

Quarterly Markets Overview - Spotlight on Affordability, Accessibility and Availability

April 2026 | Afghanistan

Context & Rationale

Afghanistan continues to face compounded pressures driven by long-standing structural internal challenges, now intensified by the recent escalation of regional conflict and its spillover effects. A sharp reduction in foreign aid, rising regional tensions, and repeated natural disasters (the country is prone to earthquakes, flooding, drought, landslides, and avalanches) have compounded existing vulnerabilities. At the same time, large-scale population movements have added further strain, with nearly 2.61 million Afghans returning from Iran and Pakistan since 2025.¹

These developments have placed additional pressure on already limited services, livelihood opportunities, and local systems, particularly in areas hosting high numbers of returnees. While the full impact is still unfolding, early signs point to increasing strain on household's ability to meet basic needs across both urban and rural areas.

This report is part of a quarterly series that alternates focus between (1) affordability and access to essential goods, and (2) market functionality and supply resilience. This overview focuses on the affordability, accessibility, and availability of key commodities, with particular emphasis on the cost of the Minimum Expenditure Basket (MEB). Drawing on JMMI, Whole of Afghanistan Assessment (WoAA), and Humanitarian Situation Monitoring (HSM) data, and triangulated with secondary sources, the brief assesses household's ability to access markets and meet basic needs across population groups.

Methodology Overview

Primary data comes from the Joint Market Monitoring Initiative (JMMI), an assessment conducted by REACH through the Cash Working Group (CWG) and its partners. The JMMI is a monthly assessment in which vendor key informants (KIs) are purposively selected from markets across Afghanistan.

The KIs are interviewed using a structured questionnaire which asks about the availability and prices of essential goods in the KI's location, as well as providing insights into market functionality. The brief includes JMMI data from March 2025 through March 2026 but occasionally draws on previous years for seasonal comparisons. The most recent dataset can be accessed [here](#), and the corresponding dashboard can be found [here](#); for more information on the methodology, please see the Terms of Reference [here](#).

Note that due to the key informant methodology and reliance on purposive sampling, the JMMI data does not accurately portray conditions in all markets. Instead, it provides an indication of conditions in assessed markets. In addition to the JMMI, this brief includes data from various secondary sources. These fill information gaps and aid in contextualizing the data. The full list of sources used can be found in the endnotes.

Key Messages

- The cost of the MEB remains significantly above average household income, with the largest affordability gaps observed among crossborder returnees and internally displaced population. Recent increases in cross-border returnees further heighten concern, as newly arrived households face limited income opportunities and add pressure to already saturated labour markets.
- Current affordability pressures are unlikely to ease in the short term. While seasonal improvements may provide temporary relief, underlying economic constraints including weak labour markets, reduced income opportunities, and ongoing regional instability are expected to sustain pressure on household purchasing power and market prices.
- Although markets remain physically accessible, high transportation costs, difficult terrain, and seasonal disruptions continue to limit effective access, particularly in remote and hard-to-reach areas, reinforcing disparities across population groups and locations.
- While staple food items are consistently available in most markets, selected hygiene products show more limited availability, reflecting gender asymmetries in supply and demand dynamics across essential goods.

Seasonal And Conflict-Driven Pressures On Rising MEB Costs

MEB Cost Trends Respond To Additional Pressure

The cost of the Minimum Expenditure Basket (MEB) remained relatively stable between June and October 2025, with only minor fluctuations observed. This period of stability was followed by a noticeable increase in November and December, after which costs stabilized temporarily. A further uptick, slightly higher than during the same period in the previous year, was observed between February and March 2026 (Figure 1). Most of these variations align with seasonal dynamics of winter; when constraints affect supply chains, transportation costs rise, and access to markets becomes more difficult.

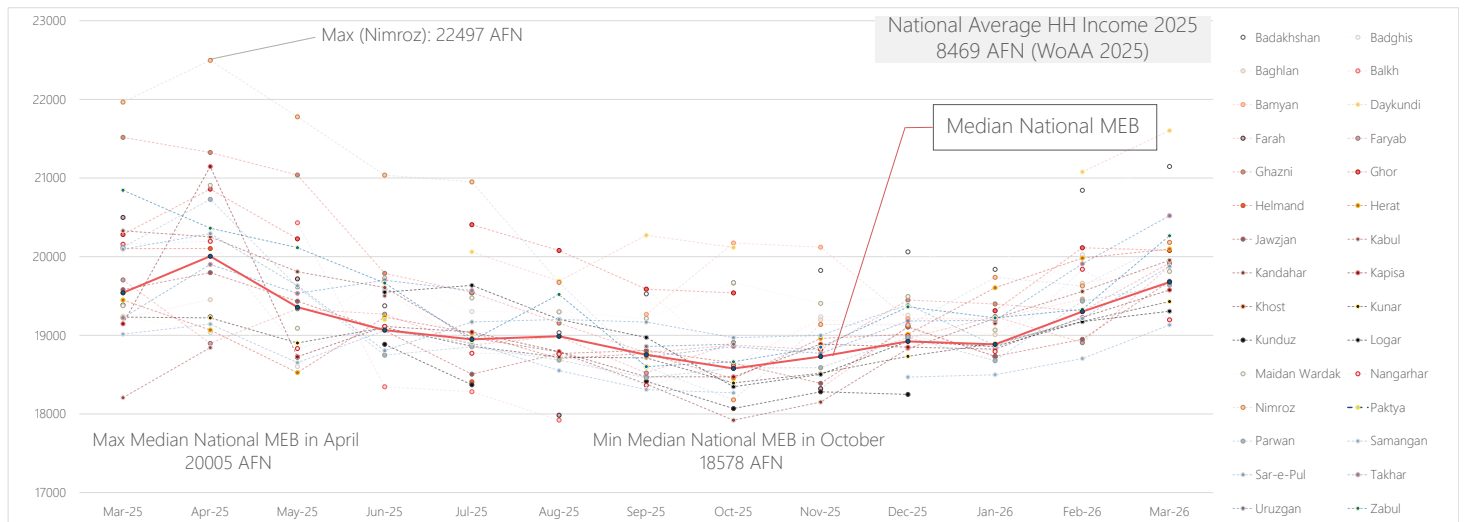
Nonetheless, the peak from February to March in 2026 is more likely driven by a combination of additional pressures beyond seasonality. Tensions along the Afghanistan–Pakistan border disrupted key trade

corridors, particularly affecting border markets and the flow of imported goods. While some trade flows adapted through alternative routes via Iran and Central Asia, these adjustments occurred at reduced volumes and higher costs.²

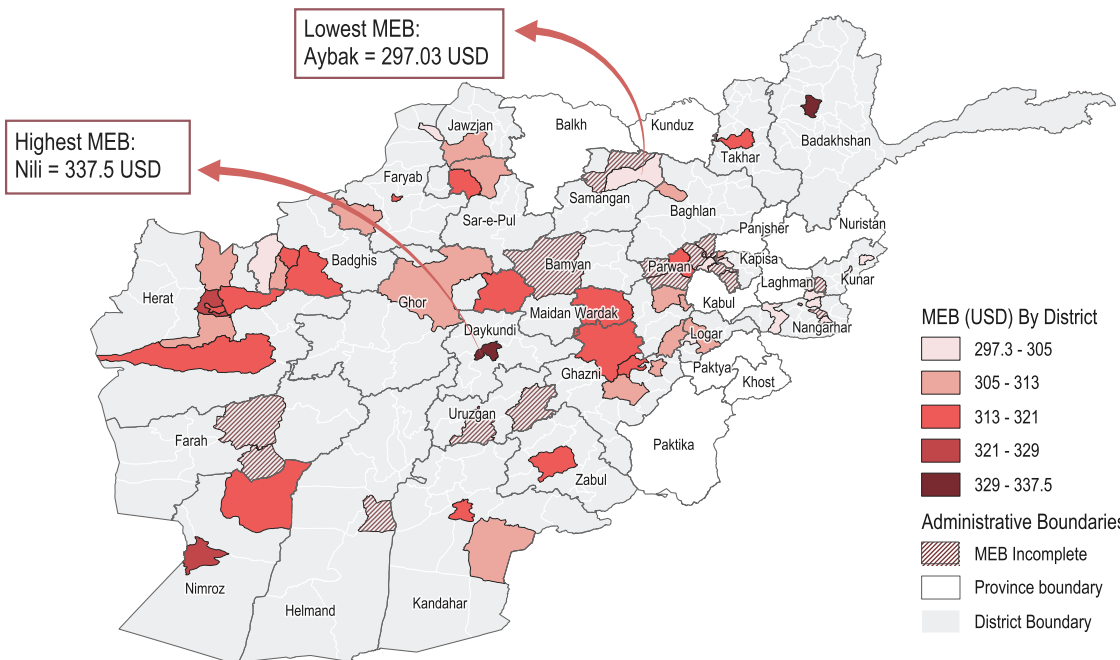
At the same time, the rising conflict-led regional instability in the Middle East contributed to spiking fuel prices, increased transportation costs, and disruptions to secondary supply routes, further straining market systems.³ Additional pressure stemmed from increased demand linked to population movements, particularly the return of Afghans from Iran and Pakistan, which placed added stress on already fragile markets in border areas.⁴

At the province level, the highest MEB costs were consistently observed in districts in Daykundi, Nimroz, Herat, and Badakhshan (Map 1). Except for Nimroz and Badakhshan, which face border closure problems, the geographic remoteness of the provinces, limited infrastructure, and weak market integration, increase transportation costs and restrict the regular flow of goods.

Figure 1: Median MEB in AFN By Province, March 2025 - March 2026. Dotted lines represent province MEBs.



Map 1: MEB Cost by District, March 2026.



Food Item Costs Stabilized Seasonally but Remained Elevated Amid Trade Disruptions

In the last year at national level, the cost of food items followed a seasonal pattern. Prices declined and slightly fluctuated during mid-2025, reflecting seasonal improvements in the availability of staple commodities such as wheat and vegetable oil. However, this behaviour was temporary, with prices increasing again towards the end of the year, in line with seasonal pressures and earlier warnings of below-average agricultural conditions and growing strain on food systems.⁵

Looking ahead, seasonal improvements in domestic production may contribute to localized and temporary price easing, particularly in areas with better market access. However, these gains are likely to remain limited and uneven. Ongoing regional instability, including disruptions linked to the Strait of Hormuz crisis, continues to drive up fuel, transportation, and import costs, constraining broader price reductions. In addition, dry conditions and below-average agricultural performance may further limit seasonal relief, increasing reliance on markets while purchasing power remains weak.⁶

WASH Costs Vary Across Provinces Amid Inflation and Seasonal Pressures

WASH item costs continued to show varied trends across provinces, consistent with patterns observed in the previous analysis period (June 2024–June 2025).⁷ Throughout 2025–2026, these trends have been influenced by a combination of factors, including a rebound in inflation following the deflationary period in early 2024, multiple border closures, including the current one with Pakistan, and ongoing drought conditions.

Seasonal dynamics further shape these cost variations, particularly during winter, when transportation constraints increase logistics costs and limit access to safe water in some areas. Rising non-food inflation, largely driven by higher transportation due to fuel price increases, has also contributed to upward pressure.

Regionally, some provinces have been more sensitive to price volatility. Daykundi was the province with the highest costs for WASH basket items while Nimroz and Logar showed the biggest fluctuations throughout the year (Figure 3).

Figure 2. Median Food Items Cost in AFN by Province, March 2025-March 2026. Dotted lines represent province food items.

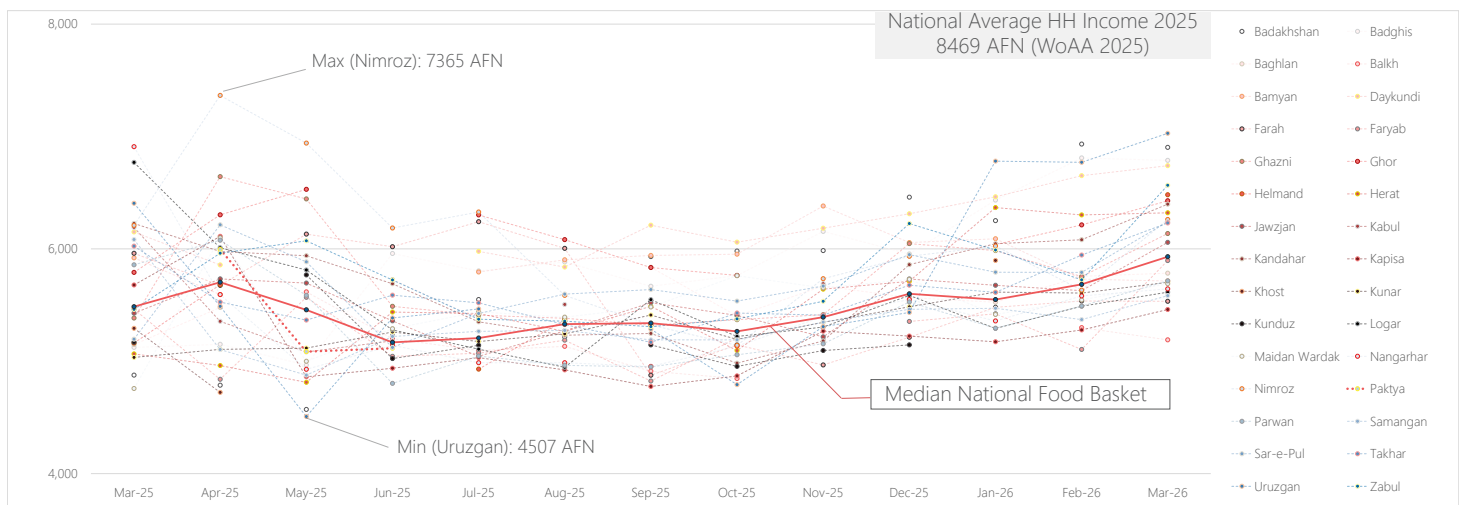
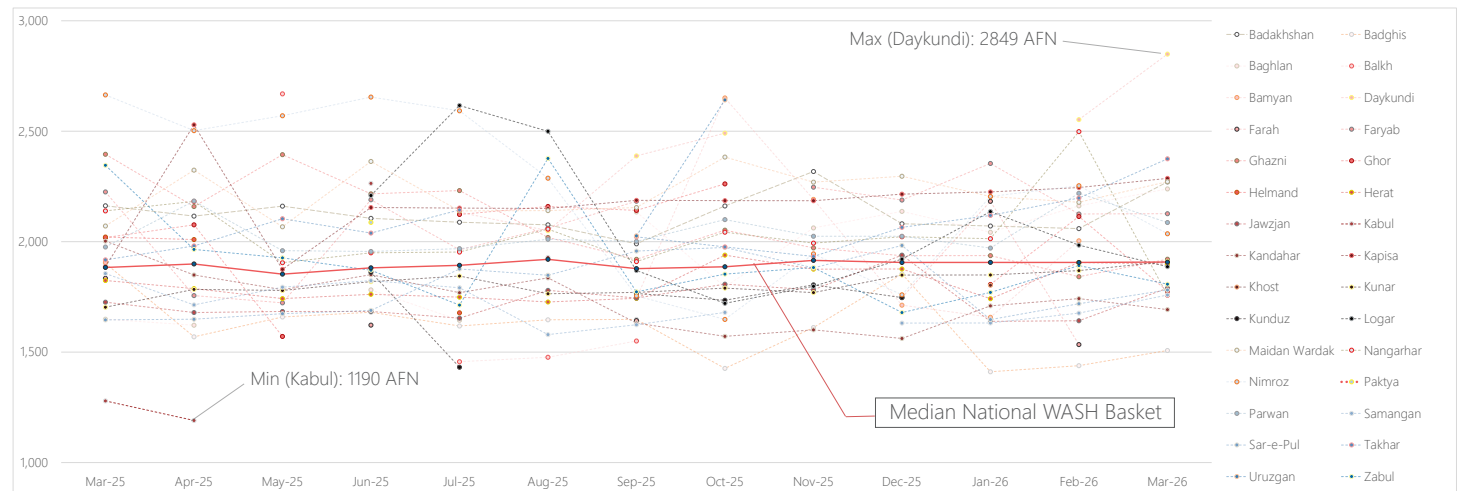


Figure 3. Median WASH Items Cost in AFN by Province, March 2025-March 2026. Dotted lines represent province WASH items.



Widening Affordability Gaps Amid Declining Incomes and Rising Living Costs

Aside from reduced availability of products linked to harvest cycles and temporary trade disruptions, affordability constraints continued to play a bigger role in the ability that households have to access essential goods and services. The national cost of the Minimum Expenditure Basket (MEB) remained consistently beyond the reach of most households, with average income covering less than half of basic needs.⁸

At the same time, a contraction in average household income (or at least in real per-capita income) in Afghanistan has taken place between 2024 and 2026, even though the overall economy showed modest growth.⁹ Reports from the World Bank and the International Labour Organization highlight persistently low job creation, a shift toward low productivity and informal employment, and declining real wages, all of which have constrained earning capacity.¹⁰

Income Gaps Are More Pronounced Among Cross-Border Returnees and Recently Displaced Populations

Structural barriers continued to shape affordability and access to services. Cross-border returnees, both recent and protracted, face some of the largest gaps between average income and expenditure, with the cost of the MEB exceeding more than three times their average income. Similarly, female-headed households report average income levels that are significantly lower than the cost of basic needs, with the cost of the MEB also representing close to three times their earnings.

These disparities reflect limited access to stable livelihoods. Returnees face constrained reintegration in saturated labour markets, while female-headed households encounter barriers to formal employment and rely more on informal income.

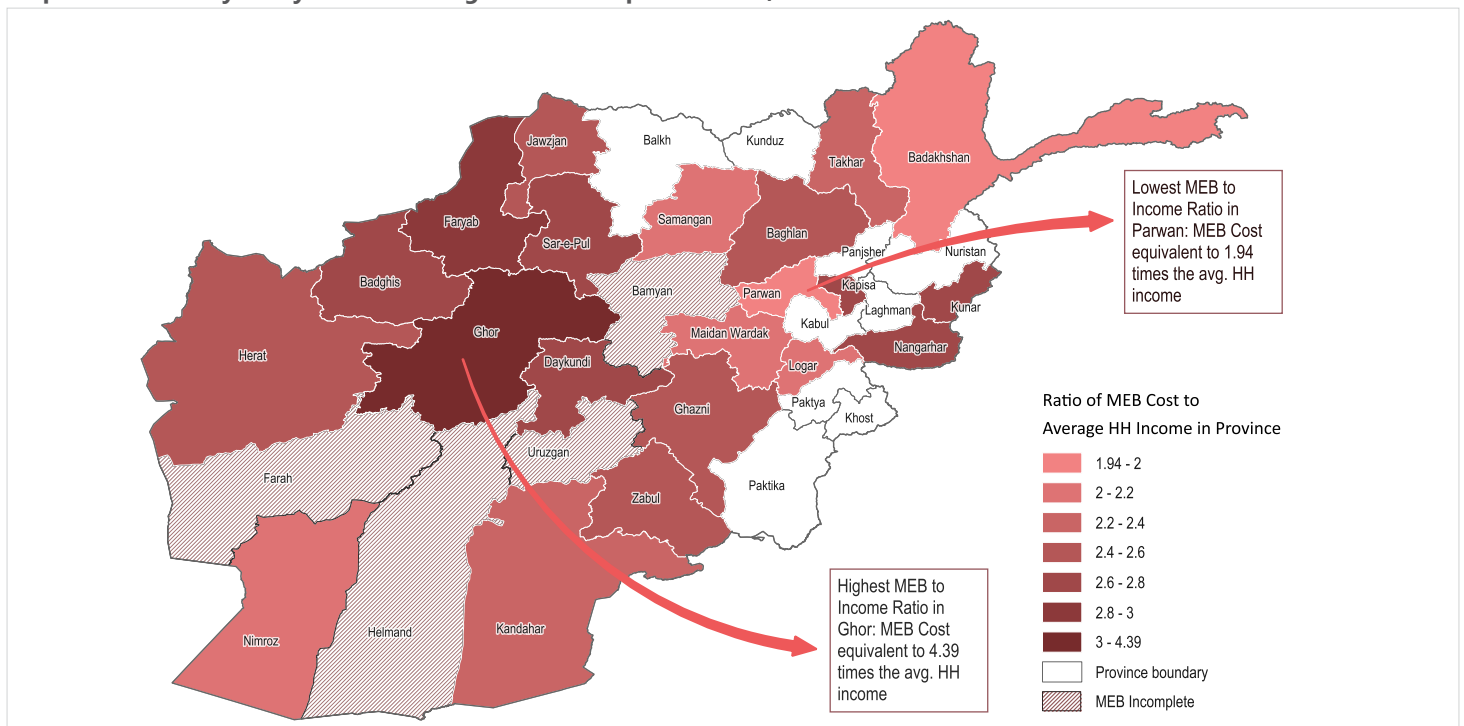
Terrain and Remoteness Widen Affordability Gaps

Affordability challenges are high across the country with some provinces, such as Ghor, reflecting the biggest gap (see Map 2). Similar to Ghor, provinces such as Faryab and Daykundi have a combined effect of drought, weak economic conditions, and limited income-generating opportunities that have led to particularly high gaps between average income and MEB. Households in this provinces rely heavily on loans, income from own agriculture and casual work but during the lean season, rely almost entirely on markets to access food, while facing eroded purchasing power and insufficient income, preventing many from meeting their minimum needs.¹¹

Persistent Gap Between Household Income and Essential Expenditure

Findings from the WoAA indicate that for most population groups, average household income is largely absorbed by key expenses, primarily food and rent, resulting in negative net income after covering basic needs. While food costs fluctuate seasonally, they continue to represent a substantial share of total expenditure, limiting household's ability to meet other essential needs. At the same time, increases in non-food costs, particularly transportation and housing, have further widened the gap between income and expenditure. Only male and female-headed households report slightly positive net income on average, with male-headed households maintaining comparatively higher margins, though these remain limited in the context of overall cost pressures.

Map 2: Affordability Analysis: MEB to Avg. HH Income per Province, March 2026.



Infrastructural and Financial Challenges Preventing Access to Markets

Limited Transportation and Distance to Markets as Main Challenges

Physical accessibility constraints continue to limit access to markets. In many parts of the country, a significant share of communities are located at considerable distance from markets, with travel times often exceeding 30 minutes. Provinces such as Farah, Bamyan, Zabul, Panjsher, and Nuristan (see Map 3) illustrate these challenges, where remoteness and dispersed settlements reduce the frequency with which households can access markets.

JMMI findings throughout the year highlighted limited transportation as a main challenge. Furthermore, according to results from HSM in March 2026, following financial constraints (96%) as a main problem to access markets, the distance to the market place (27%) and unsafe conditions along the route (18%) were the main barriers experienced across the country.

Figure 4: Percentage of communities according to ability to buy/sell items in the last 30 days (HSM March 2026)

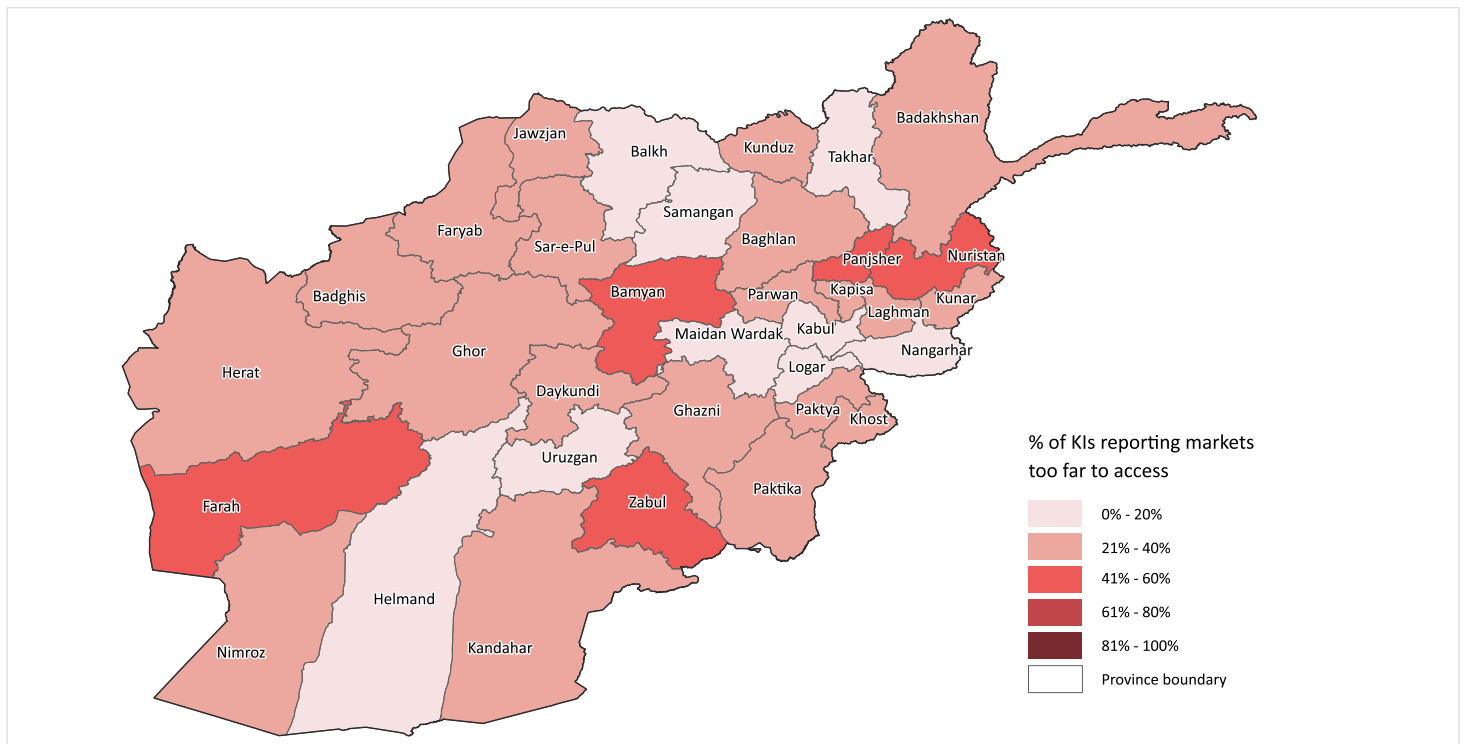


Geographic barriers play a central role in shaping these patterns. Areas characterized by remoteness, difficult terrain, or weaker market integration such as central highlands and border regions tend to face higher transportation costs and less efficient supply chains. These factors increase both the time and cost required to reach markets, limiting physical access while also contributing to higher prices of goods due to elevated transportation costs. In such contexts, even where markets are functioning, effective access remains constrained by the effort and resources required to reach them.

Seasonal dynamics further exacerbate these challenges. Winter conditions, including snowfall and road blockages in highland areas, as well as flooding and localized disruptions to transport routes, regularly limit mobility and reduce the flow of goods.¹² These disruptions increase transportation costs, delay supply chains, and reduce market availability in more isolated areas. As a result, households in these regions face compounded constraints, where both physical access and affordability deteriorate simultaneously, reinforcing barriers to meeting basic needs throughout the year.

Recently, shifts in regional trade dynamics have further shaped physical access to markets for restocking. While alternative trade routes through Iran and Central Asia have remained operational, they continue to involve higher transportation costs, longer delivery times, and logistical inefficiencies. Rail connectivity through corridors such as Aqina, Hairatan, and Khaf–Herat has partially offset these constraints, with increased cargo volumes supporting supply flows.¹³ These adaptations have not fully mitigated access challenges, and markets remain functional but under pressure, with elevated prices reflecting the cumulative impact of sustained trade disruptions and higher transport costs.

Map 3: Market Access Constraints, KIs Reporting “Markets are too far”, by Province (HSM March 2026).



Availability Remains Stable but Uneven Across Essential Items

Food Basket Products Widely Available but Responding to Seasonality and Trade Disruptions

Availability of staple food items across Afghanistan has generally remained stable, with key commodities such as wheat flour, pulses, and vegetable oil consistently present in markets according to the JMMI and WFP VAM market monitoring.

However, some variations have been observed for imported items. Rice in Afghanistan is largely imported primarily from Pakistan and other regional suppliers, making its availability more sensitive to border dynamics, transport costs, and currency fluctuations.² From the JMMI monitoring, food such as Palawi rice has shown localized reductions in its availability (Figure 5). In particular, the highest reductions are reflected in provinces such as Khost, Nuristan and Patkya. This reduction in availability of Palawi rice consistent with the start of border closures with Pakistan back in October. Periodic trade frictions, increased transportation costs, and rerouting of imports through

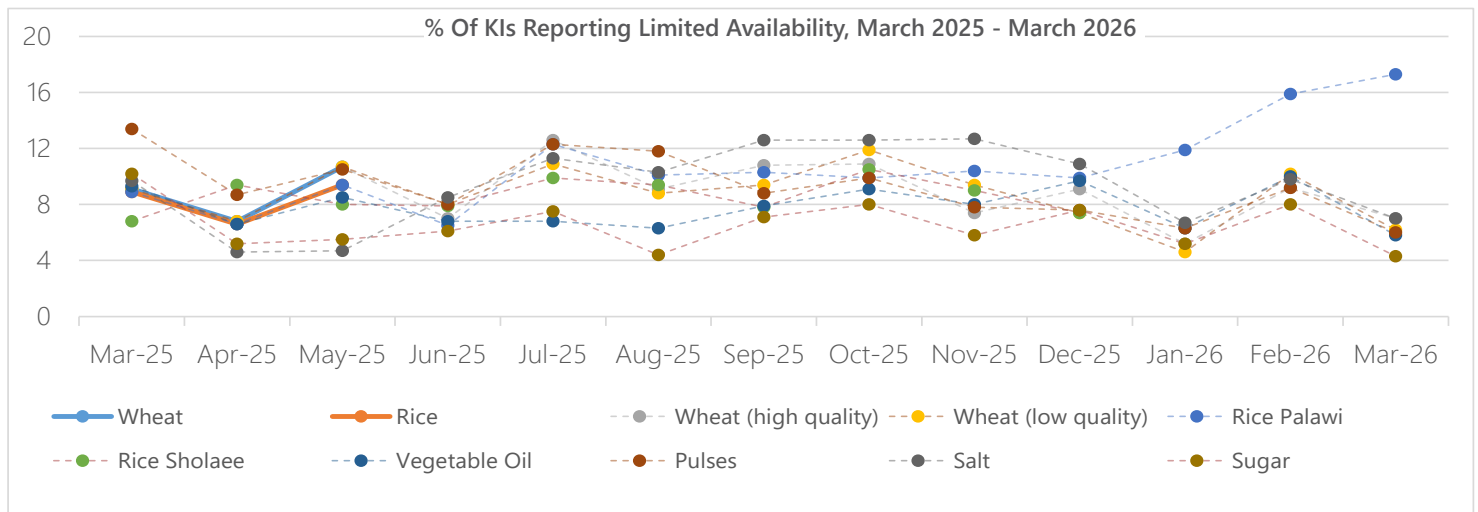
alternative corridors have likely contributed to reduced presence in markets.

Asymmetric Availability Across Essential Goods and Services

Availability of WASH items remains more constrained than that of staple foods, with products such as sanitary pads, cotton cloths, and water containers more frequently reported as limited or unavailable in some markets. The reported unavailability of sanitary pads was largely attributed by KIs to low demand; however, this may reflect the influence of social norms that suppress both expressed demand and visible supply. As a result, these items may be underrepresented in formal retail channels, with access potentially limited to informal or less accessible distribution mechanisms.

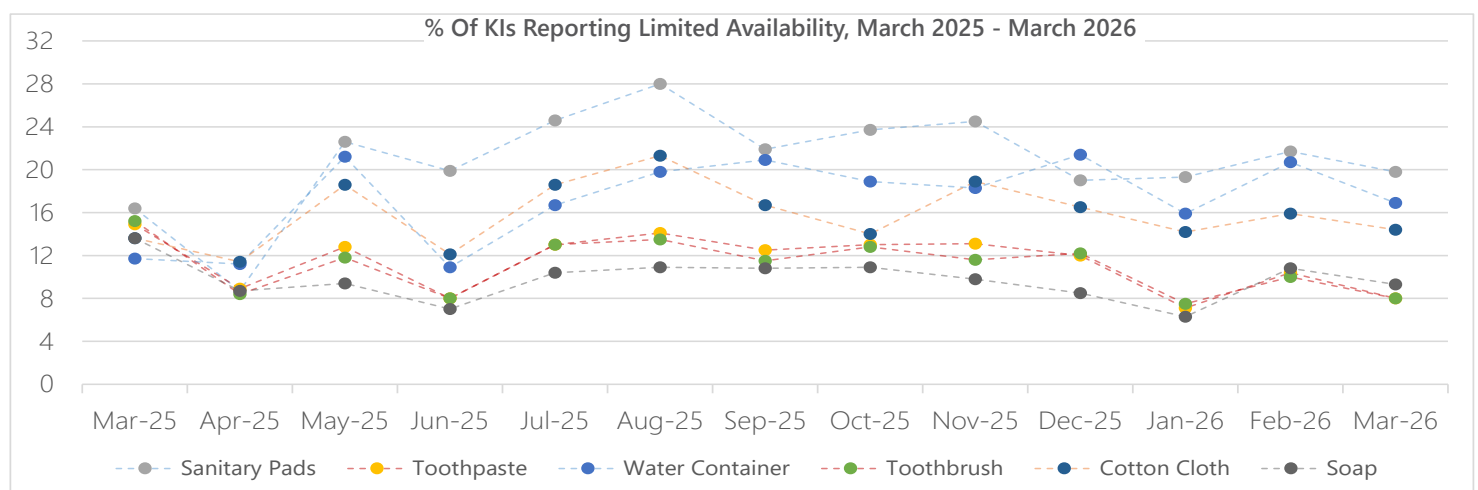
Additional factors contributing to limited availability include affordability barriers and weak distribution networks, particularly in rural areas. Consequently, lower reported demand may partially reflect access and cultural constraints rather than an absence of need, reinforcing reduced market presence of these items.

Figure 5: Availability of Food Items, March 2025 - March 2026.



Note: In June 2025, the JMMI questionnaire changed to disaggregate Wheat into Wheat (high quality), Wheat (low quality) and Rice into Rice (Palawi) and Rice (Sholae). Therefore, there is a break in the timeline presented above for these products.

Figure : Availability of WASH Items, March 2025 - March 2026.



Conclusion

Across Afghanistan, markets remain broadly functional and staple goods are generally available; however, access is increasingly constrained by affordability rather than supply. The cost of the Minimum Expenditure Basket (MEB) continues to exceed household income for most population groups, reflecting declining real incomes, limited livelihood opportunities, and rising non-food costs.

Seasonal dynamics and regional instability, particularly disruptions to trade routes and rising transportation costs, have further reinforced upward pressure on prices. While alternative supply routes remain operational, they continue to operate at higher cost, limiting any meaningful relief to households. At the same time, geographic remoteness and infrastructure constraints compound these pressures, particularly in rural and hard-to-reach areas where both physical and financial access to markets remain restricted.

Although food items are widely available, gaps persist for some non-food items, highlighting uneven supply chain functionality across commodities. Looking ahead, temporary seasonal improvements are unlikely to offset structural constraints such as low incomes, a sustained gap between income and essential expenditure (MEB) and the reliance on imports vulnerable to regional disruptions. Affordability pressures are expected to remain the main barrier to meeting basic needs, particularly for vulnerable groups such as returnees and female-headed households.

Endnotes

- 1 Humanitarian Needs and Response Plan. January 2026. Source: [link](#)
- 2 WFP. "Asia-Pacific Regional Office: Afghanistan-Pakistan conflict & Iran spillover impacts". March 2026. Source: [link](#)
- 3 FAO. Global Agrifood Implications of the 2026 Conflict in the Middle East. March 2026. Source: [link](#)
- 4 UNHCR mobilizing across region as Middle East crisis escalates. March 2026. Source: [link](#)
- 5 REACH Afghanistan. Joint Market Monitoring Initiative (JMMI) Rounds 57-69. Accessible via the IMPACT Initiatives Resource Center: <https://www.impact-initiatives.org/resource-centre/>.
- 6 FEWS Net. "Emergency outcomes expected to persist until the 2026 harvest begins". April 2026. Source: [link](#)
- 7 REACH Afghanistan. "Quarterly Markets Overview July 2025". Accessible via the IMPACT Initiatives Resource Center: <https://www.impact-initiatives.org/resource-centre/>.
- 8 REACH Afghanistan. "Whole of Afghanistan Assessment - WoAA". 2025. Source: [link](#)
- 9 World Bank Group. "Afghan Economy Expands Amid Persistent Challenges". December 2025. Source: [link](#)
- 10 European Union Agency for Asylum. "COI Report - Afghanistan: country focus". December 2025. Source: [link](#)
- 11 FEWS Net. "Afghanistan Key Message Update, March - September 2026: Emergency outcomes expected to persist until the 2026 harvest begins". April 2026. Source: [link](#)
- 12 OCHA. "Afghanistan: Humanitarian Update, January 2026". April 2026. Source: [link](#)
- 13 WFP. "Afghanistan: Weekly Market Report: Issue 292". April 2026. Source: [link](#)

ABOUT REACH

REACH Initiative facilitates the development of information tools and products that enhance the capacity of aid actors to make evidence-based decisions in emergency, recovery and development contexts. The methodologies used by REACH include primary data collection and in-depth analysis, and all activities are conducted through inter-agency aid coordination mechanisms. REACH is a joint initiative of IMPACT Initiatives, ACTED and the United Nations Institute for Training and Research - Operational Satellite Applications Programme (UNITAR-UNOSAT).