

# Rapid Market Assessment

This Rapid Market Assessment (RMA) provides data on market function, supply, activity, and logistics in 57 earthquake/non-earthquake townships across 9 states/regions. Data were collected May 21–31 through observation and KIIs with 112 retailers. Reports available at [www.themimu.info/market-analysis-unit](http://www.themimu.info/market-analysis-unit).

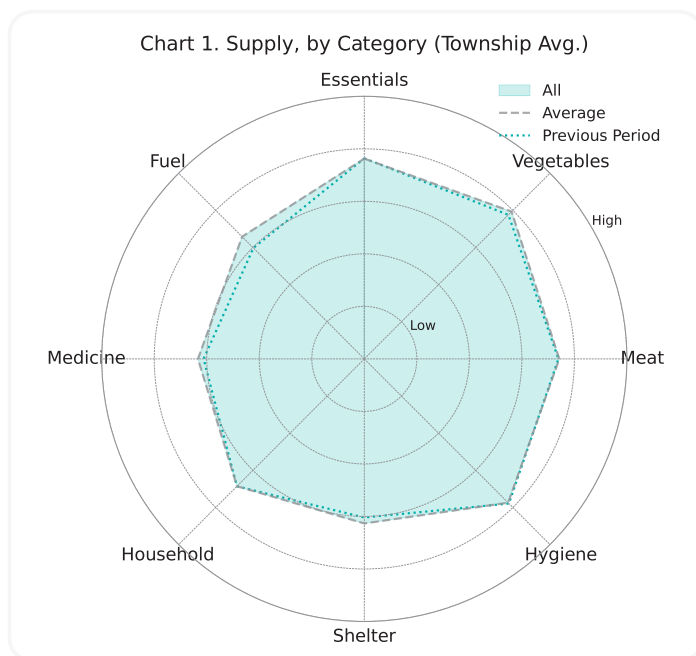


## KEY FINDINGS

- **Many markets were functional without interruption**, and linkages with neighboring markets were often intact;
- **Supply was relatively good in many markets**, and May saw small gains in fuel, medicine and vegetable supply;
- **Poor security and supply still afflicted many markets**, especially in high-conflict areas like Kawkaireik and Pekon;
- **NFI supply remained less reliable than food supply**, and it was weakest for medicine and shelter NFIs;
- **Supply was best in Mandalay**, although it declined slightly and retailers still struggled with earthquake damage;
- **Rakhine State saw the biggest decline in supply in May** as vegetable and shelter NFI supply dipped;
- **Supply was overall poorest in Sagaing Region**, where it was particularly poor for foods;
- **Transportation drove many retail challenges in May**, like restrictions on goods and poor security in shipment.

## Overview

Many markets remained largely functional in May, despite ongoing conflict and lingering damage to roads and buildings following the earthquake. Market closures were less common in May than in April, and goods continued to flow between towns and villages. Yet the supply of goods remained difficult in many areas, and a key driver was persistent transportation challenges. Retailers reported rising shipping costs in Mandalay and Shan State, they cited restrictions on the movement of goods in Sagaing Region, and in nearly all regions they noted safety concerns during shipment. Supply worsened in Rakhine State in particular, where vegetable and shelter NFI supply fell. Supply also declined in Mandalay, where retailers still struggled with earthquake damage. Supply of medicine and shelter NFIs remained poor in many markets, and food supply was particularly poor in areas of Sagaing Region. While supply has yet to drop off sharply, it is not unlikely that it will grow increasingly difficult to adequately restock hygiene NFIs, vegetables and shelter NFIs in the coming months.



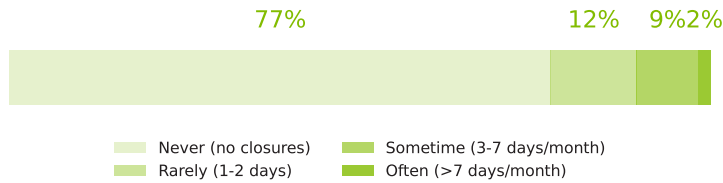
## What to Watch

- Monsoon rains will likely increase **transportation** challenges and limit **supply** in the months ahead;
- Natural disasters related to flooding and landslides are likely to cause periodic supply disruptions;
- Global events will likely impact **petrol** prices and in turn transportation and supply nationwide;
- Supply and market functionality will remain impacted by the **earthquake** and **conflict** in certain areas.

## Market Functionality

There were fewer market closures in May than in April. Seventy-seven percent of markets monitored in May reported no recent closures, compared to 66% in April (**Chart 2**). Moreover, most markets continued to serve neighboring villages and townships.

Chart 2. Portion of Markets with Closures (All)



**21%** Markets described as "unsafe" or "very unsafe."  
**18%** Markets reporting recent damage.  
**95%** Markets serving nearby villages.  
**75%** Markets serving serving nearby townships.

## Supply of Goods

Food and NFI supply varied across the 57 markets monitored in May, and the earthquake, conflict, and weather were all key drivers. Mandalay Region and Southern Shan State again had a larger share of markets with robust supply, while other states/regions had a mix of high- and low-supply markets. (**Chart 3**). Markets with relatively low inventory nonetheless still had moderate-or-good variety of goods on hand, but there were exceptions like Kawakareik, Yinmarbin, and Sagaing (**Chart 4**).

Chart 3. Supply of Foods and NFIs

Red denotes Earthquake-prioritized townships (OCHA)

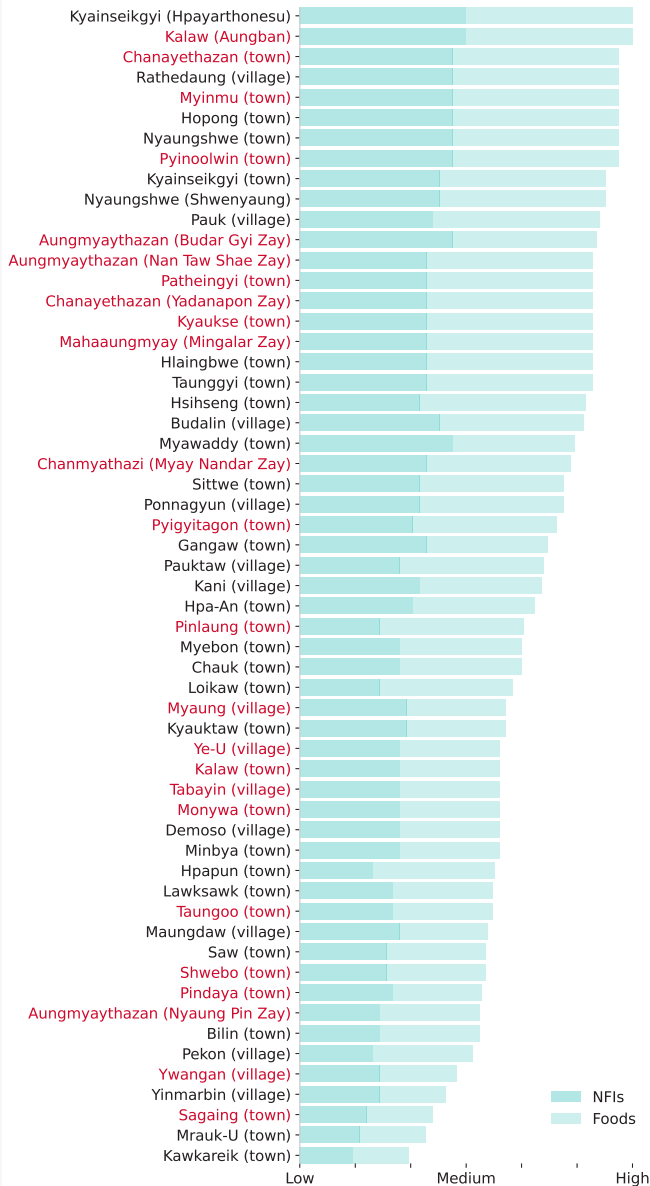
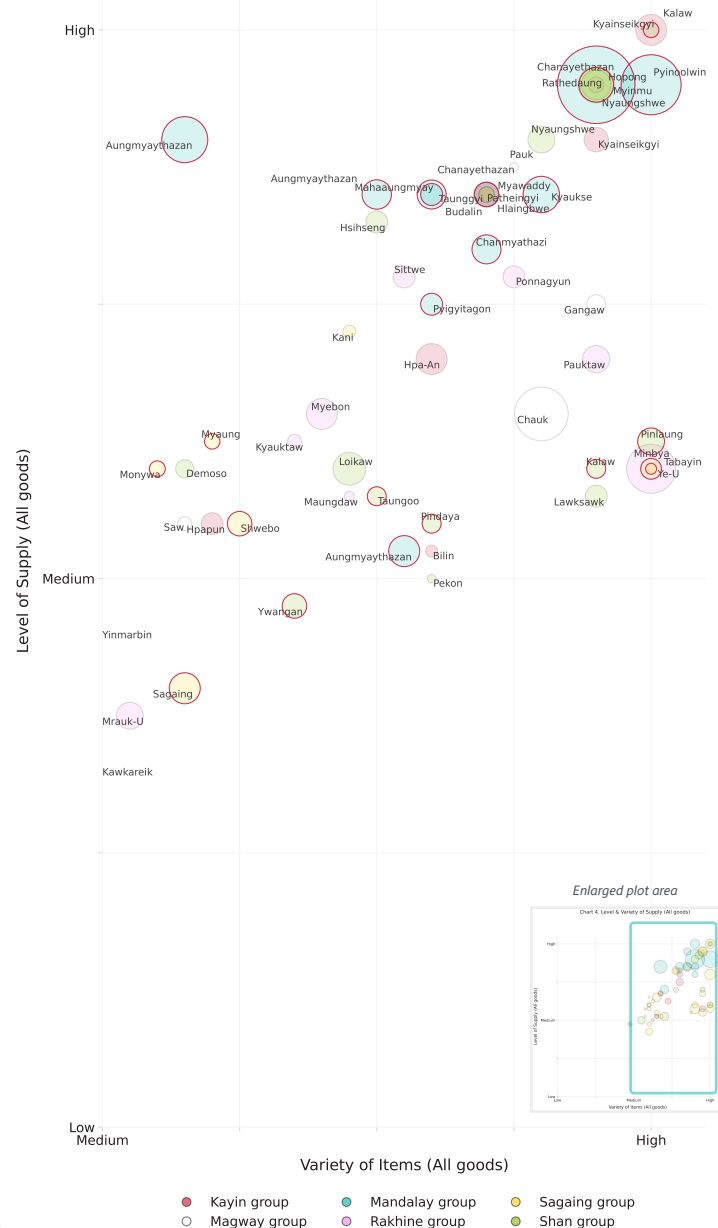
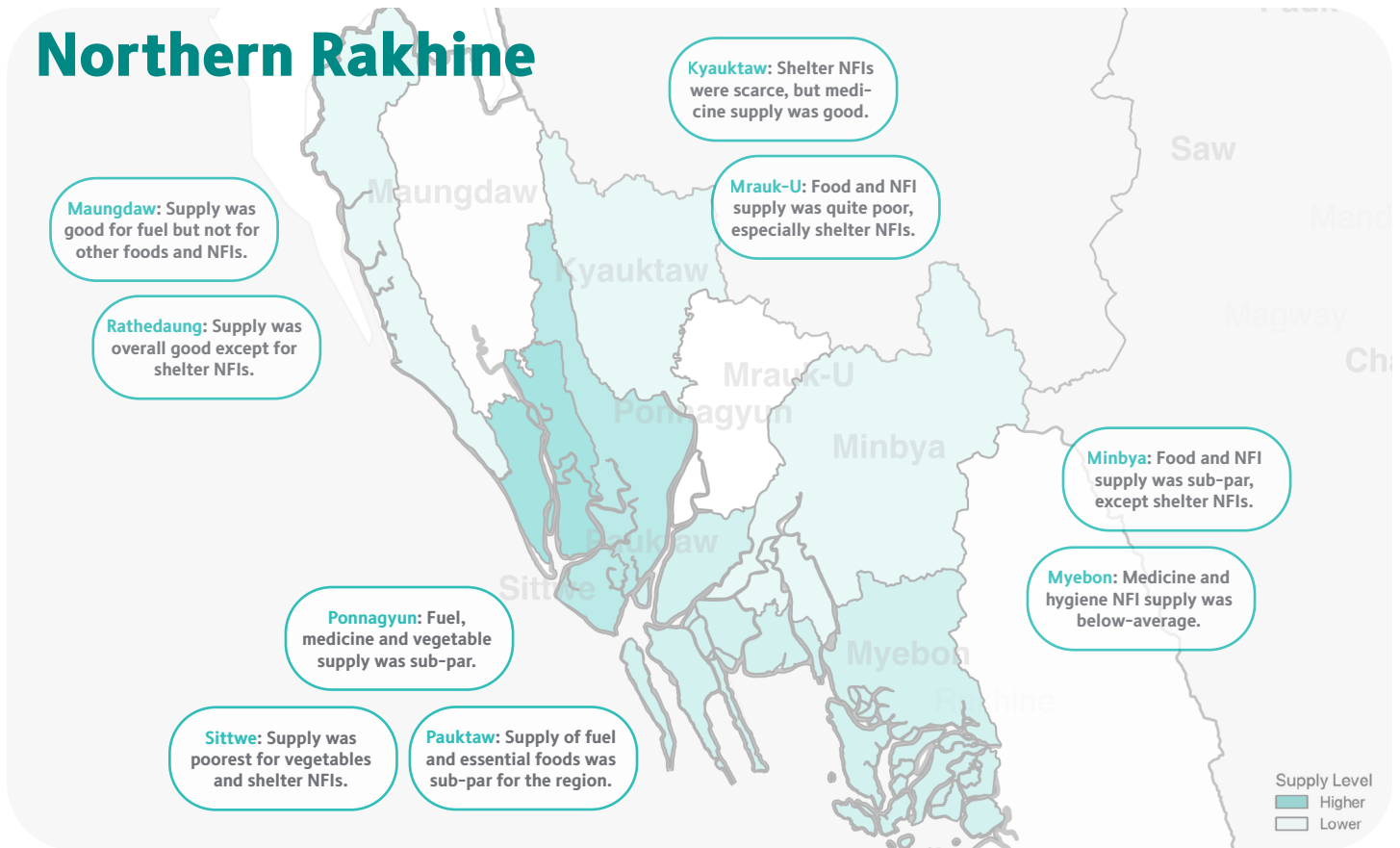


Chart 4. Level & Variety of Supply (All goods)

Bubble size indicates market size



# Northern Rakhine



## Market Functionality

Markets were functional in May, but security concerns remained prominent. Market closures were rare, but some markets observed shorter market hours. **Safety** was the most widely-reported challenge among retailers, and observers said security remained poor near **Kyauktaw**, **Mrauk-U**, **Maungdaw**, and **Sittwe** markets. Retailers said transportation costs remained stable, and transportation challenges were less common among Rakhine retailers than elsewhere. Yet some retailers also reported growing shipping **lead-times** as monsoon rains began. As the lean season took hold in Rakhine State poor **cash access** from lower retail sales was the challenge most often cited by retailers. Retailers in Kyauktaw, Mrauk-U and Myebon cited more challenges than other retailers, while retailers in Minbya cited the fewest.

Chart 5.1. Operating Hours, by Market

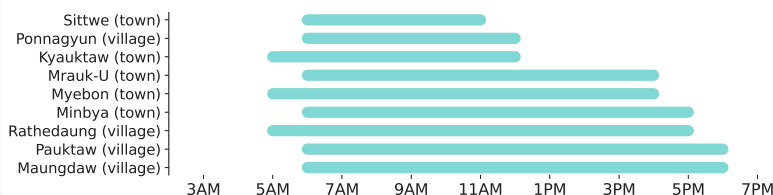
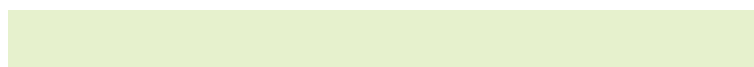


Chart 5.2. Portion of Markets with Closures (Rakhine)

100%



Never (no closures)    Sometime (3-7 days/month)  
 Rarely (1-2 days)    Often (>7 days/month)

## Supply of Goods

Food and NFI supply worsened in May. **Vegetable** supply declined, as did **hygiene** and **shelter** NFI supply. On the other hand, fuel and medicine supply remained above-average.

Chart 5.3 Food & NFI Supply, by Region

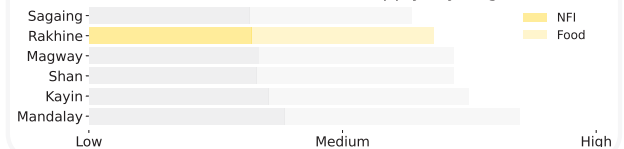
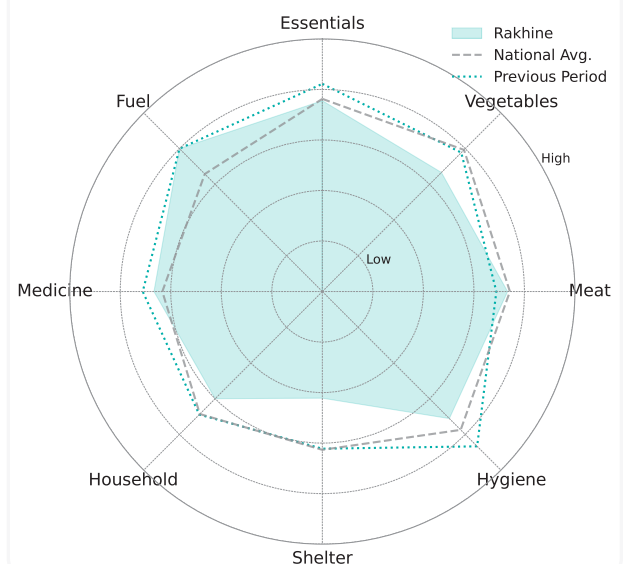
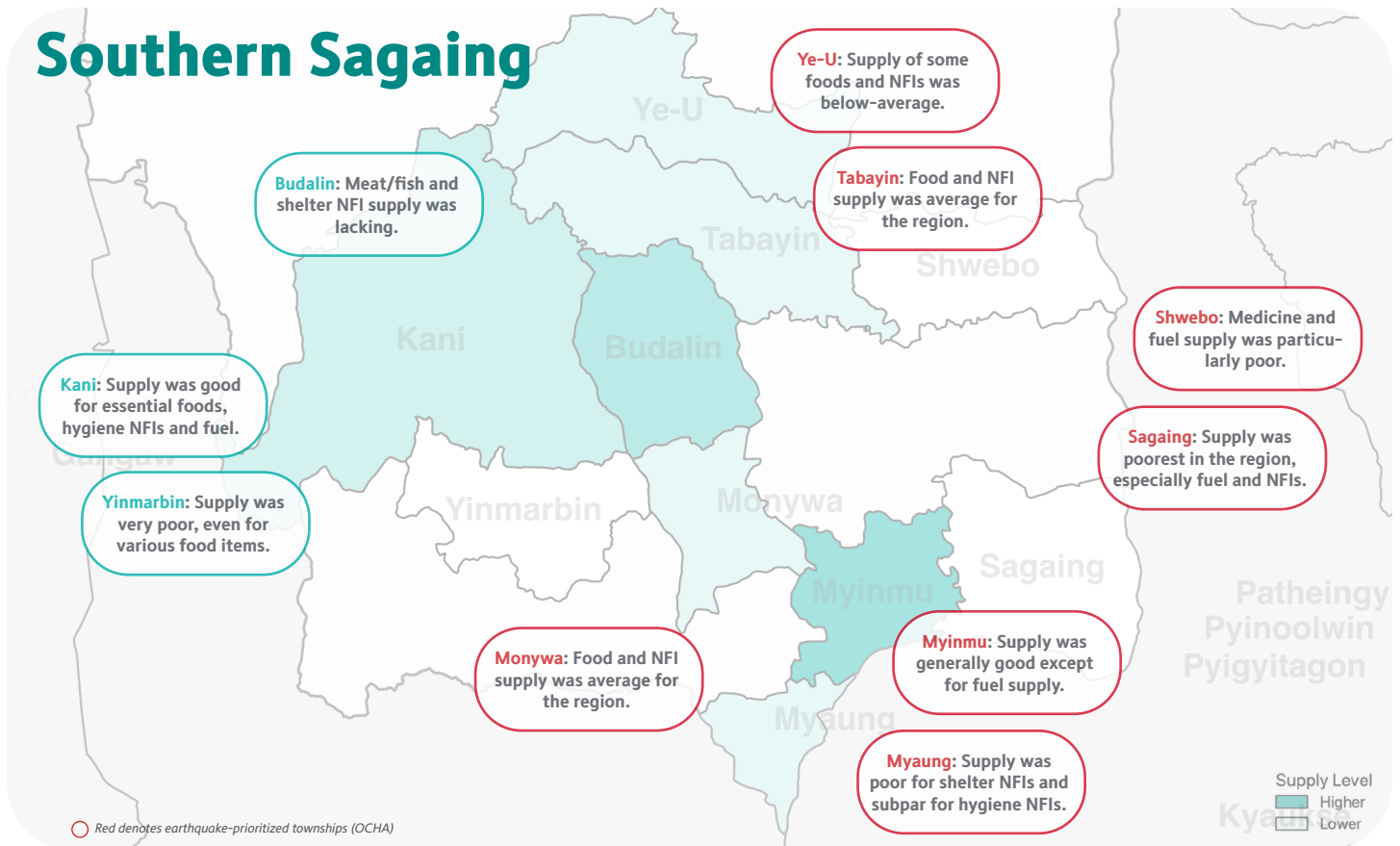


Chart 5.4. Supply, by Category (Rakhine)



# Southern Sagaing



## Market Functionality

Markets were operational in Southern Sagaing Region, but poor security limited transportation and affected supply. Security in/near markets was relatively good, but it was poorer around town markets. Closures affected **Ye-U** and **Shwebo** markets. With the exception of Myaung, Kani and Budalin, most markets regularly served customers from neighboring villages. **Transportation** was the challenge most-cited by retailers. Most retailers said their own shipping costs were stable, but checkpoints, road-closures and poor **security** increased **lead-times** and limited access to goods like medicine. Some retailers also still struggled with lingering earthquake **damage**. **Fuel** shortages remained troubling for some retailers.

## Supply of Goods

Supply improved in Sagaing, yet it remained poor relative to other regions. **Food** supply remained particularly poor, although fuel and medicines supply was not far below other regions.

Chart 6.3 Food & NFI Supply, by Region

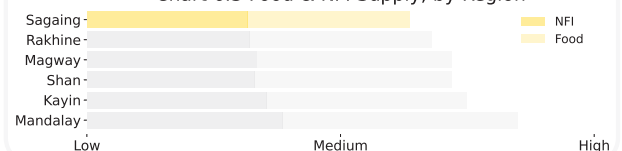


Chart 6.1. Operating Hours, by Market

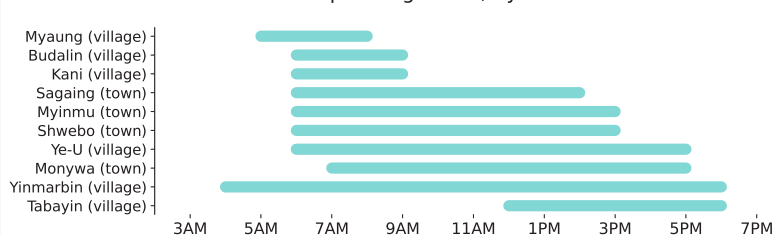


Chart 6.2. Portion of Markets with Closures (Sagaing)

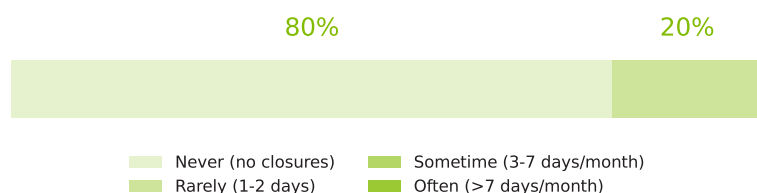
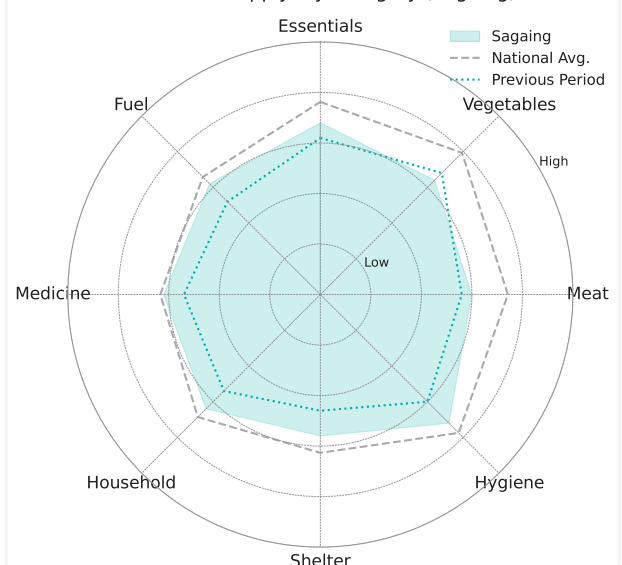
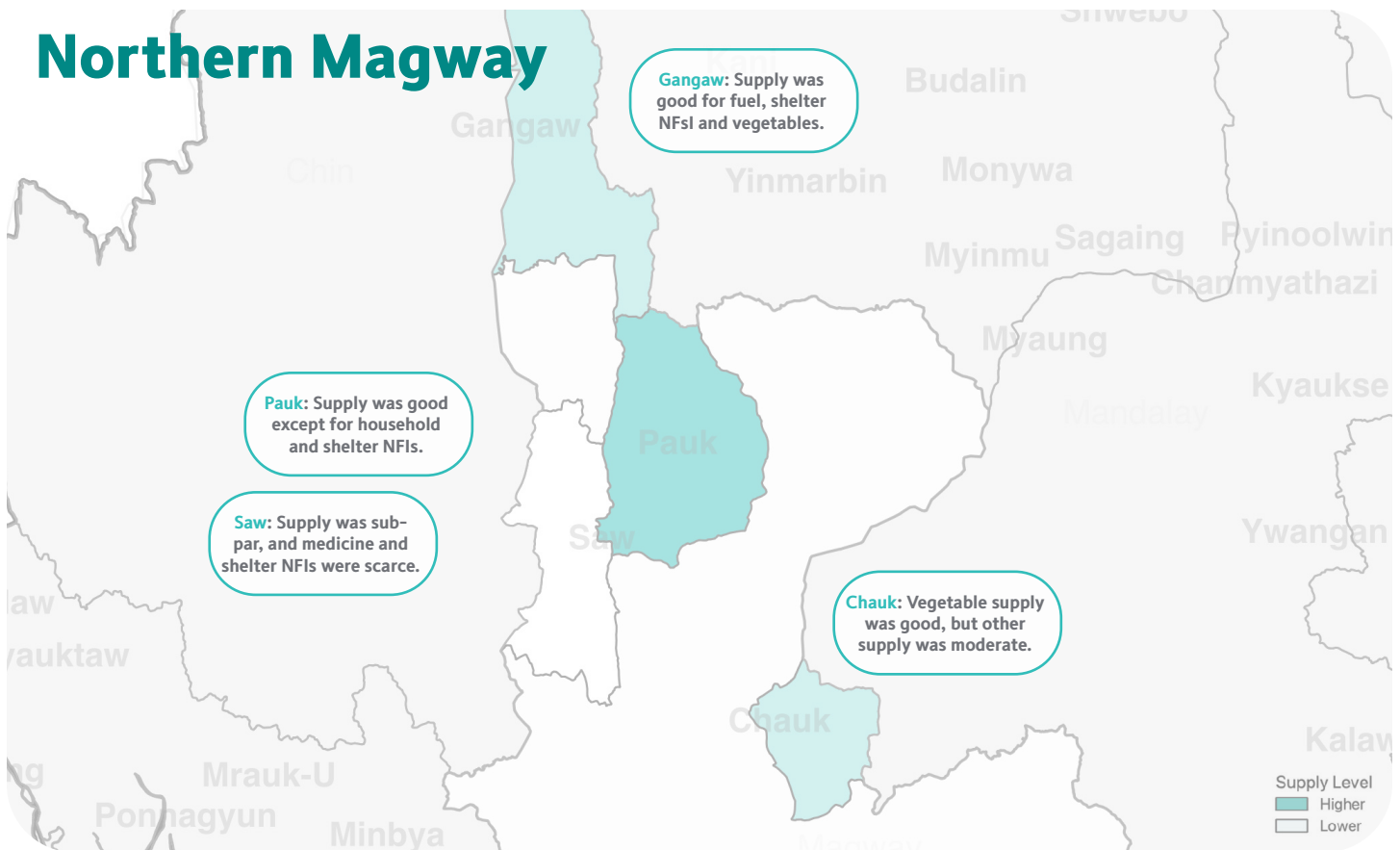


Chart 6.4. Supply, by Category (Sagaing)



# Northern Magway



## Market Functionality

The four markets monitored in Northern Magway Region were functional without interruption in May, but increasing conflict prevented data collection in Myaing Township where supply was quite poor in April. There were no reported closures in the markets monitored, but **security** was relatively poor in/near the market in **Chauk**. All of the markets monitored continued to supply goods to customers from neighboring villages, and all except for the Pauk village market received regular customers from neighboring townships. Retailers reported rising **shipping costs**, despite reports of decent fuel supply in their localities. Poor **transportation** and limited **cash** for buying inventory were the most common challenges cited by retailers in May. Retailers in **Gangaw**—where supply declined—reported more challenges than retailers elsewhere.

## Supply of Goods

Food and NFI supply was fairly stable in Magway, and it was not far off the broader average for all regions. Supply was best for vegetables and fuel, while it was poorest for **shelter** and **household** NFIs.

Chart 7.3 Food & NFI Supply, by Region

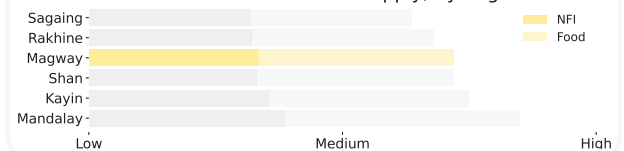


Chart 7.4. Supply, by Category (Magway)

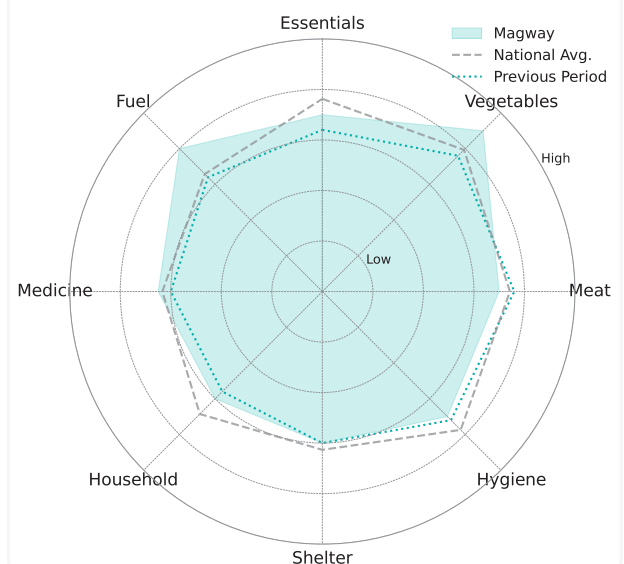


Chart 7.1. Operating Hours, by Market

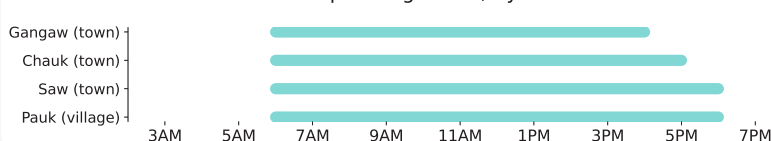
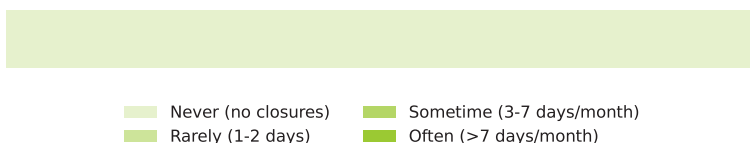


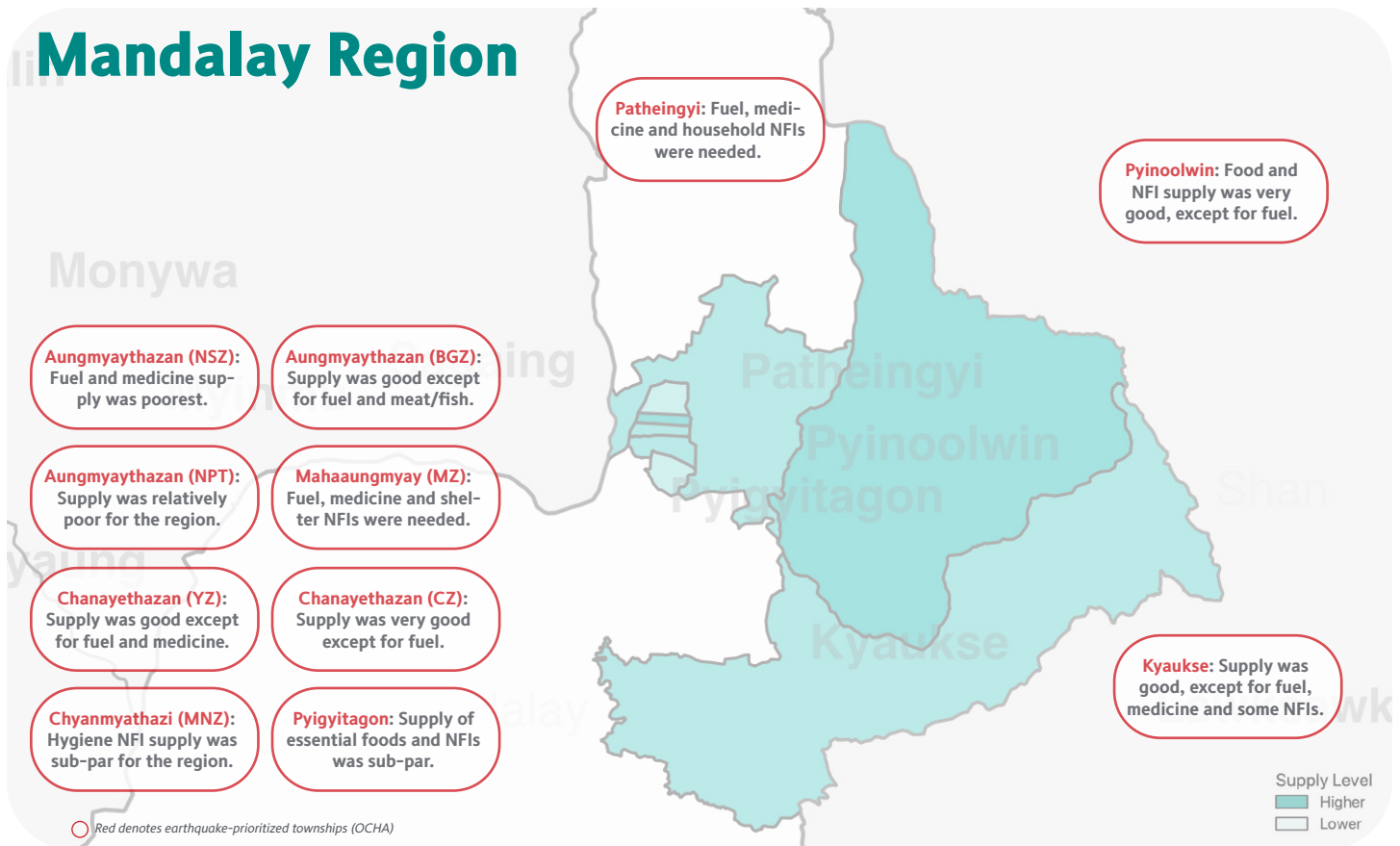
Chart 7.2. Portion of Markets with Closures (Magway)

100%





# Mandalay Region



## Market Functionality

Markets in Mandalay Region were open and generally safe to visit, but lingering earthquake effects continued to hamper retail. Infrastructure **damage** from the earthquake continued to drive temporary **closures** at markets in the region. Virtually all markets monitored received customers from neighboring villages and townships, but **transportation** was a challenge for retailers. They reported rising **shipping costs**, and some reported difficulties bringing rice from outside of Mandalay. **Supply** was another oft-cited retail challenge. Beyond goods for household consumption, retailers reported ongoing shortages of **construction** materials for rebuilding earthquake-damaged structures.

## Supply of Goods

Food and NFI supply declined in May, but it remained far better than in other regions monitored. Supply was poorest for **fuel**, and it declined for **hygiene** and **shelter** NFIs.

Chart 8.1. Operating Hours, by Market

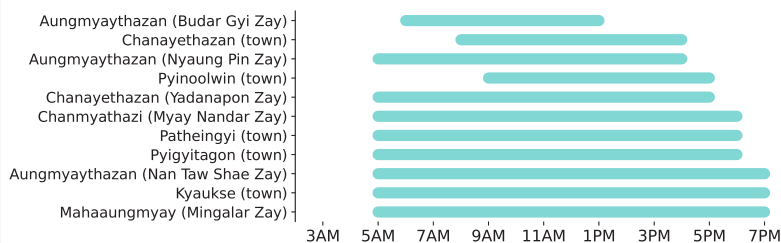


Chart 8.2. Portion of Markets with Closures (Mandalay)

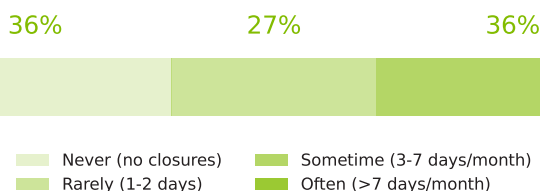


Chart 8.3 Food & NFI Supply, by Region

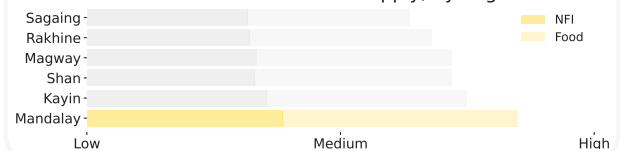
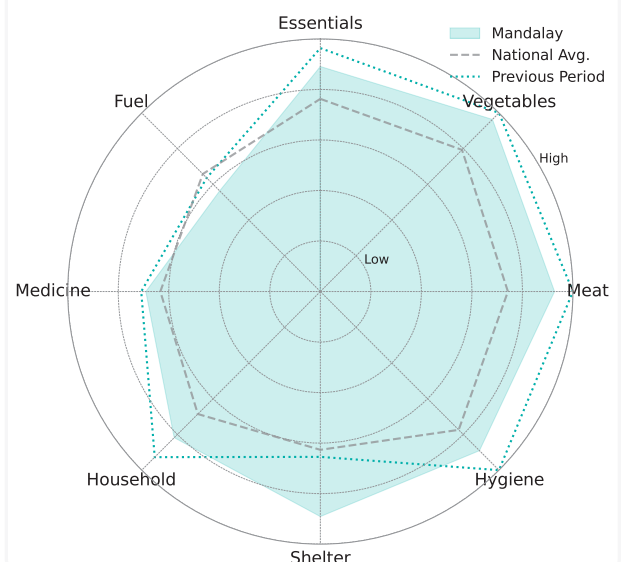
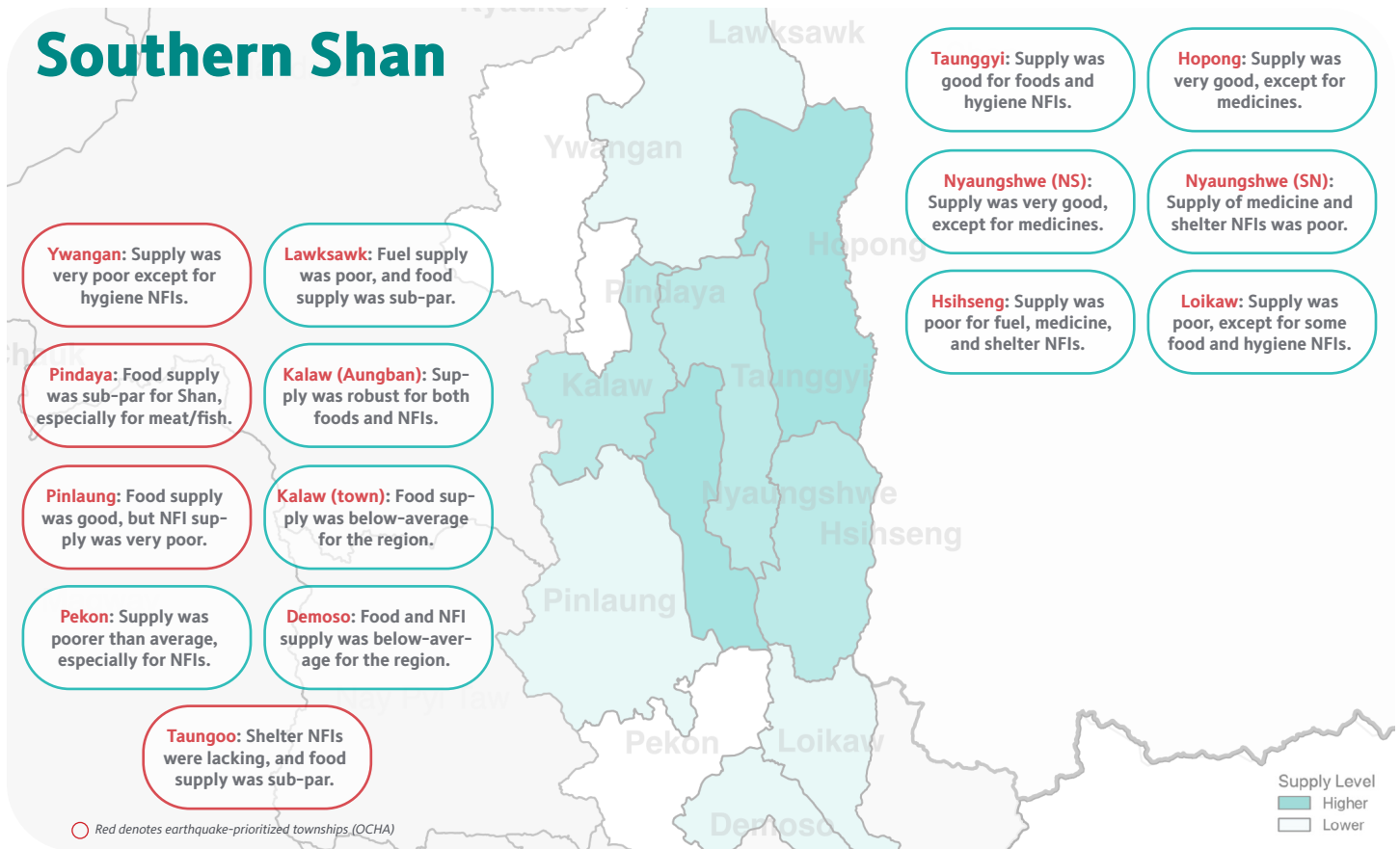


Chart 8.4. Supply, by Category (Mandalay)



# Southern Shan



## Market Functionality

Markets in Southern Shan State were operational and generally safe to visit, but conflict continued to impact retail. Most markets monitored continued to serve customers from surrounding villages and townships. However, markets in **Ywangan**, **Demoso** and **Pekon** were reportedly unsafe, and some experienced closures. Despite stable fuel supply, many retailers reported rising **shipping costs**. Markets in **Pin-daya**, **Lawksawk** and **Ywangan** cited the most retail challenges.

## Supply of Goods

Food and NFI supply was generally stable in Shan State in May. Supply remained poorest for **medicine** and **shelter** NFIs, but it improved slightly for vegetables and hygiene NFIs.

Chart 9.1. Operating Hours, by Market

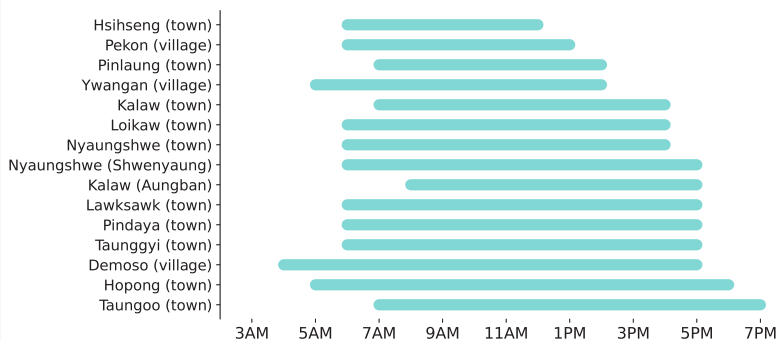


Chart 9.2. Portion of Markets with Closures (Shan)

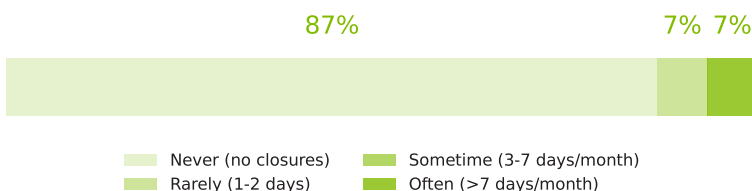


Chart 9.3 Food & NFI Supply, by Region

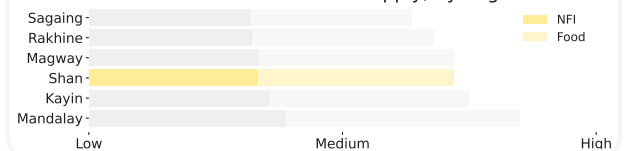
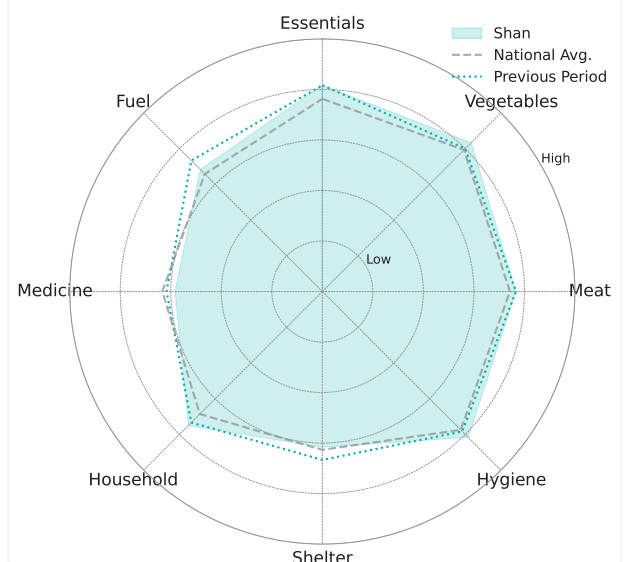
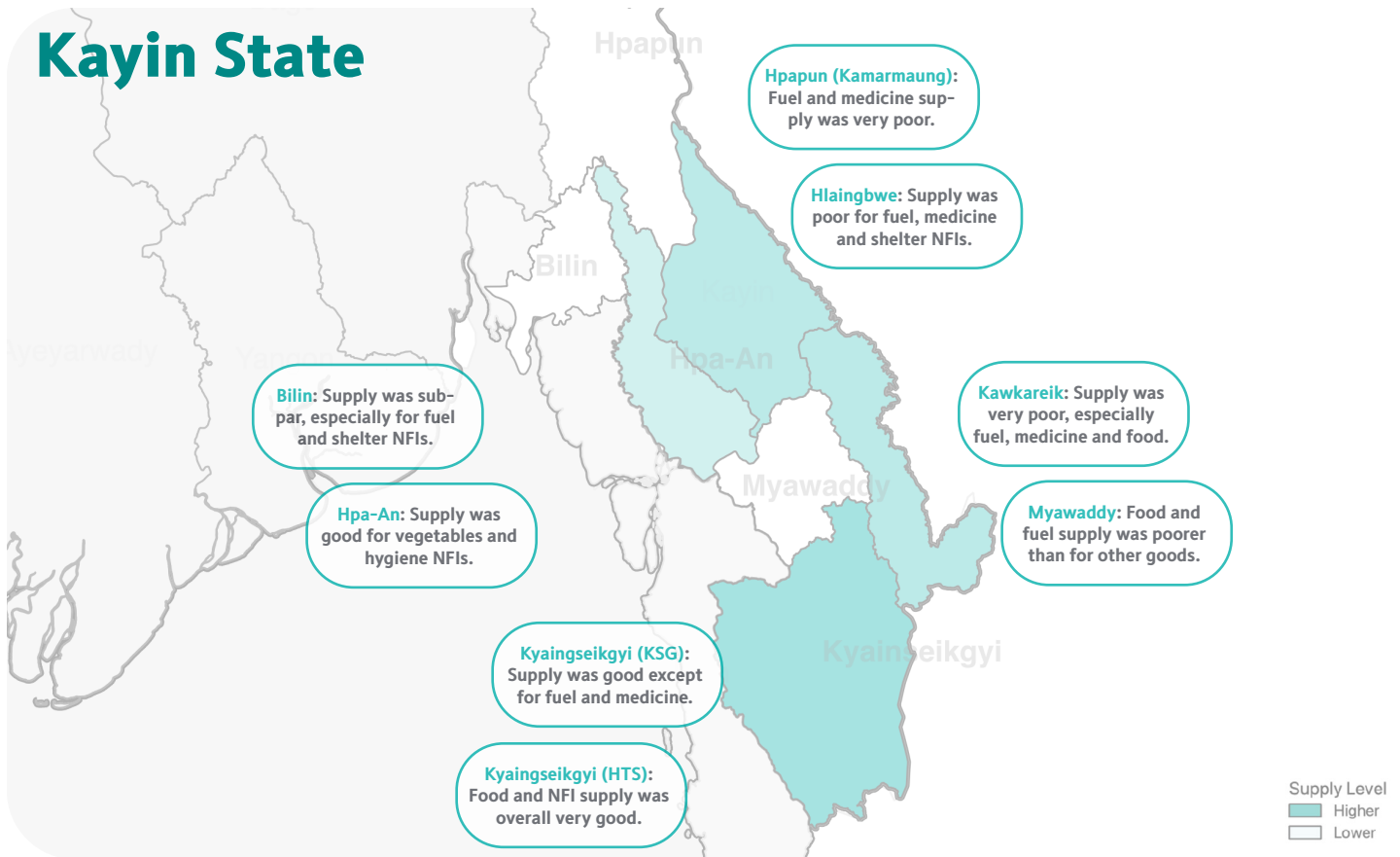


Chart 9.4. Supply, by Category (Shan)



# Kayin State



## Market Functionality

Markets were generally operational in Kayin State, although some remained unstable. **Kawkaireik** and **Bilin** markets experienced temporary closures, and Kawkaireik market remained unsafe and extremely isolated from trade. Most other markets continued to serve surrounding villages and townships. Retailers in Kayin State reported a high frequency of challenges compared to other states and regions monitored. **Transportation** was the most commonly reported challenge in May, although retailers reported a mix of stable and rising **shipping costs**. Multiple retailers also reported weak **demand** and sales as well as limited access to **supply**. Retailers in **Hlaingbwe** reported the most challenges, including the recent seizure of operating licenses from some businesses.

## Supply of Goods

Food and NFI supply improved in Kayin State. **Fuel** and **medicine** supply improved significantly, although they remained sub-par. Supply of other NFIs was above-average, and food supply improved.

Chart 10.1. Operating Hours, by Market

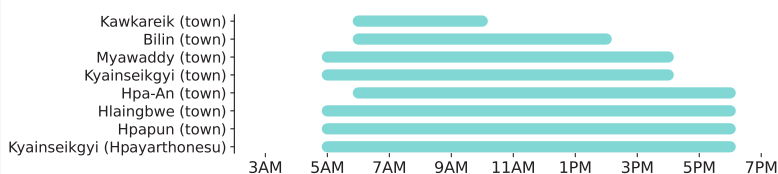


Chart 10.2. Portion of Markets with Closures (Kayin)

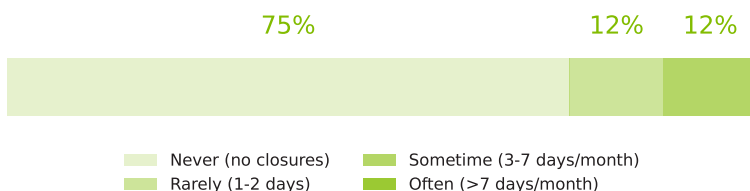


Chart 10.3 Food & NFI Supply, by Region

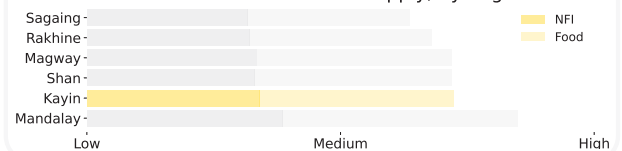
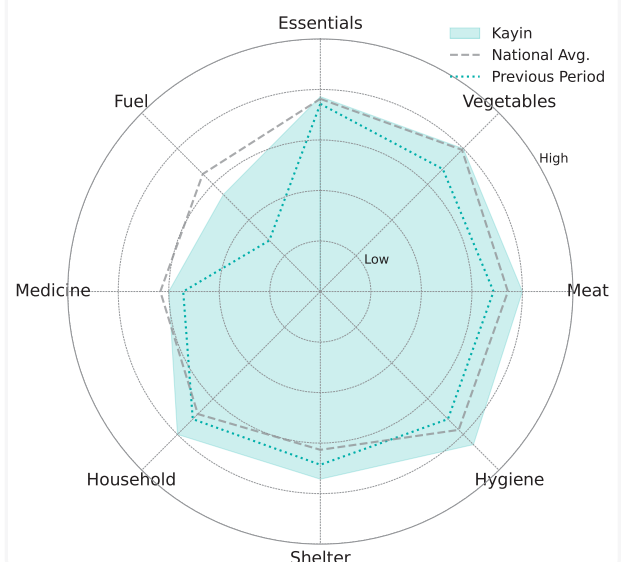


Chart 10.4. Supply, by Category (Kayin)

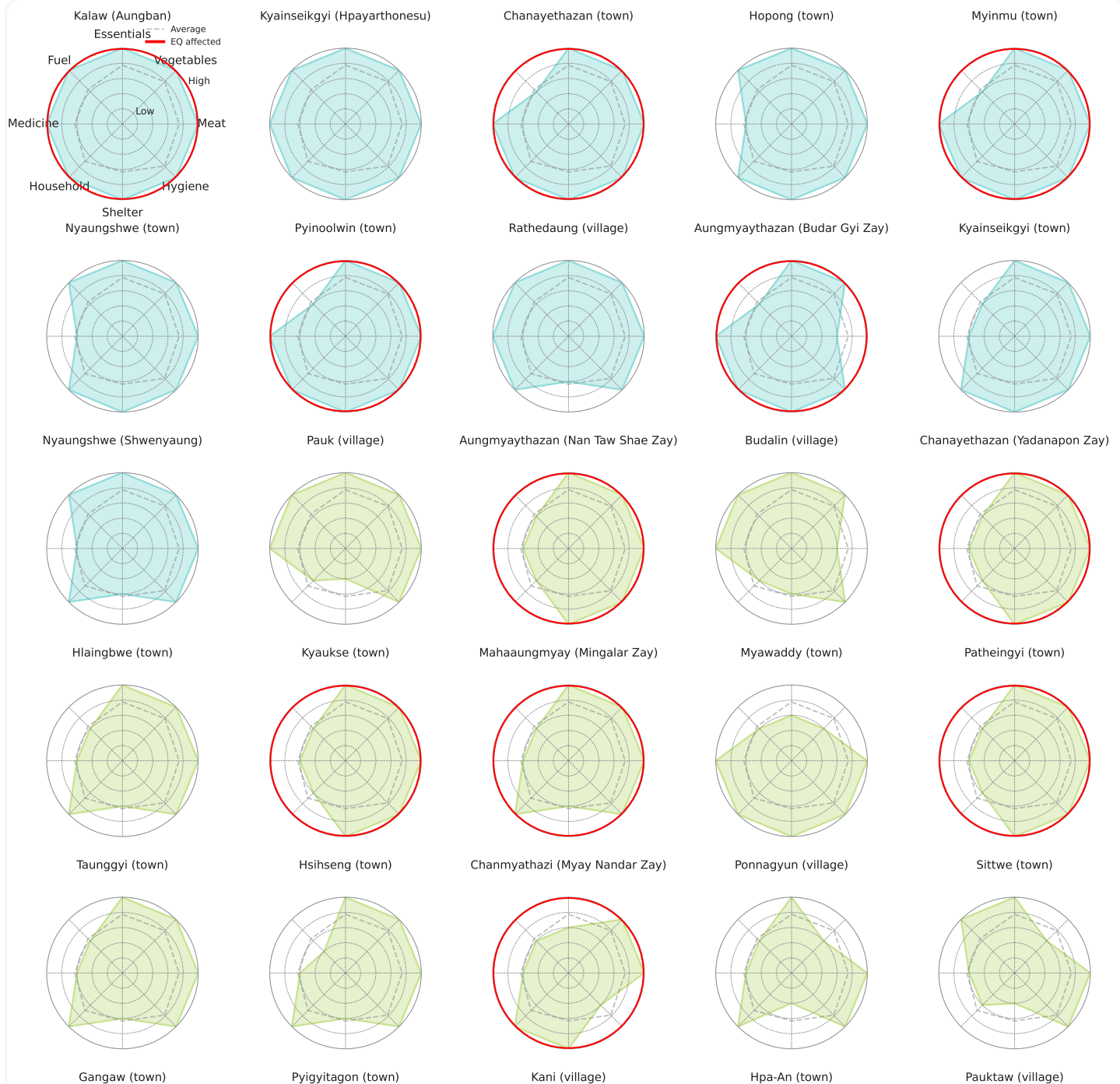




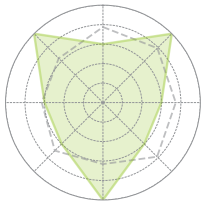
# Township Supply

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:

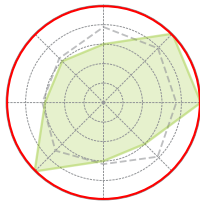
- Group A** - Markets with the best supply. These markets had good food supply, and in most cases they were deficient in just one NFI category;
- Group B** - Markets with good supply in some categories but poor supply in others. They were typically deficient in more than two categories of foods or NFIs;
- Group C** - Markets with below-average supply of many categories of goods. All had significant supply deficiencies, but some had good supply for one or two categories;
- Group D** - Markets with the poorest supply. Supply was well-below average in most or all categories of foods and NFIs. Some had major shortages of NFIs.



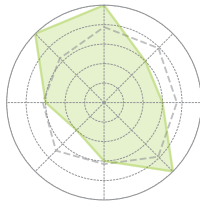
Gangaw (town)



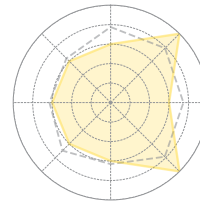
Pyigyitagon (town)



Kani (village)



Hpa-An (town)



Pauktaw (village)



Chauk (town)



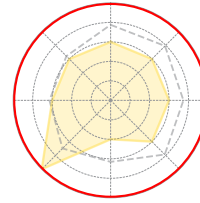
Myebon (town)



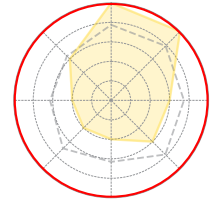
Kyauktaw (town)



Myaung (village)



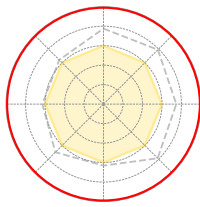
Pinlaung (town)



Demoso (village)



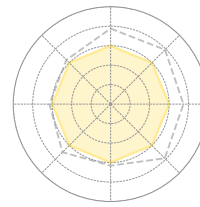
Kalaw (town)



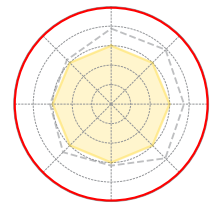
Loikaw (town)



Minbya (town)



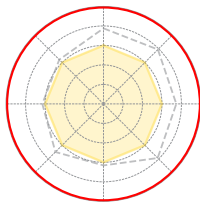
Monywa (town)



Tabayin (village)



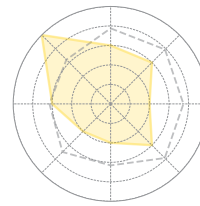
Ye-U (village)



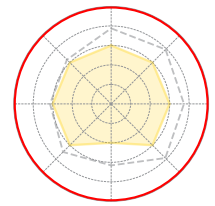
Lawksawk (town)



Maungdaw (village)



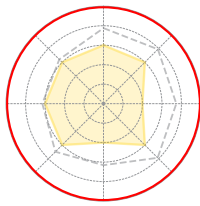
Taungoo (town)



Hpapun (town)



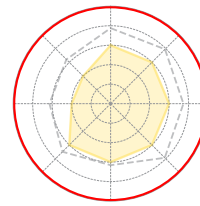
Pindaya (town)



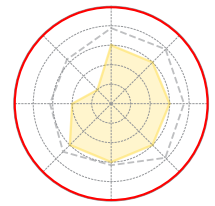
Saw (town)



Shwebo (town)



Aungmyaythazan (Nyaung Pin Zay)



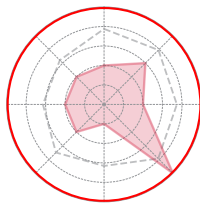
Bilin (town)



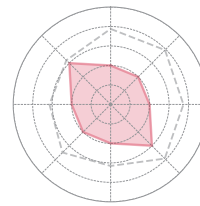
Pekon (village)



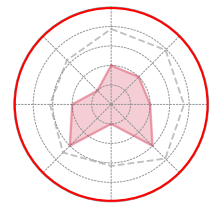
Ywangan (village)



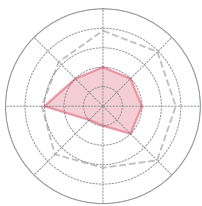
Yinmarbin (village)



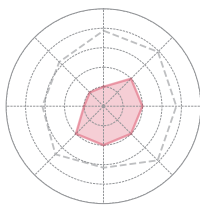
Sagaing (town)



Mrauk-U (town)



Kawkareik (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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