

October 2025

Rapid Market Assessment

This Rapid Market Assessment (RMA) provides data on market function, supply, activity, and logistics in 59 earthquake/non-earthquake townships across 8 states/regions. Data were collected October 21-31 via observation and KIIs with 116 retailers. Reports available at www.themimu.info/market-analysis-unit.



KEY FINDINGS

- **Many markets were safe and closures were rare**, indeed closures much less common than earlier in the year;
- **Yet security was poor in 29% of markets monitored**, often markets in Rakhine State or Magway Region;
- **Food supply improved marginally across regions** as monsoon season passed and road conditions improved;
- **But NFI supply worsened in most regions**, in part due to new difficulties importing goods from Thailand;
- **Medicine supply was frequently poor** due to shipping restrictions, and shelter NFI supply was low post-monsoon;
- **Supply remained poorest in Rakhine and Shan States**, where the contraction in NFI supply was felt the most;
- **Thai border issues hurt medicine/hygiene NFI supply** according to retailers in Kayin State;
- **Security and shipping remained paramount concerns** as traders feared injury and paid more move goods.

Overview

Market operations remained stable in October, although shipping grew more difficult and NFI supply contracted. Market closures were rare and many markets were secure, yet most retailers said checkpoints hampered trade. Conflict hot-spots like Hsisheng continued to face serious challenges stocking goods. Border trade issues with Thailand may be partly to blame for poorer NFI supply, even as retailers pursued workarounds. Food supply improved marginally as monsoon season receded, but supply remained poorest in Rakhine and Shan States. Shipping and checkpoint-related difficulties were still retailers' top concerns, and these in turn impacted supply.

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

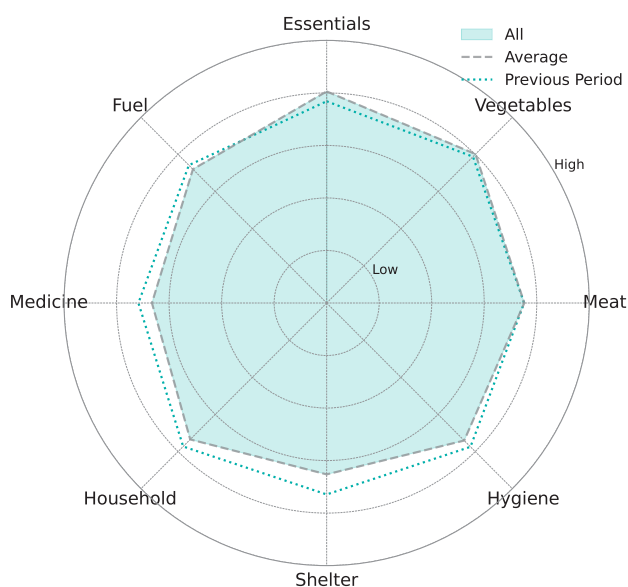
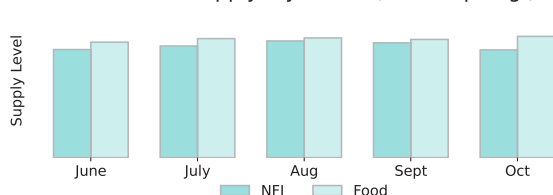


Chart 1.2 - Supply, by Month (Township Avg.)



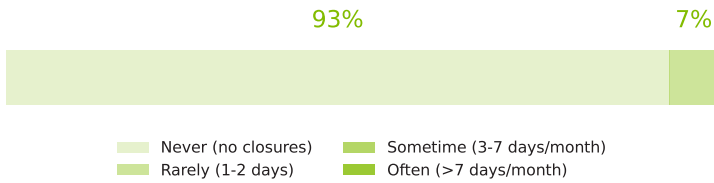
What to Watch

- The impact of Thai **border** trade limits on supply remains unclear as retailers seek workarounds;
- It also remains to be seen to what extent tighter **NFI** supply will impact prices in various regions;
- Supply of **foods** and particularly **vegetables** should begin to fall in some markets as seasons change;
- There is little sign that supply of **medicines** will improve in the near future given shipping challenges.

Market Functionality

Trade links remained largely intact in October, and market damage and closures were rare (**Chart 2**). However, security remained poor in nearly one-third of markets monitored, many of which were in Rakhine State or Magway Region.

Chart 2. Portion of Markets with Closures (All)



29% Markets described as "unsafe" or "very unsafe."
2% Markets reporting recent damage.

98% Markets serving nearby villages.
76% Markets serving nearby townships.

Supply of Goods

Slightly-improved food supply coming out of the monsoon season contributed to a larger number of townships with good overall supply relative to past months (**Chart 3**). That said, more than one-quarter of markets monitored had significantly-poorer supply, particularly markets like Kawkareik, Ywangan and Lawksawk. The variety of goods on offer at markets remained relatively good, even in cases where the stock or level of supply was subpar (**Chart 4**).

Chart 3. Supply of Foods and NFIs

Red denotes Earthquake-prioritized townships (OCHA)

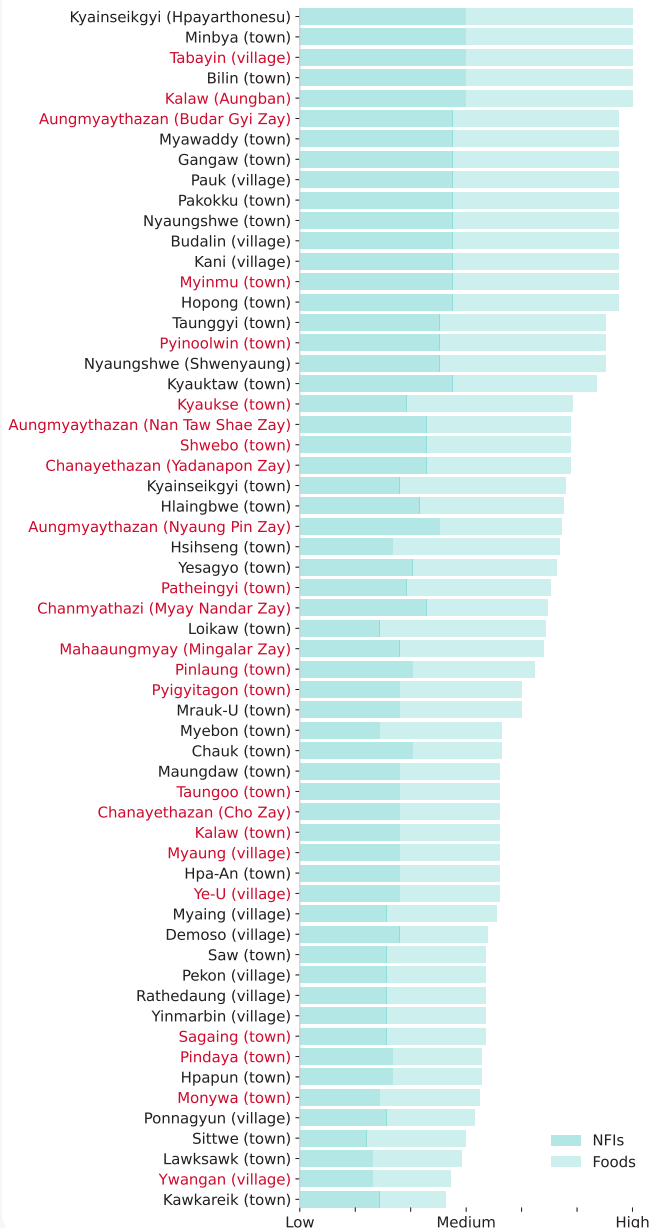
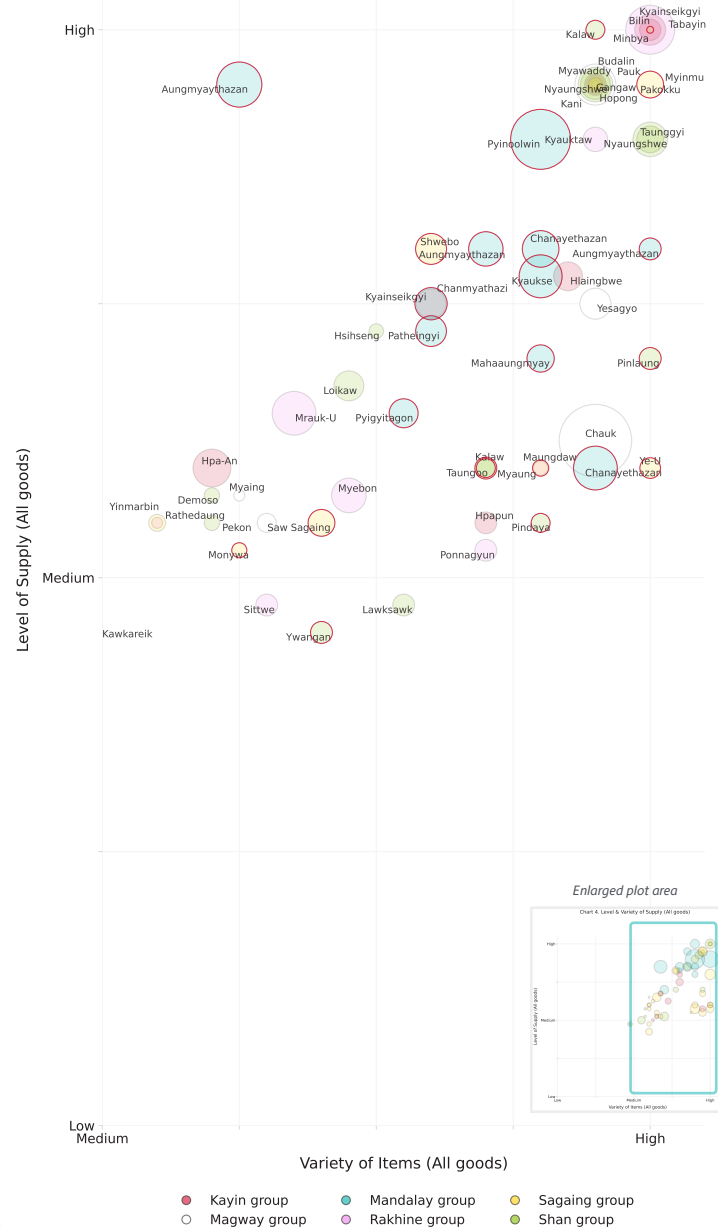
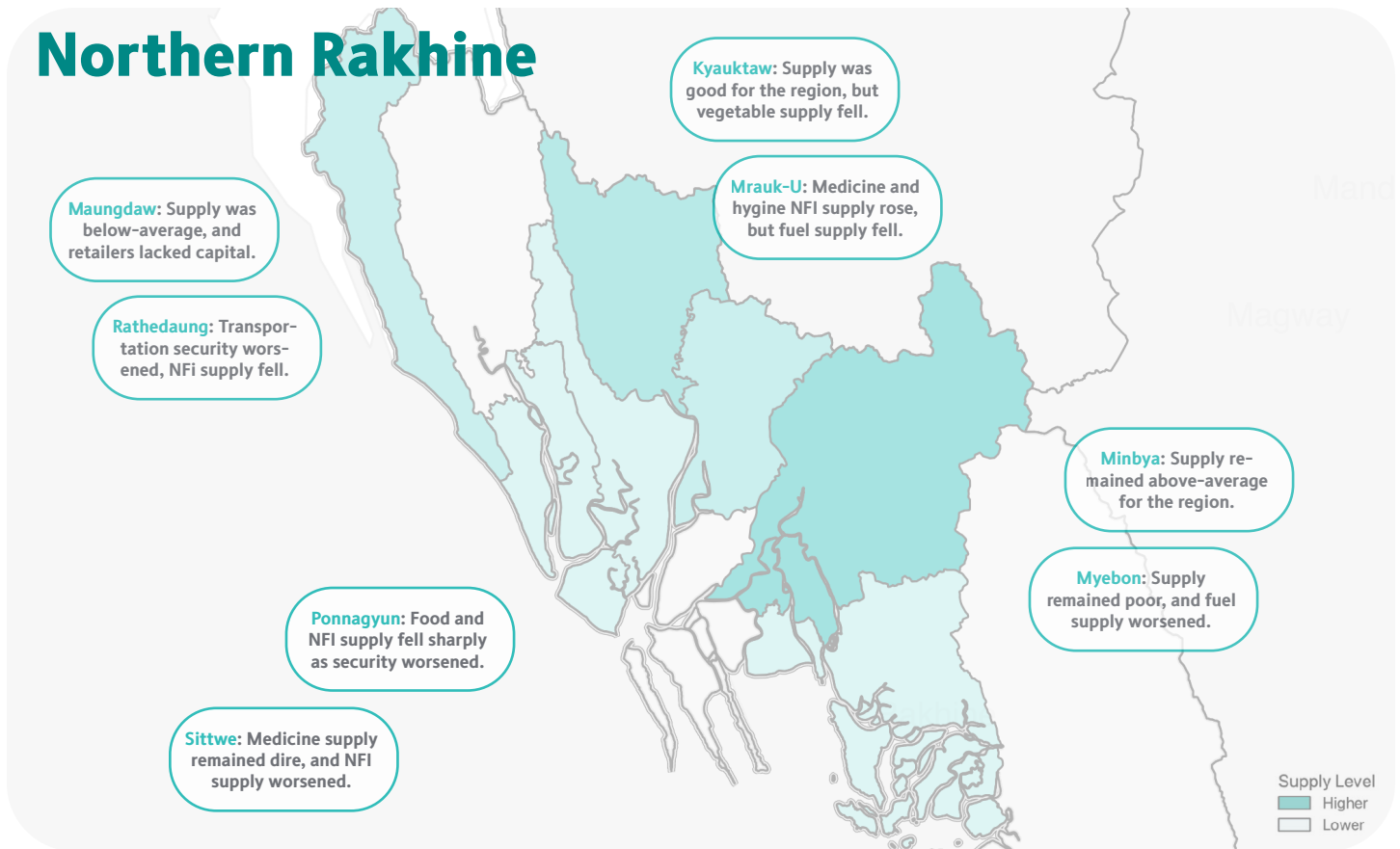


Chart 4. Level & Variety of Supply (All goods)

Bubble size indicates market size



Northern Rakhine



Market Functionality

Markets remained open in Rakhine State at the end of October, and market closures were rare. That said, **security** worsened slightly as retailers described markets in Sittwe, Ponnagyun, Mrauk-U and Kyauktaw as unsafe. Markets continued to trade with surrounding villages and townships with the exception of **Sittwe**. Reports of retail challenges were more common in Rakhine than in other regions, and **Mrauk-U** retailers in particular cited challenges related to working capital and transportation. Transportation charges were generally stable, but they rose in Mrauk-U and Ponnagyun. Food supply was stable in October, although supply of **vegetables** and **household NFIs** remained below-average compared to other regions. NFI supply declined across categories, particularly for **fuel** and **medicines**.

Chart 5.1. Operating Hours, by Market

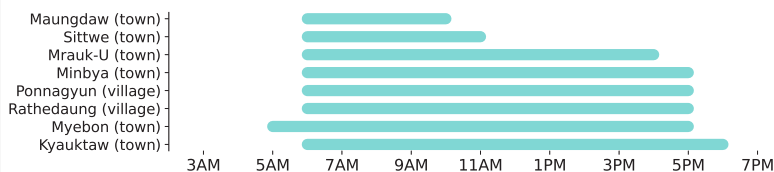


Chart 5.2. Portion of Markets with Closures (Rakhine)

100%

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

Chart 5.3 Supply, by Region

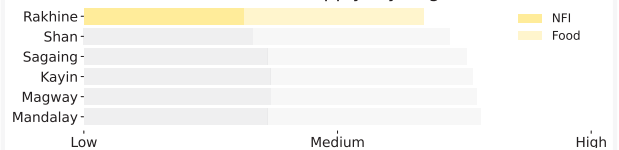


Chart 5.4. Supply, by Category (Rakhine)

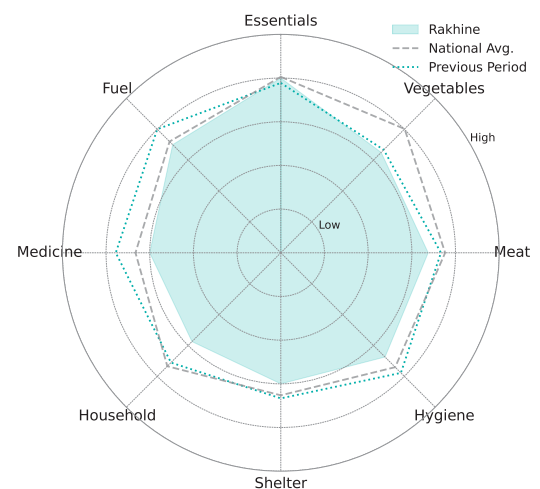
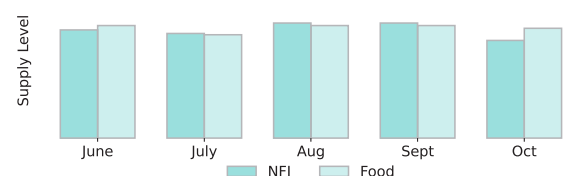
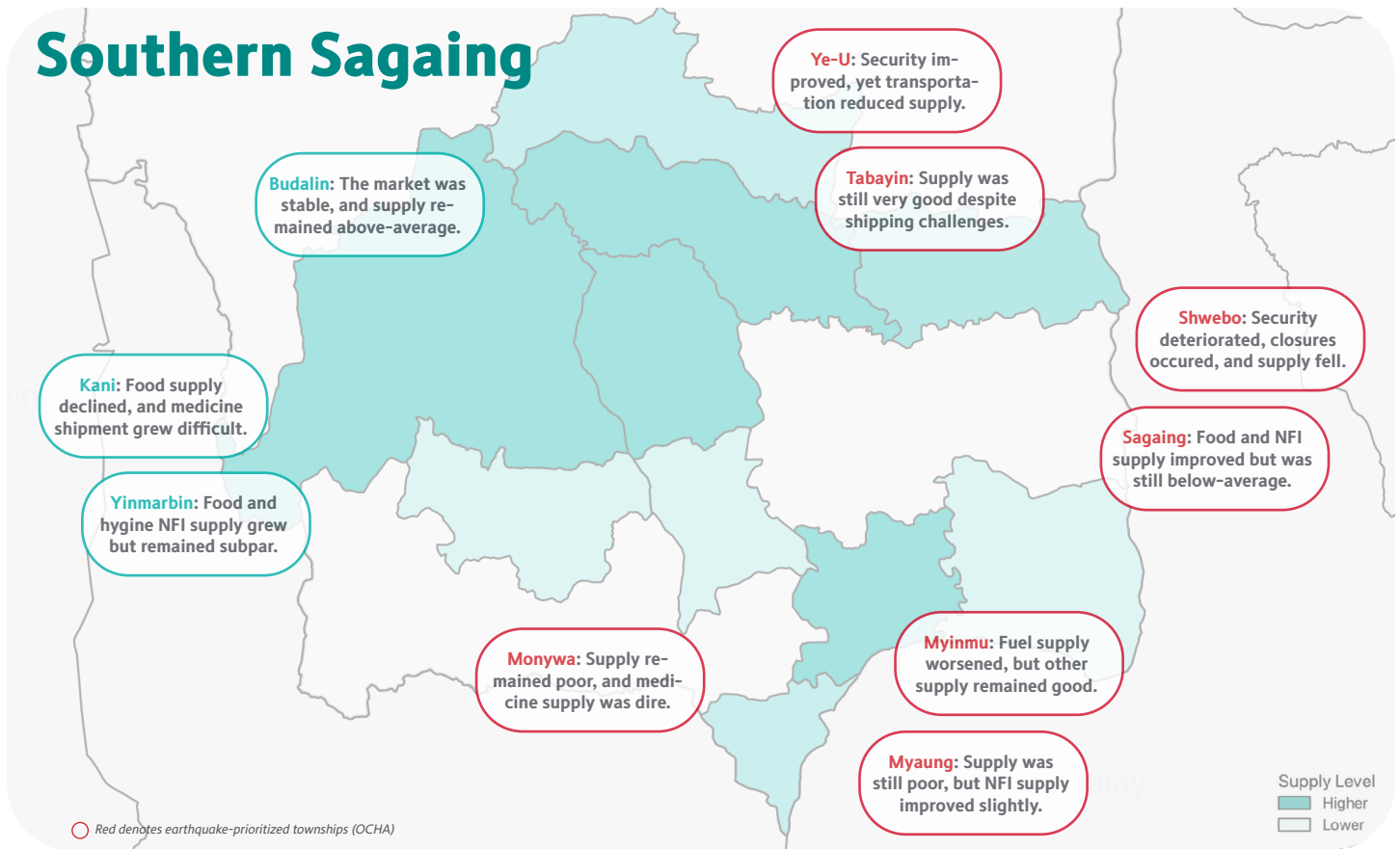


Chart 5.5 - Supply, by Month (Rakhine)



Southern Sagaing



Market Functionality

Markets were open and operational, and closures remained fairly rare. Security was stable although still poor in some markets monitored, and security in/near **Shwebo** market was very poor. Smaller markets in Myaung, Kani and Budalin remained somewhat isolated from elsewhere, but other markets traded with neighboring townships and villages. Retailers across townships reported notable challenges, typically related to the the impact of **security** on the **transportation** of goods like **medicine**. Food and NFI supply was average compared to other regions monitored. Supply of food and hygiene NFIs improved with the passing of monsoon, but **fuel** supply worsened notably. Since late-August food supply was overall fairly stable in the region.

Chart 6.1. Operating Hours, by Market

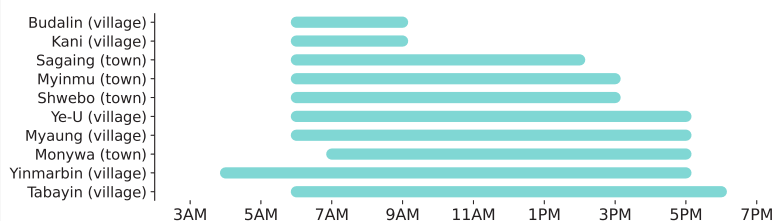


Chart 6.2. Portion of Markets with Closures (Sagaing)

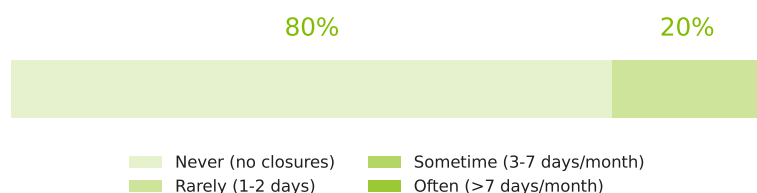


Chart 6.3 Supply, by Region

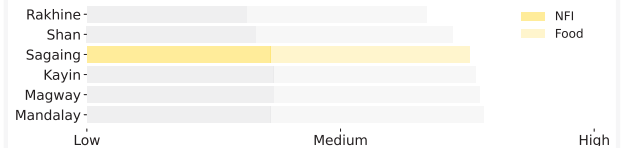


Chart 6.4. Supply, by Category (Sagaing)

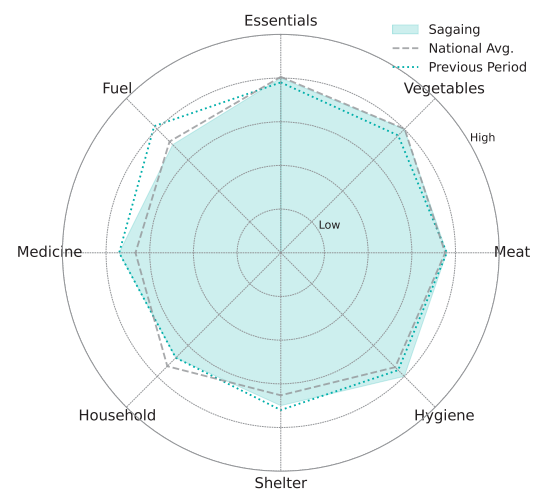
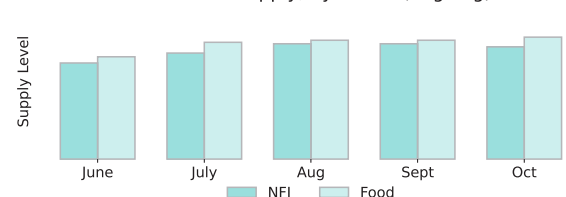
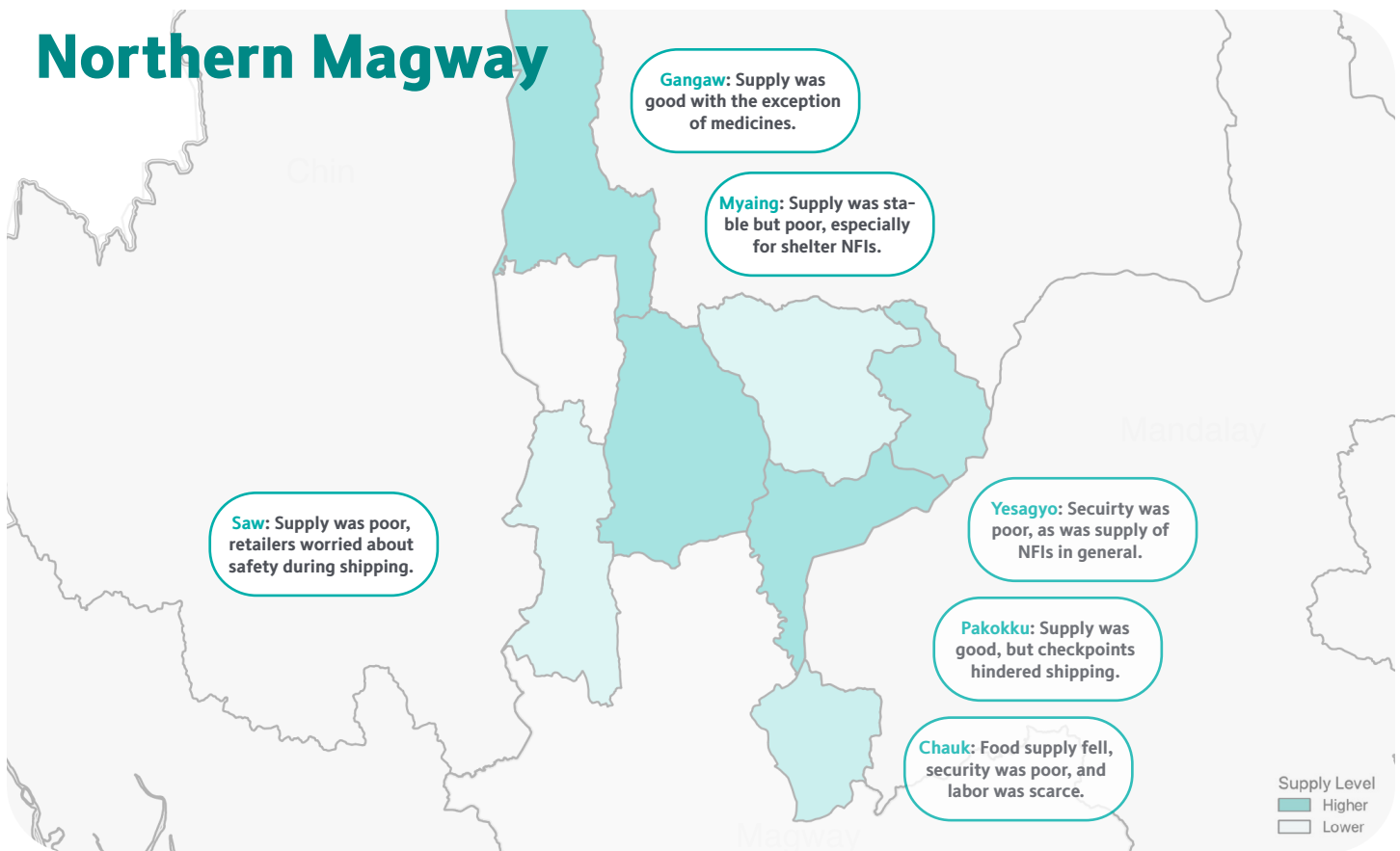


Chart 6.5 - Supply, by Month (Sagaing)



Northern Magway



Market Functionality

Security was poor in five-of-seven markets monitored in northern Magway Region placing it among the most-insecure market environments. Retailers nonetheless continued to operate, and closures were rare. Shipping between townships remained intact, although it was particularly challenging in **Pauk** and **Myaing** due to poor security. Retailers in Saw, Pakokku, and Pauk cited major transportation difficulties related to checkpoints, while those in Gangaw had access to supply—partly via westward trade from India via Chin State—but lacked **cash** and working capital to buy and hold stock. Supply in the region was fairly stable in recent months despite the poor security environment and remained so in October. Supply of **essential foods** and **shelter NFIs** was below-average, while fuel, hygiene NFIs and some foods were slightly above-average.

Chart 7.1. Operating Hours, by Market

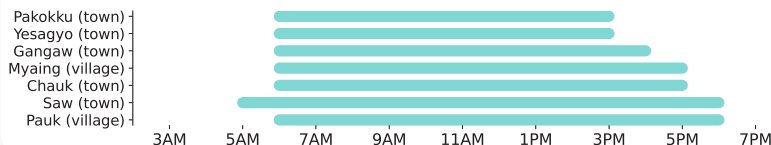


Chart 7.2. Portion of Markets with Closures (Magway)

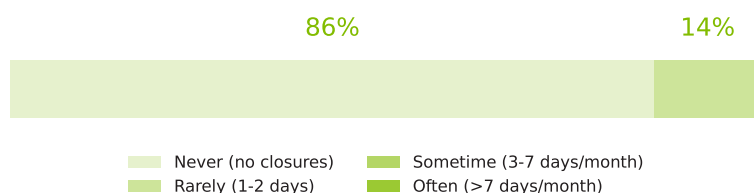


Chart 7.3 Supply, by Region

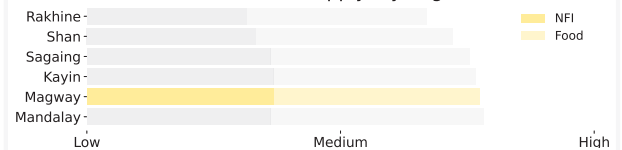


Chart 7.4. Supply, by Category (Magway)

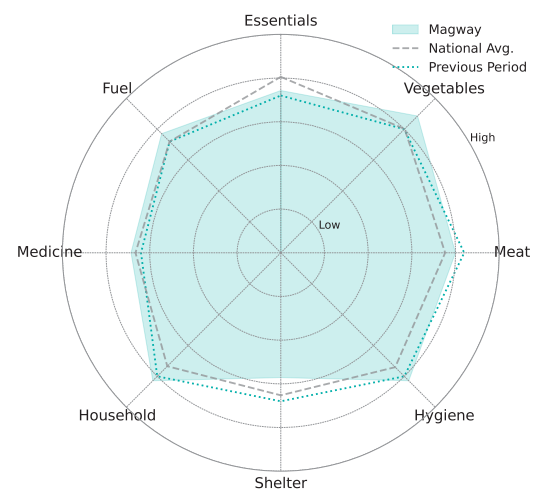
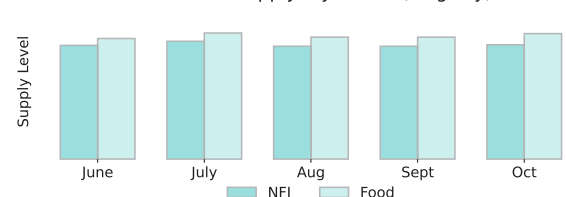
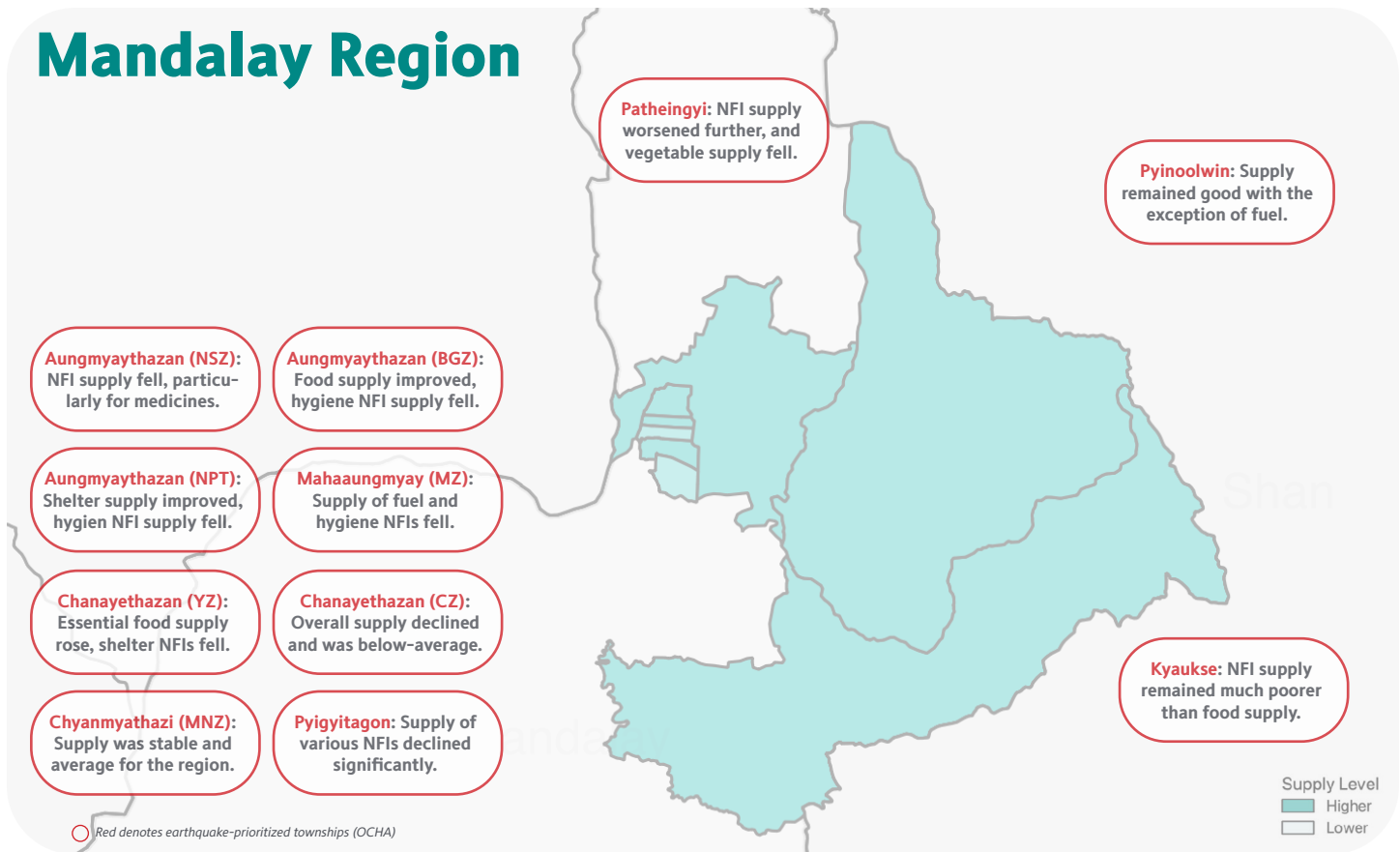


Chart 7.5 - Supply, by Month (Magway)



Mandalay Region



Market Functionality

Security remained stable in/around Mandalay Region markets, and there were no closures in the markets monitored. Almost all markets continued to see regular trade with neighboring villages and townships. Retailers in Mandalay reported fewer challenges than those in other regions, although retailers in **Kyaukse** and **Patheingyi** stood out for challenges related to **transportation** and access to **cash**. Supply in Mandalay remained best among the regions monitored, but only marginally-so. **NFI** supply dipped significantly in October, possibly due to reduced trade at Myanmar's border with Thailand. Food supply improved due largely to improvements in essential food supply.

Chart 8.1. Operating Hours, by Market

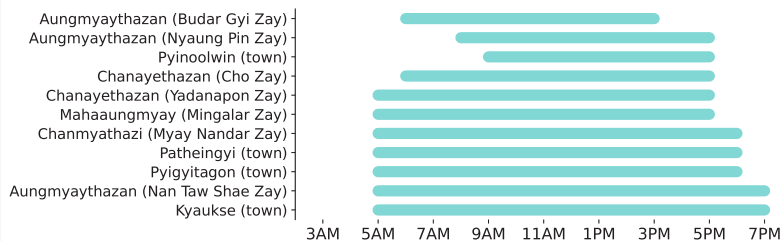


Chart 8.2. Portion of Markets with Closures (Mandalay)

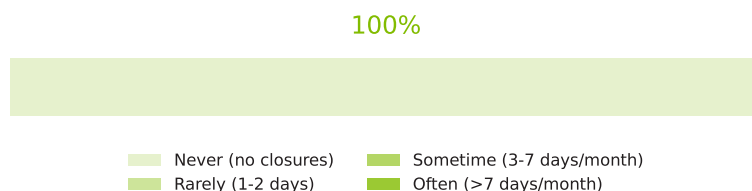


Chart 8.3 Supply, by Region

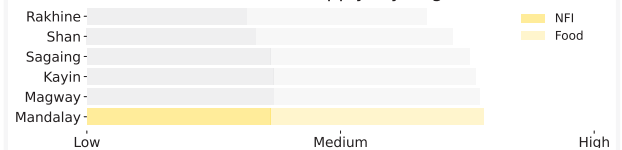


Chart 8.4. Supply, by Category (Mandalay)

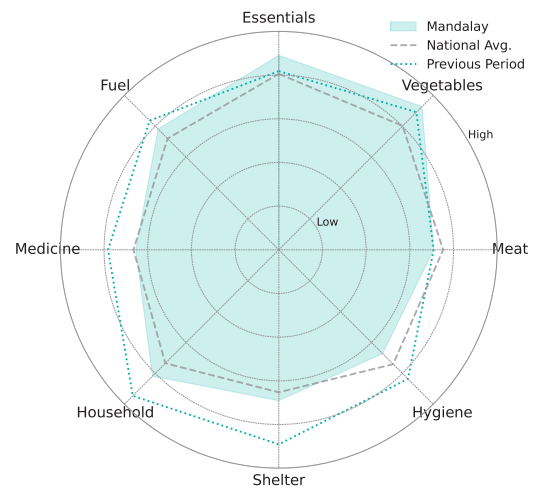
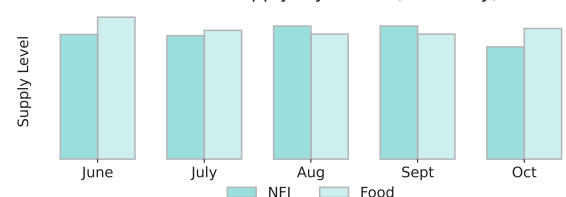
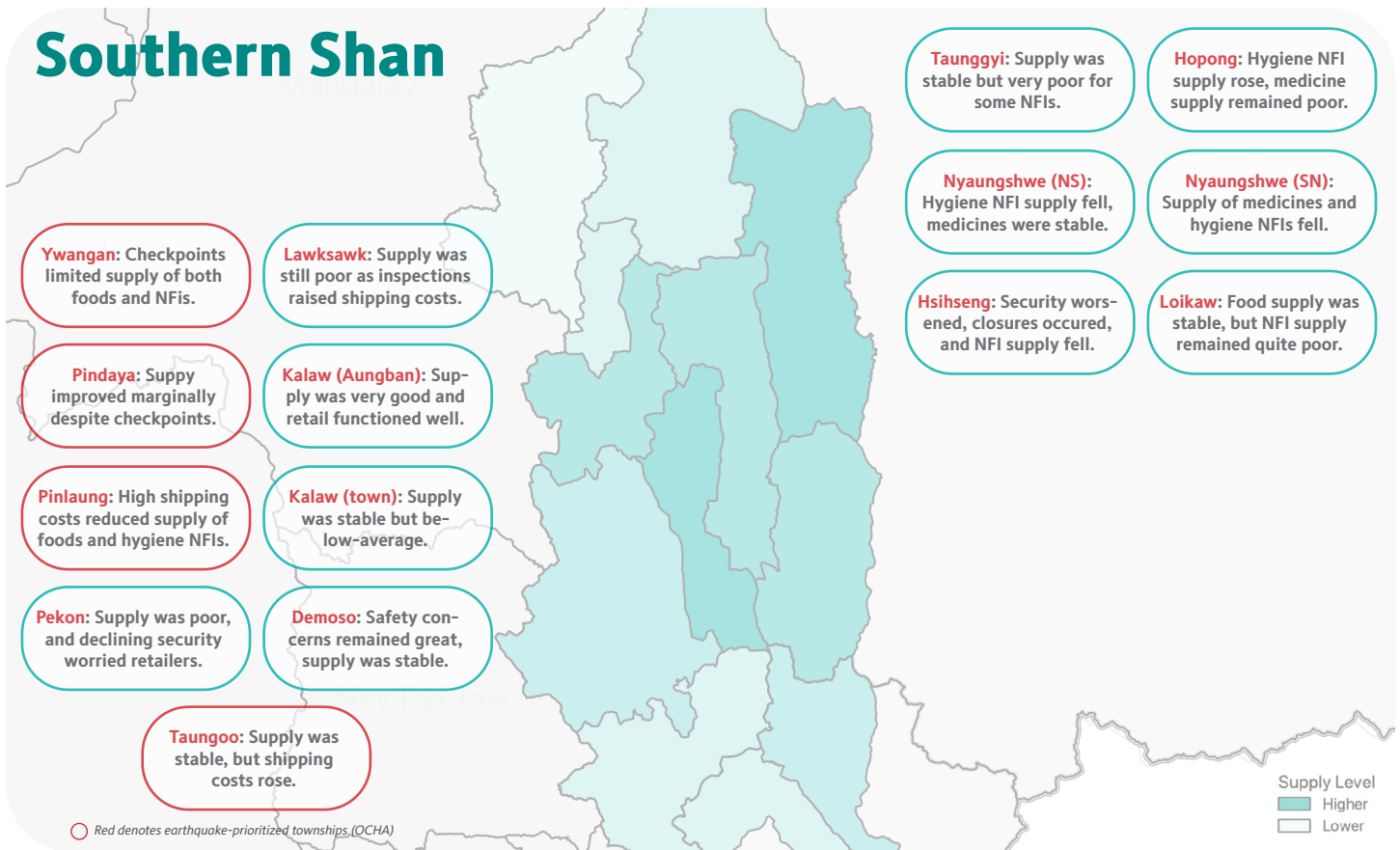


Chart 8.5 - Supply, by Month (Mandalay)



Southern Shan



Market Functionality

Market security was generally good in the region, yet it remained poor in some locations like **Pekon**, **Hsihseng** and **Demoso**. That said, market challenges were great across the region as retailers even in stable markets like **Ywangan** and **Pindaya** reported major **shipping** challenges due to checkpoints. Food supply improved but remained slightly worse than other regions monitored. Poor access to **medicines** and **shelter NFIs** conspired to push already-low **NFI** supply even lower.

Chart 9.1. Operating Hours, by Market

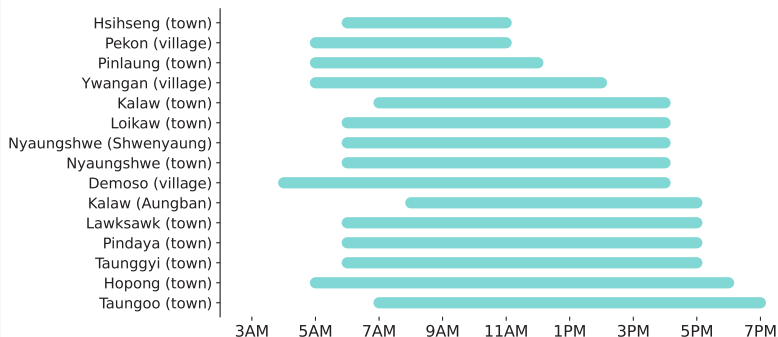


Chart 9.2. Portion of Markets with Closures (Shan)

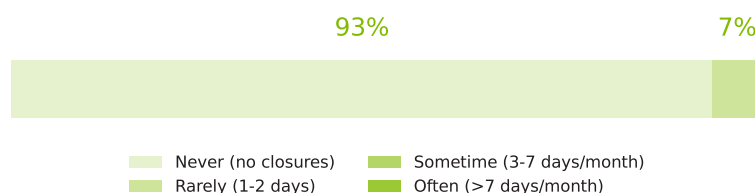


Chart 9.3 Supply, by Region

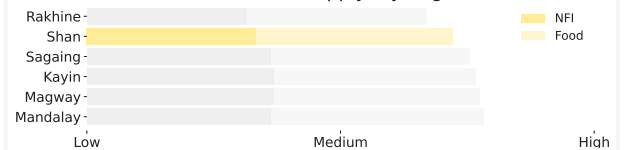


Chart 9.4. Supply, by Category (Shan)

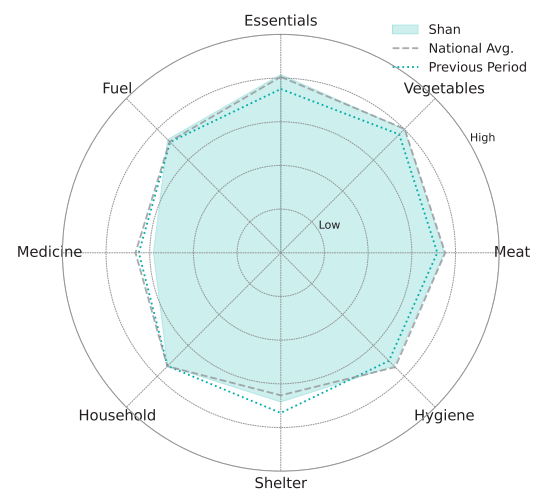
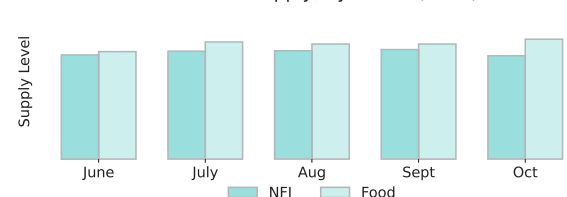
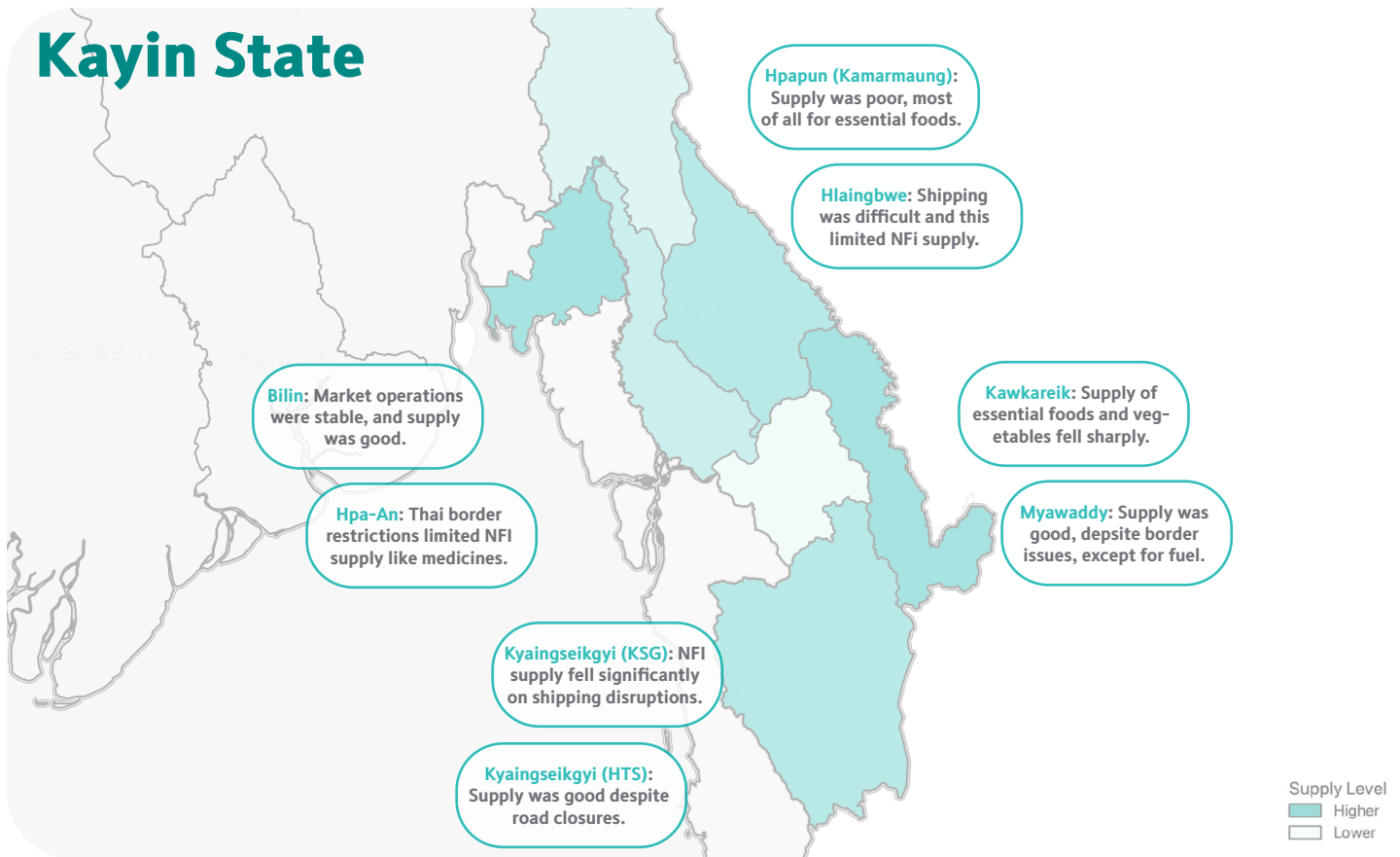


Chart 9.5 - Supply, by Month (Shan)



Kayin State



Market Functionality

Markets were operational in Kayin State in October, but trade disruptions at the Thai border impacted supply at markets throughout the state. Security conditions in/around markets were stable relative to previous months, and closures were uncommon. However, retailers reported a variety of significant challenges. **Shipping** was a major challenge for **Hlaingbwe** retailers, and **border trade** restrictions complicated access to **medicines** and **hygiene NFIs** according to retailers in several markets. Shipping costs rose in regional trade hubs like Myawaddy, Hpa-An and Kyainseikgyi as retailers paid additional fees to ensure access to goods that used to be much easier to resupply. Overall supply was stable and better than some other regions, but **fuel** supply remained below-average.

Chart 10.1. Operating Hours, by Market

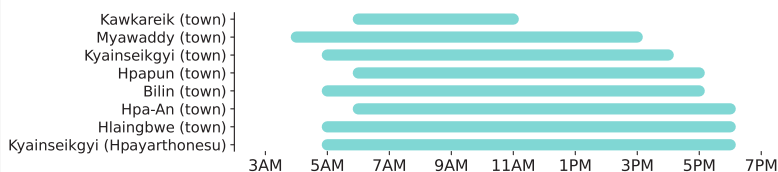


Chart 10.2. Portion of Markets with Closures (Kayin)

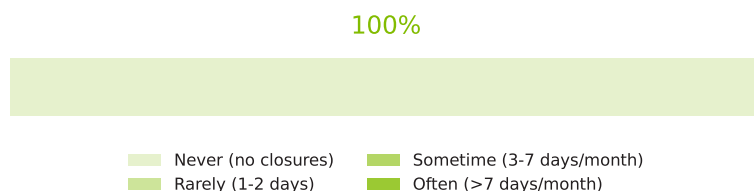


Chart 10.3 Supply, by Region

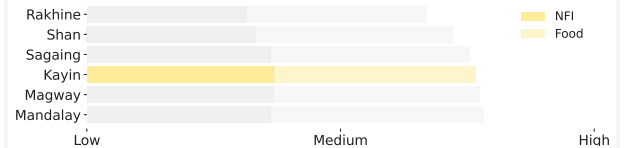


Chart 10.4. Supply, by Category (Kayin)

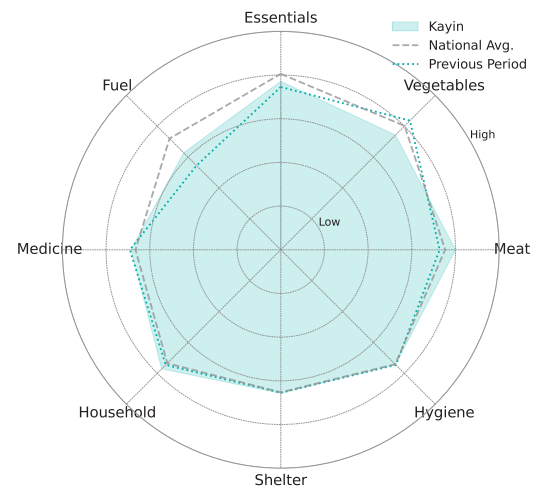
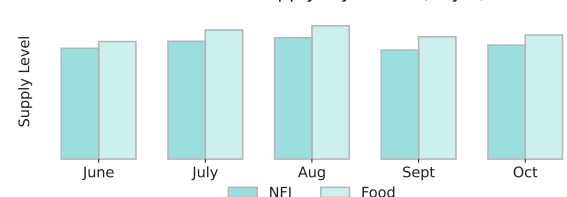
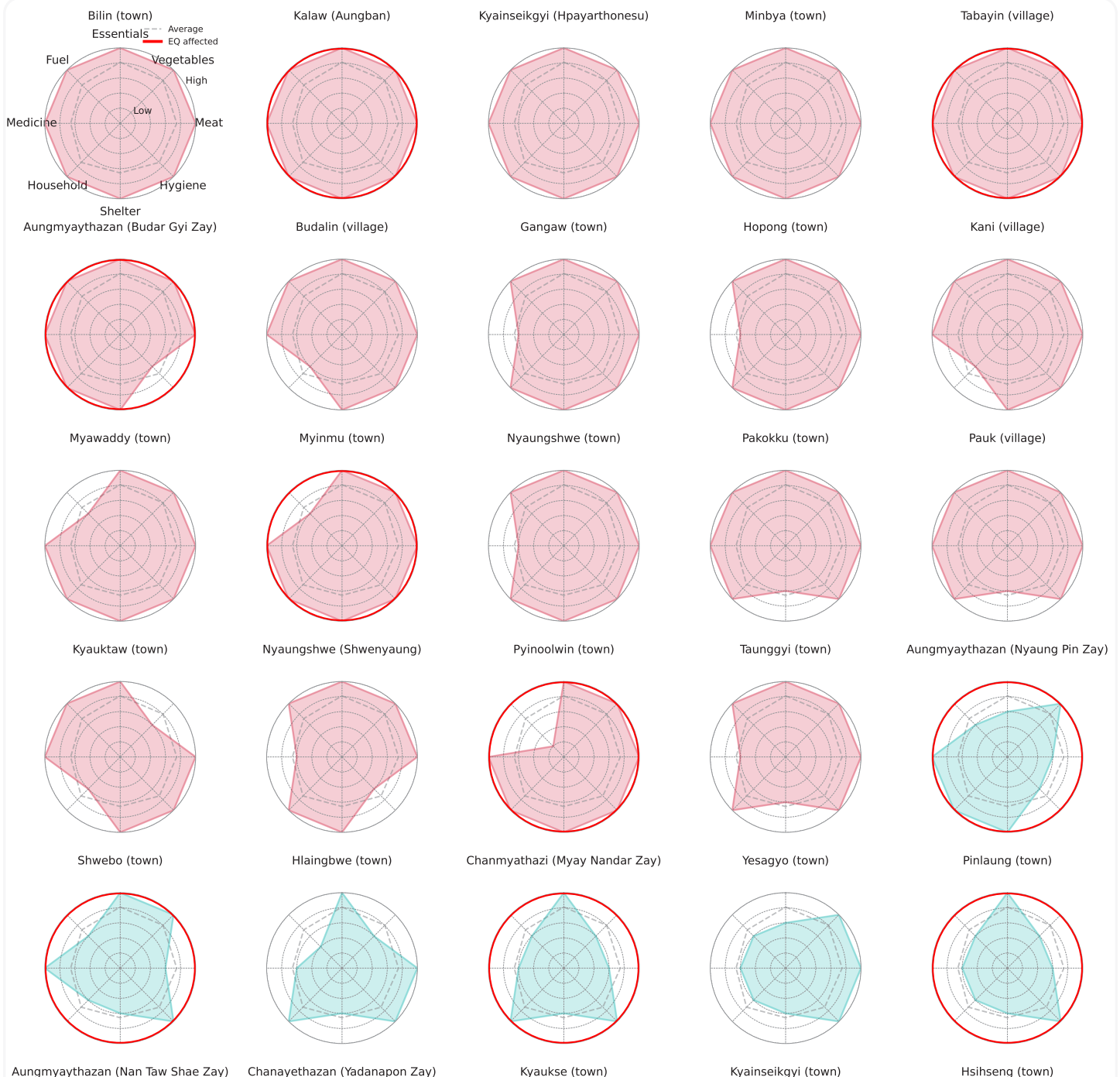
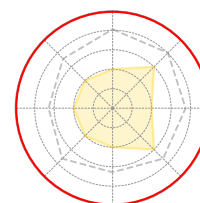


Chart 10.5 - Supply, by Month (Kayin)



- **Group A** - Townships with very good food supply as well as significantly-above-average NFI supply. The number of such townships shrank in October;
- **Group B** - Townships with notable deficits in both food and NFI supply but in which supply of hygiene NFIs was fairly good post-monsoon;
- **Group C** - Townships with relatively-good supply of foods but which had below-average supply of NFIs and in particular hygiene NFI stocks;
- **Group D** - Townships with below-average supply of food and NFIs and which lagged considerably in supply of essential foods like rice, oil and pulses.





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).

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