

Market Assessment: Border Disruptions & Market Stress

April 2026 | Afghanistan

Context & Rationale

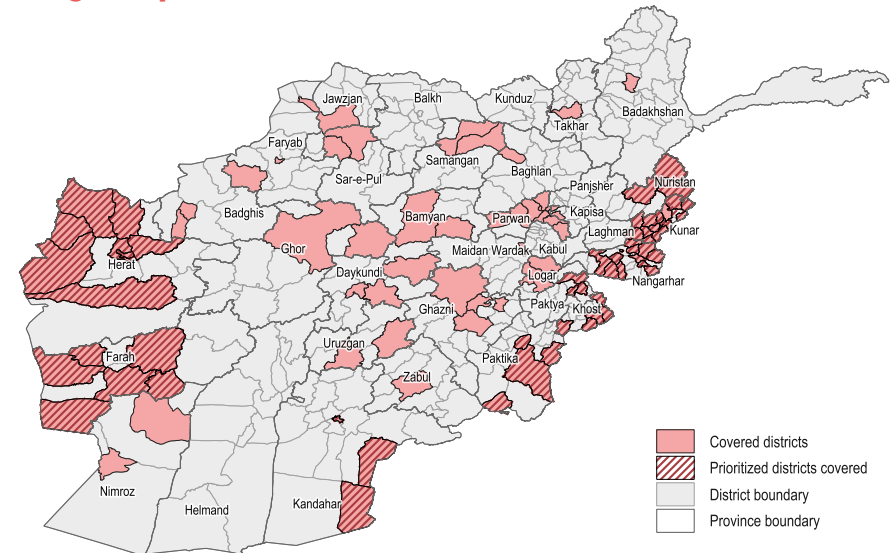
Since late 2025, intermittent disruptions to cross-border movement, particularly along the Afghanistan–Pakistan border, have periodically constrained trade flows, with disruptions intensifying around January 2026 amid renewed tensions and insecurity. These developments have contributed to localized population movements and raised concerns regarding the functioning of local markets, the continuity of supply chains, and the ability of traders to operate consistently.¹ Given the reliance of many Afghan markets, especially in border-adjacent and displacement-affected areas, on imported goods, informal trade routes, and regular road access, even short-term disruptions can have significant implications for the availability and pricing of goods, as well as for household access to essential commodities.

Based on data collected through the April round of JMMI, this round incorporated targeted questions to better understand the impact of border closures, particularly along the Pakistan border, as well as broader regional disruptions, including reduced imports from Iran, on supply chains and local market conditions.

Key Messages

- Market disruptions linked to insecurity and border-related movement restrictions were reported across assessed regions, affecting traders' ability to maintain regular operations through temporary shop closures, supply chain disruptions, and restocking challenges. Eastern and southeastern regions reported the highest levels of disruption, while impacts in the southern and western regions appeared comparatively more limited.
- Increased operational and financial pressure on traders was consistently reported across assessed markets. Vendors commonly highlighted higher supplier and transportation costs, growing reliance on credit to purchase commodities, and barriers to meeting demand for food and non-food items, particularly in areas affected by displacement and border restrictions.
- Demand trends varied across regions. Markets in Nuristan, Nangarhar, Khost, and Nimroz more commonly reported increased demand linked to the arrival of people into communities and seasonal trends, while markets in Paktika, Farah, and Herat more frequently reported reduced demand associated with declining purchasing power and increased prices.

Coverage Map



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 in April. 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 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.

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Eastern Region: Kunar, Nangarhar and Nuristan

The following results presented are percentage of KIs at regional and province level. Most of the questions were asked with a recall period of 30 days.

Market Closures

24%

Of assessed markets had to close the shops due to the conflict. In **98%** of these cases operations were impacted: **55%** of KIs had significant impacts and for **43%** minor impacts on their operations.

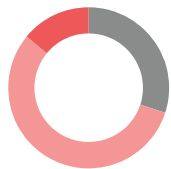
Percentage of KIs that reported markets closures due to conflict, per province:

61% Nuristan
25% Kunar
15% Nangarhar

Percentage of KIs that reported significant impacts on their operations due to closures for conflict, per province:

91% Nuristan
50% Nangarhar
42% Kunar

Supply chain disruptions since the escalation of conflict and related displacement in the eastern region since mid-January



30% No disruptions, supply chains functioning normally
56% Some disruptions, supply chains somewhat impacted
14% Major disruptions, supply chains significantly impacted

Challenges affecting restocking

The majority of vendors expected challenges in restocking both food and non-food items in the coming days (**51%**). At the time of data collection, the main operational constraints to restocking food reported by KIs included: Border closures or restrictions (**81%**), transportation challenges (**35%**), supply chain disruptions (**35%**).

For access challenges, **41%** of vendors identified natural disasters as the main barrier followed by **39%** reporting conflict/road blocks by armed actors. For natural disasters, the main disaster identified by **52%** of KIs was flooding.

69% Of vendors borrowed money/purchased on credit to buy commodities.

62% Reported having barriers to meet demand of food and non-food items.

Food Items

51%

Of assessed market vendors reported an increase in demand of food items. The main reason for this increase was due to the arrival of people in the community (**69%**).

In Nuristan **83%** of KIs and in Nangarhar **63%** reported that demand for food items increased. In Kunar, the majority of KIs indicated that demand stayed the same (**47%**). In Nuristan (**80%**) and Kunar (**91%**) the main reason was the increased number of people arriving at the community, while in Nangarhar it was reported as a seasonality trend (**69%**).

78%

Of assessed market vendors reported food price increases with transportation cost being the main reason (**54%**). In their perception, this change was due to the conflict (**81%**).

21% Of KIs had been advice to/or decided to sell only to local people in the community.

Products reported being mass purchased in the region, by percentage of KIs

43% Flour
41% Sugar
28% Vegetable oil

In Nuristan, another product that was reported as being mass purchased was soap (**56%**) while for Kunar it was rice (**23%**).

Non- Food Items

39%

Of assessed markets reported an increased in demand of non-food items. The main reason for this increased was due to the arrival of people in the community (**72%**).

59%

Reported non-food item prices increase with the main reasons being increased price from suppliers (**56%**), affected by exchange rate (**56%**) and higher transportation costs (**52%**).

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Southeastern Region: Khost and Paktika

The following results presented are percentage of KIs at regional and province level. Most of the questions were asked with a recall period of 30 days.

Market Closures

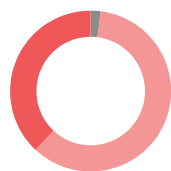
47%

Of assessed markets had to close the shops due to the conflict. In **100%** of these cases operations were impacted: **50%** of KIs reported this had significant impacts and **50%** reported minor impacts on their operations.

100%

Of KIs in Paktika reported markets closures due to conflict. In Khost, the assessed vendors did not have to close their stores in the weeks previous to data collection.

Supply chain disruptions since the escalation of conflict and related displacement in the southeastern region since mid-January



- 2%** No disruptions, supply chains functioning normally
- 60%** Some disruptions, supply chains somewhat impacted
- 38%** Major disruptions, supply chains significantly impacted

Challenges affecting restocking

The majority of vendors expected challenges restocking both food and non-food items in the coming days (**76%**). At the time of data collection, the main operational constraints to restocking food reported by KIs included: Border closures (**93%**), increased prices from suppliers (**48%**) and reduced availability of goods from suppliers (**35%**).

For access challenges, **49%** of vendors identified seasonality as the main barrier followed by **69%** reporting natural disasters and conflict by **17%**.

85% Of vendors borrowed money/purchased on credit to buy commodities.

88% Reported having barriers to meet demand of food and non-food items.

Food Items

50%

Of assessed market vendors reported a decrease in demand of food items. The main reason for this decrease was due to the increase in prices (**96%**).

In Paktika **63%** of KIs reported a decrease in demand of food items. On the contrary, in Khost **50%** of KIs reported an increase. In Paktika **94%** of KIs reported as the main reason for this decrease the lack of income and for Khost **100%** of KIs reported that demand had increased due to new people arriving.

98%

Of assessed market vendors reported food price increases due to suppliers having increased the prices as the main reason (**88%**). In their perception, this change was due to the conflict (**91%**).

26% Of KIs had been advice to/or decided to sell only to local people in the community.

Products reported being mass purchased in the region, by percentage of KIs

38% Flour
25% Sugar
23% Vegetable oil

In Khost, another product that was reported as being mass purchased was tomatoes (**23%**). In Paktika, no products were reported to have been mass purchased.

Non- Food Items

50%

Of assessed markets reported a decrease in demand of non-food items. The main reason for this decrease was due to the increase in prices (**98%**).

96%

Reported non-food item prices increases with the main reasons being increased price from suppliers (**96%**), higher transportation costs (**79%**) and reduced availability of commodities (**47%**).

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Southern Region: Kandahar and Nimroz

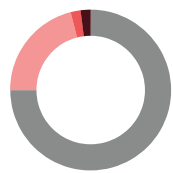
The following results presented are percentage of KIs at regional and province level. Most of the questions were asked with a recall period of 30 days.

Market Closures

0% Assessed markets in Kandahar and Nimroz had to close due to the conflict and/or border closures in the region.

42% Of KIs in the region had barriers to meet demands due to difficulties receiving goods due to restrictions on movements (roads or border closure).

Supply chain disruptions since the escalation of conflict and related displacement in the eastern region since mid-January



- 75%** No disruptions, supply chains functioning normally
- 21%** Some disruptions, supply chains somewhat impacted
- 2%** Major disruptions, supply chains significantly impacted
- 2%** Supply chains not functioning

Challenges affecting restocking

The majority of vendors **did not** expect challenges restocking both food and non-food items in the coming days (**94%**). Nonetheless, the main operational challenges expected by KIs to restocking food included: Border closures (**100%**), increased prices in transportation (**60%**) and increase prices from suppliers (**40%**).

For access challenges, **49%** of vendors identified seasonality as the main barrier followed by **44%** natural disasters.

70% Of vendors borrowed money/purchased on credit to buy commodities.
36% Reported having barriers to meet demand of food and non-food items.

Food Items

25% Of assessed market vendors reported an increase in demand of food items while **67%** reported that demand remained the same. The main reason for the increase was seasonality trends (**81%**).

In Nimroz **56%** of KIs reported an increase in demand of food items while in Kandahar, the majority of KIs indicated that demand stayed the same (**78%**). In Nimroz **94%** of KIs reported as the main reason for this increase the seasonality.

63% Of assessed market vendors reported food price increases due to higher transportation costs as the main reason (**85%**). In their perception, this change was due to the conflict (**45%**).

27% Of KIs had been advice to/or decided to sell only to local people in the community.

Products reported being mass purchased in the region, by percentage of KIs

40% Sugar
37% Rice
31% Vegetable oil
 In Kandahar, another product that was reported as being mass purchased was potatoes (**36%**) while for Nimroz it was LPG gas (**50%**).

Non- Food Items

27% Of assessed markets reported an increase in demand of non-food items while **62%** reported that it stayed the same. The main reason for this increase was due to a seasonal behaviour (**88%**).

56% Reported non-food item prices increase with the main reasons being higher transportation costs (**81%**), seasonality (**70%**) and exchange rate effects (**62%**).

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Western Region: Farah and Herat

The following results presented are percentage of KIs at regional and province level. Most of the questions were asked with a recall period of 30 days.

Market Closures

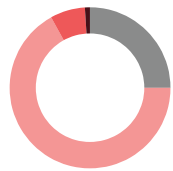
4%

Of assessed markets had to close the shops due to the conflict. In **100%** of these cases operations were impacted: **25%** of KIs reported this had significant impacts and **75%** reported minor impacts on their operations.

13%

Of KIs in Farah reported markets closures due to conflict. In Herat the assessed vendors did not have to close their stores in the weeks previous to data collection.

Supply chain disruptions since the escalation of conflict and related displacement in the eastern region since mid-January



- 25%** No disruptions, supply chains functioning normally
- 67%** Some disruptions, supply chains somewhat impacted
- 7%** Major disruptions, supply chains significantly impacted
- 1%** Supply chains not functioning

Challenges affecting restocking

The majority of vendors **did not** expect challenges restocking both food and non-food items in the coming days (**67%**). However, the main operational challenges expected by KIs to restocking food and non food items included: Border closures (**82%**), increased prices from suppliers (**59%**) and higher transportation prices (**53%**).

For access challenges, **25%** of vendors identified natural disasters as the main barrier followed by **25%** seasonality and conflict/border closure **5%**.

- 74%** Of vendors borrowed money/purchased on credit to buy commodities.
- 36%** Reported having barriers to meet demand of food and non-food items.

Food Items

50%

Of assessed market vendors reported a decrease in demand of food items. The main reason for this decrease was due to the increase in prices (**89%**).

In Farah **60%** of KIs reported a decrease in demand of food items. Similarly, in Herat **38%** of KIs reported a decrease in demand. In Farah **89%** of KIs reported as the main reason for this decrease the lack of income. In Herat, both lack of enough income and the increase in prices were reported as the causes for this reduction in demand (**96%**).

61%

Of assessed market vendors reported food price increases due to suppliers having increased the prices as the main reason (**80%**). In their perception, this change was due to the conflict (**75%**).

23% Of KIs had been advice to/or decided to sell only to local people in the community.

Products reported being mass purchased in the region, by percentage of KIs

- 34%** Rice
 - 28%** Vegetable oil
 - 25%** Flour
- In particular for Farah, Palawi rice was reported as being mass purchased (**16%**). In Herat, an additional product among the main being mass purchased was bread (**28%**).

Non- Food Items

46%

Of assessed markets reported a decrease in demand of non-food items. The main reason for this decrease was due the increase in prices (**78%**).

60%

Reported non-food item prices increased with the main reasons being increased price from suppliers (**90%**), higher transportation costs (**40%**) and exchange rate effects (**24%**).

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Endnotes

1 FAO. Global Agrifood Implications of the 2026 Conflict in the Middle East. March 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).