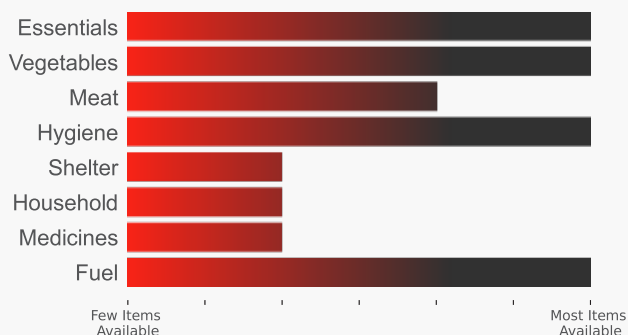
### Customers



### Retailers



**Availability of Goods** - Supply of hygiene NFIs improved considerably in May, but other NFIs remained poorly-supplied. Medicines and shelter/household NFIs were still quite scarce.



### Scarce Items

- Shelter NFIs
- Medicines

## Transport & Logistics

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



**50kg Rice Bag**  
5,000 MMK  
(Mrauk-U)



**Small Car**  
150,000 MMK  
(Kyauktaw)



**Small Truck**  
250,000 MMK  
(Kyauktaw)



**Small Boat**  
-

**Retailer Challenges** - Ponnagyun village retailers reported more challenges in May than in April. Poor safety/security, limited transportation, and poor access to supply were the most significant challenges reported by retailers in May.



**Transport Limits**



**Supply Limits**



**Weak Demand**



**Market Damage**



**Cash Access**

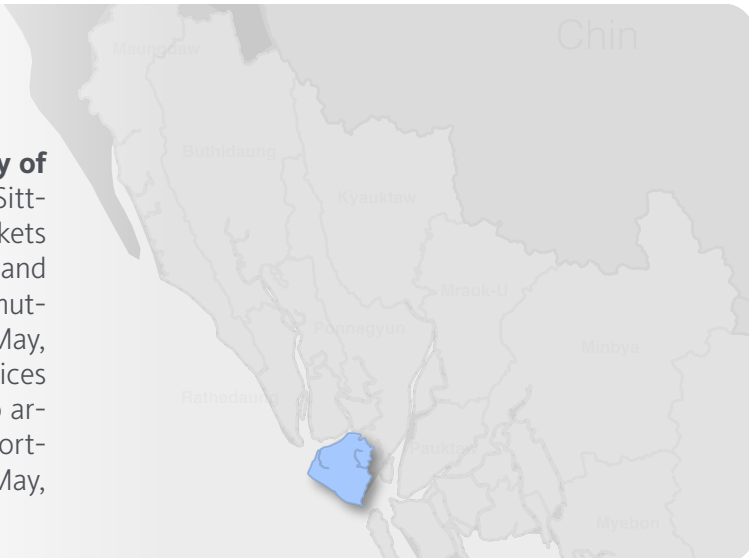


**Personal Safety**

# Sittwe Township

## Ward Market

**Ward markets in Sittwe remained active and supply of NFIs improved in May, yet security remained poor.** Sittwe customers continued to rely on morning ward markets as the main market was still mostly inactive. Customer and retailer activity in the ward markets was stable but muted in May. Availability of various NFIs improved in May, and fuel supply improved as prices fell. Lower fuel prices pushed shipping costs down, but supply continued to arrive primarily from Sittwe villages. Sittwe retailers reported facing greater challenges related to security in May, and transportation/supply remained difficult.

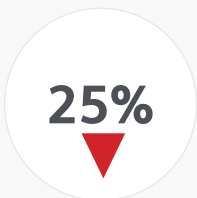


**Market Functionality** - Ward market operations and hours were stable in May, but observers still described commercial areas as unsafe.

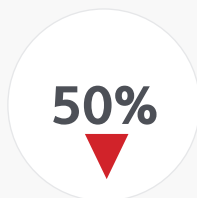
- **Opening Hours:** 6am-10am, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** Periodic closures in previous week.

**Market Activity** - Market activity remained muted in Sittwe ward markets in May and well below normal levels, but some customers still visited from villages.

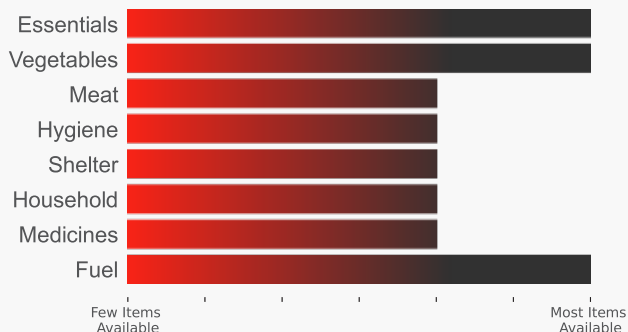
### Customers



### Retailers



**Availability of Goods** - Supply of NFIs improved in Sittwe in May after declining in April, and fuel supply in particular improved. Various NFIs were available in May, and foods and vegetables remained fairly well-stocked.



### Scarce Items

- Fish paste
- Charcoal
- Diapers
- Shoes

## Transport & Logistics

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



**50kg Rice Bag**  
25,000 MMK  
(Sittwe village)



**Small Car**

-



**Small Truck**

-



**Small Boat**

-

**Retailer Challenges** - Sittwe ward market retailers still reported relatively few challenges in May, although challenges related to security grew more severe. Challenges related to poor transportation and supply also grew more severe in May, although they were less prominent than poor security.



**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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