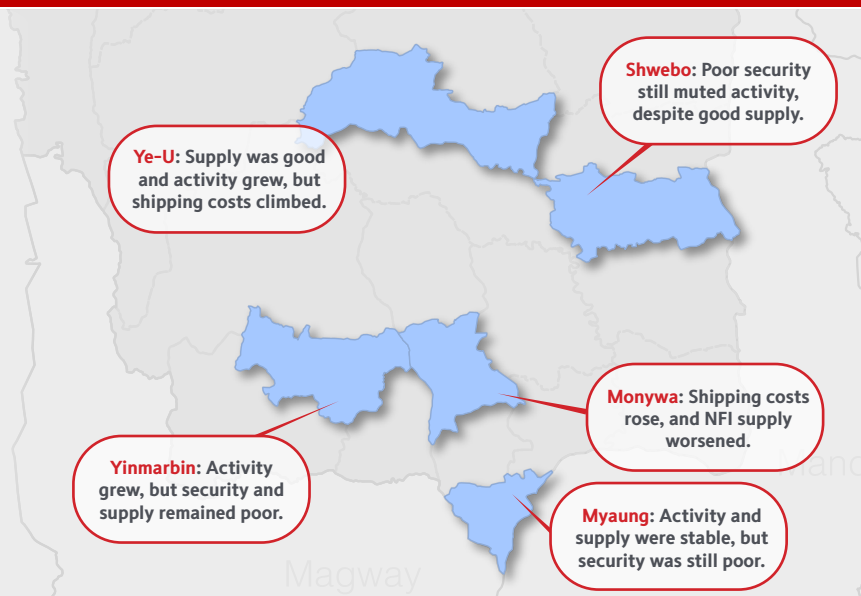


Rapid Market Assessment

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 April 21-29, 2024. Reports available at www.themimu.info/market-analysis-unit.

KEY FINDINGS

- **Security remained poor in three of five markets** monitored, but operations continued uninterrupted;
- **Yinmarbin and Ye-U market activity grew further**, but other markets saw little change in market traffic;
- **Supply worsened in Monywa and Yinmarbin**, but other markets saw fairly decent and reliable supply;
- **Supply of NFIs and vegetables worsened slightly** in April, although supply of essential foods was stable;
- **Shipping costs rose in April and lead-times grew** as more retailers reported transportation challenges;
- **Retailers reported greater challenges this month** than last, especially related to shipping and supply.



Regional Overview

Market Functionality - Despite poor security, market functions were largely unchanged in April. Security worsened in/around the Yinmarbin village market, and observers described three of five markets monitored as "unsafe." Yet markets remained open and there were no reports of new damage or closures.

Market Activity - Customer and retailer activity was mostly stable but grew a bit in Ye-U and Yinmarbin. Ye-U and Yinmarbin markets saw modest growth in customer and retailer activity in April, and Yinmarbin received new customers from surrounding areas. However there was little change in market activity in Shwebo, Monywa, and Myaung markets.

Availability of Goods - Supply worsened in Monywa and Yinmarbin in April, but it was stable elsewhere. Supply of NFIs worsened in Monywa, and supply of various goods worsened in Yinmarbin. All product categories except essential foods saw supply decline somewhat, and household NFIs were down most. Fuel and medicines remained most scarce, although phone top-ups, shelter items, and rice were said to be scarce in some markets.

Transport & Logistics - Shipping costs rose in April, and lead-times grew longer in some markets. Retail-

ers reported rising shipping costs in three of five markets monitored in April (Monywa, Shwebo, Ye-U), and two of these saw supply lead-times grow (Monywa, Ye-U). However supply routes and lead-times otherwise appeared to be mostly unaffected by rising transportation costs in April.

Retailer Challenges - Retail challenges grew in April, and transportation was especially difficult. Retailers in the Monywa and Myaung markets continued to report relatively few business-related challenges, but Shwebo, Yinmarbin, and Ye-U retailers reported more challenges in April than in March. Transportation was most troubling, likely due to rising shipping costs and lead-times. Supply-related challenges also grew in April, while difficulties related to cash access, safety, and demand were emphasized by some retailers as well.

What to Watch

- Rising **transportation** costs may increase **NFI** prices in May and/or reduce supply of these items;
- Tenuous **security** conditions continue to present the risk of market closures disrupting access to goods;
- Stable market operations and **supply** may help these markets weather monsoon season challenges.

Monywa Township

Town Market

Market conditions were stable in Monywa Town, but transportation and NFI supply worsened in April. The market remained safe and operational, and customer traffic was stable after rebounding in March. However supply of NFIs worsened in April, and medicines and fuel remained most scarce. Food items remained largely available, but rice supply was strained. Retailers said shipping costs rose in April, but lead-times were still 1-2 weeks. Such transportation-related issues were the foremost challenge for retailers, although they otherwise reported fewer business challenges in April than in March.

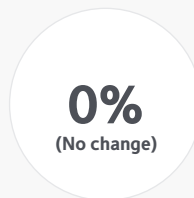


Market Functionality - Market hours were stable, and there was no recent damage or closures. Retailers described the market environment as safe.

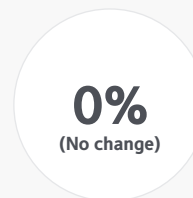
- **Opening Hours:** 7am-5pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Market activity was stable in April after rebounding in March, and customers continued to arrive from surrounding areas.

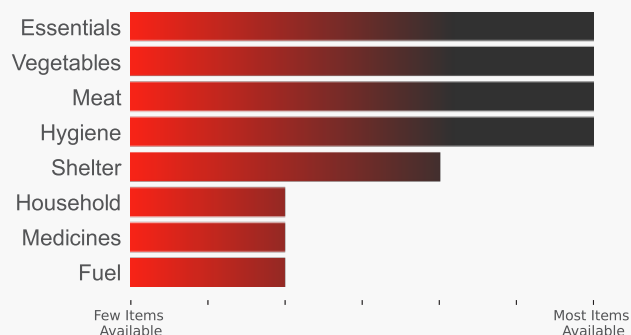
Customers



Retailers



Availability of Goods - Supply of NFIs worsened in Monywa Town market in April, although most food items remained available. Supply of rice, medicines, and fuel remained most problematic.



Scarce Items

- Rice
- Medicines
- Fuel

Transport & Logistics -

- **Inter-Township:** Formal shipping was allowed.
- **Suppliers:** Yangon, Ye-U, Monywa.
- **Lead Time:** 1-2 weeks.
- **Shipping Costs:** Rising.
- **Example Rates:**



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



Small Car
65,000 MMK
(from Ye-U)



Small Truck
140,000 MMK
(from Ye-U)



Small Boat
-

Retailer Challenges - Transportation was the primary challenge for Monywa Town retailers as business conditions improved notably in April. March's uptick in challenges related to about demand, cash, and safety receded in April, although supply concerns remained as NFI availability worsened.



Myaung Township

Village Market

Market conditions were stable in the Myaung village, although retailers still worried about poor security.

Security conditions in/around the market remained poor in April, and market activity was largely unchanged. Most foods and NFIs remained available in the market, although medical equipment and supplies were scarce. Shipping costs and lead times were both stable in Myaung in April, and supply routes were unchanged as well. Safety/security conditions remained the most significant challenge for retailers in Myaung, but overall they reported a stable retail environment with few major difficulties.

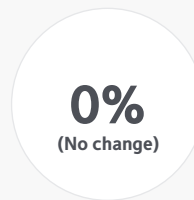


Market Functionality - Market hours were stable and there was no recent damage or closures, yet observers said the market remained relatively unsafe for visitors.

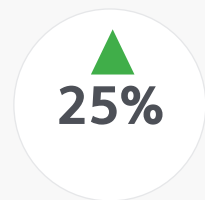
- **Opening Hours:** 6am-4pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Myaung village market activity was mostly stable, although there was some increase in the number of active retailers.

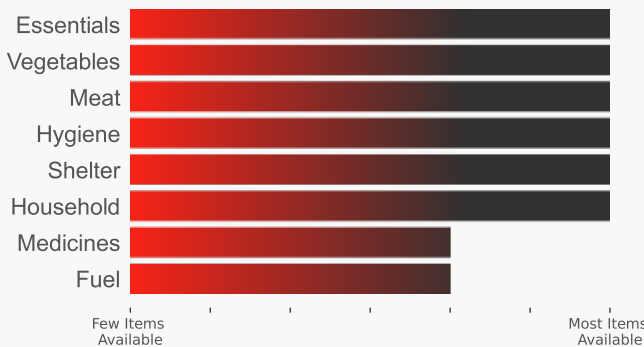
Customers



Retailers



Availability of Goods - Availability of food and NFIs in the Myaung village market was stable and remained relatively good in April. Fuel, medicines, and medical equipment were still more scarce than other items.



Scarce Items

- Medicines
- Medical equipment

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
2,000 MMK
(from Monywa)



Small Car

-



Small Truck

-



Small Boat

-

Retailer Challenges - Myaung village retailers continued to report few business-related challenges in April, as was the case in February and March. Safety remained the most notable concern for retailers as market security remained poor, but there were few other challenges.



Shwebo Township

Town Market

Shwebo Town market was stable and supply was decent, but the market was quiet and challenges grew.

Market functions were stable in Shwebo Town and some customers from nearby townships began returning. However market activity remained very low due to a poor security environment. Supply was unchanged in April and many foods and NFIs were still available, although medicines, fuels, and some other NFIs remained scarce. Supply routes were stable but shipping costs were rising in April. Transportation and safety were retailers' greatest challenges, but they increasingly reported other challenges as well.



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

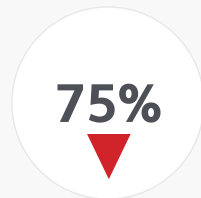
- **Opening Hours:** 6am-5pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Market activity was stable in April and still well below late-2023 levels, although some customers began returning from nearby townships.

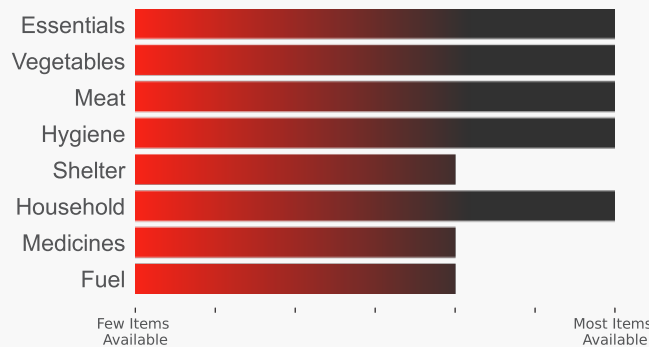
Customers



Retailers



Availability of Goods - Supply of goods in Shwebo Town was largely unchanged in April, and some NFIs remained unavailable. Fuel and medicines were still more scarce than other goods.



Scarce Items

- Medicines
- Fuel

Transport & Logistics -

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



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



Small Car
80,000 MMK
(from Monywa)

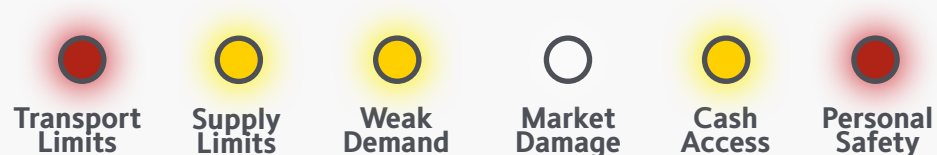


Small Truck
145,000 MMK
(Monywa)



Small Boat
-

Retailer Challenges - Retail challenges mounted in Shwebo Town in April, with limited transportation and poor safety/security foremost on retailers' minds. Poor supply, weak demand, and limited cash access were already challenges in March but they too grew more severe in April.



Ye-U Township

Village Market

Ye-U retail activity grew in April and supply was good, but shipping costs rose and cash access was poor. Observers continued to describe the Ye-U commercial area as safe, and retail activity expanded again in April. Supply of food items remained good, and NFI supply improved. However fuel and phone top-ups were scarce. Mandalay was still a reliable supplier for Ye-U retailers, but shipping costs were rising and lead-times grew slightly longer. Retailers said transportation and supply were rising challenges in April, although poor cash access and related financial concerns remained the most notable challenge.

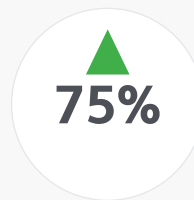


Market Functionality - The daily wet market and local shops held regular hours in March, and observers said the commercial area remained safe to visit.

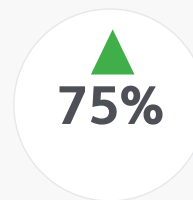
- **Opening Hours:** 6am-5:30pm, periodic.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Market activity remained robust in April, and retailer activity grew again. The market continued serving area villages and townships.

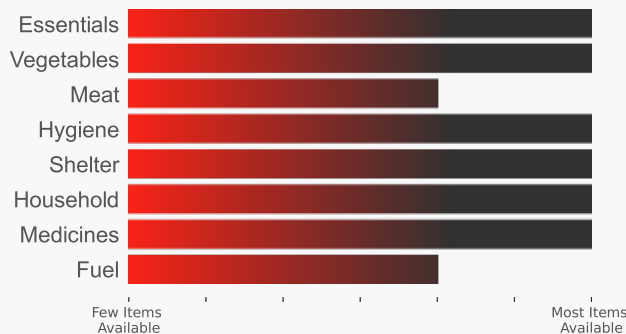
Customers



Retailers



Availability of Goods - Supply of shelter NFIs improved somewhat in the the Ye-U village market, and supply of both foods and NFIs remained generally good. Fuel and phone top-ups remained poorly-supplied.



Scarce Items

- Potatos
- Fruit
- Phone top-ups
- Fuel

Transport & Logistics -

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



50kg Rice Bag
6,000 MMK
(from Monywa)



Small Car
150,000 MMK
(from Monywa)



Small Truck
200,000 MMK
(from Monywa)



Small Boat
-

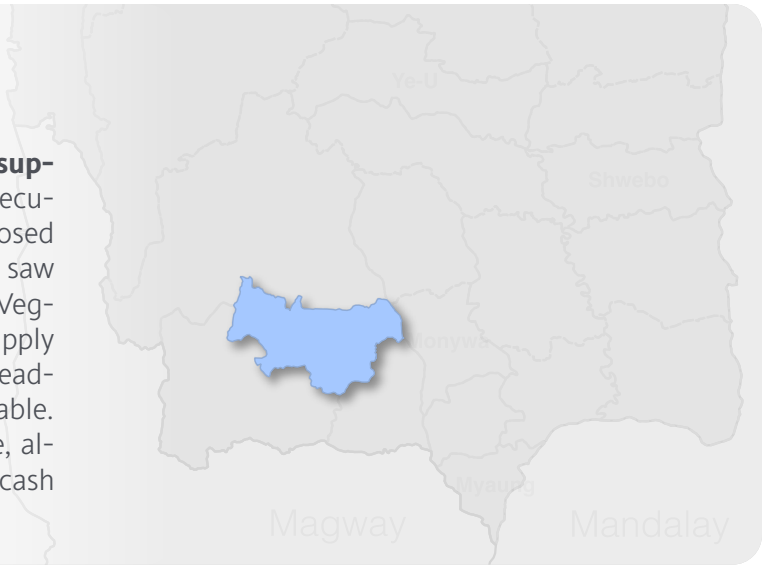
Retailer Challenges - Ye-U retailers reported more challenges in April than in March, with new emphasis on transportation and supply difficulties. Poor access to cash remained retailers greatest challenge, and there were some concerns related to weak demand.



Yinmarbin Township

Village Market

Market activity grew again in April, but security, supply, and access to cash all remained poor. Market security worsened again in April, and the village market closed slightly earlier than usual. Despite this, the market saw some increase in customers from surrounding areas. Vegetable supply dropped sharply in April, and overall supply worsened again after initially improving in March. Lead-times remained quite long but shipping costs were stable. Safety/security remained retailers' greatest challenge, although in April they increasingly worried about poor cash access as well.

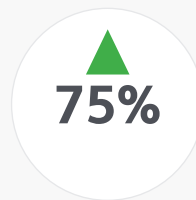


Market Functionality - Market hours grew slightly shorter as market security deteriorated again in April, but operations continued and there were no closures.

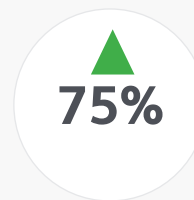
- **Opening Hours:** 6am-4pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Customer and retailer activity continued to grow in April, as more customers arrived from nearby townships and villages.

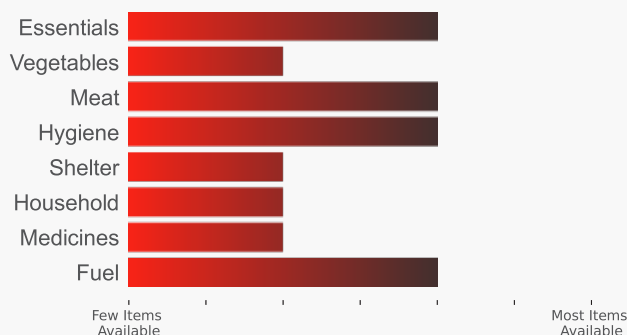
Customers



Retailers



Availability of Goods - Supply of goods at the Yinmarbin village market worsened again in April after improving slightly in March. Supply of vegetables dropped sharply, and supply of hygiene and household NFI's worsened.



Scarce Items

- *Sheet metal*
- *Electronics*

Transport & Logistics -

- **Inter-Township:** Formal shipping was allowed.
- **Suppliers:** Monywa.
- **Lead Time:** 2 weeks.
- **Shipping Costs:** Stable.
- **Example Rates:**



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



Small Car
100,000 MMK
(from Monywa)



Small Truck
175,000 MMK
(from Monywa)



Small Boat
-

Retailer Challenges - Safety/security remained the greatest concern for Yinmarbin retailers in April, but they also faced growing challenges related to transportation and supply. Poor access to cash was increasingly a concern as well in April.



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).

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