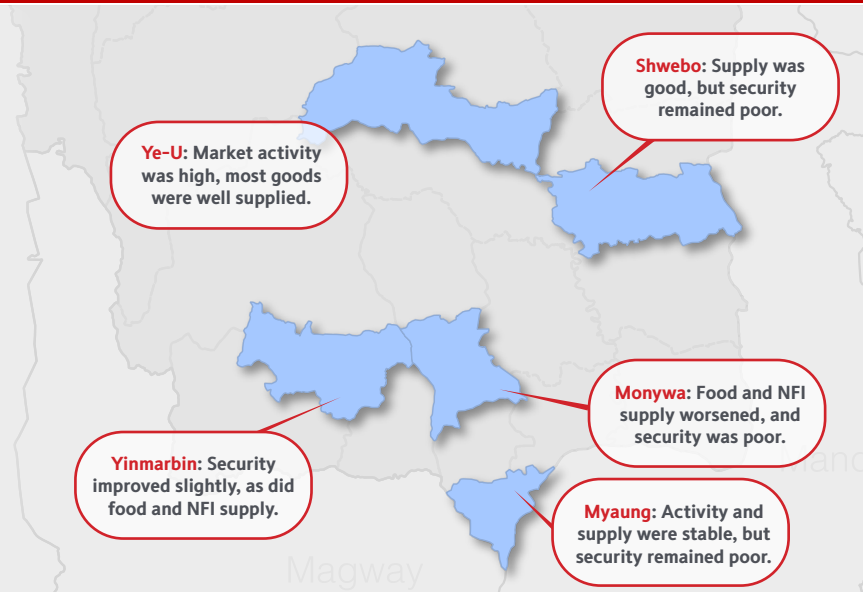


Rapid Market Assessment

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 May 21–30, 2024. Reports available at www.themimu.info/market-analysis-unit.

KEY FINDINGS

- **Market security was largely unchanged in May**, and it remained poor in Shwebo and Monywa Towns;
- **Market activity was generally stable**, although retailers suggested customers were spending less;
- **Supply of many NFIs improved**, including fuel and medicine, although supply of hygiene NFIs worsened;
- **Supply in Yinmarbin was most improved in May**, but supply was still worse here than elsewhere;
- **Shipping rates rose 10–20% in most areas**, and all five markets monitored reported higher rates;
- **Retail challenges increased most in Monywa**, and concerns of weakening demand grew regionwide.



Regional Overview

Market Functionality - Security remained poor in/around some markets, but operations were stable. Security improved slightly at the Yinmarbin village market, but security conditions were otherwise unchanged in May. All markets monitored remained open, and operating hours were generally stable.

Market Activity - Relatively good security at village markets contributed to stable market activity. Market activity shifted slightly at markets in Shwebo and Monywa Towns, but overall there was little change in customer and retailer volumes in May. The Myaung market—where security remained poor—continued to serve only nearby villages within the township.

Availability of Goods - NFI supply improved in May, particularly in Yinmarbin where supply was worst. Markets in Yinmarbin, Ye-U, and Shwebo saw supply improvements, primarily related to NFIs. Supply of NFIs—including fuel and medicines—generally improved in May, although supply of hygiene items worsened slightly. Supply of food items was generally stable.

Transport & Logistics - Retailers in all five markets monitored reported rising shipping costs in May. Lead times remained stable in May, but retailers in four-of-

five markets monitored said shipping costs rose 10% or more. Formal shipping in/around Shwebo resumed in May, and all markets monitored allowed cross-township movement of goods. Sources of supply were generally unchanged in May, with suppliers in Monywa, Mandalay, and Yangon remaining the primary sources of goods.

Retailer Challenges - Monywa retailers reported more challenges in May, and concerns about weak demand grew. Retail challenges grew considerably in Monywa in May, but retailers elsewhere reported overall fewer retail difficulties than last month. Challenges related to transportation and cash lessened somewhat in May, although a growing number of retailers said weak demand was a problem for them. Shwebo Town retailers continued to report the most severe business-related challenges, particularly related to security and transportation.

What to Watch

- Growing retail challenges in **Monywa**—a regional trade hub—may further hinder regional **supply**;
- Improved supply of **NFIs** may be disrupted by deterioration in weather or security conditions;
- Ever-higher **transportation** costs may continue to drive up prices for various goods.

Monywa Township

Town Market

Supply of food and NFIs worsened in Monywa Town in May, and market activity remained limited.

The town market remained safe and operational in May, although customer activity declined slightly. Supply of most foods as well as hygiene and shelter NFIs grew worse in May, although fuel availability improved a bit. Medicines and shelter NFIs remained particularly scarce. Retailers said shipping costs climbed again in May, although lead-times remained fairly stable. Retailers said the breadth of challenges they faced increased in May, but transportation limits remained most notable among them.



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

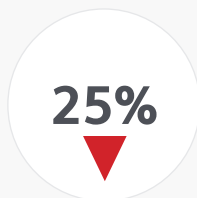
- **Opening Hours:** 4am-6pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Market activity fell slightly in Monywa Town in May, although customers continued to arrive from surrounding areas.

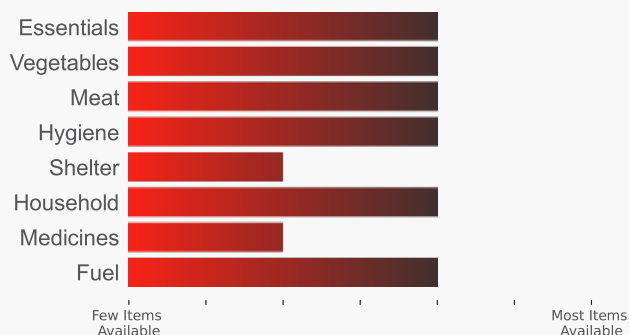
Customers



Retailers



Availability of Goods - Supply of food and NFIs worsened in Monywa Town market in May, while availability of fuel and household NFIs improved. Supply of medicines and shelter NFIs remained most problematic.



Scarce Items

- Rice
- Cooking oil
- Medicines

Transport & Logistics -

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



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



Small Car
80,000 MMK
(from Ye-U)



Small Truck
165,000 MMK
(from Ye-U)



Small Boat
-

Retailer Challenges - Monywa Town retailers reported mounting retail difficulties in May, although transportation remained the primary challenge. Retailer concerns related to weak demand and poor cash access grew louder in May.



Myaung Township

Village Market

Food and NFI supply was stable in the Myaung village market, but poor security deterred some customers. Security conditions in/around the market remained poor in May, although market hours were stable. Fewer customers arrived from neighboring townships in May compared to April. Most foods and NFIs remained available, but medical-related items remained scarce. Shipping costs rose in May, but resupply lead times remained one week. Safety/security conditions remained challenging for retailers, but they continued to report relatively few other notable business challenges.

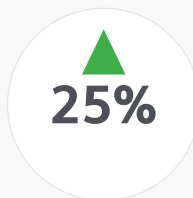


Market Functionality - Market hours were stable and there was no recent damage or closures, but observers still described the market area as unsafe.

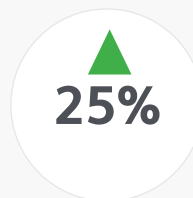
- **Opening Hours:** 6am-5pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Myaung village market activity remained elevated, but poor security still deterred customers from nearby townships.

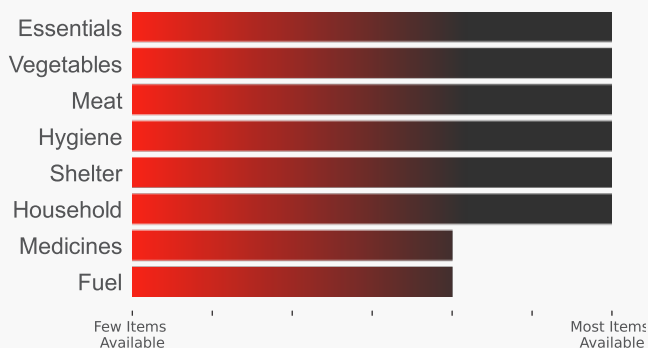
Customers



Retailers



Availability of Goods - Availability of food and NFIs in the Myaung village market was stable and good again in May. Fuel and medicines remained the most difficult items to acquire.



Scarce Items

- Medicines
- Medical equipment
- Cement

Transport & Logistics

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



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



Small Car

-



Small Truck

-



Small Boat

-

Retailer Challenges - Myaung village retailers continued to report very few business-related challenges in May, and market conditions had been quite stable for several months. Safety concerns related to unsafe market conditions remained the most notable challenge for retailers.



Shwebo Township

Town Market

Shwebo Town market remained unsafe, but shelter NFI supply improved and overall supply was good. Market functions were stable in Shwebo Town, and market activity grew slightly as customers continued arriving from nearby townships. Supply of food and NFIs was fairly good and largely unchanged in May. Medicines and fuel remained most scarce. Shipping costs were rising in May, although supply lead-times remained fairly short. Retail challenges were mostly unchanged in May, and retailers faced many challenges; retailers' greatest challenges related to security and transportation checkpoints.

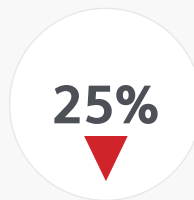


Market Functionality - Market hours were stable and there was no recent damage or closures, but observers described the market area as unsafe.

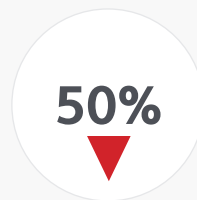
- **Opening Hours:** 6:30am-4:30pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Market activity grew slightly in May but remained below late-2023 levels. Customers continued arriving from nearby townships.

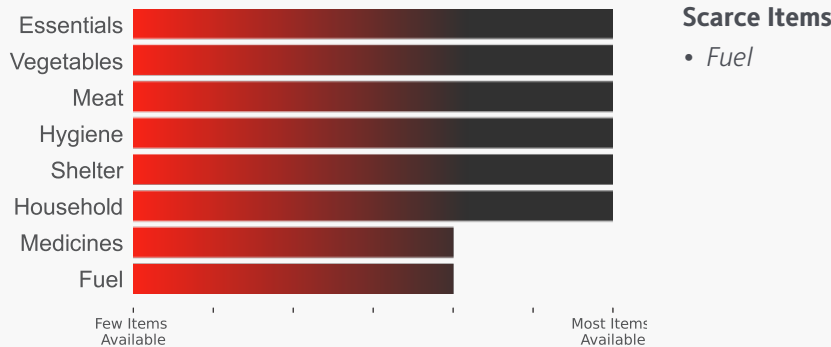
Customers



Retailers



Availability of Goods - Supply of food and most NFIs in Shwebo Town remained good in May, and availability of shelter NFIs improved somewhat. Fuel and medicines remained more scarce than other goods.



Transport & Logistics -

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



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



Small Car
100,000 MMK
(from Mandalay)



Small Truck
250,000 MMK
(Mandalay)



Small Boat
-

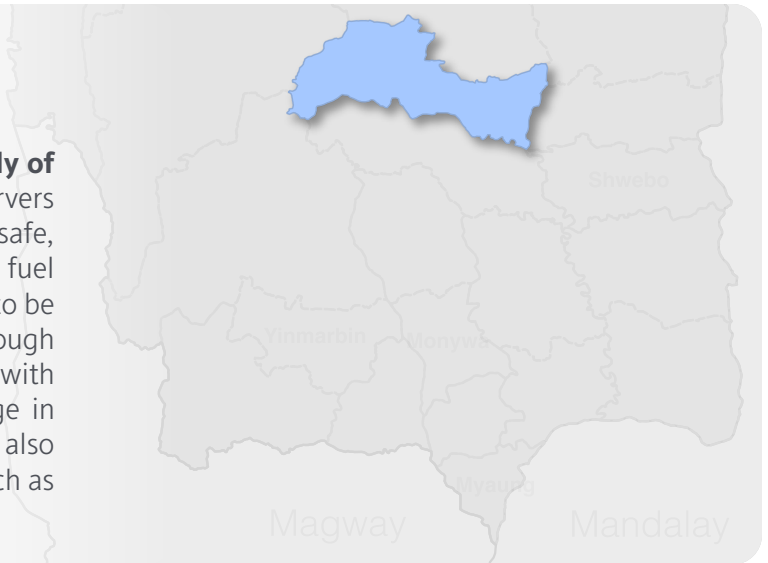
Retailer Challenges - Retail challenges remained numerous and largely unchanged in Shwebo Town in May, although difficulties related to cash access diminished somewhat. Retailers' largest concerns involved security and transportation challenges related to money-collection at checkpoints.



Ye-U Township

Village Market

Ye-U market activity was stable in May, and supply of most food and NFIs remained quite good. Observers continued to describe the Ye-U commercial area as safe, and retail activity was stable. Supply of meat/fish and fuel improved in May, and very few retail items were said to be in short supply. Shipping costs rose again in May, although goods continued to arrive from suppliers in Mandalay with just 2-3 days lead-time. Retailers' greatest challenge in May was weakening customer demand, although they also continued to struggle with many other challenges such as transportation and cash access.

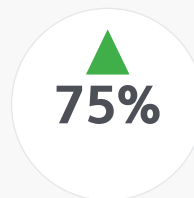


Market Functionality - The daily wet market and commercial area kept regular hours in May, and observers said these areas remained safe for customers.

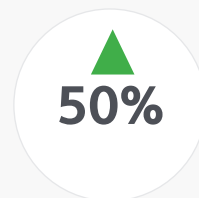
- **Opening Hours:** 6am-5:30pm, periodic.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

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

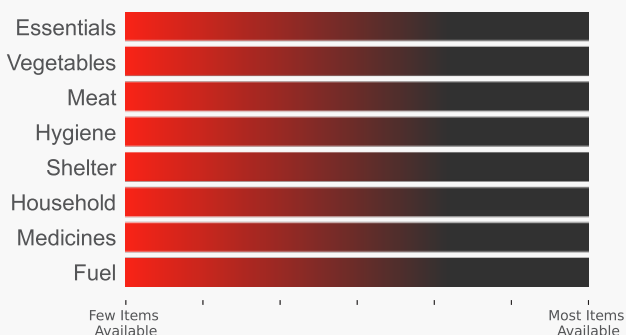
Customers



Retailers



Availability of Goods - Supply of fuel and fish/meat products improved in the Ye-U village market in May, and both food and NFI availability was very good.



Scarce Items

- n/a

Transport & Logistics -

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



50kg Rice Bag
7,000 MMK
(from Monywa)



Small Car
180,000 MMK
(from Monywa)



Small Truck
300,000 MMK
(from Monywa)



Small Boat
-

Retailer Challenges - Ye-U retailers continued to report multiple challenges in May, and they said weak customer demand was their greatest difficulty. Other things such as transportation, security, and cash access continued to present challenges but these were less noteworthy.



Yinmarbin Township

Village Market

Market security improved in the Yinmarbin village in May, and supply of food and NFIs improved as well.

Market security improved and business hours were stable in May. Last month's increased market activity was sustained in May, and activity remained generally higher than last year. Supply of vegetables, medicines, and shelter NFIs improved in Yinmarbin in May, despite rising shipping costs. As market security improved retailers worried less about safety-related business challenges, but they continued to report numerous other challenges such as poor cash access, weak demand, and transportation limits.

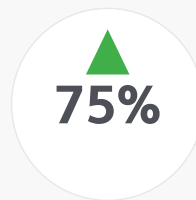


Market Functionality - Market hours were largely stable in May, and security conditions improved slightly. There was no recent damage or closures.

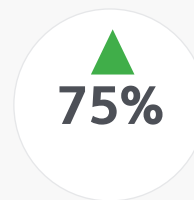
- **Opening Hours:** 5am-4pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Market activity was stable in May and remained higher than last year. Customers arrived from nearby townships and villages.

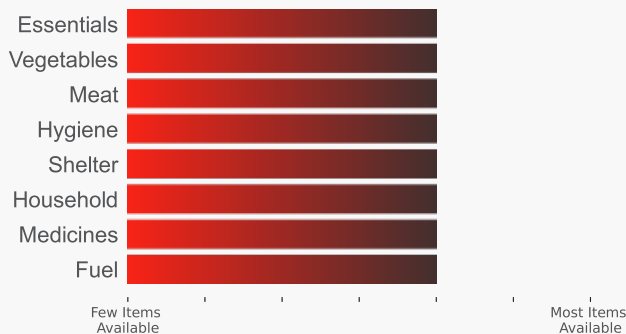
Customers



Retailers



Availability of Goods - Availability of vegetables, medicines, and shelter NFIs improved at the Yinmarbin village market May, but supply of food and NFI remained fairly mediocre overall.



Scarce Items

- *Electronics*

Transport & Logistics -

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



50kg Rice Bag
8,500 MMK
(from Monywa)



Small Car
140,000 MMK
(from Monywa)



Small Truck
250,000 MMK
(from Monywa)



Small Boat
-

Retailer Challenges - Safety/security challenges receded in May as security conditions near the market improved, but transportation, supply, weak demand, and poor cash access all continued to present retailers with notable challenges.



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 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

