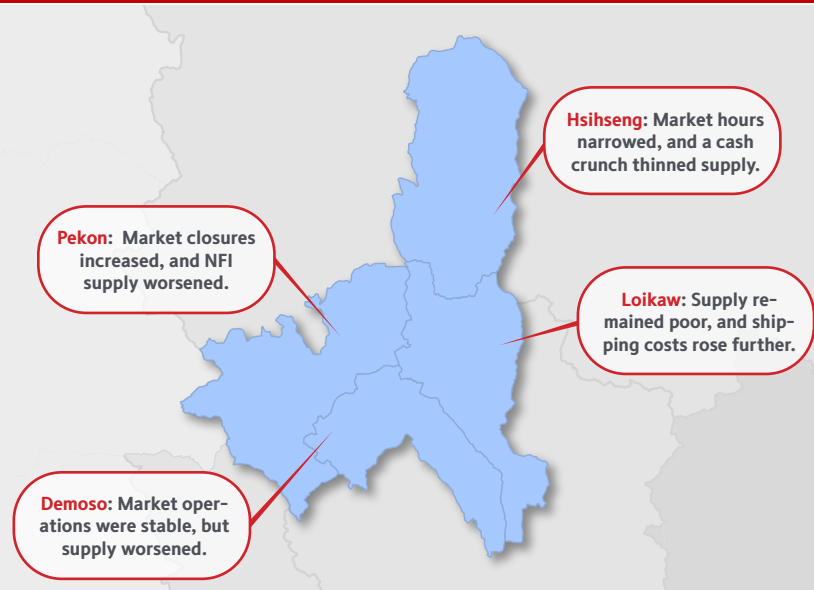


Rapid Market Assessment

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 April 9-16, 2024. Reports available at www.themimu.info/market-analysis-unit.

KEY FINDINGS

- **Security in/around markets declined in April**, yet most markets monitored continued to operate;
- **Customer traffic continued to ebb in Hsihseng**, but elsewhere market activity was stable;
- **Supply of food and NFIs grew worse in April**, and Loikaw continued to struggle most to access supply;
- **Supply of shelter and household NFIs worsened**, and it was poorer than other product types;
- **Shipping rates rose further Hsihseng and Loikaw**, but they were stable in Pekon and Demoso;
- **Concerns over security and poor cash access grew**, and some retailers worried about their solvency.



Regional Overview

Market Functionality - Markets remained open, but security was poor and closures continued. Retailers continued operating daily, but three of four markets monitored were described as unsafe or very unsafe. Village markets in Loikaw and Pekon experienced closures, and infrastructure damage affected retail in Loikaw.

Market Activity - Conflict continued to reduce market activity, and customer traffic dwindled in Hsihseng. Customer traffic was mostly unchanged in April. Some markets remained quieter than they once were (Loikaw, Hsihseng) while others still benefited from new customer arrivals in recent months (Pekon, Demoso).

Availability of Goods - Supply worsened by mid-April, and shelter and household NFIs grew scarcer. Supply worsened at least somewhat in three of four markets monitored in April. Both food and NFI items became more scarce, although supply remained better for food items than for NFIs. Loikaw still had far worse access to supply than the other markets monitored.

Transport & Logistics - Shipping costs continued to rise in Loikaw and Hsihseng. Inter-township shipping remained limited in Loikaw and Hsihseng, and this continued to drive up shipping costs; costs were stable in

Pekon and Demosos. Sources of supply remained diverse and shifted as events unfolded (e.g., Hopong, Pinlaung, Aungban, Taunggyi, Nyaungshwe).

Retailer Challenges - Poor security and cash access remained retailers' greatest challenges. Challenges related to safety and poor supply grew further in April, and poor cash access remained troubling as some retailers worried about solvency. Retail operations grew more difficult in Loikaw and Pekon in April.

Possible Interventions - Hsihseng retailers felt they could increase supply with support. Fuel subsidies and safe transport corridors remained popular, but interest in infrastructure repair also grew in April amid reports of damage. Despite rising concerns about poor cash access, fewer retailers expressed interest in new loans.

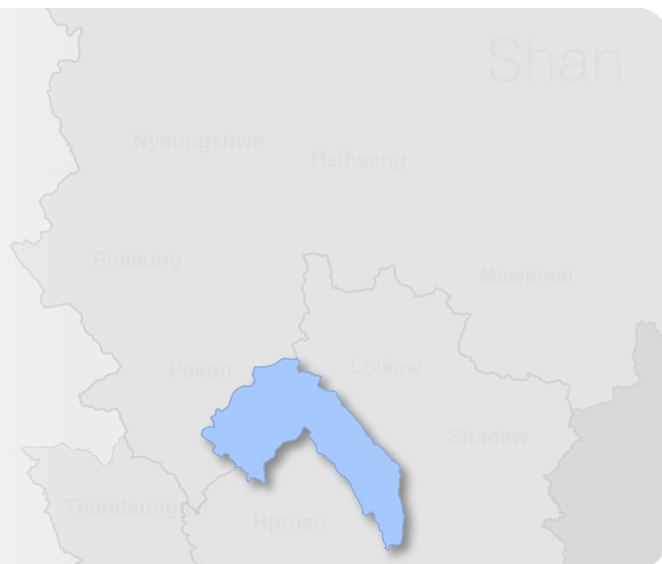
What to Watch

- Insufficient **hygiene** and **shelter NFIs** may increase water- and vector-borne illness in monsoon season;
- Rising conflict in **Pekon, Hsihseng** and **Loikaw** townships may spur more market closures in May;
- Rising shipping costs and poor cash access will likely remain major retail challenges in May.

Demoso Township

Village Market

Conditions were stable in the Demoso village market in April, but supply of food and NFIs worsened. The village market remained operational in April but observers said the local security environment worsened. Customer traffic was nonetheless unchanged and remained higher than normal. Availability of both food and NFIs worsened by mid-April, as vegetable supply tapered off and household and hygiene NFIs became more scarce. Retailers shifted routes to continue supplying goods from Shan State, yet shipping costs were stable. Poor security and cash access remained retailers' major challenges.

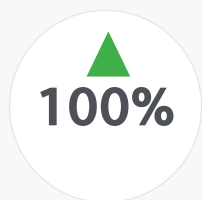


Market Functionality - Market hours were stable, and there were no recent closures, but observers said security conditions grew much worse in mid-April.

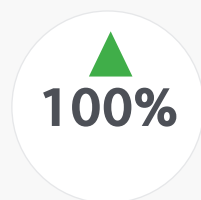
- **Opening Hours:** 7am-6pm, daily.
- **Market Security:** Very unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

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

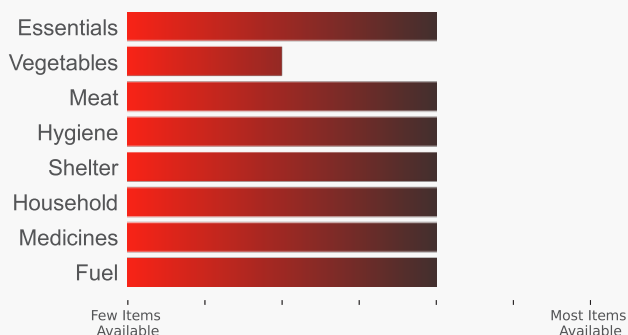
Customers



Retailers



Availability of Goods - Supply worsened for both food and NFIs in April. Vegetable supply declined most, but so did supply of essential foods and household and hygiene NFIs. Availability of goods was moderate overall.



Scarce Items

- *Fresh fish*

Transport & Logistics -

- **Inter-Township:** Formal shipping allowed.
- **Suppliers:** Aungban, Yangon, Pinlaung.
- **Lead Time:** 2 days.
- **Shipping Costs:** Stable.
- **Example Rates:**



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



Small Car
190,000 MMK
(from Pinlaung)



Small Truck
645,000 MMK
(from Pinlaung)



Small Boat
-

Retailer Challenges - Poor safety/security and access to cash remained the major challenges for retailers in April. Concerns about potential infrastructure damage also grew as security in/around the market grew worse. Although market inventory worsened, retailers did not describe supply as a major challenge.

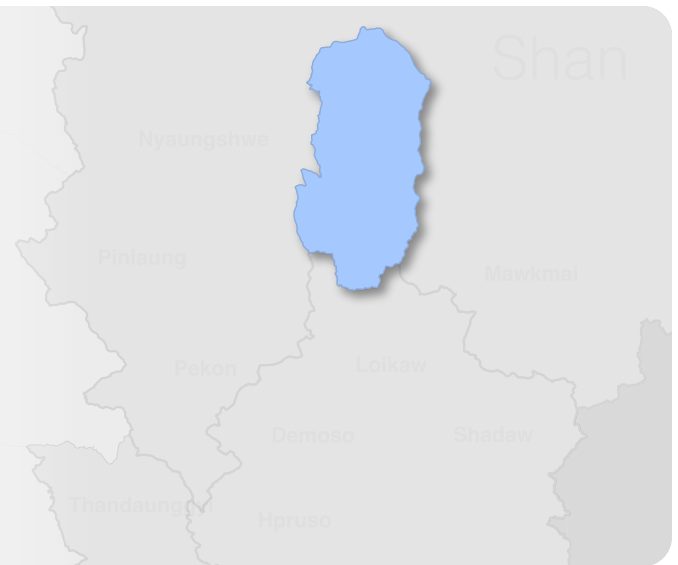


Hsihseng Township

Village Market

The Hsihseng village market cut hours in April, and supply worsened as some retailers faced a cash crunch.

Market conditions remained unsafe in mid-April, and retailers reduced selling hours to mornings-only. Security concerns caused customer traffic to dip further, but supply of goods was mostly unchanged. Availability of goods remained poor in many cases, with shelter and household NFIs most scarce. Shipping costs continued to rise for Hsihseng retailers in April. Retailers faced multiple challenges, but they worried most about supply access, safety, and the solvency of their business operations.

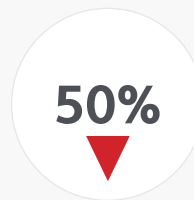


Market Functionality - Market security remained poor in April, operating hours were reduced, and occasional closures halted commercial activity in the Hsihseng village.

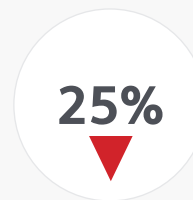
- **Opening Hours:** 7am-12pm, daily.
- **Market Security:** Unsafe.
- **Market Damage:** No recent damage.
- **Closures:** No closures in previous week.

Market Activity - Market activity fell further in April as security conditions continued to deter customers; however, some still visited from nearby areas.

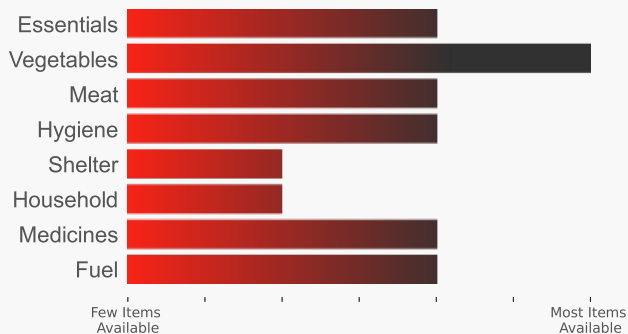
Customers



Retailers



Availability of Goods - Supply was unchanged in April, and NFI supply remained poorer than for foods. Only vegetables were well-stocked, and shelter and household NFIs were particularly scarce.



Scarce Items

- Purified water
- Medicines
- Fuel

Transport & Logistics

- **Inter-Township:** Formal shipping not allowed.
- **Suppliers:** Hopong, Taunggyi.
- **Lead Time:** 1 day.
- **Shipping Costs:** Rising.
- **Example Rates:**



50kg Rice Bag
15,00 MMK
(from Taunggyi)



Small Car
400,000 MMK
(from Taunggyi)



Small Truck
1,100,000 MMK
(from Taunggyi)



Small Boat
-

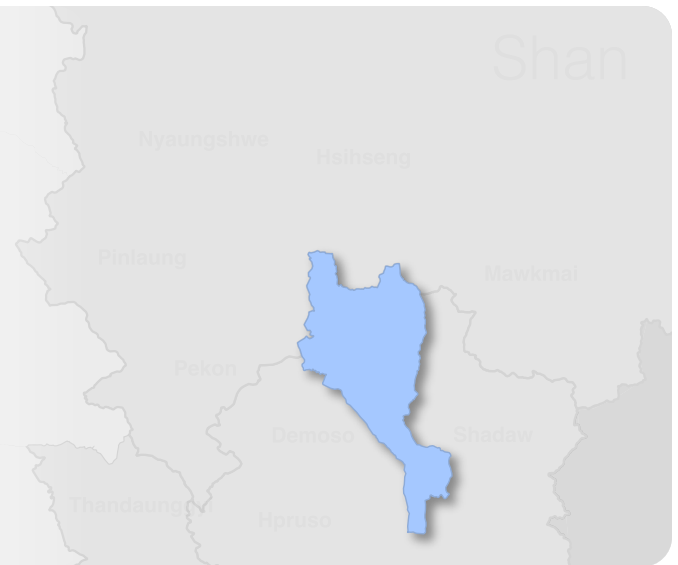
Retailer Challenges - Hsihseng village retailers grew worried about business solvency in April as challenges mounted. Retailers reported more challenges related to transportation and supply, but they also voiced worries about their own financial health and access to cash; safety also remained a notable challenge.



Loikaw Township

Village Market

Market conditions remained difficult and supply was still very poor in the Loikaw village in April. Village retailers continued selling from their homes despite some infrastructure damage and very unsafe conditions. Village market activity was stable but muted, even as customers continued to arrive from nearby villages. Supply of goods was unchanged in April and remained very poor; NFIs were largely unavailable, and some foods were unavailable in the village. As shipping costs continued to rise, retailers said limited supply and poor cash access remained their greatest challenges.

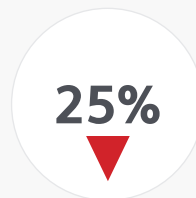


Market Functionality - Village retailers continued selling from homes during morning hours, but conditions were unsafe. At least one retailer halted selling due to structural damage from a projectile.

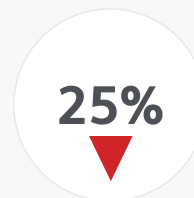
- **Opening Hours:** 7am-12pm, daily.
- **Market Security:** Very unsafe.
- **Market Damage:** Limited structural damage.
- **Closures:** Limited market closures.

Market Activity - Village market activity was unchanged in April but remained slightly lower than last year. Customers still visited from nearby areas.

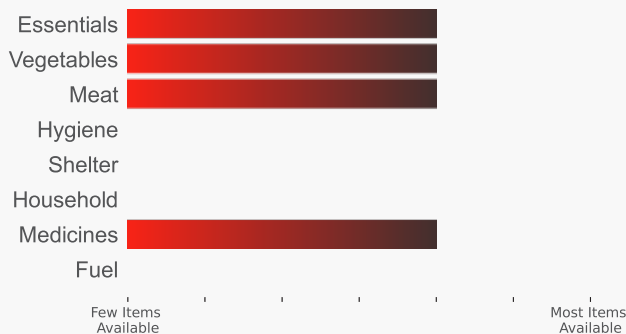
Customers



Retailers



Availability of Goods - Supply of goods in the village market remained very poor in April. Most NFIs were largely unavailable in the village, with the exception of critical medicines. Food supply also remained poor.



Scarce Items

- Rice
- Cooking oil
- Medicines
- Fuel

Transport & Logistics

- **Inter-Township:** Formal shipping not allowed.
- **Suppliers:** Nyaungshwe, Demoso.
- **Lead Time:** 3-7 days.
- **Shipping Costs:** Rising
- **Example Rates:**



50kg Rice Bag
100,000 MMK
(from Nyaungshwe)



Small Car
750,000 MMK
(from Nyaungshwe)



Small Truck
2,500,000 MMK
(from Nyaungshwe)



Small Boat
-

Retailer Challenges - Loikaw village retailers continued to face numerous challenges. Limited supply and access to cash remained major challenges for Loikaw village retailers, and both grew more severe in April. Poor safety and transportation remained challenging as well.

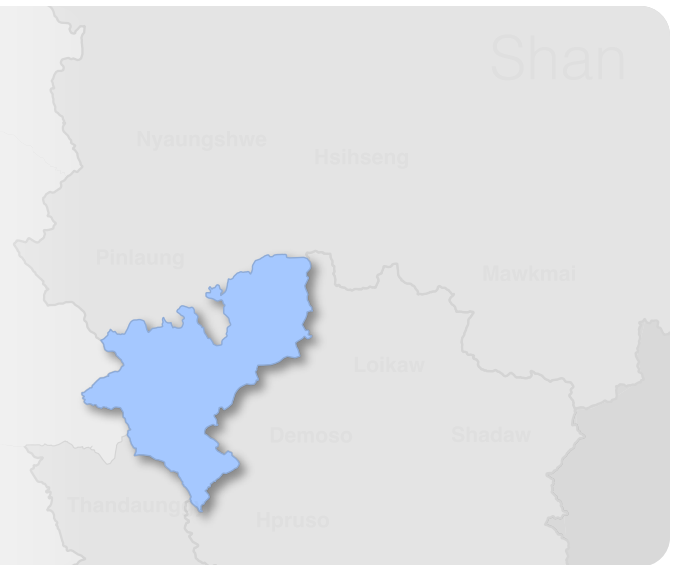


Pekon Township

Village Market

The Pekon village market still operated between closures, but security and cash access worried retailers.

Occasional closures shuttered the market in April, but operations otherwise continued as normal. Customer traffic was unchanged in April and remained well-above late-2023 levels. Supply of household and shelter NFIs worsened, but overall availability of food and NFIs was relatively good. Retailers ordered supply from Demoso and shipping prices were stable. Retailers' safety-related challenges grew in April, and they continued to struggle with poor access to cash.

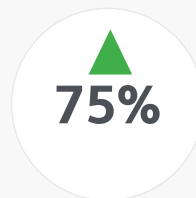


Market Functionality - Market hours were stable and observers described the area as relatively safe, yet occasional closures shuttered the market.

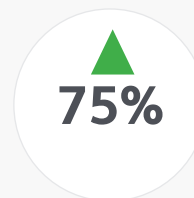
- **Opening Hours:** 7am-6pm, daily.
- **Market Security:** Safe.
- **Market Damage:** No recent damage.
- **Closures:** Limited market closures.

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

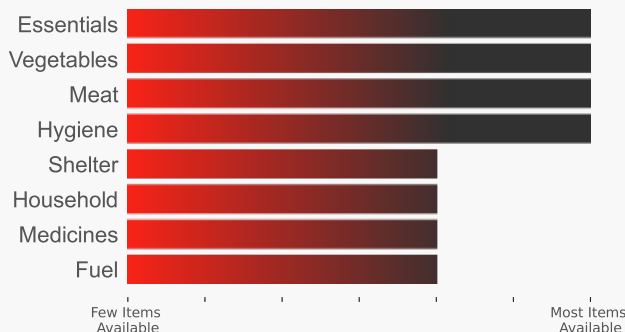
Customers



Retailers



Availability of Goods - Supply of most items remained relatively good in mid-April, although availability of household and shelter NFIs worsened. Supply remained poorer for fuel and medicines than for other goods.



Scarce Items

- *Cooking oil*

Transport & Logistics

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



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



Small Car
720,000 MMK
(from Demoso)



Small Truck
1,440,000 MMK
(from Demoso)



Small Boat
-

Retailer Challenges - Security-related challenges grew notably worse in April, while access to cash also remained a major challenge. Moreover, concerns about weak demand remained as transportation and supply limits experienced in February resurfaced again 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 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).

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