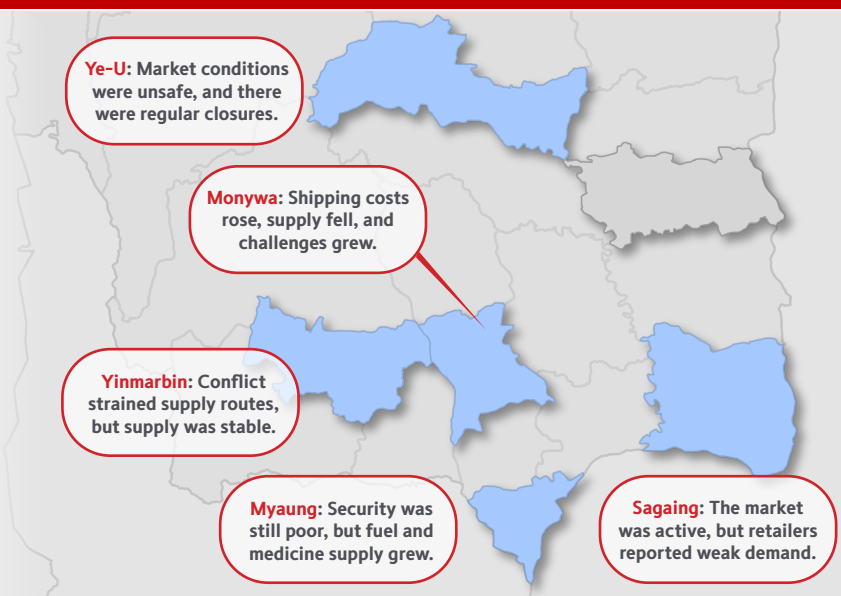


Rapid Market Assessment

This Rapid Market Assessment (RMA) is a supplement to the MAU Market Price Report in Southern Sagaing Region. It provides township-level data on market functionality, activity, supply, and logistics. Data were collected through observation and KIIs with retailers during October 21-22, 2024. Reports available at www.themimu.info/market-analysis-unit.

KEY FINDINGS

- **Periodic closures affected the Ye-U market**, but markets were open even amid poor security;
- **Market activity remained stable**, although it grew in Myaung despite tense a security environment;
- **NFI supply improved but food supply worsened**, driven by disruptions in regional vegetable supply;
- **Retailers said conflict complicated supply routes**, making it harder to move goods between townships;
- **Shipping rates rose again in Monywa**, and out-of-state supply from Mandalay grew more difficult;
- **Transportation and supply challenges grew**, and they were greatest in Monywa and Ye-U.



Regional Overview

Market Functionality - Markets were open throughout the day, but there were increasing signs of operational challenges. Security was poor in/around Myaung and Ye-U markets, and security concerns caused occasional closures at the Ye-U village market in October. The other three markets monitored were reported to be relatively safe, although retailers in Sagaing reported some damage to inventory.

Market Activity - Market activity grew in Myaung but it was stable in Monywa and Myaung. Market activity was mostly-unchanged, and both customer and retailer activity remained fairly sparse in Monywa Town. Customer and retailer activity grew in Myaung market as weather improved, despite persistently poor security conditions. Sagaing Town remained the most active of the markets monitored.

Availability of Goods - Food supply worsened in October, although NFI supply improved a bit. Vegetable supply worsened on reports of supply disruptions, but meat/fish and essential foods remained available. Supply of fuel and medicine—for which supply is generally poorest—improved slightly, but supply of other NFIs was unchanged. Supply improved a bit in Myaung, yet it remained fairly poor there and in Yinmarbin and Monywa.

Transport & Logistics - Shipping costs continued to rise in Monywa as in past months, but retailers elsewhere reported some stability. Monywa retailers said the cost of shipping from Mandalay rose in October, and lead-times remained very long—in some cases weeks. By contrast, retailers in other markets reported shorter lead-times and fairly stable shipping costs within Sagaing Region.

Retailer Challenges - Retail challenges grew as conflict disrupted supply routes in Southern Sagaing. Retailers increasingly reported challenges related to transportation and supply. Monywa and Ye-U retailers reported the most challenges, while those in Sagaing and Myaung reported the fewest. That said, damage to infrastructure and/or inventory was not reported as a major concern for retailers.

What to Watch

- Recent tensions in/near **Monywa** and **Shwebo** may further constrain supply leading into the dry season;
- Increased regional supply may depend on improved trade links between **Mandalay** and Monywa;
- The direction of **food** prices will depend in part on winter **vegetable** supply in the months ahead.

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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