

Rapid Market Assessment

This Rapid Market Assessment (RMA) provides data on market function, supply, activity, and logistics in 56 non/earthquake townships across 9 states/regions. Data were collected primarily June 20–26 through observation and KIIs with 108 retailers. Reports available at www.themimu.info/market-analysis-unit.



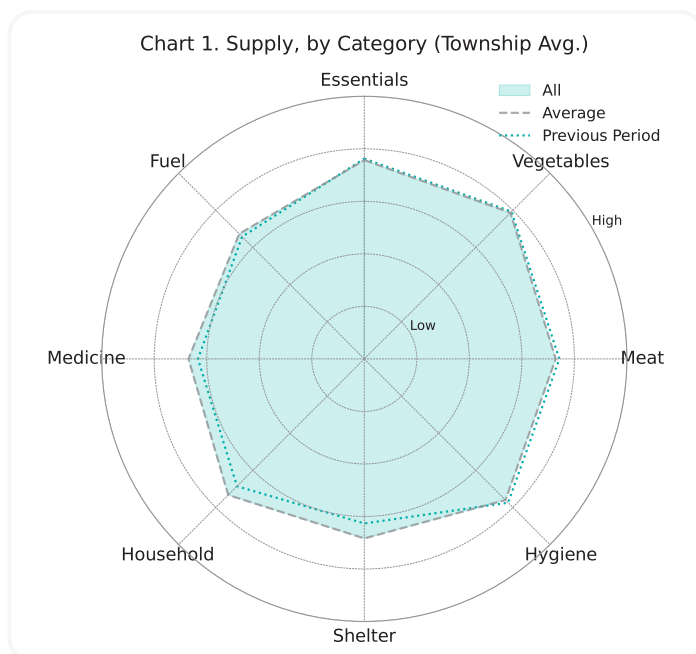
KEY FINDINGS

- **Most markets were open and operational**, and trade with neighboring markets remained possibly albeit costly;
- **Closures occurred in Shan, Kayin and Rakhine States**, and security was a concern in multiple Rakhine markets;
- **Supply was fairly stable and NFI supply improved**, particularly in Rakhine and Kayin States;
- **Supply worsened from an already-low level in Sagaing** as medicines and shelter NFIs grew ever more scarce;
- **Medicines and fuel remained most difficult to acquire**, particularly in Sagaing Region and Shan State;
- **Rakhine and Kayin retailers reported many challenges**, and Mandalay retailers worried about weak demand;
- **Shipping costs rose even amid stable petrol prices** as retailers cited the safety and feasibility of shipping;
- **Market conditions grew dire in Kawkaireik and Pekon** where conflict constrained retail activity even further.

Overview

Markets were open and operational in June, but transportation challenges due to conflict stifled trade and resupply. Closures were relatively rare outside of Rakhine State, and trade remained possible. Yet shipping grew ever more difficult and retailers increasingly feared poor security and rising costs during shipment. Food and NFI supply held up in many markets, but retailers suggested this may be due in part to weak demand as households struggle to afford many goods. Retail challenges were stiffest in Kayin and Rakhine States.

Food supply was fairly stable in June, and NFI supply improved slightly. NFI supply rose in Kayin State, although it fell in Sagaing Region. Food supply dipped notably only Southern Shan State. Fuel and medicine supply remained by far scarcest, and Sagaing and Mandalay continued to represent the low- and high-ends of the overall supply spectrum. Poor transportation and shipping due to restrictions, informal taxes and limited security were by far retailers' greatest challenge.



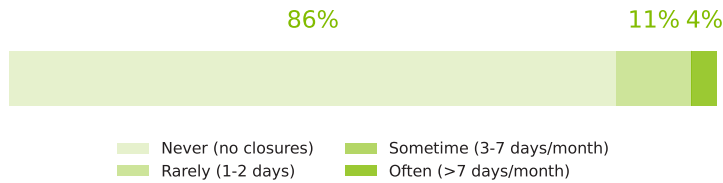
What to Watch

- Stable retail outlets may distract from broken market systems as conflict limits regional **shipping**;
- Supply may remain higher than expected, if only because poor **cash access** curtails **demand**;
- Supply of **vegetables** is likely to fall as seasonal production shifts toward rice cultivation;
- Retailers in **Kawkaireik** and **Pekon** may cease operations if conditions continue to deteriorate.

Market Functionality

Markets were widely functional in June. Market closures were rare and damage to inventory or infrastructure remained rare as well, yet one-in-five markets remained unsafe (**Chart 2**). Market linkages with neighboring villages and townships was good.

Chart 2. Portion of Markets with Closures (All)



18% Markets described as "unsafe" or "very unsafe."
4% Markets reporting recent damage.

96% Markets serving nearby villages.
79% Markets serving serving nearby townships.

Supply of Goods

The bottom-third of markets monitored had significantly-poorer supply in June than the top two-thirds (**Chart 4**). Markets with consistently-poor security—such as Pekon, Demoso, and Kyauktaw—remained among the weakest in terms of supply. The breadth of supply at markets also remained better than the depth of supply (**Chart 4**). Supply continued to be driven by a combination of factors including conflict, earthquake affects and adverse weather events.

Chart 3. Supply of Foods and NFIs

Red denotes Earthquake-prioritized townships (OCHA)

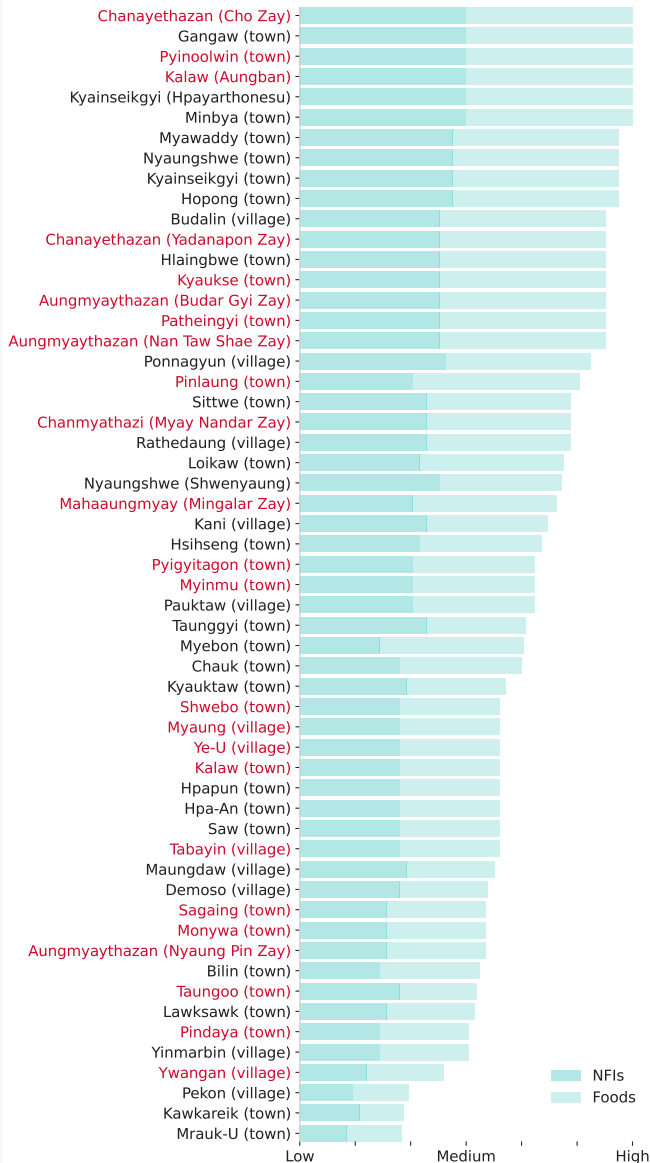
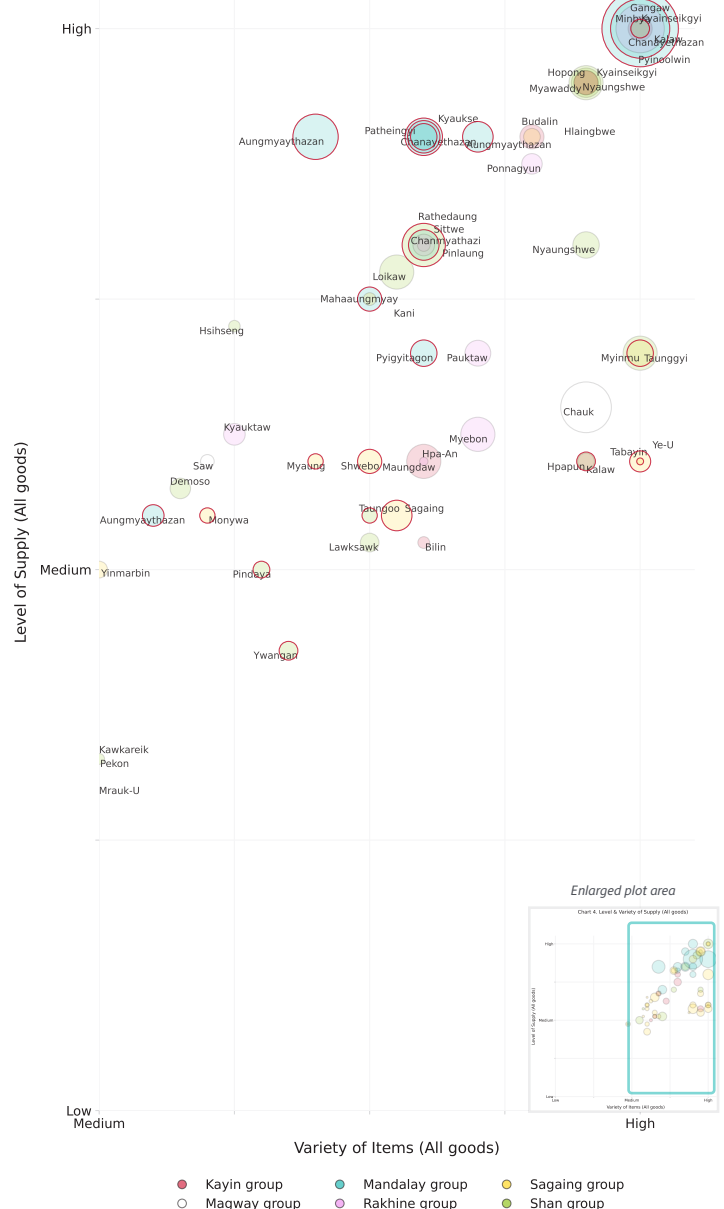
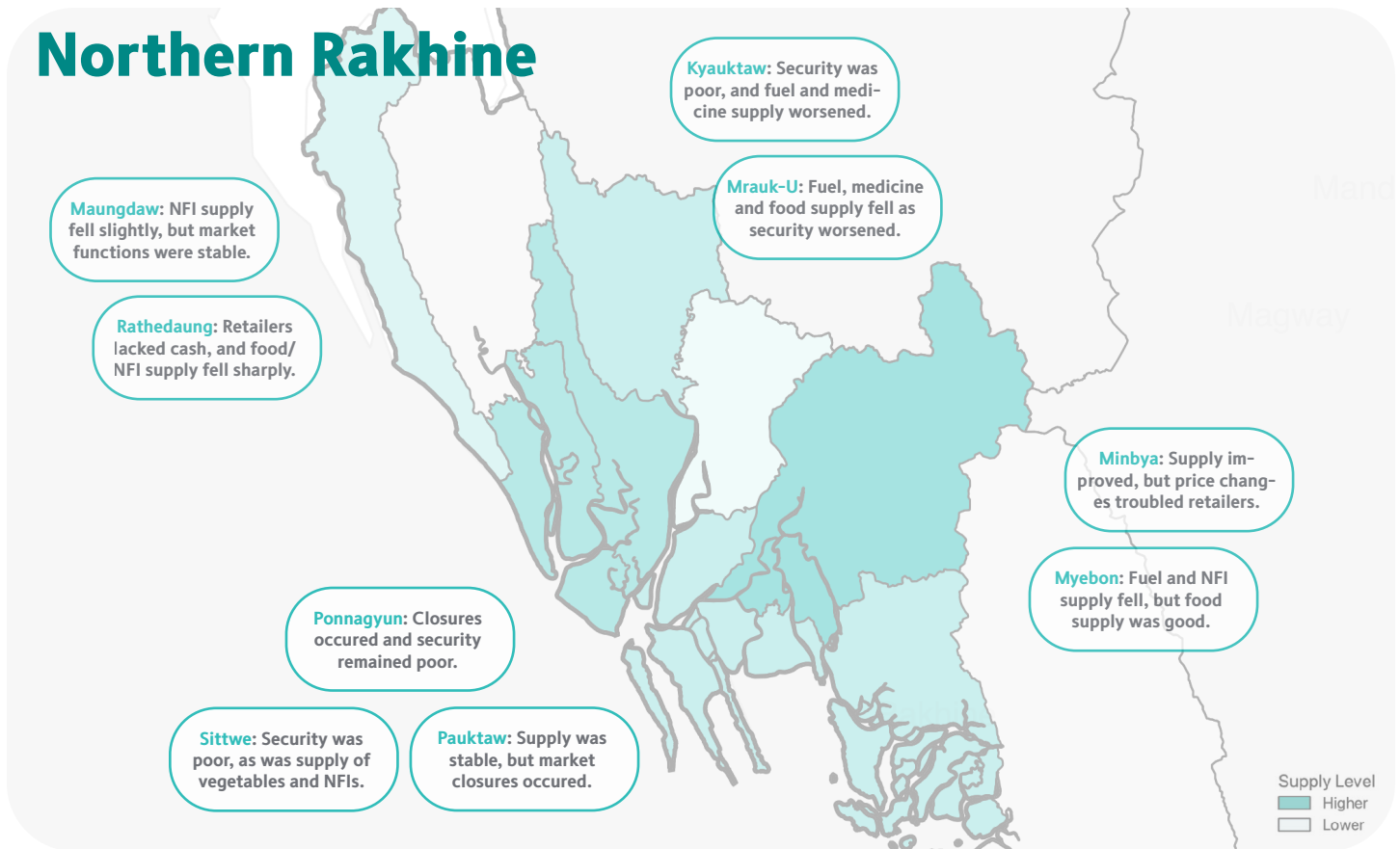


Chart 4. Level & Variety of Supply (All goods)

Bubble size indicates market size



Northern Rakhine



Market Functionality

Markets in Rakhine State were operational, although market conditions worsened slightly in June. Nearly all markets operated throughout the day, yet market closures increased. **Closures** were more common in Rakhine than in other regions monitored, and **security** was a concern for retailers in half of all markets monitored. Retail challenges were more prominent here than in other regions, and **Mrauk-U**, **Kyauktaw**, and **Minbya** reported many challenges. Poor **cash access** was widely-cited by retailers, several of whom said they lacked capital to buy new inventory. Ordering new supply was also challenging, and one retailer said orders of **medicines** were often late or did not arrive at all. Retailers in some markets reported rising shipping costs, while some in other markets reported stable shipping costs.

Chart 5.1. Operating Hours, by Market

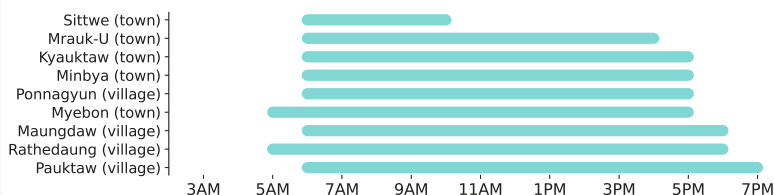
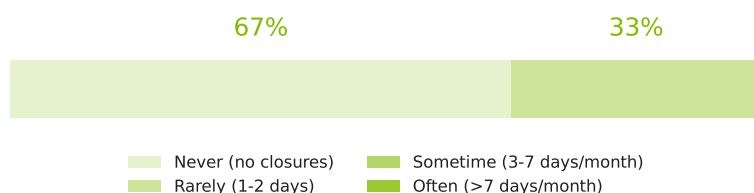


Chart 5.2. Portion of Markets with Closures (Rakhine)



Supply of Goods

Food and NFI supply improved a bit in June as retailers restocked **shelter** NFIs for the monsoon season. There were also unexpected gains in **vegetable** supply, but **fuel** supply worsened somewhat.

Chart 5.3 Food & NFI Supply, by Region

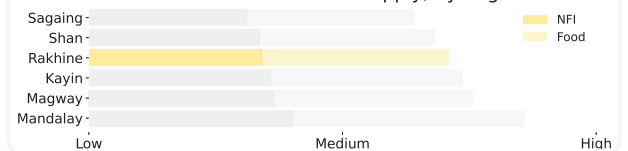
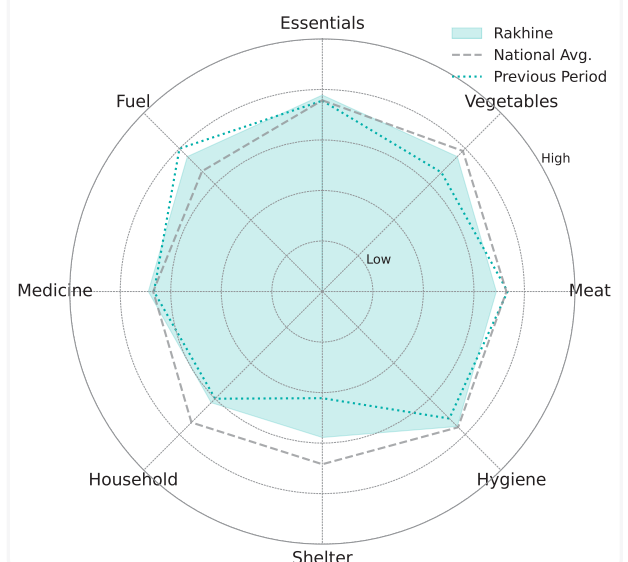
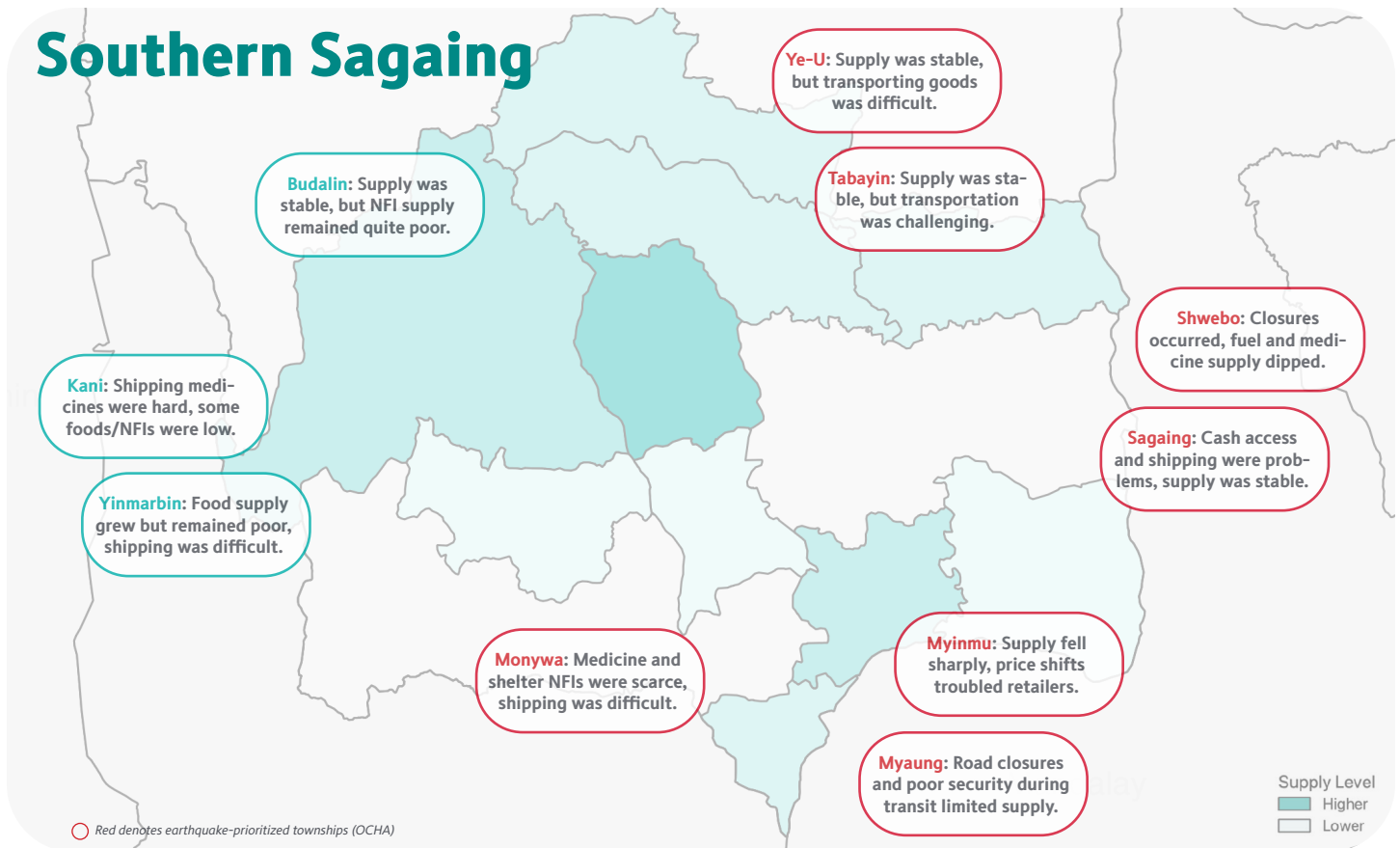


Chart 5.4. Supply, by Category (Rakhine)



Southern Sagaing



Market Functionality

Markets in Southern Sagaing were open and free of closures, yet moving goods between markets was very challenging. Trade with neighboring villages and townships continued, but **transportation** was an oft-cited challenge for retailers. Poor **security** limited shipments and retailers struggled to bring goods into the region, even though shipping costs were widely reported as stable. Security was particularly poor in/near **Myaung** market, where road closures limited resupply. Markets in Myaung, Kani and Budalin kept shorter hours and seldom served neighboring townships, and those in **Monywa** and **Sagaing** reported retail challenges as well. Some retailers said they struggled with rapid fluctuations in prices demanded by their suppliers.

Supply of Goods

Supply of **NFIs** weakened in June, while food supply was stable. Supply of **medicines**, **shelter** NFIs and **household** NFIs declined slightly. Overall supply remained poorest of all the regions monitored.

Chart 6.1. Operating Hours, by Market

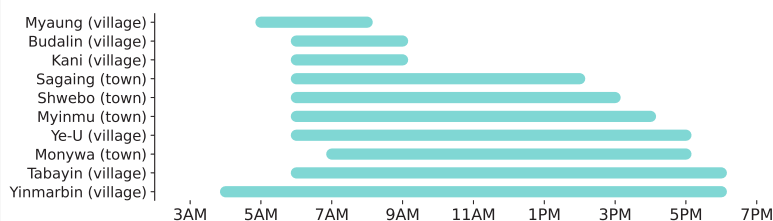


Chart 6.2. Portion of Markets with Closures (Sagaing)

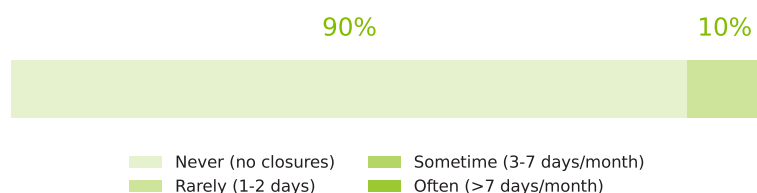


Chart 6.3 Food & NFI Supply, by Region

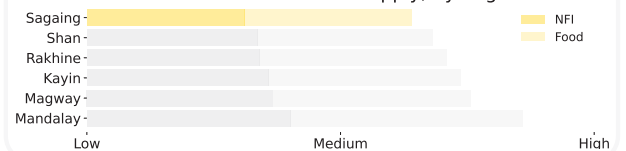
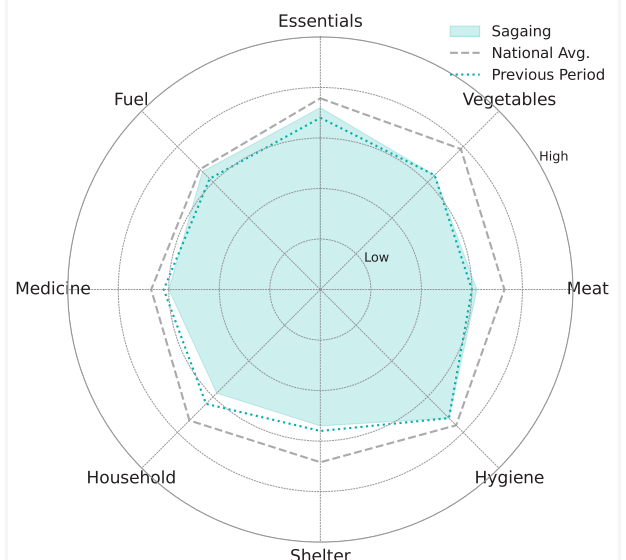
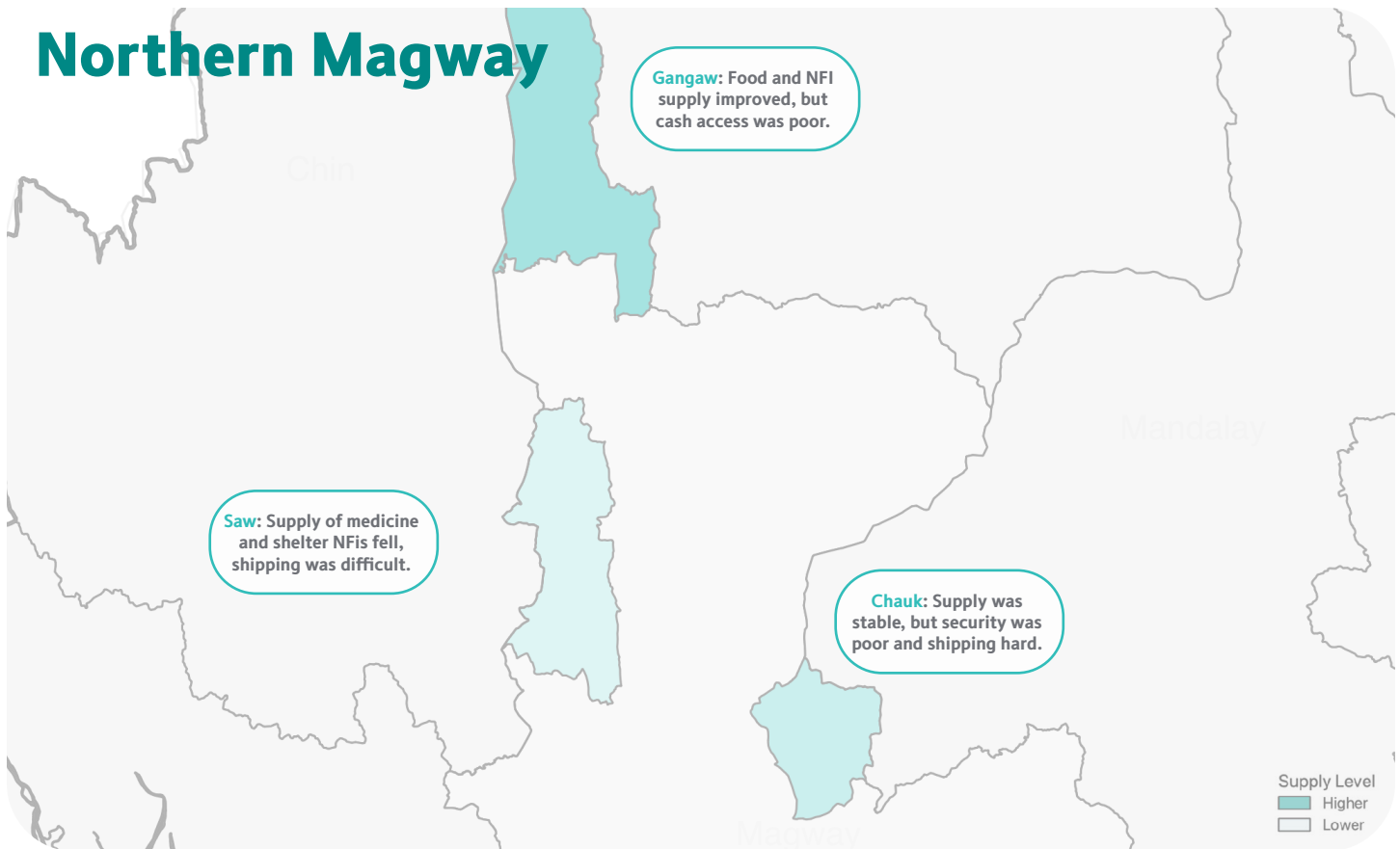


Chart 6.4. Supply, by Category (Sagaing)



Northern Magway



Market Functionality

Conflict-related events curtailed monitoring activity in Northern Magway Region in June, limiting data from Pauk, Pakokku and Myaing. Among the remaining markets, retail outlets were open and no closures were reported during June. That said, security was reportedly poor in/near **Chauk** market even as commercial activity continued. Retailers said **shipping** costs rose in June as fuel supply worsened somewhat. Overall, **transportation** was by far the most-widely cited challenge among retailers interviewed in Magway June, followed by **supply** of goods and poor **cash access** for buying and holding inventory. Overall supply appeared relatively good, but this may be biased as more-troubled markets like Myaing dropped out of the sample.

Supply of Goods

NFI supply improved in June, and vegetable supply remained above-average. All NFI categories improved, except for **fuel** supply which declined. Supply of food and hygiene NFIs was stable.

Chart 7.3 Food & NFI Supply, by Region

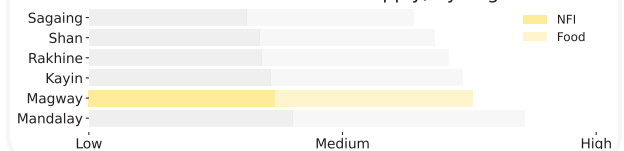


Chart 7.4. Supply, by Category (Magway)

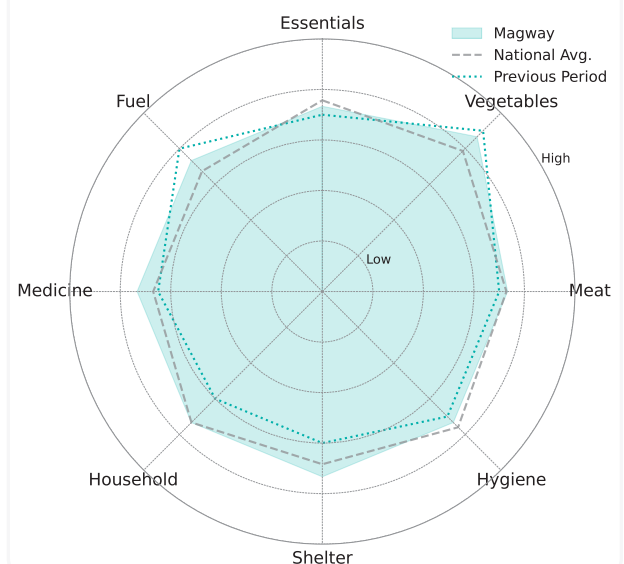


Chart 7.1. Operating Hours, by Market

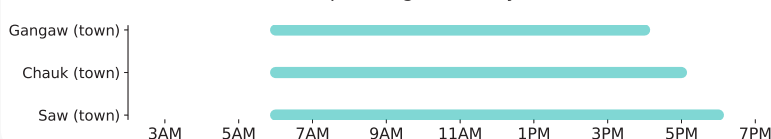
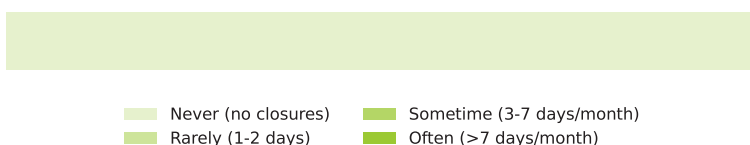
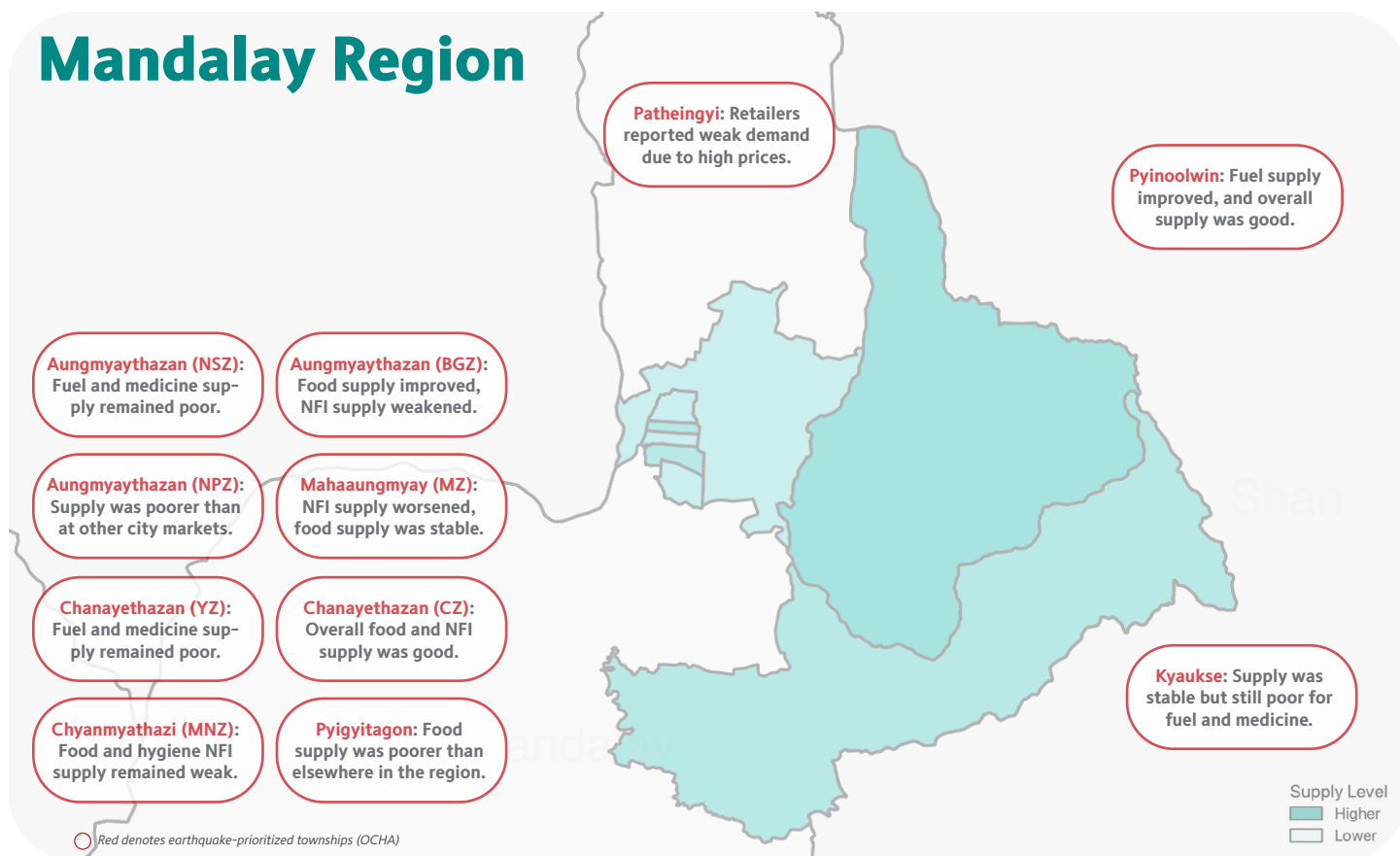


Chart 7.2. Portion of Markets with Closures (Magway)

100%



Mandalay Region



Market Functionality

Markets in Mandalay were open and free of closures in June. Market hours were regular and there were no reports of new damage, although existing damage from the March 2025 earthquake remained troubling for retailers. Retailers said **shipping** costs rose in June, and transportation and supply were common challenges. Retailers also reported weakening **demand**—particularly for **hygiene** and **household** NFIs—which they attributed to rising NFI prices. Safety was less of a concern for Mandalay retailers than for those elsewhere, but infrastructure **damage** remained a notable concern months after the earthquake destroyed homes and buildings in the region.

Supply of Goods

Supply of fuel and household NFIs improved in June, although other product groups were unchanged. Supply in Mandalay remained above-average for all categories except **fuel** and **medicine**.

Chart 8.1. Operating Hours, by Market

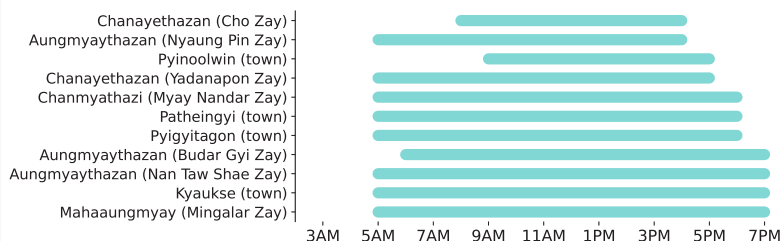
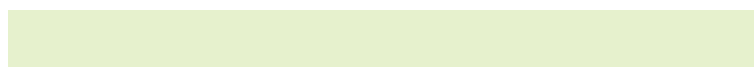


Chart 8.2. Portion of Markets with Closures (Mandalay)

100%



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

Chart 8.3 Food & NFI Supply, by Region

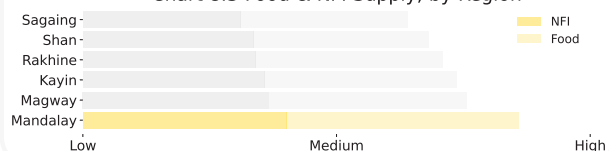
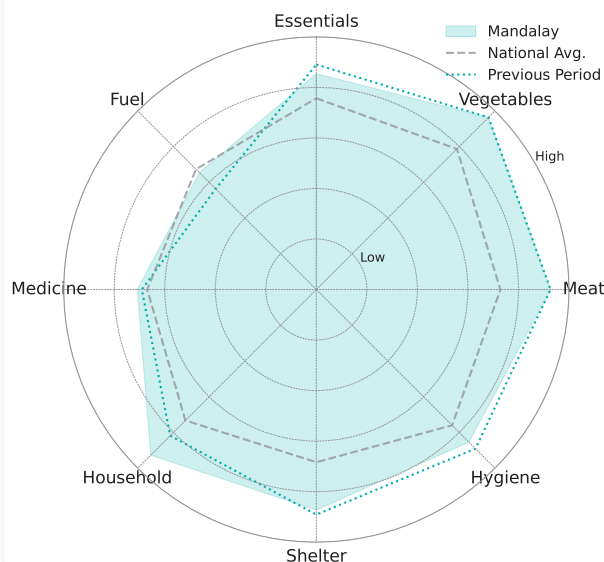
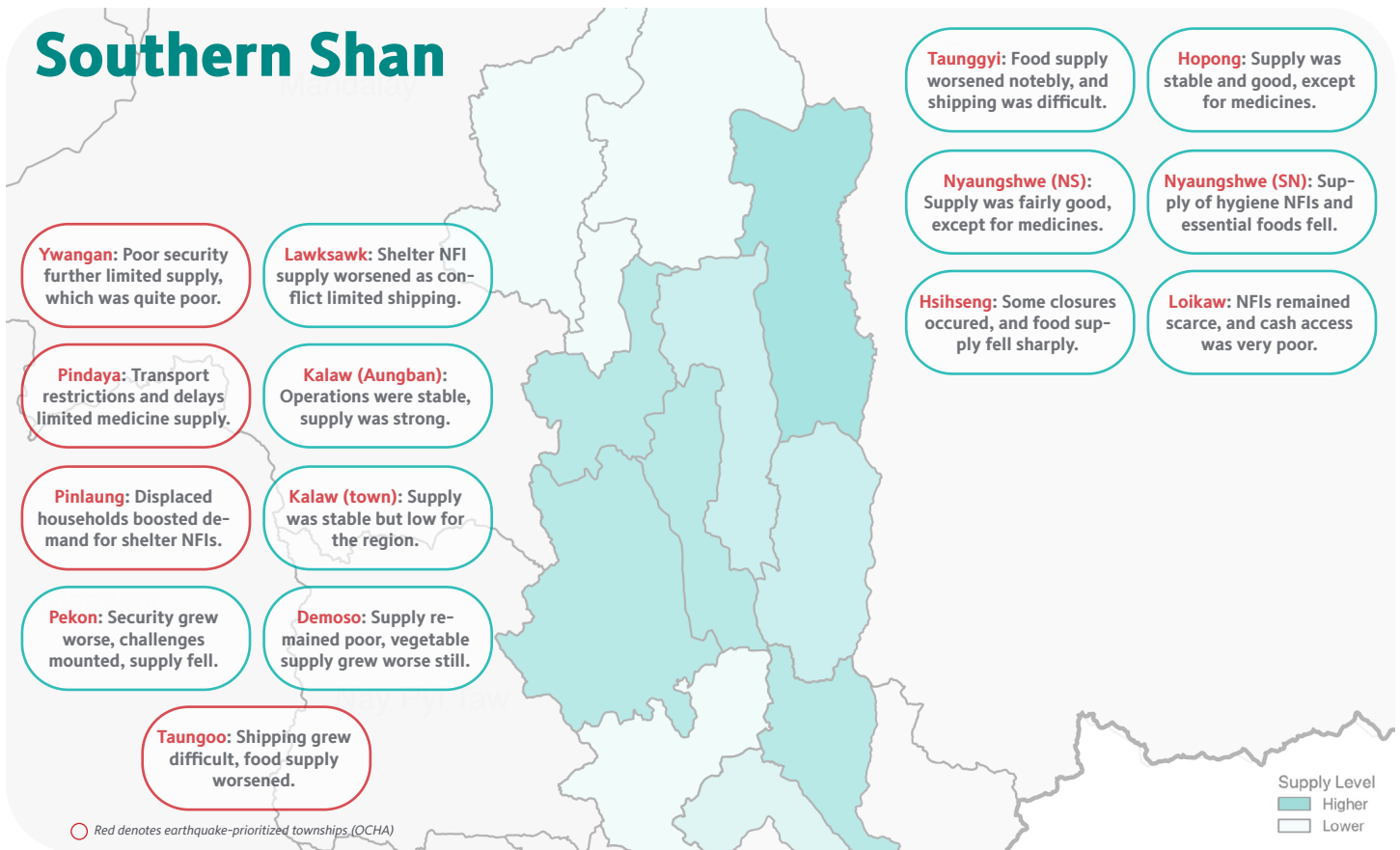


Chart 8.4. Supply, by Category (Mandalay)



Southern Shan



Market Functionality

Markets in Southern Shan State were generally functional, although those in/near Kayah State remained unstable. **Security** was poor in Demoso, Pekon and Ywangan, and **closures** troubled markets in Hsihseng and Pekon. Pekon and Loikaw retailers reported limited trade with neighboring markets. Retailers in these markets also reported many challenges, such as restricted or delayed **transportation** of goods. Retailers emphasized that **shipping** costs rose in June.

Supply of Goods

Food supply worsened across categories in June and particularly for **essential foods**. NFI supply was somewhat stable, but shelter NFI supply improved slightly and **fuel** and **fuel** NFI supply fell.

Chart 9.1. Operating Hours, by Market

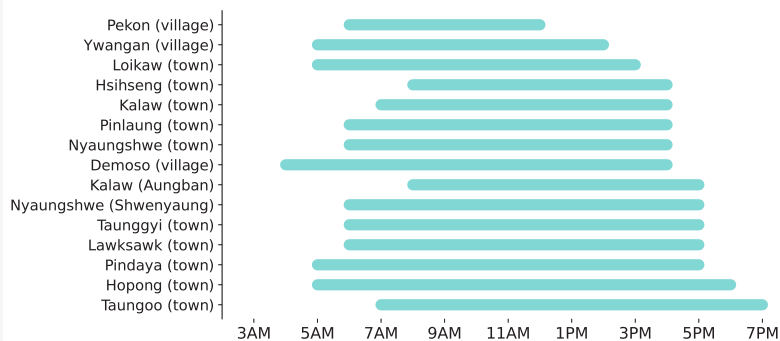


Chart 9.2. Portion of Markets with Closures (Shan)

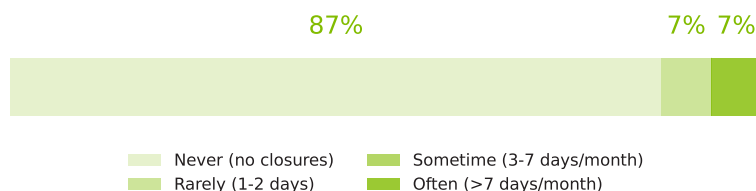


Chart 9.3 Food & NFI Supply, by Region

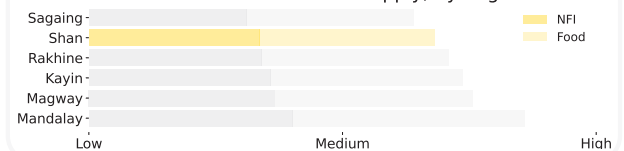
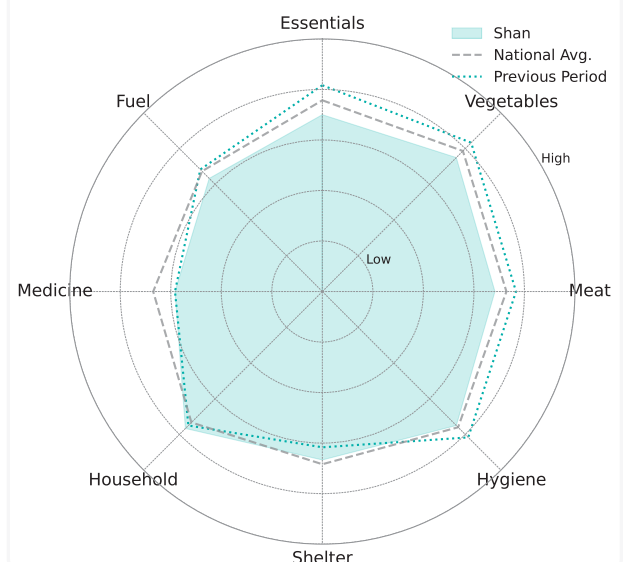
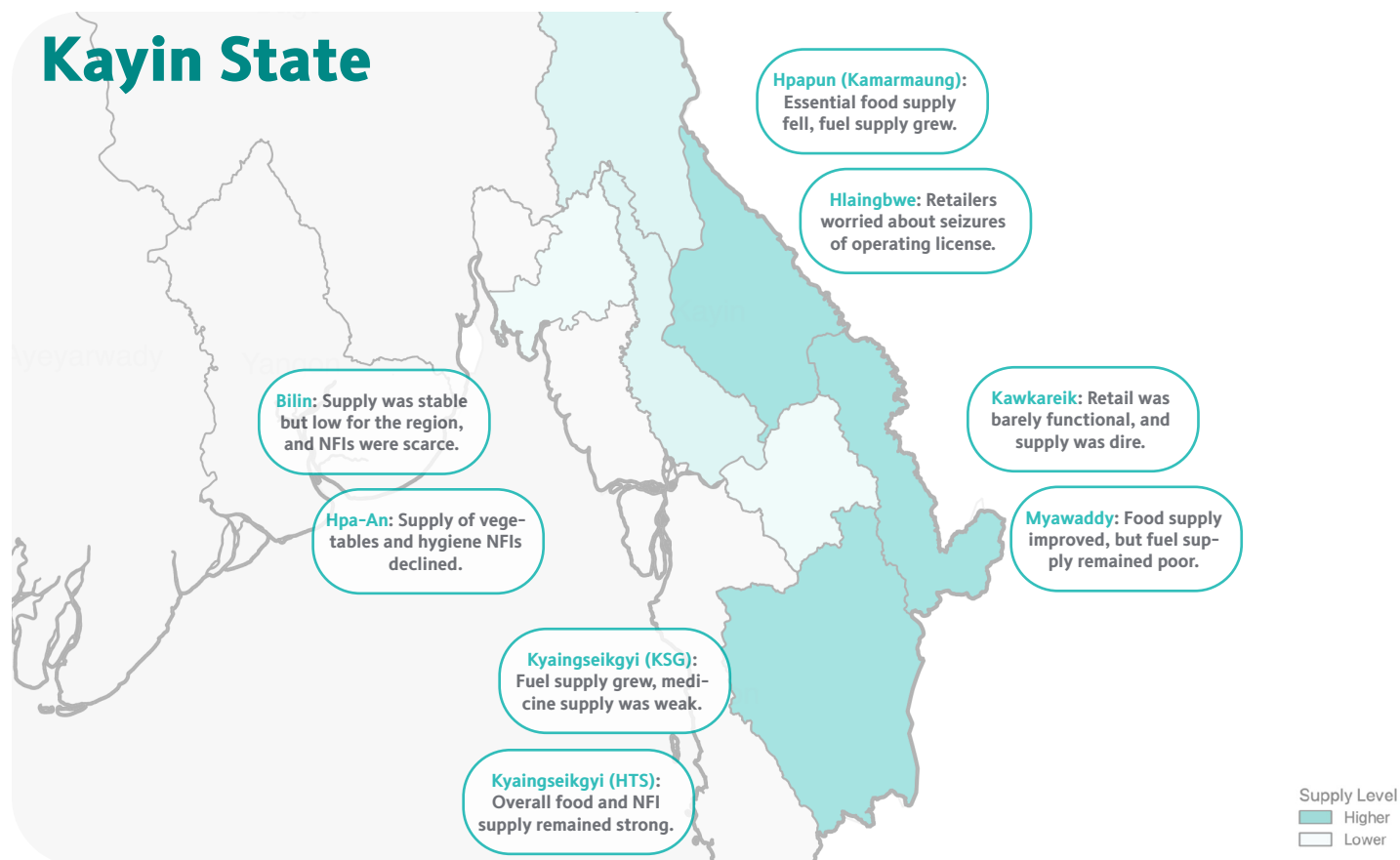


Chart 9.4. Supply, by Category (Shan)



Kayin State



Market Functionality

Markets were open and operational in June, but retail was hampered in Kawkaireik and Bilin. Market **closures** limited retail activity in **Kawkaireik** and **Bilin**, both of which reported disruptions in trade with surrounding townships and villages. In addition to Kawkaireik, Hlaingbwe and Hpa-An retailers reported many challenges. **Transportation** difficulties were the most commonly-cited challenge, and many retailers said **shipping** costs were rising. Retailers said they were unable to order new supply from their suppliers, and rising prices were stifling **demand**. Conditions in/near Kawkaireik market—already very poor in May—grew dire in June, and retailers considered halting operations and leaving the town. Retailers in Kayin State reported far more challenges in general than those in other regions monitored.

Supply of Goods

NFI supply improved in June driven by medicine and shelter NFIs, but **hygiene NFI** supply worsened. Food supply was stable and roughly average compared to other regions monitored.

Chart 10.1. Operating Hours, by Market

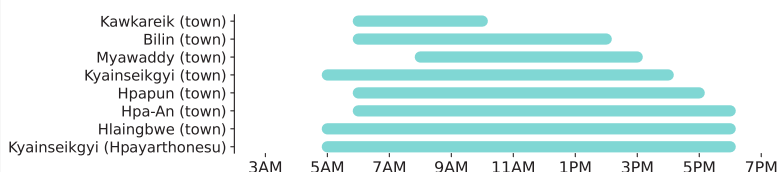


Chart 10.2. Portion of Markets with Closures (Kayin)

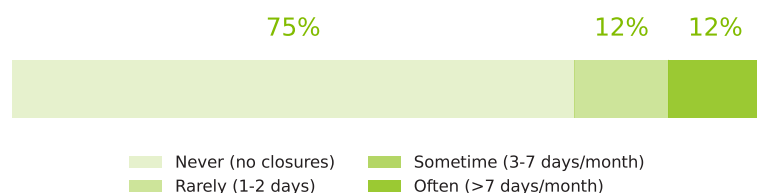


Chart 10.3 Food & NFI Supply, by Region

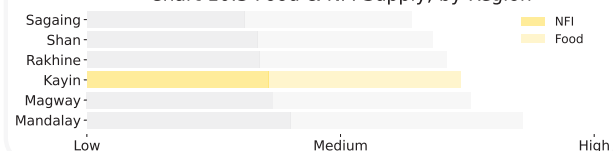
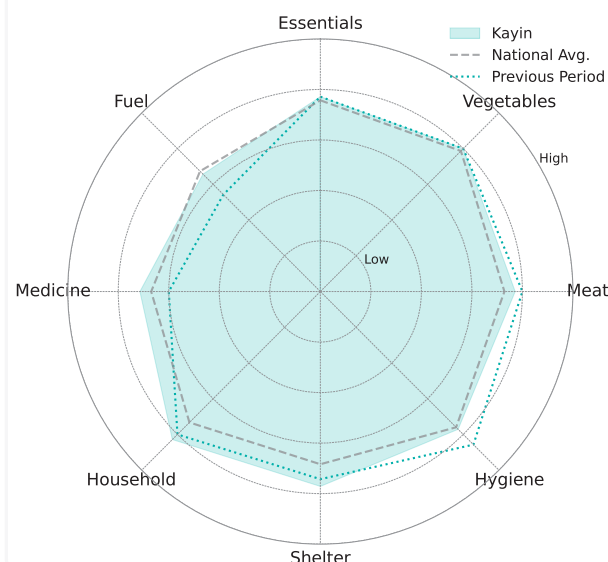


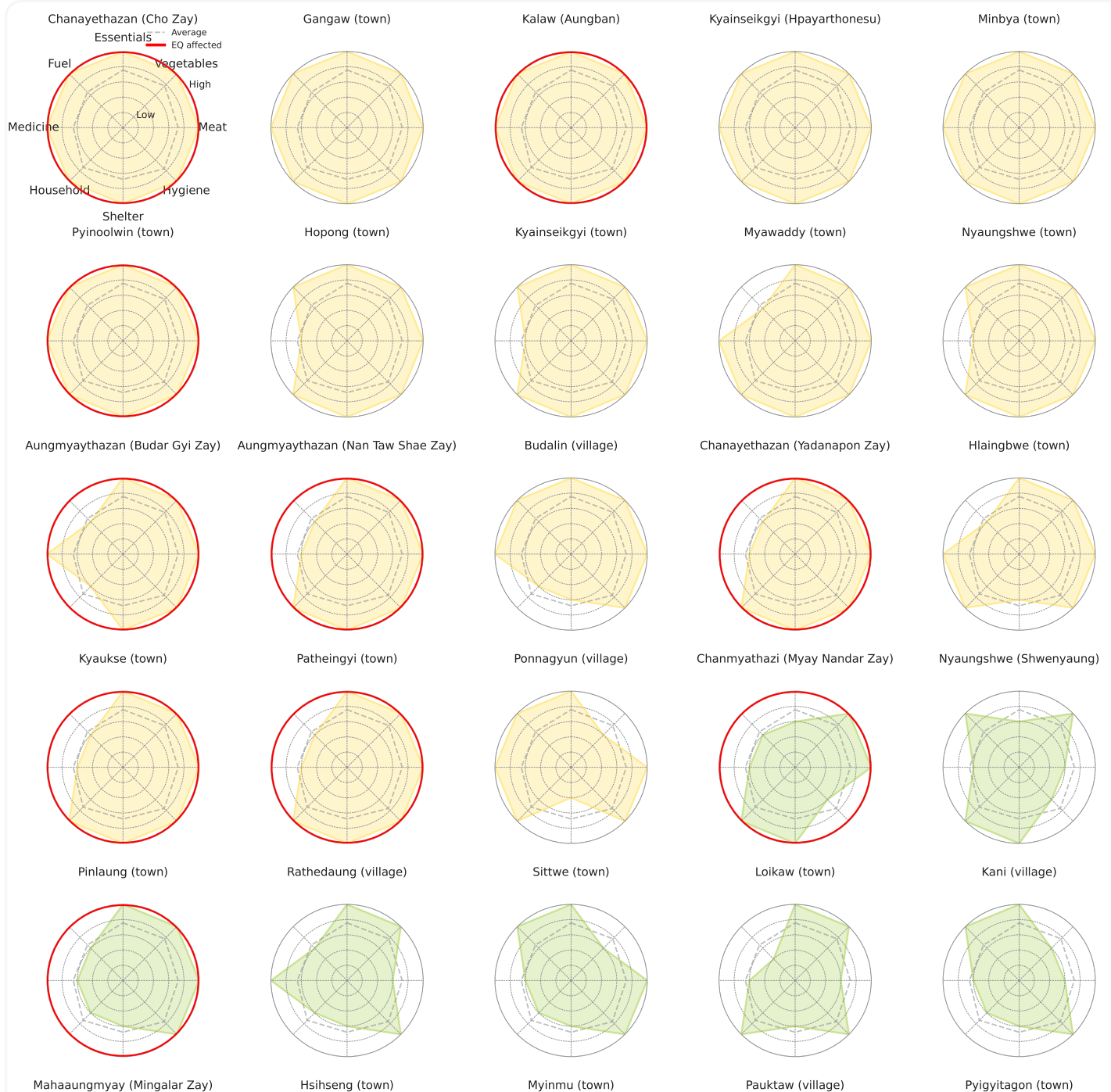
Chart 10.4. Supply, by Category (Kayin)



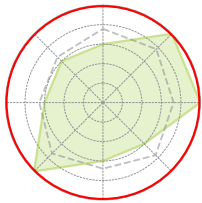
Township Supply

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:

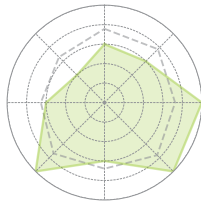
- Group D** - Markets with strong food and NFI supply. Gaps in supply were generally limited to NFIs, and typically they involved just one category of goods;
- Group C** - Markets with above-average supply but weak supply for multiple foods or NFIs. The most common supply deficit in these markets was medicine;
- Group A** - Markets with weak supply for both food and NFIs. Many items were poorly-supplied, but medicine and fuel supply were often poorest;
- Group B** - Markets with severe shortages of both food and NFI supply. Fuel and essential foods were among the most poorly-supplied categories of goods.



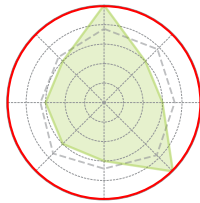
Mahaaungmyay (Mingalar Zay)



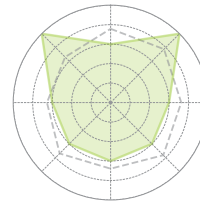
Hsihseng (town)



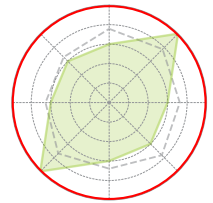
Myinmu (town)



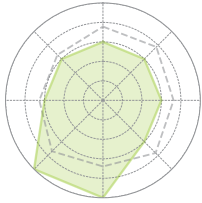
Pauktaw (village)



Pyigyitagon (town)



Taunggyi (town)



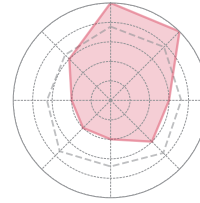
Chauk (town)



Kyauktaw (town)



Myebon (town)



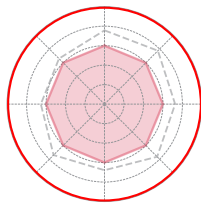
Hpa-An (town)



Hpapun (town)



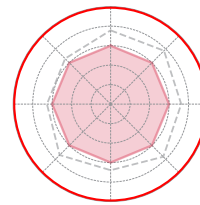
Kalaw (town)



Maungdaw (village)



Myaung (village)



Saw (town)



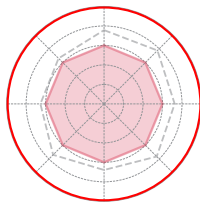
Shwebo (town)



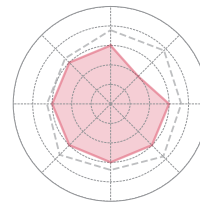
Tabayin (village)



Ye-U (village)



Demoso (village)



Aungmyaythazan (Nyaung Pin Zay)



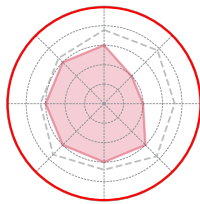
Monywa (town)



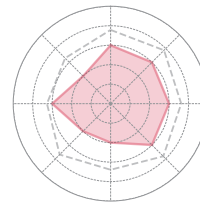
Sagaing (town)



Taungoo (town)



Bilin (town)



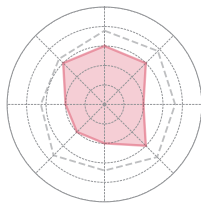
Lawksawk (town)



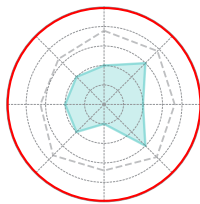
Pindaya (town)



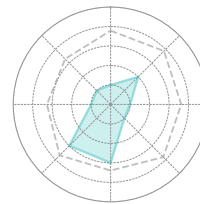
Yinmarbin (village)



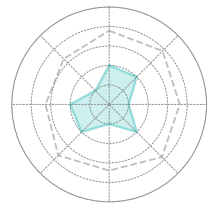
Ywangan (village)



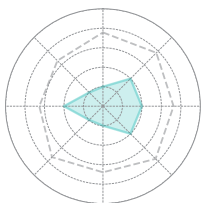
Kawkareik (town)



Pekon (village)



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