May 2025

Rapid Market Assessment

This Rapid Market Assessment (RMA) provides data on market functions, supply, activity, and logistics in 59 earthquake/non-earthquake townships throughout 9 states/regions. Data were collected ***April 21-29*** *through observation and KIIs with 92 retailers. Reports available at* ***www.themimu.info/market-analysis-unit****.*

MARKET ANALYSIS UNIT

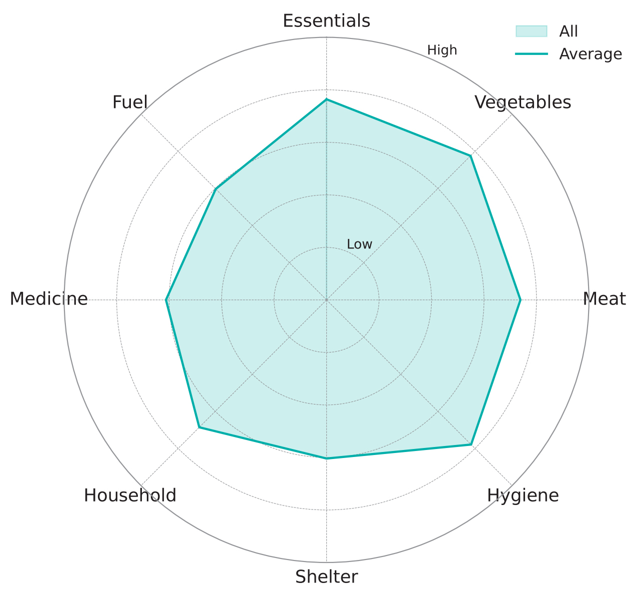
KEY FINDINGS

- **Most markets were open during regular hours**, but one-in-seven experienced periodic short-term closures;
- **Market supply varied by township and state**, but many markets had substantial supply;
- **Fuel, medicine, and shelter NFI supply was poorest**, while vegetable and hygiene NFI supply was most robust;
- **Supply was generally poorer for NFIs than for foods**, yet there were also many markets with poor food supply;
- **Conflict- and earthquake-effects hampered markets**, and in some cases their effects were compounded;
- **Food supply was better in Mandalay than elsewhere**, but retailers said customer activity was slow to rebound;
- **Rakhine retailers reported stable shipping costs**, yet shipping and transportation was a problem elsewhere;
- **Food and NFI supply was overall poorest in Sagaing**, particularly for shelter NFIs, medicines, and fuel.

Overview

At the start of May, conditions varied considerably among retail markets in conflict- and earthquake-affected regions of Myanmar. For example, food supply was more robust in urban Mandalay markets than in many other areas, yet earthquake damage hindered operations, and muted customer activity indicated that households may lack cash to buy necesary goods. Meanwhile in conflict-affected areas of northern Rakhine State, stable shipping costs and market conditions helped improve supply in some areas (although not all). Markets in Kayin State struggled with fuel supply in particular, while markets in southern Sagaing Region struggled to supply a range of goods. Yet common trends were also observable across regions. Most markets continued to operate despite periodic closures or damage, and most continued to supply goods to neighboring villages and townships. Supply was typically poorest for fuel, medicine and shelter-related NFIs, while supply of vegetables and hygiene NFIs was often most robust. In general, supply of foods was deeper than supply of NFIs.

Chart 1. Supply, by Category (Township Avg.)



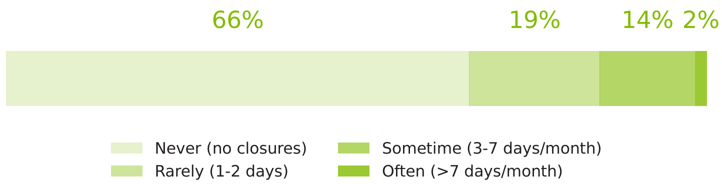
What to Watch

- Earthquake effects will continue to impact supply and demand as households cope with damage;
- Retailers may rebound faster if household **cash** assistance boosts sales/revenue and working capital;
- Supply profiles will shift as monsoon season lifts **hygiene NFI** demand and limits **vegetable** supply;
- Supply in Rakhine, Kayin, Shan and elsewhere may ebb/flow as conflict events impact **shipping** costs.

Market Functionality

Markets were generally open and operational, and three-in-four were described as relatively safe to visit. However, one-in-five markets monitored had recent earthquake or conflict damage, and a similar portion experienced occasional closures (**Chart 2**).

Chart 2. Portion of Markets with Closures (Past 2 weeks)



24% Markets described as "unsafe" or "very unsafe."

22% Markets reporting recent damage.

98% Markets serving nearby villages.

73% Markets serving serving nearby townships.

Supply of Goods

Supply remained relatively good in one-third of the markets monitored, and supply of food continued to be somewhat better than for NFIs (**Chart 1**). The best-supplied markets were often in Mandalay city or high-trade areas of Shan State (**Chart 3**). Supply was generally better in larger markets, but some smaller markets also had decent supply (**Chart 4**). Some of these small-er markets had a decent variety of goods on offer but lacked deep inventory.

Chart 3. Supply of Foods and NFIs

Red denotes Earthquake-prioritized townships (OCHA)

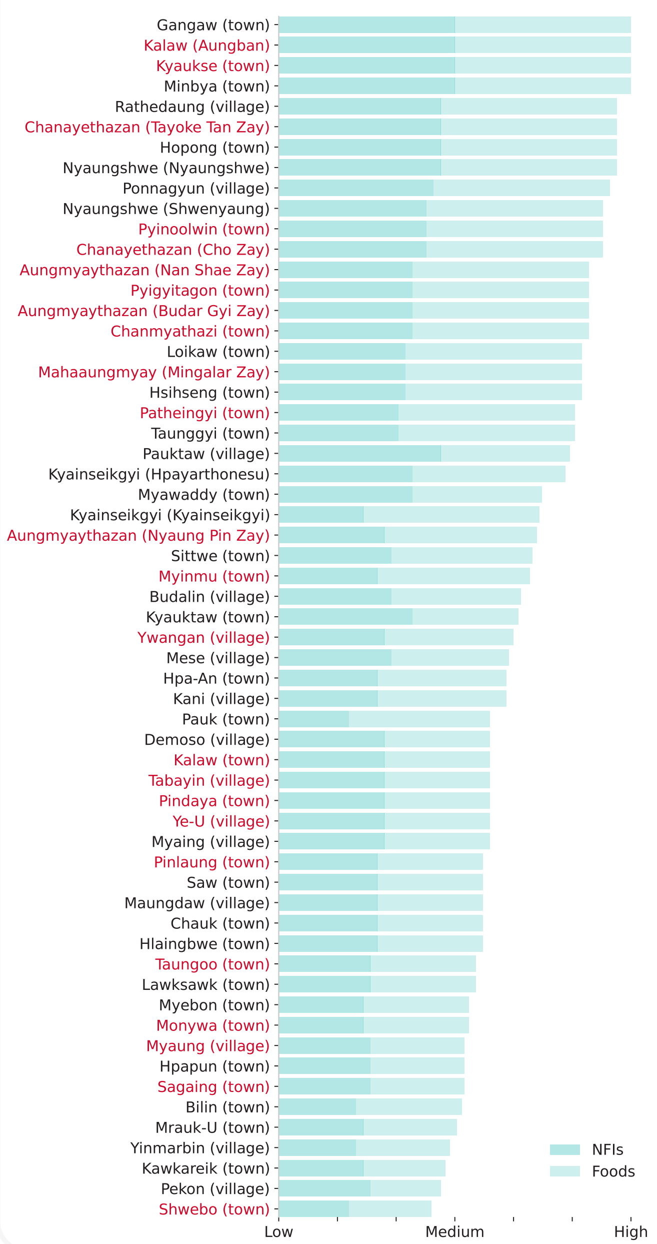
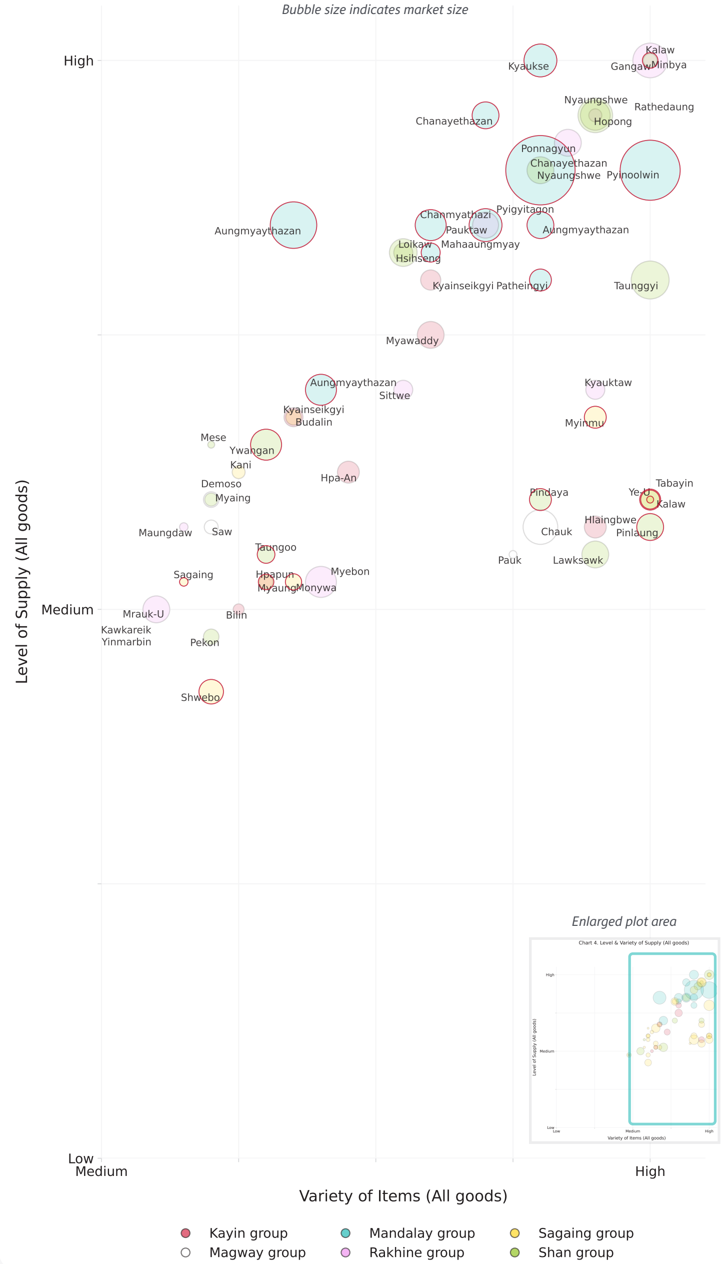
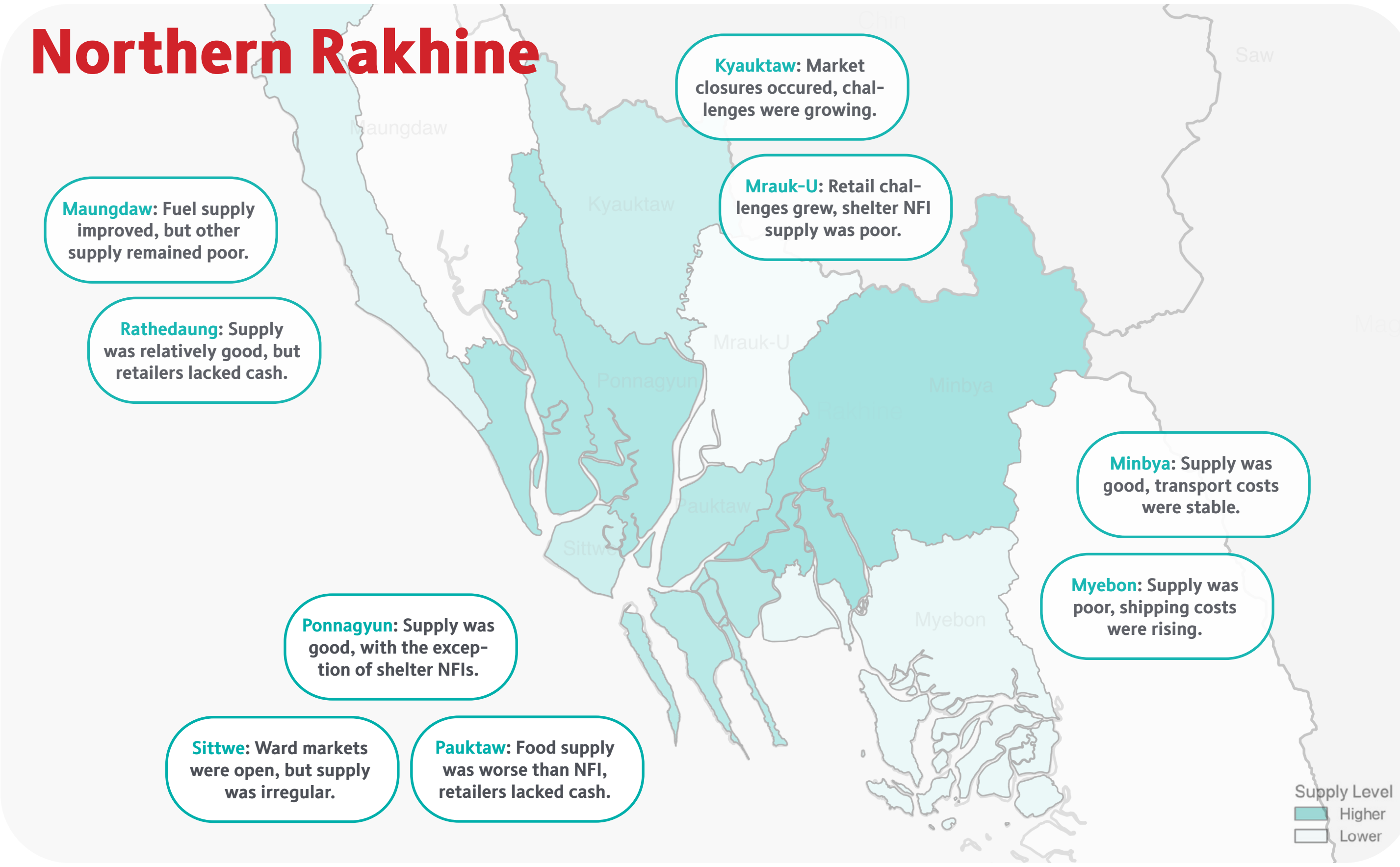


Chart 4. Level & Variety of Supply (All goods)

Bubble size indicates market size



Northern Rakhine



Market Functionality

Market conditions remained generally stable in Northern Rakhine State, with most markets open and functional. Sittwe retail remained curtailed, and Kyauktaw market saw occasional closures, but other markets were open throughout the day. Security remained poor in **Sittwe**, **Ponnagyun**, **Kyauktaw**, and **Mrauk-U**. Most markets monitored remained linked with retailers and customers in surrounding villages and townships, and retailers said shipping costs were fairly stable across the region. Retailers were most concered about poor **cash** access due to weak customer **demand**, while security concerns and damage to inventory or infrastructure were less pressing for them. Other concerns included price volatility for various goods and poor supply of **medicine** in some markets.

Chart 5.1. Operating Hours, by Market

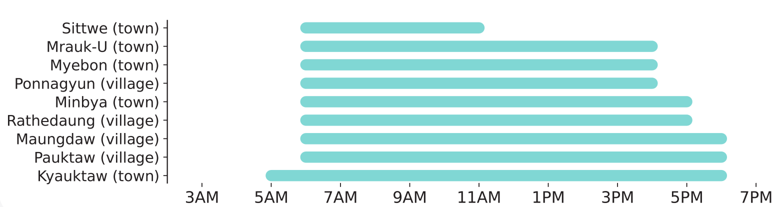
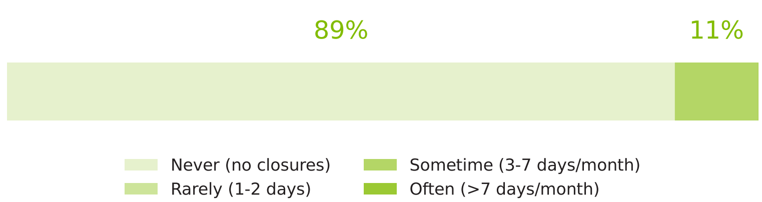


Chart 5.2. Portion of Markets with Closures (Past 2 weeks)



Supply of Goods

Regional supply was variable but better-on-average than some other regions. **Food** supply was moderate, but **meat/fish** was below-average. Decent **fuel** supply echoed reports of stable shipping costs.

Chart 5.3 Food & NFI Supply, by Region

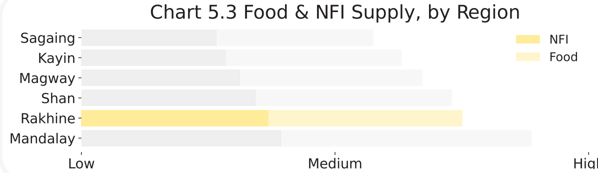
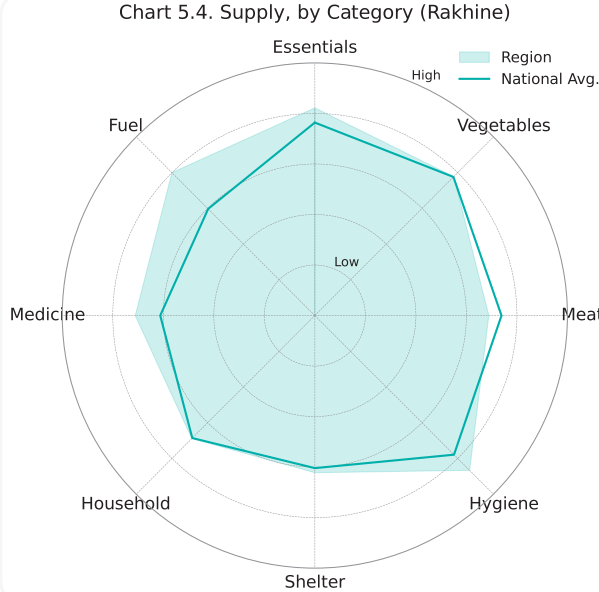
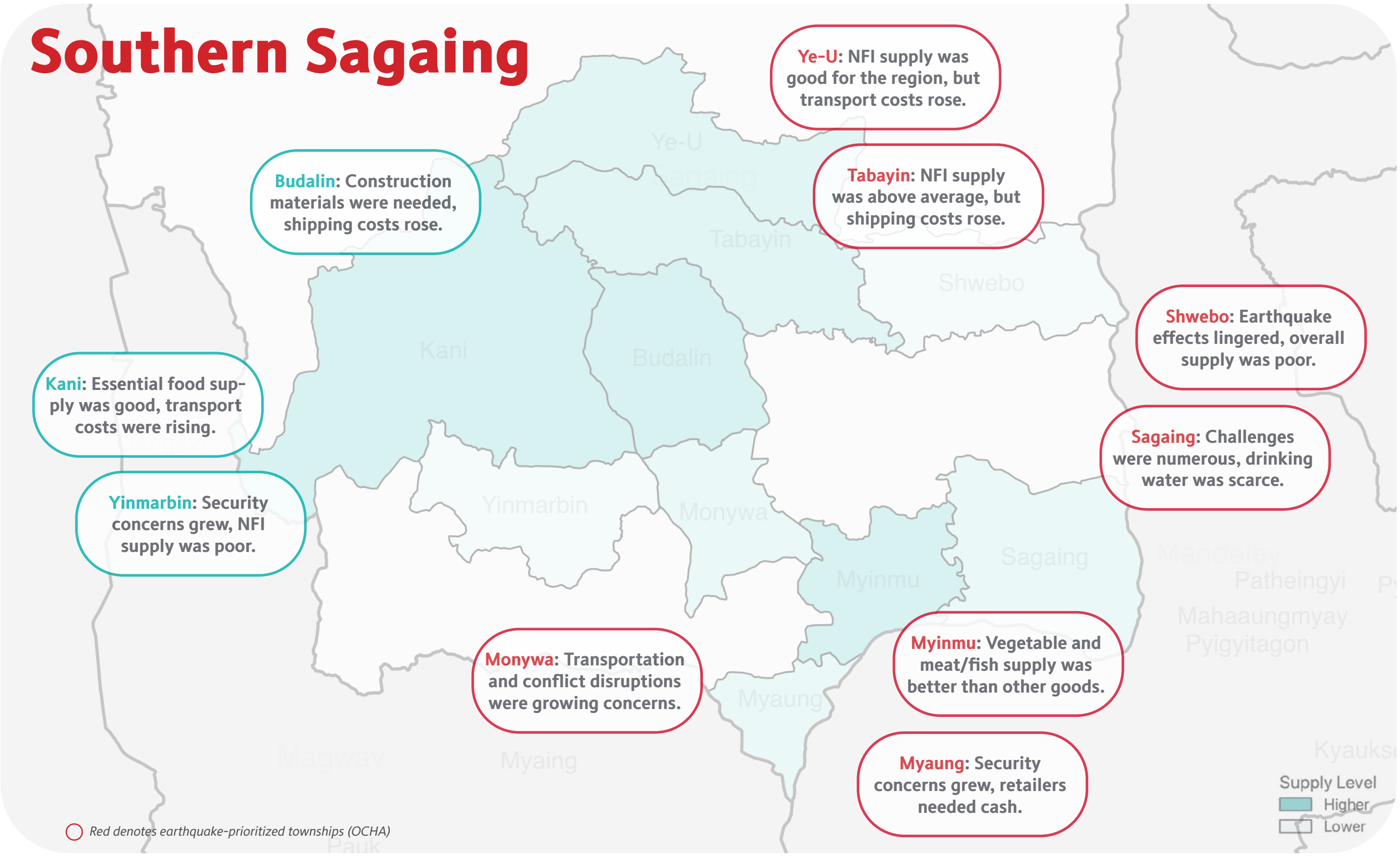


Chart 5.4. Supply, by Category (Rakhine)



Southern Sagaing



Market Functionality

Markets in southern Sagaing Region were generally operational in late-April, especially considering the recent earthquake which impact the eastern half of the region. Most markets kept regular hours, but those in **Shwebo**, **Sagaing**, and **Budalin** experienced closures in recent weeks. **Security** was poor in Myaung and Monywa markets, but markets were otherwise considered safe for customers to visit. Market linkages were weaker-than-usual, as only half of the markets moniter served customers from other townships. Retailers reported a mix of stable or rising **shipping costs**. Retailers faced challenges related to **security** and **transportation**, and **damage** to inventory or infrastructure remained a concern in Shwebo, Sagaing, and Monywa.

Chart 6.1. Operating Hours, by Market

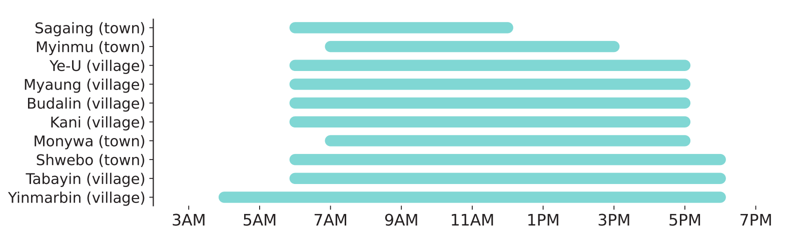
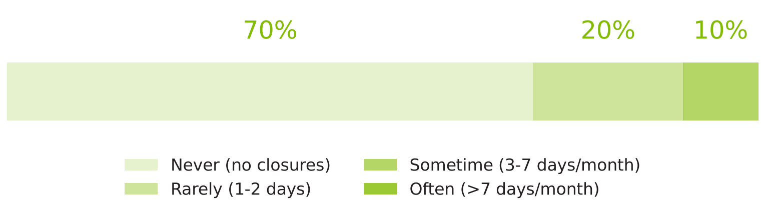


Chart 6.2. Portion of Markets with Closures (Past 2 weeks)



Supply of Goods

Food and NFI supply was significantly poorer than other regions monitored, and **NFI** supply was poorer than food supply. Supply of **shelter** NFIs was particularly poor.

Chart 6.3 Food & NFI Supply, by Region

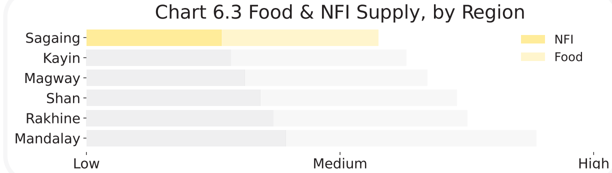
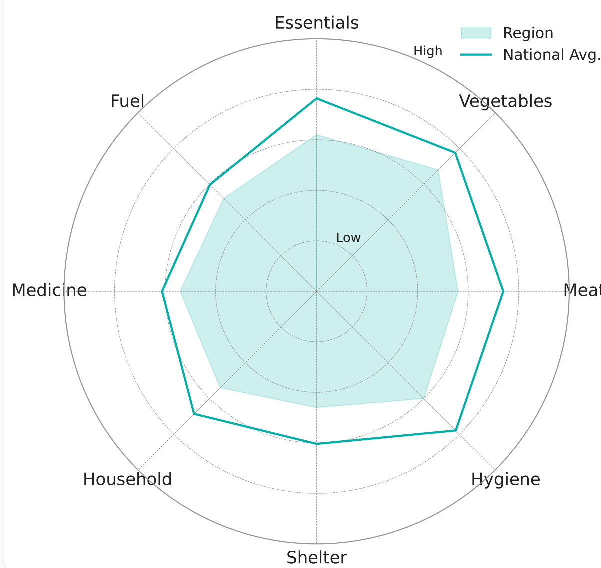
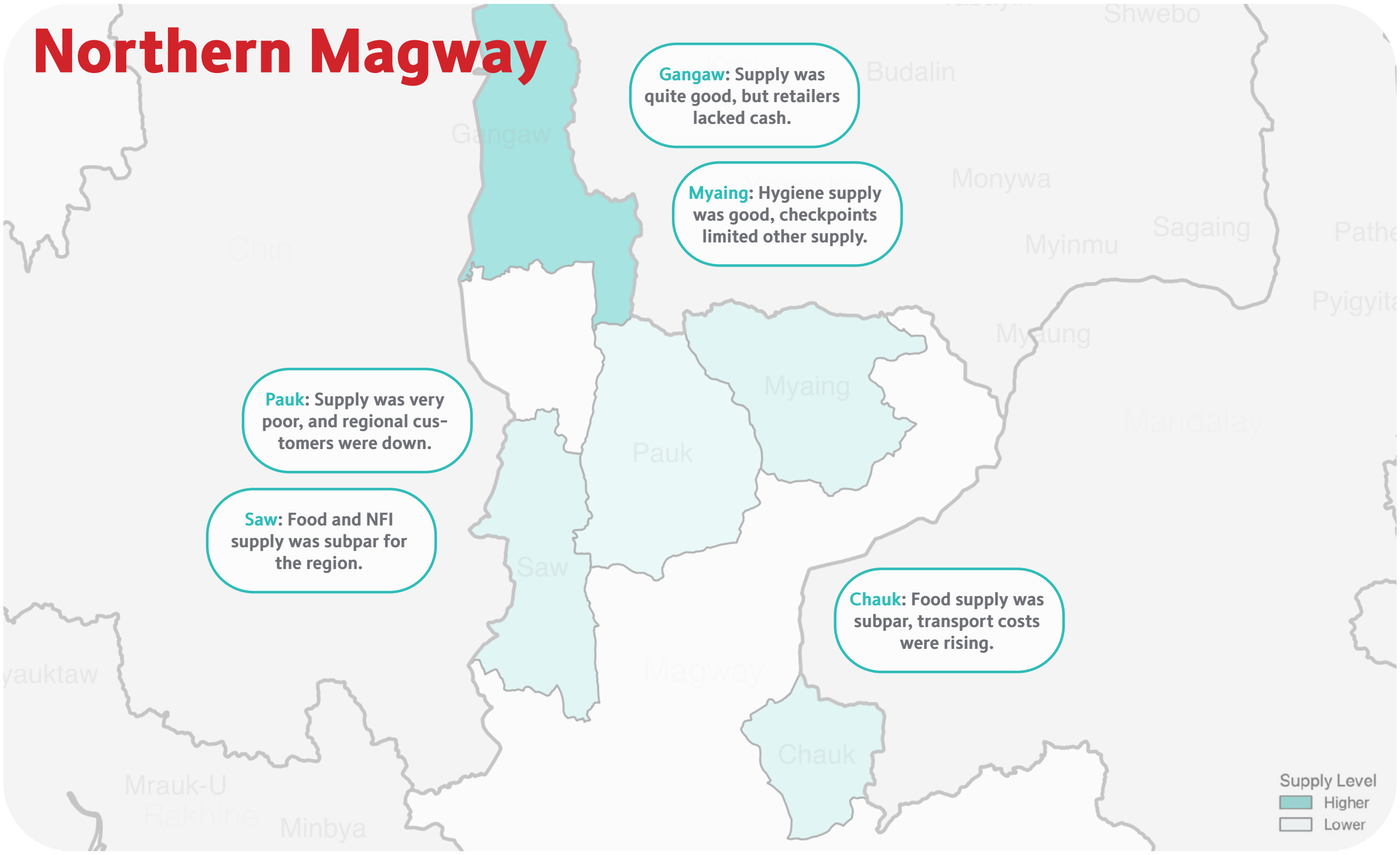


Chart 6.4. Supply, by Category (Sagaing)



Northern Magway



Market Functionality

Markets monitored in northern Magway Region were generally open and operational. That said, security remained poor in/near the **Myaing** and **Chauk** markets, and the Myaing market experienced occasional closures. The markets monitored generally served their surrounding villages and townships, however the Paauk market recieved very few visitors from other townships at the time of monitoring. High **shipping costs**, **transportation** challenges, and poor access to new **supply** were the greatest concerns for retailers. Indeed, retailers reported a mix of stable-or-rising shipping costs. Checkpoints were often cited as a major challenge, however there were few reports of damage to inventory.

Chart 7.1. Operating Hours, by Market

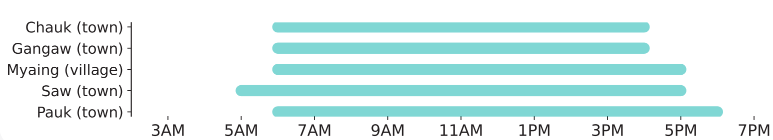
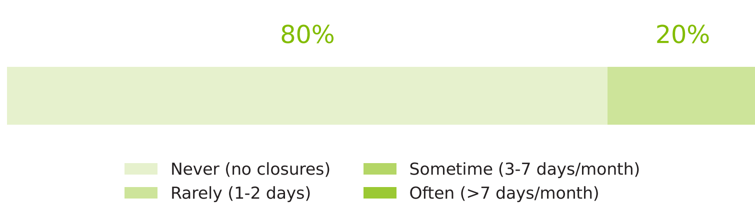


Chart 7.2. Portion of Markets with Closures (Past 2 weeks)



Supply of Goods

Supply in northern Magway was slightly poorer than other regions monitored. Supply of **essential foods** and **household NFIs** was particularly poor. Supply was suprisingly good at the **Gangaw** town market.

Chart 7.3 Food & NFI Supply, by Region

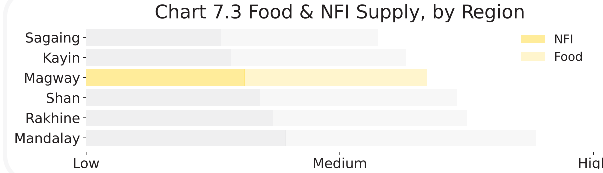
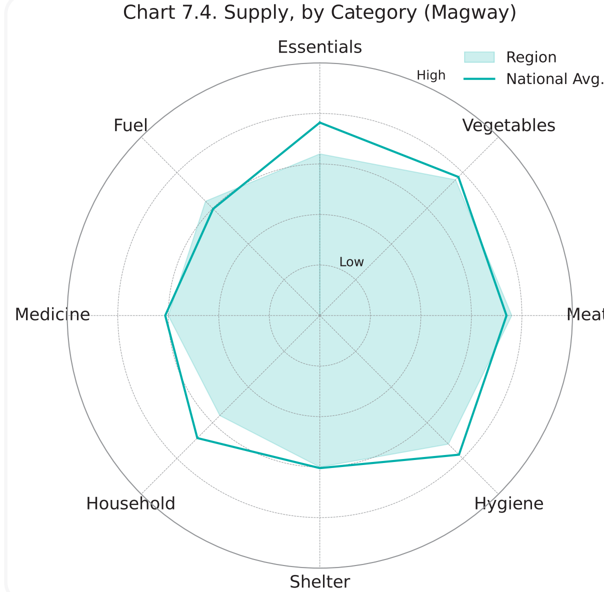
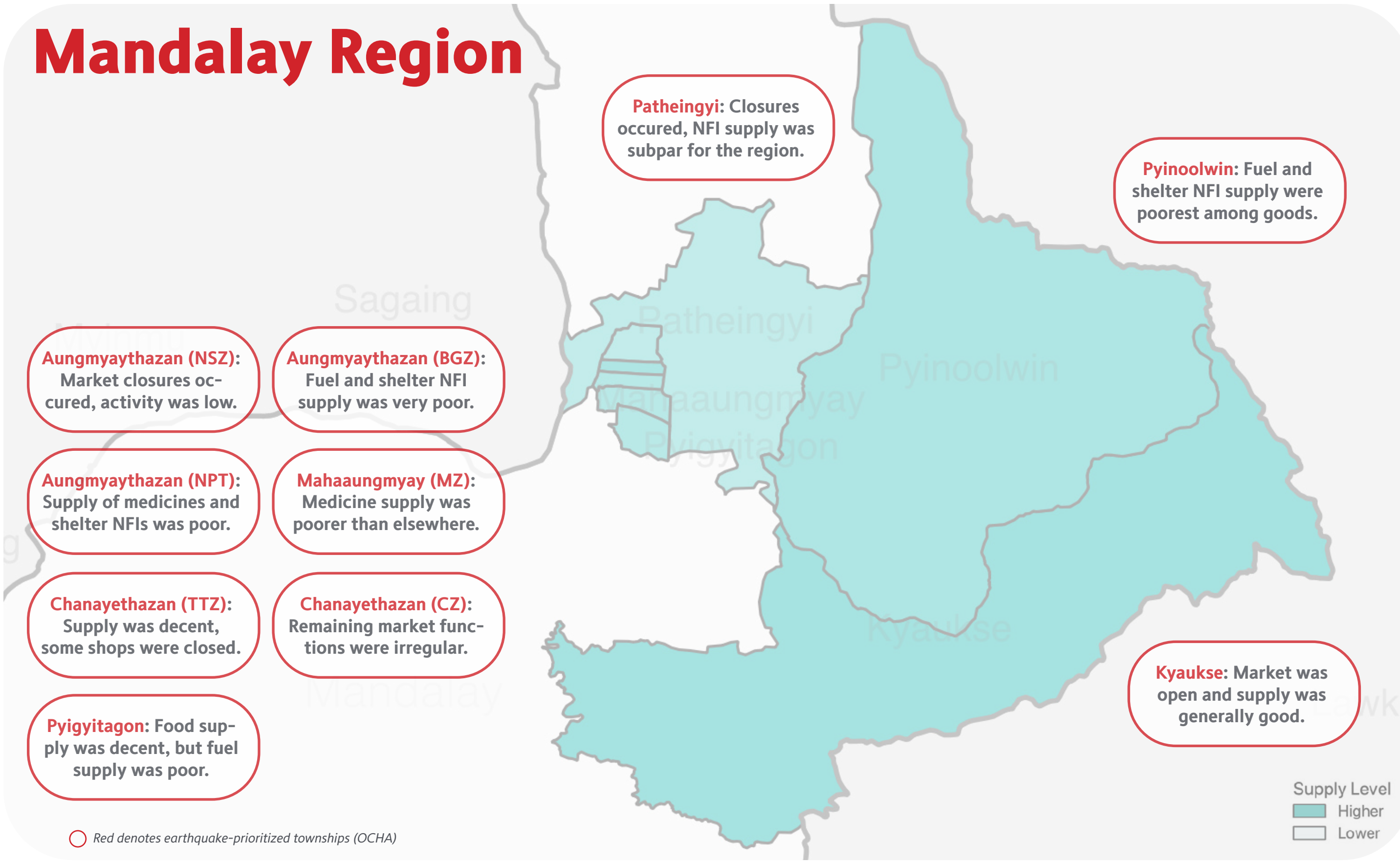


Chart 7.4. Supply, by Category (Magway)



Mandalay Region



Market Functionality

Markets were operational in Mandalay Region several weeks after the recent earthquake, but retailers reported very weak demand and numerous lingering operational challenges. Markets were open and generally-safe to visit (Zay Cho being an exception), yet many reported recent **closures** and/or reduced **hours**. Most markets continued to receive customers from surrounding villages or townships, but retailers said customer traffic and sales remained muted since the earthquake. Indeed, retailers' greatest concern was weak **demand**—and in some cases food spoilage resulting from lack of inventory turnover—as well as the resulting reduction in working capital.

Chart 8.1. Operating Hours, by Market

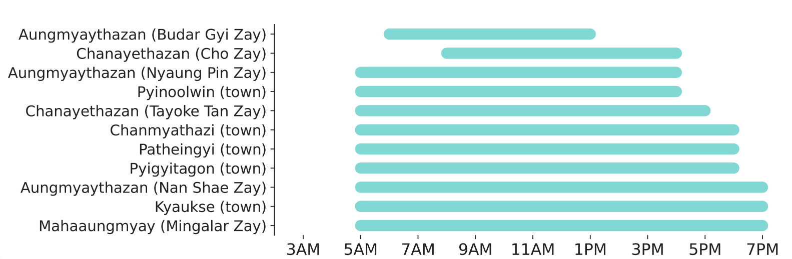
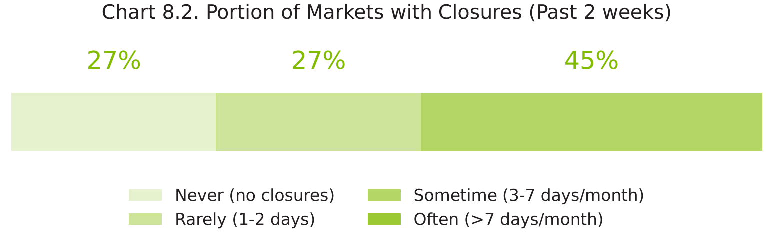


Chart 8.2. Portion of Markets with Closures (Past 2 weeks)



Supply of Goods

Supply in the high-trade urban areas of Mandalay was good relative to other more conflict-affected regions monitored, particularly for **foods**. Supply of **fuel** and **shelter NFIs** was mediocre.

Chart 8.3 Food & NFI Supply, by Region

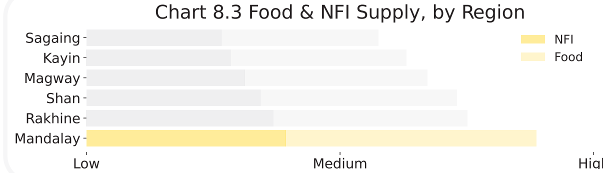
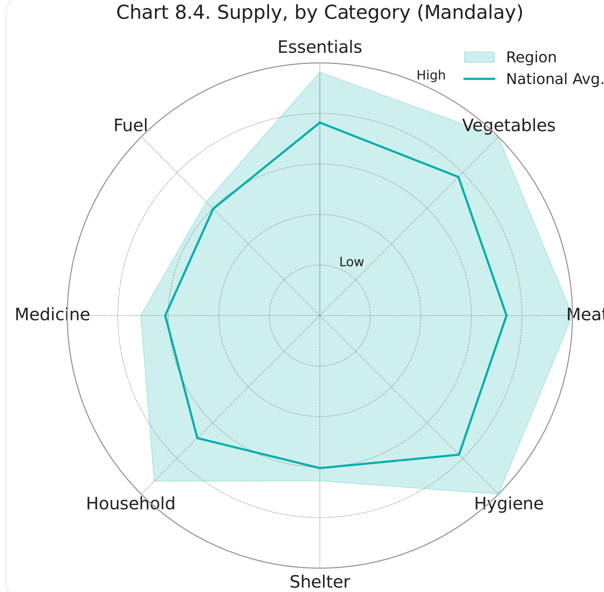
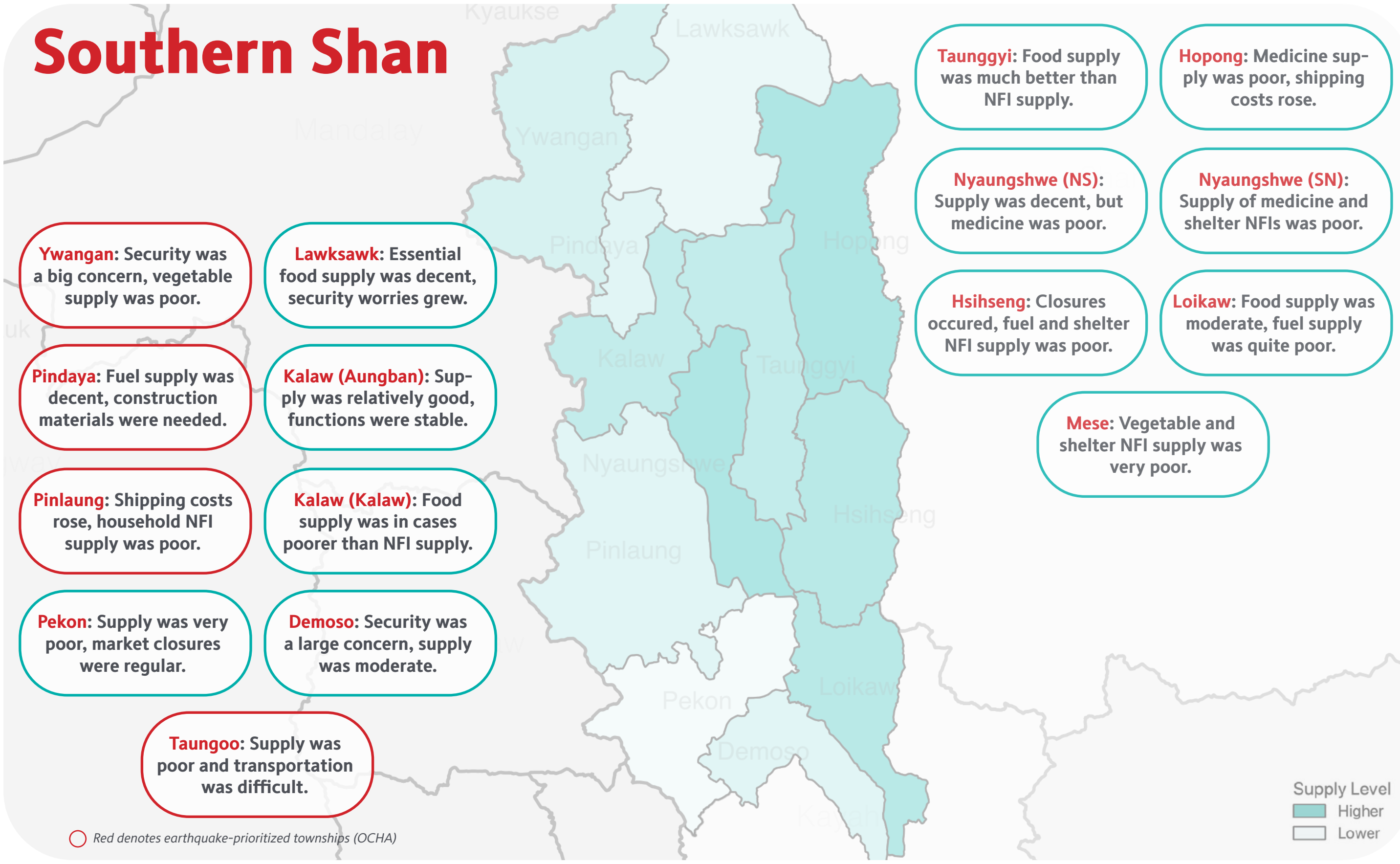


Chart 8.4. Supply, by Category (Mandalay)



Southern Shan



Market Functionality

Markets monitored in southern Shan State—including some in earthquake-affected areas—remained open and operational, and closures were rare. Markets in **Pekon** and **Demoso** were relatively unsafe due to conflict events, while those in **Pindaya** and **Ywangan** were also considered somewhat unsafe. Markets continued to receive customers from other villages and townships, but rising **transportation** costs were a major concern for retailers.

Chart 9.1. Operating Hours, by Market

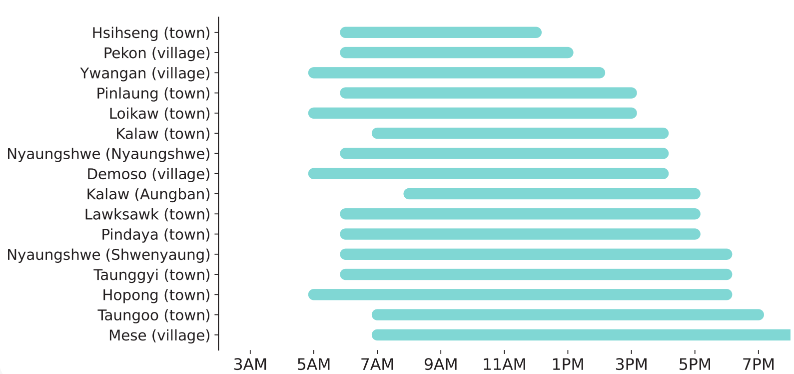
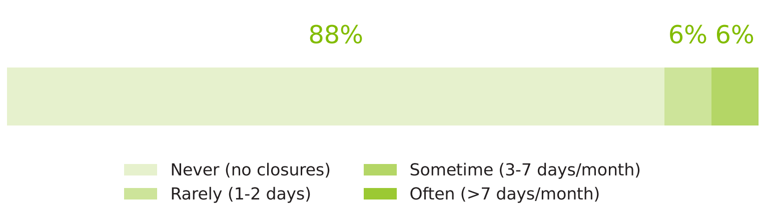


Chart 9.2. Portion of Markets with Closures (Past 2 weeks)



Supply of Goods

Overall supply was moderate in southern Shan State, but it varied with conflict- and earthquake-effects. Supply of **household** and **shelter NFIs** was poor in the more western earthquake-affected areas.

Chart 9.3 Food & NFI Supply, by Region

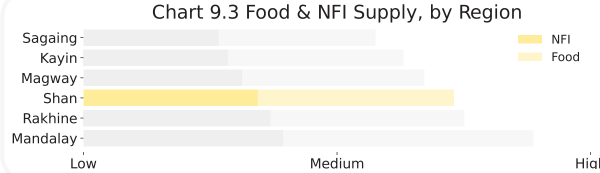
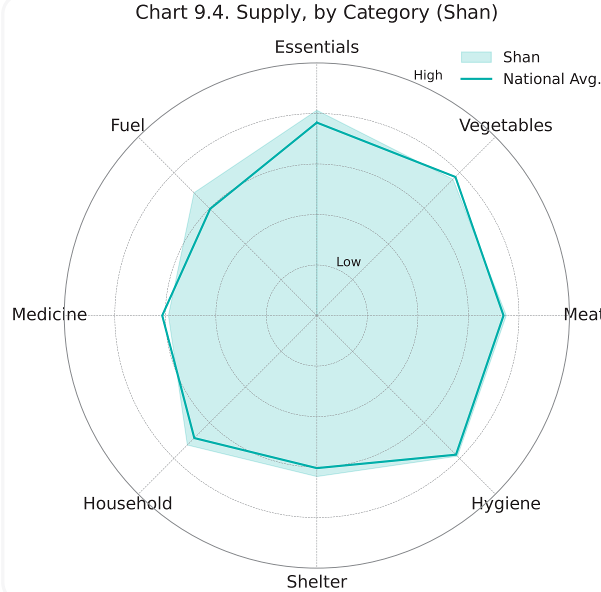
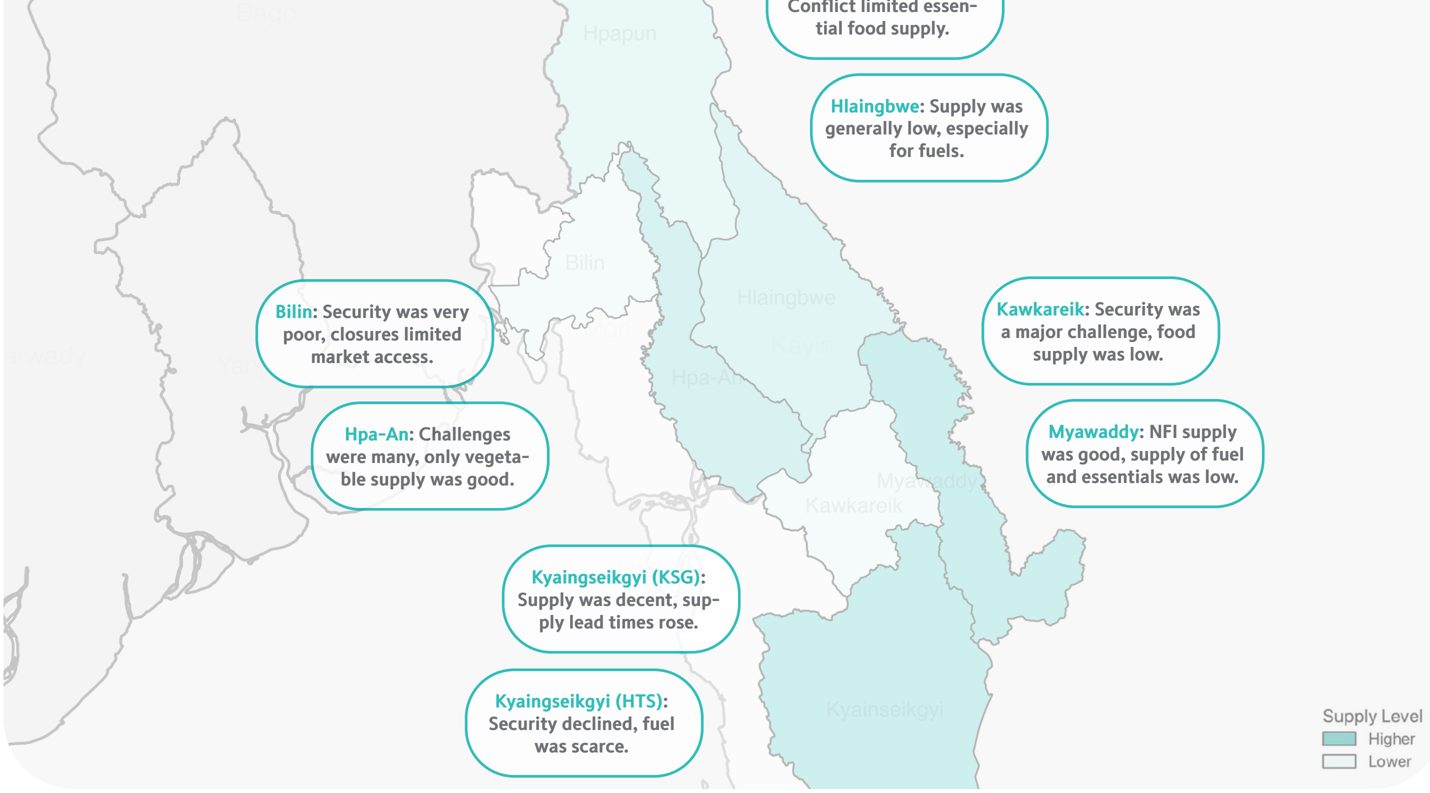


Chart 9.4. Supply, by Category (Shan)



Kayin State



Market Functionality

Markets in Kayin State were open and operational, but they were hampered by periodic closures and shipping bottlenecks. More than half of the markets monitored were affected by occasional closures in recent weeks due to conflict-related events. **Kawkareik** market saw frequent closures and observers described it as still unsafe. Besides Kawkareik, all other markets monitored were reported to be generally-safe for visitors. Markets in Kawkareik and Hlaingbwe saw few customers from neighboring townships, but all markets continued to serve their surrounding villages. Retailers said **shipping costs** were rising, possibly due in part to reports of poor fuel supply. Indeed, poor **transportation** was by far the challenge most commonly reported by retailers, followed by the inability to access new **supply**.

Chart 10.1. Operating Hours, by Market

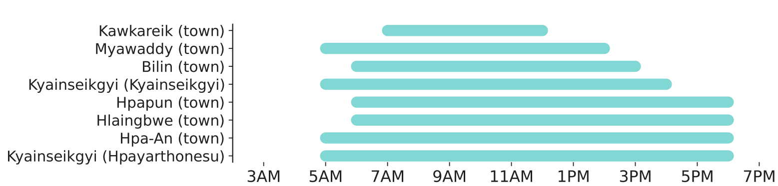
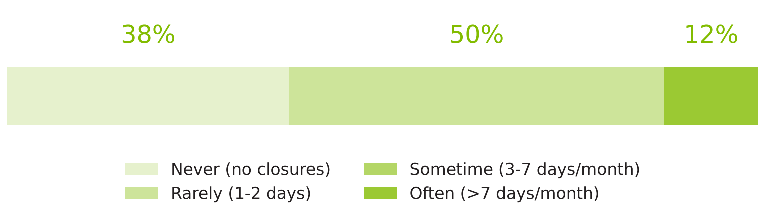


Chart 10.2. Portion of Markets with Closures (Past 2 weeks)



Supply of Goods

Food and NFI supply was poorer than in other regions monitored, and **fuel** supply was very poor. **Meat/fish**, **vegetables**, and **essential food** supply were all below-average.

Chart 10.3 Food & NFI Supply, by Region

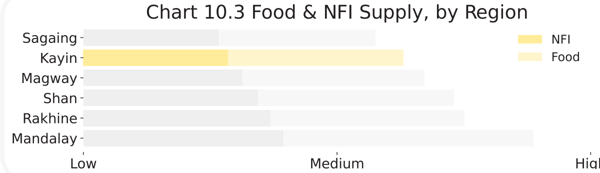
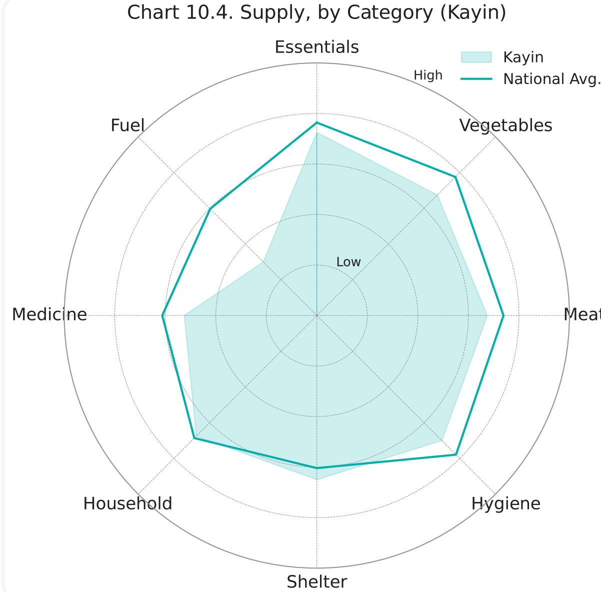


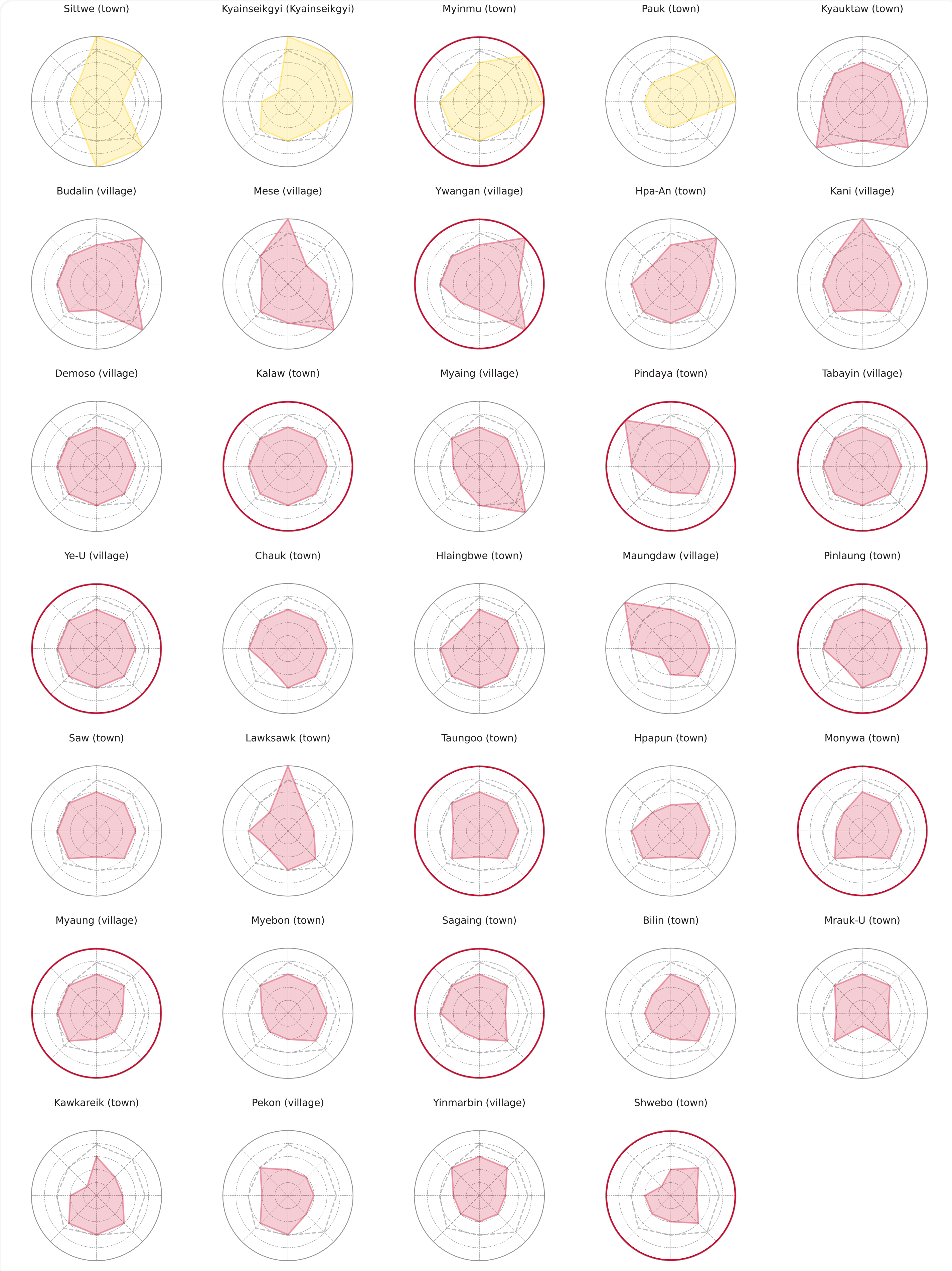
Chart 10.4. Supply, by Category (Kayin)



Township Supply

The following charts depict the level of supply of eight product categories in each market monitored, with earthquake-affected townships marked by a **red** outline. A simple cluster analysis classified each market into one of four groups based on the volume and nature of their supply. The groups and their distinct profiles include:

- **Group A** - Markets with good overall supply, although some were low in **fuel**, **medicine**, or **shelter** NFIs. Most were in high-trade areas of southern Shan State;
- **Group B** - Markets with fairly-robust food supply but which lacked supply of various **NFIs**. They largely consist of markets in Mandalay city;
- **Group D** - Markets with below-average overall supply, but which were well-supplied in some isolated categories of foods or NFIs. They are regionally diverse;
- **Group C** - A large number of markets with below-average overall supply. Some were well-stocked in one product category but all had poor supply of many goods.


Sittwe (town)
Kyainseikgyi (Kyainseikgyi)
Myinmu (town)
Pauk (town)
Kyauktaw (town)
Budalin (village)
Mese (village)
Ywangan (village)
Hpa-An (town)
Kani (village)
Demoso (village)
Kalaw (town)
Myaing (village)
Pindaya (town)
Tabayin (village)
Ye-U (village)
Chauk (town)
Hlaingbwe (town)
Maungdaw (village)
Pinlaung (town)
Saw (town)
Lawksawk (town)
Taungoo (town)
Hpapun (town)
Monywa (town)
Myaung (village)
Myebon (town)
Sagaing (town)
Bilin (town)
Mrauk-U (town)
Kawkareik (town)
Pekon (village)
Yinmarbin (village)
Shwebo (town)

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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