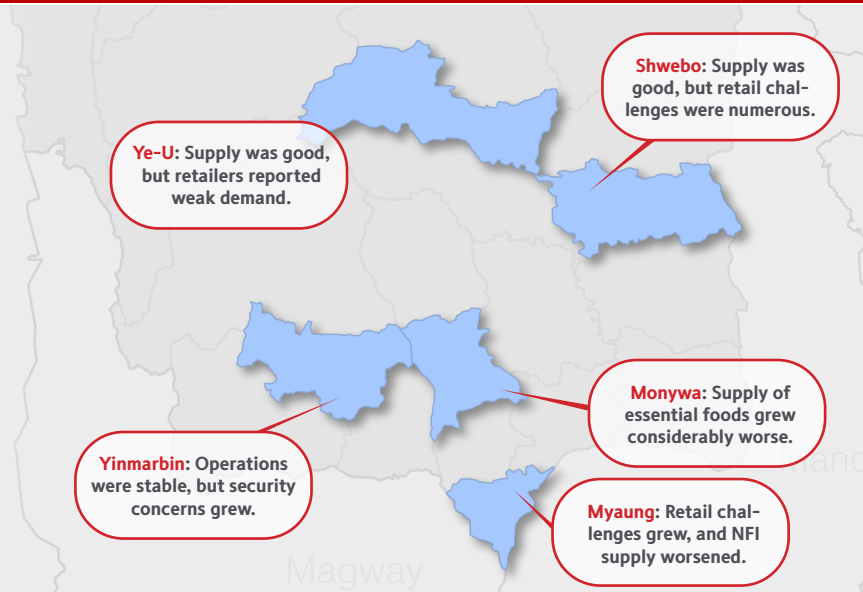


Rapid Market Assessment

This Rapid Market Assessment (RMA) is a supplement to the MAU Market Price Report in South Sagaing Region. It provides township-level data on market functionality, activity, supply, and logistics. Data were collected through observation and KIIs with retailers during June 21–30, 2024. Reports available at www.themimu.info/market-analysis-unit.

KEY FINDINGS

- **Market operations were stable in June**, and three-of-five markets were described as relatively safe;
- **Retail activity grew in Monywa and Yinmarbin**, but activity declined in Shwebo where security was poor;
- **Supply remained quite poor in some markets**, particularly Monywa and Yinmarbin;
- **Supply of NFIs remained poorer than for foods**, and supply of shelter and hygiene NFIs worsened in cases;
- **Shipping costs rose 7% in Ye-U**, although shipping costs and lead-times were fairly stable elsewhere;
- **Retail challenges grew considerably in Myaung**, while Shwebo retailers reported the most challenges.



Regional Overview

Market Functionality - Security was poor in/around the Myaung and Shwebo markets, but operations were stable. Market operations and security were stable in June, with consistent market hours and no reports of new damage or closures. Observers described three-of-five markets monitored as relatively safe.

Market Activity - Market activity was fairly stable, although it grew slightly in Monywa and Yinmarbin. Stable market conditions were accompanied by modest increases in customer and retailer activity in Monywa and Yinmarbin. Retail activity declined slightly in Shwebo where security was poor, but elsewhere it was stable.

Availability of Goods - Supply was mostly unchanged in June, and it remained very poor in Monywa and Yinmarbin. Supply of shelter NFIs worsened in Myaung and Shwebo in June, and supply of essential foods declined in Monywa. In general, supply of foods was better than for NFIs, and shelter and hygiene NFIs were most needed in the region.

Transport & Logistics - Shipping costs rose in two-of-five markets, but lead-times were stable. Shipping costs rose 7% in Ye-U and retailers said they rose in Monywa as well, but they were stable in three other

markets. Supply lead-times ranged from two days to ten days, depending on the market, and they were largely unchanged since May. All markets monitored allowed cross-township movement of goods, but transportation remained difficult. Monywa, Mandalay, and Yangon were common sources of supply for markets in the region.

Retailer Challenges - Retail challenges grew in Myaung in June, yet they continued to be most severe in Shwebo. Retailers grew increasingly concerned about safety/security in June, particularly in Myaung, Shwebo, and Yinmarbin. Concerns related to poor cash access also grew in June, and this was a significant challenge for retailers in four-of-five markets monitored. Ye-U retailers reported the fewest difficulties related to retail, and inventory/market damage was not a major concern in any of the markets monitored.

What to Watch

- Poor supply of **essential foods** in Monywa suggest growing difficulties may be impacting supply;
- Supply of **shelter** and **hygiene** NFIs may remain irregular as May's improvements were shortlived;
- Supply is likely to worsen in **Ye-U** where security declined in July.

Monywa Township

Town Market

Supply of essential foods grew worse in Monywa Town in June, and availability of NFIs remained poor.

The town market remained safe and operational in June, and customer activity grew slightly. That said, supply of NFIs remained poor and availability of essential foods grew worse with key items like rice and cooking oil becoming more scarce. Shipping costs continued to climb in June and lead-times were quite long. Poor transportation continued to be retailers' greatest challenge, and it was partly to blame for increased difficulty obtaining new supply in June.

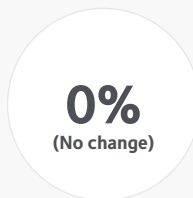


Market Functionality - Market hours were stable, and there was no recent damage or closures. Retailers described the market area as safe.

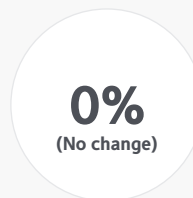
- **Opening Hours:** 5am-6pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Market activity grew slightly in Monywa Town in June, returning to more normal levels similar to late-2023.

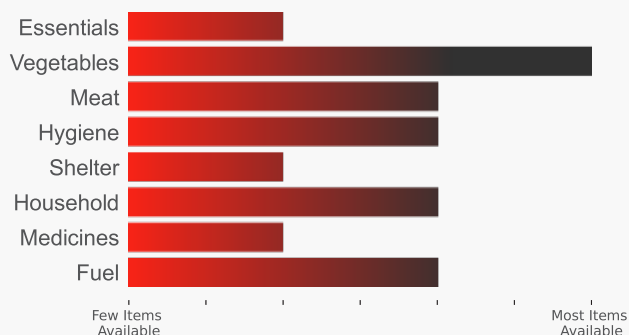
Customers



Retailers



Availability of Goods - Supply of essentials like rice and cooking oil worsened in June, while NFI supply remained poor. Many items were unavailable, but supply of medicines and shelter NFIs remained poorest.



Scarce Items

- Rice
- Cooking oil
- Medicines

Transport & Logistics

- **Inter-Township:** Formal shipping was allowed.
- **Suppliers:** Ye-U, Monywa villages, Yangon.
- **Lead Time:** 10 days.
- **Shipping Costs:** Rising.
- **Example Rates:**



50kg Rice Bag
3,000 MMK
(from Ye-U)



Small Car
75,000 MMK
(from Ye-U)



Small Truck
150,000 MMK
(from Ye-U)



Small Boat
-

Retailer Challenges - Transportation remained the main challenge for Monywa retailers, but challenges related to supply and demand also worsened in June. Cash access remained a problem for retailers as weak demand continued to mute sales and reduce revenue needed to buy new inventory.



Myaung Township

Village Market

Supply of hygiene and shelter NFIs worsened in June, and safety remained a major concern despite stable operations. Security conditions in/around the Myaung village market remained poor in June, but market operations were stable and activity remained somewhat higher than normal. The market continued to serve mostly nearby customers. Supply of fuel improved in June, but supply of hygiene and shelter NFIs worsened. Shipping costs were stable, but supply lead-times remained long. Difficulties related to safety/security grew worse and remained retailers' greatest challenge.

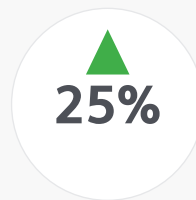


Market Functionality - Market hours were stable and there was no recent damage or closures, but observers still described the market area as unsafe.

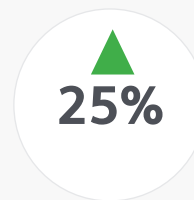
- **Opening Hours:** 5am-5pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Myaung village market activity remained elevated in June, but poor security continued to deter customers from nearby townships.

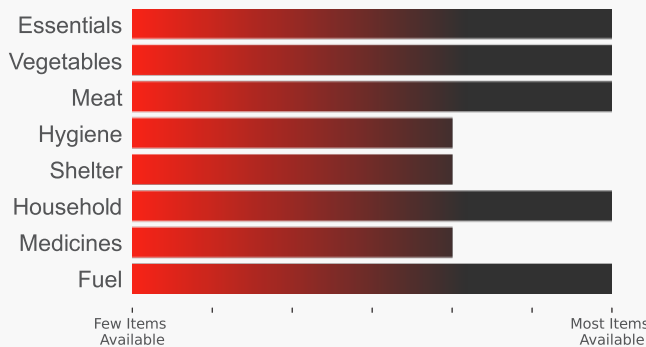
Customers



Retailers



Availability of Goods - Fuel supply improved in Myaung in June, but supply of hygiene and shelter NFIs worsened. Most food items remained available at market, but some NFIs remained difficult to find.



Scarce Items

- *School materials*
- *Agricultural inputs*

Transport & Logistics -

- **Inter-Township:** Formal shipping was allowed.
- **Suppliers:** Mandalay, Monywa, Chaung-U.
- **Lead Time:** 1 week.
- **Shipping Costs:** Stable.
- **Example Rates:**



50kg Rice Bag
2,500 MMK
(from Monywa)



Small Car
180,000 MMK
(from Mandalay)



Small Truck
180,000 MMK
(from Mandalay)



Small Boat
-

Retailer Challenges - Safety-related challenges—which were already the greatest concern for Myaung retailers—grew worse in June, and other challenges arose as well. Poor transportation and poor access to cash were increasingly worrisome for retailers.



Shwebo Township

Town Market

Supply of shelter NFIs worsened in Shwebo Town, but supply and overall market operations were otherwise stable. Market operations were stable in Shwebo Town, but observers described the market area as unsafe. Market activity dipped in June after rising slightly in May, and activity remained below late-2023 levels. Supply of shelter NFIs worsened slightly in June, although supply of food and NFIs was otherwise stable; fuel remained most scarce. Shipping costs and lead-times were stable in June. Safety/security—as well as the impact of checkpoints on transportation—remained major challenges for retailers.

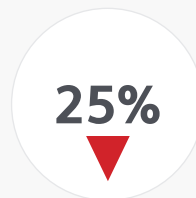


Market Functionality - Market hours were stable and there was no recent damage or closures, but observers still described the market area as unsafe.

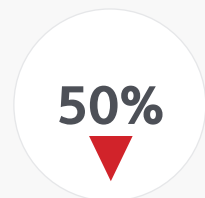
- **Opening Hours:** 5:30am-4:30pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Market activity fell slightly in June and was below late-2023 levels. Customers continued arriving from nearby townships.

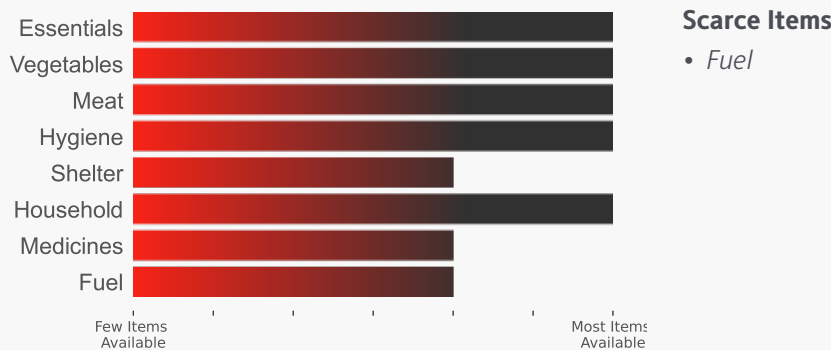
Customers



Retailers



Availability of Goods - Supply of food and NFIs was stable in Shwebo Town in June, although supply of shelter NFIs worsened slightly. In general, many foods and NFIs were available at market.



Transport & Logistics

- **Inter-Township:** Formal shipping was allowed.
- **Suppliers:** Mandalay, Yangon.
- **Lead Time:** 2-3 days.
- **Shipping Costs:** Stable.
- **Example Rates:**



50kg Rice Bag
2,000 MMK
(from Monywa)



Small Car
150,000 MMK
(from Mandalay)



Small Truck
250,000 MMK
(from Mandalay)



Small Boat
-

Retailer Challenges - Safety/security remained the greatest challenge for Shwebo Town retailers in June, although some said their access to cash grew significantly worse as well. Transportation difficulties, poor supply, and weak demand all remained difficult as well.



Ye-U Township

Village Market

Supply of food and NFIs remained fairly good in the Ye-U village market, but demand and sales were poor.

The Ye-U village commercial area remained safe in June, and business operations were stable. Customer and retailer activity was again stable and remained higher than late-2023. Supply of both food and NFIs remained very good in the village, possibly in part because demand was fairly weak. Shipping lead-times were relatively short, but costs were rising in June. Weak customer demand continued to trouble retailers, and although inventory was quite good they said transportation and resupply remained difficult.

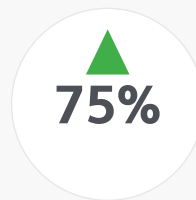


Market Functionality - The daily wet market and commercial area kept regular hours in June, and observers said these areas remained safe for customers.

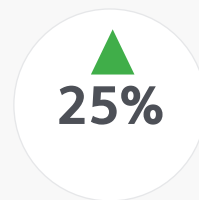
- **Opening Hours:** 6am-5:30pm, periodic.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Customer activity remained elevated in June, and the village market continued serving area villages and townships.

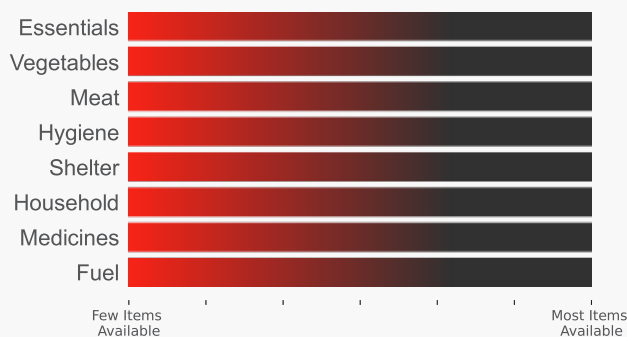
Customers



Retailers



Availability of Goods - A wide range of foods and NFIs were available at the Ye-U village market in June, although very weak demand may have helped account for the supply of goods in the market.



Scarce Items

- n/a

Transport & Logistics -

- **Inter-Township:** Formal shipping was allowed.
- **Suppliers:** Mandalay, Monywa.
- **Lead Time:** 2 days.
- **Shipping Costs:** Rising.
- **Example Rates:**



50kg Rice Bag
7,500 MMK
(from Monywa)



Small Car
150,000 MMK
(from Monywa)



Small Truck
300,000 MMK
(from Monywa)



Small Boat
-

Retailer Challenges - Ye-U retailers continued to report that weak demand was their greatest challenge, although transportation challenges also grew worse in June. Retailers also said acquiring new supply presented challenges, despite relatively good supply of goods at market.

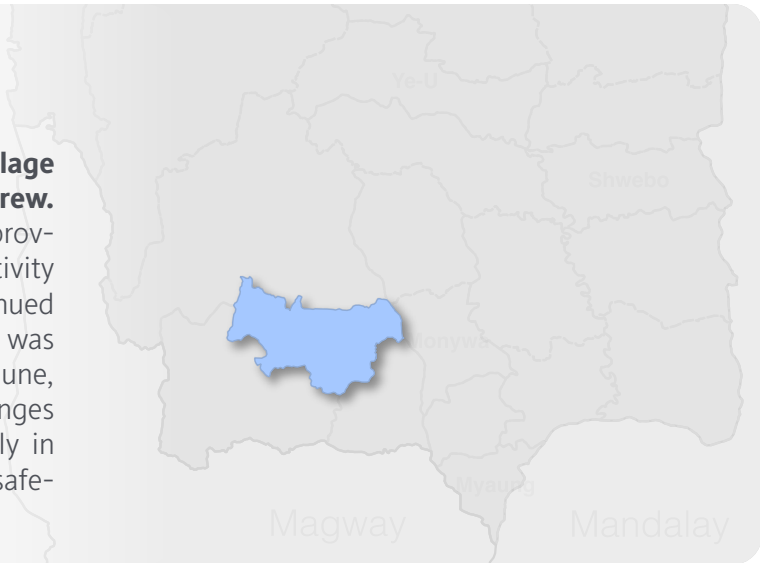


Yinmarbin Township

Village Market

Market operations were stable in the Yinmarbin village and activity grew slightly, but security concerns grew.

The market remained relatively safe after security improving in May, and operations were stable. Market activity also grew slightly more in June, and customers continued to visit from nearby areas. Supply of food and NFIs was stable but mediocre. Shipping costs were stable in June, but lead-times remained somewhat lengthy. Challenges related to transportation and supply receded slightly in June, but retailers reported growing concerns about safety/security and access to cash.

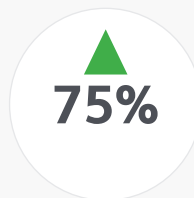


Market Functionality - Market hours were stable in June, and security conditions remained relatively safe. There was no recent damage or closures.

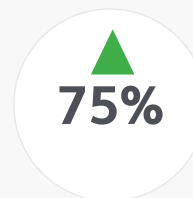
- **Opening Hours:** 4am-6pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Market activity grew slightly in June and remained higher than last year. Customers arrived from nearby townships and villages.

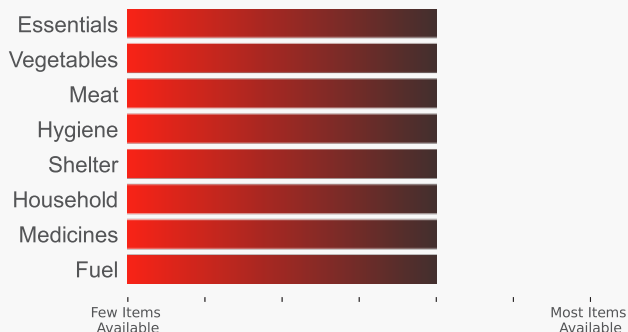
Customers



Retailers



Availability of Goods - Supply of food and NFIs was stable but mediocre in Yinmarbin Town in June. Some but not all foods and NFIs were available in the market.



Scarce Items

- n/a

Transport & Logistics -

- **Inter-Township:** Formal shipping was allowed.
- **Suppliers:** Monywa.
- **Lead Time:** 1 week.
- **Shipping Costs:** Stable.
- **Example Rates:**



50kg Rice Bag
10,000MMK
(from Monywa)



Small Car
100,000 MMK
(from Monywa)



Small Truck
200,000 MMK
(from Monywa)



Small Boat
-

Retailer Challenges - Yinmarbin retailers' challenges shifted in June, with greater emphasis on safety/security challenges. Transportation and supply were less of a concern in June than in May, while difficulties related to cash access grew more prominent.



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 month 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 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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