MARKET ANALYSIS UNIT

# Sagaing Region IDPs

*In late-February / early-March the MAU conducted a third-round survey of displaced households in Sagaing Region to understand challenges they face. The study is based on a probability sample representing 2700 households currently or previously enrolled in cash assistance programs. MAU reports are available online at* ***www.themimu.info/market-analysis-unit****.*

## KEY FINDINGS

- **Ninety-five percent of households were still displaced in early-March**—up from 85% in December—and most still lived in temporary makeshift shelters;
- **Nearly half of households surveyed were redisplaced again since December**;
- **More households described security as "poor"** in March, rising from 38% in December to 53% in March;
- **Fewer households struggled to access shelter goods** in March, but access to other goods was unchanged;
- **The portion of households without work doubled since December**, with 54% saying access to work was "poor" and 39% saying no one in their home had work;
- **Fewer households bought food with cash transfers or work income**, while the use of credit remained high;
- **Some food insecurity indicators improved slightly**, but nutrition in households with small children and pregnant / breastfeeding women remained poor for many.

**The number of internally displaced persons in Sagaing Region continued to grow in early-2023.** According to data from the Armed Conflict Location & Event Project (ACLED), the monthly count of conflict-related events in Sagaing Region jumped between December 2022 and March 2023, following several months of lower counts (see **Figure 1**).[1] The United Nations estimated that the total number of IDPs in Sagaing Region grew by 15% during this period, increasing from 616,500 at the start of December to 707,200 at the start of March, with a particularly sharp increase in January.[1] As of early-March, basic safety and access to shelter remained major concerns for many IDPs, many of whom also continued to struggle with limited freedom of movement and poor access to work. As armed conflict continues to disrupt critical market systems, more data is needed on the ability of IDPs to meet these and other basic needs.

**In early-March the MAU surveyed current and former IDP households from eight Sagaing Region townships about their living conditions and market access.** The survey of roughly 400 households represents a population of more than 2700 currently- or previously-displaced households enrolled in one or more cash assistance programs. The study focussed on displacement status, household living conditions, financial resources, access to markets and goods and food security. The study is not intended to represent all IDPs in Sagaing Region, nor is it intended as an evaluation of the effectiveness of cash programs. This report is based on a third-round survey of the same population contacted in September and December 2022.

**MAP 1. Distribution of study population, by Township**
The study includes IDPs displaced from eight Sagaing townships.

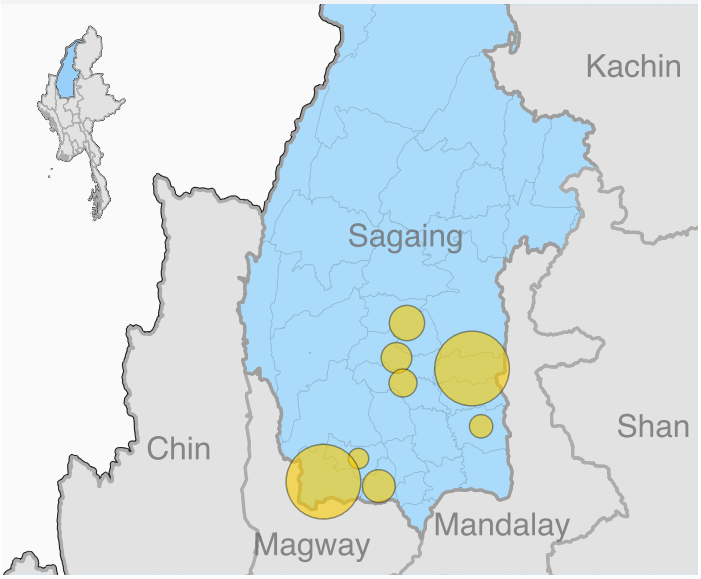
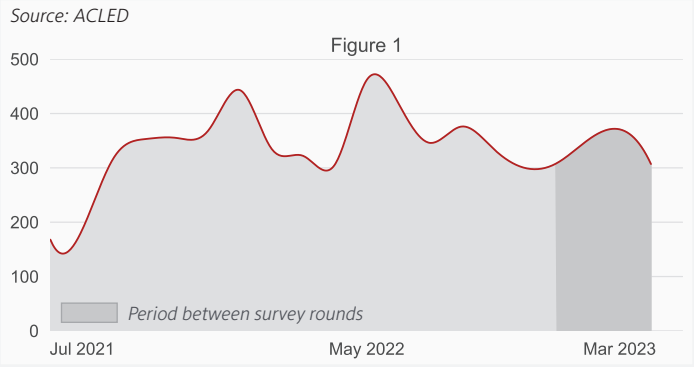



**FIGURE 1. Conflict Events in Sagaing Region, by Month**
Monthly conflict events jumped between December and March.

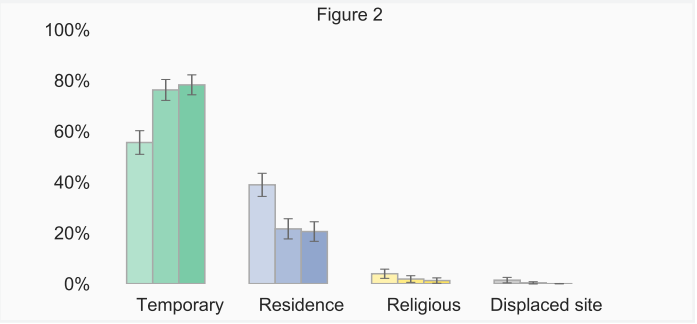



[1] ACLED. April 2023. Armed Conflict Location and Event Data Project. www.acleddata.com.
[2] UN in Myanmar. April 2023. Myanmar Emergency Overview Map.

## LOCATION AND SHELTER

**The rate of redisplacement doubled in early-2023, and most IDPs still lived in temporary shelters.** As of early-March, 95% of households in the study remained displaced (up from 85% in December) and just 4% had returned to their original homes (down from 14%).[3] Moreover, nearly half of all households (45%) were re-displaced between December 2022 and March 2023—twice as many as in the previous three-month period.[4] Anecdotally, respondents attributed redisplacement to an uptick in local military activity (see above). As a result of redisplacement, half of all households surveyed were displaced as recently as October 2022. The nature of these movements continued to be very local, with more than 90% of households remaining in their township of origin (those who left their township often left their state as well). As was the case in December, four-in-five households were living in temporary shelters in March, with most others living in host homes (see **Figure 2**). Although many IDP households moved during this period, not all of these movements were of the same nature. While some households were redisplaced from homes to temporary shelters, others who were not redisplaced nonetheless moved into host homes (possibly due in part to the conclusion of the winter crop season, which may have driven some households to leave host homes in search of garden space).

**FIGURE 2. Type of Shelter**
The majority of IDPs still lived in temporary shelters in March.

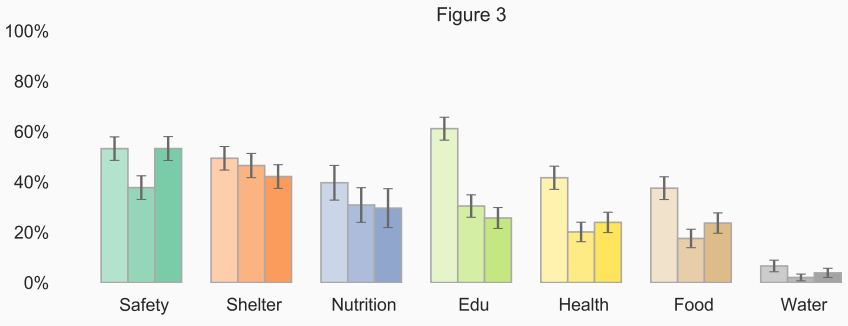


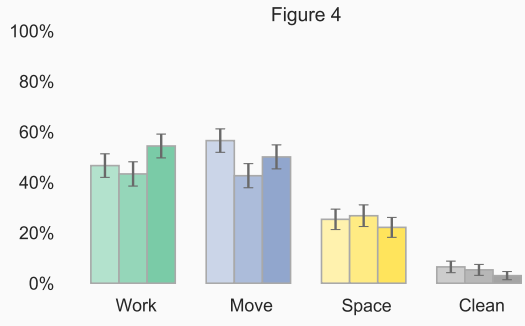

## LIVING CONDITIONS

**Basic safety and access to food worsened in recent months, while many other conditions were unchanged.** Security was particularly worisome for many IDP households. Fifty-three percent of households described their safety/security as "poor" in early-March, up sharply from 38% in December. The portion of households describing their access to food as "poor" also increased slightly from 18% to 24% (see **Figure 3**). There was no measureable change in other conditions, such as access to shelter, education, healthcare or access to water. As before, conditions were rarely described as "good."

**The portion of households without any members employed doubled from December to March, and more**

**FIGURES 3 & 4. Portion of Households Describing Various Living Conditions as "Poor"**
Accsss to education, health, food and safety improved for some since August, but there was little change in shelter, mobility and work.




**BOX 1. Living Conditions Measures Used in the Survey**

This study asked respondents about conditions related to seven strategic response priorities in the 2022 Humanitarian Response Plan (HRP). The HRP represents the coordinated plan for humanitarian agencies to meet the acute needs of people affected by recent crises in Myanmar. The HRP was used a guide only, and data do not reflect progress toward related objectives. The HRP-based measures in this study include:

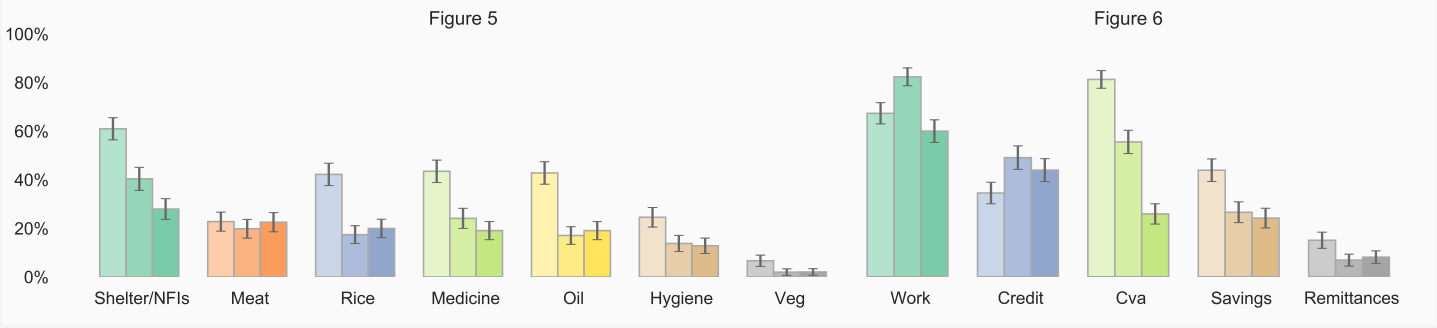
**Education** - Access to education/materials;
**Food** - Access to food;
**Health** - Access to physical/mental health care;
**Safety** - Conditions for basic safety/security;
**Nutrition** - Nutritional status of children under age five and pregnant/ breastfeeding women;
**Shelter** - Access to basic shelter/materials;
**Water** - Access to water for cleaning/hygiene.

This study also asked about several other ancellary or crosscutting conditions:

**Movement** - Freedom of movement;
**Work** - Access to livelihood/work opportunities;
**Space** - Sufficient space (absance of overcrowding);
**Cleanliness** - Access to a clean/sanitary environment.

[3] Estimates in this report assume 95% confidence intervals and a 5% margin of error (with the exception of nutrition and remittances).
[4] Market Analysis Unit. December 2022. Survey of IDPs in Sagaing Region.

**FIGURES 5 & 6. Access to Products & Sources of Funds for Acquiring Food**
Access improved for shelter materials but not for other goods. Far fewer households used work income or cash assistance to buy food.




**households describe access to work as "poor."** The portion of households with no members employed in the past 30 days doubled from 18% in December to 39% in March. Additionally, the portion of households describing access to work as "poor" also increased from 43% to 54% (see **Figure 4**). This may be tied more to the end of the paddy harvest and winter crop season and less to limitations on movement, which did not change measurably. Despite worsening security conditions, households reported no measureable change in freedom of movement. There was a small shift in the nature of employment, with the portion of working-households engaged in farming falling from 80% to 70% and the portion engaged in trade growing modestly from 4% to 8% (services and construction were unchanged).

## ACCESS TO MARKETS AND GOODS

**Nearly half of IDP households remained unable to travel to a market, and the role of mobile traders grew even more important.** As was the case in December, slightly less than half of all households were unable to travel to a food market as of early-March; poor security and transportation remained the primary reasons for this. Fifty-three percent of households said there was a food market within a thirty minute walk from their residence (up from 39%), although it is unclear whether this change was due to market activity or household movements. Among households unable to travel to a market, the portion relying primarily on traders to access goods increased sharply from 58% in December to 89% in March, and far fewer relied on friends or neighbors to travel for them; because there were few reports of worsening mobility during this period, the increased use of traders may be due to an increase in trader activity following the new paddy in late-2022 and winter vegetable harvests in early-2023.

**BOX 4. Preferred Aid Modality**
Households still prefer cash, but many welcome in-kind aid.

**Households continued to prefer cash to in-kind assistance as an aid modality, although many still had little preference between the two.** Fifty-five percent of households prefered receiving cash assistance over in-kind support, while 38% held no preference for one over the other. Elevent percent prefered in-kind assistance to cash.

**BOX 2. Children and Pregnant/Breastfeeding Women**
Nutrition for pregnant women and children was unchanged.

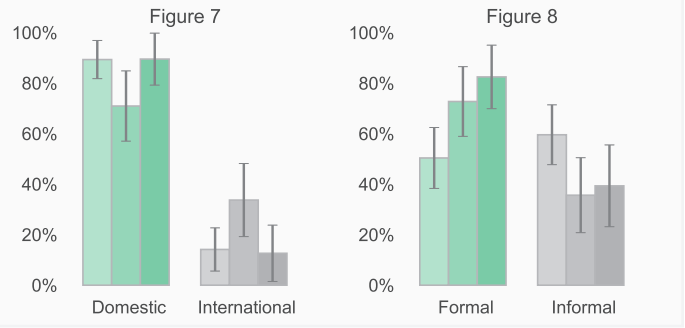
**Nutrition improved in March, but not for households with children under five and/or pregnant or breastfeeding women.** Among households without children or pregnant/breastfeeding women, the portion describing nutrition as "poor" fell from 26% to 13%. However, one-third of households with children and/or pregnant or breastfeeding women still described nutrition as “poor", as was the case in December (see **Figure 3**).

**Access to shelter materials improved by March, but there was little change in access to other goods.** The portion of households who said access to shelter materials was "poor" declined from 40% in December to 28% in March (see **Figure 5**). There was no measureable change in access to most other goods, with one-in-five households still struggling to access rice, cooking oil, meat and medicines. Only access to vegetables worsened slightly, as the portion of households reporting "good" access to vegetables declined from 22% in December to 10% in March (possibly due to the winnowing of winter supply in early-March).

## SOURCES OF FUNDS FOR FOOD

**Far fewer IDP households used cash assistance or work income to buy food in recent months, and many continued to use credit.** Work income remained the most common source of funds for food in early-March, even though the portion of IDP households spending work income fell sharply. Sixty percent of IDP households bought food with work income in March, down from 82% in December (see **Figure 6**). The use of cash assistance fell even more dramatically, declining from 56% in December to 26% in March. Just one-third of households reported recieving cash assistance between December

**FIGURES 7 & 8. Sources and Channels of Remittances**
Most remittances were formal and sourced domestically.



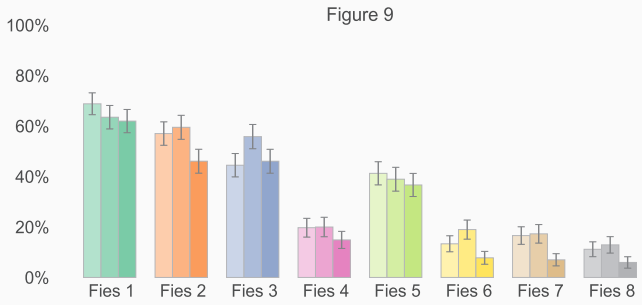

and March, and households in general appeared to cease spending cash assistance within two months of recieving it. There was no measureable change in the portion of households buying food with credit (44%), savings (24%) or remittances (8%). Credit use, while widespread, was more common among recently-displaced households.

**There was no measureable change in the nature of remittances among IDP households in recent months.** Domestically-sourced remittances remained far more common than internationaly-sourced remittances, and formal channels remained more common than informal changes (see **Figure 7** and **Figure 8**). Although there was no measureable change in the past three months, the portion of households using formal channels to receive remittances appeared to have risen the past six months, increasing from roughly half of recipients in September 2022 to four-in-five recipients in March 2023. There was no clear relationship between the use of remittances and other circumstances, such as recent-displacement.

## FOOD INSECURITY & COPING

**Food insecurity indicators improved moderatly between December and March.** The average Reduced Coping Strategies Index (rCSI) score—which focuses on behaviors in the past seven days—again remained unchanged with a median score of seven. That said, five of eight Food Insecurity Experience Scale (FIES) indicators were less prevalent among IDP households in March 2023 than in December 2022; this was particularly true of the most-severe indicators. Fewer than one-in-ten IDP households reported running out of food, household members going hungry, or household members going at least one day without food during the past month(see **Figure 10**). On the other hand, several of the less-severe food insecurity indicators remained persistently high, with nearly half of IDP households continuing to worry about having enough to eat, lacking healthy and nutritious food, and lacking a varied diet. Moreover, one-in-three households continued say at least one member of their household "ate less than they thought they should" due to lack of money or other resoruces. This modest change in food insecurity measures appeared to agree with the lack of change in mobility and access to food (see **Living Conditions** and **Access to Markets and Goods**).

**FIGURE 9. FIES Food Insecurity Indicators (Past 30 days)**
Food insecurity measures improved slightly in recent months.




**BOX 3. Description of FIES Indicators**
The MAU regularly collects data on eight Food Insecurity Experience Scale (FIES) indicators, which measure the following behaviors:

**In the past thirty days, there was a time when someone in the household...**

- **FIES 1** - Worried about not having enough food to eat because of a lack of money or other resources.
- **FIES 2** - Was unable to eat healthy and nutritious food because of a lack of money or other resources.
- **FIES 3** - Ate only a few kinds of foods because of a lack of money or other resources.
- **FIES 4** - Had to skip a meal because there was not enough money or other resources to get food.
- **FIES 5** - Ate less than they thought they should because of a lack of money or other resources.
- **FIES 6** - Ran out of food because of a lack of money or other resources.
- **FIES 7** - Was hungry but did not eat because there was not enough money or other resources for food.
- **FIES 8** - Went without eating for a whole day because of a lack of money or other resources.

## IMPLICATIONS

- **Greater attention to food insecurity will likely be needed in the months ahead.** Food insecurity indicators have improved somewhat throughout the winter season, yet the approaching monsoon season is likely to present new challenges. Food assistance above and beyond current levels will be needed to avoid dramatically-worse conditions;
- **A worsening security environment risks unraveling some recent improvements in living conditions.** Further deterioration in the security situation will likely prove challening even for long-displaced households that may have established consistant sources of shelter, food and other essentials;
- **Market interventions may be needed to further improve access to goods.** Although access to goods improved somewhat in late-2022, slower recent improvement suggests further market interventions may be needed;
- **Sustained support of IDP households may be a relatively easy way to reach large numbers of people in need.** The use of cash assistance to buy food has dropped significantly over time, yet financial hardship remains severe. Many IDP households would likely benefit greatly from sustained support;
- **Targeted nutrional support may be needed.** Nutrion improved for some households, but far less so for households with children under five or pregnant / breastfeeding women. Designing interventions to support the nutritional needs of these households may be particularly impactful.

## Market Analysis Unit (MAU)

The Market Analysis Unit provides development practitioners, policymakers and private sector actors in Myanmar with data and analysis to better understand the impacts of Covid-19, 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 service).

**CONTACT**

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

MARKET ANALYSIS UNIT