

Market Snapshot

Rathedaung, Minbya, Pauktaw, Kyauktaw

This rapid Market Snapshot presents data to support Cyclone Mocha disaster response efforts. Data were collected through observation and KIIs during May 23-24, 2023. Reports available at www.themimu.info/market-analysis-unit.

KEY FINDINGS

- **Market damage remained a major concern for vendors** ten days after Cyclone Mocha made landfall;
- **Market operations in Rathedaung and Pauktaw were particularly limited;**
- **Plastic tarp prices were up 200-300% across markets,** and many shelter materials were still in short supply;
- **Food prices were far more stable than NFI prices,** although rice prices were increasing somewhat;
- **Metal roofing, nails and tarps were understocked,** with demand outpacing retailer's ability to resupply;
- **Retailers lacked access to suppliers,** and poor transportation/communication networks inhibited restocking;
- **Both in-kind and cash assistance remain important** aid modalities as the speed and degree of market and supply chain recovery continues to vary by location.

Rathedaung Town Market

Market Conditions - Rathedaung Town's main market remained closed due to severe damage, and most retailers operated from the jetty. As of May 24, Rathedaung Town's main market remained closed due to damage that downed market structures, destroyed the entire roof, and damaged inventories; as a result, regular retail activity had temporarily moved to the Rathedaung jetty. The jetty market was open daily with roughly-normal operating hours (6am - 4pm), however retailers described it as a potentially-unsafe retail environment due to high temperatures and poor shade for workers.

The temporary market at Rathedaung jetty operated at less than half the size of the town's normal market. As of May 24, the temporary market at Rathedaung jetty operated at less than half the size of the town's normal main market. The jetty market consisted of a few wholesalers and service providers, a handful of small vegetable sellers, a number of meat/fish sellers, and up to 20 retailers of general foods and NFIs. Although the jetty market was not very busy, customers were arriving from both Rathedaung Town and villages within the township. Retailers of rice and hygiene products said their daily customer-counts were cut in half after Cyclone Mocha, however shelter retailers reported having more than twice as many daily customers after the storm.

Product Availability and Price - Rathedaung retailers said demand was high for many products, and only shelter materials were in very poor supply. Retailers reported high demand for hygiene products like toothpaste and soap, but they also said current supply of these

**Kyauktaw data was collected May 20, 2023.*

items was adequate to meet demand. By contrast, retailers reported both high demand and low supply of shelter products like metal roofing, roofing nails, and plastic tarps. Demand for high- and low-quality rice was high, but retailers said supply of rice was not particularly poor.

Essential food prices appeared relatively stable in Rathedaung Town. Prices were fairly stable for pulses and better rice, lingering within 5% of pre-cyclone levels. Although prices for cooking oil appeared to fall 38%, this is likely due to the availability of only poorer-quality cooking oil after the cyclone. The same may be true of cheaper rice and cooking oil, which appeared to be down 18% and 13%, respectively.

Plastic tarp prices were up nearly fivefold in Rathedaung Township after Cyclone Mocha, while other NFI prices were up 20% or more. Toothpaste prices were up 20% after Cyclone Mocha, and prices for soap were up 50%; prices for sanitary pads were down 23%. Blankets and mosquito nets were up 29% and 45%, respectively, while prices for plastic tarps were up more than 350% after the storm.

Supply Chains - Rathedaung retailers expected longer lead times for restocking, and few expected to be able to satisfy more than a 20% increase in demand. Rice retailers said they could satisfy most of their customer demand post-cyclone, but shelter/hygiene retailers said they could not. Rice and hygiene vendors said there were fewer suppliers of their goods after the cyclone and expected to stockout if demand increased by

20%. By contrast, shelter retailers said there were actually more suppliers of materials like metal roofing after the cyclone and believed they could resupply if demand increased by 20%. Retailers said they would raise prices if demand increased by 50% (although none believed they

could actually resupply at that level). Most retailers expected normal resupply lead times of 2 days to increase to at least 5–6 days, due to poor transportation and poor communication channels for contacting suppliers.

Minbya Town Market

Market Conditions - Minbya's main market operated during normal hours, but there was extensive market damage and inventory losses. Minbya Town's main market suffered extensive roof damage in Cyclone Mocha, and all retailers interviewed reported inventory losses due to rain damage. As of May 24, the main market was open daily and operating during normal market hours (6am - 6pm). Observation suggested that access routes to the market were safe to travel.

Ten days after Cyclone Mocha made landfall, Minbya's main market operated at roughly half of its original size. As of May 24, half of retailers and wholesalers had returned to Minbya market. Roughly speaking, half of returning vendors were food retailers (general foods, small vegetable sellers, meat/fish sellers), while the remainder were divided between larger wholesalers, NFI retailers, and service providers. Town-based customers had returned to Minbya market, however very few village-based customers were shopping at the market. Retailers of food and general NFIs (e.g., clothing, umbrellas, soap) said daily customer-counts remained 30% below pre-cyclone levels; however, one retailer of shelter materials said his daily customer-counts had increased fourfold since Cyclone Mocha, reflecting high demand for shelter materials.

Product Availability and Price - Minbya vendors reported inadequate supply of shelter materials, although this was less true of foods and other NFIs. Food vendors reported high demand for cooking oil, dried noodles, and eggs, although only dried noodles

were in very poor supply. Retailers of shelter materials reported high demand for metal roofing, roofing nails, and plastic tarps, all of which were poorly supplied. Retailers of general NFIs said demand was high for umbrellas, clothing, and soap, but there was currently adequate supply of most of these products.

Plastic tarp prices in Minbya were triple pre-cyclone levels, while prices for rice and pulses were up 6–12%. Plastic tarp prices tripled from 8,000 to 24,000 MMK/72 sq ft. Prices for blankets were up 29%, and mosquito nets were unavailable. Prices for toothpaste and sanitary pads were also up 10% since the cyclone, while soap prices were up 50%. Essential food prices in Minbya had risen moderately since Cyclone Mocha, with rice prices up 6–7% and prices for pulses up 12%. Although prices for cooking oil appeared to fall 5%, this is likely due to the availability of only poorer-quality oils after the cyclone.

Supply Chains - Minbya vendors expected difficulty resupplying NFIs, although this was less true of food items. Retailers reported having a hard time meeting customer demand after Cyclone Mocha, particularly NFI retailers. Food retailers said they could mostly satisfy customer demand, but retailers of shelter materials and other NFIs said they could only partly do so. Both food and NFI vendors appeared keen to raise prices if demand increased just 20%, but restocking such supply would not be easy. Retailers and wholesalers expected longer lead times for general foods (increasing from 1 day to 3 days), shelter materials (from 3 days to 1 week), and other household NFIs (from 1 week to 4 weeks).

BOX 1. Main Challenges for Retailers

Market infrastructure damage and poor/expensive transportation dominated retailer concerns following Cyclone Mocha.

Rathedaung - Retailers and wholesalers worried most about market infrastructure damage and considered the temporary jetty market largely inadequate. Food and hygiene retailers in particular worried about poor demand due to lack of returning customers, while shelter retailers worried about poor or expensive transportation.

Minbya - Retailers and wholesalers in Minbya had broad concerns, including market infrastructure damage, poor/expensive transportation, and the rising cost of restocking new of supply; poor access to cash/credit was a lesser but important concern for retailers.

Pauktaw - Food retailers in Pauktaw said poor access to new supply was their biggest challenge.

Kyauktaw - Retailers and wholesalers in Kyauktaw worried most about market infrastructure damage and poor/expensive transportation; poor supply/demand and access to cash/credit were not major concerns for them.

Pauktaw Town Market

Market Conditions - Pauktaw's main market was open only infrequently, and building/inventory damage was extensive. Pauktaw's main market suffered extensive roof and infrastructure damage during Cyclone Mocha, and retailers reported damage to inventory stored in the market. As of May 24, the market had only opened roughly once per week, although when open the operating hours were similar to those prior to the storm (7am - 5pm). Reports suggested that road damage had rendered some routes to the market unsafe to travel.

Ten days after Cyclone Mocha made landfall, Pauktaw market operated at roughly one-third of its normal size. As of May 24, just one-third of retailers and wholesalers had returned to Pauktaw's main market. Half of returning vendors sold food items (vegetables, general foods, meat/fish), while the other half included a few wholesalers, service providers, and NFI retailers. Town-based customers were returning, but there were very few customers from villages within the township. General food retailers reported half as many daily customers after Cyclone Mocha as before.

Product Availability and Price - Pauktaw retailers said demand was high for various foods and NFIs, and supply of medicine and metal roofing was poor. Retailers reported high demand for shelter-related NFIs, foods like rice and cooking oil, and medicines. According to retailers, local supply was particularly low for food

Kyauktaw Town Market

Market Conditions - Kyauktaw's main market suffered damage in Cyclone Mocha and operations were limited. Kyauktaw's main market suffered wall and roof damage in Cyclone Mocha—particularly on its western face—and both shelter and food retailers reported inventory losses from the storm. The main market opened just one day in the first week after the storm, although operating hours on that day were normal (6am - 5pm). As of May 20, retailers said some access roads to the market remained unsafe.

One week after Cyclone Mocha made landfall, very few local retailers had resumed operations. As of May 20, just 15% of retailers and wholesalers had returned to Kyauktaw's main market. The few returning vendors included service providers, NFI retailers, and food retailers (general foods, vegetables, meats). Because the market was largely closed, few town- or village-based customers had returned. General food and NFIs vendors who continued to operate from the market or from alternative locations (e.g., homes) reported higher daily customer counts after the storm because there were fewer other vendors able to provide goods.

items like rice, cooking, chili, salt, and meat/fish, while local supply was particularly low for NFIs like metal roofing and medicines.

Rice prices in Pauktaw appeared to rise after Cyclone Mocha. Prices for lower- and higher-quality rice were up 30-40% in Pauktaw—more so than in other townships—while prices for pulses were up 5%. Prices for cooking oil were down 33%, although this may be due to the availability of only poorer-quality cooking oil.

NFI prices were up in Pauktaw after Cyclone Mocha, and plastic tarp prices had quadrupled. NFI prices were higher after Cyclone Mocha, with mosquito nets up 14%, blankets up 27%, and plastic tarps up 317%. Prices for toothpaste and sanitary pads were fairly stable (i.e., within 8% of pre-cyclone levels), however soap prices were up 67%.

Supply Chains - Food retailers expected to struggle to meet demand in Pauktaw due to limited access to suppliers. Due to broken supply chains, food retailers struggled to meet customer demand after Cyclone Mocha (despite lower daily customer counts). Food retailers said the number of available suppliers had fallen since Cyclone Mocha, and they expected restocking lead times to increase from 2-3 days prior to the storm to 5 days afterward.

Product Availability and Price - Many foods and shelter materials faced low supply in Kyauktaw after Cyclone Mocha. Food vendors reported high demand for high- and low-quality rice, eggs, onion, and chili—all of which also faced poor supply. NFI retailers said demand was high and supply was low for products like metal roofing, roofing nails and plastic tarps.

Despite supply challenges, essential food prices in Kyauktaw appeared stable in the week after Cyclone Mocha. Prices for pulses and cheaper rice were relatively stable in the first week after Cyclone Mocha, with prices for pulses down 5% and cheaper rice prices remaining flat (prices for higher-quality rice like Paw San were up 35%). Prices for cooking oil appeared to fall 38%, but this is likely due to the availability of only poorer-quality cooking oil after the cyclone.

Plastic tarp prices quadrupled in Kyauktaw after Cyclone Mocha, and prices for hygiene products were up 15% or more. Mosquito net prices were up 23% in Kyauktaw, while blanket prices had doubled and prices for plastic tarps had quadrupled. Prices for toothpaste

and sanitary pads were up 15-20% in Kyauktaw, while soap prices were up 50%.

Retailers and wholesalers in Kyauktaw said NFIs had become more difficult to supply, although this was less true of food. Retailers and wholesalers of rice, shelter materials and general foods in Kyauktaw said they were mostly unable to meet customer demand after Cyclone Mocha. Retailers said the number of suppliers had

fallen by at least half after the cyclone, making it much more difficult to restock goods. Both food and NFI vendors appeared keen to restock if demand increased, but few were able to access supply or even satisfy current demand. Kyauktaw retailers said they could acquire new inventory in 1-3 days prior to Cyclone Mocha, but after the storm most were unable to get new inventory at all and none could predict current restocking lead times.

Implications for Response Efforts

- **In-kind assistance should remain a high priority, particularly for shelter materials.** As shelter materials remain expensive and hard to supply, in-kind support remains a critical aid modality.
- **Cash assistance remains appropriate where operational constraints prevent in-kind support.** As some markets and supply chains recover faster than others, cash remains appropriate, especially in cases where barriers prohibit in-kind assistance.
- **Partners should prioritize transportation of high-demand shelter/hygiene items into Rakhine State.** To address acute supply shortages, partners should collaborate with local suppliers to support restocking.
- **Humanitarian actors should consider grants/loans to local vendors.** The slow recovery of markets in Rakhine State suggests that assistance for market actors may be needed to expedite market recovery and boost availability of critical goods.
- **Cash-for-work programs may help markets and households recover.** As markets suffered major infrastructure damage, cash-for-work programs focussed on clearing debris and rebuilding key structures could provide income while helping market recovery.
- **Cash transfer values may need to be adjusted in response to rising prices.** If prices for critical goods like shelter materials remain persistently high, transfer values may need to be increased to remain relevant.
- **Continued monitoring is needed to adjust interventions accordingly.** Market operations remained badly disrupted ten days after Cyclone Mocha made landfall, suggesting recovery may be slow, difficult and evolving.

Prices for Selected Products (MMK)

Price for May 24, 2023 (MMK)*

Product	Category	Rathedaung	Minbya	Pauktaw	Kyauktaw
Better Rice (1 kg)	Essential Foods	2,300	1,900	2,200	2,700
Cheaper Rice (1 kg)	Essential Foods	1,400	1,500	1,700	1,800
Palm Oil (1 liter)	Essential Foods	4,800	4,500	5,000	5,000
Pulse (1 viss)	Essential Foods	5,000	6,500	5,800	5,700
Toothpaste (140 g)	Hygiene	1,800	2,000	1,500	1,500
Soap (60 g)	Hygiene	1,500	1,500	1,500	1,500
Sanitary Pad (10 pc)	Hygiene	1,000	1,100	1,100	1,200
Blanket	Shelter	9,000	11,000	7,000	8,500
Mosquito Net	Shelter	8,000	8,500	8,000	8,000
Plastic Tarpaulin	Shelter	35,000	24,000	20,000	24,000
Jerry Can	Shelter	4,000	6,000	-	5,000

Percent Change (since May 1, 2023)

Rathedaung	Minbya	Pauktaw	Kyauktaw
5%	6%	38%	35%
-18%	7%	31%	0%
-13%	-5%	-33%	-38%
0%	12%	5%	-5%
20%	11%	0%	15%
50%	50%	67%	50%
-23%	10%	-8%	20%
29%	29%	27%	112%
45%	-	14%	23%
367%	200%	317%	300%
-50%	-25%	-	-

*Kyauktaw prices for May 20, 2023.

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).

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