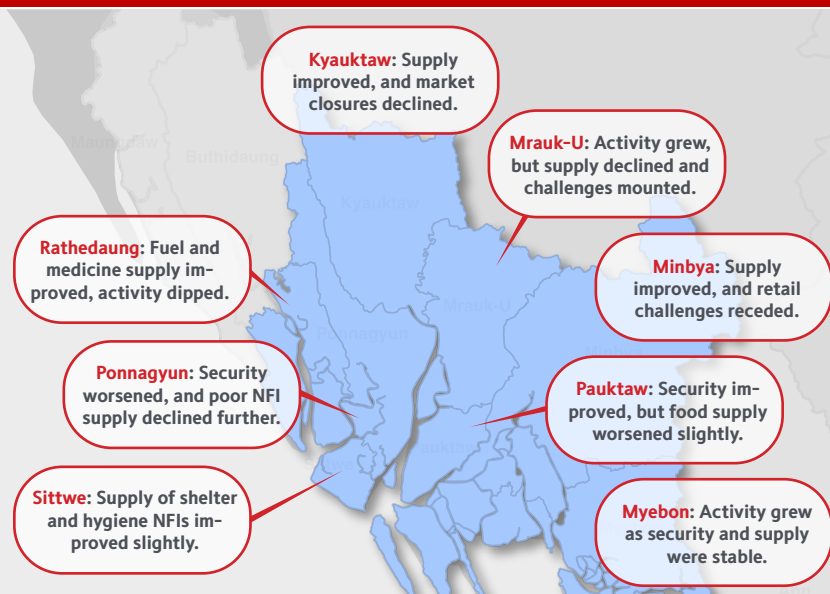


Rapid Market Assessment

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 August 20-23, 2024. Reports available at www.themimu.info/market-analysis-unit.

KEY FINDINGS

- **Markets were functional but security worsened** in places like Kyauktaw and Ponnagyun;
- **Customer traffic slowed further** as often happens in monsoon season, but most retailers remained;
- **NFI supply improved slightly in some markets**, particularly for medicines and shelter NFIs;
- **Supply of food items was relatively stable**, although it declined somewhat for vegetables;
- **Shipping costs increased regionally** and continued to drive rising food and NFI prices;
- **Retailers reported growing challenges** with poor security and limited supply foremost among them.



Regional Overview

Market Functionality - Market closures declined and hours were extended, but security remained poor. Most markets were open throughout the day in August, and market damage remained rare. That said, six-of-eight markets were described as "unsafe." Closures were less frequent than before in Rathedaung and Ponnagyun markets, but observers felt security had worsened slightly.

Market Activity - Customer activity declined in August, particularly in Sittwe and Rathedaung. Customer traffic declined in most markets except for Mrauk-U and Myebon. Customer activity declined in Sittwe and particularly Rathedaung where there was also a drop in retailer activity. In Mrauk-U customer and retailer activity grew even as supply dwindled and challenges grew.

Availability of Goods - Supply improved or worsened slightly depending on the market in question. Supply of most items declined sharply in Mrauk-U, where it was overall poorest in August. On the other hand, supply of medicines improved in Rathedaung, Pauktaw, and Kyauktaw; there were also marginal improvements in supply of hygiene and shelter NFIs. Rathedaung and Minbya in particular saw improved supply of NFIs and to some extent fuel. Supply worsened slightly for vegetables but improved slightly for essential foods.

Transport & Logistics - Shipping costs rose in more than half of all markets monitored in August. Sittwe, Ponnagyun, and Minbya reported stable shipping costs, but retailers in all other markets said costs rose. Supply lead-times were generally between two-and-five days, with shorter lead-times for foods than for NFIs. Shipping between townships remained relatively fluid with the critical exception of Sittwe Township.

Retailer Challenges - Retail challenges increased in August with growing concern about security and supply. Retailers in Mrauk-U and Myebon increasingly worried about a broad array of business conditions, while those elsewhere focussed specifically on security, transportation, and supply. Retailers in Minbya and Ponnagyun reported improved conditions with respect to cash access and transportation, respectively.

What to Watch

- Market **activity** in towns will likely remain muted as monsoon rains continue to disrupt local travel;
- Supply of **NFIs** may worsen due to poor transportation and rising shipping costs from recent flooding;
- Supply of **foods** may improve slightly as the harshest rains begin to pass and village transport improves.

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

