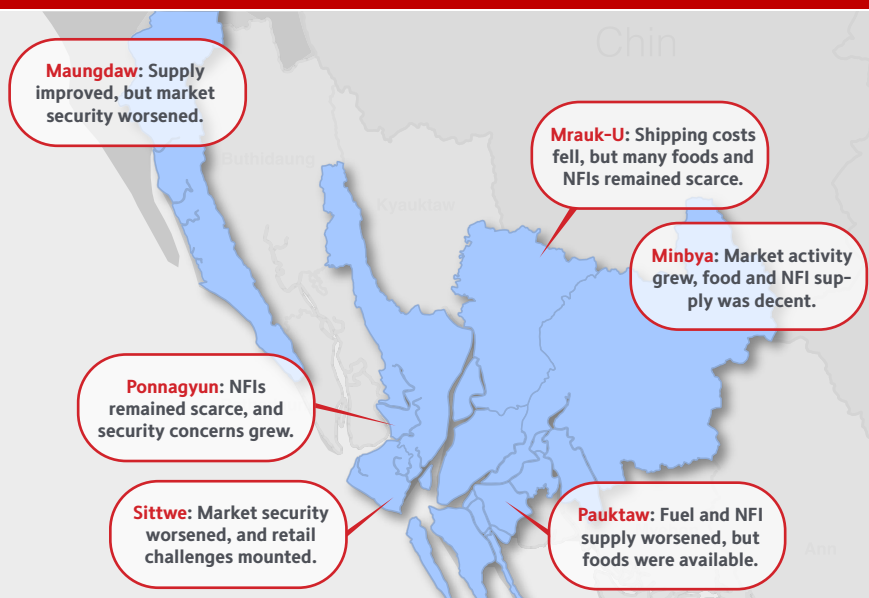


# Rapid Market Assessment

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. 24-26, 2024. Reports available at [www.themimu.info/market-analysis-unit](http://www.themimu.info/market-analysis-unit).

## KEY FINDINGS

- **Sittwe and Maungdaw market security declined**, but markets in other townships remained stable;
- **Transportation costs outside of Sittwe fell** as some inter-township movement was permitted;
- **Essential food supply improved in some markets**, but not in the Mrauk-U or Pauktaw markets;
- **Fuel and medicines remained scarce regionwide**, and many NFIs were in short supply;
- **Transportation and supply remained difficult**, but challenges waned slightly in villages;
- **Town markets outside Sittwe may reopen** if security and mobility improvements are maintained.



## Regional Overview

**Market Functionality - All markets monitored remained open, but security worsened at town markets.** Security in and around Sittwe and Maungdaw markets declined in late-February, although these and other village markets still remained functional and there were no reports of recent damage.<sup>1</sup>

**Market Activity - Town markets remained muted while village markets remained more active.** Pauktaw village market grew more active in late-February, while other village markets remained larger than they once were. Only the Pauktaw and Ponnagyun village markets served many customers from other townships.

**Availability of Goods - Supply varied by market, but fuel and medicines were still scarce regionwide.** Many goods were unavailable in village markets in late-February, although vegetables remained common and essential food inventories improved slightly. Supply was better in Maungdaw and Sittwe than in villages due to a recent shipment by sea, but retailers expected the benefits to be short-lived. Fuel, medicines and other NFIs remained scarce across the region.

**Transport & Logistics - Transportation outside of Sittwe and Maungdaw improved in late-February, and**

**shipping costs fell.** Looser transportation restrictions allowed village retailers to order supply from neighboring townships. Retailers in Sittwe and Maungdaw did not see similar improvements however, and trade with neighboring townships remained difficult, costly, and uncommon for retailers in these towns.

**Retailer Challenges - Challenges multiplied for town retailers while village conditions eased slightly.** Safety and security took on new urgency for Sittwe and Maungdaw retailers who increasingly faced a wide range of business challenges. Meanwhile, village retailers in other townships (from which Sittwe and Maungdaw remained largely isolated) remained most concerned about transportation and supply; however, weak demand, poor cash access, and safety also remained notable concerns.

## What to Watch

- Retail activity in **Maungdaw** and **Sittwe** may become harder as markets grow isolated and insecure;
- Looser movement restrictions may further reduce **transportation** costs and in turn market prices;
- It remains to be seen if or when improved security beyond Sittwe may enable **town** markets to reopen.

<sup>1</sup>Data were collected shortly before to the Feb. 29 Sittwe market closure.

# Maungdaw Township

## Town Market

**Maungdaw market remained open and supply improved slightly, but security conditions worsened.**

Market hours were stable in late-February, but observers described the market area unsafe. Customer and retailer activity remained low, and visitors from nearby villages declined further. Most vegetables were still available and supply improved slightly, but medicines were scarce and fuel access was dire. Retailers continued to face a wide range of challenges, but they were most concerned about safety and access to cash. Retailers sourced goods from Bangladesh and villages in Buthidaung and Rathedaung.

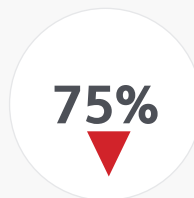


**Market Functionality** - Market hours were stable, and there was no recent damage or closures, but retailers said the market environment was very unsafe.

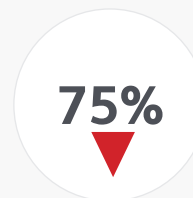
- **Opening Hours:** 7:30am-5pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

**Market Activity** - Market activity remained far lower than normal, and the number of customers from Maungdaw villages had declined in recent weeks.

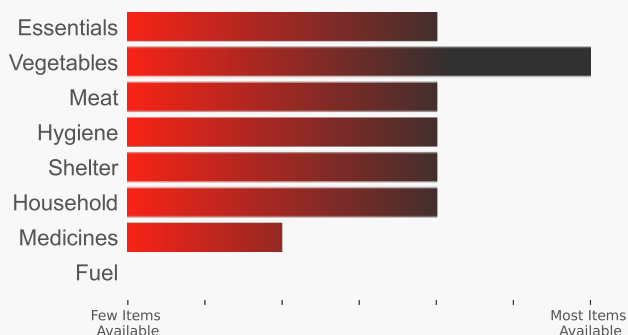
### Customers



### Retailers



**Availability of Goods** - Supply of essential foods and NFIs improved in Maungdaw as transportation and supply worries faded slightly. Fuel access remained dire, and availability of medicines remained very poor.



### Scarce Items

- *Cooking oil, pulses*
- *Fruits*
- *Chicken*
- *Sanitary pads*
- *Fuel*

## Transport & Logistics

- **Inter-Township:** Formal shipping not allowed.
- **Suppliers:** Buthidaung, Rathedaung, Bangladesh.
- **Lead Time:** Unsure.
- **Shipping Costs:** Rising.
- **Example Rates:**

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

**Small Car**  
-

**Small Truck**  
-

**Small Boat**  
-

**Retailer Challenges** - Maungdaw retailers continued to face multiple challenges, the most notable of which were poor cash access, weak demand, and safety/security. Transportation limits and poor supply remained difficult, but retailers placed new emphasis on poor cash access and weak demand. Security remained a persistent challenge for Maungdaw retailers.



# Minbya Township

## Village Market

**The Minbya village market had grown since the town market closed, yet foods and NFIs were still limited.**

Market hours were stable in late-February, and observers described the market area as safe. Customer activity increased since November, and the market served customers from nearby townships. Most foods and many NFIs were available, but fuel, medicines, and shelter NFIs were limited. Transportation and supply were retailers' greatest concerns, but weak demand, poor cash access, and safety also troubled them. Retailers sourced goods by boat from Myebon Township and shipping costs were falling.



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

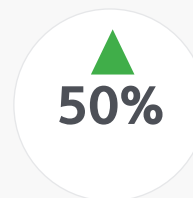
- **Opening Hours:** 6am-5pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

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

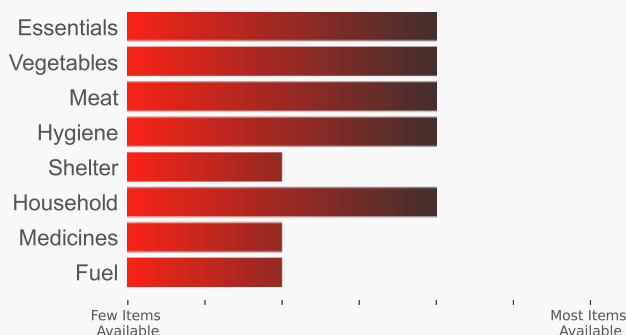
### Customers



### Retailers



**Availability of Goods** - A number foods and NFIs were available in the village market, but supply of shelter items, medicines, and fuel was poor. Availability was poorer for NFIs than for foods.



### Scarce Items

- *Baby products*
- *Medicines*

## Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Myebon.
- **Lead Time:** Unsure.
- **Shipping Costs:** Falling.
- **Example Rates:**



**50kg Rice Bag**  
2,000 MMK  
(Myebon)



**Small Car**

-



**Small Truck**

-



**Small Boat**

-

**Retailer Challenges** - Minbya village retailers reported facing multiple business-related challenges. Transportation and supply limits were the most significant challenges for retailers, but retailers also said lack of security, poor access to cash, and weak demand for goods were notable challenges.



## Mrauk-U Township

### Village Market

**The Mrauk-U village market had grown since the town market closed, yet supply of goods was very poor.**

Market hours were stable in late-February, and observers described the market area as safe. Customer activity had grown since November, but the market served only area villages. Very few foods and NFIs were available in the market, but supply local vegetables was robust. Retailers struggled with transportation limits, poor supply, and weak demand. Retailers sourced goods from villages in Mrauk-U and Kyauktaw Township, and shipping costs were falling in recent weeks.

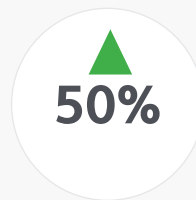


**Market Functionality** - Market hours were stable, and there was no recent damage or closures. Retailers described the village market as safe.

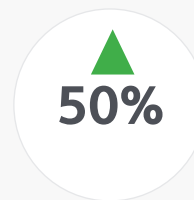
- **Opening Hours:** 6am-6:30pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

**Market Activity** - Market activity was up since November. The market served area villages, but customers rarely arrived from other townships.

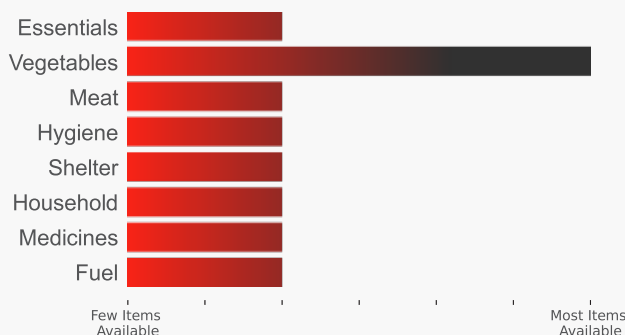
#### Customers



#### Retailers



**Availability of Goods** - Availability of most goods was very poor in the market. Local vegetables were widely available, however there was only a very narrow variety of other foods and NFIs.



### Transport & Logistics

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



**50kg Rice Bag**  
6,000 MMK  
(Kyauktaw)



**Small Car**  
1.5 lakh MMK  
(Kyauktaw)



**Small Truck**  
-  
-



**Small Boat**  
-  
-

**Retailer Challenges** - Mrauk-U village retailers reported fewer challenges than other markets in the region. Difficulties related to transportation, supply, and demand were most notable, but retailers appeared less concerned about these than might be expected.



**Transport Limits**



**Supply Limits**



**Weak Demand**



**Market Damage**



**Cash Access**



**Personal Safety**

# Pauktaw Township

## Village Market

**The Pauktaw village market grew more active in recent weeks, but supply of goods did not improve greatly.**

Market hours were stable in late-February, and observers still described the market as safe. Village market activity was nearly double November levels, and it now served area villages. Availability of fuel and various NFIs worsened in recent weeks, but vegetables and some essential foods were available. Retailers reported fewer challenges in late-February than they did two weeks earlier, but transportation and supply were still very difficult. Retailers supplied goods from Minbya and other nearby townships.

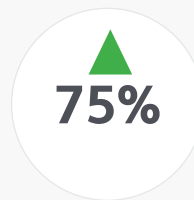


**Market Functionality** - Market hours were stable, and there was no recent damage or closures. Retailers described the village market as safe.

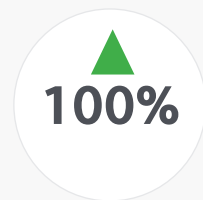
- **Opening Hours:** 6am-4pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

**Market Activity** - Market activity grew further in late-February, but customers remained limited to area villages and very few came from other townships.

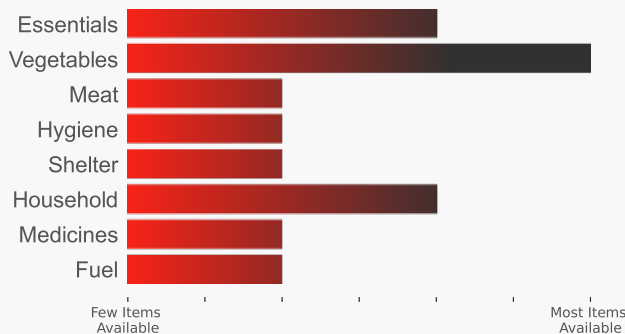
### Customers



### Retailers



**Availability of Goods** - Availability of fuel and hygiene/shelter NFIs worsened in late-February, while supply of other goods was unchanged. Local food supply continued to be better than supply of NFIs.



### Scarce Items

- *Cooking oil*
- *Sanitary pads*
- *Medicines*
- *Fuel*

## Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Minbya, Ann, Mrauk-U, Kyauktaw.
- **Lead Time:** Unsure.
- **Shipping Costs:** Falling.
- **Example Rates:**



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



**Small Car**  
5 lakh MMK (Minbya)



**Small Truck**  
10 lakh MMK (Minbya)



**Small Boat**  
-

**Retailer Challenges** - Pauktaw retailers described a less challenging business environment in late-February compared to earlier in the month, but transportation and supply remained significant difficulties. Safety remained a challenge but less so than before, and concerns about poor demand diminished as customer activity in the village grew.



# Ponnagyun Township

## Village Market

**NFI supply remained poor in the Ponnagyun village market, and customer activity fell slightly.** Market hours were stable in late-February, and observers described the market area as safe. Customer activity waned slightly in recent weeks but remained far higher than in November. Availability of essential foods improved in recent weeks, but supply of most NFIs remained poor. Retailers said they faced many challenges, and security concerns had grown in recent weeks. Transportation and supply remained the most significant challenges. Retailers sourced goods from Kyauktaw and shipping costs were falling.

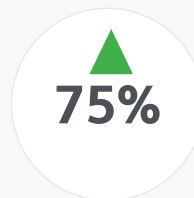


**Market Functionality** - Market hours were stable, and there was no recent damage or closures. Retailers described the village market as safe.

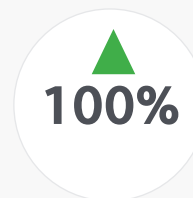
- **Opening Hours:** 6am-5pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

**Market Activity** - Market activity remained far higher than in November, but customer activity fell slightly in recent weeks.

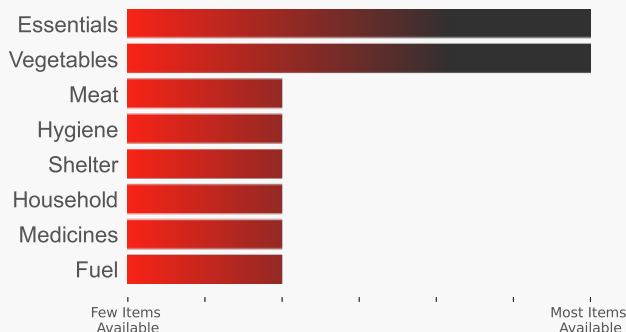
### Customers



### Retailers



**Availability of Goods** - Availability of essential foods improved in late-February, and supply of medicines and NFIs improved a little. In general, the availability of NFIs remained very poor in the Ponnagyun village market.



### Scarce Items

- *Garlic, onion*
- *Soap, baby diapers*
- *Medicines*

## Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Kyauktaw, Sittwe.
- **Lead Time:** Unsure.
- **Shipping Costs:** Falling.
- **Example Rates:**



**50kg Rice Bag**  
7,000 MMK  
(Kyauktaw)



**Small Car**  
5 lakh MMK  
(Kyauktaw)



**Small Truck**  
15-30 lakh MMK  
(Kyauktaw)



**Small Boat**  
-

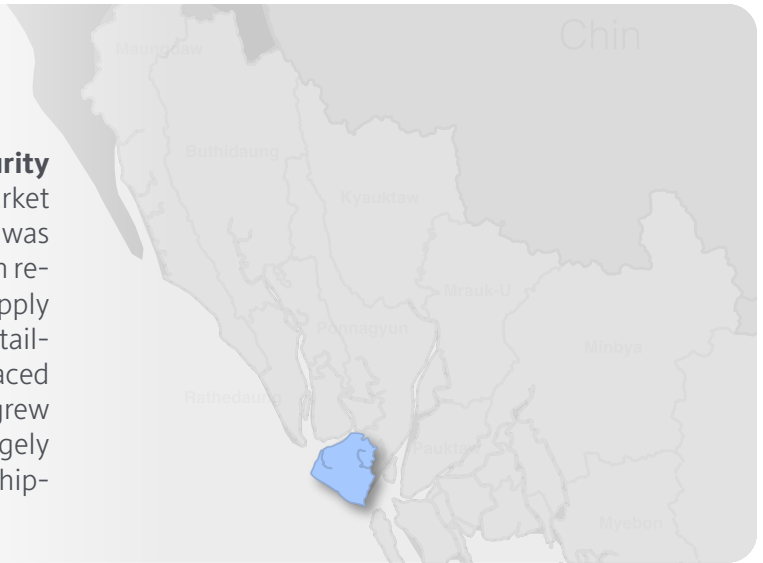
**Retailer Challenges** - Poor transportation and supply remained the most significant challenges for Ponnagyun village retailers, while weak demand and poor cash access also remained noteworthy difficulties. Poor safety/security became more of a concern in late-February, but this was still not retailers' greatest challenge.



# Sittwe Township

## Town Market

**Sittwe market continued to function, but security worsened and challenges were multiplying.** Market hours were stable, but observers said the market area was very unsafe. Market activity remained muted, and town retailers still served only area villages. A mid-month supply shipment boosted availability of foods and NFIs, but retailers expected the increase to be short-lived. Retailers faced numerous significant challenges as security concerns grew and access to cash worsened. Sittwe retailers were largely cut-off from those in other Rakhine townships, and shipping costs remained very high.

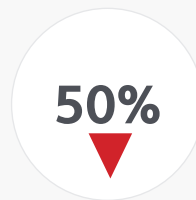


**Market Functionality** - Market hours were stable, and there was no recent damage or closures. Retailers described the market environment as safe.

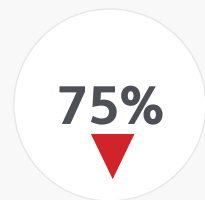
- **Opening Hours:** 5am-2pm, daily.
- **Market Security:** Very unsafe.
- **Market Damage:** No recent damage.
- **Closures:** Periodic closures in previous week.

**Market Activity** - Market activity remained just half November levels, and retailer counts shrank even more. The market did not serve other townships.

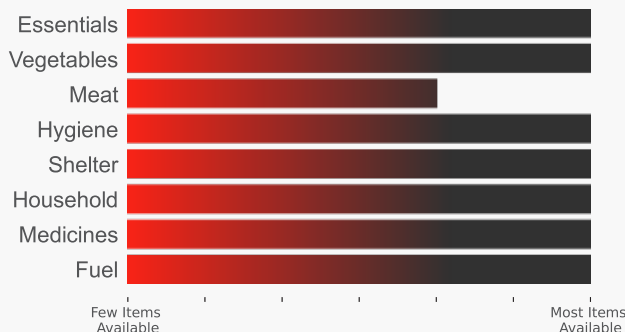
### Customers



### Retailers



**Availability of Goods** - A wide variety of foods and NFIs were available in Sittwe market in late-February, but retailers said this improvement was due to a monthly supply shipment and would not likely be sustained.



### Scarce Items

- *Rice, cooking oil*
- *Garlic, fruits*
- *Dried chili*

## Transport & Logistics

- **Inter-Township:** Formal shipping not allowed.
- **Suppliers:** Sittwe villages, Ponnagyun.
- **Lead Time:** Unsure.
- **Shipping Costs:** Stable.
- **Example Rates:**



**50kg Rice Bag**  
30,000 MMK  
(Ponnagyun)



**Small Car**

-



**Small Truck**

-



**Small Boat**

-

**Retailer Challenges** - Sittwe retailers faced many significant challenges. Poor transportation and supply remained major difficulties, and poor safety and cash access were much larger concerns than in early-February. Retailers said a monthly shipment of goods improved the short-term supply outlook, but long-term supply issues remained. Weak demand remained a concern.



## 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**

Market Analysis Unit  
[market.analysis.unit@gmail.com](mailto:market.analysis.unit@gmail.com)

