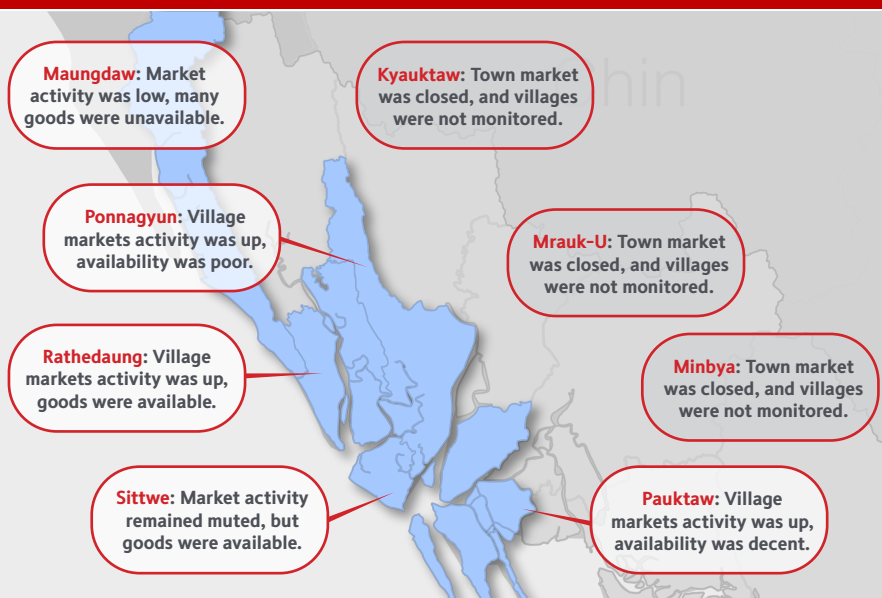


Rapid Market Assessment

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 Feb. 10-13, 2024. Reports available at www.themimu.info/market-analysis-unit.

KEY FINDINGS

- **Village markets swelled with activity** as most town markets remained closed;
- **Busy markets still lacked many foods and NFIs** but all markets had at least some critical goods;
- **Fuel and medicines were scarce**, and cooking oil and hygiene products were often unavailable;
- **Retailers sourced goods from other townships**, but transport costs continued to drive prices up;
- **Retailers' largest challenge was transportation** and its impact on price and supply;
- **Customers may lack cash to buy available goods**, as retailers cited weak demand in busy markets.



Regional Overview

Market Functionality - Village markets remained open even as town markets closed. Town markets in Sittwe and Maungdaw continued operating, and village markets remained open in other townships.¹ Open markets followed regular hours.

Market Activity - Village market activity increased as they absorbed volume from closed town markets. Town markets shrank and village markets grew as displaced households filled rural areas and retail followed. Prominent village markets in Ponnagyun and Rathedaung swelled with activity, although this did not always result in increased availability of goods.

Availability of Goods - Fuel and medicines were scarce, and many foods and NFIs were unavailable. Markets offered a variety of local winter vegetables, but some other goods were hard to find. Low-quality rice was available in village markets (near mills), but regional imports (e.g., NFIs) were more often unavailable.

Transport & Logistics - Retailers still sourced goods from neighboring townships, although transport costs continued rising. Some retailers still sourced goods from neighboring townships, while others were deterred and made do with dwindling inventories.

¹Data were collected prior to the Feb. 29 incident at Sittwe market.

Retailer Challenges - Retailers struggled with high transport costs and a resulting drought in supply. Retailers reported weak demand even in village markets with increasing customers, possibly pointing to cash-poor households with little money to spend. Cash access (among retailers) was most challenging for Sittwe retailers but less so among those in villages.

Possible Interventions - Retailers felt they could increase local supply with added support. Retailers expressed a willingness and ability to increase supply under more favorable circumstances. Freedom of movement for traders and fuel subsidies or other support for transportation costs were most likely to spur supply, while low-interest loans were less likely. Village retailers appeared more likely than those in towns to increase supply, possibly because village markets have grown.

What to Watch

- It remains unclear if increased activity in **village** markets will translate to wider availability of goods;
- Poor **cash** access may be limiting purchases even in markets where goods are available;
- Local food supply may worsen as **vegetable** season winds down and less new **rice** enters the market.

Maungdaw Township

Town Market

Maungdaw market remained operational, but activity was down sharply and many goods were unavailable.

Market hours were stable in early-February, and observers described the market area as safe. Fewer than half of the market's usual customers and retailers remained. Most vegetables were available, but many other foods and NFIs were not, and medicines were scarce. Retailers reported facing a wide variety of challenges, particularly transportation and supply difficulties but also lack of basic safety during their typical retail activities. Retailers sourced goods primarily from Bangladesh.

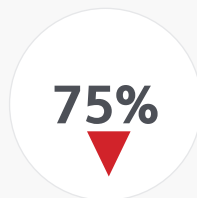


Market Functionality - Market hours were stable, and there was no recent damage or closures. Retailers described the market environment as safe.

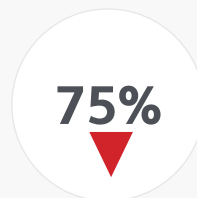
- **Opening Hours:** 6am-3pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Market activity remained far lower than normal. Customers arrived from Maungdaw villages but rarely from other townships.

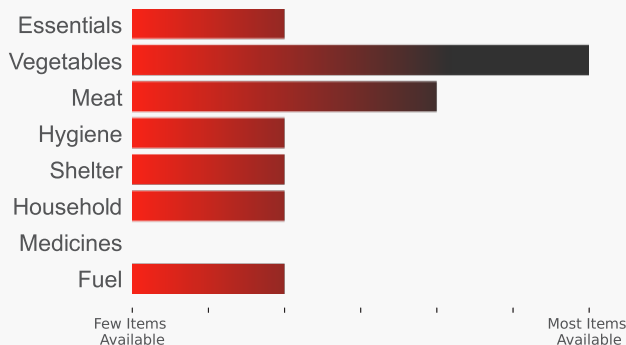
Customers



Retailers



Availability of Goods - Availability of most goods was poor in the market. There was only a narrow variety of foods and NFIs available, and medicines were largely unavailable. However, most local vegetables were available.



Scarce Items

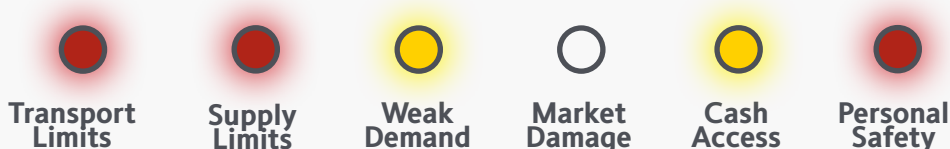
- *Rice, cooking oil*
- *Garlic, onion*
- *Sanitary pads*
- *Medicines*
- *Fuel*

Transport & Logistics -

Informal trade between townships continued, but costs continued to rise. Retailers supplied goods primarily from Bangladesh.

Item	Availability
50kg Rice Bag	-
Small Car	-
Small Truck	-
Small Boat	-

Retailer Challenges - Transportation, supply, and person safety were the most significant challenges for Maungdaw village retailers. Retailers in Maungdaw reported a more major challenges than those in other markets monitored, and safety was a major concern.



Pauktaw Township

Village Market

The Pauktaw village market had grown since November, and product availability was relatively broad. Market hours were stable in early-February, and observers described the market area as safe. Customer activity had increased since November as new IDPs arrived, and there were new retailers as well. Many foods and most NFIs were available, although access to fuel was poor. Transportation and safety remained major concerns for retailers, and they said demand was weak despite the influx of new customers. Retailers mainly sourced goods from Ponnagyun Township.

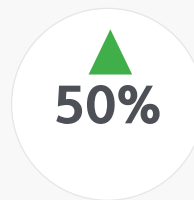


Market Functionality - Market hours were stable, and there was no recent damage or closures. Retailers described the market environment as safe.

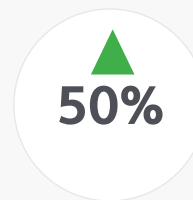
- **Opening Hours:** 7am-4pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Market activity was higher due to the closure of Pauktaw town market. Customers visited from villages but not from other townships.

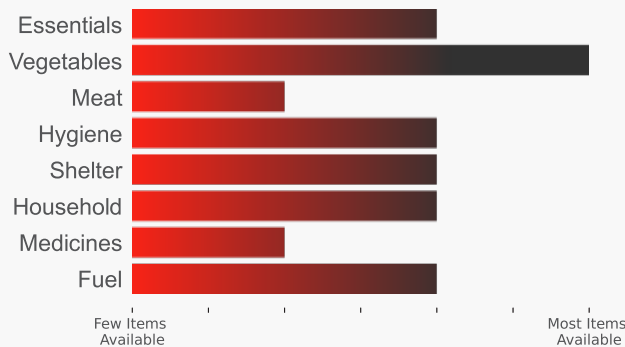
Customers



Retailers



Availability of Goods - A modest variety of foods and NFIs were available in the market. Most medicines and household NFIs were unavailable in the market, but many other foods and NFIs were available as were most local vegetables.



Scarce Items

- *Cooking oil*
- *Chicken, dried fish*
- *Sanitary pads*
- *Medicines*
- *Fuel*

Transport & Logistics

Informal trade between townships continued, but costs continued to rise. Retailers supplied goods primarily from Ponnagyun township.

	50kg Rice Bag	-
	Small Car	-
	Small Truck	-
	Small Boat	-

Retailer Challenges - Transportation, supply, and person safety were the most significant challenges for Pauktaw village retailers. Although a variety of goods were available in the village, supply concerns were more prominent here than in other markets monitored. Retailers remained very concerned about personal safety as well.



Ponnagyun Township

Village Market

Activity in the Ponnagyun village market had doubled since the town market closed, but supply was poor.

Market hours were stable in early-February, and observers described the market area as safe. The market doubled in size after the town market closed, but it still offered only a narrow variety of goods. Many vegetables were available, but few other foods and NFIs were on offer and medicines were scarce. Retailers here reported fewer challenges than those elsewhere, but transportation was a major challenge and demand was still weak. Retailers sourced goods from locations in Sittwe and Kyauktaw Townships.

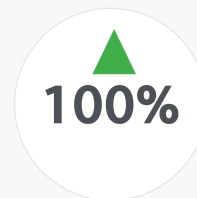


Market Functionality - Market hours were stable, and there was no recent damage or closures. Retailers described the market environment as safe.

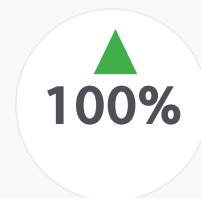
- **Opening Hours:** 6am-5pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Market activity had doubled since November as the market became a local hub for customers from villages in Ponnagyun and elsewhere.

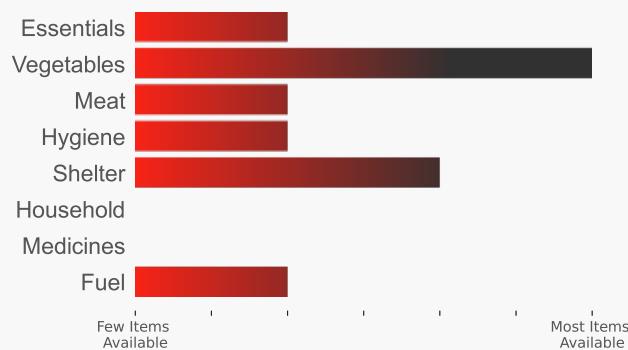
Customers



Retailers



Availability of Goods - Only vegetables were widely available in the market. Medicines and household NFIs were unavailable—partly due to the absence of retailers offering them—and there were only a few types of foods and NFIs.



Scarce Items

- *Cooking oil*
- *Garlic, onion*
- *Detergent, diapers*
- *Medicines*
- *Fuel, gas lighters*

Transport & Logistics -

Informal trade between townships continued, but costs continued to rise. Retailers supplied goods from Sittwe and Kyauktaw townships.



50kg Rice Bag
(from Sittwe)
15,000 MMK



Small Car
-



Small Truck
(from Sittwe)
300,000 MMK



Small Boat
-

Retailer Challenges - Transportation and supply were the most significant challenges for Ponnagyun village retailers. Although many goods were not available, this was due in part to the narrow variety of retailers at the market. Retailers who were present reported fewer major challenges than those in other markets monitored.



Rathedaung Township

Village Market

The Rathedaung village market had grown as new IDPs arrived, and supply was relatively good. Market hours were stable in early-February, and observers described the market area as safe. Customer activity had doubled since November as new IDPs arrived, and new retailers had followed. Many foods and most NFIs were available, although fuel was particularly limited. Transportation and safety remained major concerns for retailers, and they lamented weak demand despite the influx of new customers, possibly due to limited spending power among households. Retailers sourced goods from multiple townships.

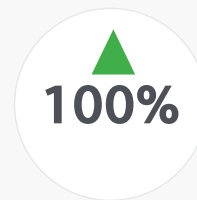


Market Functionality - Market hours were stable, and there was no recent damage or closures. Retailers described the market environment as safe.

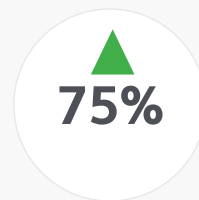
- **Opening Hours:** 7am-6pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Market activity had doubled since November, and the market was serving villages customers as well as some from other townships.

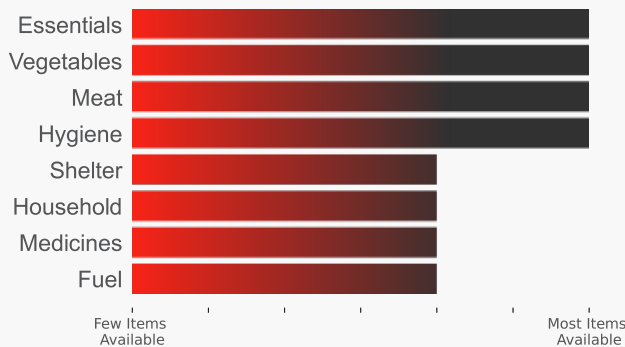
Customers



Retailers



Availability of Goods - Many foods and some NFIs were available in the market, but the availability of NFIs was not as robust as food items. Overall, availability in this large village market was better than in other markets monitored.



Scarce Items

- *Biscuits/crackers*
- *Fuel*

Transport & Logistics

Informal trade between townships continued, but costs continued to rise. Retailers supplied goods from Sittwe, Buthidaung, and Kyauktaw townships.

- 50kg Rice Bag**
(from Sittwe)
25,000 MMK
- Small Car**
(from Sittwe)
600,000 MMK
- Small Truck**
-
- Small Boat**
-

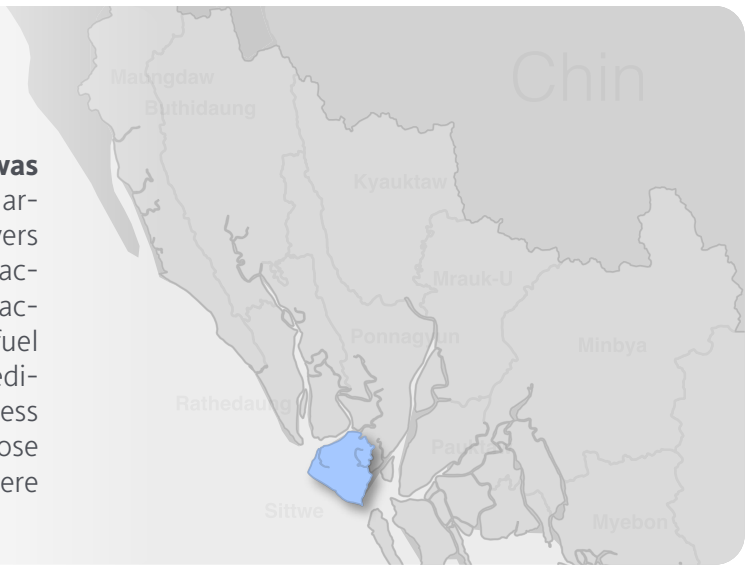
Retailer Challenges - Transportation, personal safety, and weak demand were the most significant challenges for Rathedaung village retailers. Weak demand was more of a concern in Rathedaung than in other markets monitored, despite a growing numbers of customers there; this may be due to increased competition among retailers and/or a lack of cash among customers to buy goods.



Sittwe Township

Town Market

Sittwe town market was operational, but activity was muted and availability of some goods was poor. Market hours were stable in early-February, and observers described the market area as safe. However, customer activity was half what it was in November, and retailer activity was down even more sharply. The availability of fuel and meat/fish products was very poor, and some medicines and essential foods were unavailable. Cash access was more problematic for Sittwe retailers than for those elsewhere, but other challenges were generally less severe than in other markets monitored.

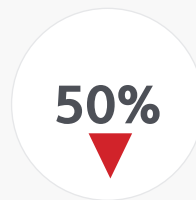


Market Functionality - Market hours were stable, and there was no recent damage or closures. Retailers described the market environment as safe.

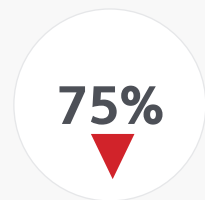
- **Opening Hours:** 7am-4:30pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Market activity was half of November levels, and many retailers had left. The market mostly served Sittwe townships customers.

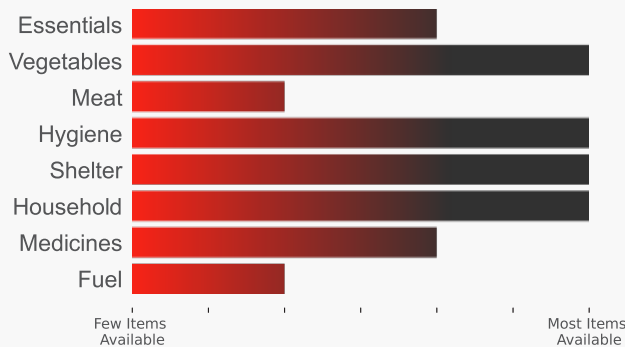
Customers



Retailers



Availability of Goods - A variety of foods and NFIs were available in the market. Most vegetables and NFIs were available, but supply was poor for some medicines and essential foods and fuel and meat/fish were growing scarce.



Scarce Items

- *Cooking oil*
- *Rice, garlic, onion*
- *Fish Paste*
- *Fuel*

Transport & Logistics -

Informal trade between townships continued, but costs continued to rise. Retailers supplied often goods from villages in Sittwe township.



50kg Rice Bag
(from village)
5,000 MMK



Small Car
(from village)
35,000 MMK



Small Truck
-



Small Boat
-

Retailer Challenges - Transportation, supply, and demand were the most significant challenges for Sittwe retailers. Most challenges were felt less severely in Sittwe than in other markets monitored, except for access to cash which. Access to cash was not Sittwe retailers' top concern, but it was more challenging in Sittwe than elsewhere.



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

Shipping Cost: Example one-way shipping costs provided by retailers during the week of data collection.

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

Market Analysis Unit
market.analysis.unit@gmail.com

