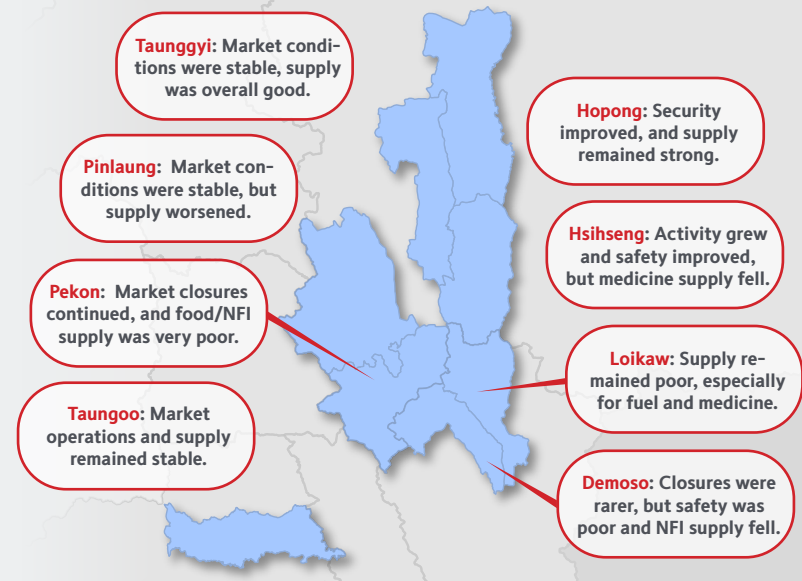


# Rapid Market Assessment

This Rapid Market Assessment (RMA) is a supplement to the MAU Market Price Report in Southern Shan State. It provides township-level data on market functionality, activity, supply, and logistics. Data were collected through observation and KIIs with retailers during December 24-29, 2024. Reports available at [www.themimu.info/market-analysis-unit](http://www.themimu.info/market-analysis-unit).

## KEY FINDINGS

- **Market operations were fairly stable in December** with slightly-improved security and fewer closures;
- **Market activity grew as security improved**, particularly in/around Pekon and Loikaw markets;
- **Food supply stabilized after falling in October**, but it remained quite poor in Pekon, Loikaw, and Demoso;
- **Medicine supply worsened in December**, and it remained much poorer than for other goods;
- **Shipping costs stabilized**, but cash-poor retailers still struggled to cover transportation costs;
- **There was no sign of rising winter supply for foods** like rice or vegetables.



## Regional Overview

**Market Functionality - Market operations and security improved from October to December.** Six-of-eight markets monitored were described as safe, and closures were rare. The main exception was Pekon, where retailers closed at noon and emergency closures sometimes occurred. Market security improved in three markets, but it remained poor in Loikaw and Demoso.

**Market Activity - Retail activity grew in half of all markets monitored, particularly those with improved security.** Customer traffic in Pekon rebounded from October's lows, and traffic continued to grow slowly in Hsihseng as customers arrived from nearby villages. By contrast, retailer and customer activity in Loikaw remained meagre and shrank further. Overall activity remained very low in Loikaw and Hsihseng markets.

**Availability of Goods - Food supply was stable in late-December, but it remained very poor in northern Kayah State.** Supply of medicines and household NFIs declined in December—particularly in Pinlaung—but supply of other NFIs was stable. Meat/fish supply also declined slightly, but supply of other foods was stable. Supply improved only in Taunggyi and Loikaw, and only very slightly. Supply in Loikaw, Pekon, and Demoso remained much worse than in other townships monitored.

**Transport & Logistics - Shipping costs were generally stable in the region, but costs rose in Hsihseng and Loikaw.** December saw more stable shipping costs compared to October when costs were rising. Resupply lead-times also declined slightly, often shaving off one day. Taunggyi, Yangon, and Mandalay remained the main supply centers for retailers in these townships.

**Retailer Challenges - Most retailers reported fewer challenges in December as supply stabilized.** In particular, retailers in more-troubled markets like Hsihseng and Loikaw reported fewer challenges. For example, Loikaw retailers reported fewer challenges related to transportation, supply, and demand. On the other hand, Demoso retailers reported growing security concerns. Retailer concerns otherwise varied, but concerns about poor supply and working capital were very common.

## What to Watch

- Market conditions remained worse in **Hsihseng, Loikaw**, and **Demoso** than in surrounding townships;
- Static **vegetable** supply may be reason for concern at a time when winter harvest should boost supply;
- Poor supply of **medicines**—due largely to shipping restrictions—remains a major concern in the region.

## 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 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.

