

# Rapid Market Assessment

*This Rapid Market Assessment (RMA) was conducted following the March 28 earthquake in Myanmar. It provides township-level data on market functions, activity, supply, and logistics in three earthquake-affected regions. Data were collected through observation and KIIs with retailers in 25 markets during April 1-10. Reports available at [www.themimu.info/market-analysis-unit](http://www.themimu.info/market-analysis-unit).*

## KEY FINDINGS

- **Most markets monitored were functional**, yet some in Sagaing, Mandalay, and Bago were greatly affected;
- **Retailers were slow to return to some markets** after the earthquake, such as Pindaya and Pinlaung;
- **Overall food and NFI supply was fairly decent**, but variation was significant and supply in Taungoo was poor;
- **Supply of NFIs was generally worse than foods**, and supply of medicine and fuel was particularly poor;
- **Supply of foods was poorer in Shan than elsewhere**, although supply of shelter NFIs was relatively good;
- **Food supply was relatively good in Southern Sagaing**, although fuel supply was quite poor;
- **Supply of medicine and NFIs was poor in Mandalay**, although food supply was relatively good;
- **Shipping costs were stable or rising across regions**, and this was a major concern for retailers.

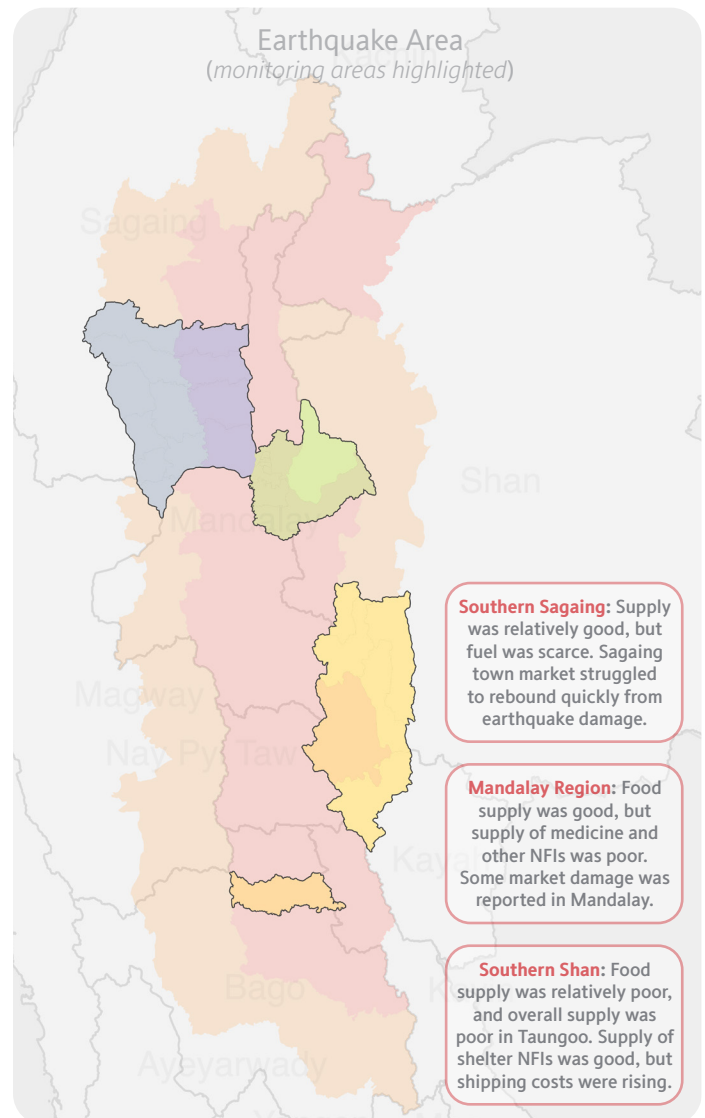
## Overview

**Market Functions – Most markets monitored were intact and operational, but some suffered serious earthquake damage.** The majority of markets monitored were undamaged and free of closures, but exceptions were noted in Sagaing town and Mandalay's Zay Cho. Markets operated throughout the day, but some in Southern Shan State were slow to regain their retailer base. Markets were considered safe to visit, notwithstanding conflict-related factors.

**Food and NFI Supply – Overall supply of retail products was relatively good, particularly for foods.** Markets still carried a wide range of goods, and inventory levels were decent if not excellent. Supply of vegetables and essential foods were best among the product groups monitored, while supply of fuel and medicines were poorest. Taungoo had overall poor supply, while most other markets had at least moderately-good supply.

**Food supply was poorest in Shan State markets, while Sagaing lagged in fuel and Mandalay in other NFIs.** In Southern Sagaing supply was relatively good, but fuel supply was very poor. In Mandalay Region food supply was decent, but NFI supply was relatively poor. In Shan State food supply was poorer than elsewhere, while fuel supply was slightly better.

**Transportation Costs – Shipping costs were stable or rising in all markets monitored.** Retailers said the cost of shipping rice from suppliers ranged from 1000-6000 MMK/bag, and shipping costs were highest for retailers in Southern Shan State.



## Supply and Variety of Goods at Market

Supply was overall fairly good, and supply of foods was generally better than for NFIs (Chart 1). However, there was a gulf between the best-supplied markets like Aungban and the worst like Taungoo. Some village markets offered decent supply, even compared to towns. Many markets offered a range of goods within each product category, and the volume of supply was decent if not robust in most markets (Chart 2). The markets with the worst supply include Taungoo, Monywa, and Sagaing.

Chart 1. Supply of Foods and NFIs

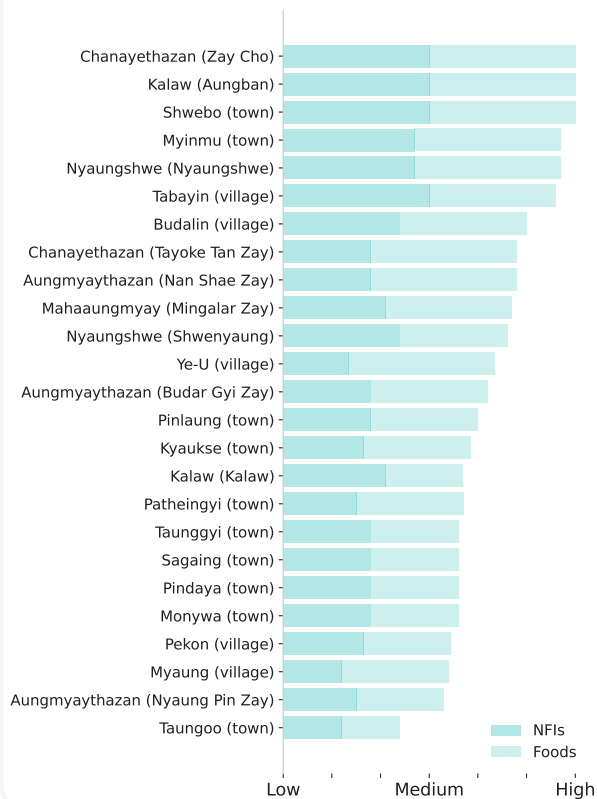
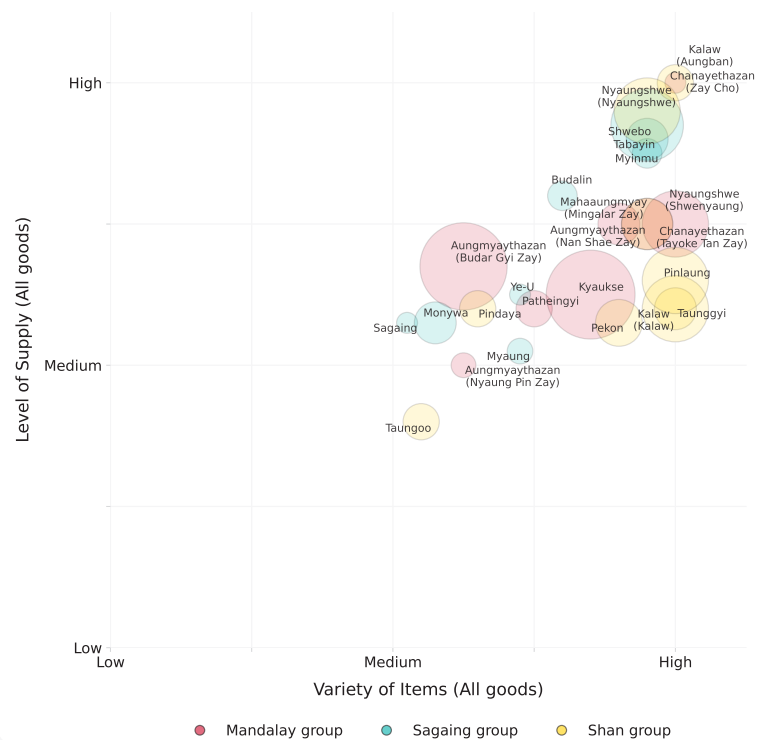


Chart 2. Level & Variety of Supply (All goods)

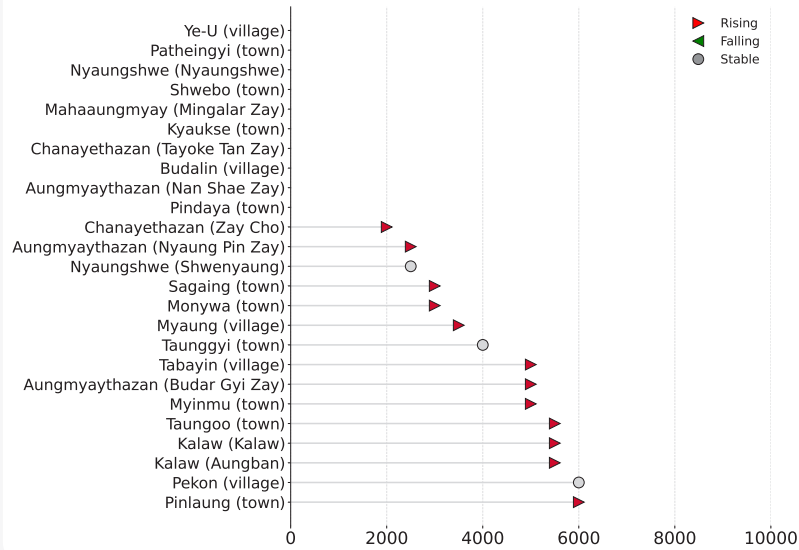
Market size indicated by bubble size



## Transportation Costs

Shipping costs were stable or rising in all townships monitored, although shipping costs varied considerably. The cost of shipping a 50kg bag of rice from a nearby supplier ranged from 1000-6000 MMK/bag, and it was highest in Southern Shan State.

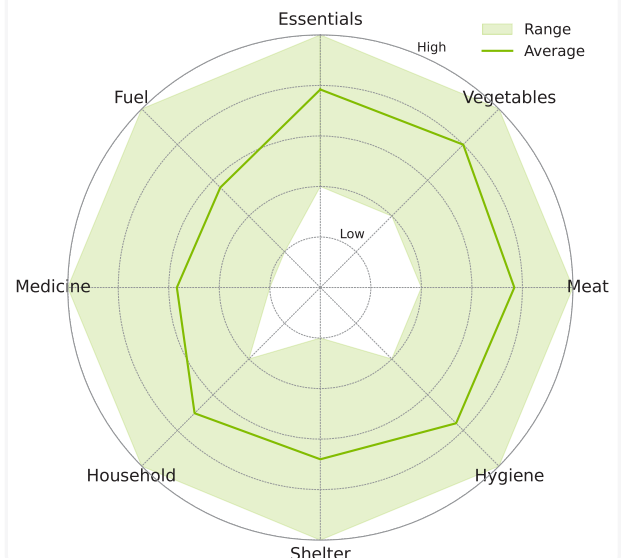
Chart 3. Transport Cost (50kg rice)



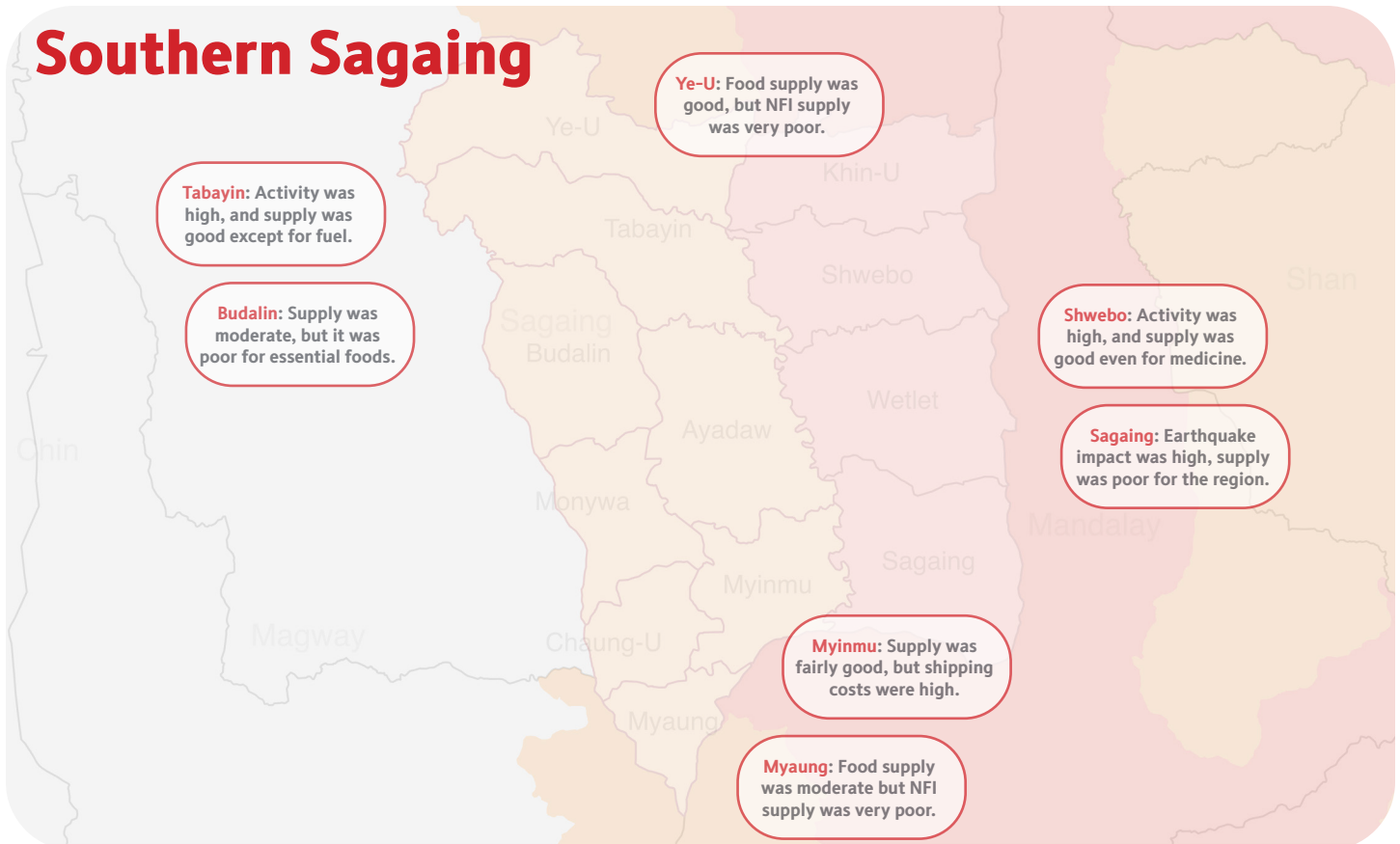
## Supply, by Product Category

Supply of fuel and medicine was poorest among product groups, while foods and hygiene NFIs were most robust. The worst-off markets had very poor supply of medicine, fuel, and shelter NFIs.

Chart 4. Supply, by Category (All Townships)



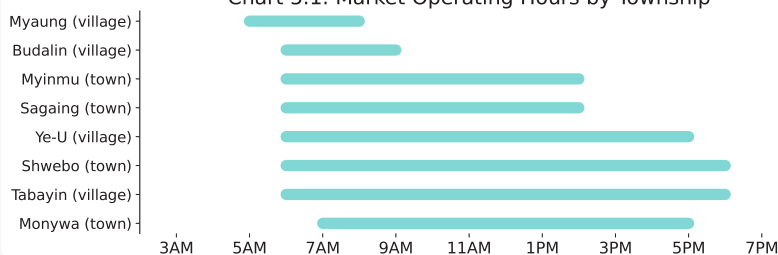
# Southern Sagaing



## Market Functionality

Sagaing town market suffered some infrastructure damage in the earthquake and has since experienced periodic closures. That said, most markets monitored in Southern Sagaing Region were open throughout the day (some village markets functioned only in the morning). Markets were generally safe to visit, although those in Myaung and Tabayin were somewhat unsafe due to conflict. Retailers were most concerned about rising fuel and transportation costs. Shipping costs for rice were 3000-5000 MMK/bag and rising.

Chart 5.1. Market Operating Hours by Township



## Supply, by Product Category

Supply was most robust for **meat/fish** and **vegetables**, while **fuel** supply was very poor. Notwithstanding fuel, supply—and particularly food—was on average better than other regions monitored.

Chart 5.3 Food & NFI Supply, by Region

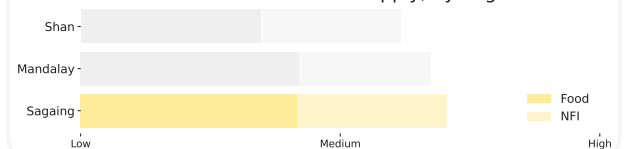
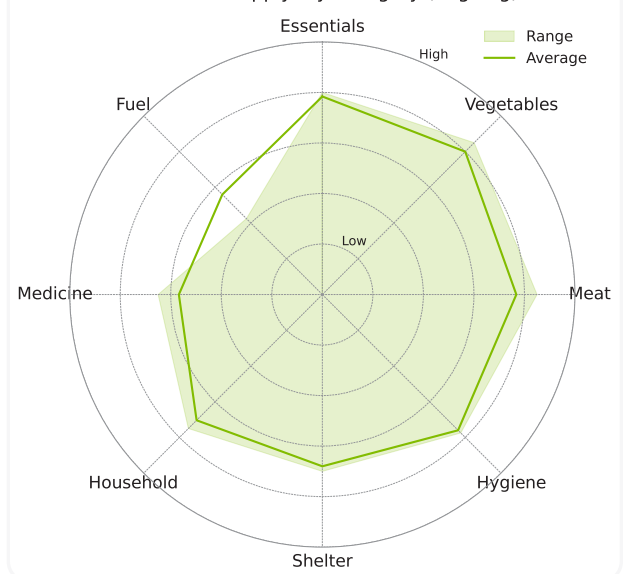
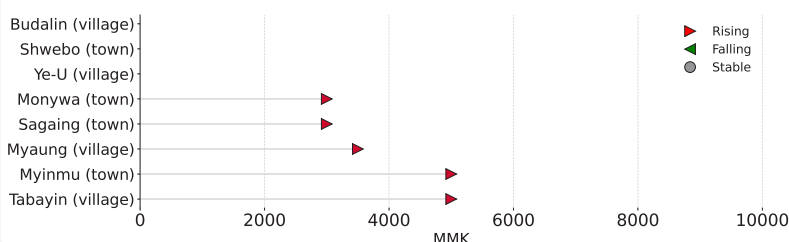


Chart 5.4. Supply, by Category (Sagaing)

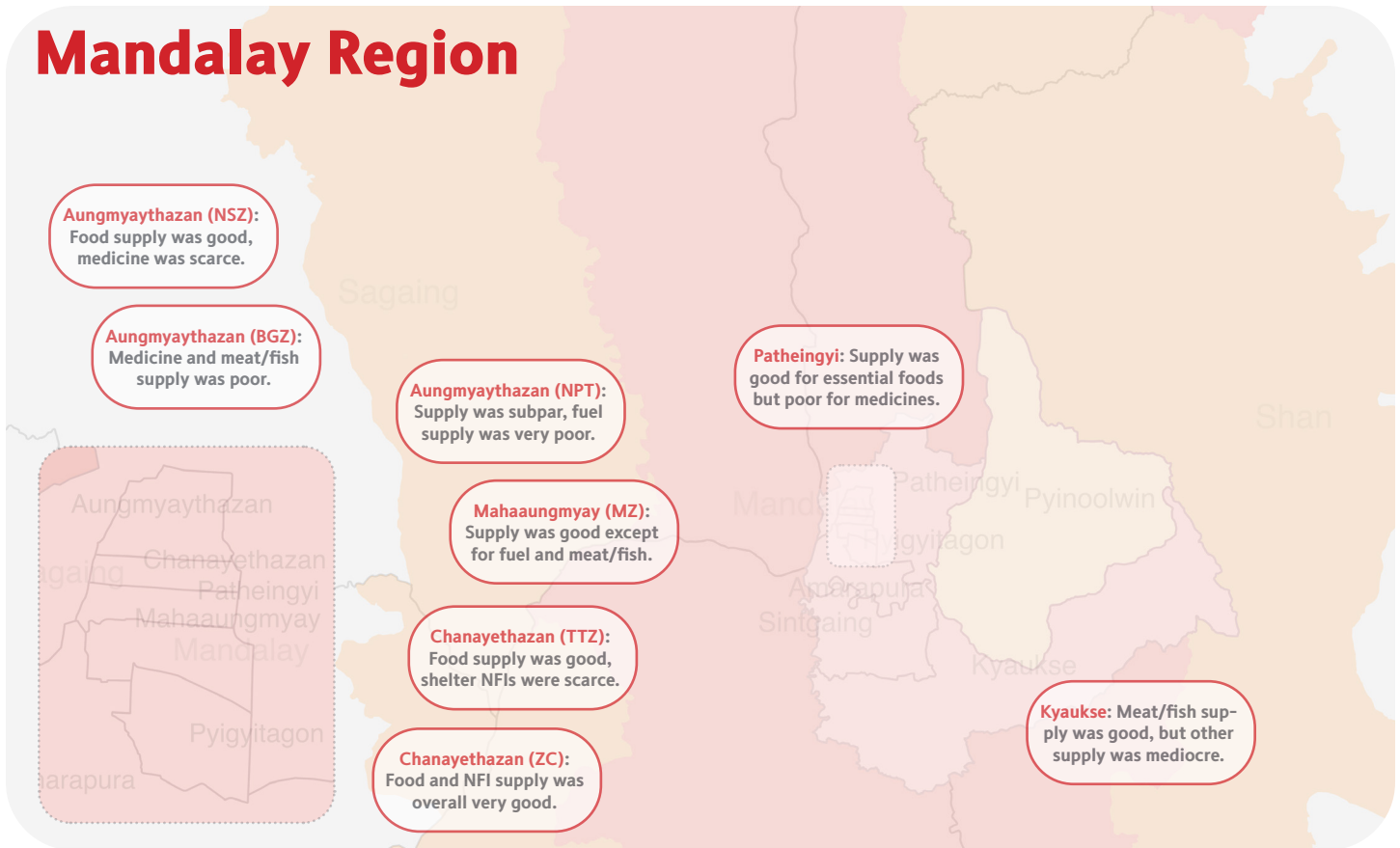


## Transportation Costs

Chart 5.2. Transport Cost (50kg rice)



# Mandalay Region



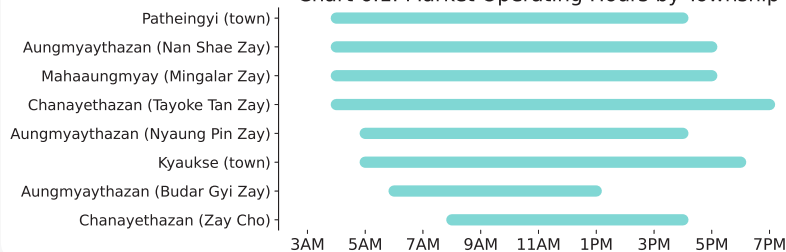
## Market Functionality

Zay Cho in Chanayethazan suffered damage in the earthquake and only exterior retailers remained (although supply remained good). Other markets monitored in the region were open and considered generally safe to visit. Markets stayed open throughout the day, although some closed briefly mid-day. Some retailers struggled to source fuel, medicine, and hygiene NFIs. Retailers interviewed said market infrastructure was intact while their home often were not. Shipping costs for rice were 2000-5000 MMK/bag and rising.

## Supply, by Product Category

Supply of foods and hygiene NFIs were relatively good, and better than in other regions. However NFI supply was much poorer, specifically **medicines** and **shelter** NFIs.

Chart 6.1. Market Operating Hours by Township



## Transportation Costs

Chart 6.2. Transport Cost (50kg rice)

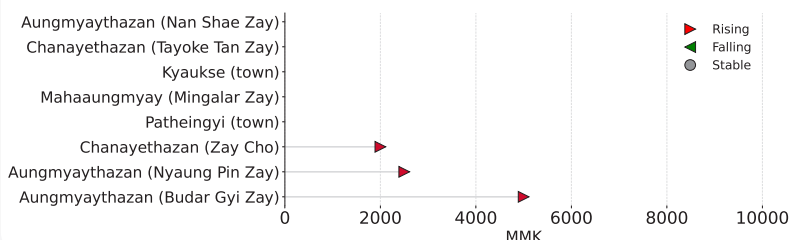


Chart 6.3 Food & NFI Supply, by Region

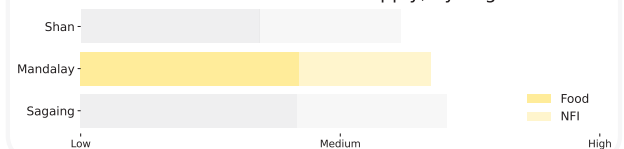
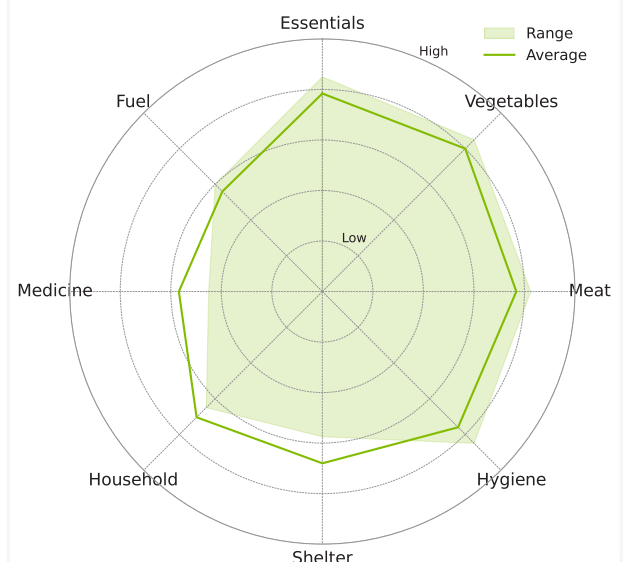
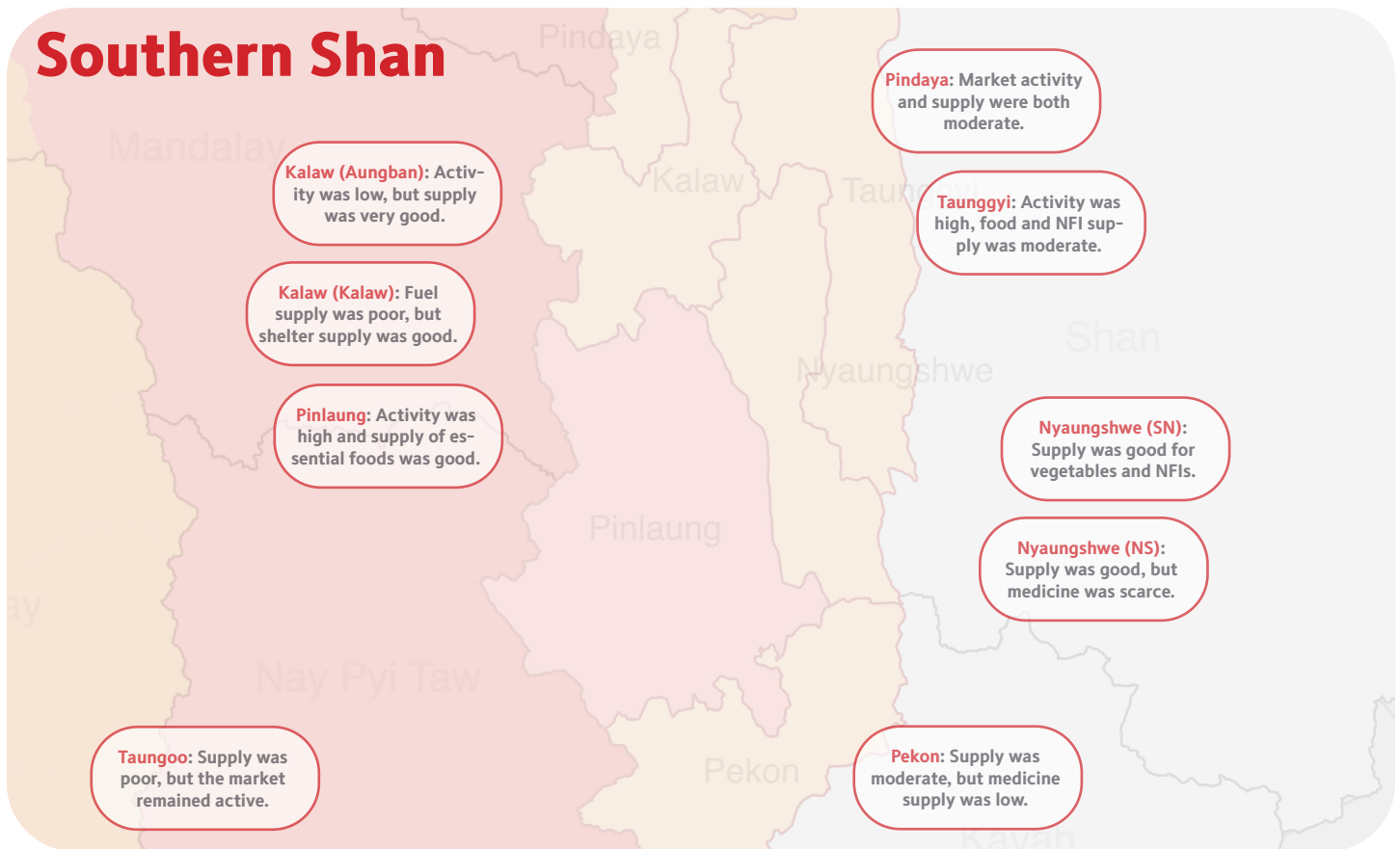


Chart 6.4. Supply, by Category (Mandalay)



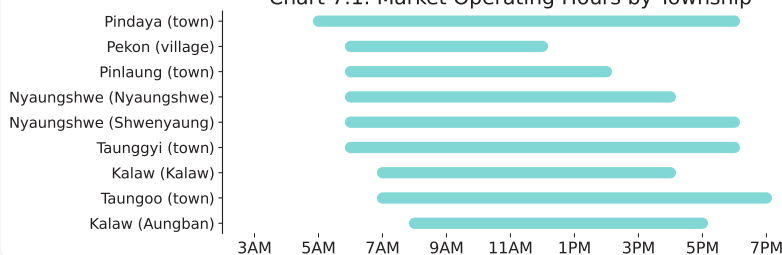
# Southern Shan



## Market Functionality

Markets monitored in Southern Shan State were open throughout the day, and there were no reports of major earthquake damage to market infrastructure. Retail activity in Pindaya and Pinlaung was depressed but returning day-by-day. Markets were generally safe to visit and free of major closures, although Pekon was an exception due to conflict. Medicines were difficult to source, and retailers said clean drinking water was scarce in Taungoo. Retailers were very worried about shipping costs, which were 5000-6000 MMK/bag of rice and rising.

Chart 7.1. Market Operating Hours by Township



## Supply, by Product Category

Food supply was poorer than other regions, and **meat/fish** supply was poorest. NFI supply was the same or better than other regions, and supply of **shelter** NFIs was most robust of all categories.

Chart 7.3 Food & NFI Supply, by Region

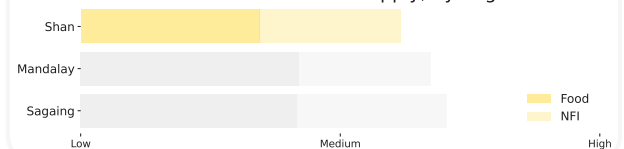
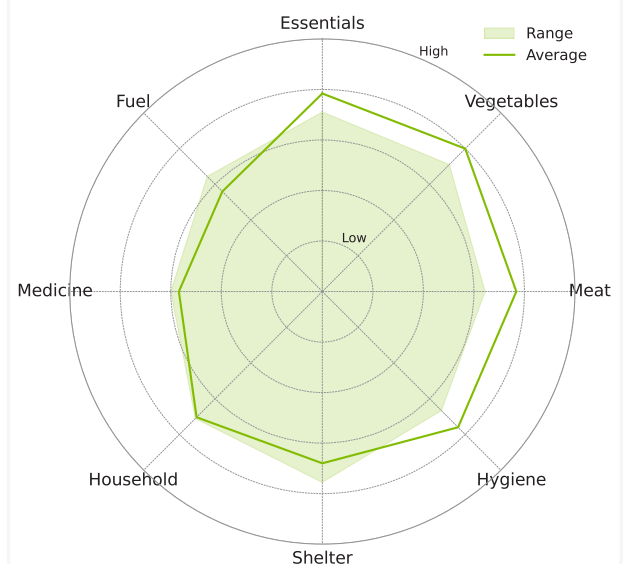
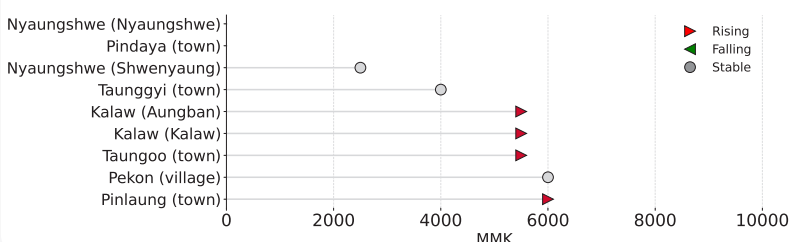


Chart 7.4. Supply, by Category (Shan)



## Transportation Costs

Chart 7.2. Transport Cost (50kg rice)





# Township Supply

The following charts depict the level of supply of eight product categories in each market monitored, including three categories of foods and five categories of NFIs. 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 A** - Markets with fairly-robust overall supply, although some were low in **fuel** or **medicines**. They were in/near Mandalay or high-trade areas of Southern Shan;
- Group B** - Markets lacking supply of various **NFIs**, but which otherwise had fairly-robust supply of foods. They largely consist of markets in the city of Mandalay;
- Group C** - Markets with below-average supply of **essential foods**, but which were well-supplied in some other categories of foods or NFIs;
- Group D** - Markets with moderate or poor overall supply. Some are well-stocked in a single product category, but overall supply was below-average.



## **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](mailto:market.analysis.unit@gmail.com)