

Researching livelihoods and  
services affected by conflict

# The social life of the onion: the informal regulation of the onion market in Nangarhar, Afghanistan



Working Paper 26

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# About us

Secure Livelihoods Research Consortium (SLRC) aims to generate a stronger evidence base on how people make a living, educate their children, deal with illness and access other basic services in conflict-affected situations. Providing better access to basic services, social protection and support to livelihoods matters for the human welfare of people affected by conflict, the achievement of development targets such as the Millennium Development Goals and international efforts at peace-building and state-building.

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- State legitimacy: experiences, perceptions and expectations of the state and local governance in conflict-affected situations
- State capacity: building effective states that deliver services and social protection in conflict-affected situations
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# Acronyms and glossary

ACCI	Afghanistan Chamber of Commerce and Industry
AFN	Afghan Afghani [currency]
AREU	Afghanistan Research and Evaluation Unit
ARD	Agriculture and Rural Development
ASR	Agricultural Sector Review
CARD-F	Comprehensive Agriculture and Rural Development Facility
MAIL	Ministry of Agriculture, Irrigation and Livestock
NCCI	Nangarhar Chamber of Commerce and Industry
PKR	Pakistan rupee
SLRC	Secure Livelihoods Research Consortium
USD	United States Dollar

<i>Arati</i>	Trader
<i>Bazar</i>	Market
<i>Hawala</i>	Informal value transfer system based on a network of money brokers which functions primarily on trust and the honour and performance of the brokers
<i>Jirib</i>	Traditional unit of land measurement in the Middle East and southwestern Asia. In Afghanistan 1 jirib is equal to 0.2 hectar
<i>Ittihadia</i>	Union
<i>Kantha</i>	Weigh station
<i>Maliks</i>	Village leaders
<i>Purdah</i>	Literally “curtain”, here referring to the cultural practice of women’s seclusion that restricts their presence in public spaces
<i>Sabji mandi</i>	Vegetable market
<i>Seer</i>	Traditional unit of mass and volume. 1 seer is equal to approximately 7 kg

# Executive summary

## What is this study about?

Within Afghanistan's agricultural economy, there are many obstacles that cross-cut social, economic, and political trajectories to keep rural livelihoods constrained. A recent development programme, the Comprehensive Agriculture and Rural Development Facility (CARD-F), which aims to lift farmers from poverty, has focused on supporting value chains, identifying a lack of market information and access to credit systems as the primary constraints to market engagement. This study, based on evidence from the rural onion economy in Nangarhar, critically analyses and challenges this assumption. The focus of this paper is instead on the informal political and social factors embedded in local and national economies. These systems of social bonds and trans-border ethnic, familial and/or political connections are based on trust and are deeply engrained in livelihoods; they are, in practice, the primary systems that regulate and govern rural markets. Thus, the research presented here aims to shift the focus from a simplistic and idealised examination of value chains and market analysis and shed light on how rural markets really function. In order to inform effective policy dialogue, the authors particularly hope to emphasise that economic interventions to bolster rural livelihoods cannot be separated from engaging with the local sociopolitical context. Finally, as the first of four case studies on rural and urban markets currently underway in Afghanistan, this paper seeks to provide an integrated and comprehensive understanding of access to markets in fragile and conflict-affected environments.

## What did we do?

Data collection was carried out in Nangarhar and Peshawar by researchers from the Afghanistan Research and Evaluation Unit in two rounds. First, in-depth qualitative interviews with 56 traders and farmers were conducted in December 2013, focusing on: structures and technologies (storage rooms, roads, and transport) involved in the onion trade; price setting; the seasonality of the market; the life histories of the traders, including accounts of migration and displacement; and relations and networks between Jalalabad and other provincial capitals, Pakistani traders, and Afghan traders in Peshawar. After preliminary analysis of this data, 14 more interviews were held with traders and farmers in February 2014 on: onions as an alternative to opium poppy; crop diversification and availability of water sources; income and local credit systems; and, power relations, volumes, and margins between Jalalabad and Peshawar markets.

## What did we find?

A key finding of this research is that there are a number of informal systems that govern the rural onion market in Nangarhar. The most prominent of these are social networks that determine trade relationships and access to informal credit schemes, and in Jalalabad, powerful local traders who have formed associations and are highly connected politically. Influential big traders have a huge impact on the onion trade's economic landscape as they set local prices for traders, control access to market information, and actively quell income opportunities for farmers and small traders by stockpiling goods and regulating cash exchange. Sociopolitical connections are profoundly important as the market functions on relationships of trust, with no initial or up-front cash exchange. Economic relationships are therefore deeply enmeshed in broader networks of ethnic, linguistic, and social commonalities. This is especially true for traders with past migratory connections to Pakistan. Not surprisingly, this means that the market is heavily socially regulated, which can have exclusionary effects for those lower down the production chain.

Beyond this, there are market considerations in both Pakistan and India that influence trade in Nangarhar, as Jalalabad functions as Afghanistan's main onion transit point. Further, the market is inherently risky as onions are highly perishable and there are no storage facilities along the trade routes, This can mean losses of up to 40% of the seasonal harvest. This has implications for market prices as the lack of buffer stock leads to an inability to handle short-term fluctuations in supply and demand, leading to rapid fluctuations in sale prices.

## What does it mean?

Given Nangarhar's intertwined social, political, and economic landscapes, as well as larger market considerations from Pakistan and India, there must be a critical and realistic assessment of the degree to which boosting the local value chain will mitigate these broader, contextual challenges. Further, contradicting the view that a lack of access to formal credit hinders market expansion, findings from this research suggest that informal credit schemes based on social and political networks are readily available. Owing to the deeply integrated nature of these relationships, it is not clear that formal credit would make much difference. As such, policy makers thinking about market expansion should pay more attention to such interpersonal connections and how they relate to technical interventions based on traditional economic knowledge. In a context in which sociopolitical spheres interact with and influence local economic systems, this paper highlights the importance of considering informal market regulation throughout the policy-making process.

# 1 Introduction

There are many barriers to developing the rural sector in Afghanistan. Among the most significant are [a] lack of information for agricultural statistics, markets and prices inhibiting risk taking by farmers, locking them into a subsistence cropping and traditional off-farm economic activity cycle .... a lack of access to credit, at affordable rates, that allow[s] smallholder farmers and rural enterprises to finance investment in assets and resources that help them to improve productivity, output and earnings [and] poor rural infrastructure that inhibits production, distribution and access to markets. (CARD-F, 2013: 3)

The opening pages of the Afghan government's Comprehensive Agriculture and Rural Development Facility (CARD-F) annual report identify a lack of information about prices and a lack of access to credit as the most significant constraints preventing smallholder farmers from risk-taking and market engagement.<sup>1</sup> The assumption is widely made but poorly evidenced. It draws from an abstract, simplistic and idealised version of how agricultural commodity markets should work – but rarely do (Ali Jan and Harriss-White, 2012). To reduce agricultural commodity markets to simply the flow of price information ignores two other key dimensions. The first is that the ways in which agricultural traders set the terms of trade influences how profits are extracted, investments are made and returns are granted to producers. The second is that market exchange is not simply about the buying or selling of one commodity. Each exchange is embedded in multiple exchange relationships of credit, social relationships and power. Economic activity does not take place separately from social relationships, but is deeply embedded in them (Portes, 2010). This paper, based on a study of the onion markets of Nangarhar, investigates how one agricultural commodity market works in practice and the ways in which social relationships govern access to the market in terms of information, credit and trading costs. It is the first in a series of SLRC Afghanistan studies that will explore the economic activities of rural people. The studies seek to understand how economic life is structured from an actor's perspective and engage this with the more sectorial or value chain analysis view that CARD-F takes. It aims to build and improve understanding of the complexity and diversity of real commodity markets with a view to driving more realistic policy making.

There are several reasons to focus on the onion trade. First, it is a cash crop, traded as an export commodity, and its production has reportedly been expanding. Second, it has been seen as a potential alternative crop to opium poppy, offering comparable returns and therefore an alternative source of income to opium poppy. Third, it is precisely this type of high-value vegetable crop, growing in a well-resourced area with good market access, that, it is claimed could drive agricultural growth (World Bank, 2014).

It is striking that much of the discussion on the ways in which politics and government works at the national and sub-national levels in Afghanistan is structured around 'good governance'. Yet the ways in which the economic rather than the political marketplace is governed have received far less attention. As will become clear from this paper and a reading of a companion paper on political governance in Nangarhar (Jackson, 2014), the political and economic marketplaces in Nangarhar are closely intertwined. The same actors hold prominent positions in both arenas and draw on their political and economic resources to bolster their relative strength in both. For those lower down the value chain – the onion producers and the district-level traders – ignorance of market prices for onions or lack of access to credit is rarely the main constraint. Price information is readily available and informal credit is widely accessed. Rather it is their relative weakness in the economic market place that means they are price takers rather than price setters. It is certainly true that the onion market displays considerable price volatility, making it intrinsically risky and uncertain for smallholders to engage in. It is also true that there are major infrastructural constraints, not least in storage capacity for onions. But it is equally true, as this paper will make clear, that prices are not simply set by demand and supply, although this is a factor. Rather, powerful actors within the onion value chain manipulate prices and costs to their

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<sup>1</sup> CARD-F is a programme run jointly by a group of Afghan ministries under the Agriculture and Rural Development (ARD) cluster that seeks to support growth in rural incomes and strengthen markets in order to combat the growing of opium poppies. Its focus is primarily on 'supporting selected value chains in production, processing and distribution and market development, addressing critical infrastructure bottlenecks to their growth' (CARD-F, 2013: 4).

advantage, thereby concentrating power within the market with exclusionary effects. District producers and traders can and do find way around such practices within Afghanistan, but it is less easy to negotiate the range of rent-seeking practices surrounding cross-border trade with Pakistan, where powerful traders collude with powerful political figures.

The paper briefly describes the methods and study sites before exploring the context of Nangarhar and the regional onion economy that straddles Afghanistan, Pakistan and India. It then investigates the district-level onion trade from the onion field to market, drawing on the accounts of onion producers and district traders. It examines the strategies deployed by some actors to circumvent the informal regulation of access to the Jalalabad market by finding other market opportunities in Kabul or Pakistan. It moves on to describe the leading traders in Jalalabad's fruit and vegetable market and the strategies they use to maintain control over the provincial market. Jalalabad's place within the regional onion economy is also examined. The names of the interviewees have been kept anonymous in the text although the identity of public figures and well-known actors of the political and economic scene of Nangarhar is given. There is a final discussion bringing together the issues of risk and trust in the onion trade before the conclusion addresses the implications for policy and practice.

## 1.1 Methods

The case study draws on qualitative in-depth interviews conducted in Nangarhar and Peshawar by the Afghanistan Research and Evaluation Unit SLRC team in two rounds. Data was collected from informants in the first round of fieldwork on: the structures and technologies (storage rooms, roads and transport) involved in the onion trade; price setting; the seasonality of the market; the life history of the traders, including accounts of migration and displacement; relations between Jalalabad and the other provincial capitals involved the onion trade; relations between Jalalabad market, Pakistani traders and Afghan traders in Peshawar; and the margins and networks of the onion trade between Jalalabad and the districts in Nangarhar.

The first round of research was undertaken in mid-December 2013. Among the 56 informants interviewed were 21 traders in the Jalalabad fruit and vegetable market and eight in the fruit and vegetable market of Peshawar in Pakistan. A further nine traders in each of Balah Bagh and Mazina Village (in Sukhrod and Rodat districts in Nangarhar respectively) were included. An additional nine interviews were conducted among farmers in Dar i Noor and Bihsud.

Based on a preliminary analysis of the results a second round of 14 interviews was held during the third week of February 2014 with traders in Jalalabad and Peshawar and farmers living in different villages of Sukhrod and Rodat. Information collected in the districts in this round focused on the introduction of onion in Nangarhar as an alternative to opium poppy, crop diversification and the availability of water sources in the two districts of Sukhrod and Rodat, as well as costs, income and the credit system of the onion market for farmers in the districts. Information collected in Jalalabad and Peshawar focused on the volumes and margins of the traders and power relations within the two markets.

Annex I contains a lists all the informants in the two rounds of interviews and the informant codes. Table 1 below summarises this information.

**Table 1: Informants identified by code and activity**

	Peshawar market	Jalalabad market	District market Rodat	District market Sukhrod	District market-Dar i Noor	District market-Bihsud
<b>Onion traders</b>	9-12,23-26,13b-14b	1-3,6-17, 27-33,9b-12b	8,14,22,38,39	7,13,21,35		
<b>Farmers</b>			4-6b	1-3b	15,16,17, 40,41	47,50,55,56

During the first round of interviews the villages visited were Balah Bagh and Mazina. These two villages, the first in Sukhrod and the second in Rodat, were selected after informal chats with Jalalabad market

traders who indicated that these villages were the best locations of onion production, in terms of both quality and quantity, in the two districts. As one of the major traders in the city comes from Balah Bagh, small traders in the village can rely upon a social network connecting them to the Jalalabad market. Its upstream position and the proximity to the city facilitate farmers aiming to work as intermediaries between the village and this provincial market. In contrast, the Mazina interviews provide an account of the relations established between its traders and their counterparts in Kabul and Peshawar, indicating how traders have tried to circumvent the barriers of the Jalalabad onion market.

The second round of interviews aimed to assess the conditions of farmers in more marginalised villages of Sukhrod and Rodat that do not have high potential for onion production. An additional variable for the selection of villages, and highly relevant to the choices made by the SLRC team, was their accessibility with respect to the area's highly volatile conditions. Between December 2013 and February 2014 the Ministry of Agriculture, Irrigation and Livestock district offices and village *maliks* (leaders) communicated a deteriorating security situation. A significant Taliban presence in Sukhrod in early 2014 indicated that a second visit to Balah Bagh would be unwise. Therefore Masti Khil, Qalai Maroof and Wata Poor were selected from among the 20 villages reported as accessible. Darab Zala, Merano Kalli and Baba Kalli were selected from 15 possibilities in Rodat after a similar process.

## 2 The context

The selection of Nangarhar as the location for a case study on agricultural commodity markets and the focus on onions was guided by several considerations. First, the SLRC Afghanistan research programme has sought to link analysis of politics and markets, and a study of the political economy of Jalalabad was already planned. (The second market study will be undertaken in Kandahar, where a political economy study is underway.) Second, Nangarhar is one of the richer agricultural areas of Afghanistan because of its relatively low altitude and relatively reliable irrigation. With a major urban economy in Jalalabad and close cross-border links to Pakistan, the potential for agriculture-based growth is as good if not better as anywhere in Afghanistan. Third, the expansion of onion cultivation, in part as a consequence of the decline of opium poppy cultivation, has been a response to a market opportunity, so the onion market offered the opportunity to explore the ways in which an agricultural commodity market works in practice.

### 2.1 The geographical setting

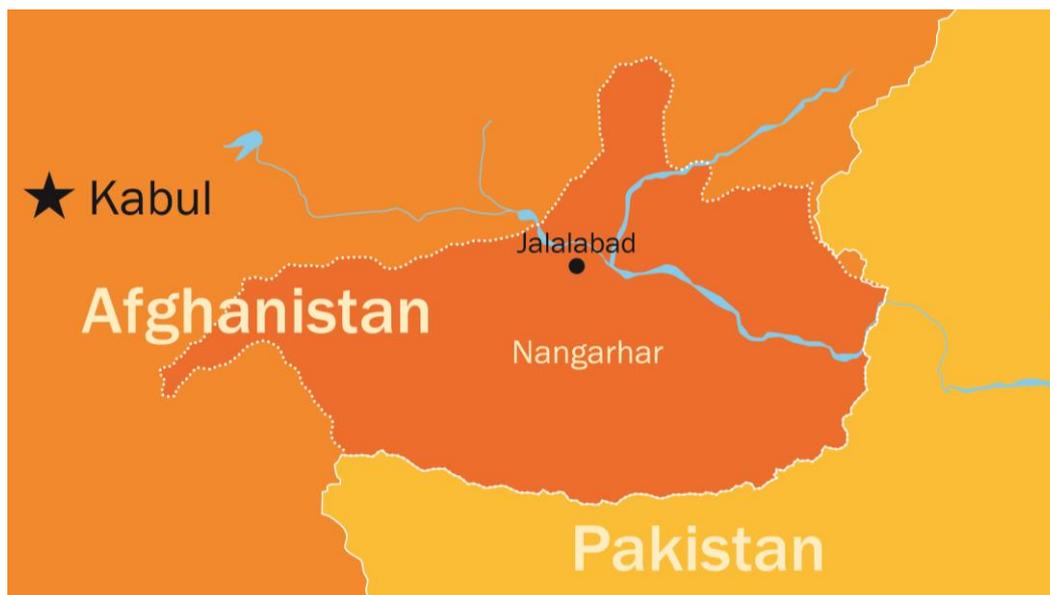
The geography of Nangarhar is characteristic of the major regional centres of Afghanistan. At its core is an irrigated plain which supports a rich agricultural economy linked to the provincial capital, Jalalabad city. This plain is surrounded by a mountainous hinterland. Jalalabad's irrigated plain does not appear to suffer from major water constraints and supports a rich agricultural economy.

There are a number of features of Nangarhar's economy that make it distinctive. It is positioned on the border with Pakistan and as part of the Pashtun cultural zone it is strongly linked into Pakistan and its relatively more prosperous economy. Nangarhar is also relatively ethnically homogenous and does not have significant ethnic minority populations. The position of Pakistan – both as a past source of refuge and a continuing source of employment – has acted to orient Jalalabad strongly to the south and Peshawar rather than to the north and Kabul. This is reflected in the use of the Pakistan rupee (PKR) rather than the afghani (AFN) as the everyday currency, which also means that wage rates are lower than elsewhere in Afghanistan. But it is also a port city and the main route for trade between Pakistan and Kabul.

The geographical division between plain and mountain in Nangarhar also shapes the agrarian economy. In the hills and mountains there has long been a more marginal grain-deficit economy that is critically dependent on outmigration and remittance income from Pakistan. In contrast, the flat irrigated plains are an area of agricultural surplus and the location of expanding onion cultivation.

Two contrasting districts, Sukhrod and Rodat, both located in the irrigated plains (Figure 1), were selected as the locations for the study. They are both considered privileged in terms of proximity to the provincial capital and their good access to roads (MRRD, 2012), but there are important contrasts in terms of physical security and water security and these are seen to influence the levels of crop diversification, which are higher in Sukhrod and lower in Rodat.

**Figure 1: Map of Nangarhar showing districts and rivers**



About 4% of the irrigated land in Nangarhar is cultivated with onions. In 2013, of the 4,522 hectares under onion cultivation, just under half (2,100 ha) were in Sukhrod and Rodat (#7b, #8b). The expansion of onion cultivation in Nangarhar has been closely linked with the dynamics of the opium poppy economy and has grown since 2004 when opium poppy bans were implemented. However the cultivation of opium poppy is returning and in 2012 it was being cultivated again even in the peri-urban areas of Sukhrod (Mansfield and Fishstein, 2013)

Sukhrod benefits from its proximity to Jalalabad, relative security, paved roads, the availability of water sources, its high degree of commercialisation of agricultural production and strong networks with the elite of traders in the city centre. As Giovacchini (2013) points out, Sukhrod can be seen as part of the urban region of Jalalabad in which transportation and market access is a major driver for commercialisation.

Sukhrod receives water from the Surkh Ab River, which is sourced from Paktia and Hesarak district in Nangarhar and joins the Kabul River below the Darunta dam. In spite of the seasonality of these small rivers, which dry up quickly in the summer, the upstream villages of Sukhrod are reported to have a constant and reliable source of water throughout the year (Favre, 2005: 11). As the literature on opium poppy cultivation trends documents (Mansfield and Fishstein 2013) climate change impact on farmers' activity choices are not unknown in Nangarhar. In spite of the privileged position in terms of access to water canals upstream, water scarcity downstream has been pushing farmers to dig a large number of tube wells. As an example of the progressive reduction in access to water it should be noted that before 1997 Sukhrod farmers were cultivating sugar cane. However drought and water scarcity pushed them towards less thirsty crops, including opium poppy. Since its ban, the most marketable option for farmers has been onions, which require less water than wheat. Now 11% of Sukhrod's 11,891 irrigated hectares are cultivated with onion (#7b). Many farmers now also cultivate spinach, tomatoes, radishes and leeks for household consumption and as cash crops to be sold to provincial and district markets.

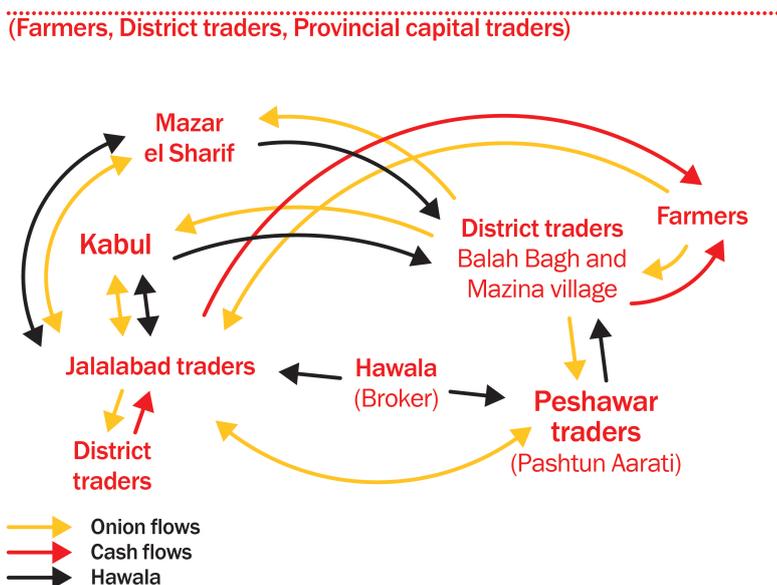
The second district, Rodat, is characterised by more insecurity and water constraints and lower levels of crop diversification. Here higher levels of opium poppy cultivation were reported, covering nearly 40% (2500 ha) of the irrigated land at their peak. Onion cultivation has only expanded from 500 ha to 900 ha since then. The relatively lower crop diversification is linked to water scarcity and limited access to markets and paved roads. In the study villages, potatoes, wheat and some vegetables were grown for household consumption. For villages downstream, such as Darab Zala, water scarcity and insecurity are particularly acute and influence crop choice. Due to recent insecurity in Rodat district some farmers are returning to cultivating poppy on very small plots of land to test the reaction of the government.

## 2.2 The regional onion economy

The onion economy is characterised by a season of production and exportation followed by a season of importation from Pakistan (Figure 2). This two-way flow is attributable largely to the absence of appropriate storage facilities in Afghanistan, working to the advantage of traders who extract profit from both directions of the trade. The storage rooms used by Afghan traders in Peshawar are only for potatoes, oranges, and in some cases vegetables (#23, #24, #25 and #26). The use of cold storage for onions is limited as they cannot be stored for more than a few days at temperatures of less than five degrees Celsius. Traders wanting to use other traders' storage rooms have to pay the electricity and fuel costs, which most interviewees said they could not afford.

Figure 2: The onion economy credit relations map

### Credit relations map



The harvest and export season in Afghanistan starts from May-June and continues until December. Thus the wholesale trade on onions in Jalalabad is based on Afghan production for eight months, with the first four months covered by production from Nangarhar, the next two months coming mainly from Kabul and Logar, and then the final two months from Kandahar. The imports from Pakistan start in December and continue until April. Imports of onions and shallots from Afghanistan were the third highest ranked commodity in terms of value of Pakistan's total imports in 2007 (with 11% of the total share), and the fifth ranked commodity in 2012 (with 4%) (PAJCCI, 2012: 24).

In Nangarhar the onion harvesting season starts in Sukhrod district in late April and then proceeds to Rodat where it continues until the end of June. The onions from Mazina village in Rodat district are meant to be the best produced in Afghanistan and are usually exported. In May, when the exports to Pakistan start, traders report there is a slight increase in the price of onions in the *sabji mandi* (vegetable market) of Jalalabad, and when the production from Punjab comes into Nangarhar the price slightly falls, rising again from December.<sup>2</sup> Punjab's harvesting season starts in November and continues in Sindh from mid-December until the end of March, feeding Afghanistan's need for imports until April.

<sup>2</sup> Exports to Pakistan from Sukhrod and Rodat open the season in May and last until the end of June. The price of onions per 100 kg bag in Jalalabad will start at around PKR 2,000 (\$20) and will rise to PKR 2,500 PKR (\$25) per bag towards the end of the harvest season in late November. The price in Jalalabad for a bag (100 kg) during the import season is around PKR 3,000 (\$30) and can reach up to 3,500 PKR (\$35). If the demand in India is very high due to crop failure or climate change events, such as floods, as was the case in 2013, the price per bag on the Pakistani market can reach up to PKR 6,000 (\$60) with a consistent benefit for the Afghan exports (#1,#3,#22,#27 and #29).

Pakistan is by far the main trading partner for Nangarhar's onions, and most of the trade goes through the Torkham border, although not necessarily through the wholesale market in Jalalabad, with some farmers and small traders trading directly with the wholesale markets of Kabul or Peshawar.

But Jalalabad is certainly a key hub between the west and east with its close links geographically, culturally and economically to Pakistan: 50% of the business of the Jalalabad onions traders stays within the province, another 25% goes to Kabul and 25% to Peshawar.<sup>3</sup> Favre (2005) reported that Jalalabad has limits in its capacity in terms to absorb the trade of onions, potatoes and tomatoes. The reported near doubling of the number of wholesalers in Jalalabad between 2006 and 2011 (with the support of former Governor Gul Agha Sherzai) suggests considerable growth in terms of international trade with Pakistan and national trade with centres such as Kabul and Mazar.

However the cross-border trade with Pakistan is only one piece of a wider onion trade system that connects with India: prices in Pakistan and Afghanistan can be heavily influenced by demand in India, as was found in 2013 when they rose dramatically. There is strong evidence that the Indian onion trade itself is subject to price manipulation by major traders to the detriment of its farmers (*The Economic Times*, 2013). It is possible, although this study does not address this, that market collusion stretches from the major players in the onion trade in India to the Peshawar onion market via Karachi. While it is mainly Afghans in the Peshawar market who handle the cross-border trade, beyond Peshawar the onion trade is in the hands of a group of Punjabi traders. There must be doubt therefore that even outside Afghanistan that the onion trade is subject to 'free' market conditions.

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<sup>3</sup> 75% of the onions come from Afghanistan and 25% from Pakistan. Even though big traders are attempting to enter the other regional markets (Uzbekistan, Tajikistan and Dubai), bilateral agreements and personal relations between Afghanistan and Pakistan facilitate the trade between the two countries (PAJCCI, 2012; Favre, 2005).

### 3 District production and trade in onions

This section first reports on farmers who grow onions but do not trade in them. The second part reports on farmers from two specific villages who produce and trade. The village of Balah Bagh in Sukhrod is the home of a big trader in Jalalabad who provides connections to the market. Mazina in Rodat produces an onion variety that commands a premium market position that has made it possible for some farmers to become traders themselves, trading between the district and provincial capitals such as Jalalabad, Kabul and Peshawar.

#### 3.1 Onion production

The onion-growing farmers interviewed for this study come from six different villages: Masti Khil, Qalai Maroof and Wata Por in Sukhrod and Darab Zala, Merano Kalli, Baba Kalli in Rodat. These farmers grow other crops for household consumption and for the market. None of them trade in onions, instead selling their crop to traders.

Two of the farmers are sharecroppers, paying their landlord in wheat. In Masti Khil, Sukhrod the farmer (#1b) pays his landlord 5000 kg wheat from the 15 jiribs (3 ha) of land he sharecrops. Seven years ago he was growing onions on only 1 jirib (0.2 ha) but then increased the area to 5 jiribs (1 ha) when he reduced the amount of poppy cultivated. In Qualai Maroof, the farmer (#2b), who had been living there since 1980 sharecrops 34 jiribs (6.9 ha) of land and he pays to his landlord 330 kg of wheat per jirib (a total of 11,220 kg). He has been cultivating onions for the last 10-12 years and he gradually started increasing the amount of land dedicated to onions after the opium poppy ban of 2004. Although onions are seen as a cash crop, the farmer (#2b) restricted his cultivation of onions to only 6-7 jiribs (1.2 to 1.4 ha) out of the 34 as onions were not seen to provide a sufficiently reliable source of income to ensure that he could make his payments to the landowner. As he commented:

**Although onions are better than wheat there are two main reasons why we are cultivating only 6-7 jirib [1.2-1.4 ha] land with onions: onions need too much labour and human resources while I am old and my sons are going to school ... and there are risks as well with onions such as diseases and price fluctuation.**

A third relatively large farmer (#4b) in Darab Zala owns 40 jiribs (8 ha) of irrigated land and cultivates onions on half of it. He increased the amount of land dedicated to onions gradually after the poppy ban. He has been growing onions since 1990, but initially they were only for household consumption.

A fourth farmer (#6b) in Baba Kali village had 6 jiribs (1.2 ha) of land and recalled that during the 1970s his father was cultivating only half a jirib with onions. When the family migrated during the Russian occupation the land has been given to a sharecropper who sent half the cash income to Pakistan. This sharecropping cultivated a jirib of onions but when the informant returned he increased the area under onion cultivation to 2-3 jiribs (0.4 to 0.6 ha).

Even though Rodat has not experienced the degree of crop diversification that Sukhrod has, farmers report that they are increasing the land they dedicate to onions every year. This is probably related to the high quality of onions that Mazina village is reputed to produce and which command a premium in the Pakistani and Indian markets.

Access to credit to meet the costs of production appears to be variable. Onion cultivators who live in or have relationships with Balah Bagh in Sukhrod report that they are able to get credit owing to the high concentration of onion production and trader linkages to Jalalabad. In Mazina village farmers can also get access to credit from traders due to the high market value of onions from their specific area. But for other onion cultivators, access to credit may be more difficult and informants often remarked how much easier it was when opium was cultivated. A farmer in Wata Por compared the onion market with opium, remembering that during the 'opium time' it was different because 'the trader was offering credit to me in order to sell opium to him' (#3b). During the opium growing era farmers received fertiliser, wheat and oil from the shopkeepers on credit, but now it is more difficult. As a farmer in Baba Kalli commented:

**Now people are not giving credit to farmers like in the past but it does not mean that credit system or relations are totally finished, nowadays farmers solve their problems through personal connections and relations with shopkeepers, villagers and friends. (#6b)**

In sum, for many farmers the sources of credit for onion have shrunk from the days of opium cultivation and personal relationships play a critical role in getting access to inputs such as fertilisers. But credit can be found.

Costs of production are variable and depend on the way in which farmers decide to sell their crop. The farmer might meet the costs of seed and fertiliser and the labour costs of cultivation and ask the trader to meet the costs of the labour for harvesting and loading the trucks for transportation to market. In all six villages the farmers sell their harvest as a standing crop in the field, leaving the trader to meet the costs of harvesting and loading the trucks. Taking this route leaves the farmer with costs PKR 21,000-22,000 (\$210 to \$220) per jirib. On the other hand, if the farmer is in a position to cover the harvesting and loading costs as well, total costs would rise to about PKR 50,000 (\$500) per jirib. Costs of production appear to be similar in the Sukhrod and Rodat villages at around PKR 40,000-50,000 (\$400 to \$500). However the respondents in Rodat all preferred to limit their investment to PKR 15,000-20,000 (\$150 to \$200) per jirib, leaving the rest of the investment to the trader. This gave them margins of PKR 10,000-15,000 (\$100 to \$150) per jirib. The margins of farmers who also harvested and loaded the crop were potentially greater. However the risks are also greater since the second option means that the trader usually selects the best onions, leaving the second grade ones for the farmer to sell. Under the first option the whole crop is sold.

One advantage of selling the standing crop is that the farmer does not bear the risk of storage and uncertainty of losses caused by waiting for the trucks or not being able to sell. Onions are stored by farmers in a garden or in the shade of a tree and reportedly cannot be kept for more than three days in summer and five in winter. There are no storage rooms in Balah Bagh and the only way to store onions for household consumption for the next year is to spread them on a cloth in a room inside the house, with the likelihood that up to 40% will be damaged (#35). However, onions are still less perishable than other crops (such as tomatoes). Even though the main road from Jalalabad to Sukhrod is paved, the onions have to be carried from the field by donkeys, by daily labourers hired by traders or by the farmers, and then loaded on to trucks.

Women retain the rights to glean the damaged onions left by the buyer after the main crop is harvested and these are gathered by the women and then dried and sold to specialised traders in the market for around PKR 800 (\$8) per seer (one seer is 7 kg). Women in Bihsud dry onions to be kept and consumed during winter in households for whom onions imported from Pakistan are unaffordable (#55). Even though the Mira office of the Ministry of Agriculture, Irrigation and Livestock distributes seeds to women in the district, they are unable to engage in trade as the *purdah* is enforced in daily life, restricting women to the private domain of the house or the neighbouring fields.

Farmers reported a number of sources of information that they can access with respect to price. Sharecroppers take account of the amount of wheat they will have to pay to the landlord at the time of the harvest and the costs of onion production to set the minimum price they will seek from the trader (#1b - #6b). They also ask their family and other villagers about the current prices and will also ask shopkeepers about prices on a specific day in the market in Jalalabad. The frequency with which traders and their representatives visit the fields they have contracted to buy to check on the status of the crop is also an indicator for farmers of the market demand at a specific time. The widespread use of mobile phones has now improved significantly the possibility of accessing price information in markets outside the district, although this does not necessarily mean they have more leverage to negotiate prices with the buyer.

Prices vary depending on the season and demand of different Afghan cities (Kabul, Mazar) and Pakistani centres. However the absence of any standard grading of size and quality make comparisons difficult. In 2013 one jirib of onions could be sold for PKR 80,000 (\$800); it had been PKR 70,000 (\$700) in 2012 and PKR 50,000-60,000 (\$500 to \$600) in 2011. In Rodat farmers set prices according to the average price being asked in Mazina. Considering that the bargaining will reduce prices, farmers try to add PKR 10-15,000 (\$100 to \$150) to the amount they would like to reach.

Certainly 2013 was a very profitable year for the onion market and farmers managed to receive an average price of PKR 75,000 (\$750) per jirib.

### 3.2 District traders – Sukhrod

The district onion traders in Sukhrod mainly come from Balah Bagh village, which is upstream and well irrigated. As well as being involved in the onion trade in the village and district they are farmers themselves and also grow onions. Most of them spent 15 to 20 years in Peshawar during the war where they were employed as wage labourers. One informant (#21), for instance, returned to Balah Bagh after 20 years in Peshawar to cultivate wheat and opium. After the opium ban some local traders in the area suggested he start cultivating onions and vegetables on his 30 jiribs (6 ha). Another informant (#35) belonged to a Sukhrod family owning around 200 jiribs (40 ha) which had been divided equally between four cousins. All of them grow onions, wheat and some vegetables and the informant sharecropped out some of his land for 50% of the crop (#35), making him a landowner as well as a trader.

Consistent with the accounts provided by the producers, these traders identified two ways of purchasing onions from farmers: according to weight or according to area directly from the field. When they buy according to weight using a scale they pay per seer of onions harvested. The second option entails making a forward commitment to buy the onion crop from a given area at a rate per jirib of land. This happens before the harvesting season starts, when the trader or one of his representatives goes to the farmer and negotiates the price. When the price is set and the jiribs are sold the trader organises the transport. When the trader buys by weight, on the other hand, the farmers gather onions from the village and their relatives and are responsible for loading the trucks (#5).

There is direct trading between the villages and the provincial capital, with no intermediate stage in the process. The small traders in Balah Bagh village however reported a preference for dealing with Kabul traders (who deal in AFN), who give them higher levels of credit – AFN 3,000-4,000 (\$52 to \$70) – than the Jalalabad traders (who deal in PKR), who do not give more than 1,500PKR (\$150) credit. Thus the market in Kabul was reported to be more accessible in terms of credit structures than that of Jalalabad. One of the traders said that he sells 80% of the onions he gathers from the district to Kabul because he is offered better prices there, it takes less time to sell, and he is paid back in cash through the *hawala* more quickly than when trading with Jalalabad or Peshawar (#35). Traders in Kabul pay in 10-15 days while in Jalalabad it would take 2-3 months.

However, according to one informant (#21), the majority of traders working in Sukhrod prefer to deal with those who belong to the same area and ideally the same tribe and many trade with Noor Agha, a trader established in Jalalabad who comes from the same district.

Traders see onions as a profitable crop: on average one jirib of onion can be sold at village level in a very good season for PKR 80,000 (\$800) and is more profitable than wheat; as one trader put it: 'After opium, onion is the most valuable vegetable [with which] to make cash' (#21). Informant #35 suggested that Sukhrod district exports 1,500 to 2,000 tons of onions per day in the harvest period. As with the producers, the absence of storage facilities means that the traders have to sell quickly at the going rate in Kabul. He sells one bag (100 kg) for PKR 3,000 (\$30), whereas he would double his profit if he could store onions and sell them when demand was highest.

Informant #21 was working at a smaller level, buying onions from farmers and then selling them to big traders coming from Jalalabad with their trucks. Two or three years ago he decided to sell only his own production as the risk and the economic investment of trading were not bearable given the small volumes and the impossibility of accessing credit for investment. He says: 'It is a bit risky to buy and sell other farmers' onions because this needs more money and there is also a chance of loss due to a rapid decline in price' (#21).

### 3.3 District traders – Rodat

The three onion traders that were interviewed in Rodat also sold mainly to Kabul, Peshawar and Mazar, trading only rarely with Jalalabad (#14). One of them (#8) is a seasonal trader, about 30 years old who has never left Afghanistan and has been trading onions for the last ten years. He trades onions from the

districts in the harvesting season and combines this with trading in cars when harvesting is over. The second informant (#14) has worked as a trader in onions for the last 17 years. He was a farmer in Rodat before migrating to Pakistan where he did some wage labour and then got into the onion business. He trades onions from the districts to Kabul, Mazar and Peshawar. He works with a partner – also from Mazina – and says that being in Mazina village makes the volume of the trade high since the onions are of very high quality and exportable to Pakistan and India.

The third trader (#22) owns a total of 15 jiribs (3 ha) of land in Mazina which he sharecrops out. He returned to Afghanistan after the ‘holy jihad’ and started doing business with onions because it is ‘good business’. He buys onions from districts in Baghlan, Parwan and Logar. On his land he farms seven jiribs (1.4 ha) with onions and eight jiribs (1.6 ha) with other crops, mostly vegetables. He says he belongs to ‘a very well known family’ and has relationships of trust with farmers and traders in Kabul and Peshawar. He exports onions to Pakistan and imports potatoes from Lahore, Islamabad and Peshawar.

All three of these Rodat traders have a trading network with Peshawar and they describe Jalalabad as a transit place: ‘Most of the time the traders of onions and other commodities are Pashtuns and they are having good relations with the traders in Peshawar. This also makes the trading easier with the Pashtun traders in Peshawar and Kabul’ (#8). Informant #14 exports onions and other crops from Logar, Mazar and Baghlan. When the season starts in Rodat (June-July) he will start exporting onions to Peshawar and from Peshawar to other markets in Pakistan, although rarely to Rawalpindi since there are some Pakistani traders covering that area. Exports continue until December, after which he imports onions from Peshawar to Jalalabad and Kabul until March.

The basis of price setting reported by these traders was consistent with the reports of other traders. They assess current prices at the provincial market and through informal networks of shopkeepers and other traders.

As in Sukhrod, the traders buy onions either per bag (weighed by the kilo or seer) or in advance per jirib, in which this case the wage labour for loading the trucks is the responsibility of the trader. Daily labourers who have specific skills in sealing the sacks cost up to AFN 500 (\$8.77) per day. When the traders buy from the field they can hire a truck from a contracting company. The transport costs are PKR 17,000 (\$170) per truck and the trucking company is responsible for any damage or loss to the onions. The capacity of a truck is usually higher than an individual farmers’ harvest, so the onion crop has to be collected from several farmers and this can take time. Security can also be a risk as some traders gathering commodities from farmers have been robbed (as recently happened in Baghlan – #22). This risk keeps the traders close to the routes and the networks they know, trading only with those they trust. During the harvesting season, each three days trader #14 sends a 22-wheel truck with 350 sacks (124 kg each, or 43 tons in total) to Peshawar. When he sells to Kabul he uses a six-wheel truck loaded with 350 to 380 small bags of about 27 to 30 kg each.

These traders also had much to say about the costs of getting the onions to markets beyond the district and province. Getting the onions from the field is not a huge cost and the major costs comes from the border and illegal taxation: ‘When traders want to export onions to Pakistan, in this case they have to pay taxes and illegal money on the way to Peshawar. In the same way when they import onions and other commodities from Pakistan they have to pay taxes to Pakistan government, a lot of money to the gangsters and police checks on the way to Torkham ... and this causes increments in the prices of all commodities, including onions’ (#14).

On top of the cost of the transport between Jalalabad and Peshawar (PKR 60,000 or \$600), traders pay between PKR 2,500 (\$25) and PKR 3,900 (\$39) to the Pakistani government for each ton of onions (#10b, #11b and #12b). Then there are about 26 check posts between Torkham on the Afghanistan border and Peshawar that demand informal taxes, each of which will cost the trader about PKR 1,000 (\$10). At Peshawar market the trader has to add to these expenses the 5% that goes to the big Punjabi traders (the *Arati*) selling on commission. The same process happens when importing from Pakistan to Afghanistan where the Afghan government asks about for the equivalent of PKR 43,000 to 63,000 (\$430 to \$630) for a truck (#14). Traders coming into Afghanistan also have to pay illicit fees: they pay

at the Laghman junction and when going to Kabul the trucks might be stopped by the police asking for informal taxes at the entrance of the city.

The unpredictability of market prices is a major issue that the district traders face. The lack of information on market prices and the absence of storage rooms forces a small trader to sell the onions right after harvesting as they cannot be kept for more than a few days. Trader #22 reports instances of having sent a loaded truck to market in Kabul or Peshawar after checking the prices via telephone with local shopkeepers, and then helplessly watching the price drop as another load came to market at the same time. This suggests that there is collusion in the main markets, a phenomenon that has been observed in other commodity markets in Afghanistan (Lister et al., 2004).

The whole trading process exists on credit, from buying at the field to selling at the market to trading across borders. As one informant put it: 'We do not use our own money to run this business, we deal with traders' money and farmers' crops' (#22). Small traders dealing with farmers at the district level receive money from traders in Kabul or Peshawar four to five days after they have sold the onions. If a trade goes wrong and the small trader does not make a profit he still has to pay the farmer in order to keep the farmer loyal. The trader who described this situation (#8) reported that he had bought a car on loan and then sold it for cash to pay the farmers. He then risked paying the loan back the following season, hoping the market would give him a better profit with the onions and vegetable trade.

Credit relations are described in terms of trust (#14). Traders 'need to have trust to buy commodities, especially onions, which is something not affordable for a small trader, therefore they build trust and they do business in credit in Peshawar and Kabul and sometimes even in Mazar'. It is a matter of reputation and trust that makes it feasible for a small trader in Mazina (#22) or the nearby village of Chaprihar to buy onions without paying a single penny to the farmers and at the same time to have money on credit from the traders in Peshawar: 'They send me one million rupee [\$10,000] without hesitation'.

On the trading relations with Afghan traders in Peshawar, trader #22 stated that they are small traders while the big traders (*Arati*) are Punjabi and a few are Peshawar Pashtuns. All the cross-border trade with Afghanistan is handled by Afghans in Peshawar because the Pakistani traders see it as too risky. Trader #22 does business on credit through a trader from Logar based in Peshawar. As he says, traders working at district level do not touch money as the money comes from the Pakistan (80% of his business is with Peshawar) and that is why they work with Kabul and Peshawar – trading with Jalalabad is almost always in cash.

In summary, what emerges from this discussion of onion production and trade at the district level is of an extremely complex trading system with a number of key attributes. First, it is a trading system that deals in a relatively high value but perishable product; the value of the product combined with the lack of storage facilities means that trading on quickly – whatever the price – is essential to minimise potential losses. Second, the trade largely operates on informal credit underpinned by relationships of trust based on close personal networks built on reputation and frequent interaction. Third, there is widespread knowledge of prices among both farmers and traders but there is also considerable price instability, making this a risky enterprise. Fourth, it is clear that many of those involved in onion production and trading seek to avoid engaging in their provincial market in Jalalabad; the discussion now turns to explore why this is so.



## 4 The Jalalabad onion traders

While some of Nangarhar's onion crop goes directly to Kabul or Peshawar, as we have seen, a significant part passes through the hands of the Jalalabad onion traders, and their role in regulating prices and returns is considerable.

### 4.1 The Jalalabad onion market: The physical manifestation of market power

In 2004 around 70 vegetable and horticultural traders were reported to be active in Jalalabad city (Favre, 2005). By 2011 that number had grown to 160 (Giovacchini, 2013). Of these, there are 35-40 traders with vegetables shops within the *sabji mandi* and 24 of these – all onion sellers – were interviewed for this study. The majority of traders in vegetables and especially onions are Pashtun or Tajik from Sukhrod, Kabul, or Khogyani in Laghman province, and a minority are from the Arab tribe who are reported to be the elite in the trading sector<sup>4</sup>. The *sabji mandi* or vegetable market moved to its current location after the period of Taliban rule, reconstructed with funding from USAID in 2004-2005.

From the accounts provided by the major traders in the Jalalabad vegetable market, it is estimated that there are about 300 seasonal traders in the onion market who work on the margins of the *sabji mandi*. They provide the link between the farmers in the districts and the main onion traders in the provincial capital. They may also trade directly in their own right with other markets in Kabul and Peshawar. About a further 30 traders sell onions outside the *sabji mandi* as street vendors or with temporary stalls. One of the main issues for the Jalalabad vegetable and fruit market is that a planned industrial park with cool storage facilities has never been built (Giovacchini, 2013). This is one of the reasons behind the counter-seasonal traffic of agricultural products between Afghanistan and Pakistan.

To the observer there is a striking contrast between the physical construction of the vegetable markets in Peshawar and Jalalabad. In the former there appears to be a relatively egalitarian allocation of space between traders, with a square perimeter, and three sections dedicated to fruit and vegetables – one specifically to onions and potatoes. In contrast, the *sabji mandi* in Jalalabad (see map attached as Annex II) has a rather different allocation of space. It is composed of two blocks, one of them occupied by the fruit and vegetable traders and their shops. There is a second block, right across the road that oversees the first. This belongs to Haji Gul Murad and his employees. It says much about the distribution of power within the market. Haji Gul Murad received the contract from the municipality to oversee the *sabji mandi* and it operates subject to his authority and decisions (discussed further below). He pays a lease to the municipality and collects duty as a representative of the government applying a fee on each commodity or product entering or leaving the market through his representatives. He is also the person through whom international trading licences can be obtained, as he works as the key broker, thanks to the informal networks of relationships he established during Sherzai's governorship (2004-2013) with the Afghanistan Chamber of Commerce and Industry.

### 4.2 Who are the onion traders?

As with all markets a distinction can be made between the big, middle-sized and small traders, based on their level of capitalisation, trading partners, trading volumes, and the range of goods they trade in.

The big traders in the *sabji mandi* in Jalalabad dealing with onions usually also trade in other vegetables such as potatoes, tomatoes and garlic. There are four such big traders in the *sabji mandi* who reported an average annual trade of over 15,000 tons (imports and exports), of whom Haji Gul Murad is probably the largest. They trade with the markets of Pakistan, India, Tajikistan and Uzbekistan, and according to the accounts we received from two of them (#28, #12b) the annual imports and exports can reach

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<sup>4</sup> Cf. (Barfield, 2010: 29-30) for an introduction on Afghan tribes and their geographic and economic scope: "The Arabs of Afghanistan claim descent from the Arabian armies that conquered central Asia in the eighth century [...]. They have tradition of pastoralism, yet one that is well integrated into market production."

18,000 tons. All these big traders had periods of exile in Pakistan during the 1980s which they used to build their commercial connections.

While precise figures are not available, the big four traders are likely to account for the greater proportion of the onion trade and have been its key players for a decade. There do not appear to have been any new entrants into this upper layer of traders in that time. The reasons may be related to the role of social relationships, informal networks and informal credit in providing market access. Equally significant is the influence that the big traders have in regulating cross-border costs to their advantage (discussed in the final section).

Trader H.Y. (#27) is described by the other traders as the second biggest trader in the Jalalabad market after Haji Gul Murad. He started his career as a boy selling onions and potatoes for his father and Haji Gul Murad used to be his junior. He has been working in this sector for the last 47 years and now has nearly 30 of his relations involved in the trade of onions, potato, tomatoes and garlic. During the onion season he buys and sells 50-100 tons daily. However during the 2013 season – when the business boomed due to a crop failure in India after a season of heavy monsoons and floods – he reported that he dealt with 3,000 tons a day. From November to February he sells onions to Kabul, Kunduz, Baghlan, Mazar, Sheberghan, Logar and Gardez. From April to October he works with Nangarhar and Laghman, Baghlan, Bamyān (where he mostly buys potatoes) and Wardak. A quarter of the onions he trades come from Pakistan and three-quarters are purchased inside Afghanistan.

Another big trader is H.S.G. (#28, #12b), who has been trading in agricultural products since 1973. He followed his father into the business and continued after migrating to Pakistan at the time of the Russian invasion while also fighting for the ‘holy jihad’. He returned to Afghanistan after 2001 and now sells hundreds of metric tons per month and has around 50 labourers loading and unloading the trucks arriving at his lot at the market: ‘last year we exported 200,000 tons to Pakistan and we imported 5,000 tons back to Afghanistan’.<sup>5</sup>

He describes Nangarhar as having a critical role in the trade between Afghanistan and Pakistan as he says that 50% of his business focuses on Jalalabad, 25% on Kabul and 25% on Pakistan. He reported having counterparts working for him in Kabul and Peshawar controlling the market: ‘this business is not a one-person business’. His network gives him access to information on prices in both cities so he can assess which market will be more profitable. He has been trying to reach new markets in the region and noted the constraints he faces as a result of his economic and logistical dependency on Pakistani traders.<sup>6</sup>

The fourth large trader is H.S. (#1). He graduated in 1974 from high school and worked as a teacher in Kunduz province until 1978. He was then in Pakistan during the Russian occupation. While fighting as a jihadi he started a business in Peshawar, selling and buying vegetables. When the Russians left Afghanistan he returned to Nangarhar and continued with the vegetable trade. When the harvesting season starts in Nangarhar he buys onions from Mazina village and exports them to Pakistan. He exports onions from Kabul and Logar to Pakistan until December and then imports them from Pakistan until April.

He stressed the role of Jalalabad as a cross-border city where stock passing through is stored before continuing to the final destination. As onions from Mazar arrive, for example, a percentage is sold to the local market in Jalalabad and the balance continues to Pakistan. In the same way, when traders bring onions from Pakistan they store and sell a certain part on the market in Jalalabad and the rest reaches the wholesale markets of other Afghan cities.

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<sup>5</sup> He buys onions and potatoes from Peshawar and Lahore that he then trades with Dubai, from October till January. The remaining eight months he deals with domestic onions coming from the districts. Following the season cycle he purchases onions from Sukhrod in April, from Laghman in late April and May, and from Kama, Khogyani and Goshta districts in the following months. Then he buys onions from Mazina village in Rodat district (the two varieties, ‘cold’ and ‘warm’, are well-known on the Pakistani market).

<sup>6</sup> As an example of this dynamic he tells the story of when two years ago he sent a cargo of onions to Dubai: ‘It took more than two weeks for 38 tons of onion to reach Dubai and the cargo was half damaged by the time it was on the market’. The reason behind this failure was that trading with Dubai or India is possible for Afghans only through the mediation of Pakistani traders and this slows down the process, causing losses and decreasing the margins for Afghans.

In contrast to these big traders, the medium-sized traders have an average annual turnover in imports and exports of 700 tons (#10b). The small traders who are the most numerous in the marketplace do not import or export. They sell at the district level with bags of onions bought, usually on credit, from Jalalabad market.

### 4.3 Trade, prices and risks

The onion trade is subject to considerable price fluctuations. The price of onions was reported to fluctuate on a daily basis in Pakistan and this has a strong impact on the market in Nangarhar as for four months they import onions from the Punjab and Sindh. Traders therefore claim they operate according to international demand and price setting on these markets. Levels of production in other parts of Afghanistan also influence the prices in Nangarhar, particularly the production coming from Kandahar or Kabul. However the levels of daily fluctuation also suggest a degree of market collusion by the bigger traders in fixing prices, as described by trader #22 in section 3.3 above.

Traders (#1, #28) reported that they have two choices as to where to sell their onions. They usually compare the price of the internal national market (Kabul) with the prices in Pakistan (Peshawar). A profit margin of 5% to 15% is considered acceptable. Currently, a price of more than PKR 300 (\$3) per bag is likely to make it worthwhile to enter the market with its attendant costs and risks, including transportation losses. So, if the prices are down in Kabul and Nangarhar, Jalalabad traders sell to Pakistan. There is little evidence therefore that traders lack price information, which appears to be communicated efficiently. It is also clear, though, that prices can change very rapidly.

According to various sources (#10b to #12b) the costs and margins on transporting a truck of onions to Peshawar for Jalalabad traders can be broken down as follows:

- Per truck taxation in Pakistan: PKR 125,000 (\$1,250)
- Transport costs: PKR 60,000 (\$600)
- Loading and informal taxes: PKR 15,000 (\$150)
- Total costs: PKR 200,000 (\$2,000) per truck to reach Peshawar from Jalalabad (50 tons, 22 wheels).<sup>7</sup>

Trade largely depends on informal credit. Traders are the main source of credit for the producers of onions but this credit carries risks requiring economic or social capital to cover for possible losses in the returns. As one trader puts it: 'you will never see a rich vegetable trader as the business is too risky' although the evidence does not entirely support that view. A second informant has this to say about dealing with a district trader:

**When we sell it on credit, sometimes it is hard to get your money back along with the margin. Last year a person who was working with me took onions for AFN 90,000 [\$1,578]. He left his business and joined the police, and when he went to Shirzad district he unfortunately got killed and now it is hard for me to get my money from his family as they are poor and they do not pay. Such cases happen in vegetable and fruit business (#31).**

However both cross-border trade and internal regional trade are usually based on long-established relations of trust. The market functions on trust without cash exchange at the point of agreement: a trader in Jalalabad and a trader in Peshawar know that once the products are sold on the Pakistani market the seller will just retain his commission (between 2% and 5%) and transfer the balance. Money will be transferred through banks or more commonly through the *hawala* which charges a percentage for commission (usually 0.4% to 0.5% of the total amount) and payments can be received in a matter of hours. For example, on a PKR 100,000 (\$1,000) transfer a commission of PKR 400-500 (\$4 to \$5) can be paid.

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<sup>7</sup> An acceptable profit would be PKR 15,000-20,000 (\$150 to \$200) per truck, but the margin could be much higher in a good season.

#### 4.4 Networks and social relations: The foundation of market exchange

Economic relations between Jalalabad and Peshawar are facilitated (and regulated) by language, ethnicity, and communal history. Reflecting the views of many of the informants, one trader said:

**People from Jalalabad have more relations on both sides because at the time of migration they were in Peshawar and they understand the techniques on both sides ... Plus, they speak pashto at both sides of the border. (#1)**

Although ethnicity is one dimension of these trading systems, more important are family relations and cross-border networks of relatives. A trading house is largely made up of family members. Thus for the Afghans in Peshawar working in the onion trade, family links are the means to access the market. The life histories of ten Afghan traders working in the onion market and established in Peshawar showed that their first links to the Peshawar market came through family ties. To give one example, a trader working in the fruit and vegetable market of Peshawar said he had followed his uncle and his father into the business, while his brother was working in the border customs facilitating the interests of the family (#25).

In sum, the onion market does not operate on the basis of impersonal relations where access to information and credit are the key constraints. Rather, social relations and networks are fundamental to market engagement and the means by which information and credit is accessed. Family networks are the basis of this. By the same token, those in a stronger market position, as determined by social and political position, are able to control prices and access to the market.

#### 4.5 Social regulation and exclusionary practices

One line of evidence about how social relations regulate the market comes from the farmers in Sukhrod who report that Jalalabad traders set the prices and force them to sell onions at a low price. Since farmers may be dependent on credit (#7) or have already accepted advance payments on the crop, they are not in a position to negotiate. Some sell the onions directly to the market, but the price can fluctuate considerably even within a day.

For a small trader from Sukhrod who wants to access the provincial markets, Kabul market is more accessible than Jalalabad as the big Kabul traders pay on the same day or within a week, while in Jalalabad this rarely happens. Moreover Jalalabad market is described as a monopoly where a small trader from the district cannot negotiate prices: 'another reason to prefer to sell onions at Kabul market is that in Jalalabad there is a group of 15-20 traders controlling prices and there is no competition. A small trader from the district can't negotiate prices in Jalalabad market' (#21). None of the Rodat traders reported selling onions to Jalalabad, selling instead to Kabul, Peshawar and Mazar (#14).

Traders in Jalalabad market (#27) in their turn expressed their need to control the small-scale trading happening at district level. For this reason there is the widespread tendency not to sell larger volumes to small traders, which could potentially create a competitive market.

Within the wholesale market there are around 50 traders in Jalalabad who are members of an *Ittihadia* (traders' association or union). The members pay an annual fee and the association represents them at the governors' councils and at the Nangarhar and Kabul meetings of the Chamber of Commerce and Industry. Being part of the association also ensures that they will be represented by the head of the organisation during international meetings with potential partners in Pakistan, India and Dubai and that the interest of the group will be considered while stipulating formal and informal agreements.

The head of the *Ittihadia* is H.Y. and H.S.G. is the deputy. Relations with the Chamber of Commerce in Kabul and the regulation of exports to the neighbouring countries fall under the supervision of Haji Gul Murad. The *Ittihadia* is one way in which the larger traders ensure their interests are met. However it is over the role of taxation at the Torkham border that informal interests and influence are most apparent.

A critical issue for traders doing business in Pakistani or Indian markets is the formal and informal taxation at Torkham border. The Pakistan government charges PKR 2,500 (\$25) per ton of onions in

import tax and the Afghan government charges AFN 60,000 (\$1,052) per truck importing onions, which is equal to PKR 2,845 (\$28.45) per ton. Traders are allowed to load a maximum of 39 tons, but they usually load up to 50 tons to decrease the tax they pay (which effectively falls to PKR 2,200 or \$22 per ton). Even though the extra load seems to be damaging the roads, under the rule of former Governor Sherzai the border police allowed the extra weight in return for a commission. This system seems to have benefited some traders but not others. As one informant puts it:

**He (Sherzai) was not an honest man, he was taking per vegetable truck PKR 8,500 (\$85), every day hundreds of thousands [sic] of vehicles were passing through Torkham and millions were going to his pockets and not to the state. (#32)<sup>8</sup>**

However with the appointment of the new governor Ludin in October 2013, the tip to the border police has increased to PKR 35,000 (\$350) and the truck drivers are asked to unload the truck in case of extra weight. The Torkham border police's practice of unloading trucks containing agricultural products has caused consistent losses to the traders and is seen as way to extract additional payments.

The gossip amongst the traders and reported to us by an informant (#32) was that Sherzai's influence on the border police allowed traders to pay less in tax while the new governor Ludin has increased the bribe. Some respondents claim that they now pay 10 times more: around PKR 100,000 (\$1,000) (for a 10-wheel truck) in comparison to the PKR 10,000 (\$100) they were paying before. Some of them also claim that the *Kantha* (weighbridge issue) is pushing traders to allow the transport of illegal commodities.

#### **4.6 The *Kantha* issue**

Sherzai's relations with traders, in which Haji Gul Murad had a key negotiating role, ensured the interests of the well-connected traders were met. On 12 December 2013 the newly appointed governor Ludin invited Jalalabad traders to the Nangarhar Chamber of Commerce and Industry (NCCI) office to discuss matters including the informal taxation practices at Torkham border and the *Kantha* issues. The new governor has introduced an anti-corruption measure by banning the use of the unofficial *Kantha* situated two kilometres from the Torkham border. The ban of the use of the unofficial *Kantha* means that traders are now obliged to weigh trucks on the official truck scale placed at the very edge of the border. The change has had a major impact on the big Jalalabad traders' costs. The anticorruption operation has been very unpopular with the trader elite, with some saying that Ludin is not used to this type of business and does not understand how it works (#30).

During the meeting four factions of traders could be identified: one led by Haji Gul Murad, affiliated with Sherzai; one led by H.F., also affiliated with Sherzai; one led by H.A. who has no political connections; and a fourth group without any apparent political link. One informant (#34) said that one outcome of the meeting was that the use of the official *Kantha* or weighing of lorries was stopped – for only two weeks – but this was only known by a select group of traders. This enabled H.F. and his group to trade across the border during those two weeks and reach Karachi at lower cost, highlighting how information is managed by a very close elite group. The traders' associations and the NCCI apparently colluded with the Afghanistan Chamber of Commerce and Industry to regulate access to cross-border trade and ensure that certain traders pay less tax. The social network controlling this process is still linked to Sherzai, but the key traders – H.F. and Murad – have managed to retain their influence under the current governor. Representatives of NCCI management openly described the "weighing issue" at Torkham and the reaction of the traders elite to Ludin's measures as a negotiating ploy to restore the collusion over an informal system of taxation (#19).

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<sup>8</sup> The informant refers to a specific informal tax in place under Sherzai: the so-called *Bazsazi* (reconstruction) was applied to each truck entering Afghanistan at Torkham border and it could fluctuate between PKR 2,000 (\$20) and PKR 8,500 (\$85).

## 5 Discussion

The journey of an onion from [the] field to the end customer...takes only a few days but it is enough to make you weep. There are some underlying reasons why prices have risen – higher rural wages have pushed up farmers' costs. But the system is horribly fiddly. Farms are tiny with no economies of scale. The supply chain involves up to five middlemen. The onion is loaded, sorted or repacked at least four times. Wastage rates, either from damage or weight loss as onions dry out, are a third or more. Because [there] is no modern food-processing industry, low-quality onions that could be turned into paste or sauces are thrown away. Retail prices are about double what farmers receive, although the lack of any standard grading of size or quality make comparisons hard. The system is volatile as well as inefficient. Traders who buy onions from farmers may hoard them, but for the supply chain as a whole far too little inventory is stored. As a result small variations in demand and supply are amplified and cause violent swings in price. (*The Economist*, 14 December 2013)

This account of the journey of an Indian onion from production to consumption could well have been written to describe the Nangarhar onion value chain. It also fits well with the perspective of the recent Agricultural Sector Review (ASR) for Afghanistan (World Bank, 2014) and its ambitions to promote horticultural value chains in areas of potential high growth in Afghanistan. *The Economist* bemoans the value chain's inefficiencies, arguing for investment by supermarket chains and big food producers to cut layers out of the supply chain, build modern storage facilities and encourage farmers to consolidate their plots. The Afghanistan ASR would probably share this view of what needs to be done.

The Indian onion story points to the fact that some of the challenges that the onion market faces are not unique to Afghanistan. Further, given that the Afghanistan onion export market is subject to the Pakistani and Indian onion trades and their principle actors, realism is needed about the extent to which seeking to build value chain efficiencies for the onion value chain in Afghanistan would circumvent the structural obstacles of onion trade in the region.

Note should also be made of *The Economist's* concerns over higher rural wages: rural wages have doubled in three years and the article quotes a rich Indian onion farmer (owning 6 ha, which is five times the Indian national average farm size) complaining that workers have become lazy. The rise in rural labour wages in Asia has been more widely noted (Wiggins and Keats, 2014) but it is driven by a tightening of labour supply caused by declining fertility rates and rising urban demand for labour for manufacturing. Neither of those drivers is currently at play in Afghanistan, although rising rural wages would have significant income poverty effects. Equally it is clear that value-chain modernisation effects would lead to economies of scale in production and consequently land consolidation. Growing farm sizes would push smaller farmers out of agriculture. Market-driven agriculture has consequences for land ownership patterns, but neither this nor the need for rising rural wage labour rates is discussed in the ASR report.

A key aspect of the description of the onion trade in India that resonates strongly with the evidence from Nangarhar in this paper is risk. There are two interrelated dimensions to this. The first is that onions are highly perishable and have a short storage time under natural conditions. Without appropriate cool storage, losses of up to 40% of harvest occur both in Nangarhar and India (*The Economist*, 2013). The lack of buffer stock to handle short-term fluctuations in supply and demand leads to rapid fluctuations in price, as again was found in both Nangarhar and India – 'prices vary wildly day by day' (ibid: 2). Such fluctuations are also clearly compounded by trader collusion over prices and short-term hoarding. There is, as *The Economist* suggests, a solution to this and that is better cold storage. But there is a catch related both to the cost of such storage (and its effects on prices) and more critically the fact that such storage is seen to destroy the full flavour of the onion, a critical aspect of its culinary value.

The second resonant aspect of the Indian onion story is the question of how the risky onion market is handled by those engaged in it. The simple answer is through informal networks of trust, based around the provision of informal credit. Running through all the accounts of traders is an emphasis on trust: traders 'need to have trust to buy commodities, especially onions ... therefore they must build trust' (#14); and 'he belongs to a very well-known family and has good trust with both farmers and with

traders' (#22). This trust does not depend on material possessions but on relations; as Muldrew (1998: 148), writing of credit in 16th century England, puts it: 'credit in social terms – the reputation for fair and honest dealing of a household and its members – becomes the currency of lending and borrowing'. Thus creditworthiness is defined in the terms of the ability to raise money from others at short notice or knowing where to find the money (Kjiln and Pain, 2007). More generally as Thompson (2011) puts it in her analysis of the *Hawala* system in Afghanistan, 'trust is the coin of the realm' and it works within an ethic of forgiveness and discretion, characteristic of dispute resolution at the village level (Gang, 2010)

The ASR (World Bank, 2014: xv) sees the lack of formal credit for market-oriented agricultural expansion as a constraint, particularly for investment in production activities. Credit through formal financial institutions is indeed limited but this does not mean, as the ASR assumes, that credit is absent. In contrast to the assumption that market expansion necessarily depends on more formal credit, the evidence here suggests that it may depend on the creation of more extensive interpersonal relations, just as Muldrew found in 16th century England. Formal credit and its associated institutional arrangements may therefore be an outcome of the growth of informal credit relations rather than the means by which credit supply grows (Tilley, 2005). Formal credit mechanisms may also sit uneasily with existing credit practices based on trust rather than contract, and on reputation rather than collateral, and may well not generate the agricultural transformation that is hoped for.

## 6 Conclusion

We read in Geertz's analysis of *bazaar* networking patterns in Morocco of the importance of knowing, information and misinformation to understanding how social reproduction works in the marketplace (1978: 29): 'These ignorances mentioned above are known ignorances, not simply matters concerning which information is lacking. Bazaar participants realize the difficulty in knowing if a cow is sound or its price right, and they realize also that it is impossible to prosper without knowing. The search for information one lacks and the protection of information one has is the name of the game.'

As this paper makes very clear, information on prices is widely available within the onion markets of Nangarhar and both traders and producers have ready access to it. However, given the significance of informal credit in trading relations – between producers and traders and between traders of different sizes – it is the informal relationships that are critical to market exchange.

While the ASR (World Bank, 2014) sees potential in Nangarhar's well-irrigated fields and good market access, the evidence shows that farmers in the flat, well-irrigated peri urban areas such as Sukhrod encounter exclusionary practices by traders ruling the vegetable and fruit market at the provincial centre. Resources and rents in the marketplace are captured by a trading elite represented by the same small, connected group of actors encountered in the 'political marketplace' of Nangarhar under Sherzai's governorship (Jackson, 2014).

There is some evidence that indicates that forms of risk taking and strategic agency do take place in those niches where onion production is particularly favourable (based on variety, quality and quantity). In Mazina village, traders were found who had established connections with Peshawar and Kabul in order to escape the control of the Jalalabad elite. Balah Bagh village also provides examples of producers and traders trying to find better trading options than the unequal returns of the market in Jalalabad.

The extent to which such actions can be supported to bring about more substantive change in market governance at provincial or district level remains unclear. The literature from the region suggests that collective action can be effective in lobbying for specific changes in policies (see for example Coles and Mitchell, 2011: 221). But the collective body representing craftsmen, retailers and traders in Nangarhar – the Directorate of Craftsman and Traders – is still embedded in the social networks that support the social reproduction of the political arena. The traders' *Ittihadia* in Jalalabad exists as a means for the elite traders to maintain control on imports and exports, volumes and prices. It negotiates agreements with the Afghan Chamber of Commerce and Industry, allowing it leverage with the provincial governor to negotiate issues relating to border taxation and to keep district-level traders working in a disadvantaged position with respect to market access, costs and returns.

It is not, therefore, as CARD-F has assumed, simply access to credit and market information that constrains the growth of agricultural commodity markets. Nor are the arguments of the ASR (World Bank, 2014) with respect to the lack of credit supported by the evidence presented in this paper. Assumptions of how markets should work provide a very poor understanding of how they actually work and the critical and diverse roles of social relationships, power and trust in structuring economic relationships (see also Pain and Mallet, 2014).

What might this mean from a policy perspective, given the limited capability of external interventions to displace or reorder existing political and social relationships? What is clear is that the will to drive economic transformation is not just a technical matter that can be reduced to policies, plans and technical interventions. As Booth and Unsworth (2014) suggest, carefully crafted context-specific interventions that engage in specific markets in particular locations are needed instead.

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# Annex

N/S	Date of Interview	Gender	Profession	Province	District
1	2013-12-21	Male	Onion/Potato Trader	Nangarhar	Jalalabad
2	2013-12-22	Male	Onion/Potato Trader	Nangarhar	Jalalabad
3	2013-12-22	Male	Onion/Potato Trader	Nangarhar	Jalalabad
4	2013-12-23	Male	Fruit and Vegetable Trader	Nangarhar	Jalalabad
5	2013-12-23	Male	Fruit and Vegetable Trader	Nangarhar	Jalalabad
6	2013-12-24	Male	Onion/Potato Trader	Nangarhar	Jalalabad
7	2013-12-25	Male	Onion/Potato Trader	Nangarhar	Surkhrod
8	2013-12-26	Male	Onion/Potato Trader	Nangarhar	Rodat
9	2013-12-29	Male	Onion/Potato Trader	KPK (Khyber Pakhtoonkhawa)	Peshawar
10	2013-12-29	Male	Onion/Potato Trader	KPK (Khyber Pakhtoonkhawa)	Peshawar
11	2013-12-30	Male	Onion/Potato Trader	KPK (Khyber Pakhtoonkhawa)	Peshawar
12	2013-12-30	Male	Onion/Potato Trader	KPK (Khyber Pakhtoonkhawa)	Peshawar
13	2014-01-04	Male	Onion/Potato Trader	Nangarhar	Surkhrod
14	2014-01-04	Male	Onion Trader	Nangarhar	Rodat
15	2014-01-07	Male	Onion Trader/Farmer	Nangarhar	Dari Noor
16	2014-01-07	Male	Onion Trader/Farmer	Nangarhar	Dari Noor
17	2014-01-08	Male	Onion Trader/Farmer	Nangarhar	Dari Noor
18	2014-01-09	Male	Fruit Trader and Fruits and Vegetable Union Spokesman	Nangarhar	Jalalabad
19	2013-12-22	Male	Trader	Nangarhar	Jalalabad
20	2013-12-24	Male	Trader	Nangarhar	Jalalabad
21	2013-12-25	Male	Trader	Nangarhar	Surkhrod
22	2013-12-26	Male	Trader	Nangarhar	Rodat
23	2013-12-29	Male	Trader	KPK (Khyber Pakhtoonkhawa)	Peshawar
24	2013-12-29	Male	Trader	KPK (Khyber Pakhtoonkhawa)	Peshawar
25	2013-12-30	Male	Trader	KPK (Khyber Pakhtoonkhawa)	Peshawar

26	2013-12-30	Male	Trader	KPK (Khyber Pakhtoonkhawa)	Peshawar
27	2013-12-21	Male	Onion Trader	Nangarhar	Jalalabad
28	2013-12-22	Male	Onion Trader	Nangarhar	Jalalabad
29	2013-12-22	Male	Onion Trader	Nangarhar	Jalalabad
30	2013-12-23	Male	Vegetable Trader	Nangarhar	Jalalabad
31	2013-12-23	Male	Fruit Trader	Nangarhar	Jalalabad
32	2013-12-24	Male	Onion Trader	Nangarhar	Jalalabad
33	2013-12-24	Male	Onion Trader	Nangarhar	Jalalabad
34	2013-12-30	Male	Executive Director Chamber of Commerce	Nangarhar	Jalalabad
35	2013-12-25	Male	Farmers	Nangarhar	Surkhrod
36	2014-01-04	Male	Onion Trader - District to Vegetable market	Nangarhar	Surkhrod
37	N/A				
38	2014-01-04	Male	Onion Trader	Nangarhar	Rodat
39	2014-01-04	Male	Onion and Vegetable Trader	Nangarhar	Rodat
40	2014-01-06	Male	Onion Trader - District to Vegetable Market	Nangarhar	Dari Noor
41	2014-01-07	Male	Onion and Potato Trader - District to Market	Nangarhar	Dari Noor
42	2013-12-19	Female	Director of Rohafza Jam and Pickles Factory	Nangarhar	Jalalabad
43	2013-12-22	Female	House Wife	Nangarhar	Jalalabad
44	2013-12-23	Male	Head of Brishna	Nangarhar	Jalalabad
45	2013-12-24	Female	Head of Handicraft Company	Nangarhar	Jalalabad
46	2013-12-19	Female	Trader/ producer of jam/preserve and pickle sauces	Nangarhar	Jalalabad
47	2013-12-25	Female	Field Officer Department of Agriculture, Irrigation and Livestock (DAIL)	Nangarhar	Bihsood
48	2013-12-26	Female	Farmer wife	Nangarhar	Bihsood
49	2013-12-26	Female	Farmer wife	Nangarhar	Bihsood
50	2013-12-26	Female	Farmer wife	Nangarhar	Bihsood
51	2013-12-21	Male	Director of Revenue at Municipality Department	Nangarhar	Jalalabad
52	2013-12-21	Male	Head of directorate	Nangarhar	Jalalabad
53	2013-12-23	Female	Head of the DoWA in	Nangarhar	Jalalabad

			Nangarhar Province		
54	2013-12-22	Female	Economic Director at DoWA	Nangarhar	Jalalabad
55	2013-12-26	Female	Farmer woman	Nangahar	Bihsood
56	2013-12-26	Female	Farmer woman	Nangahar	Bihsood
1 b	2013-02-17	Male	Farmer	Nangahar	Surkhrod
2 b	2013-02-18	Male	Farmer	Nangahar	Surkhrod
3 b	2013-02-18	Male	Farmer	Nangahar	Surkhrod
4 b	2013-02-20	Male	Farmer	Nangahar	Rodat
5 b	2013-02-20	Male	Farmer	Nangahar	Rodat
6 b	2013-02-20	Male	Farmer	Nangahar	Rodat
7 b	2013-02-19	Male	Agriculture Officer	Nangahar	Surkhrod
8 b	2013-02-19	Male	Agriculture Officer	Nangahar	Rodat
9 b	2013-02-18	Male	Mirab	Nangahar	Surkhrod
10 b	2013-02-17	Male	Trader	Nangahar	Jalalabad
11 b	2013-02-18	Male	Trader	Nangahar	Jalalabad
12 b	2013-02-19	Male	Trader	Nangahar	Jalalabad
13 b	2013-02-22	Male	Trader	KPK	Peshawar
14 b	2013-02-22	Male	Trader	KPK	Peshawar



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