

August 2025

Rapid Market Assessment

This Rapid Market Assessment (RMA) provides data on market function, supply, activity, and logistics in 58 earthquake/non-earthquake townships across 9 states/regions. Data were collected August 15-26 through observation and KIIs with 119 retailers. Reports available at www.themimu.info/market-analysis-unit.



KEY FINDINGS

- **Market operations and security were stable**, although they worsened in parts of Magway and Shan State;
- **Trade linkages were generally good**, although markets in southwest Sagaing struggled to link with other markets;
- **Fuel and NFI supply improved irregularly in August**, as markets in regions like Kayin State faced shortages;
- **Food supply was generally stable**, and in Rakhine essential foods and meat/fish supply improved;
- **Transportation and shipping was poor in most regions**, and it badly hampered supply in some townships;
- **Supply dipped the most in Magway Region**, where poor security was a major driver of retail challenges;
- **Supply continued fluctuating in Mandalay markets**, but it was on net stable after several months of decline;
- **Supply varied considerably across Southern Shan State** as security worsened in some areas.

Overview

Market operations were generally stable in August, and there were signs of improved NFI supply in some regions. Market closures remained relatively rare, yet security continued to be a major concern at a few markets in each region. NFI supply improved in regions like Rakhine and Sagaing due to better supply of shelter NFIs and in some cases even fuel, yet fuel supply was a major challenge in Kayin State. Food supply was stable but still poor in many markets. Transportation and shipping were among retailers' greatest worries, as conflict and in some cases flooding closed routes, slowed shipping, and added informal fees to the cost of moving goods.

Chart 1.1. Supply, by Category (Township Avg.)

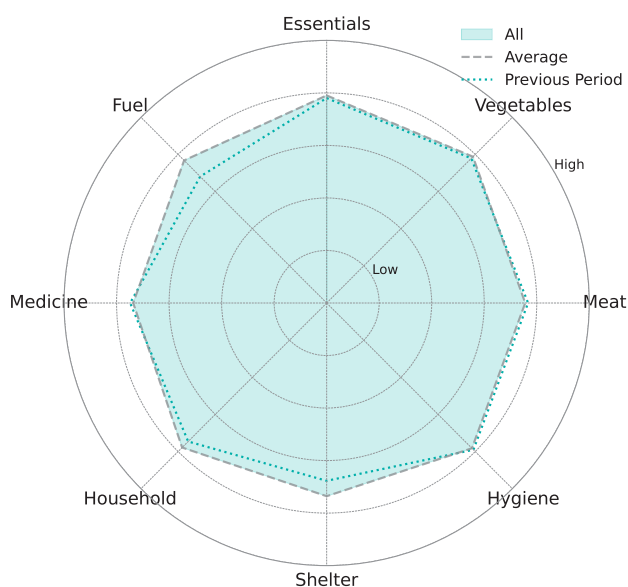
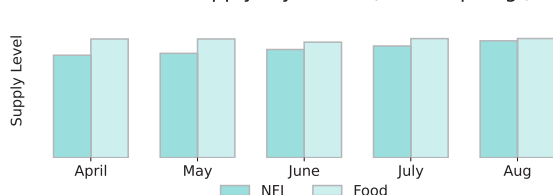


Chart 1.2. Supply, by Month (Township Avg.)



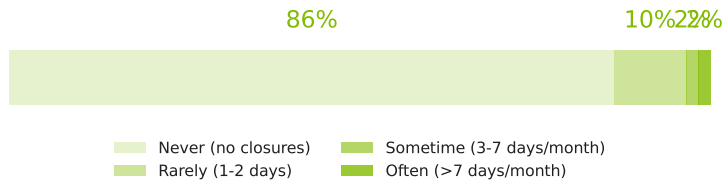
What to Watch

- Markets for **fuel** and **exchange rates** will continue to impact retail, perhaps most in **Kayin State**;
- As security developments boost or curtail supply, **Magway Region** may require particular attention;
- Upcoming **rice** and **vegetable** harvests should improve local food supply;
- Seasonal factors may soon have asymmetrical impacts on regional supply due to productivity differences.

Market Functionality

Operations remained relatively functional in the markets monitored, although there was a slight increase in the portion experiencing closures (**Chart 2**). Market security improved in some locations but worsened in others.

Chart 2. Portion of Markets with Closures (All)



22% Markets described as "unsafe" or "very unsafe."
2% Markets reporting recent damage.

98% Markets serving nearby villages.
81% Markets serving serving nearby townships.

Supply of Goods

Each region saw diverse supply profiles among its constituent townships. Many poorer-supplied markets were in Southern Shan State, although this region also had well-supplied markets. Mandalay markets were clustered in the center as supply of foods and NFIs fluctuated (**Chart 3**). The breadth of goods on offer in markets remained stronger than the depth or level of supply or inventory. Larger markets naturally continued to have more robust inventory (**Chart 4**).

Chart 3. Supply of Foods and NFIs

Red denotes Earthquake-prioritized townships (OCHA)

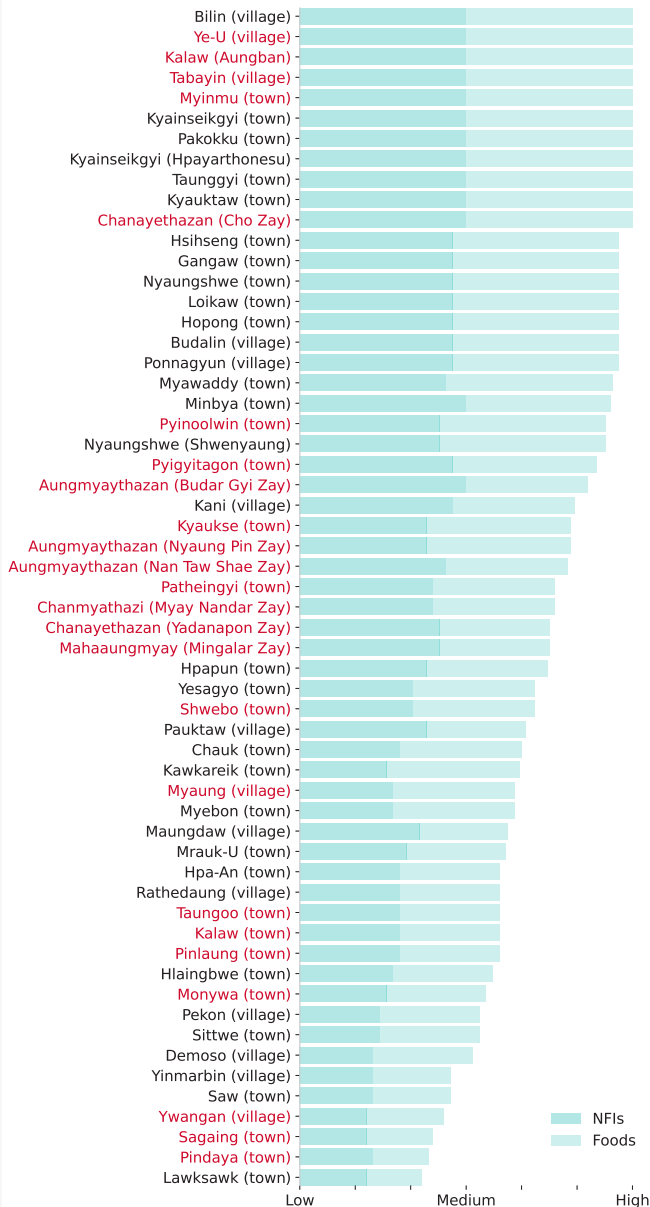
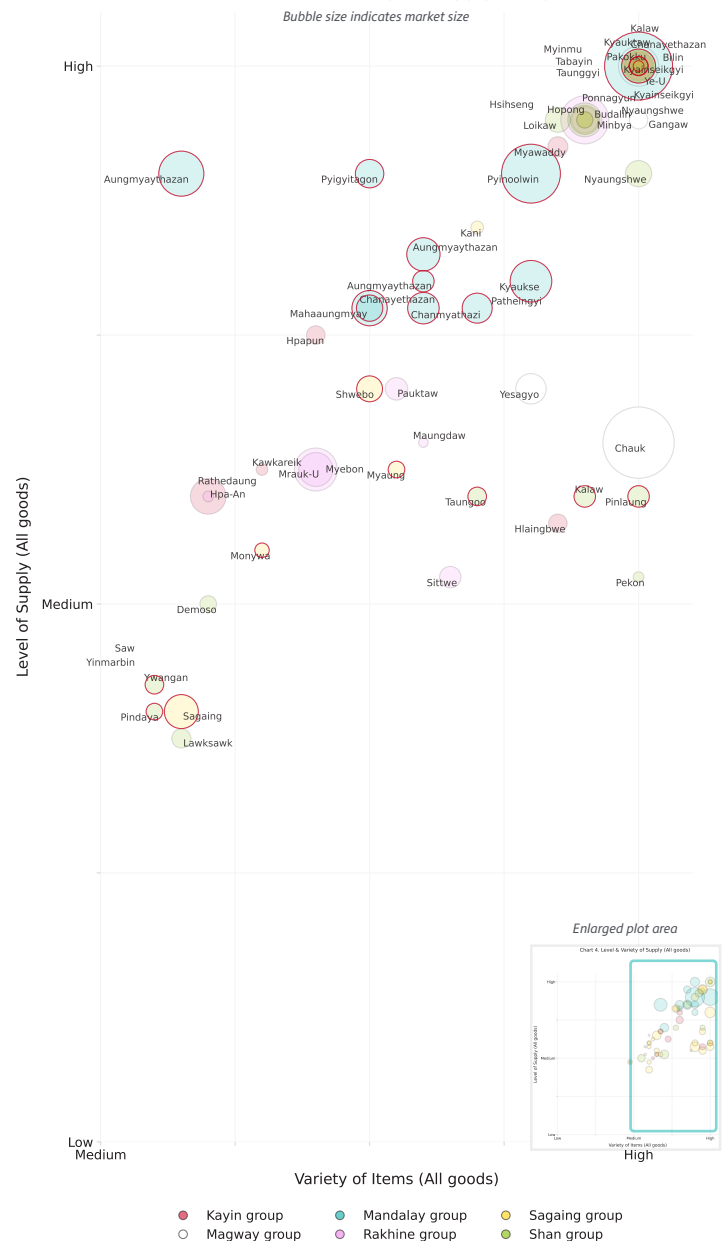
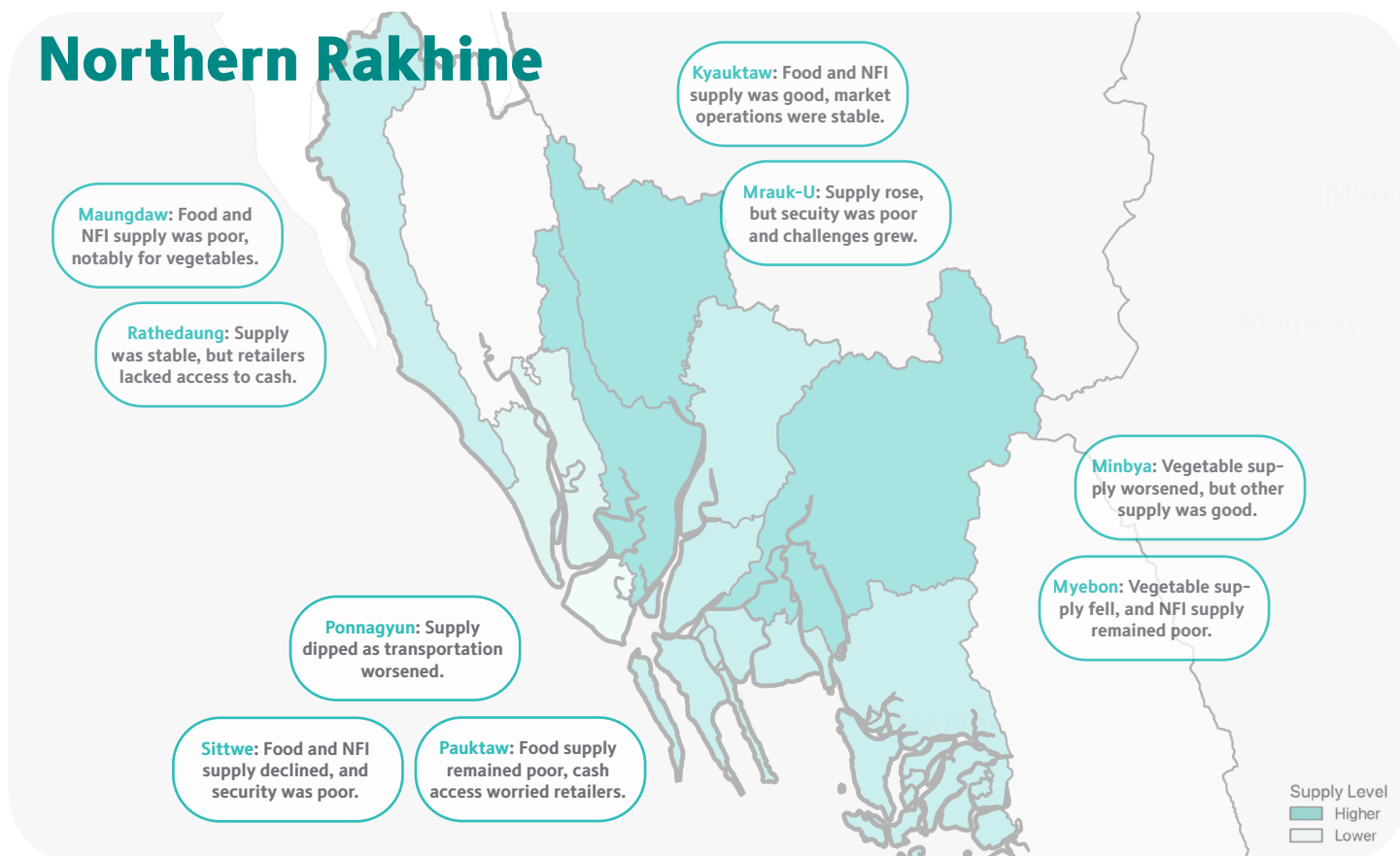


Chart 4. Level & Variety of Supply (All goods)



Northern Rakhine



Market Functionality

Security concerns remained paramount in Rakhine State, and supply improvements were irregular. Trade linkages were intact and market closures remained relatively rare in Rakhine State, but retailers cited a variety of serious retail challenges. Fuel and shelter NFI supply improved, as did supply of essential foods, yet supply remained poor relative to other regions monitored. Retailers in many markets cited challenges, particularly those in **Mrauk-U** where **cash access** and **transportation** were major challenges and in **Myebon** where **security** concerns grew. Shipping costs were generally stable in the region, although a few retailers reported rising shipping costs. Major challenges reported by retailers included limited working capital for purchasing new inventory.

Chart 5.1. Operating Hours, by Market

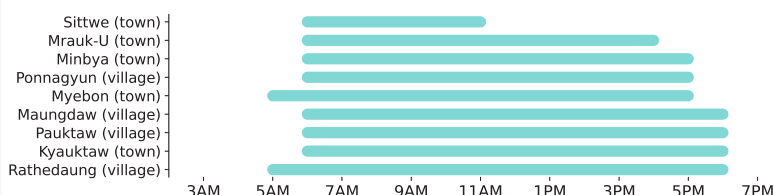


Chart 5.2. Portion of Markets with Closures (Rakhine)

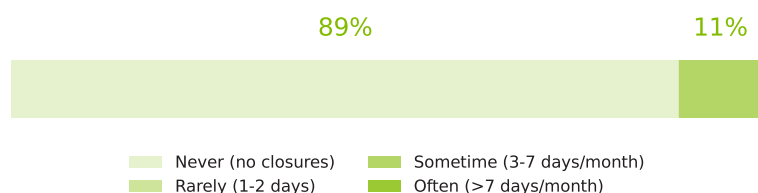


Chart 5.3 Supply, by Region

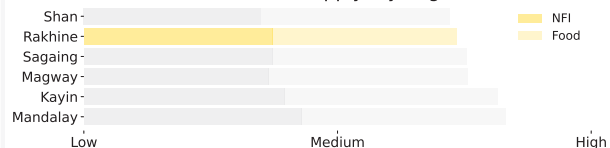


Chart 5.4. Supply, by Category (Rakhine)

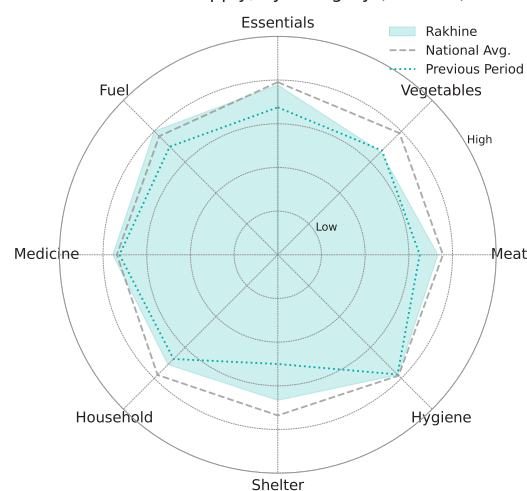
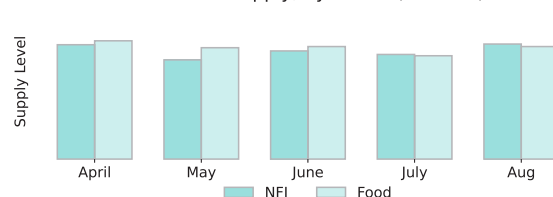
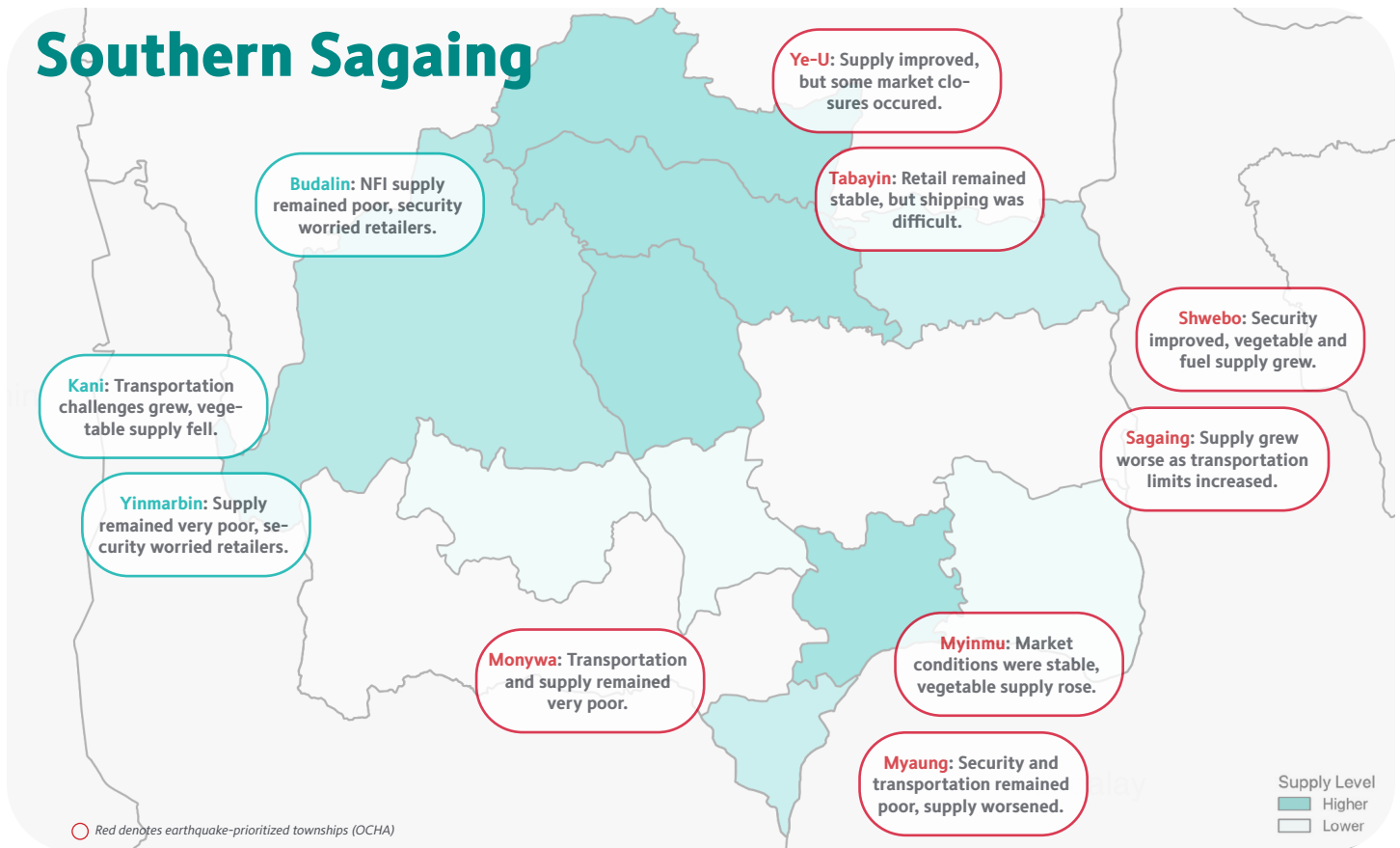


Chart 5.5. Supply, by Month (Rakhine)



Southern Sagaing



Market Functionality

Market conditions were stable and relatively good in Southern Sagaing Region, and closures were relatively rare despite security concerns in/ around some markets. Markets in **Kani**, **Budalin**, **Myaung** continued to face limited trade linkages with other townships, but other townships traded regularly. Retail challenges grew in **Sagaing** where transportation remained curtailed by security forces, but in general fewer retail challenges were reported compared to other regions monitored. NFI supply continued to improve driven by fuel and shelter NFIs, but supply of **household NFIs** worsened. Shipping costs were generally stable according to retailers, but restrictions on **shipping** routes and limitations on permitted goods were major challenges.

Chart 6.1. Operating Hours, by Market

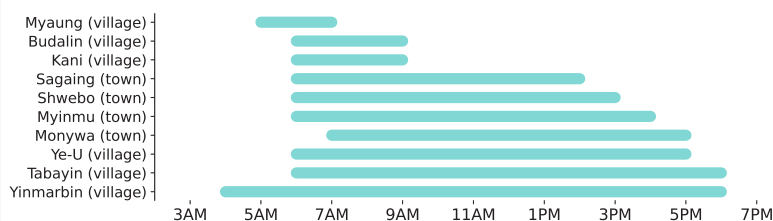


Chart 6.2. Portion of Markets with Closures (Sagaing)

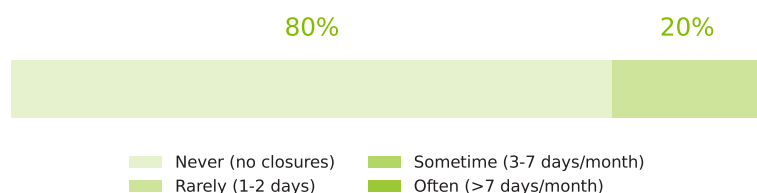


Chart 6.3 Supply, by Region

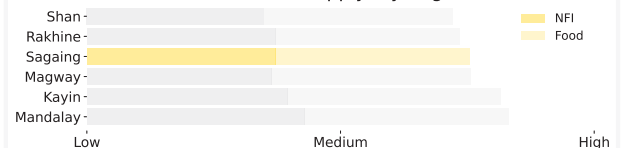


Chart 6.4. Supply, by Category (Sagaing)

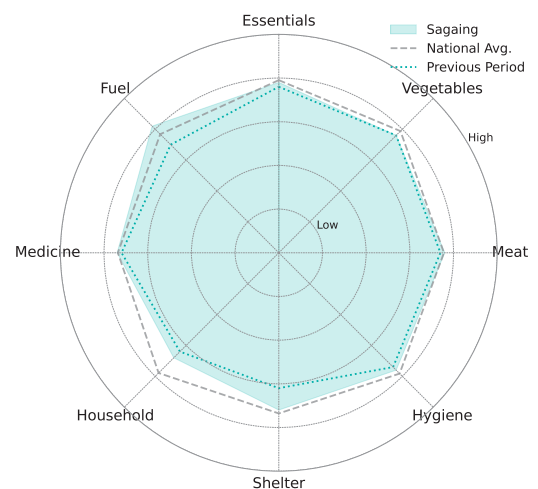
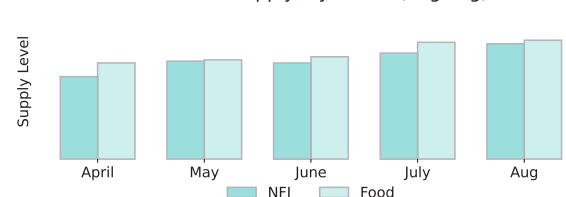
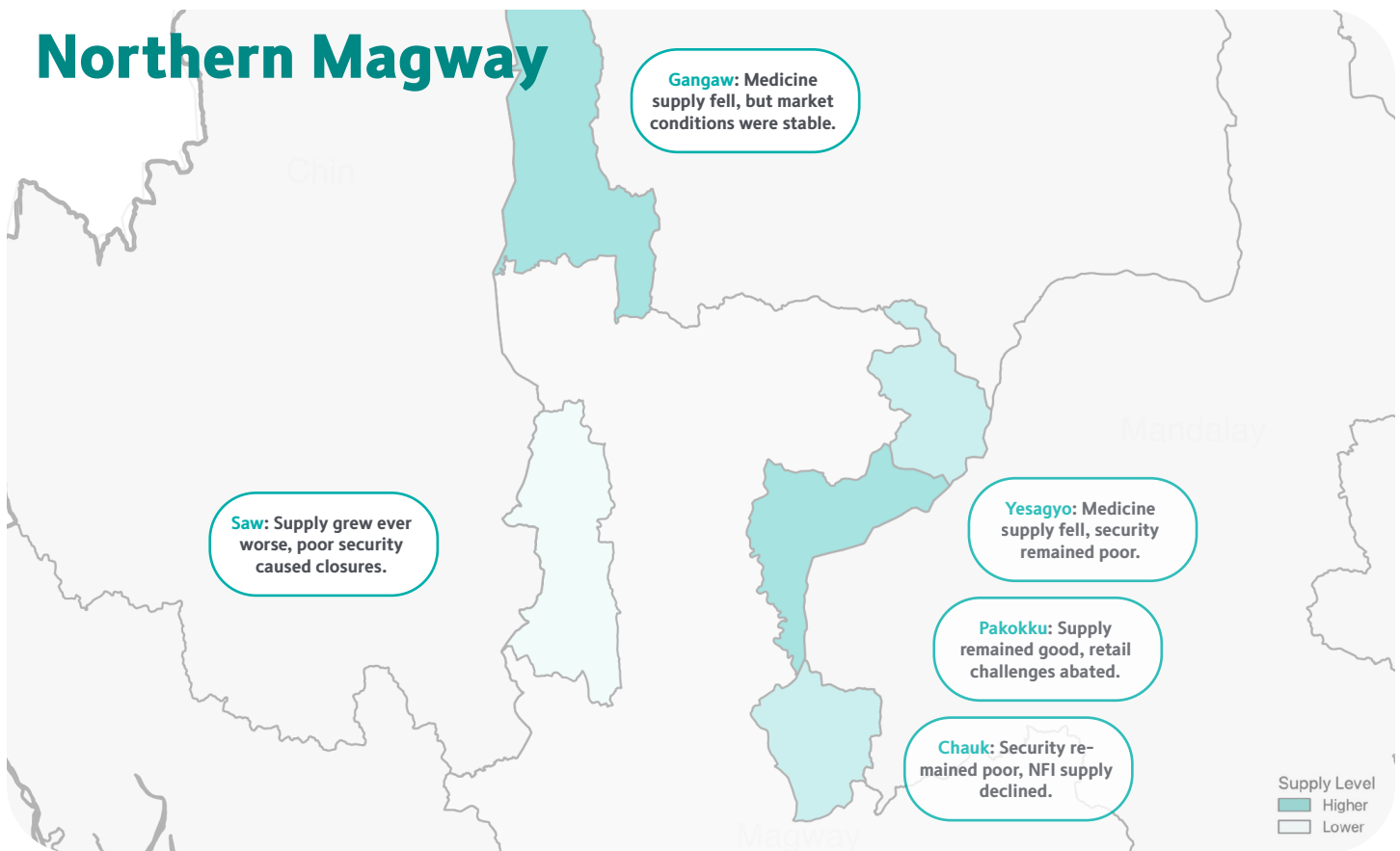


Chart 6.5. Supply, by Month (Sagaing)



Northern Magway



Market Functionality

Market security remained very poor—even relative to other conflict-affected regions—and supply was only moderately better than elsewhere. Closures were fairly rare, but poor **security** disrupted retail. Food and NFI supply contracted somewhat, as supply of **medicines** dropped sharply and supply of **fuel, essential foods** and **shelter** NFIs dipped as well. Concerns among retailers were diverse and included **transportation** difficulties, limited **working capital**, poor **security**, and weak **demand** due to fewer buyers at market. Some retailers reported rising shipping costs while others reported stable shipping costs.

Chart 7.1. Operating Hours, by Market

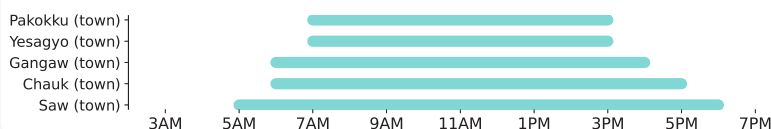


Chart 7.2. Portion of Markets with Closures (Magway)

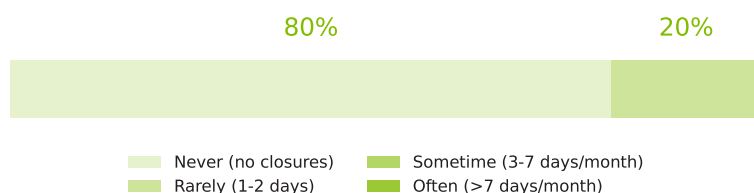


Chart 7.3 Supply, by Region

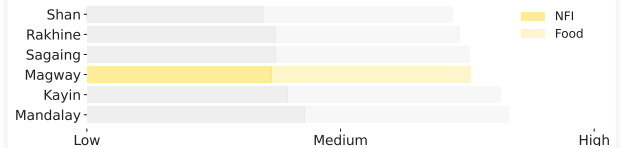


Chart 7.4. Supply, by Category (Magway)

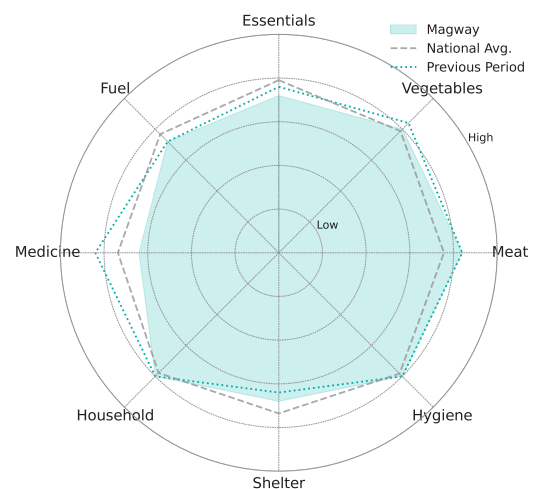
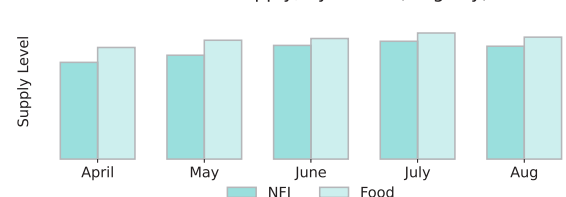
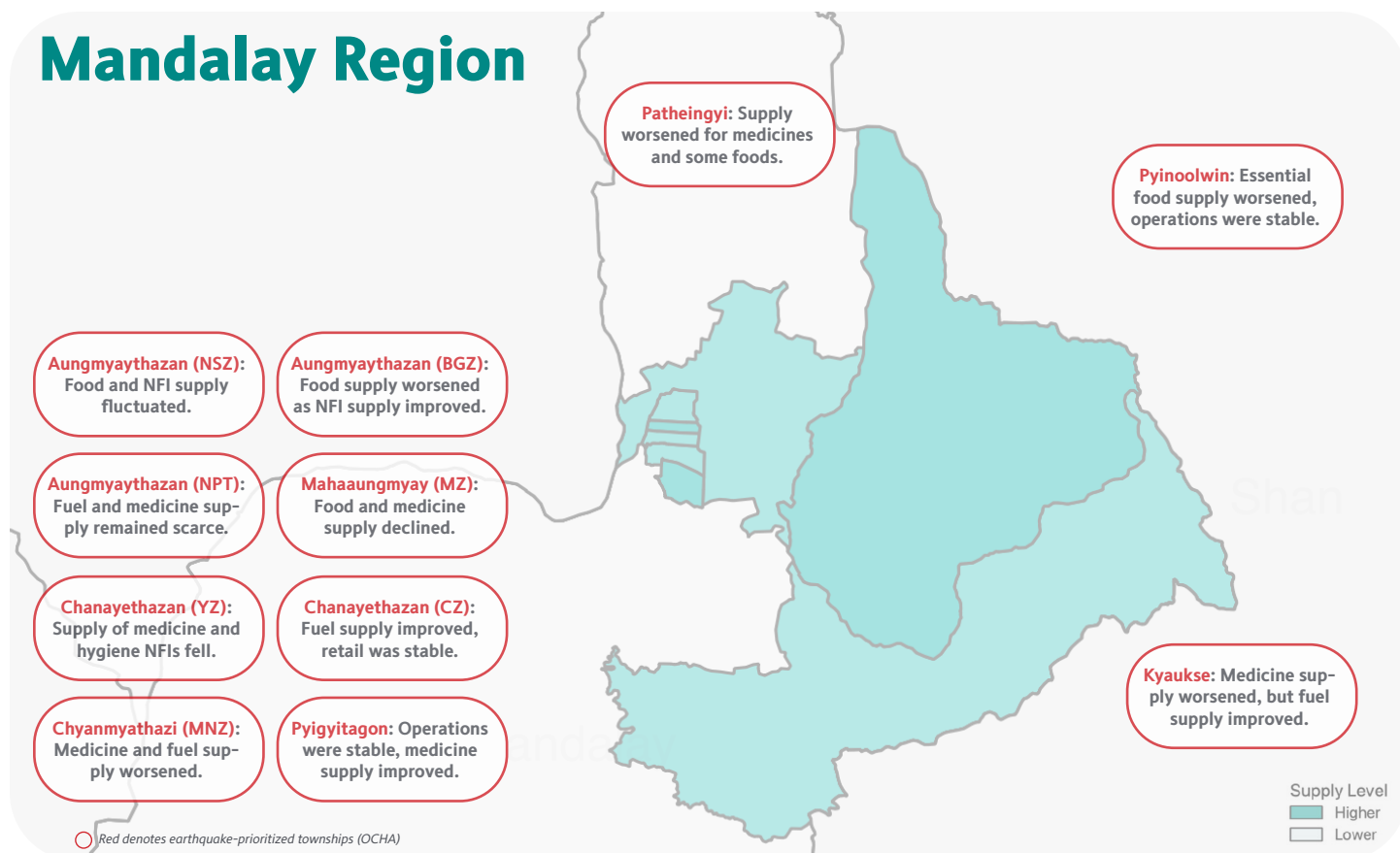


Chart 7.5. Supply, by Month (Magway)



Mandalay Region



Market Functionality

Market operations remained stable, and supply fluctuated with inventory turnover. Market security was generally very good, closures were rare, and linkages between markets were intact. Supply remained better than in other regions monitored, but supply fluctuated at the market-level with some markets seeing food or NFI supply worsen or improve. In general, supply of **medicines** and **essential foods** declined in the region. Retail challenges were few relative to other regions monitored, and they focussed on **transportation** and access to medicine. Retailers reported fairly-stable shipping costs, despite challenges moving goods from suppliers outside Mandalay.

Chart 8.1. Operating Hours, by Market

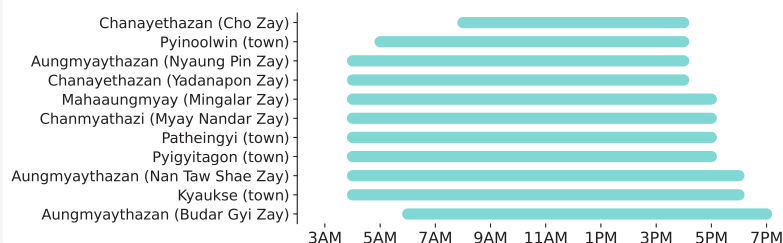


Chart 8.2. Portion of Markets with Closures (Mandalay)

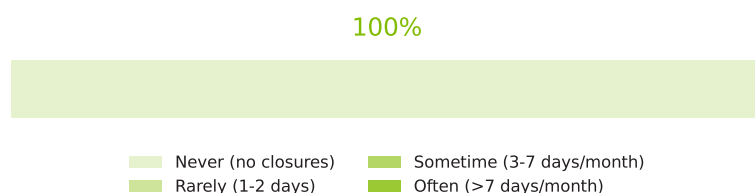


Chart 8.3 Supply, by Region

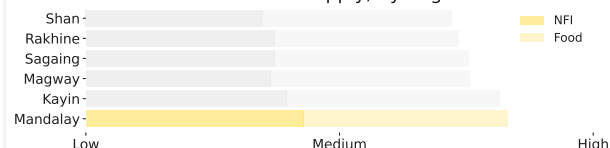


Chart 8.4. Supply, by Category (Mandalay)

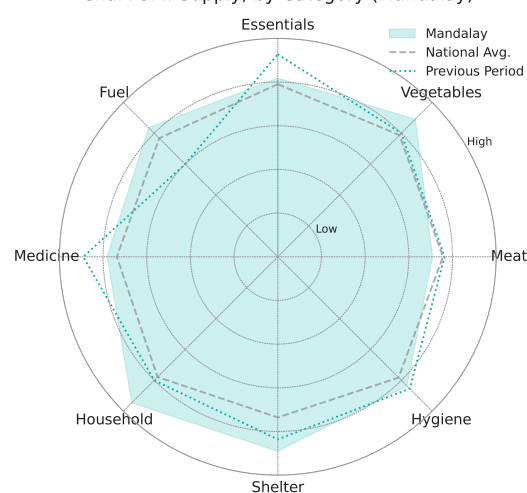
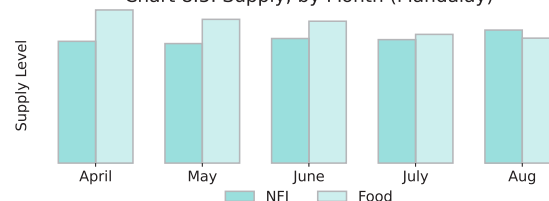
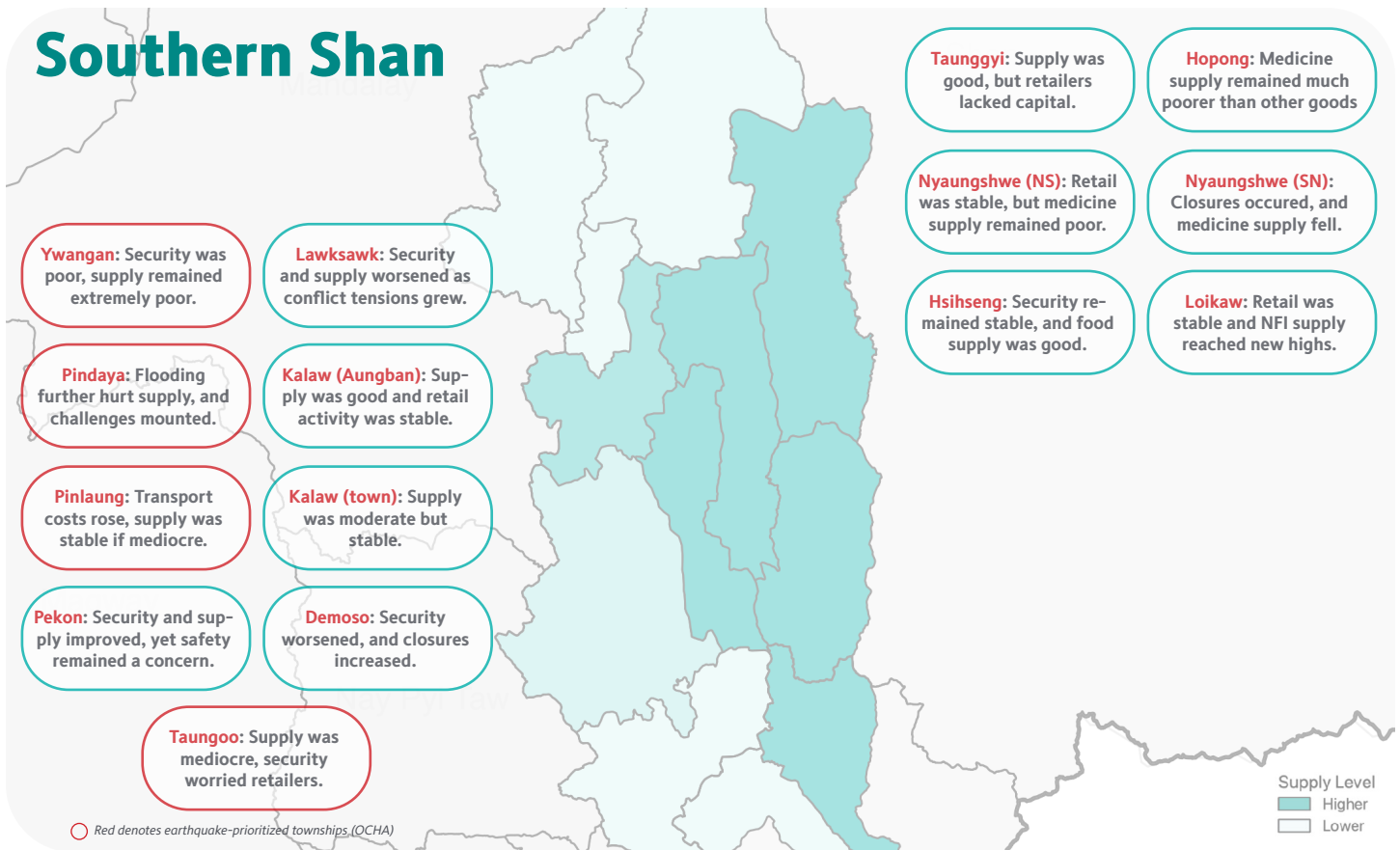


Chart 8.5. Supply, by Month (Mandalay)



Southern Shan



Market Functionality

Retail challenges worsened considerably in the west of the region. Security was stable in/around Loikaw and Hsihseng markets, but it worsened in **Ywangan** and **Lawksawk** due to conflict-related tensions and flooding; some markets saw significant closures. Supply remained stable but poorer than in other regions. Supply of **medicines** was particularly sub-par, yet supply of **fuel** and **hygiene** NFIs declined too. The cost of **shipping** rose across the region.

Chart 9.1. Operating Hours, by Market

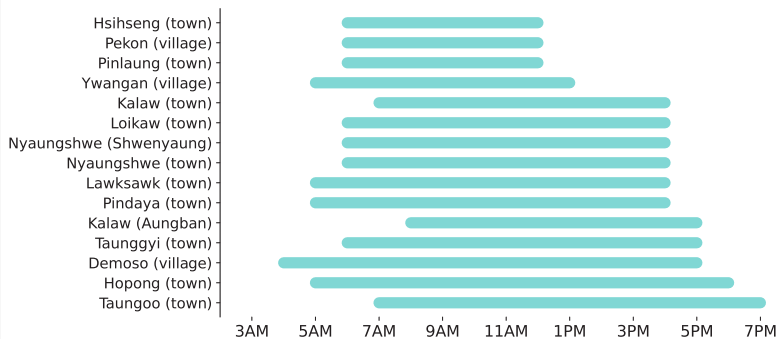


Chart 9.2. Portion of Markets with Closures (Shan)

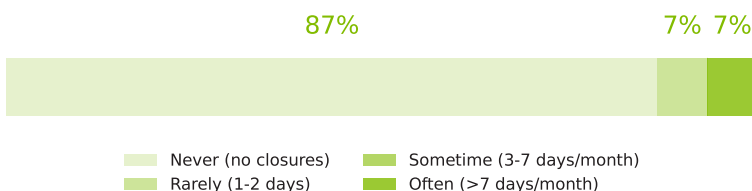


Chart 9.3 Supply, by Region

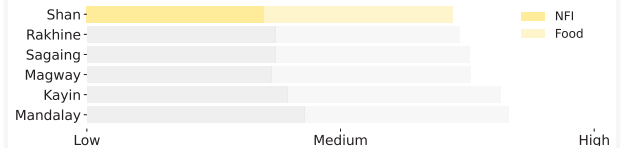


Chart 9.4. Supply, by Category (Shan)

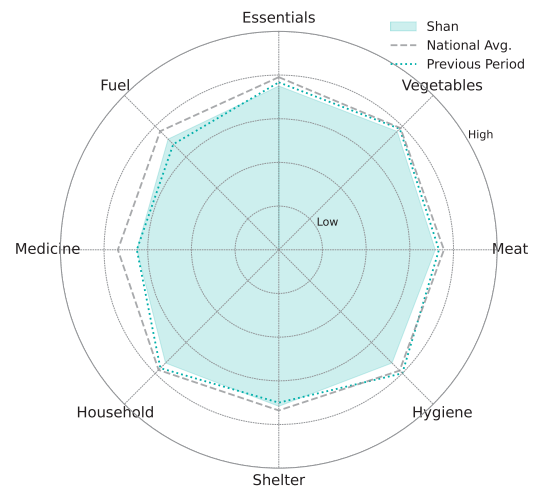
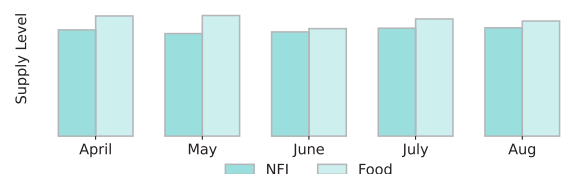
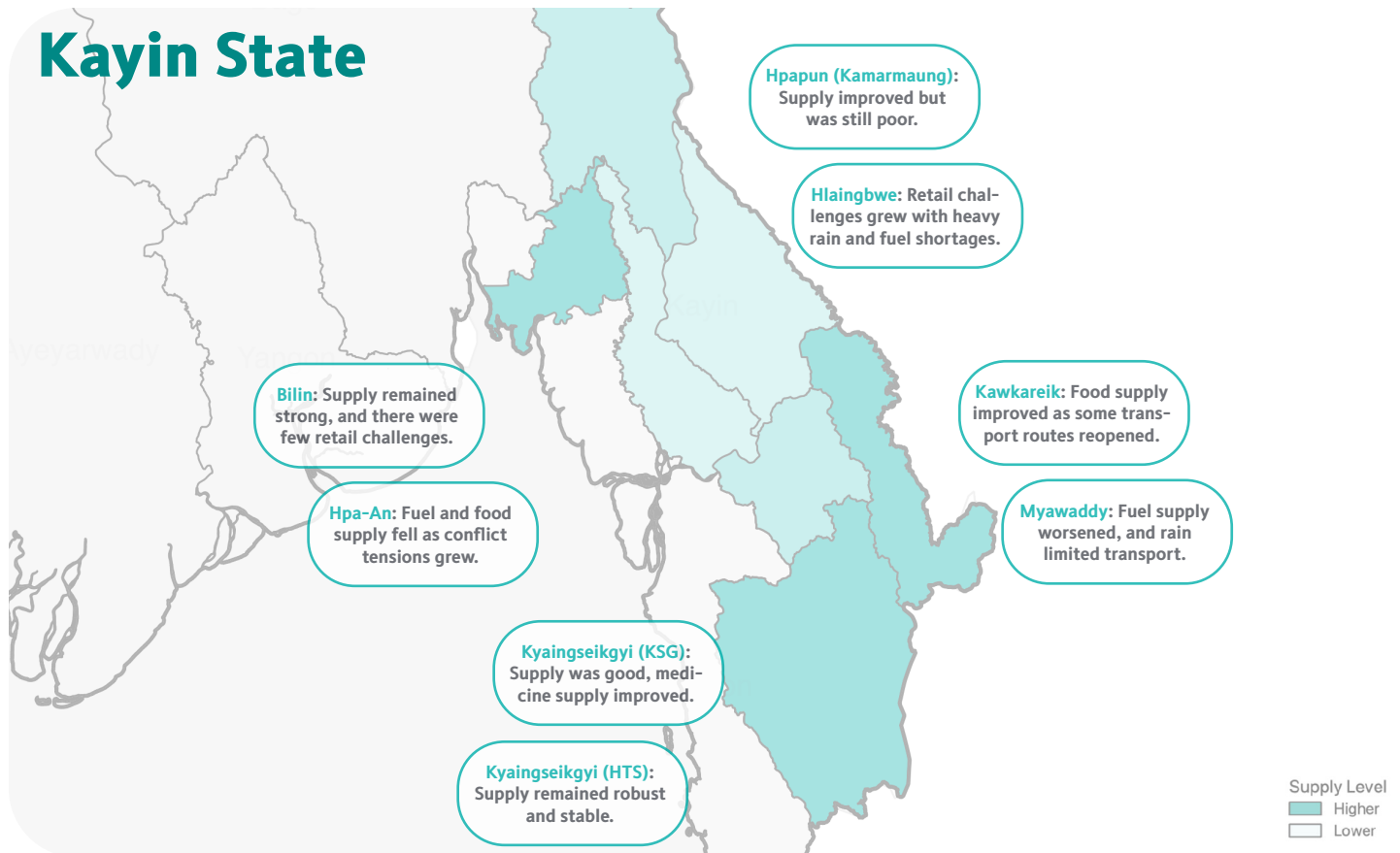


Chart 9.5. Supply, by Month (Shan)



Kayin State



Market Functionality

Market functions improved in Kayin State, but fuel constraints aggravated existing retail challenges. Security and supply improved in some markets like Kawkaireik where shipping linkages improved. Declining **fuel** supply was a major concern for many retailers, and supply of various **NFI**s worsened somewhat in turn. On the other hand, supply of medicines and some essential foods improved a bit, and supply still remained better than in most other regions monitored. Challenges remained numerous, particularly in **Hpapun**, **Hpa-An** and **Hlaingbwe**. **Transportation** costs were widely reported to be rising, and supply and working capital also remained major concerns for retailers. Bilin and Kyaingseikgyi markets remained stable and better-supplied than markets elsewhere in the region.

Chart 10.1. Operating Hours, by Market

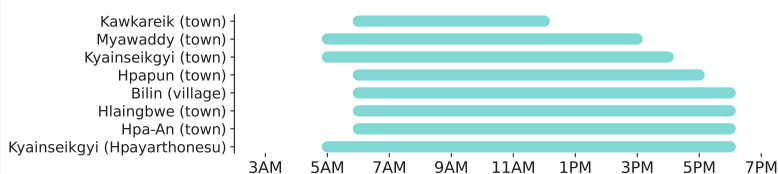


Chart 10.2. Portion of Markets with Closures (Kayin)

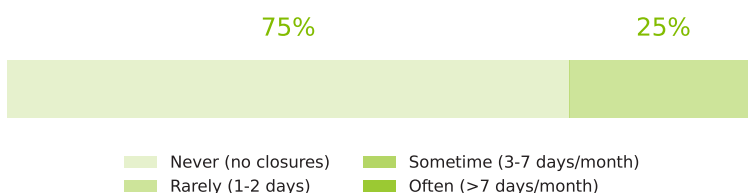


Chart 10.3 Supply, by Region

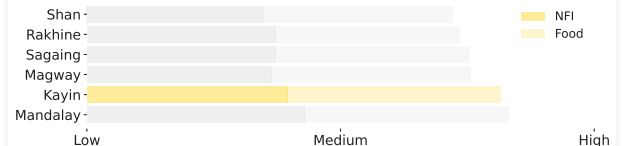


Chart 10.4. Supply, by Category (Kayin)

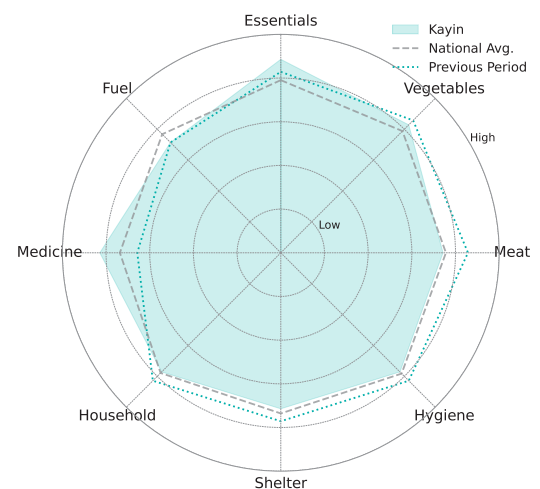
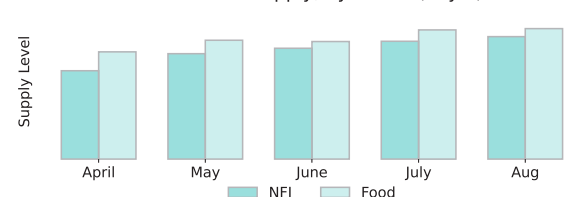


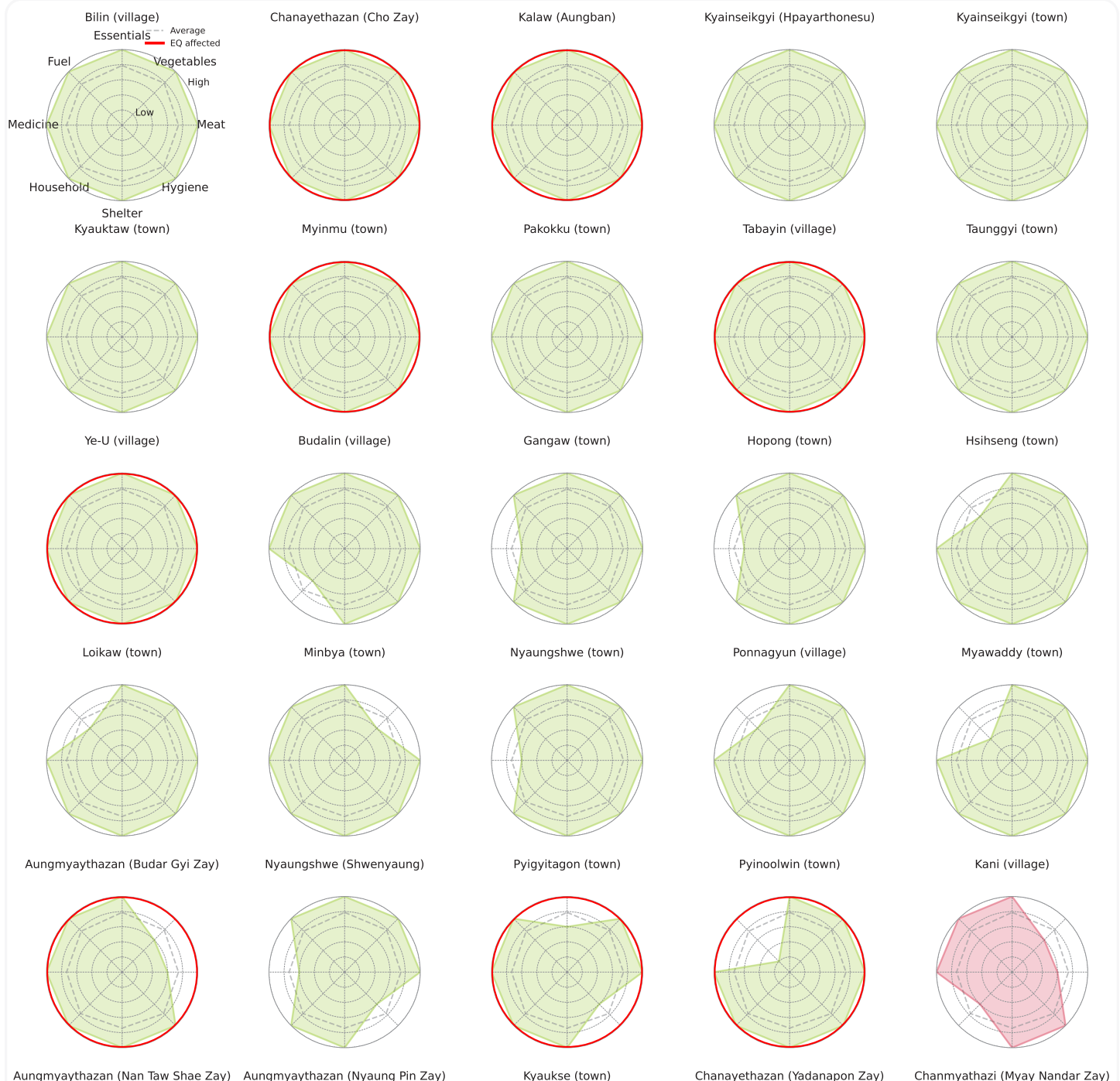
Chart 10.5. Supply, by Month (Kayin)



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 C** - Markets with strong supply of both foods and NFIs. The number of such markets grew in August, driven partly by Southern Sagaing and Rakhine State;
- Group B** - Markets with better-than-average fuel and NFI supply but which lacked food supply. Poor meat/fish supply was a common feature in these markets;
- Group A** - Markets with serious supply deficits but which had moderate supply of at least some foods and which did not suffer the worst NFI supply shortages;
- Group D** - Markets with very poor supply, and especially-poor NFI supply. The number of such markets grew in August, although no one region was the driver.



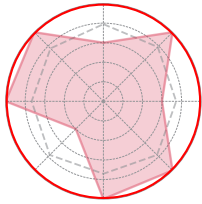
Aungmyaythazan (Nan Taw Shae Zay)

Aungmyaythazan (Nyaung Pin Zay)

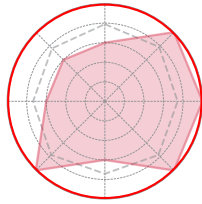
Kyaukse (town)

Chanayethazan (Yadanapon Zay)

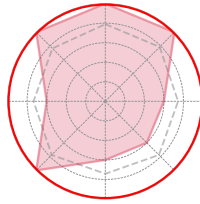
Chanmyathazi (Myay Nandar Zay)



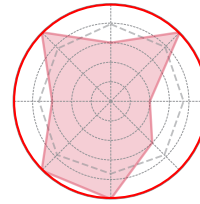
Mahaangmyay (Mingalar Zay)



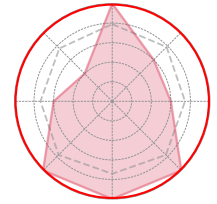
Patheingyi (town)



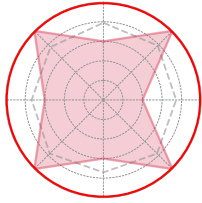
Hpapun (town)



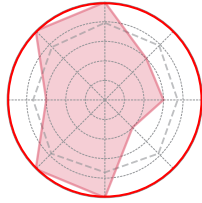
Pauktaw (village)



Shwebo (town)



Yesagyo (town)



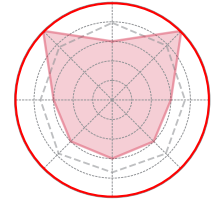
Chauk (town)



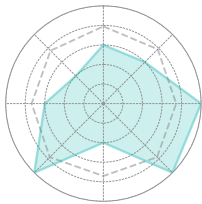
Maungdaw (village)



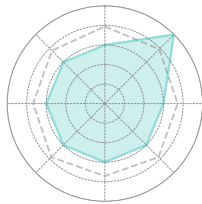
Kawkaik (town)



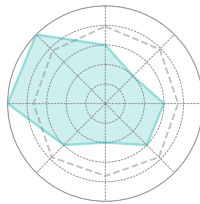
Mrauk-U (town)



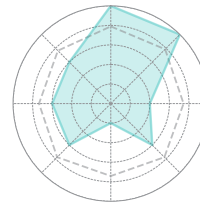
Myaung (village)



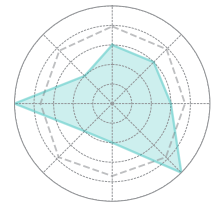
Myebon (town)



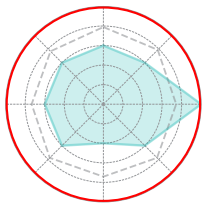
Hpa-An (town)



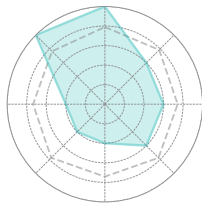
Kalaw (town)



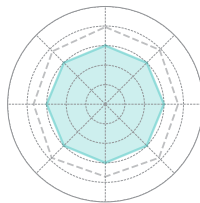
Pinlaung (town)



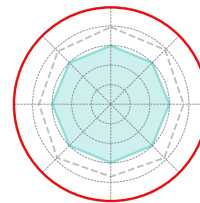
Rathedaung (village)



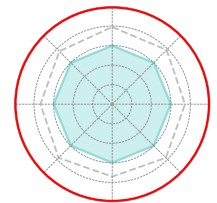
Taungoo (town)



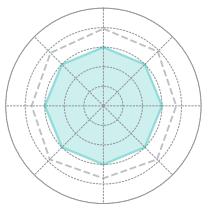
Hlaingbwe (town)



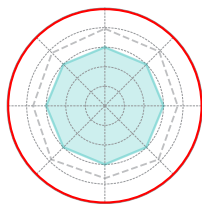
Monywa (town)



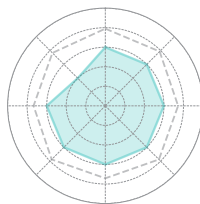
Pekon (village)



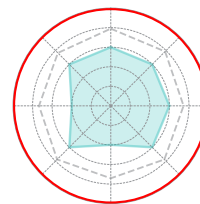
Sittwe (town)



Demoso (village)



Saw (town)



Yinmarbin (village)



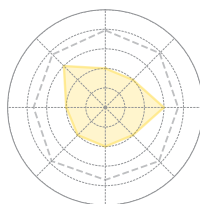
Ywangan (village)



Pindaya (town)



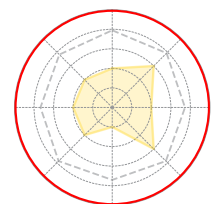
Sagaing (town)



Lawksawk (town)



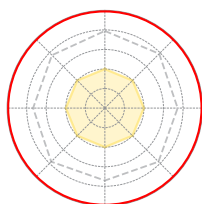
Yinmarbin (village)



Ywangan (village)



Pindaya (town)



Sagaing (town)



Lawksawk (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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