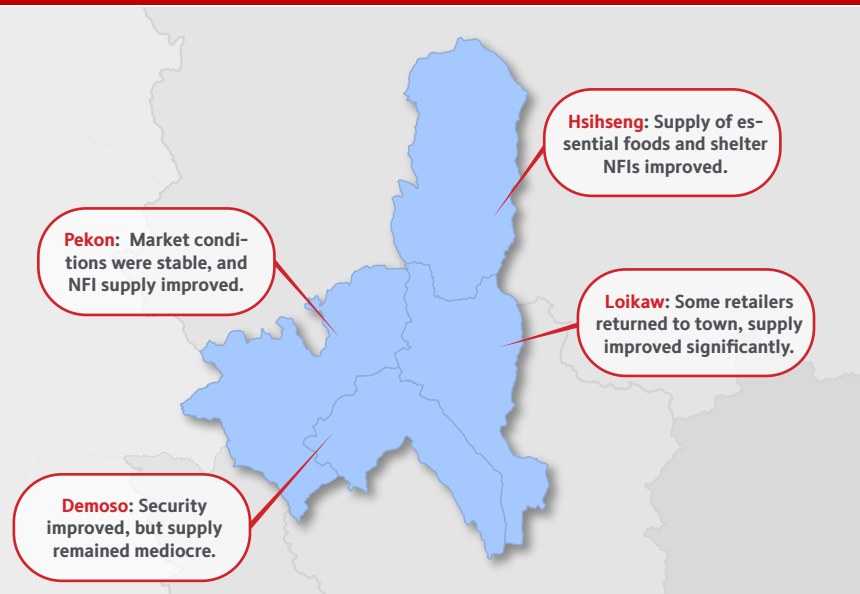


Rapid Market Assessment

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 May 12-14, 2024. Reports available at www.themimu.info/market-analysis-unit.

KEY FINDINGS

- **Market security improved a bit in May** and hours were stable, but conditions were still often unsafe;
- **Some retailers began returning to Loikaw Town**, although market activity was otherwise fairly stable;
- **Transportation costs rose in most markets**, likely driven by poorer monsoon-season road conditions;
- **Supply improved modestly for both food and NFIs**, most notably for critical hygiene and shelter NFIs;
- **Availability of purified drinking water worsened** in three-of-four markets monitored;
- **Retailers struggled with transportation and cash** as security-related concerns receded somewhat.



Regional Overview

Market Functionality - Markets remained open in May, and security improved in Demoso and Loikaw. Market hours were stable and there was no reported market damage or closures in May. Three of four markets monitored were still described by observers as unsafe, although market security was somewhat better in May than in April.

Market Activity - Market activity was largely stable, and some retailers began returning to Loikaw Town. Customer traffic was mostly unchanged in May. Most notably, some retailers began returning to Loikaw town after many months of very little commercial activity there. That said, market activity in Loikaw and Hsihseng still remained much lower than normal.

Availability of Goods - Supply of food and NFIs improved in May, particularly hygiene and shelter NFIs. Supply improved in three of four markets monitored, with the greatest improvement in Loikaw. Supply improved across all categories except for medicines and meat/fish (the latter worsened slightly). Supply of household, shelter, and hygiene NFIs all improved slightly in May.

Transport & Logistics - Shipping costs continued to rise as monsoon rains complicated transportation.

Shipping lead-times were not greatly affected in May, although shipping costs increased in Demoso, Hsihseng, and Loikaw. Sources of supply remained somewhat fluid in the region, but the Southern Shan townships of Pinlaung, Taunggyi, and Aungban remained the most common sources of supply.

Retailer Challenges - Challenges related to transportation and weak demand grew sharply in May. Retailers increasingly struggled with transportation and market demand in May, likely due to the seasonal effect of heavy rains on road conditions and declining purchases by households during the lean monsoon season. Challenges related to safety receded in May, but poor cash access remained as challenging as ever. Demoso retailers reported more challenges in May than in April, while retailers in Pekon and Loikaw reported fewer.

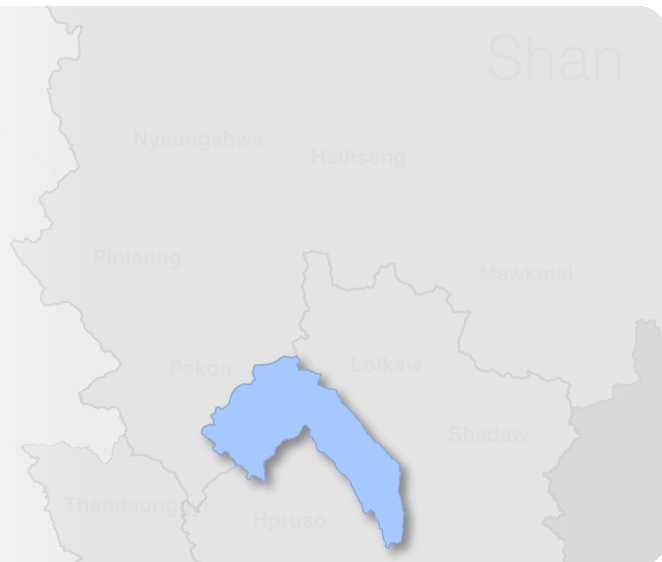
What to Watch

- Improved security may encourage some shift in retail from villages to towns in **Loikaw** or **Hsihseng**;
- Improved supply of **hygiene** and **shelter NFIs** is welcome news but must be sustained for months;
- The cost of **shipping** will likely continue rising, and **lead-times** for long-haul shipments will likely grow.

Demoso Township

Village Market

Market conditions were stable and security improved, but supply was mediocre and challenges persisted. The village market remained operational in May and security conditions improved slightly. Market activity was largely unchanged and remained elevated compared to late-2023 levels. Supply was stable in May, but many goods remained unavailable. Supply of meat/fish, vegetables, and purified drinking water was more dire than other goods. Retailers' greatest challenges related to transportation supply, although retailers continued to face many other challenges as well.

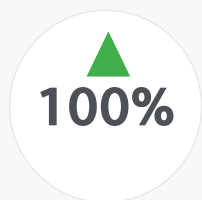


Market Functionality - Market hours were stable, and there were no recent closures. Observers said security conditions improved somewhat in May.

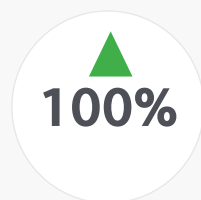
- **Opening Hours:** 7am-6pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

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

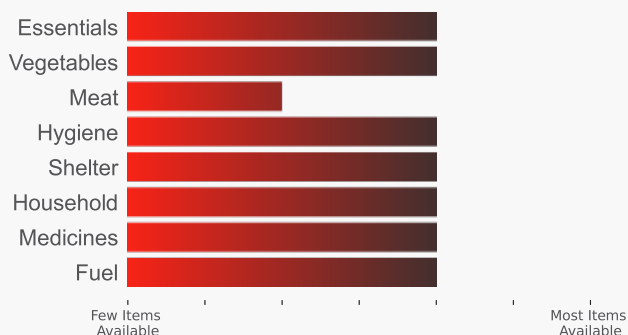
Customers



Retailers



Availability of Goods - Food and NFI supply was stable in May, but many goods remained unavailable at market. Some food items were particularly scarce, such as meat/fish, vegetables, and purified drinking water.



Scarce Items

- *Vegetables*
- *Drinking water*

Transport & Logistics -

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



50kg Rice Bag
9,000 MMK
(from Pinlaung)



Small Car
720,000 MMK
(from Pinlaung)



Small Truck
1,000,000 MMK
(from Pinlaung)



Small Boat
-

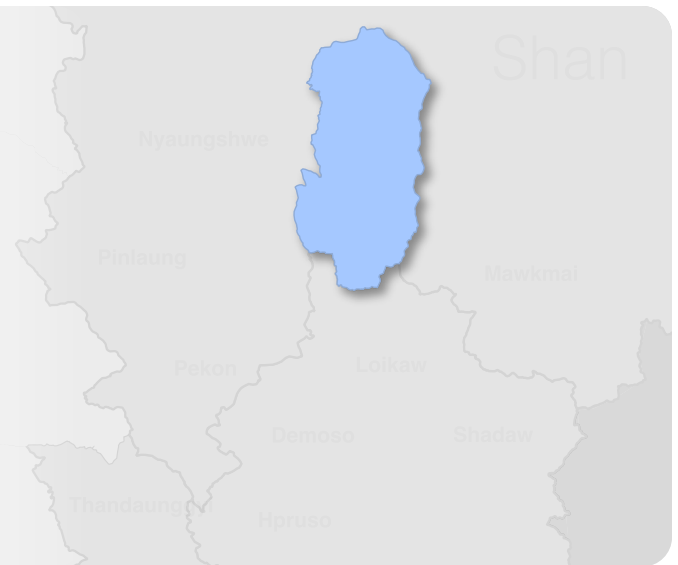
Retailer Challenges - Challenges related to transportation and supply took on new importance in May, as security conditions improved slightly but monsoon road conditions worsened. Retailers also worried more about weak demand at the start of monsoon season. Challenges related to safety and cash access did not go away, but they were less severe this month.



Hsihseng Township

Village Market

Market operations were stable in the Hsihseng village, and supply of essential foods and NFIs improved. The Hsihseng village market remained operational during the morning only, and security conditions remained relatively poor. Customer activity was stable but still fairly low. Supply improved in May, particularly for essential foods and shelter/household NFIs, although availability of purified drinking water worsened. Shipping costs rose in May, but lead-times were unchanged. Retailers continued to face multiple business-related challenges, but they struggled most with cash access.

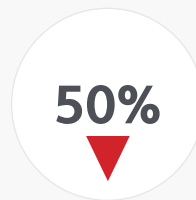


Market Functionality - Market security remained poor in May, but there were no recent market closures and no new market damage in the Hsihseng village.

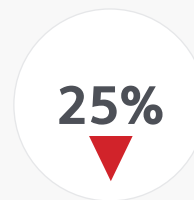
- **Opening Hours:** 7am-12pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Market activity was stable in May as security conditions remained poor. Some customers continued visiting from nearby areas.

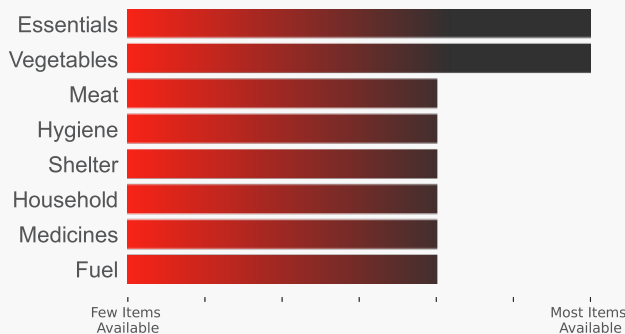
Customers



Retailers



Availability of Goods - Supply improved slightly in May, particularly for essential foods and shelter/household NFIs. Supply of foods was better than for NFIs, although availability of purified drinking water worsened in May.



Transport & Logistics -

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



50kg Rice Bag
4,000 MMK
(from Taunggyi)



Small Car
300,000 MMK
(from Taunggyi)



Small Truck
700,000 MMK
(from Taunggyi)



Small Boat
-

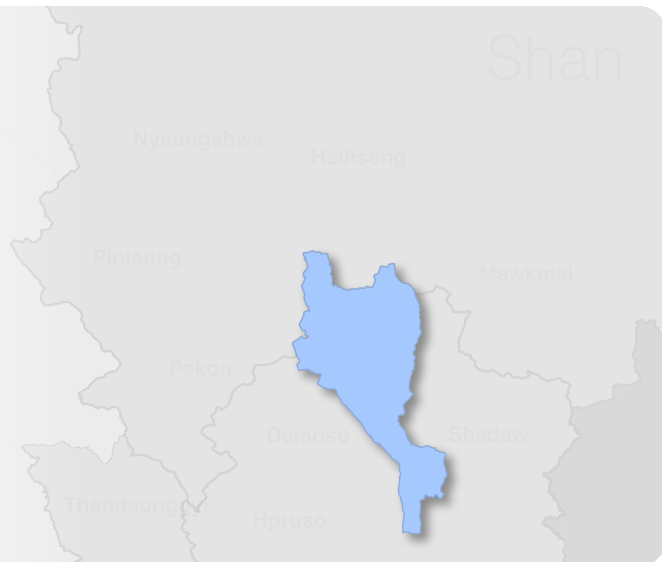
Retailer Challenges - Hsihseng village retailers reported fewer business-related challenges in May than in April. Poor cash access and related financial challenges remained most prominent again in May, and worries about weak monsoon season demand grew. Supply and transportation remained challenging as well.



Loikaw Township

Village Market

Village market conditions improved in May, and some retailers began returning to Loikaw Town. Village market security improved slightly in May, and operations were stable. Supply improved significantly for hygiene NFIs and fuel, although availability of shelter and household NFIs remained extremely poor in the village market. Local shipping costs fell slightly in May, but lead-times were largely unchanged. Retailers continued to face many challenges, although these were less severe in May than in April. Transportation challenges were most pressing for retailers leading into the monsoon season.



Market Functionality - Village retailers continued selling from homes during morning hours, and security conditions improved slightly in May.

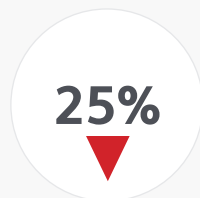
- **Opening Hours:** 6am-12pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Village market activity grew slightly as security improved, but it still remained low. Customers still visited from nearby areas.

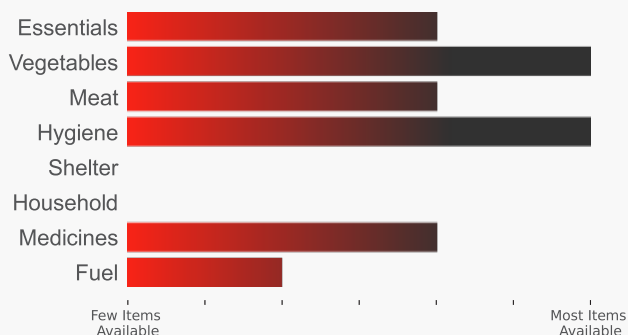
Customers



Retailers



Availability of Goods - Supply improved significantly in Loikaw, although it still remained much worse than in other markets. Supply of hygiene NFIs improved greatly, and vegetable and fuel supply improved slightly.



Scarce Items

- *Cooking oil*
- *Drinking water*

Transport & Logistics -

- **Inter-Township:** Formal shipping allowed at times.
- **Suppliers:** Nyaungshwe, Demoso.
- **Lead Time:** 2 days.
- **Shipping Costs:** Falling
- **Example Rates:**



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



Small Car
600,000 MMK
(from Nyaungshwe)



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



Small Boat
-

Retailer Challenges - Loikaw village retailers reported fewer challenges in May than in April, although many conditions still made retail difficult. Transportation challenges were greatest, while supply, demand, and poor cash access also presented difficulties.

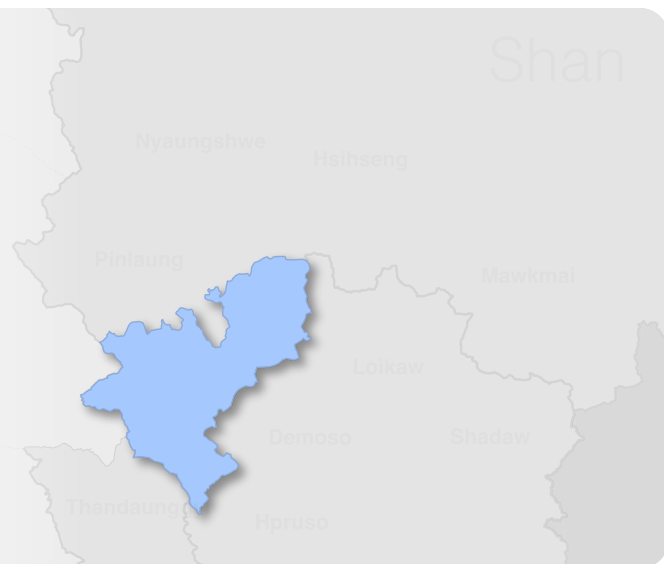


Pekon Township

Village Market

Pekon village market conditions were stable in May, and business-related challenges receded somewhat.

Market operations were stable and activity remained relatively high in the Pekon village market. Customer traffic remained well-above late-2023 levels. Supply of household and shelter NFIs improved in May, and overall availability of food and NFIs was quite good. Shipping costs were stable, but transportation lead-times increased slightly as monsoon road conditions worsened. Safety/security remained retailers' greatest challenge, although overall business challenges receded somewhat in May.

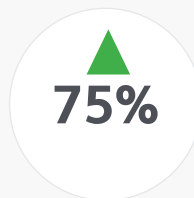


Market Functionality - Market hours were stable and observers described the market area as relatively safe. There was no recent damage or closures.

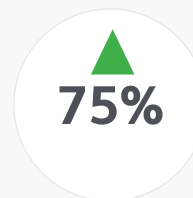
- **Opening Hours:** 7am-6pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

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

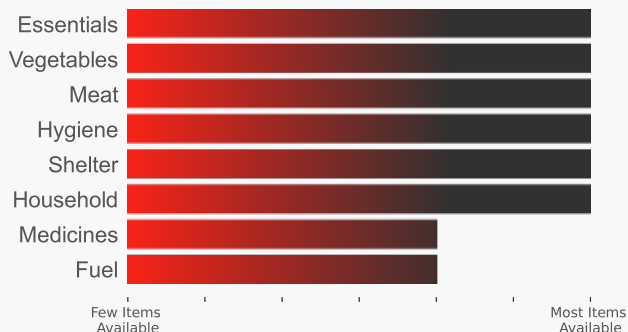
Customers



Retailers



Availability of Goods - Supply of most items remained relatively good in May, and availability of household and shelter NFIs improved. Supply remained poorest for fuel and medicines.



Scarce Items

- Medicines
- Fuel

Transport & Logistics -

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Aungban.
- **Lead Time:** 1-3 days.
- **Shipping Costs:** Stable.
- **Example Rates:**



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



Small Car
250,000 MMK
(from Aungban)



Small Truck
800,000 MMK
(from Aungban)



Small Boat
-

Retailer Challenges - Retail challenges generally receded in May, although safety/security remained paramount. Challenges related to weak demand and poor cash access diminished as market activity grew slightly, yet many challenges remained.



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 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 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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