

July 2025

Rapid Market Assessment

This Rapid Market Assessment (RMA) provides data on market function, supply, activity, and logistics in 57 earthquake/non-earthquake markets across 9 states/regions. Data were collected during July 21–25 through observation and KIIs with 117 retailers. Reports available at www.themimu.info/market-analysis-unit.



KEY FINDINGS

- **Markets were open in July and trade links were intact**, and market closures were fewer than in recent months;
- **Security was still very poor in certain markets**, and it worsened in some Rakhine and Sagaing markets;
- **Supply declined in Rakhine and Mandalay in July**, but it improved slightly in other regions;
- **Rakhine markets still faced the toughest conditions**, with declining food and NFI supply and dubious security;
- **Food supply declined in Mandalay**, although overall supply remained better there than elsewhere;
- **Supply improved in Kayin, especially for foods**, yet market conditions in Kawkaireik remained dire;
- **Medicine and hygiene NFI supply improved in July**, and overall NFI supply improved slightly;
- **In Sagaing shipping and trade linkages were tenuous**, although supply improved in July from a very low level.

Overview

Overall market conditions were relatively good in July compared to past monsoon seasons. Markets were open in July and trade continued, but poor security in Rakhine, Sagaing and Magway pointed toward possible future disruptions. Supply was generally stable, including for hygiene NFIs, but food supply dipped in both Mandalay and Rakhine. Supply improved in Sagaing and Kayin, despite continuing challenges in markets like Kawkaireik, Myaung and Shwebo. Shipping costs were generally stable, but retailers worried about rising transportation costs due to checkpoints and poor security making it considerably more difficult to move goods between townships.

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

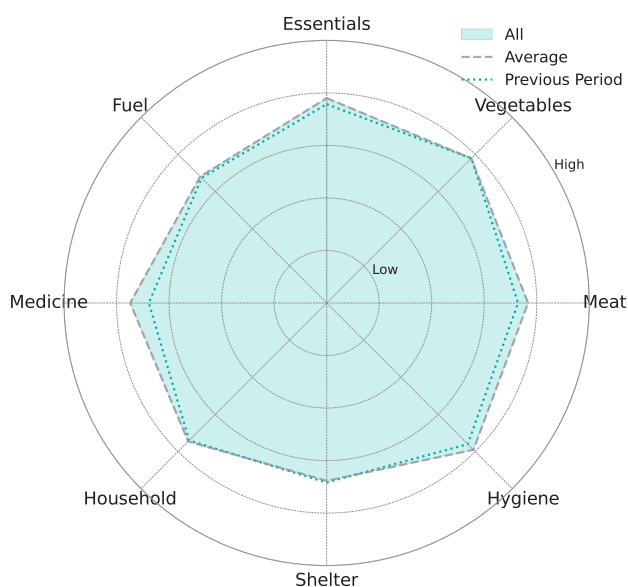
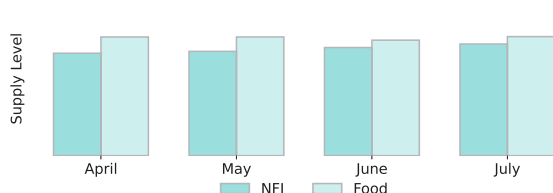


Chart 1.2. Supply, by Month (Township Avg.)



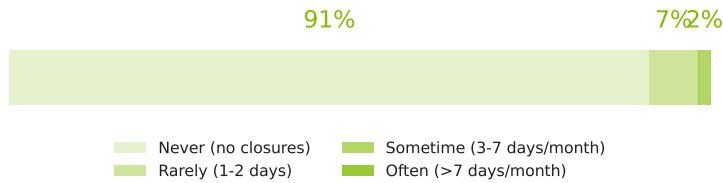
What to Watch

- Market conditions could worsen in **Shwebo, Monywa, Pauktaw** and **Saw**, where security declined;
- Signs of rising **shipping** costs due to transportation hurdles could increase if security does not improve;
- Supply of **hygiene** NFIs may be holding up better than in past monsoon seasons;
- Supply of **fuel** and **shelter** NFIs remain critical items to watch, particularly as Thai border trade tightens.

Market Functionality

There were fewer market closures in July compared to June, and trade linkages between towns and villages remained intact (**Chart 2**). However, the number of markets with poor security conditions grew slightly, most often in Rakhine and Sagaing.

Chart 2. Portion of Markets with Closures (All)



26% Markets described as "unsafe" or "very unsafe."
0% Markets reporting recent damage.

98% Markets serving nearby villages.
82% Markets serving serving nearby townships.

Supply of Goods

At the township-level, supply improved in July more often than it worsened (**Chart 3**). This was particularly true for supply of food items, as food supply rose more often in townships than it fell. The picture was a little more balanced for NFIs with an equal number of markets seeing improved or worsened NFI supply. Markets like Kalaw, Maungdaw and Tabayin saw the most improvement in supply in July, while those in Pekon, Ywangan and Kawkareik saw the largest declines (**Chart 4**).

Chart 3. Supply of Foods and NFIs

Red denotes Earthquake-prioritized townships (OCHA)

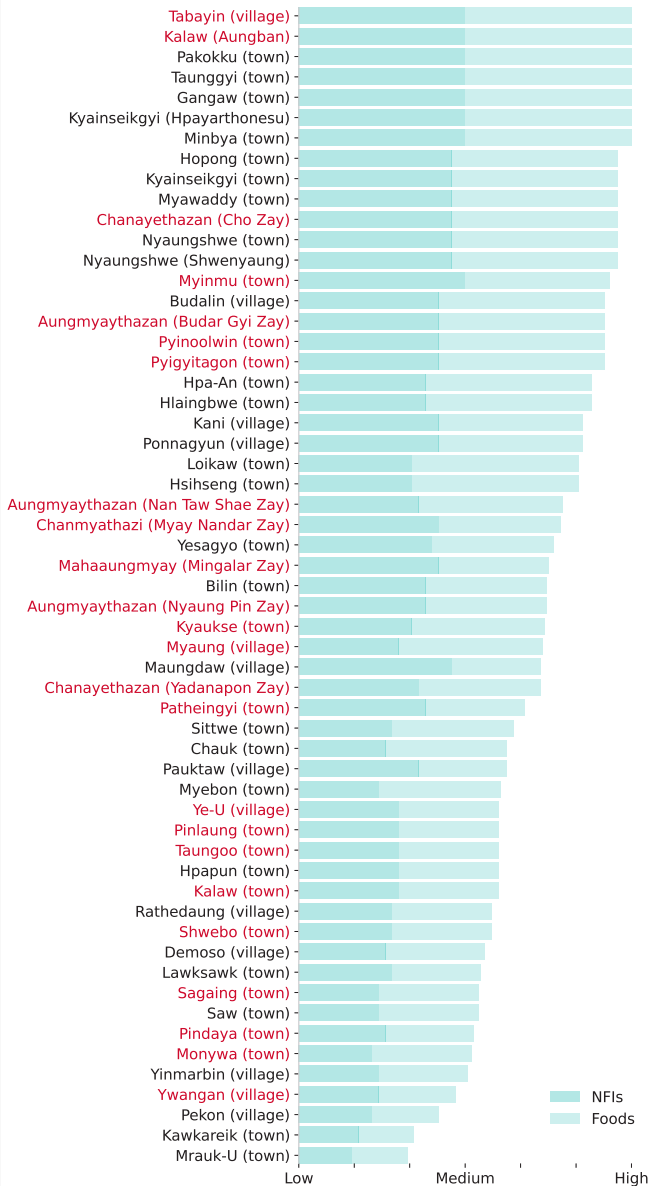
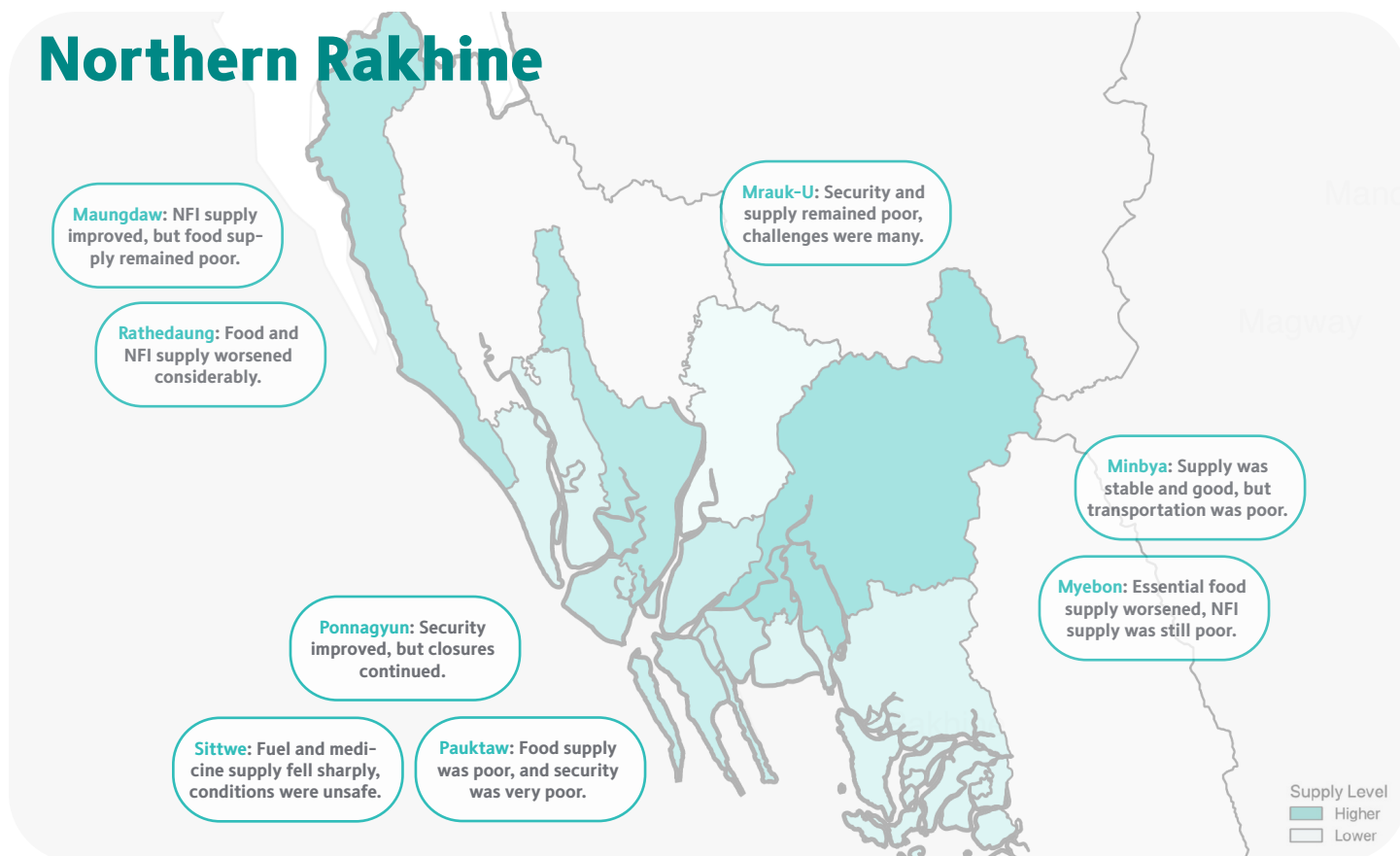


Chart 4. Level & Variety of Supply (All goods)

Bubble size indicates market size



Northern Rakhine



Market Functionality

Rakhine State continued to face the most troubling market conditions in July. **Security** was poor in Mrauk-U, Pauktaw and Sittwe, although it was better elsewhere. Only Ponnagyun faced occasional market closures, and market hours were mostly regular. **Sittwe** and **Maungdaw** markets faced limited trade links with neighboring markets, but most others markets did not. Food and NFI supply declined in July, particularly for **essential foods**, **fuel** and **shelter** NFIs; **food** supply remained considerably poorer than other regions monitored. Retailer challenges remained significant and diverse, including poor **transportation**, lack of access to supply, poor security, and poor cash access. Retailers in Myebon and Mrauk-U reported the most challenges, and numerous retailers reported rising **shipping** costs in July.

Chart 5.1. Operating Hours, by Market

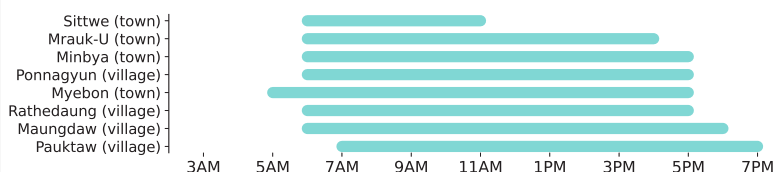


Chart 5.2. Portion of Markets with Closures (Rakhine)

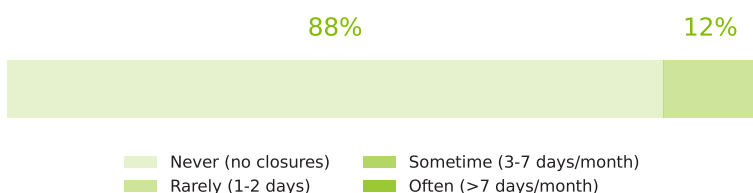


Chart 5.3 Food & NFI Supply, by Region

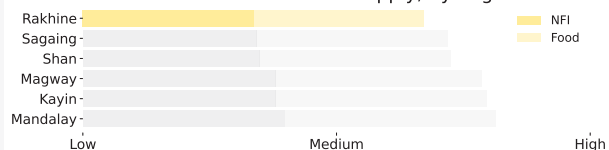


Chart 5.4. Supply, by Category (Rakhine)

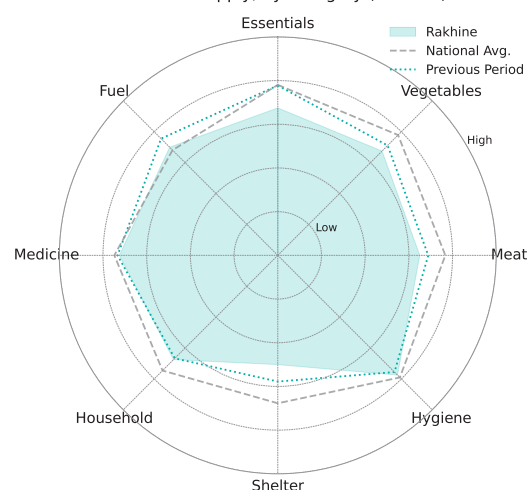
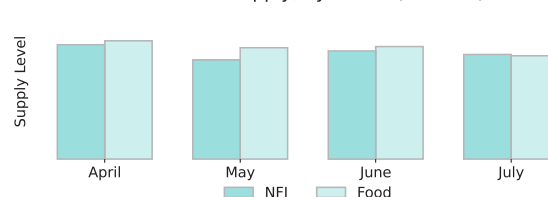
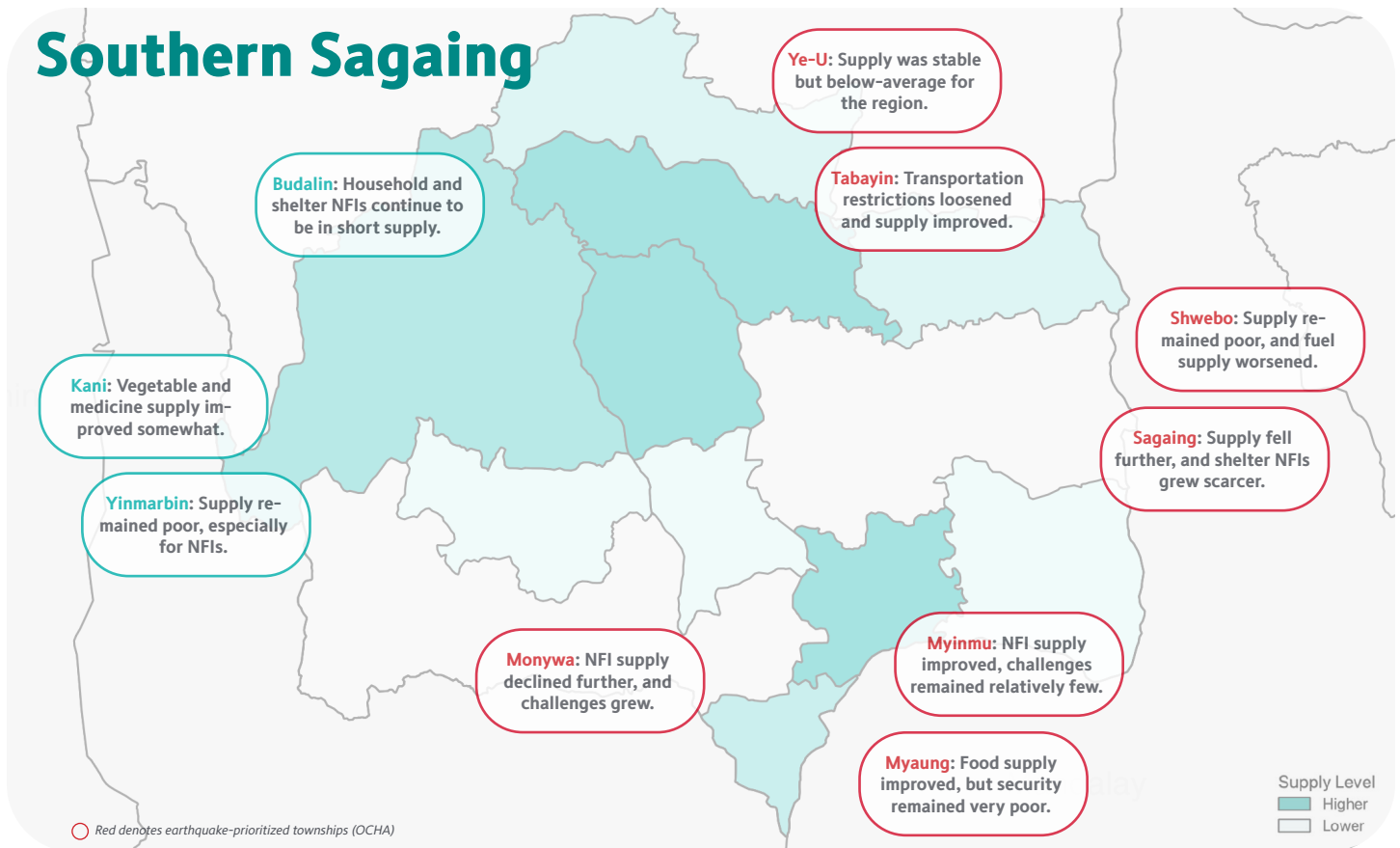


Chart 5.5. Supply, by Month (Rakhine)



Southern Sagaing



Market Functionality

Market conditions were stable in Southern Sagaing Region, although some townships still faced challenging conditions. Half of all markets monitored saw limited **trade links** with neighboring townships, and market **security** remained poor in Monya, Myaung and Shwebo; Shwebo also saw some market closures. Food and NFI supply improved in July, but it remained poorer than most other regions monitored. Fuel and hygienic NFI supply were stable, but all other product categories saw supply improvements in July. Retailers in nearly all markets monitored reported more challenges in July than in June, often related to **transportation**, security and checkpoints; nonetheless, shipping costs remained generally stable in July.

Chart 6.1. Operating Hours, by Market

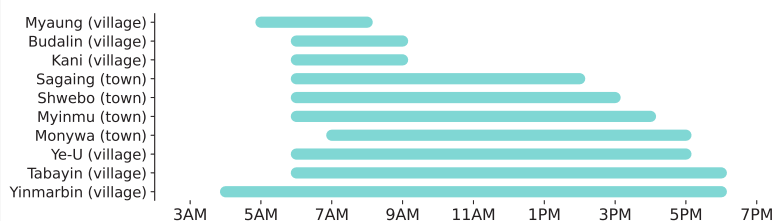


Chart 6.2. Portion of Markets with Closures (Sagaing)

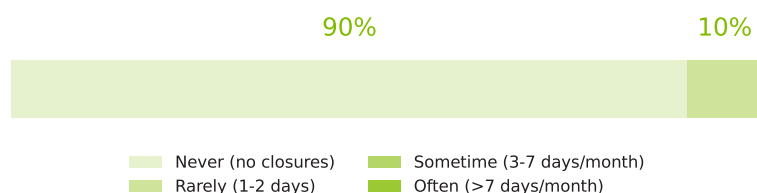


Chart 6.3 Food & NFI Supply, by Region

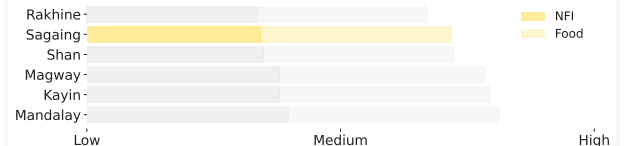


Chart 6.4. Supply, by Category (Sagaing)

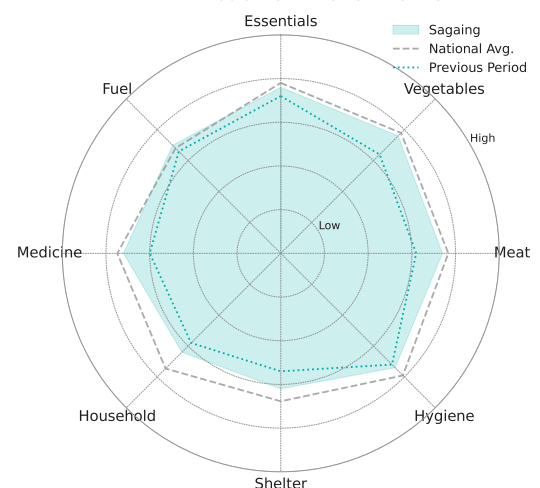
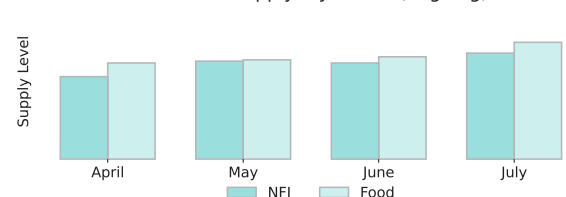
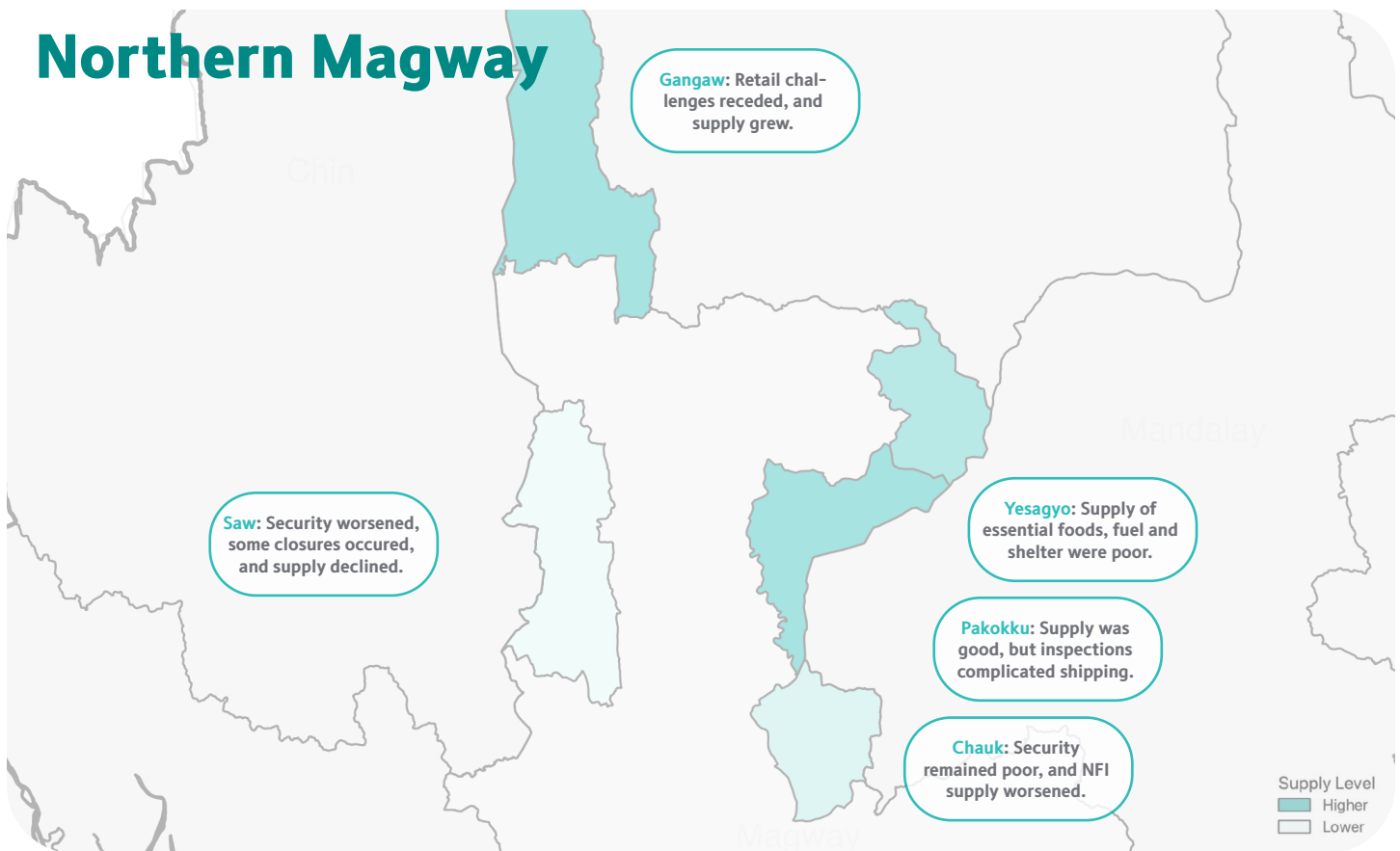


Chart 6.5. Supply, by Month (Sagaing)



Northern Magway



Market Functionality

Markets were open in Northern Magway Region and linkages were intact, but security was poorest here of the regions monitored. Market closures were rare and hours remained stable, but **security** was poor in four-of-five markets monitored. Food and NFI supply was stable in July, and overall supply was better than other regions, but this was due in part to the inability to monitor in some more-troubled markets like Pauk. Supply of medicine and hygiene NFIs improved in July, while supply of **shelter** NFIs worsened. Retailers reported more challenges in July compared to the previous month, and **Pakokku** retailers in particular faced many challenges such as limited **cash** or working capital and difficult **transportation** due to checkpoints. Shipping costs were generally stable, although some retailers reported rising shipping rates and long lead-times.

Chart 7.1. Operating Hours, by Market

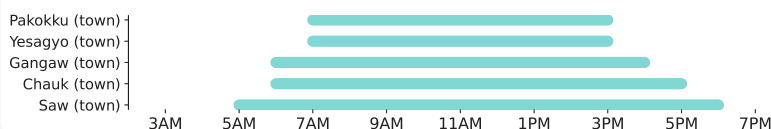


Chart 7.2. Portion of Markets with Closures (Magway)

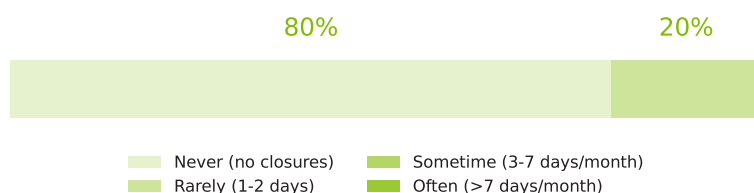


Chart 7.3 Food & NFI Supply, by Region

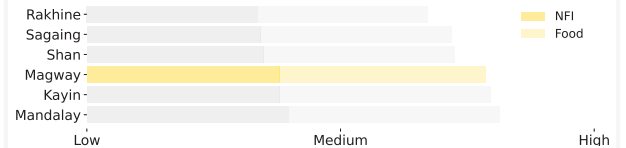


Chart 7.4. Supply, by Category (Magway)

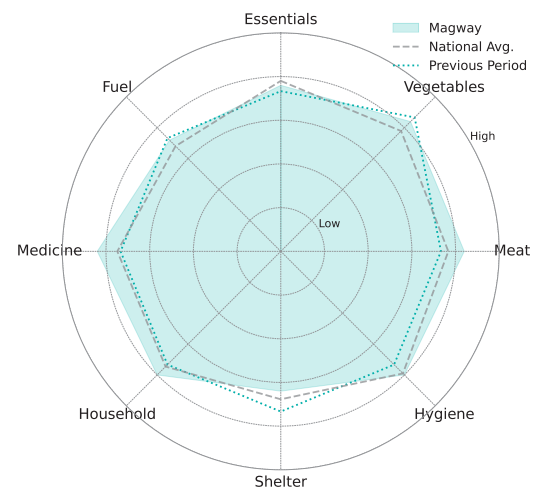
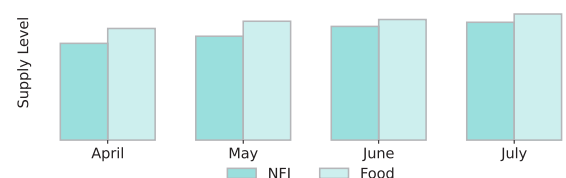
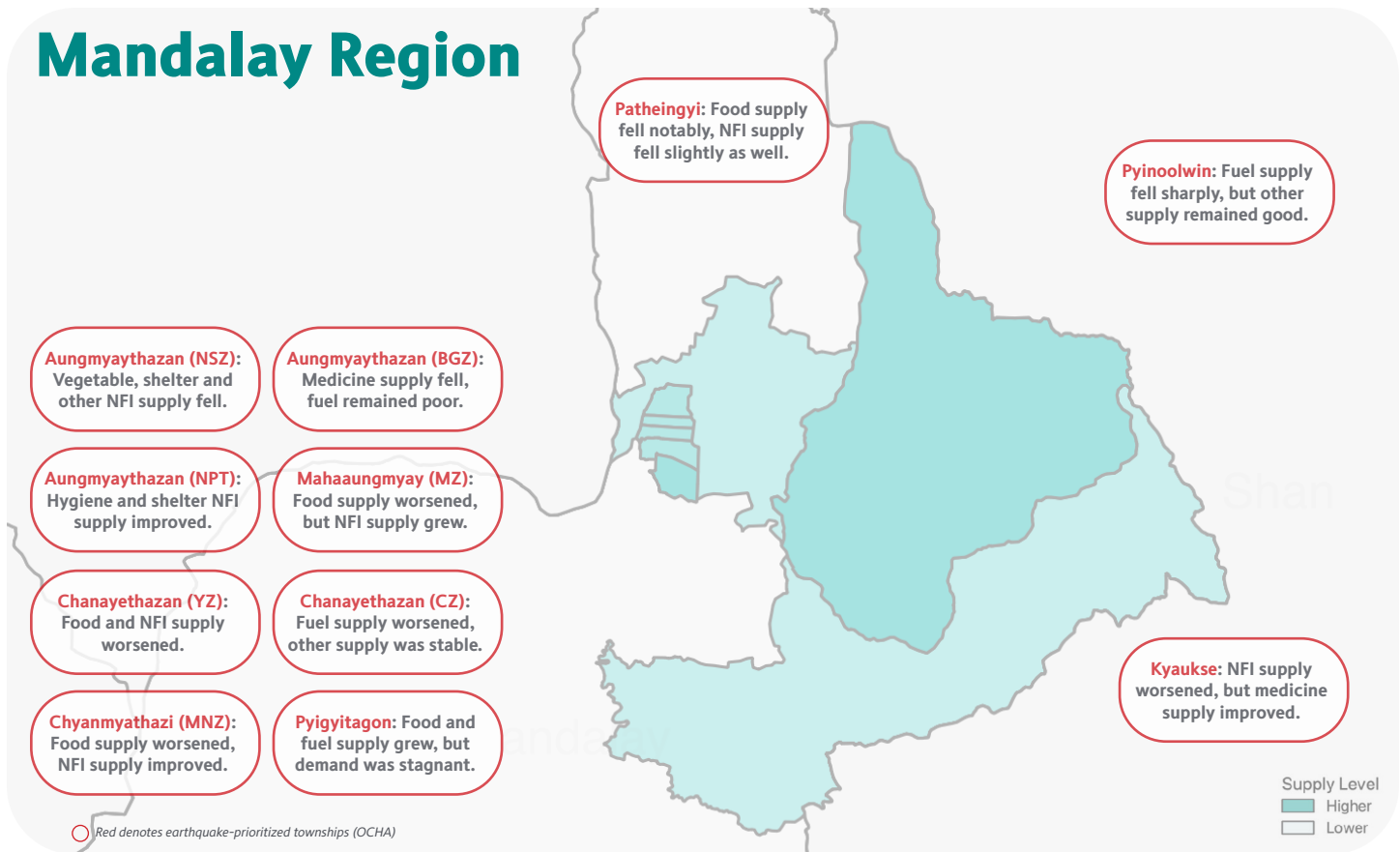


Chart 7.5. Supply, by Month (Magway)



Mandalay Region



Market Functionality

Markets remained operational in Mandalay Region with generally-safe conditions and no market closures reported. NFI supply was stable and medicine supply improved, but food supply worsened as **meat** and **vegetable** inventories fell from previously very-high levels. Supply remained better in Mandalay than elsewhere, but **food** supply trended downward in recent months, likely in part due to transportation challenges. Retailers still reported fewer challenges than those elsewhere, but they worried about road closures, poor fuel access and weak **demand**. **Shipping** costs remained fairly stable, but retailers reported rising shipping costs in some townships.

Chart 8.1. Operating Hours, by Market

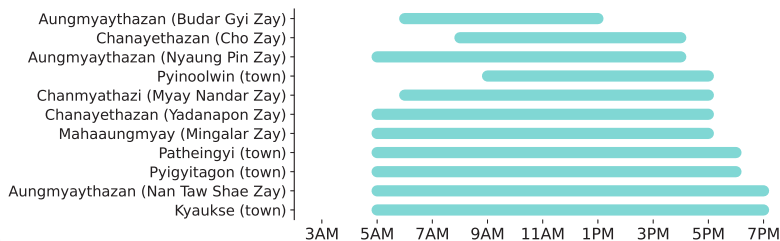


Chart 8.2. Portion of Markets with Closures (Mandalay)

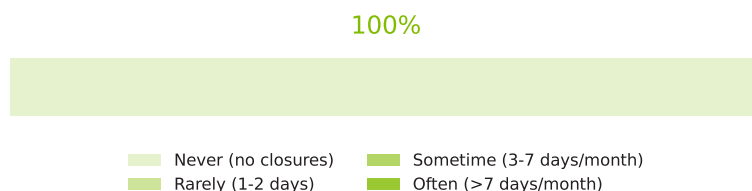


Chart 8.3 Supply, by Region

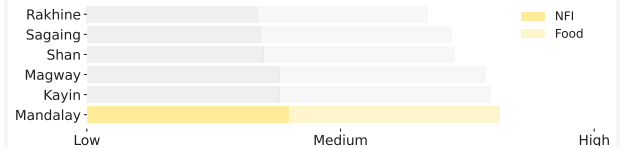


Chart 8.4. Supply, by Category (Mandalay)

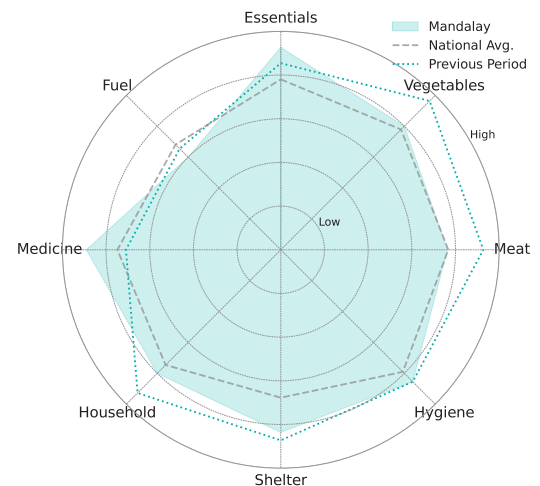
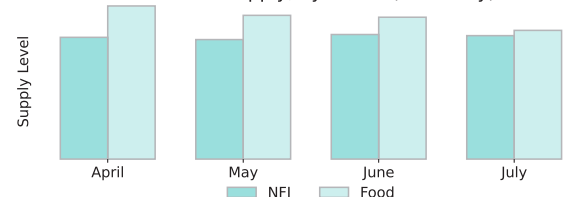
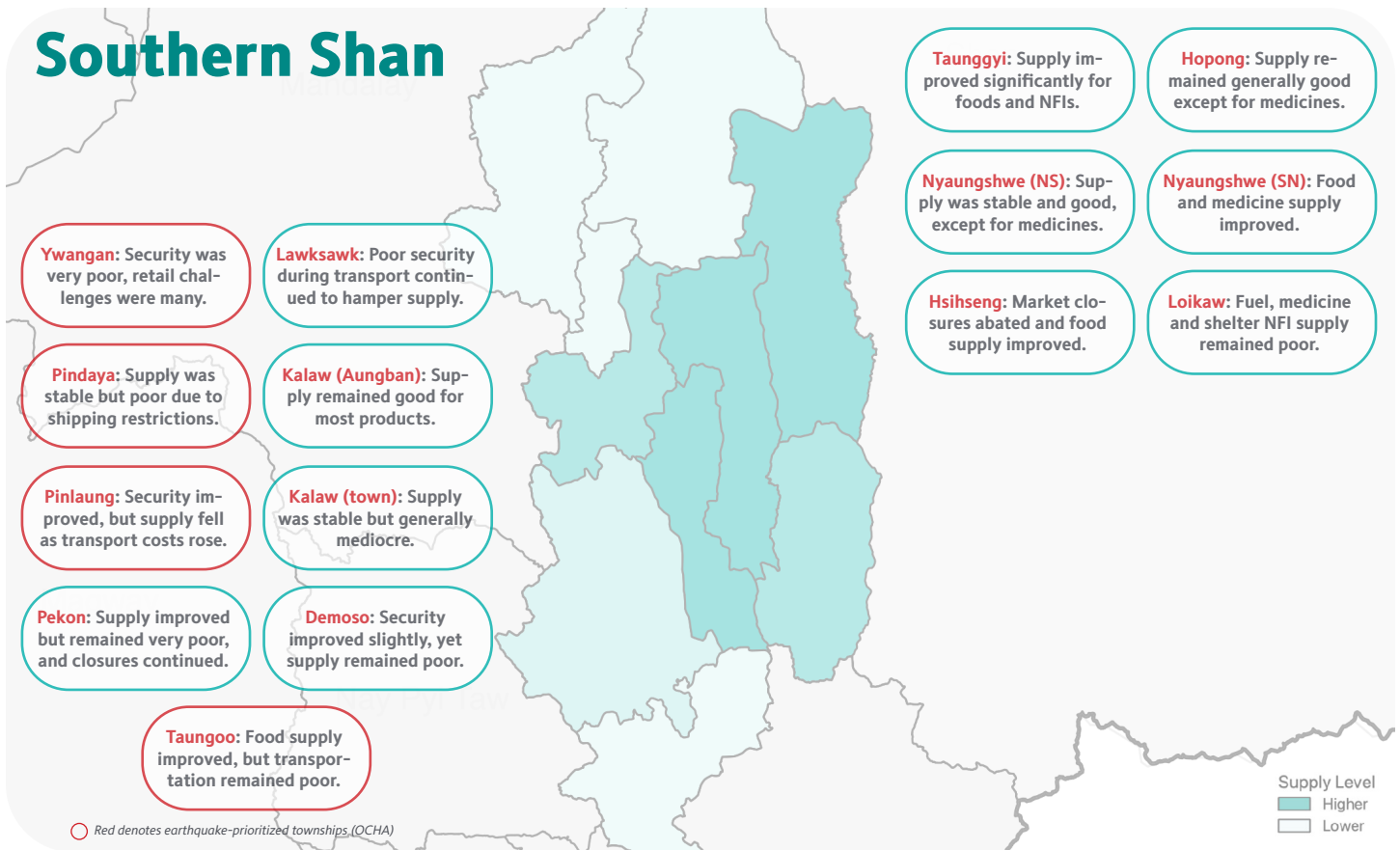


Chart 8.5. Supply, by Month (Mandalay)



Southern Shan



Market Functionality

Markets remained operational in Southern Shan state as security conditions improved slightly and closures remained rare. However security remained poor in/around **Pekon**, **Demoso** and **Ywangan** markets, and Pekon saw occasional closures. Retailers there as well as in Pindaya and Lawksawk continued to face challenges, and **shipping** costs rose in many markets. Supply improved for **essential foods, medicine** and **fuel**, yet it remained average compared to other regions monitored.

Chart 9.1. Operating Hours, by Market

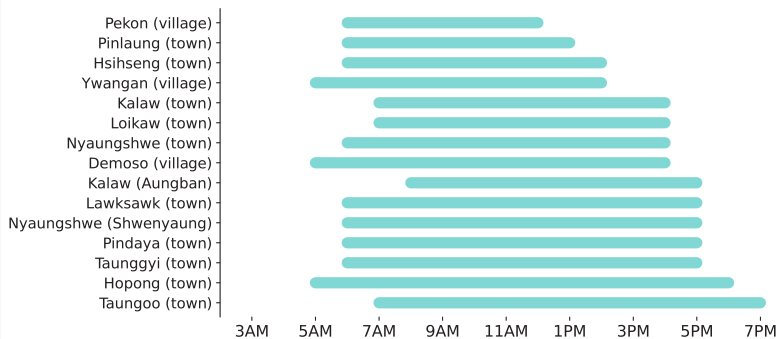


Chart 9.2. Portion of Markets with Closures (Shan)

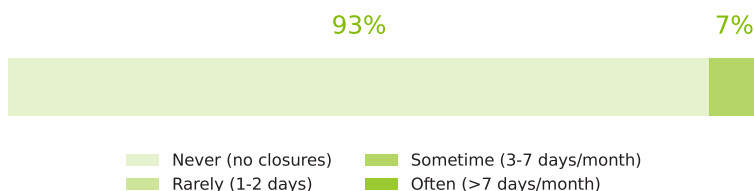


Chart 9.3 Food & NFI Supply, by Region

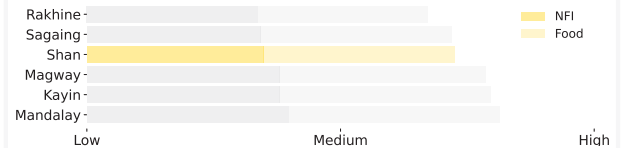


Chart 9.4. Supply, by Category (Shan)

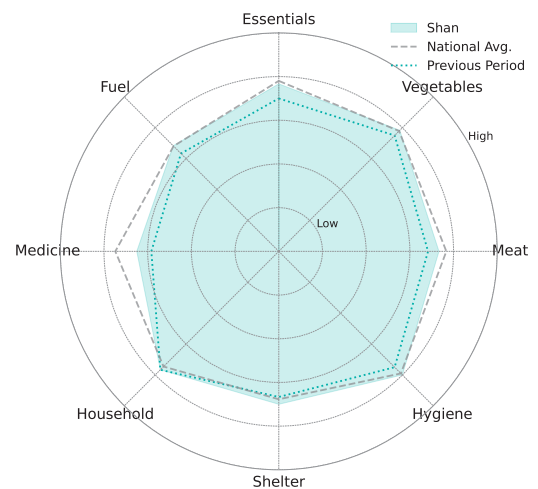
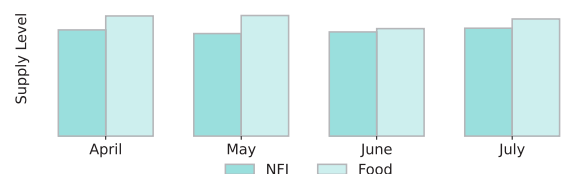
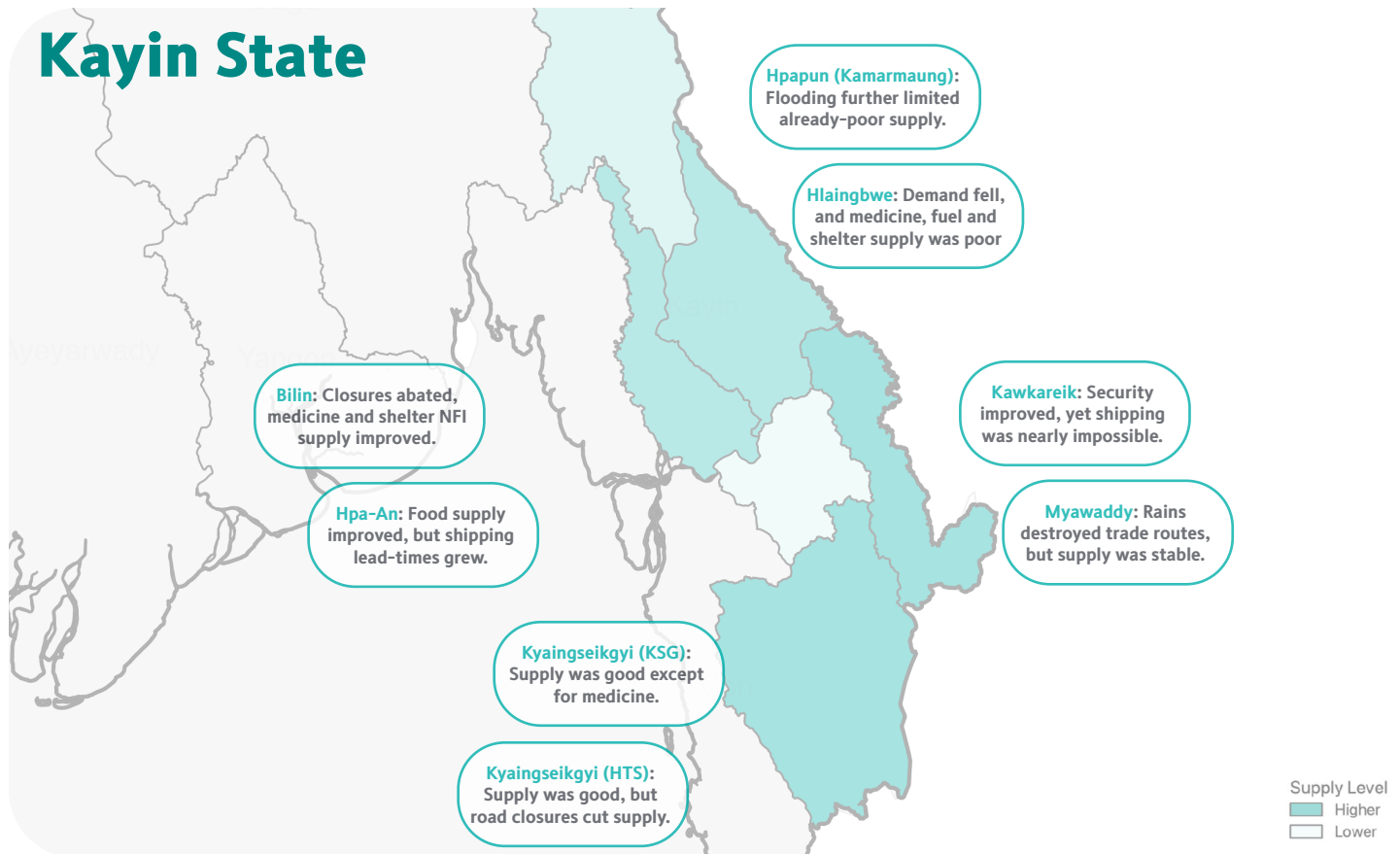


Chart 9.5. Supply, by Month (Shan)



Kayin State



Market Functionality

Markets were stable in Kayin State, and market operations were generally better than in other regions monitored with the exception of **Kawkareik**. Beyond Kawkareik, where conditions remained very unsafe, market environs were generally described as secure and there were few reports of closures. Food supply improved in July, although **NFI** supply was mostly static and supply of **medicines** worsened; yet overall supply remained better than in other regions monitored. Retailers in Kawkareik, Hpa-An and Hlaingbwe continued to report more challenges than those elsewhere in the state, but in general retailers reported fewer challenges in July compared to June. Shipping costs were stable or rising in July, and retailers lamented that **shipping** was complicated by monsoon rains and road closures.

Chart 10.1. Operating Hours, by Market

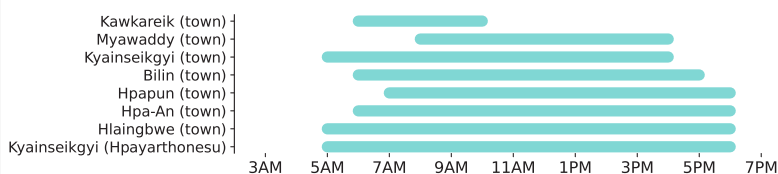


Chart 10.2. Portion of Markets with Closures (Kayin)

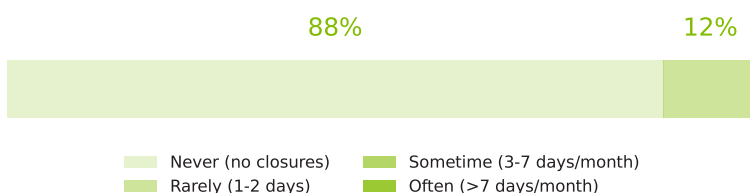


Chart 10.3 Supply, by Region

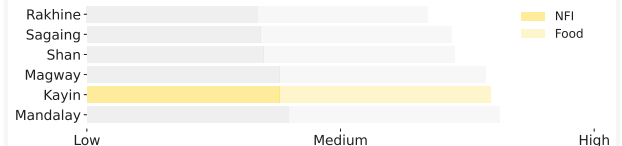


Chart 10.4. Supply, by Category (Kayin)

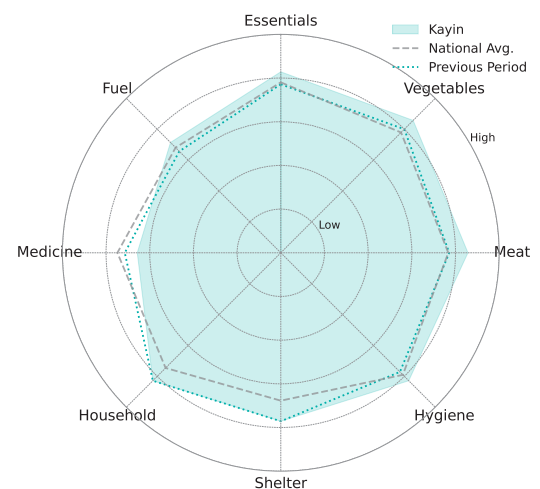
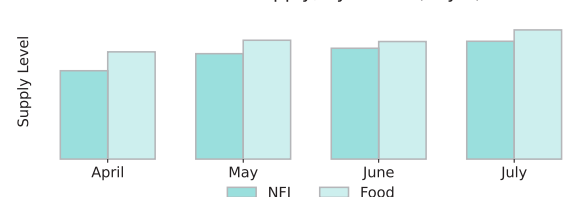


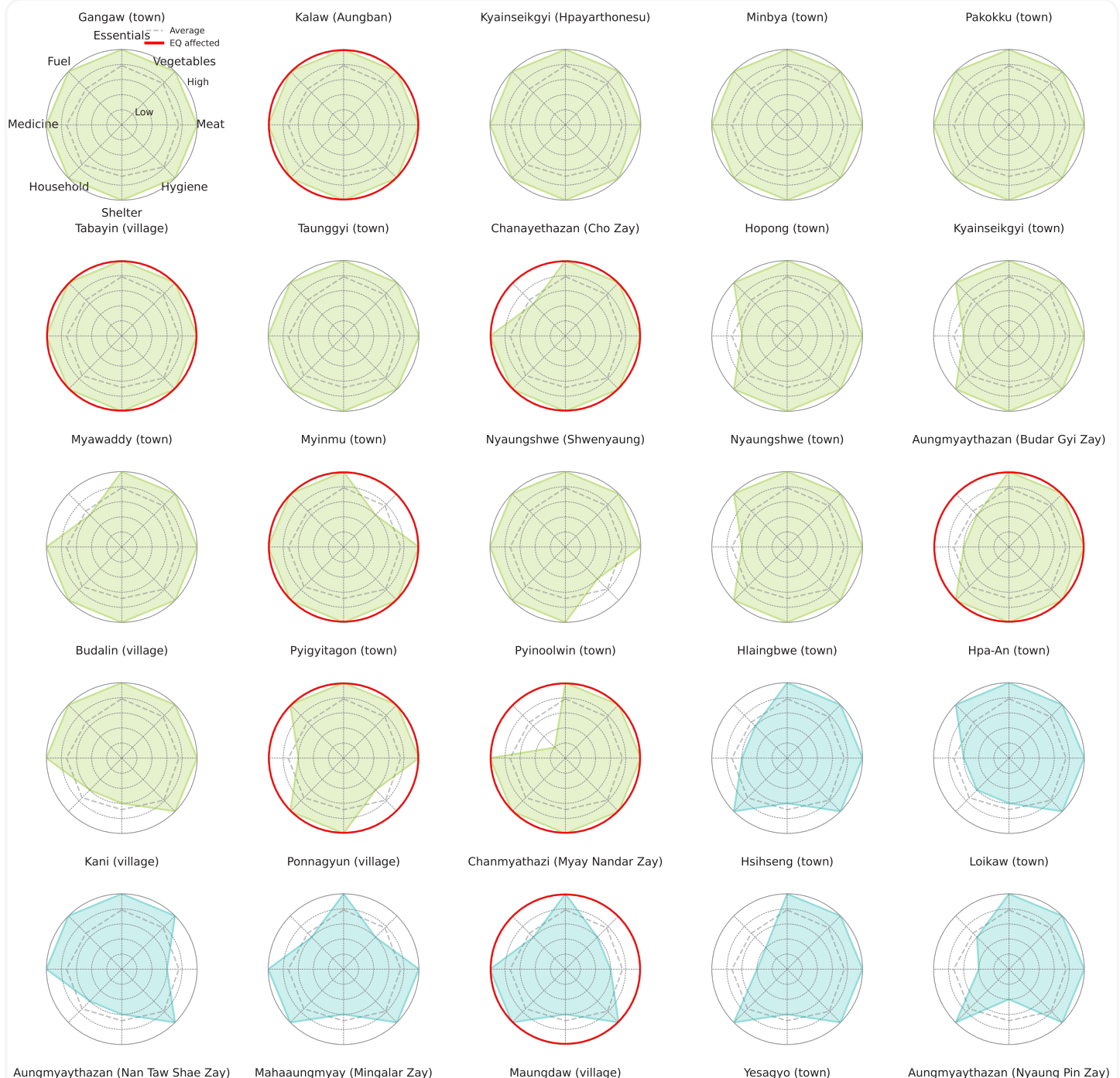
Chart 10.5. Supply, by Month (Kayin)



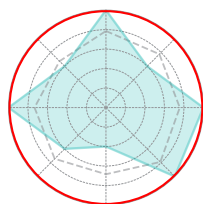
Township Supply

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 food and NFI supply. Supply of shelter NFIs was generally better here than in other markets monitored;
- Group B** - Markets with above-average supply and fewer deficiencies in medicine and hygiene NFIs; however fuel and shelter NFIs were often lacking;
- Group A** - Markets poor in food supply and very-poor NFI supply. Deficiencies were pronounced across a broad range of product categories;
- Group D** - Markets with severe shortages of both foods and NFIs. These markets also stood out for pronounced shortages of essential food items.

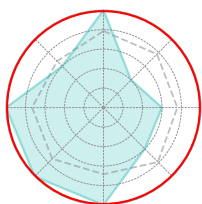


Aungmyaythazan (Nan Taw Shae Zay)



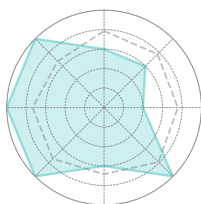
Bilin (town)

Mahaaungmyay (Mingalar Zay)



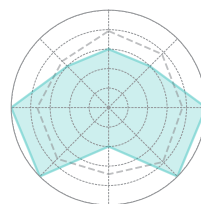
Chanayethazan (Yadanapon Zay)

Maungdaw (village)



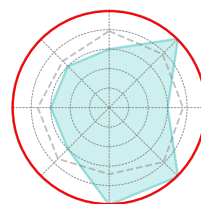
Kyaukse (town)

Yesagyo (town)

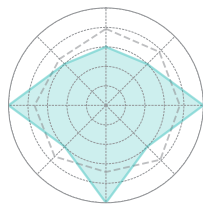


Myaung (village)

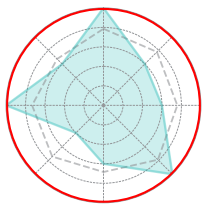
Aungmyaythazan (Nyaung Pin Zay)



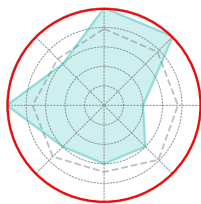
Patheingyi (town)



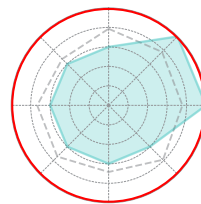
Pauktaw (village)



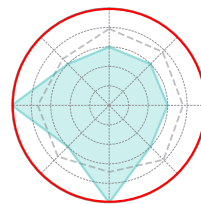
Sittwe (town)



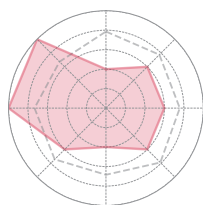
Chauk (town)



Hpapun (town)



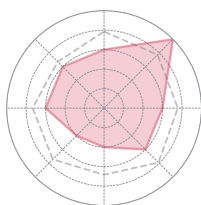
Kalaw (town)



Pinlaung (town)



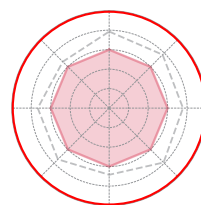
Taungoo (town)



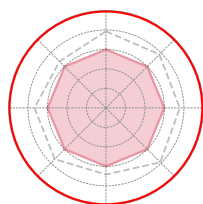
Ye-U (village)



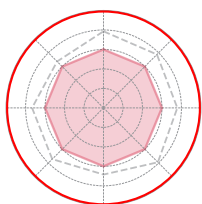
Myebon (town)



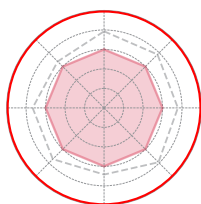
Rathedaung (village)



Shwebo (town)



Demoso (village)



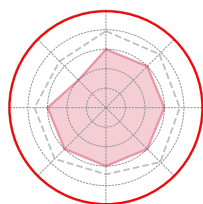
Lawksawk (town)



Pindaya (town)



Sagaing (town)



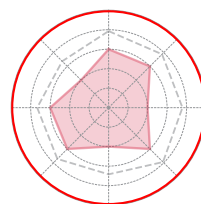
Saw (town)



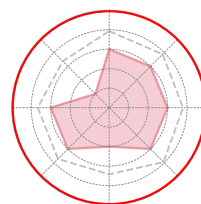
Monywa (town)



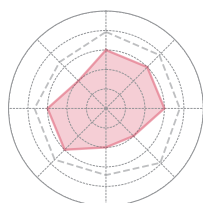
Yinmarbin (village)



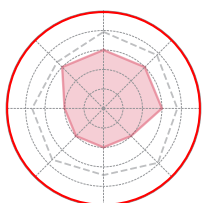
Ywangan (village)



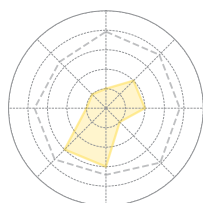
Pekon (village)



Kawkaireik (town)



Mrauk-U (town)



Kawkaireik (town)



Mrauk-U (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

Market Analysis Unit
market.analysis.unit@gmail.com