

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 October 21-23, 2024. Reports available at www.themimu.info/market-analysis-unit.

KEY FINDINGS

- **Most markets were open all day** but security was poor and/or worsening in most as well;
- **Retail traffic grew as rains let up**, but Maungdaw and Rathedaung markets remained very quiet;
- **Medicine supply rose amid reports of imports** from India, and hygiene NFI supply improved too;
- **Vegetable supply again fell slightly**, but food supply remained stable and better than for NFIs;
- **Shipping costs were stable or falling at times**, and lead-times improved in several markets;
- **Cash difficulties grew more prominent** as security, transportation, and supply challenges receded.



Regional Overview

Market Functionality - Many markets were open throughout the day, but security remained poor. Mrauk-U and Sittwe markets closed around noon, but all others were open throughout the day. There were no reports of market damage in October, but Mrauk-U and Kyauktaw markets closed periodically for security reasons. Half of markets monitored were viewed as "unsafe", and security worsened in Myebon and Pauktaw.

Market Activity - Market activity grew in late-October as monsoon rains receded and village roads improved. Most markets saw increased customer traffic in October, and half of all markets saw more retailers. The sole exception was Rathedaung, where activity dropped off sharply possibly due to tensions in nearby Maungdaw. Activity was slim in Maungdaw, where local conflict continued to hinder commerce. By contrast, Pauktaw saw the largest uptick in market activity in October.

Availability of Goods - Supply was stable and remained poorest in Rathedaung, Mrauk-U, and Sittwe. Food supply was largely stable and better than NFI supply. Supply improved a bit for NFIs like medicine, hygiene items, and fuel, and retailers reported more Indian medicines on the market. Supply in Sittwe and Rathedaung—already worse than elsewhere—worsened in October.

Transport & Logistics - Shipping costs were stable and even falling in some markets in October. Retailers in Ponnagyun and Rathedaung reported lower shipping costs, and those in four other markets reported stable shipping costs. Outliers like Sittwe and Maungdaw continued to see shipping costs rise. Rathedaung, Pauktaw, and Minbya also saw shipping lead-times fall from one week down to several days.

Retailer Challenges - Core challenges related to security, transportation, and supply receded in October. Retailer struggled less with transportation and supply, and those in Kyauktaw and Pauktaw cited the largest improvements. For the first time in months, retailers' greatest concern was accessing cash. Retailers in Mrauk-U and Minbya—where the town market recently reopened—reported the most severe challenges.

What to Watch

- Improved border trade may further improve supply of **NFIs** beyond medicines and hygiene NFIs;
- Supply of winter **vegetables** should begin rising soon, but changes in rice supply are far less certain;
- Lower **shipping** costs resulting from improved weather may stick if security conditions hold steady.

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).

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