MARKET ANALYSIS UNIT

Kayah/Karenni State IDPs

*In early-October the MAU surveyed displaced households in/around Kayah (Karenni) State to better understand the challenges they face. Data are based on a probability sample representing 1300 households enrolled in cash assistance programs. MAU reports are available online at **www.themimu.info/market-analysis-unit**.*

KEY FINDINGS

- **Eighty-eight percent of households surveyed remained displaced as of September 2022**, and just 10% had returned to their home;

- **Fifty-two percent were living outside their original township,** and 23% were in another state;

- **Forty-eight percent of households were living in a a temporary shelter or displaced site**, in many cases more than one year after leaving their home;

- **Fifteen percent said their household could not travel to a food market in the past month**, and these households reported higher rates of negative coping behaviors;

- **Roughly one-third said various living conditions were poor**, and very few described them as "good;"

- **Nine percent of households ran out of food at some point in the past month**, and 15% said someone in their house skipped a meal.

BACKGROUND

Since early-2021, Kayah State has seen a rise in armed conflict and growing numbers of displaced persons. According to data from the Armed Conflict Location & Event Data Project (ACLED), the number of monthly conflict-related events in Kayah State spiked in May 2021 and again in January 2022. Throughout 2022, conflict in Kayah State has continued to dip and spike periodically (see **Figure 1**).[1] As of September 2022, the United Nations estimates there to be nearly 75,000 IDPs in Kayah State and an additional 30,000 IDPs in neighboring Pekon Township (South Shan).[2] The IDP populations of Demoso, Hpruso, Loikaw and Pekon Townships are among the largest township-level IDP populations in Myanmar.

This study surveyed households displaced by armed conflict to understand their living conditions and access to markets/goods. The survey of 343 households represents a population of roughly 1300 households en-

rolled in one or more cash programs. Three-quarters of all respondents were most-recently displaced between April and June 2021, while most others were displaced in the following 12 months. Nearly all participants previously received cash assistance from one or more parties (albeit at various points in time), however the study is not intended as an evaluation of the effectiveness of cash programs; nor is the study intended to represent all IDPs in Kayah State. The purpose of the study was to understand the basic needs of IDPs and their ability to address those needs through access to markets and essential goods.

LOCATION AND SHELTER

Most households remained displaced more than one year after leaving their homes, and many now live in another township or state. Eighty-eight percent of households remained displaced as of October 2022, 10% had returend to their original homes, and just 2%

FIGURE 1. Conflict Events in Kayah State, by Month
Conflict events in Kayah State spiked in May 2021 and Jan. 2022.
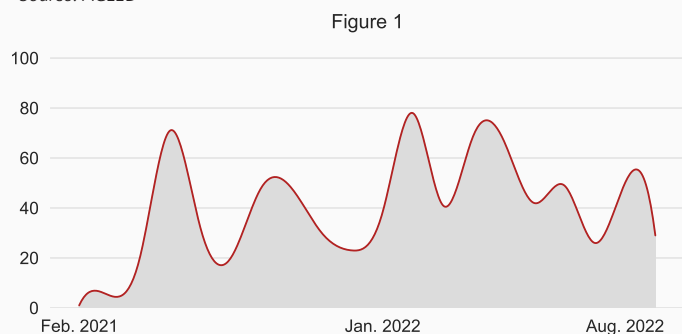
Source: ACLED

FIGURE 2. Type of Shelter
Most households lived in host homes or temporary shelters.

[1] ACLED. September 2022. Armed Conflict Location and Event Data Project. www.acleddata.com.
[2] UN in Myanmar. September 2022. Myanmar Humanitarian Update No. 21.

FIGURES 3 & 4. Portion of Households Describing Various Living Conditions as "Poor"
Roughly one-third of households said living conditions were poor, and two-thirds said access to work/livelihood opportunites was poor.
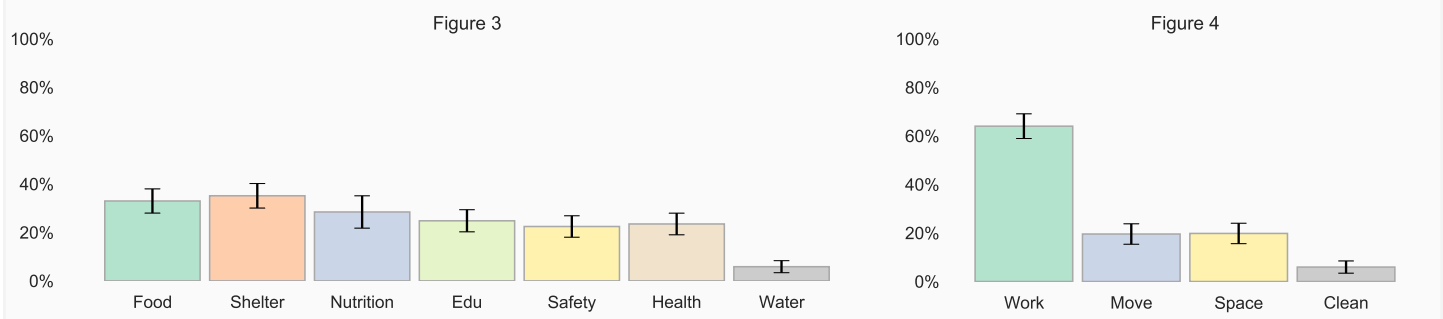
had been resettled in a new home.[3] Fifty-two percent of households (most of whom previously lived in Demoso Township) left their township and have not yet returned. Most of those now living in another township live in Loikaw Township, but many others left Kayah State. Twenty-three percent of all households surveyed left their state, most of whom now live in Shan State (e.g., Taunggyi, or elsewhere in South Shan). Among all households, 43% were living in a house (typically that of a host family), 27% were in temporary shelters (e.g., forested area or on farmland), 21% were in displaced sites and 9% were in religious buildings (see **Figure 2**).

LIVING CONDITIONS

Between one-quarter and two-thirds of all house-

holds described various living conditions as "poor." In most cases, there was no statistical difference between the portion of respondents describing various conditions as "poor" (see **Figure 3**). That said, some conditions (e.g., food security, access to shelter) were more often unsatisfactory than others (e.g., safety/security, access to healthcare). Access to clean water for bathing and cleaning was relatively good: just 6% of households described access to water as "poor," and 35% described it as "good" (likely to be in part seasonal). Poor food security—as well as difficulty accessing various products—appeared correlated with poor safety/secuirty and poor freedom of movement, although exploring the reasons behind respondents' viewpoints requires additional research.[4]

Relatively few households said freedom of movement was poor, although many were concerned about livelihood/work opportunities. Just one-in-five households described freedom of movement as "poor", although those who did appeared to face other challenges as well (see **Access to Markets and Goods**). Similarly, 20% of households described space—or freedom from overcrowding—as "poor." Sixty-four percent of households said access to livelihood/work opportunities was "poor" (see **Figure 4**). Cleanliness—like access to clean

[3] Estimates in this report assume 95% confidence intervals and a 5% margin of error (with the exception of nutrition and remittances).
[4] Correlation is not causation.

Figure 5 — Oil, Rice, Shelter/NFIs, Meat, Medicine, Hygiene, Veg

Figure 6 — CVA, Credit, Work, Savings, Remittances
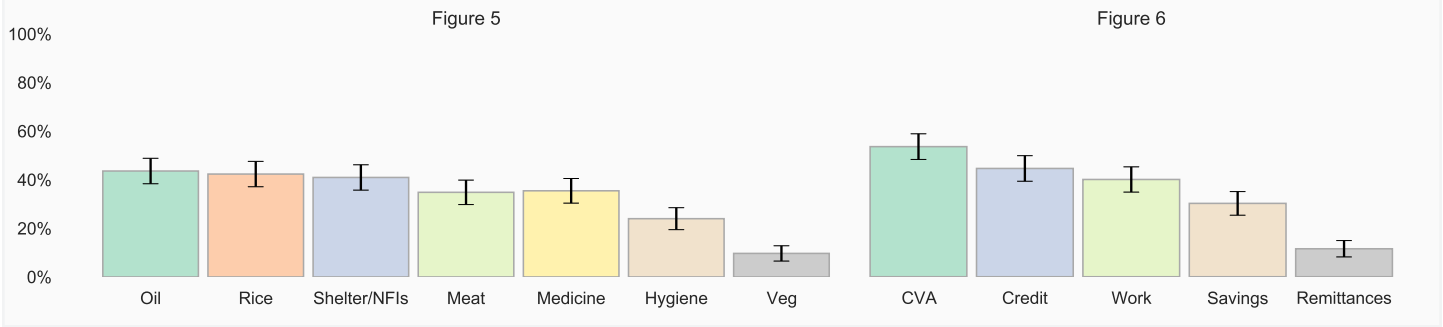
water—was fairly good, with 94% of households described cleanliness as "moderate" or "good."

ACCESS TO MARKETS AND GOODS

Most respondents said someone from their household could travel to a food market, while the remainder cited distance or lack of transportation as major barriers. Eighty-five percent of respondents said someone from their household was able to travel to a food market in the past thirty days, suggesting market access is possible for most. Interestingly, among those unable to travel to market, distance or lack of transportation (50%) was more often cited as the primary impediment than safety (21%) or blocked/closed roads (5%), although these reasons should not be treated as mutually exclusive. Forty-one percent of households said the nearest food market was at least thirty-minutes away by foot (although the distance to market may be considerably more than 30 minutes).

Between one-third and one-half of households said access to various products was poor, although very few said this of vegetables or hygiene products. The level of accessibility of various products was quite similar (see **Figure 5**). Roughly 35-45% of respondents described access to cooking oil, rice, shelter-related NFIs, meat and medicine as "poor," and fewer than 15% described access to any one of them as "good." Vegetables

stood out as uniquely accessible (just 10% said access was poor), as did hygiene products like soap and toothpaste (24%). There was no observable relationship between freedom of movement and access to particular products (although there were some apparent associations, such as poor access to medicine and poor access to healthcare).
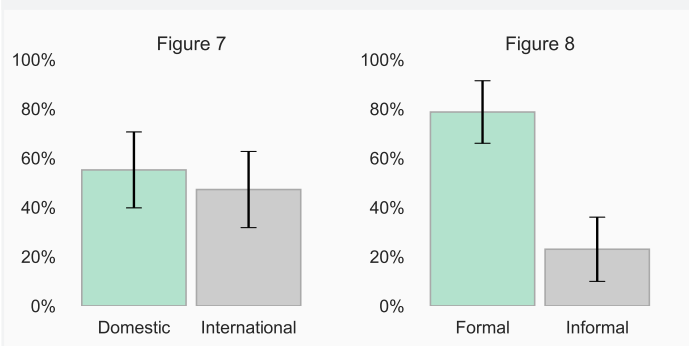
SOURCES OF FUNDS FOR FOOD

In the past thirty days, cash assistance, cash from work, credit and savings were all common sources of funds for buying food. In the past thirty days, 54% of households used cash assistance to buy food, and a similar proportion of respondents bought food with credit or income from work (see **Figure 6**). Households were more likely to buy food with credit (45%) than with savings (31%). Interestingly, the use of cash assistance was particularly common among households which received such assistance in the past two months, but it was not uncommon among households had most-recently received it three or four months earlier (suggesting that use may be paced). Most of those who bought food with income from work did farmwork, although a few worked in services or construction.

Roughly one-in-ten households used remittances to buy food in the past thirty days. Twelve percent of households bought food with remittances in the past thirty days, which is well below the 23% of households in Kayah State found to have recieved remittances in a twelve month period in the 2017 MLCS.[5] Remittances originated from both domestic and international sources, although the channels skewed heavily toward formal modes of transfer. Seventy-nine percent of households receiving remittances in the past month used a formal channel such as a mobile payment platform, while just 23% used an informal mode such as hand-transfer (see **Figure 8**).

FOOD INSECURITY & COPING

There appeared to be considerable variation among

Figure 7 — Domestic, International

Figure 8 — Formal, Informal

[5] 2017 Myanmar Living Conditions Survey (MLCS).

households with respect to negative coping behaviors associated with food insecurity. Households' Reduced Coping Strategies Index (rCSI) scores—which measure behaviors in the past seven days associated with food insecurity—varied considerably. The median rCSI score for all households was 7.0, although some households scored much worse. Household rCSI scores were correlated with differences in mobility, which may partly explain differences in food security (see **Living Conditions**). The large majority of respondents who said someone from their household could travel to a food market reported a median rCSI of 5, while those who said they could not reported a much worse median rCSI of 28.

One-in-ten households adopted extreme negative coping behaviors for dealing with food insecurity in the past thirty days. Extreme coping behaviors—such as going-hungry, going a whole day without food, or running out of food at some point in the past thirty days—were each reported by fewer than 10% of all households (see **Figure 9**). As a point of comparison, this was about half as frequent as reported in a similar study of IDPs

in Sagaing Region in August 2022.[6,7] Fourteen percent of households also said someone skipped a meal in the past thirty days because of lack of resources to buy food. Less-severe coping behaviors were more common. Forty-six percent said someone ate less than they thought they should in the past thirty days, two-thirds said someone was unable to eat healthy and/or ate only a few kinds of foods, and 77% said someone "worried about not having enough food."

FIGURE 9. FIES Food Insecurity Indicators (Past 30 days)
At least one-in-ten households reported severe indicators.
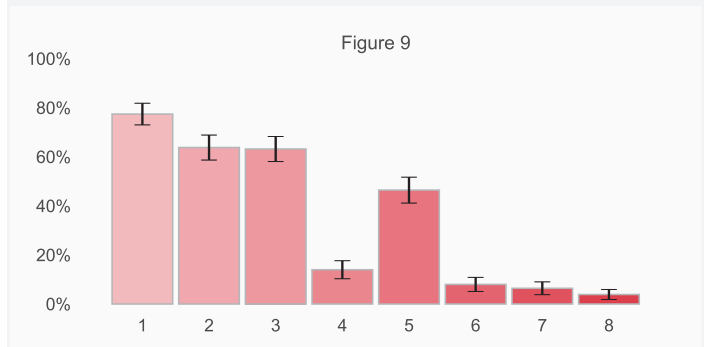
BOX 3. Description of FIES Indicators
The MAU regularly collects data on eight Food Insecurity Experience Scale (FIES) indicators, which measure the following behaviors:

In the past thirty days, there was a time when someone in the household...

FIES 1 - Worried about not having enough food to eat because of a lack of money or other resources.

FIES 2 - Was unable to eat healthy and nutritious food because of a lack of money or other resources.

FIES 3 - Ate only a few kinds of foods because of a lack of money or other resources.

FIES 4 - Had to skip a meal because there was not enough money or other resources to get food.

FIES 5 - Ate less than they thought they should because of a lack of money or other resources.

FIES 6 - Ran out of food because of a lack of money or other resources.

FIES 7 - Was hungry but did not eat because there was not enough money or other resources for food.

FIES 8 - Went without eating for a whole day because of a lack of money or other resources.

IMPLICATIONS

- **Additional assistance may be needed for households unable to travel to food markets.** Households unable to travel to a food market reported higher rates of negative coping behaviors associated with food insecurity, suggesting that these households may need more or different assistance to avoid food insecurity;
- **Households may welcome support for increased livelihood opportunities.** Many households described work/livelihood opportunities as "poor"—possibly because they now live in a new and unfamiliar state or township—and many reported buying food with debt or savings. Support for new livelihood/income opportunities may be of particular interest households and help reduce debt reliance and depletion of savings.
- **Further research may be needed to better understand the challenges some households face.** Similar portions of responses reported various conditions or product-availability as "poor," making it difficult to identify priorities. Further research may be needed to parse out key priorities and differences between subgroups.

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[6] Market Analysis Unit. September 2022. Survey of IDPs in Sagaing Region.
[7] Caution is warrented in making such comparisons.

Market Analysis Unit (MAU)

The Market Analysis Unit provides development practitioners, policymakers and private sector actors in Myanmar with data and analysis to better understand the impacts of Covid-19, 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 service).

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