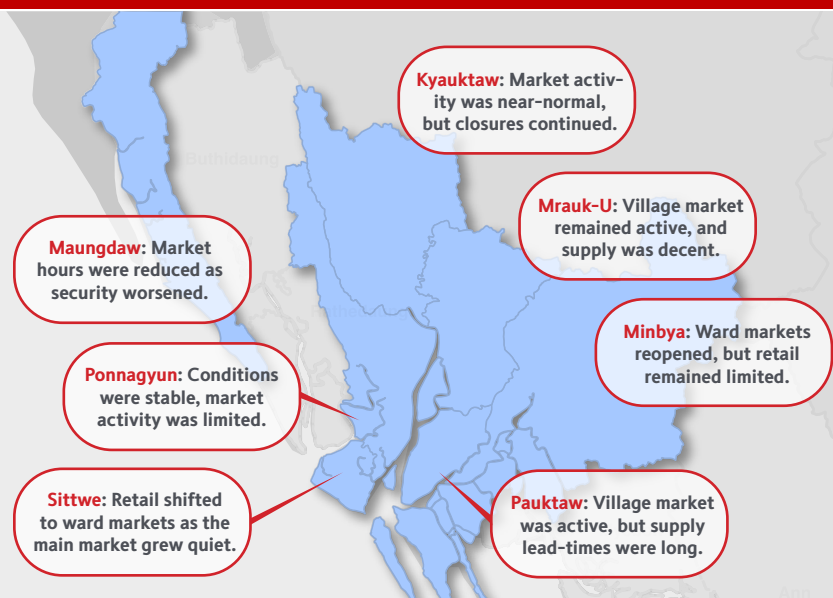


Rapid Market Assessment

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 April 21-22, 2024. Reports available at www.themimu.info/market-analysis-unit.

KEY FINDINGS

- **Market operations varied by township** based on very different local security conditions;
- **Kyauktaw and Minbya markets gained new life** while Maungdaw and Sittwe markets grew quieter;
- **Supply of vegetables and fuel worsened in April** as part of a trend with little sign of changing soon;
- **Medicine and hygiene NFIs were most scarce**, although NFIs in general were often unavailable;
- **Mrauk-U and Pauktaw markets functioned best**, and supply improved in Mrauk-U again in April;
- **Maungdaw retailers still faced dire challenges**, and shipping costs rose in Maungdaw in Sittwe.



Regional Overview

Market Functionality - Market operations continued to vary regionally based on security conditions. Operations resumed in Minbya Town in April, but Maungdaw and Sittwe operated irregularly. Security conditions improved slightly but remained tenuous in some markets.

Market Activity - Some markets continued to regain life, but Sittwe and Maungdaw remained subdued. Activity increasingly returned to Minbya and Kyauktaw Town markets, despite lingering security risks there. Village markets in Pauktaw and Ponnagyun remained swollen due to the loss of nearby town markets. Maungdaw market activity dipped further in April, and Sittwe activity shifted to ward markets. Most markets still served only nearby villages as fuel costs limited customer movement.

Availability of Goods - Supply of fuel and vegetables worsened in April, but supply was otherwise stable. Availability of vegetables worsened as local production declined regionally, and fuel supply worsened after improving slightly in March. Supply was poorest in Maungdaw, Sittwe, and Minbya Towns, with the latter two relying mostly on ward markets which seldom sell NFIs.

Transport & Logistics - Shipping costs rose further in Sittwe and Maungdaw but were stable elsewhere.

Shipping costs outside of Sittwe stabilized in April after two months of moderate price relief. Retailers continued sourcing goods from neighboring townships, and several paid high prices to order goods from Yangon via Toun-gup. Sittwe and Maungdaw markets still remained isolated in the region and faced rising shipping costs.

Retailer Challenges - Retailers in some markets reported fewer challenges in April than in March. Retailers in Kyauktaw and Mrauk-U reported fewer challenges related to supply and cash access as market activity there grew. Yet retailers in Maungdaw continued to face multiple severe hurdles to selling goods. Safety/security and weak demand were common concerns, while worries about poor cash access receded slightly (in part due to greater prominence in April of ward retailers, who mostly sell vegetables and require less working capital).

What to Watch

- Market activity will likely grow in **Minbya** amid reports of the town market reopening in early-May;
- High **fuel** costs may yet deter trade between growing markets in Kyauktaw, Mrauk-U and Minbya;
- Supply of **vegetables** will likely decline further until local upland cultivation comes online in monsoon.

Kyauktaw Township

Town Market

Kyauktaw Town market grew more active April and trade with Paleta grew, yet closures continued. Market hours were relatively stable in April, but the market closed occasionally due to nearby drone activity. Customer and retailer activity nonetheless increases and the town market grew closer to its normal size. Supply of goods was mediocre but mostly stable, except for fuel availability which worsened in April. Retailers supplied goods from neighboring townships, including Paletwa. Retailers remained most concerned with safety/security; many other challenges remained but grew less severe in April.



Market Functionality - Kyauktaw Town market was open in April and hours were stable, but the market area was unsafe and there were occasional closures.

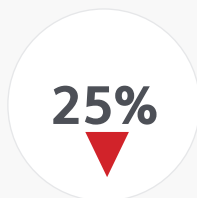
- **Opening Hours:** 6am-5pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** Occasional short-term market closures due to nearby drone activity.

Market Activity - Activity grew in Kyauktaw Town market in April, nearly reaching October 2023 levels, as customers arrived from nearby towns and villages.

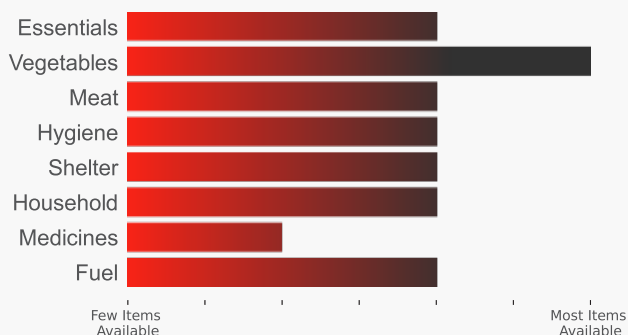
Customers



Retailers



Availability of Goods - Supply of hygiene NFIs improved slightly in April, but fuel supply worsened. Local supply was otherwise mostly unchanged, although various NFIs like plastic tarps grew more scarce.



Scarce Items

- *Santiary pads*
- *Baby products*
- *Plastic tarps*
- *Jerry cans*
- *Vitamins*
- *Medicines*

Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Villages, Paletwa, Minbya.
- **Lead Time:** 5-14 days.
- **Shipping Costs:** Stable.
- **Example Rates:**



50kg Rice Bag

-



Small Car

80,000 MMK (from village)



Small Truck

200,000 MMK (from village)



Small Boat

-

Retailer Challenges - Kyauktaw retailers said safety remained a major challenge, particularly as drones halted market operations. Other challenges such as poor cash access, transportation, and supply remained troublesome for retailers, but these challenges grew less severe in April.



Maungdaw Township

Town Market

Maungdaw market hours shortened in April, and activity slowed as the security situation grew tense. Market hours were shortened April as the local security environment grew worse, and fewer customers visited the town market. NFI supply improved slightly, but vegetable supply worsened and many medicines remained unavailable. Only fuel access improved in March. Retailers continued sourcing goods from nearby Rathedaung Township, but shipping costs were on the rise again in April. Maungdaw retailers continued to face many challenges, but they were concerned most of all with safety/security.

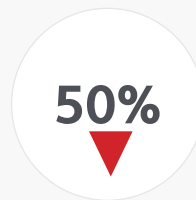


Market Functionality - Market hours were shortened in April as the security situation remained tense, although there were no reports of market closures.

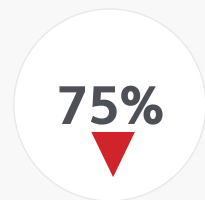
- **Opening Hours:** 7:30am-3pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Customer activity dipped again in April as poor security and shorter market hours discouraged trade. Some village customers still visited.

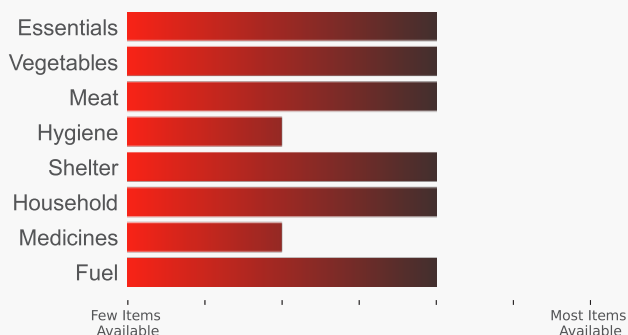
Customers



Retailers



Availability of Goods - Supply of shelter and household NFIs improved slightly in April, although vegetable supply worsened. Supply of goods remained relatively poor in Maungdaw Town market.



Scarce Items

- *Vitamins*
- *Medicines*

Transport & Logistics

- **Inter-Township:** Formal shipping not allowed.
- **Suppliers:** Rathedaung, Bangladesh.
- **Lead Time:** 1 week.
- **Shipping Costs:** Rising.
- **Example Rates:**



50kg Rice Bag
-



Small Car
400,000 MMK (Rathedaung)



Small Truck
-



Small Boat
-

Retailer Challenges - Maungdaw retailers continued to face many severe challenges, particularly poor safety/security. There was little sign of relief in April as poor access to cash, weak demand, transportation limits and limited supply all remained notable challenges.



Minbya Township

Town Market

Retail activity returned to Minbya Town in April, but it remained half its normal level and supply was still poor.

Ward markets operated during mornings hours in Minbya Town as commercial activity returned, but observers still described the area as unsafe. Minbya Town market activity grew in April but remained just half previous levels. Supply was poor as the main market remained closed in late-April, and there were still few sellers of many foods and NFIs. Shipping costs were stable, and goods arrived from nearby townships. Limited supply and weak demand were key challenges as the town remained quieter than usual.

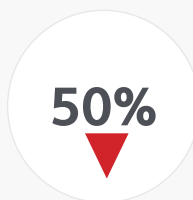


Market Functionality - Ward markets resumed activity in mornings, but the main market remained closed. Observers still regarded the area as unsafe, although there was no recent damage or closures.

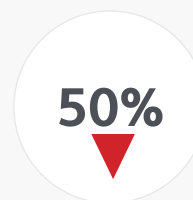
- **Opening Hours:** 5am-10:30am, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Minbya ward markets grew in April but remained just half their original size. Village customers returned, but very few from further away.

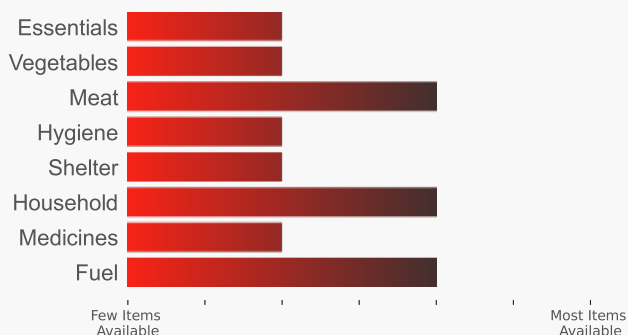
Customers



Retailers



Availability of Goods - Supply remained poor in Minbya Town ward markets. Many foods and NFIs were unavailable, although fuel could be purchased. Retailers expected supply to improve as activity resumed.



Scarce Items

- *Fruits*
- *Baby products*
- *Medicines*

Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Kyauktaw, Mrauk-U, Toungup.
- **Lead Time:** 3-7 days.
- **Shipping Costs:** Stable.
- **Example Rates:**



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



Small Car
150,000 MMK
(Kyauktaw town)



Small Truck
250,000 MMK
(Kyauktaw town)



Small Boat
-

Retailer Challenges - Retailers in Minbya's ward markets reported facing challenges, although none too severe. Limited supply and weak demand were most challenging in the ward markets which only recently reanimated, but transportation, and cash access were also challenging.



Mrauk-U Township

Village Market

Security improved in the Mrauk-U village market, and supply was stable. Market hours were regular in April, and observers said market security improved. Vegetable supply worsened but availability of goods remained generally better in this market than elsewhere. Retailers sourced goods from Minbya and Kyauktaw, and shipping costs continued to decline even as they stabilized in nearby townships. Transportation and safety/security remained the most notable challenges for retailers, but in general retailers in Mrauk-U reported fewer business-related challenges than retailers in other markets monitored.

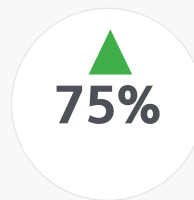


Market Functionality - Market hours were stable and there were no recent closures in April. Observers said local security appeared to improve.

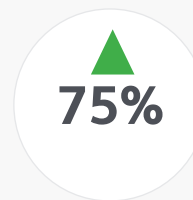
- **Opening Hours:** 6am-5pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Market activity was unchanged, and village activity remained elevated as many area customers still avoided Minbya Town.

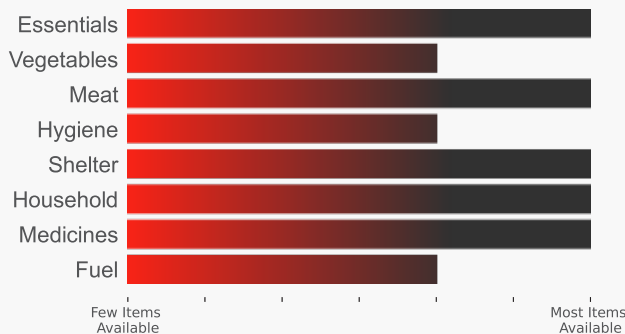
Customers



Retailers



Availability of Goods - Supply of fuel and vegetables worsened in April, but supply of shelter and household NFIs improved. Availability of goods remained generally better in this market than in others monitored.



Scarce Items

- Fruit
- Biscuits
- Medicines

Transport & Logistics

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



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



Small Car
150,000 MMK
(Kyauktaw town)



Small Truck
-
-



Small Boat
-
-

Retailer Challenges - Mrauk-U village retailers still reported fewer challenges as security improved and supply remained decent. Concerns about safety/security and transportation costs remained, although they were less notable than in other markets monitored.



Pauktaw Township

Village Market

The Pauktaw village market was stable, but lead-times to supply goods from southern Rakhine State was long.

Market hours were stable, and observers still described the market as safe. Market activity remained stable, and the market served area villages and townships. Some NFIs grew more scarce in April, but in general supply was stable and relatively good compared to other markets. Shipping prices were stable, but lead times for new supply from Toungoup were very long. Retailers' greatest challenges were supply and transportation cost as trade links with southern Rakhine State remained tenuous.

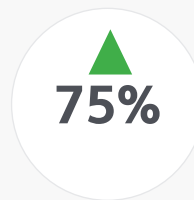


Market Functionality - Market hours were stable, and there was no recent damage or closures. Retailers described the village market as safe.

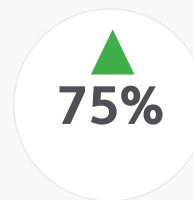
- **Opening Hours:** 6am-5:30pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

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

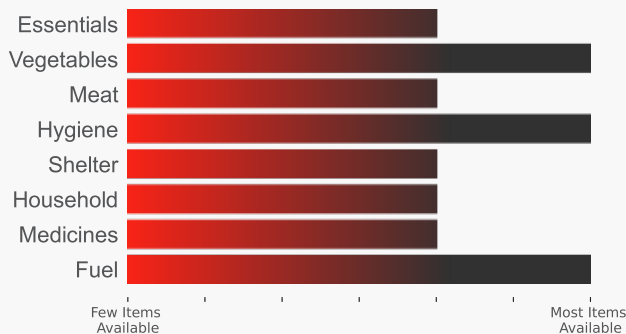
Customers



Retailers



Availability of Goods - Supply was stable in Pauktaw in April, where many foods and NFIs were available. Vegetable supply remained good, although there were reports of growing scarcity of certain NFIs.



Scarce Items

- Sugar
- Biscuits
- Dried chili
- Garlic
- Charcoal
- Clothing
- Medicines

Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Minbya, Sittwe, Toungup, Kyauktaw.
- **Lead Time:** 2 weeks.
- **Shipping Costs:** Stable.
- **Example Rates:**



50kg Rice Bag
30,000 MMK
(Minbya town)



Small Car
200,000 MMK
(Minbya town)



Small Truck
250,000 MMK
(Minbya town)



Small Boat
-

Retailer Challenges - Limited supply remained the largest challenge for Pauktaw village retailers in April. Safety/security was notably absent among the challenges reported by retailers, while limited transportation and weak demand were cited by some.



Ponnagyun Township

Village Market

Market activity was stable in the Ponnagyun village, but supply lead-times were long and NFIs were scarce.

Market hours were stable in April, and the village market increasingly looked like its quieter former self. Customer and retailer activity in this small market was stable in April. Supply of essential foods and critical shelter NFIs improved somewhat, but many other NFIs were unavailable. Retailers faced very long lead times supplying goods from central Myanmar via Toungup. Retailers reported relatively few business-related challenges, and they worried most about weak demand as few customers remained.

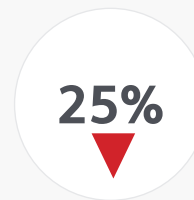


Market Functionality - Market hours were stable, and there was no recent damage or closures. Retailers continued to describe the village market as safe.

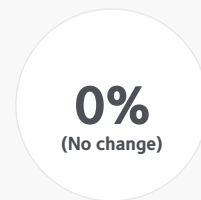
- **Opening Hours:** 6am-5pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Market activity was stable in April, and the village continued to look more like its quieter former self. Most customers were still local.

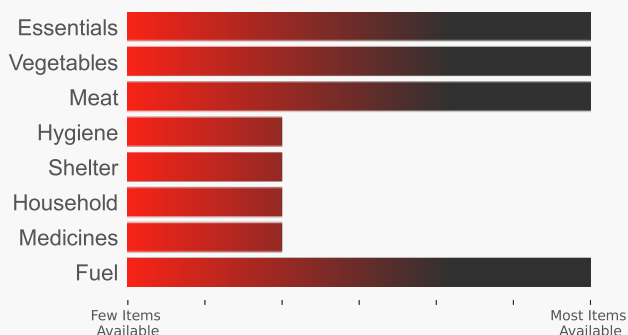
Customers



Retailers



Availability of Goods - Supply of essential foods and shelter NFIs improved slightly in April as retailers restocked items following lower inventories in March. Availability of food items remained far better than for NFIs.



Scarce Items

- *Sugar*
- *Soap*
- *Vitamins*
- *Medicines*

Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Kyauktaw, Mrauk-U, Toungup.
- **Lead Time:** 10-15 days.
- **Shipping Costs:** Stable.
- **Example Rates:**



50kg Rice Bag
12,000 MMK
(Toungup town)



Small Car
250,000 MMK
(Kyauktaw town)



Small Truck
500,000 MMK
(Kyauktaw town)



Small Boat
-

Retailer Challenges - Ponnagyun village retailers continued to cite weak demand as their primary challenge as the village market reverted to its former, quieter state. Fewer customers and weaker demand reduced concerns about limited supply despite poor availability of many NFIs in the village.



Sittwe Township

Town Market

Commercial activity shifted to ward markets in Sittwe as the main market grew quieter and less secure. Sittwe customers shifted to morning ward markets as the main market grew unsafe and many retailers there closed their shops. Customer and retailer activity in the ward markets remained muted as well, and availability of NFIs grew worse as the typical retailers in the main market were unavailable. Shipping costs continued rising in Sittwe where retailers struggled to source goods from other townships. Safety/security risk were the greatest challenge reported by retailers in Sittwe ward markets in April.



Market Functionality - As the main market grew quiet, morning ward markets became increasingly important in Sittwe Town. Observers described ward markets as safe and free of damage or closures.

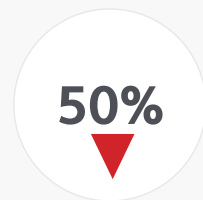
- **Opening Hours:** 5:30am-10:30am, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** Periodic closures in previous week.

Market Activity - Market activity remained muted in Sittwe ward markets in April and well below normal levels, but village customers continued to visit.

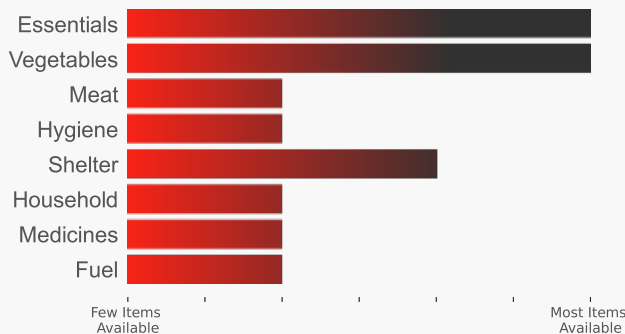
Customers



Retailers



Availability of Goods - Availability of NFIs declined sharply in Sittwe Town in April as the main commercial areas which usually supply NFIs grew quiet. Essential foods and vegetables however remained fairly well-stocked.



Scarce Items

- Fresh fish
- Chicken
- Detergent
- 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
15,000 MMK
(from village)



Small Car

-



Small Truck

-



Small Boat

-

Retailer Challenges - Sittwe ward market retailers reported fewer challenges in April than main market retailers had in March, possibly because ward retailers sell fewer and better-supplied goods like local vegetables. Safety/security remained the greatest challenge for retailers.



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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