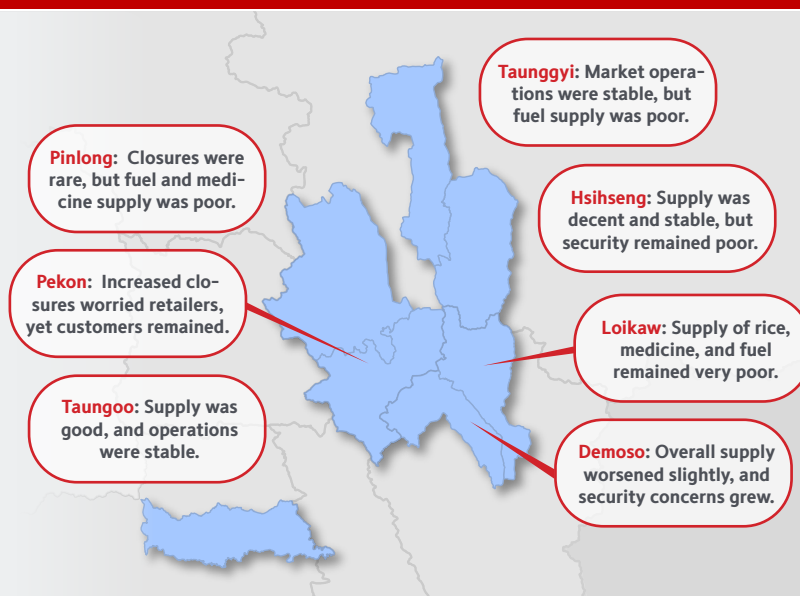


Rapid Market Assessment

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 August 20–26, 2024. Reports available at www.themimu.info/market-analysis-unit.

KEY FINDINGS

- **Market saw more frequent closures in August**, particularly in Pekon but elsewhere as well;
- **Customer traffic grew in some markets**, as limited hours compressed sales into a narrower window;
- **Shipping costs continued to rise**, although they were reportedly stable in Demoso and Pinlong;
- **Supply of food and NFIs was fairly stable**, although supply of meat/fish and vegetables fell slightly;
- **Supply was poorer in the least-unstable markets**, in contrast to others like Taunggyi and Taungoo;
- **Poor security worried Pekon and Demoso sellers**, and cash access was a common concern regionwide.



Regional Overview

Market Functionality - Market closures increased in August and security was often poor. The more-unstable markets of Pekon, Demoso, Loikaw, and Hsihseng were still viewed as unsafe, while Pinlaung, Taunggyi, and Taungoo were relatively safe. Market damage remained rare, but five-of-seven markets saw temporary closures, and closures grew frequent in Pekon.

Market Activity - Pekon, Demoso, and Hsihseng markets grew more active, yet they were still far quieter than Taunggyi and Taungoo. Customer activity swelled in Pekon as frequent closures made the market more crowded during hours of operation. Markets in Demoso and Hsihseng also rebounded from muted activity in June, while activity declined slightly in Loikaw. Markets in Taunggyi, Taungoo, and Pinlaung were quite active.

Availability of Goods - Supply was generally stable, but the most-troubled markets lagged behind in essential foods and shelter NFIs. Food supply declined slightly as fewer vegetables and meat/fish items were available at market. NFI supply was generally stable. Supply remained worst in Loikaw, although it declined in Demoso in August. Supply was best in Pinlaung, Taunggyi, and Taungoo, particularly for essential foods and shelter NFIs.

Transport & Logistics - Shipping costs continued rising in most markets. Shipping costs rose across the region, except in Pinlong and Demoso where retailers reported little change. Shipping lead-times were still relatively short, with most retailers able to restock available items within one or two days. Taunggyi was a common source of supply, as well as various villages in the region.

Retailer Challenges - Security concerns grew in Pekon and Demoso. Security concerns grew in August, particularly in Pekon and Demoso where there were also concerns about damage to retail inventory. That said, the broadest and most severe set of challenges reported by retailers were in Loikaw and Hsihseng where supply and cash limits were most prominent. Taunggyi and Taungoo retailers reported far fewer challenges than elsewhere, but they too worried about access to cash.

What to Watch

- Seasonal flooding is likely to have a significant impact on **supply**, particularly in villages;
- Rising shipping costs will likely further increase prices for foods and particularly **NFIs** like hygiene items;
- Market **activity** will likely remain muted through monsoon season, especially if rains limit transport.

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).

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