

Sagaing Region IDPs

In late-August / early-September the MAU surveyed recently-displaced households in Sagaing Region to better understand the challenges they face. Data are based on a probability sample representing 2700 households enrolled in cash assistance programs. MAU reports are available online at www.themimu.info/market-analysis-unit.

KEY FINDINGS

- **Half of all households surveyed lived in temporary shelters**, and 61% had poor access to shelter materials;
- **Nearly half described food access, health care, and security as poor**, and 61% said access to education was poor, but water and cleanliness were good for some;
- **Fifty-six percent said mobility was poor**, and 64% must travel at least 30 minutes to reach a food market;
- **One-third could not travel to a food market in the past month**, due to safety, roadblocks or transportation;
- **Shelter, medicines, rice and cooking oil were all hard to acquire** and may become more so in coming months;
- **In the past month, at least one-in-ten adopted severe negative coping strategies related to food**, like running out of food or going a day without eating;
- **Two-thirds obtained food through work in the past month**, although 46% said access to work was poor.

BACKGROUND

Escalating armed conflict has led to hundreds of thousands of newly-displaced persons in Sagaing Region in the past year. According to data from the Armed Conflict Location & Event Project (ACLED), the number of conflict-related events in the region doubled in the second half of 2021 and remained high through 2022 (see **Figure 1**).¹ These events have been accompanied by massive growth in the number of internally displaced persons (IDPs) in Sagaing Region. As of September 2022, Sagaing Region was home to an estimated 528,000 IDPs, with significant IDP populations in more than half of the region's 34 townships.² Beyond the immediate safety concerns presented by displacement, many IDPs struggle to access essential foods and non-food items (NFIs) due to limited mobility, lack of resources, poor supply of goods, and disruption of local or regional market systems. Yet there remains precious little structured data on the conditions and needs of IDPs in Sagaing Region.

This study surveyed recently-displaced households in nine Sagaing Region townships about living conditions and access to markets and essential goods. The survey of roughly 400 households represents a population of more than 2700 households enrolled in one or more cash programs. The study focused on understanding the basic needs of current or former IDPs as well as their ability to address those needs through access to markets and essential goods. While many participants previously received cash assistance, others had not, and the study is not intended as an evaluation of the effectiveness of cash programs; nor is the study intended to represent all IDPs in Sagaing Region.

LOCATION AND SHELTER

The great majority of households surveyed were displaced recently and still living in temporary shelters. Eighty-three percent of households surveyed were dis-

FIGURE 1. Conflict Events in Sagaing Region, by Month

Conflict events in Sagaing Region have increased since 2021.

Source: ACLED

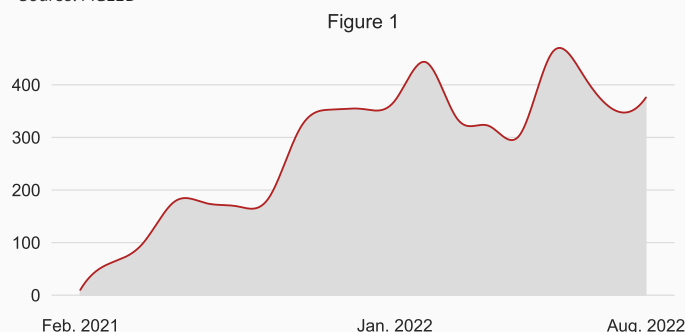
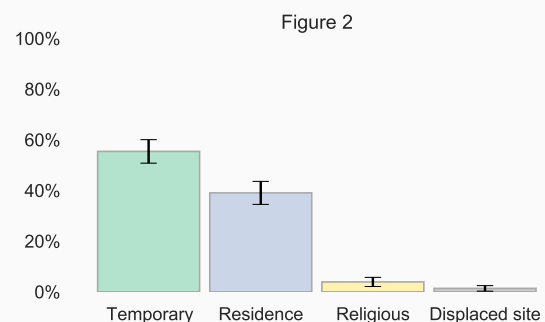


FIGURE 2. Type of Shelter

Fifty-six percent of households remain in temporary shelters.



¹ ACLED. September 2022. Armed Conflict Location and Event Data Project. www.acleddata.com.

² OCHA. September 2022. Myanmar Humanitarian Update No. 21.

BOX 1. Living Conditions Measures Used in the Survey

This study asked respondents about conditions related to seven strategic response priorities in the 2022 Humanitarian Response Plan (HRP). The HRP represents the coordinated plan for humanitarian agencies to meet the acute needs of people affected by recent crises in Myanmar. The HRP was used as a guide only, and data do not reflect progress toward related objectives. The HRP-based measures in this study include:

Education - Access to education/materials;
Food - Access to food;
Health - Access to physical/mental health care;
Safety - Conditions for basic safety/security;

Nutrition - Nutritional status of children under age five and pregnant/ breastfeeding women;
Shelter - Access to basic shelter/materials;
Water - Access to water for cleaning/hygiene.

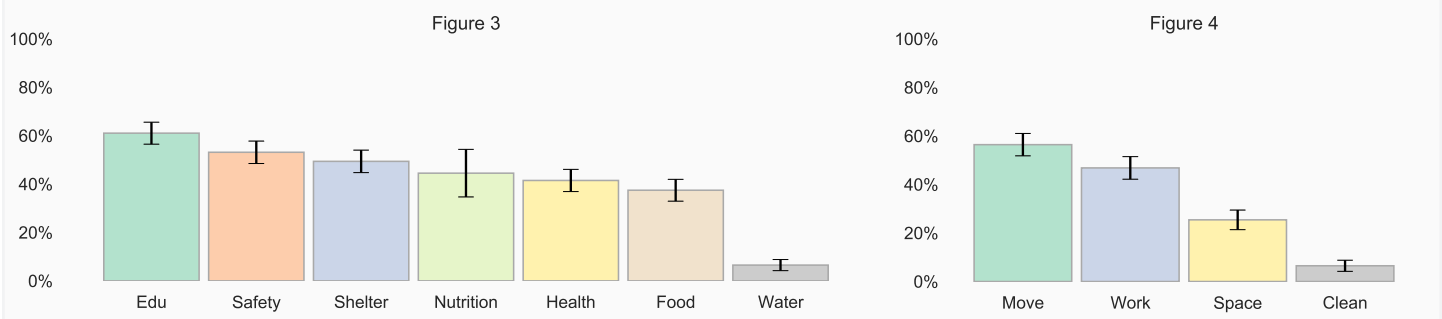
This study also asked about several other ancillary or crosscutting conditions:

Movement - Freedom of movement;
Work - Access to livelihood/work opportunities;

Space - Sufficient space (absence of overcrowding);
Cleanliness - Access to a clean/sanitary environment.

FIGURES 3 & 4. Portion of Households Describing Various Living Conditions as "Poor"

Access to education was often described as "poor," while cleanliness and access to water were often "moderate" or "good."



placed in 2022, and roughly half were displaced in the past six months during April-August 2022 (households may have been displaced more than once).³ Sixty-five percent of households remained in the town/village where they lived prior to displacement, while 35% remained in another town/village (see **Figure 2**). Six percent of households had left Sagaing Region and not returned.⁴ Most households still lacked permanent shelter, and relatively few lived in houses (either their own house or that of a host family). Just 39% of households lived in a house, while 56% lived in a temporary shelter (e.g., a shelter constructed in a forested area or on farmland). Very few households were sheltered in a religious institution such as a monastery or church (4%) or in a displaced site or organized camp (1%).

BOX 2. Children and Pregnant/Breastfeeding Women

Nutrition for children under five and pregnant or breastfeeding women was often poor. Many households included children under age five (42%) or a woman who was pregnant or breastfeeding (22%). The study asked only these households about nutritional access for these subgroups. Among those surveyed, 45% described nutritional for children and pregnant or breastfeeding women as "poor."

LIVING CONDITIONS

Many households said access to education was poor, although many also struggled with health care, food security, shelter and basic safety. Sixty-one percent of households said access to education/materials was "poor" (see **Figure 3**), and roughly half said the same of basic safety, shelter, health care, and food security (although the difference between each of these was often not statistically significant). Access to clean water for bathing and cleaning was relatively good. Just 7% of households described access to water as "poor," and 43% described it as "good." Poor access to shelter and safety may be driven in part by the recentness of displacement for many households, one-third of whom remained in temporary shelters (see **Living Conditions**). Good access to clean water may be due in part to a seasonal effect, as water supply is superior in the rainy season (although it will likely decline in coming months).

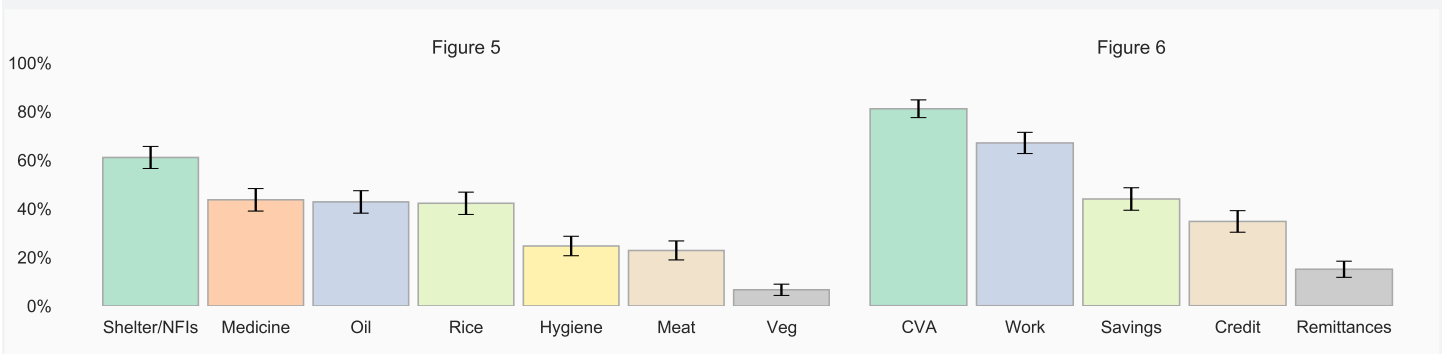
Most households reported serious limits on movement and poor access to work opportunities. Fifty-six percent of households described their freedom of movement as "poor," and 47% said the same of access to livelihood/work opportunities (see **Figure 4**). Freedom of movement was positively correlated with access to food, health care, shelter and basic safety; while not necesar-

³ Estimates in this report assume 95% confidence intervals and a 5% margin of error (with the exception of nutrition and remittances).

⁴ These households--many of whom were in nearby Mandalay Region--remain in the sample, although their responses represent conditions outside of Sagaing Region.

FIGURES 5 & 6. Access to Products & Sources of Funds for Acquiring Food

Access to shelter-related products was often described as "poor," while poor access to vegetables, meat and hygiene products was rarer.



ily causal, it is plausible that mobility is one significant determinant of these (there was no correlation between movement and work opportunities or other conditions). Consistent with the above reports of access to water, 22% of households said cleanliness in their current residence was "good" (most described it as "moderate"). Space—or the absence of overcrowding—also fared relatively well, with 75% describing their access to space as "moderate" or "good."

ACCESS TO MARKETS AND GOODS

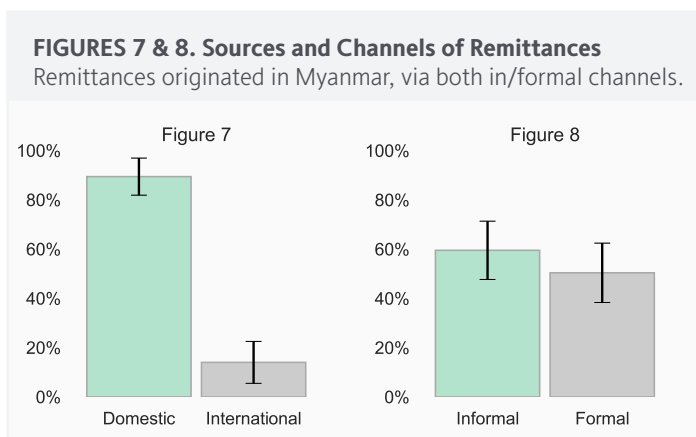
One-third of households said they were unable to travel to a food market in the past thirty days, while others did so only with great effort. Thirty-three percent of respondents said no one from their household was able to travel to a food market in the past thirty days (such households presumably rely on intermediaries/traders, in-kind support, or other assistance to acquire food).⁵ As noted above, 56% percent of households described freedom of movement as "poor" (see **Living Conditions**). Most households attributed the inaccessibility of markets largely to safety concerns, although some pointed to road closures/checkpoints, insufficient means of transportation, or distance. For example, 64% of households said the nearest food market was at least thirty-minutes away by foot. Anecdotally, there were various explanations for the lack of nearby markets, such as prohibitions on travel to nearer markets or damage to

market infrastructure which rendered them inoperable.

Many households said access to shelter materials and other NFIs was poor, and others also struggled to acquire medicines, cooking oil and rice. Sixty-one percent of households described access to shelter-related materials/NFIs (e.g., plastic tarps, blankets, towels) as "poor" (see **Figure 5**). Poor access to shelter materials may be due to higher seasonal demand during rainy season and/or demand surges resulting from a growing IDP population. Roughly 40% also described access to rice, oil and medicines—all goods with steady year-round demand—as "poor." One-quarter of households described their access to meat/fish and hygiene products as poor. Only vegetables were described as being fairly accessible: just 7% of households said their access to vegetables was "poor," and 26% described it as "good."

SOURCES OF FUNDS FOR FOOD

In the past thirty days, many households relied on farm work and cash assistance to meet their household food needs. Eighty-one percent of households used cash assistance to purchase food in the past thirty days (see **Figure 6**). Although many households described access to work as "poor" (see **Living Conditions**), in the past thirty days 67% bought food with cash or resources earned through work. Three-quarters of these households relied primarily on farm work (which should be in high-demand at this point in the paddy-growing season).⁶ Fewer than 10% of households relied primarily on work in other sectors such as trade, services or construction. It was less common to buy food with savings or credit, although buying food with savings (44%) was slightly more common than buying food on credit (35%).



FIGURES 7 & 8. Sources and Channels of Remittances

Remittances originated in Myanmar, via both in/formal channels.

⁵ Households unable to travel to food markets may buy limited goods from local kiosks, farmers, or mobile traders; however these goods may be costlier and/or lower in quality.

⁶ Farm work may not always be paid in cash. In some cases, workers may be compensated in-kind with rice or other edible goods.

households in Sagaing Region received remittances in a twelve-month period.⁷ Households which recently spent remittances were much more likely to have received them from inside Myanmar than from abroad (see **Figure 7**). Eighty-nine percent of recipients received remittances from inside Myanmar, compared to just 14% who received them from abroad (the MLCS reported 85% and 20%, respectively). Among recipients, both formal and informal channels were widely used to receive remittances, although most recipients used only one or the other (see **Figure 8**). Anecdotally, recipients who used formal channels to receive remittances often used Wave Money.

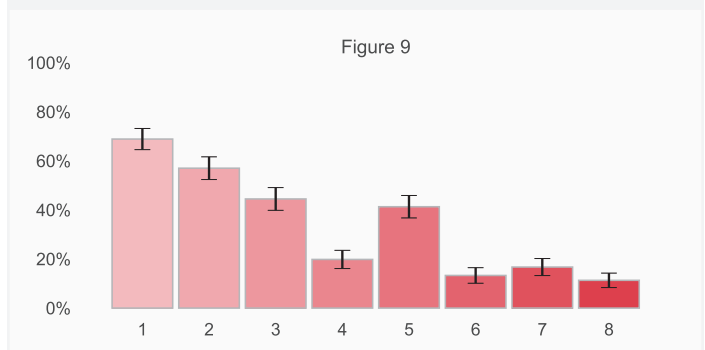
FOOD INSECURITY & COPING

Food security is likely poor for many households, but cash assistance may have helped reduce negative coping strategies. As noted above, 37% of households described their access to food as "poor" and just 6% described it as "good" (see **Living Conditions**). On the other hand, the average Reduced Coping Strategies Index (rCSI) score for households was 6.41, which is better than might be expected (particularly during the difficult rainy season). This may be in part because the rCSI focuses on behaviors only during the previous week, and many households may have received cash assistance shortly before being surveyed (this was confirmed an-

ecdotally by some respondents). Food Insecurity Experience Score (FIES) indicators—which focus on behaviors in the past thirty days—painted a less rosy picture.

At least one-in-ten households adopted severe negative coping strategies for dealing with food insecurity in the past thirty days. Severe indicators of food insecurity such as running out of food, going-hungry and going a whole day without food were reported by 11-17% of households, and 20% said at least one person skipped a meal (see **Figure 9**). More than half of all households reported worrying about food or failing to eat nutritious 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

- **Poor mobility and market access may call for in-kind and/or logistical support.** The relationship between safety, mobility, and food/shelter access may suggest the need for in-kind support and/or delivery solutions;
- **Providing shelter materials may have a wide impact.** Fifty-six percent of households remain in temporary shelters, and markets may be unable to satisfy rising demand in the short-run, suggesting in-kind support could be impactful;
- **The portion of households in need of medicines and cooking oil may grow.** Rice access may improve as harvest arrives, but a weak kyat suggests that access to imported medicines and cooking oil may only worsen;
- **Cash assistance remains important for households with market access.** Recent use of cash support (81%) may help explain low rates of very-recent negative coping behaviors, however further research is needed to understand aid modalities and the mechanisms by which low-mobility households acquire goods without traveling;
- **Cleanliness and access to water for cleaning and hygiene may worsen in the months ahead.** Water and cleanliness were often described as "good," but conditions may worsen as seasonal rainfall subsides.

⁷ 2017 Myanmar Living Conditions Survey (MLCS).

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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