

November 2025

Rapid Market Assessment

This Rapid Market Assessment (RMA) provides data on market function, supply, activity, and logistics in 60 earthquake/non-earthquake townships across 9 states/regions. Data were collected Nov. 20–30 through observation and KIIs with 121 retailers. Reports available at www.themimu.info/market-analysis-unit.



KEY FINDINGS

- **Markets were open and functional in November** with few closures and some improvement in market security;
- **Linkages between townships and villages were intact**, but one-in-five townships still had tenuous trade links;
- **Overall supply was stable in November**, but fuel supply worsened and NFI supply improved marginally;
- **Fuel supply grew much worse in Kayin and Magway** amid reports of restrictions on fuel shipments;
- **Winter vegetables improved food supply in Rakhine**, bringing food more in line with other regions monitored;
- **Supply of shelter NFIs in Rakhine remained very poor** and accounted for the state's largest weakness in supply;
- **Checkpoints and restrictions strained transportation** raising supply costs and limiting inventory;
- **Security was a major concern in select markets** where retailers feared airstrikes and thus limited their activity.

Overview

Market operations remained relatively stable in November, despite many concerns from retailers about local safety and security. Checkpoints and trade restrictions greatly hampered trade, limiting access to fuel, foods and some NFIs. Fuel supply grew much worse in Kayin and Magway, and retailers in Kayin said Thai imports became much harder to acquire in November. Overall food supply was stable, and it improved in Rakhine State where winter harvest brought more vegetables to market. Shipping costs were stable, yet transportation of goods remained very difficult. Despite stable supply many retailers reported trade challenges and growing worries about security.

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

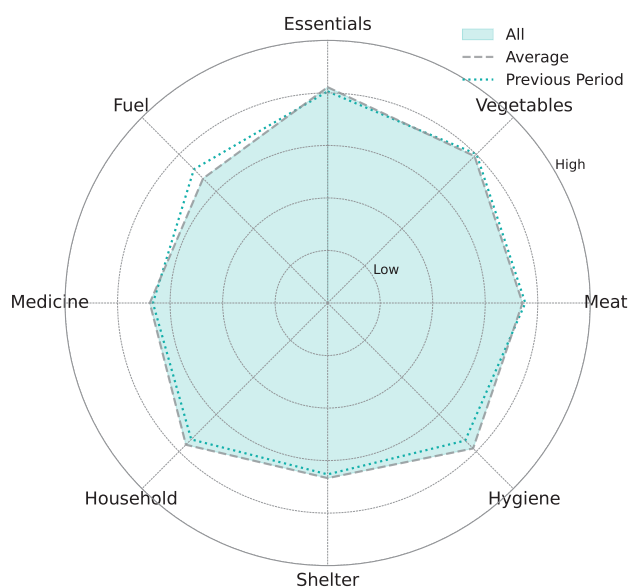
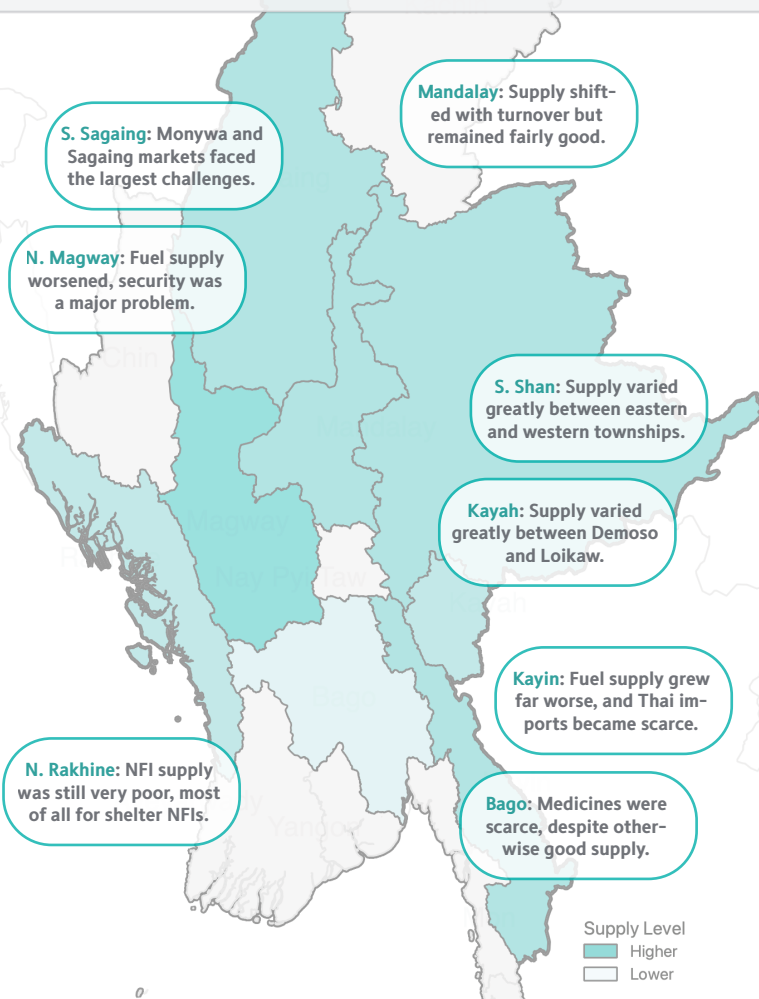
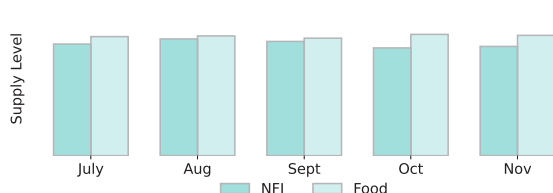
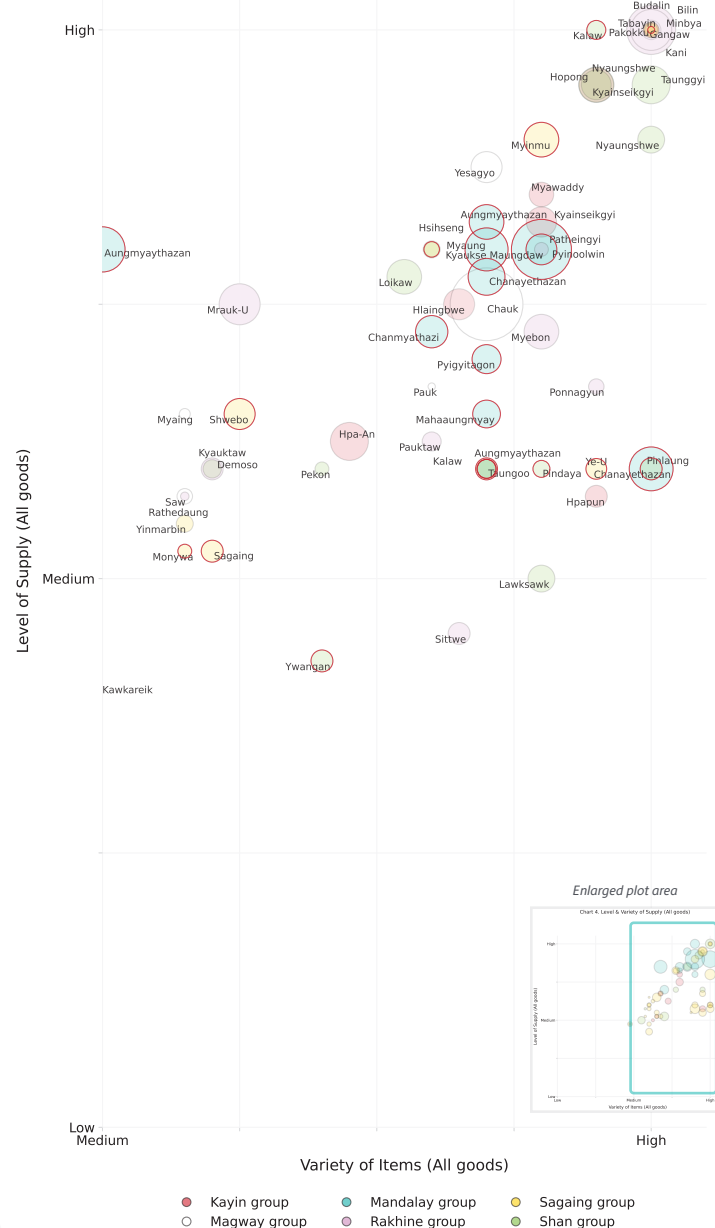


Chart 1.2 - Supply, by Month (Township Avg.)

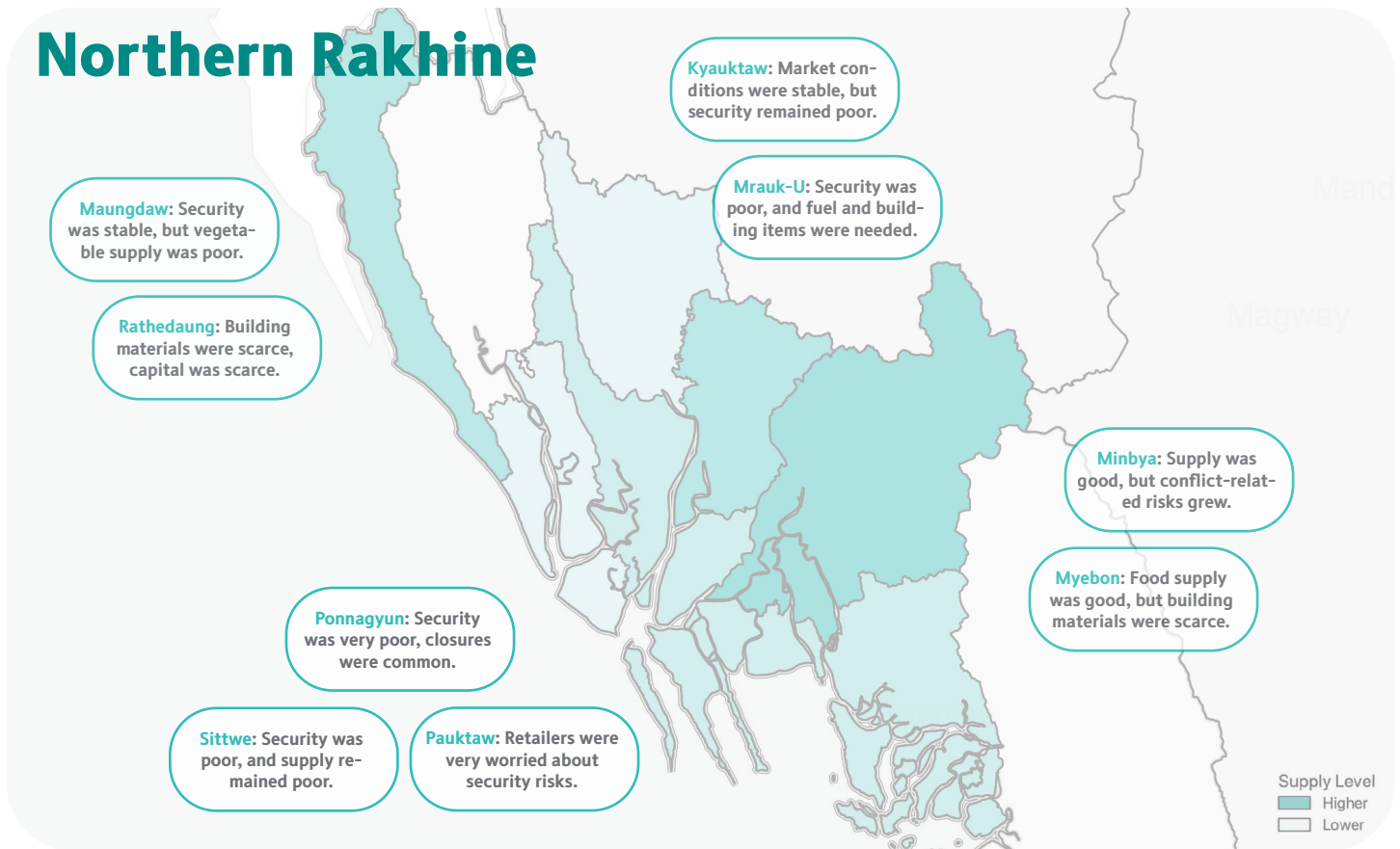


What to Watch

- Tensions around the upcoming elections may mute market activity as retailers fear security incidents;
- Limited **fuel** supply may continue to grow worse if tighter restrictions are not removed;
- Supply of **vegetables** should help improve overall food supply as winter crops come online;
- Supply of winter-related **NFIs** like charcoal and blankets may become strained as demand rises.



Northern Rakhine



Market Functionality

There were increased market **closures** in Rakhine in November, and **security** worsened around some markets where it was already poor such as **Ponnagyun**. Despite this, closures were temporary, markets otherwise kept regular hours, and supply links between townships continued. Food supply improved in November due to the arrival of winter vegetables. NFI supply was overall stable, but **fuel** and **shelter** NFI supply declined as supply of medicines and household NFIs improved slightly. Retailers in Rakhine continued to report more challenges than other regions monitored—particularly in **Mrauk-U** and **Pauktaw**—often linked to security and the risk of damage or injury from airstrikes. Lack of capital and animal disease also worried retailers in some markets.

Chart 5.1. Operating Hours, by Market

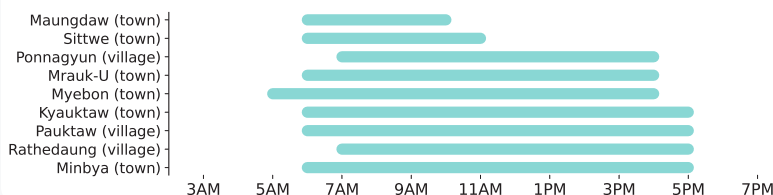


Chart 5.2. Portion of Markets with Closures (Rakhine)

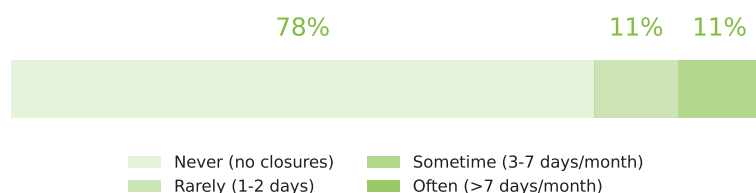


Chart 5.3 Supply, by Region

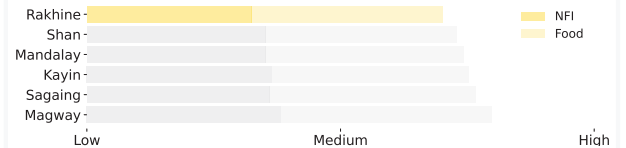


Chart 5.4. Supply, by Category (Rakhine)

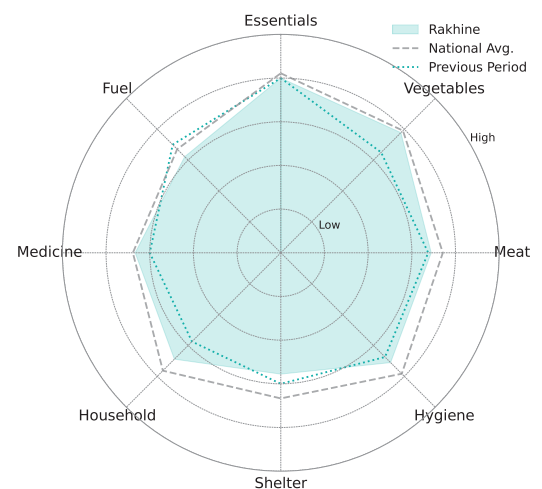
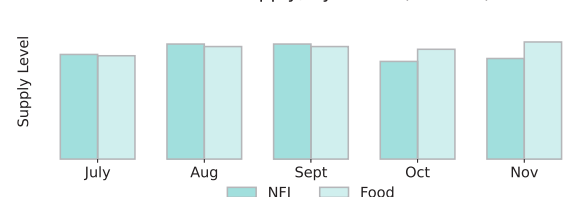
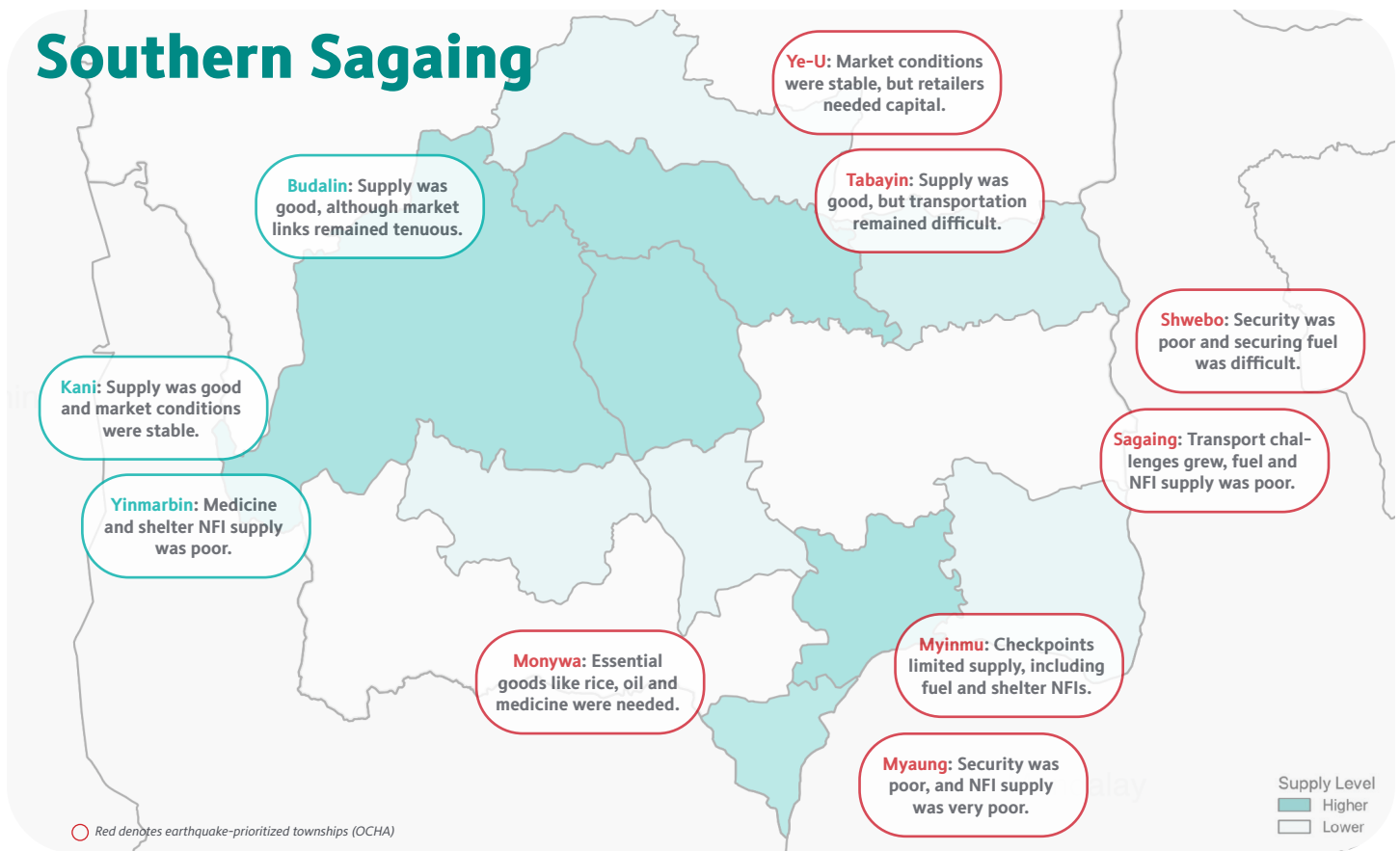


Chart 5.5 - Supply, by Month (Rakhine)



Southern Sagaing



Market Functionality

Market conditions were relatively stable in Sagaing in November, as closures remained rare but a number of markets continued to deal with poor security conditions. Trade with nearby villages continued, as did inter-township trade in most cases. Supply was stable in Sagaing Region in November and remained slightly better than in other regions monitored, particularly for foods. There were modest improvements in supply of meats and household NFIs in November, although **medicine** supply worsened slightly. Retailers in **Sagaing** and **Monywa** continued to report the most challenges, often related to **security** and **transportation** challenges—these limitations on shipping troubled retailers, despite stable shipping costs.

Chart 6.1. Operating Hours, by Market

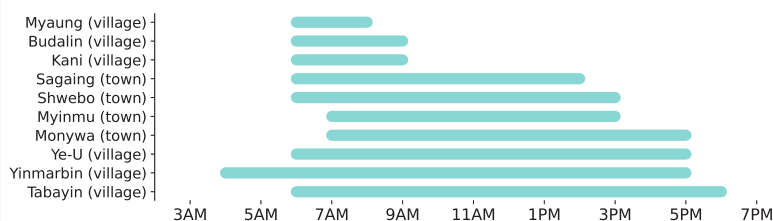


Chart 6.2. Portion of Markets with Closures (Sagaing)

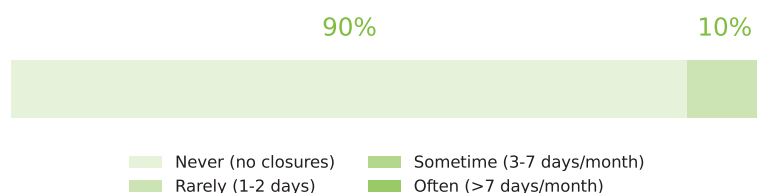


Chart 6.3 Supply, by Region

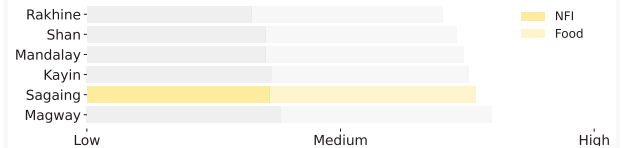


Chart 6.4. Supply, by Category (Sagaing)

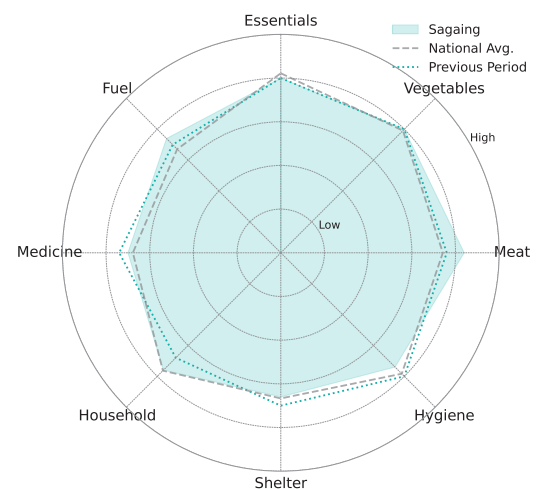
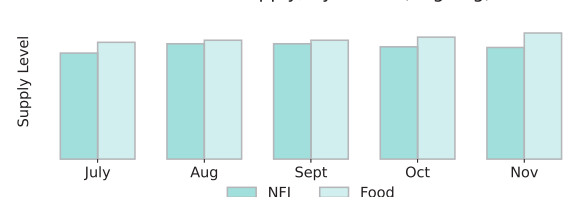
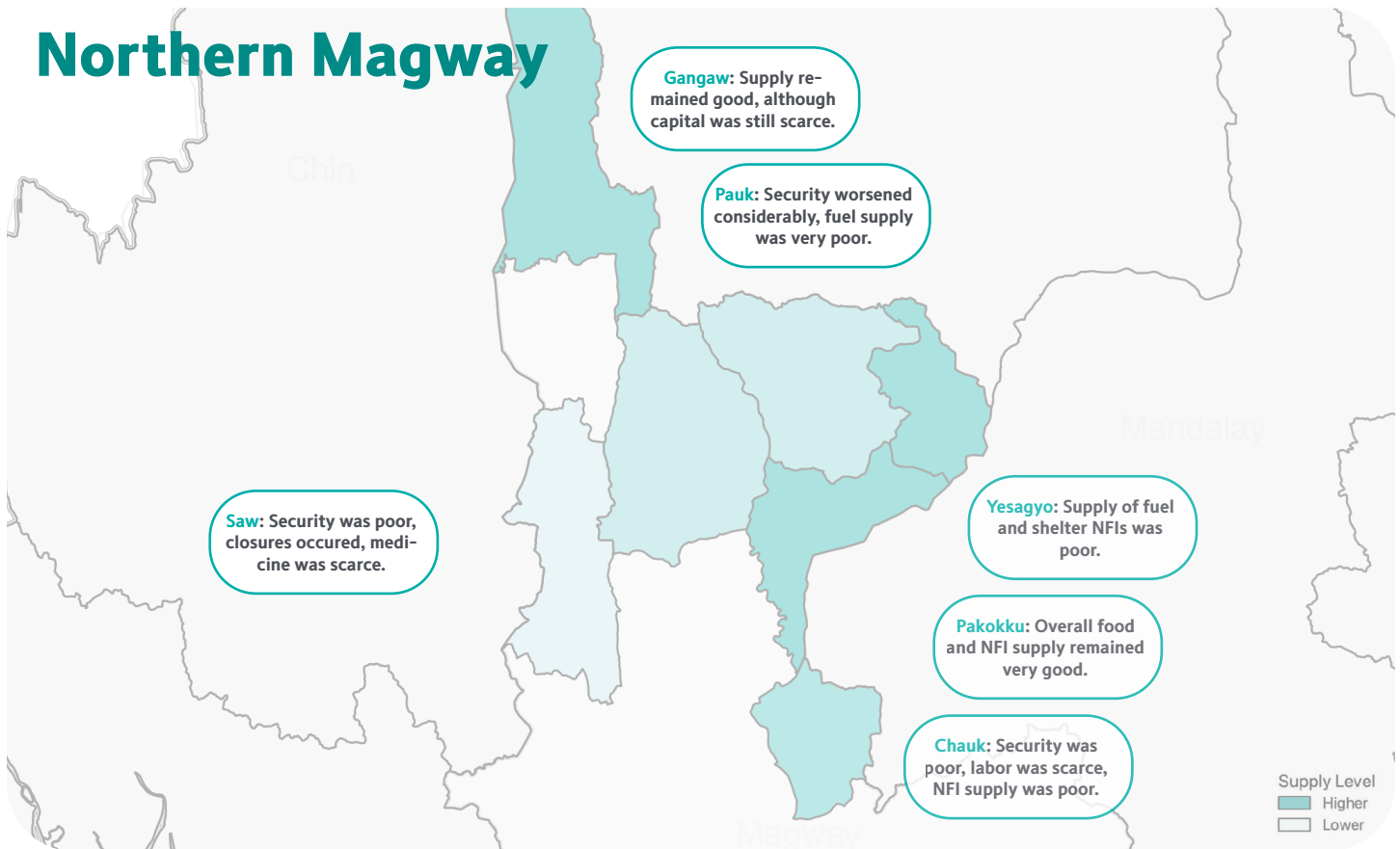


Chart 6.5 - Supply, by Month (Sagaing)



Northern Magway



Market Functionality

Security remained poor in northern Magway Region in late-November, and there was an increase in the number of temporary market **closures**. Markets in **Saw**, **Chauk** and **Myaing** stood out for particularly-poor security conditions in/around their markets, and in some cases inter-township **trade links** were temporarily severed. Despite these, challenges overall supply remained better—and even improved slightly—compared to other regions monitored. Improvements were due to better supply of medicine and hygiene NFIs. Retail challenges remained most common in Pauk where **transportation** of goods was very difficult; shipping costs were stable or rising in the region, according to retailers.

Chart 7.1. Operating Hours, by Market

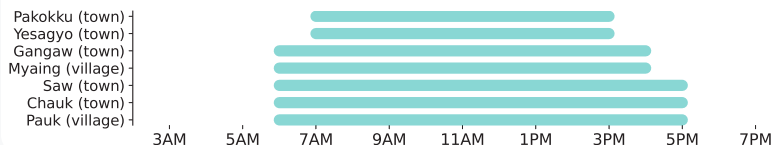


Chart 7.2. Portion of Markets with Closures (Magway)

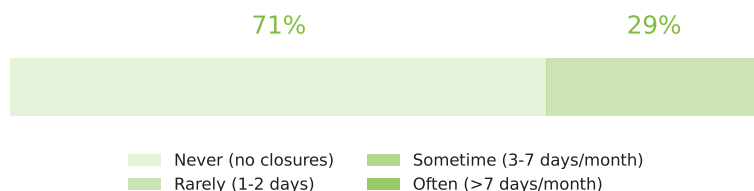


Chart 7.3 Supply, by Region

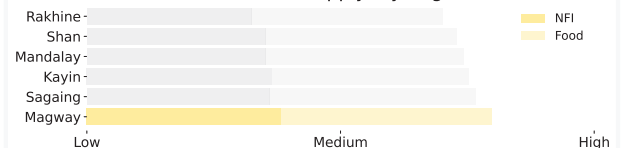


Chart 7.4. Supply, by Category (Magway)

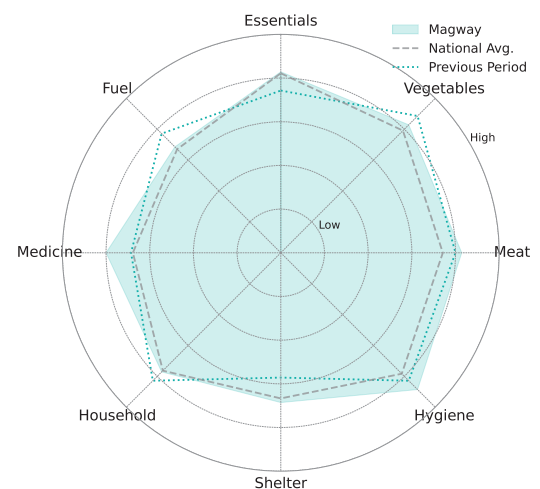
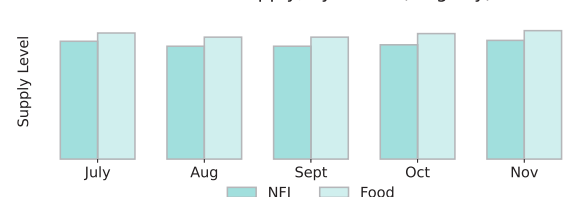
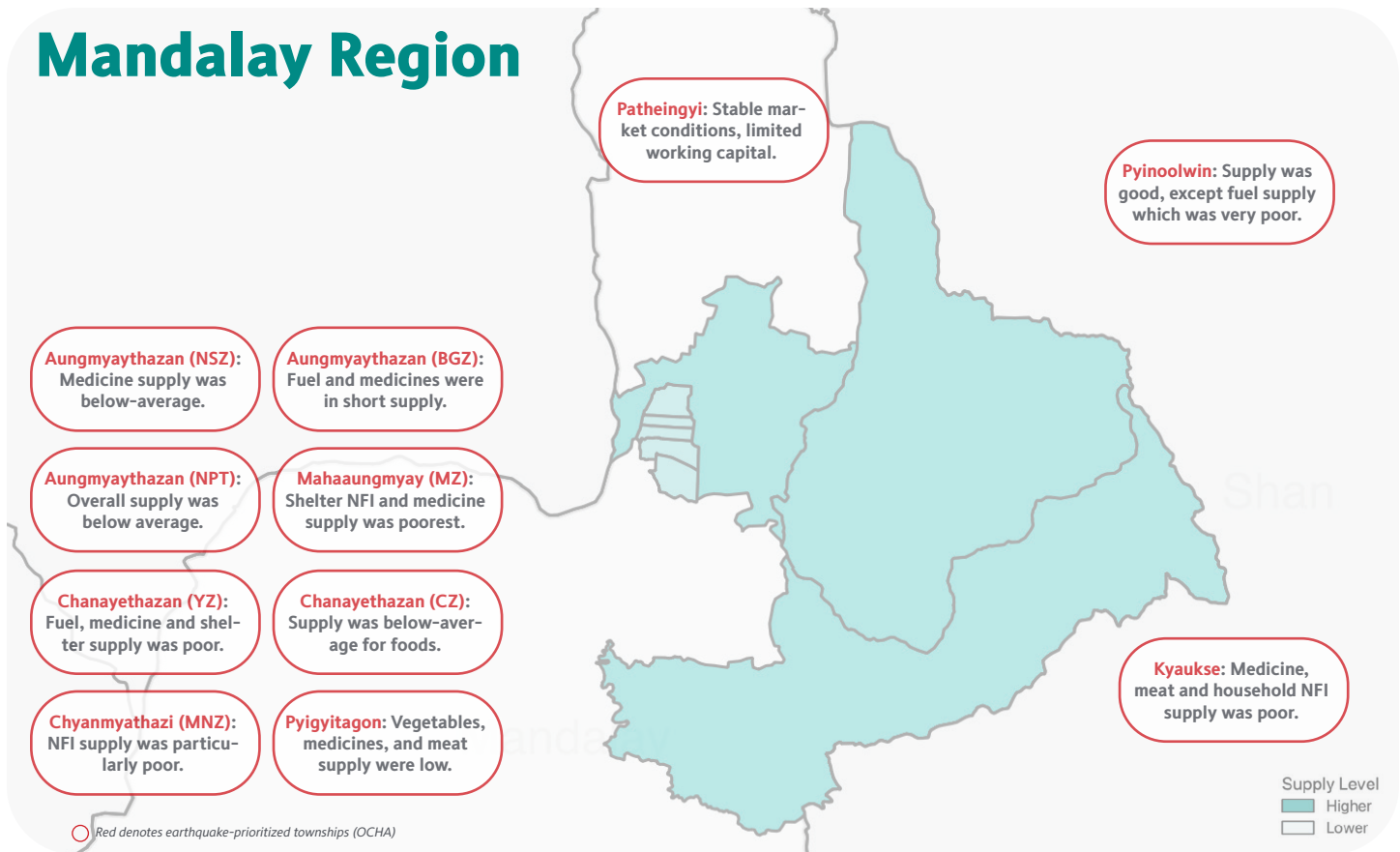


Chart 7.5 - Supply, by Month (Magway)



Mandalay Region



Market Functionality

Security conditions remained generally-good and closures were rare in the Mandalay Region markets. Shipping links were generally intact. That said, supply of **foods** and **NFIs** worsened in late-November. Supply declined across all categories of foods and NFIs monitored with the sole exception of hygiene NFIs; decreases were most significant for **medicine** and **meat/fish**. Retailers reported stable shipping costs, and the number of retailers reporting challenges remained fewer than in other states and regions monitored. However, markets in some locations like **Kyaukse** and **Patheingyi** reported difficult checkpoints and limited **working capital**.

Chart 8.1. Operating Hours, by Market

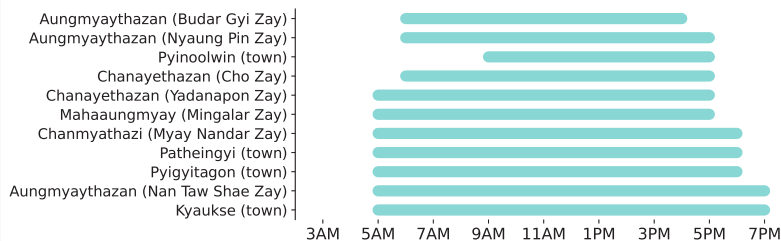


Chart 8.2. Portion of Markets with Closures (Mandalay)

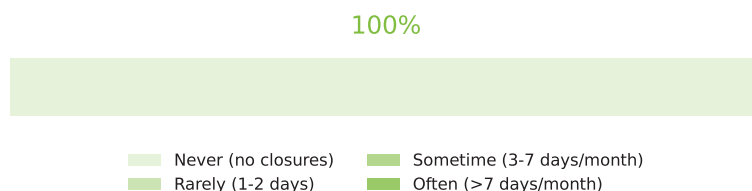


Chart 8.3 Supply, by Region

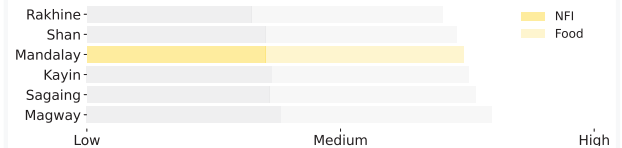


Chart 8.4. Supply, by Category (Mandalay)

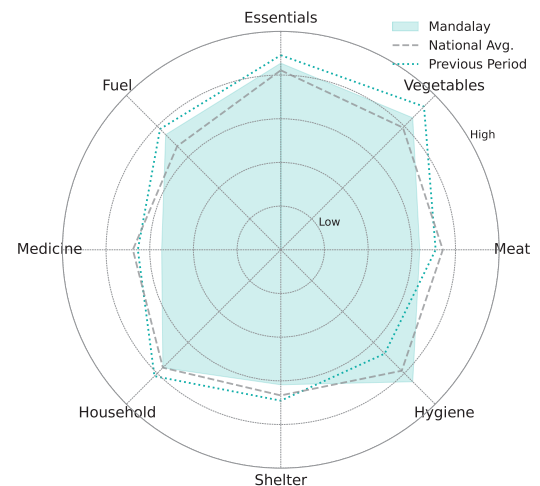
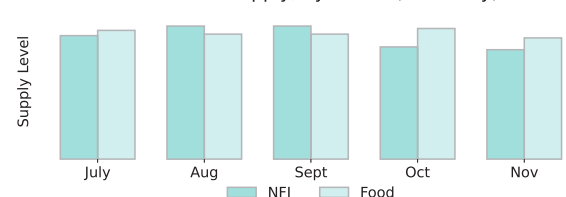
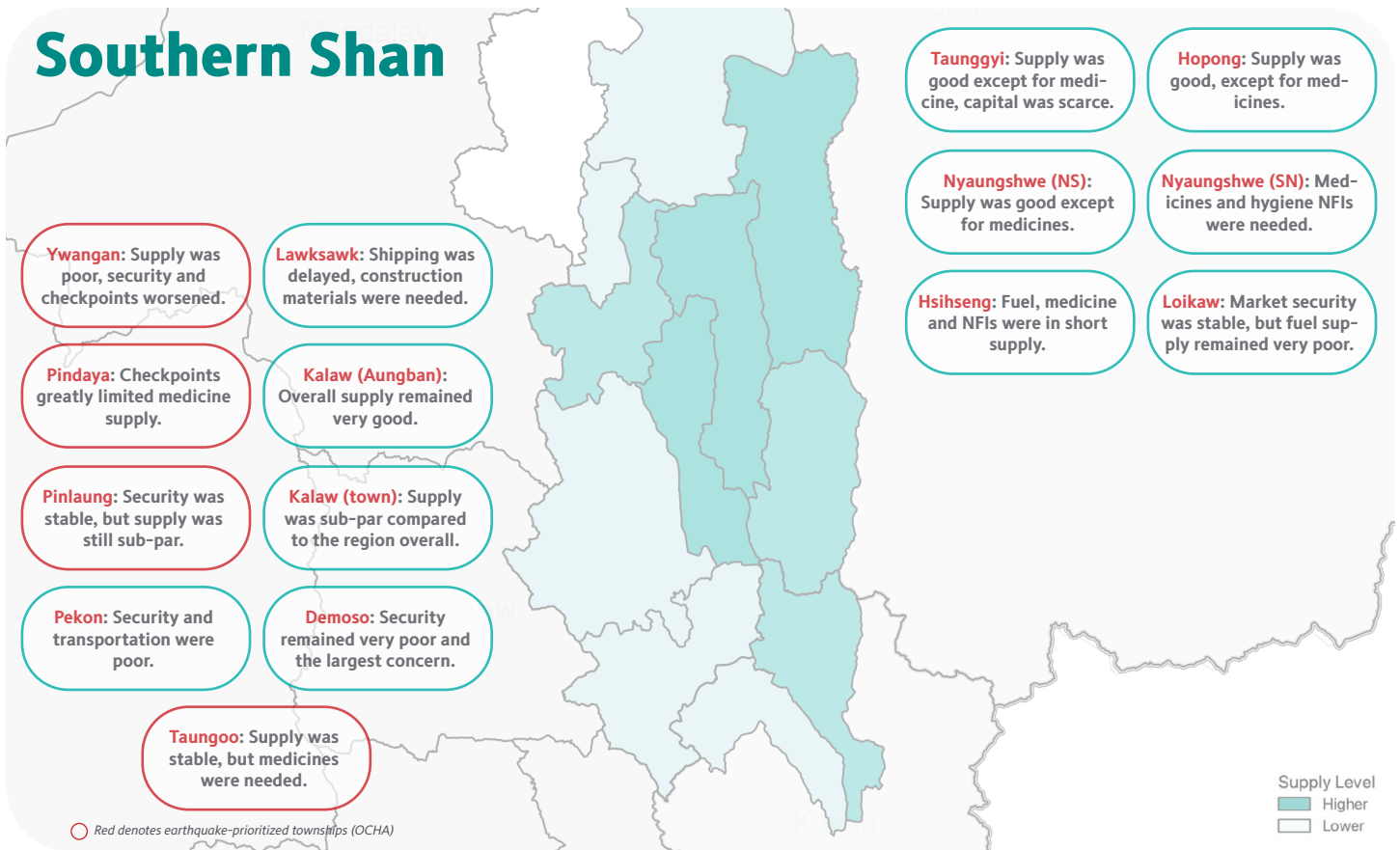


Chart 8.5 - Supply, by Month (Mandalay)



Southern Shan



Market Functionality

Security conditions were stable in/around markets, and closures remained rare. However, **market links** continued to be very tenuous in some townships. Food and NFI supply was fairly stable, and shelter NFI supply improved slightly. Retail challenges remained most severe in the western townships of **Demoso, Ywangan, Lawksawk** and **Pindaya**. These challenges often related to **security, transportation** and particularly the inspection or confiscation of goods at checkpoints.

Chart 9.1. Operating Hours, by Market

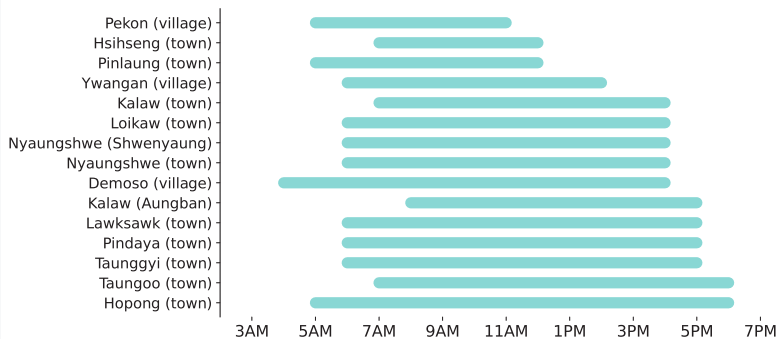


Chart 9.2. Portion of Markets with Closures (Shan)

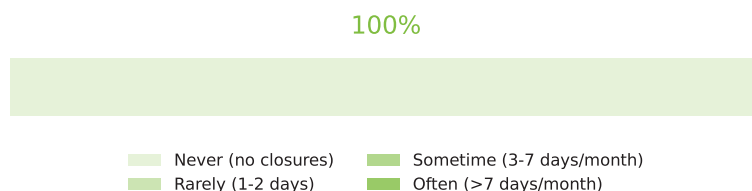


Chart 9.3 Supply, by Region

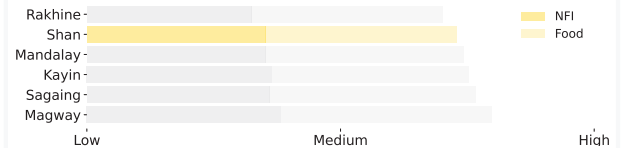


Chart 9.4. Supply, by Category (Shan)

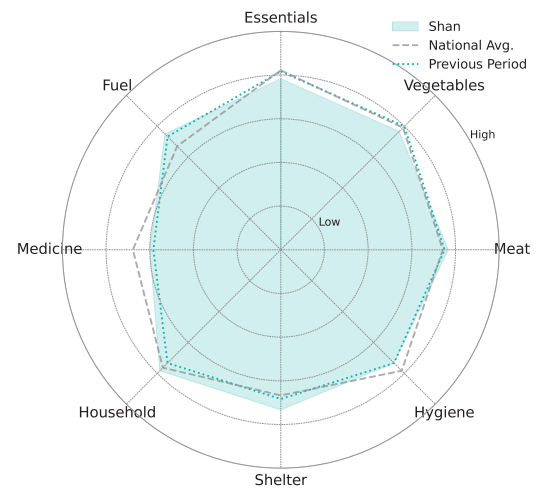
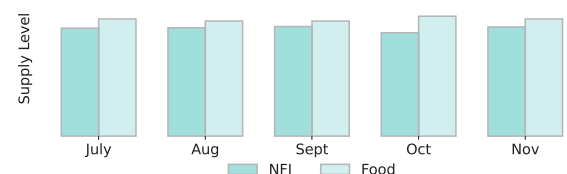
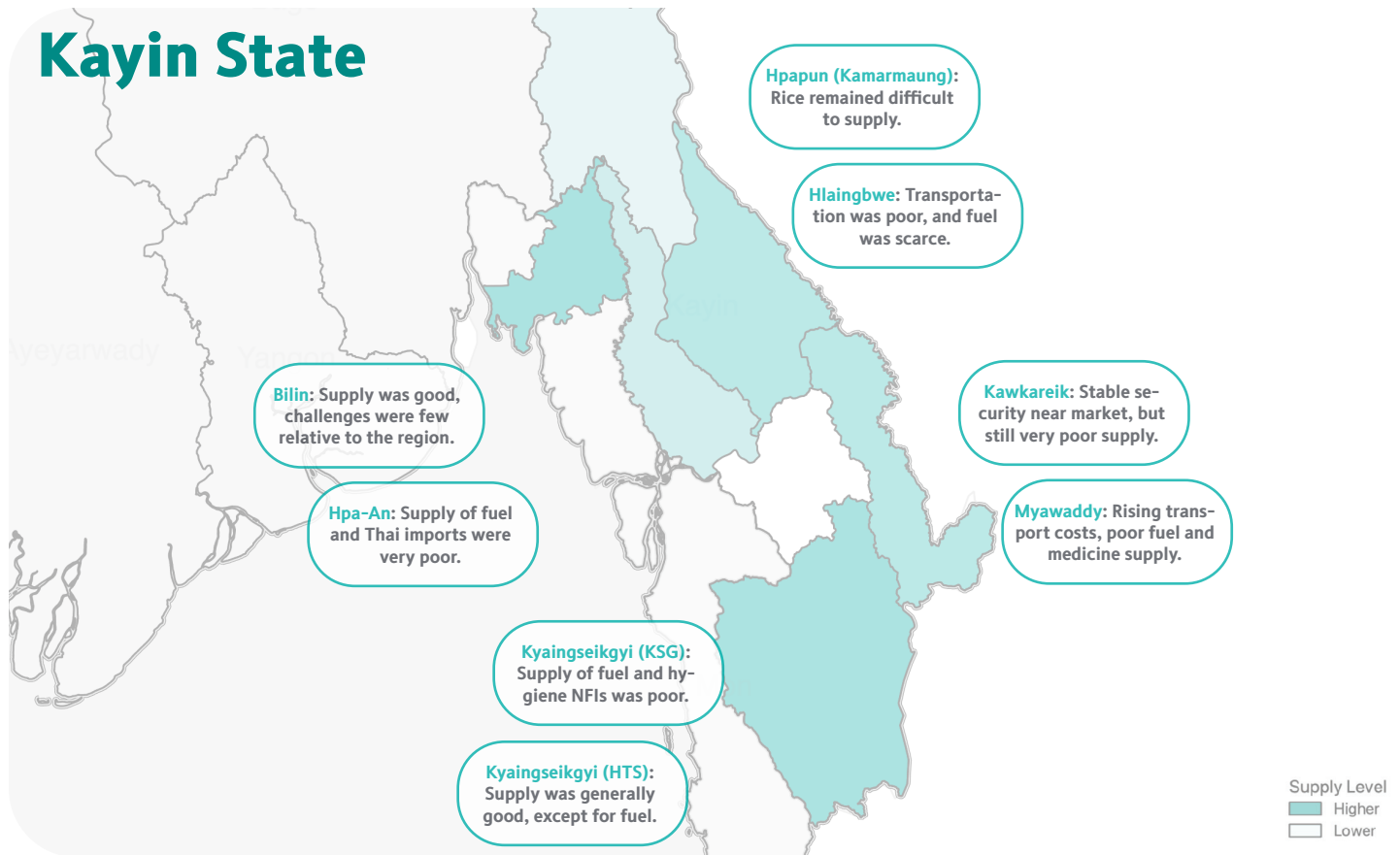


Chart 9.5 - Supply, by Month (Shan)



Kayin State



Market Functionality

Market conditions remained stable in the region—particularly compared to some periods in the recent past—and market closures were fairly rare. Moreover, inter-township trade was stable and intact. Food and NFI supply were overall fairly stable, but **fuel** supply worsened significantly. Retail challenges were reduced in several markets monitored, although some significant challenges remained, particularly in **Hlaingbwe** and **Myawaddy**; these challenges related largely to **transportation** difficulties and lack of access to the usual imports from Thailand. There were some reports of rising shipping costs, but overall they appeared stable.

Chart 10.1. Operating Hours, by Market

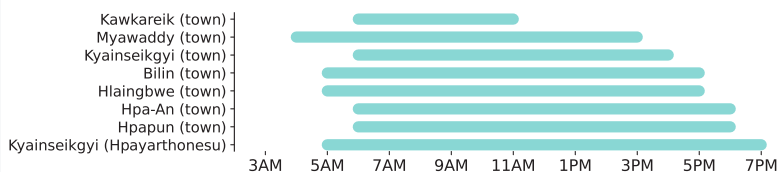


Chart 10.2. Portion of Markets with Closures (Kayin)

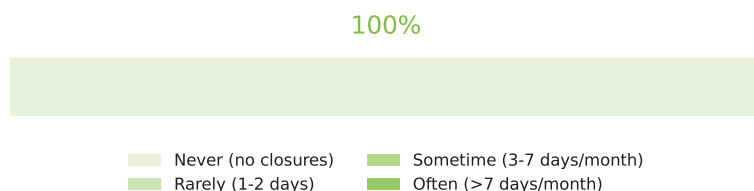


Chart 10.3 Supply, by Region

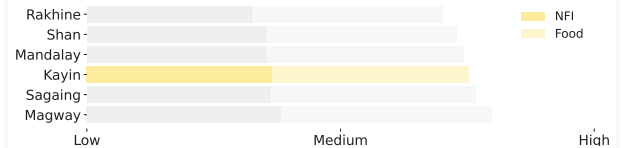


Chart 10.4. Supply, by Category (Kayin)

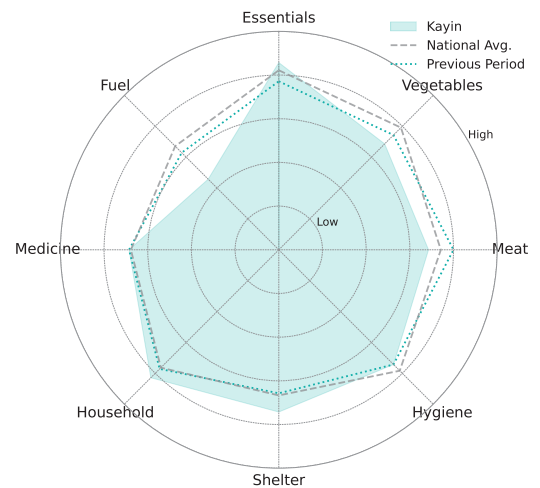
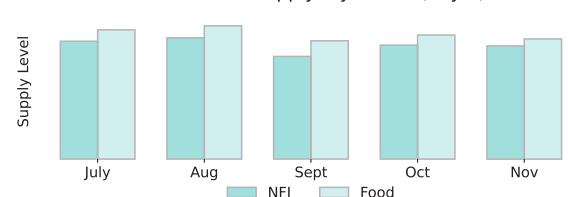


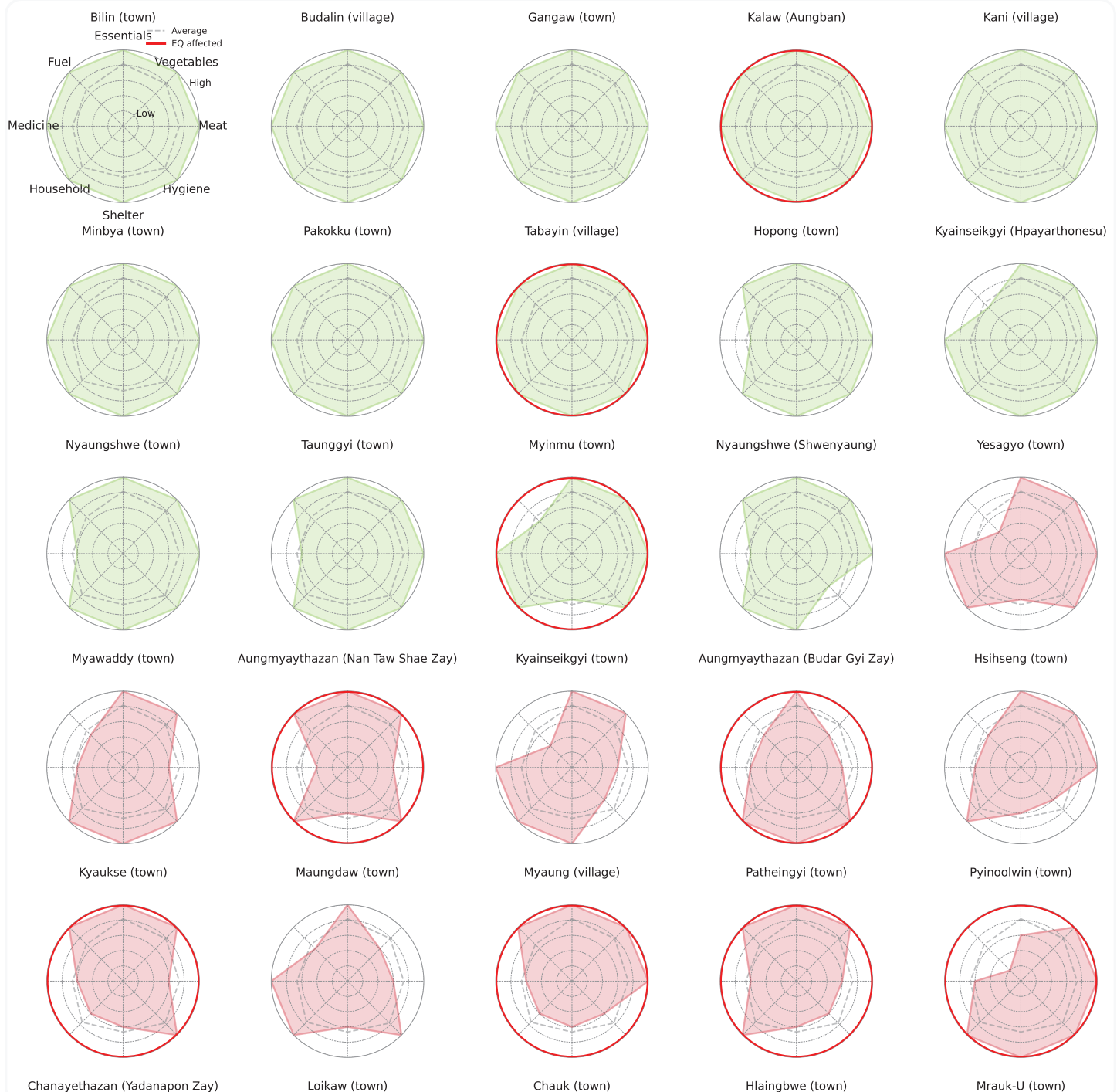
Chart 10.5 - Supply, by Month (Kayin)



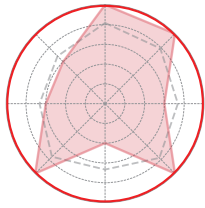
Township Supply

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:

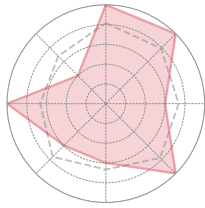
- Group C** - Markets with very good overall food and NFI supply. There were fewer such markets in November than in October;
- Group A** - Markets with above-average supply of NFIs and particularly foods. The most common supply deficits in these markets related to fuel and medicine;
- Group D** - Markets with below-average supply of foods and particularly NFIs. These markets displayed significant shortages across multiple NFI categories;
- Group B** - Markets with extremely-poor overall supply. There were fewer such markets, but their deficits also grew more severe in November.



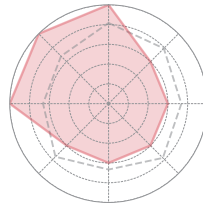
Chanayethazan (Yadanapon Zay)



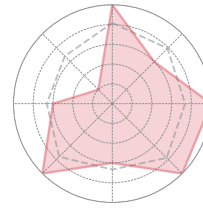
Loikaw (town)



Chauk (town)



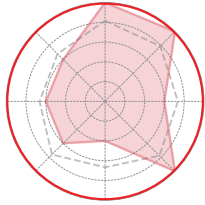
Hlaingbwe (town)



Mrauk-U (town)



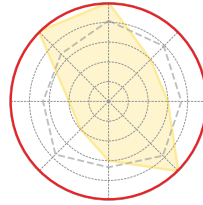
Chanmyathazi (Myay Nandar Zay)



Myebon (town)



Pyigyitagon (town)



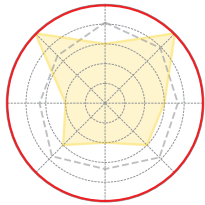
Pauk (village)



Ponnagyun (village)



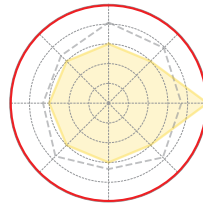
Mahaangmyay (Mingalar Zay)



Myaing (village)



Shwebo (town)



Hpa-An (town)



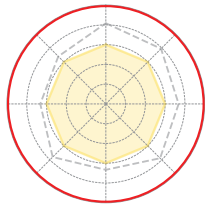
Pauktaw (village)



Aungmyaythazan (Nyaung Pin Zay)



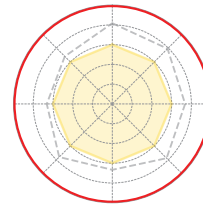
Chanayethazan (Cho Zay)



Demoso (village)



Kalaw (town)



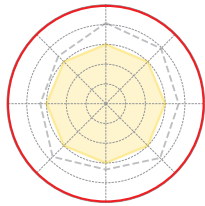
Kyauktaw (town)



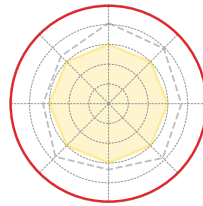
Pekon (village)



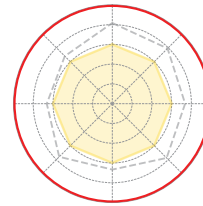
Pindaya (town)



Pinlaung (town)



Taungoo (town)



Ye-U (village)



Hpapun (town)



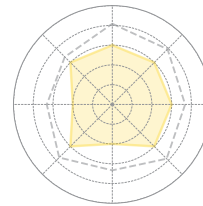
Rathedaung (village)



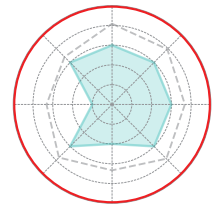
Saw (town)



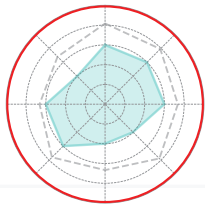
Yinmarbin (village)



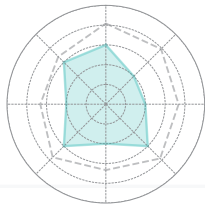
Monywa (town)



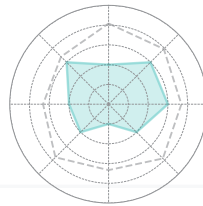
Sagaing (town)



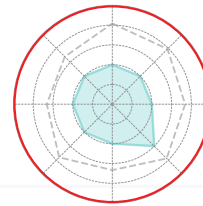
Lawksawk (town)



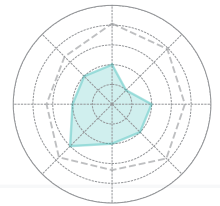
Sittwe (town)



Ywangan (village)



Kawkareik (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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