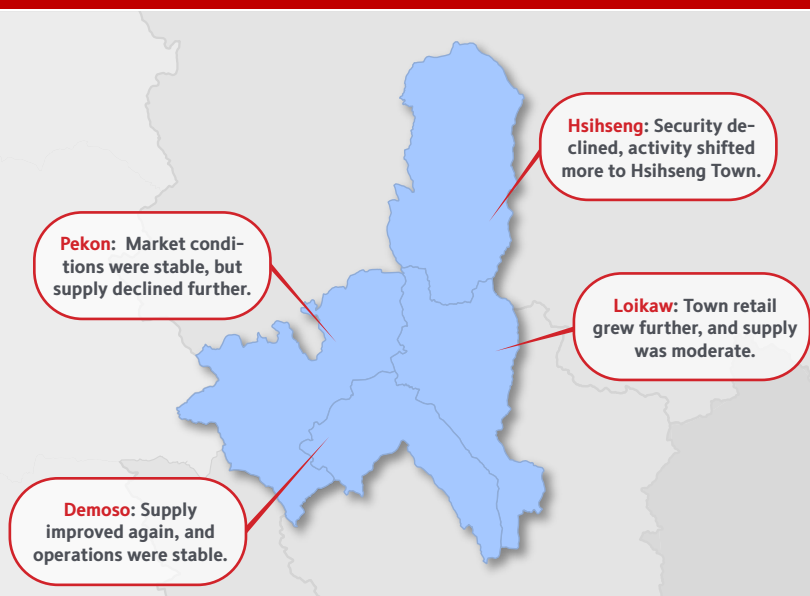


Rapid Market Assessment

This Rapid Market Assessment (RMA) is a supplement to the MAU Market Price Report in Southeast Myanmar. It provides township-level data on market functionality, activity, supply, and logistics. Data were collected through observation and KIIs with retailers during June 21-26, 2024. Reports available at www.themimu.info/market-analysis-unit.

KEY FINDINGS

- **Market security was poor in all four markets**, yet operations were stable and closures were rare;
- **Retail shifted a bit to Loikaw and Hsihseng towns**, but business there was difficult and security poor;
- **Shipping goods to towns was costly**, although lead-times were slightly better than in villages;
- **Supply of food and NFIs was fairly stable** despite rising shipping costs;
- **Loikaw Town market lacked many essential foods**, and only rice was consistently available;
- **Town markets faced numerous retail challenges**, particularly related to security and cash access.



Regional Overview

Market Functionality - Market operations were stable and most functioned all day, yet most were unsafe.

Market hours were generally stable, although Hsihseng retailers extended hours to counterbalance reduced customer activity. There was no reported market damage, but all four markets were considered unsafe and closures occasionally occurred. Retail activity in Hsihseng and Loikaw towns grew slightly in June.

Market Activity - Market activity in Hsihseng and Loikaw shifted further from villages to towns in June.

Customers returned to Hsihseng and Loikaw town markets for a second month in June, although activity remained low overall. Customer and retailer activity was stable in Demoso and Pekon. Inter-township commerce continued, although it was limited in Hsihseng.

Availability of Goods - Supply was unchanged in June, and it remained poorer for NFIs than for foods.

Supply of meat/fish and vegetables was slightly better than other goods, and availability of medicines was poorest. Supply remained poorest in Loikaw, although supply there improved slightly as more retailers operated in/near a new market area established in the town.

Transport & Logistics - Shipping costs continued to

rise across markets in June. Shipping lead-times were slightly shorter for town retailers than for village retailers, and lead times grew even longer for retailers in Demoso. Shipping goods across townships lines remained possible in June, although doing so was still very difficult and costly.

Retailer Challenges - Retailers in Loikaw and Hsihseng towns reported many challenges in June.

Poor transportation and supply were difficult across the region in June, although retailers in Hsihseng and Loikaw towns reported a broader and deeper suite of challenges. For example, poor safety/security and poor access to cash were more prominent among retailers in these towns than among retailers in the village markets. Market-related damage was not a major challenge reported by retailers in June.

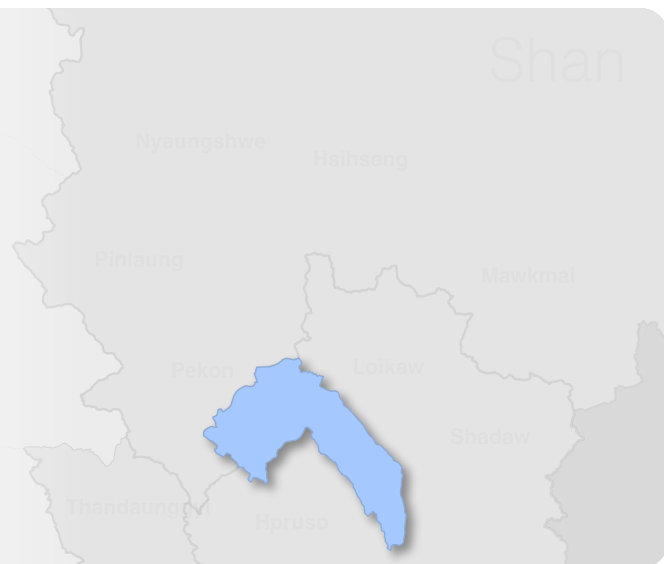
What to Watch

- Tenuous security conditions will determine whether retail shifts further to **Loikaw** and **Hsihseng** towns;
- Rising shipping costs will slow gains in **NFI** supply, which remains inadequate despite improvement;
- Poor **cash access** / working capital will likely remain a key challenge throughout monsoon season.

Demoso Township

Village Market

Supply improved in June, but retailers said sales remained poor and the market was still unsafe. The village market remained open all day in June, and there were no recent closures. Market activity was stable from May to June, although retailers said demand also remained weak. Supply remained moderately-good, and access to vegetables, meat/fish, and fuel improved. Shipping costs were stable and supply networks in Taungoo were intact. Retailers faced many challenges, particularly rain-damage inventory and persistently weak demand; safety/security remained a notable challenge as well.

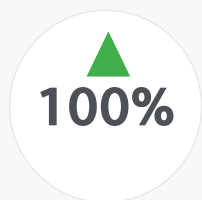


Market Functionality - Market hours were stable, and there were no recent closures. Observers said market security remained unsafe in June.

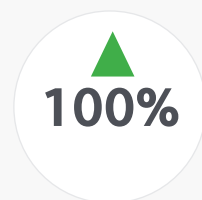
- **Opening Hours:** 7am-6pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous month.

Market Activity - Village market activity was stable in June and remained far above late-2023 levels. Customers still visited from surrounding areas.

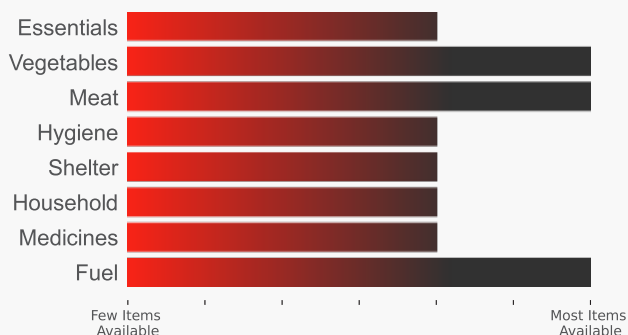
Customers



Retailers



Availability of Goods - Supply improved slightly in June with improved availability of vegetables, meat/fish, and fuel. Overall supply remained moderately-good, and NFIs remained less accessible than foods.



Transport & Logistics -

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Taungoo.
- **Lead Time:** 2 days.
- **Shipping Costs:** Stable.
- **Example Rates:**



50kg Rice Bag
12,000 MMK
(from Taungoo)



Small Car
450,000 MMK
(from Taungoo)



Small Truck
750,000 MMK
(from Taungoo)



Small Boat
-

Retailer Challenges - Demoso retailers continued to face multiple challenges, many of which were driven by monsoon conditions. Weak demand—common during the lean season—was their greatest concern, as well as inventory damage caused by rain. Safety and supply also remained troubling.

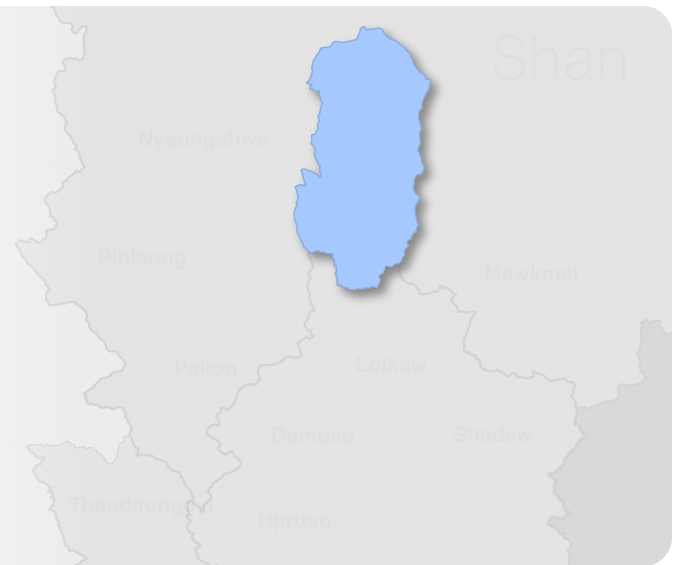


Hsihseng Township

Village Market

Market security worsened in June, and activity contracted as some customers returned to Hsihseng Town.

The Hsihseng village market remained operational and retailers stretched their hours in search of sales, but observers said conditions were increasingly unsafe. Customer activity declined in June due to security developments. Supply nonetheless remained stable and many goods were available. but still fairly low. Shipping costs were stable and supply networks in Taunggyi were intact. Retailers' challenges mounted in June, but they still worried most about their access to cash.

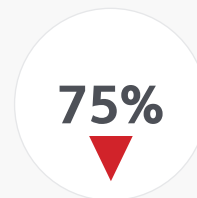


Market Functionality - Market security worsened slightly in June, driving some retailers to sell from alternative locations. As customer frequency shrank some retailers also lengthened their selling hours.

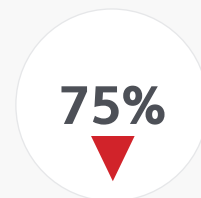
- **Opening Hours:** 6am-4pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous month.

Market Activity - Market activity contracted in June as some customers and retailers returned to Hsihseng Town which they saw as more secure.

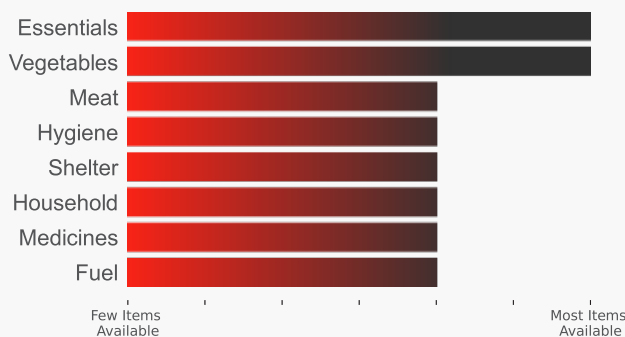
Customers



Retailers



Availability of Goods - Supply was stable in June and still relatively good despite a tense security environment. Many vegetables and essential foods were available as were a number of different NFIs.



Scarce Items

- Medicines

Transport & Logistics -

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Taunggyi.
- **Lead Time:** 1 day.
- **Shipping Costs:** Stable.
- **Example Rates:**



50kg Rice Bag
5,000 MMK
(from Taunggyi)



Small Car
350,000 MMK
(from Taunggyi)



Small Truck
800,000 MMK
(from Taunggyi)



Small Boat
-

Retailer Challenges - Hsihseng village retailers reported more severe business-related challenges in June than in May. Poor cash access was most challenging again in June, but worries about transportation, supply, and safety all grew worse.

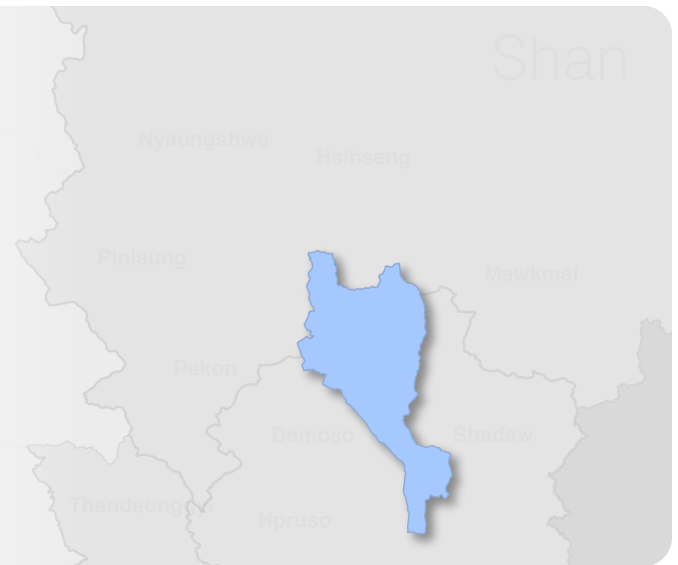


Loikaw Township

Ward Market

Some retailers began operating in Loikaw ward markets, and supply was better than in nearby villages.

The Loikaw ward market operated in mornings and was free of closures, but observers described conditions as unsafe. Customer and retailer activity increased from May to June. Medicines and fuels remained scarce, but supply of various foods and NFIs was moderately-good. Supply arrived from Nyaungshwe and area villages, but shipping costs were rising. Loikaw ward retailers reported face a wide range of serious business challenges, including poor transportation, security concerns, and limited rice supply.

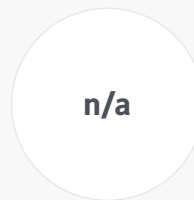


Market Functionality - Ward retailers in Loikaw said market conditions in town were unsafe, yet they still operated during morning hours.

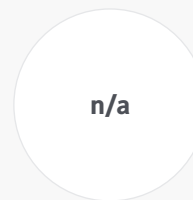
- **Opening Hours:** 6am-10am, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous month.

Market Activity - Loikaw ward markets saw more customers than nearby villages, and many more retailers. Customers increasingly visited from villages.

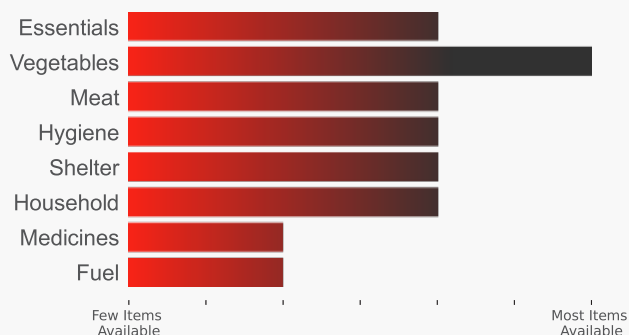
Customers



Retailers



Availability of Goods - NFI supply was better in Loikaw town than in the village previously monitored, particularly for shelter and household NFIs. Supply of rice, medicine, and fuel was poorest.



Scarce Items

- Rice
- Medicines
- Fuel

Transport & Logistics

- **Inter-Township:** Formal shipping allowed at times.
- **Suppliers:** Nyaungshwe, Loikaw villages.
- **Lead Time:** 1 day.
- **Shipping Costs:** Rising.
- **Example Rates:**



50kg Rice Bag
30,000 MMK
(from Nyaungshwe)



Small Car
700,000 MMK
(from Nyaungshwe)



Small Truck
2,000,000 MMK
(from Nyaungshwe)



Small Boat
-

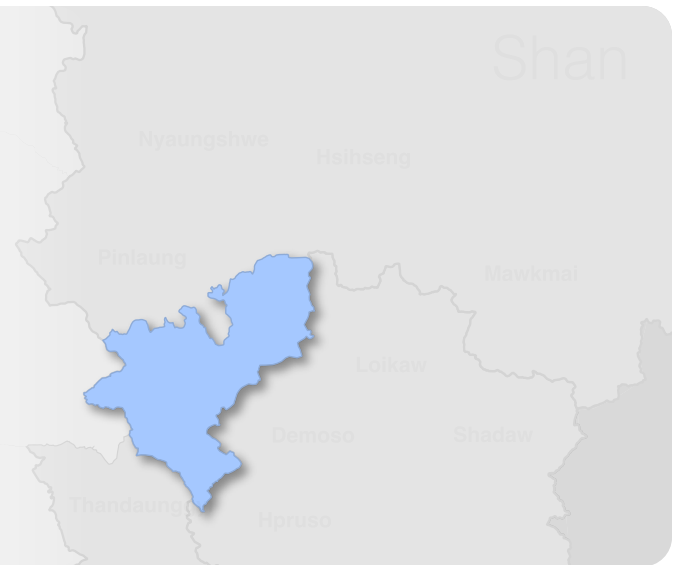
Retailer Challenges - Ward retailers said business challenges in Loikaw Town were numerous and severe. Limited supply of rice, difficulty shipping goods, and concerns for personal safety were Loikaw retailers' greatest challenges in June.



Pekon Township

Village Market

Market operations were stable in the Pekon village, but supply worsened for essential foods and NFIs. The Pekon village market remained open throughout the day in June and activity was stable, despite worsening security. The availability of essential foods and various NFIs grew worse in June, yet supply overall remained moderately-good. Supply continued to arrive from Aungban and Pinlaung, but shipping costs were on the rise. Pekon village retailers appeared to face less severe retail challenges in June than in May, yet safety/security remained their paramount concern.

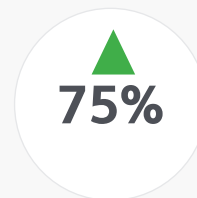


Market Functionality - Market security worsened in June, although retailers continued to operate throughout the day and there was no recent damage or closures.

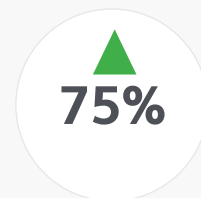
- **Opening Hours:** 7am-7pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous month.

Market Activity - Village market activity was stable in June and remained well above late-2023 levels. Customers still visited from surrounding areas.

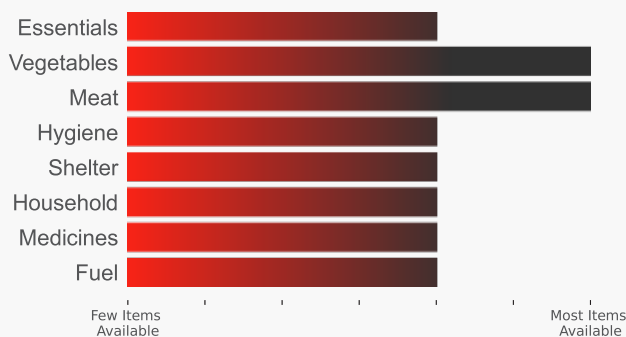
Customers



Retailers



Availability of Goods - Supply worsened in June, particularly for essential foods and NFIs related to hygiene and shelter. Notwithstanding these changes, overall supply remained fair in the Pekon village market.



Scarce Items

- Medicines

Transport & Logistics

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Aungban, Pinlaung.
- **Lead Time:** 1 day.
- **Shipping Costs:** Rising.
- **Example Rates:**



50kg Rice Bag
5,000 MMK
(from Aungban)



Small Car
250,000 MMK
(from Aungban)



Small Truck
-
-



Small Boat
-
-

Retailer Challenges - Poor safety/security remained Pekon village retailers' greatest challenge in June as it was in May. While Pekon retailers continued to face many other challenges, the severity of the challenges they faced receded for a second straight month.



Transport Limits



Supply Limits



Weak Demand



Market Damage



Cash Access



Personal Safety

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.

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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