



# UNODC

United Nations Office on Drugs and Crime



Government of Afghanistan  
Ministry of Counter Narcotics

# Afghanistan Opium Survey 2009

## Summary Findings



data collection

data transfer

data transfer

September 2009

## ABBREVIATIONS

ANP	Afghan National Police
CNPA	Counter Narcotics Police of Afghanistan
GLE	Governor-led eradication
ICMP	Illicit Crop Monitoring Programme (UNODC)
ISAF	International Security Assistance Force
MCN	Ministry of Counter-Narcotics
PEF	Poppy Eradication Force
UNODC	United Nations Office on Drugs and Crime

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# **Afghanistan Opium Survey 2009**

## **Summary Findings**

**September 2009**



## COMMENTARY BY THE EXECUTIVE DIRECTOR

The bottom is starting to fall out of the Afghan opium market. For the second year in a row, cultivation, production, work-force, prices, revenues, exports and its GDP share are all down, while the number of poppy-free provinces and drug seizures continue to rise.

Yet, Afghan drugs still have catastrophic consequences. They fund criminals, insurgents, and terrorists in Afghanistan and abroad. Collusion with corrupt government officials keeps undermining public trust, security, and the law. The taint of money-laundering is harming the reputation of banks in the Gulf, and farther afield.

The vulnerable are most at risk: drug use in Afghanistan is a growing problem, particularly among refugees. Drug addiction and HIV are spreading death and misery along opiate trafficking routes, particularly in Central Asia and Russia. Around the world, but especially in Europe, once again tens of thousands will die this year from heroin overdoses.

It is therefore essential to use this time of political change in Afghanistan to analyze the forces that are shrinking the opium market, and those needed to push further this process which is vulnerable to relapse.

### *The opium market plummets*

In 2009, opium cultivation in Afghanistan decreased by 22%, from 157,000 hectares (ha) in 2008 to 123,000 ha today. In Helmand alone, cultivation declined by a third, to less than 70,000 ha. Indeed, the major drop in Helmand corresponds to the entire national decline this year: -34,000 ha. The dramatic turn-around in Helmand can be attributed to an effective mix of sticks and carrots: governor leadership; a more aggressive counter-narcotics offensive; terms of trade more favourable to legal crops; and the (related) successful introduction of *food zones* to promote licit farming.

Around the country, the number of poppy-free provinces has increased from 18 to 20. Opium cultivation in four other provinces (Kabul at 132 ha, Kunar at 164 ha, Laghman at 135 ha and Nangarhar at 294 ha) is marginal. In three others (Badakhshan, Hirat and Nimroz) poppy-free status is within reach in the next farming season. At that point, more than two-thirds of the country would be poppy-free. Today, about a third is.

Production has dropped less dramatically because farmers have extracted more opium per bulb. Whereas in the Golden Triangle, poppies yield about 10 kg of opium per hectare, this year Afghan poppies (grown in the most fertile and best irrigated part of the country) yielded a record 56 kg/ha – a 15% increase over last year's already high figure of 49 kg. As a result, while cultivation decreased by 22%, in 2009 opium production was down by 10% to 6,900 tons. Still, to put this in perspective, the expected 800 ton decline is equivalent to roughly twice the amount currently supplied by the Golden Triangle, with a retail value of around \$8 billion in consuming nations.

Over-supply at the source and lower market penetration (in Europe) are pushing opium prices down. Wholesale (farm gate) prices in Afghanistan have fallen by a third in the past year: from \$70/kg to \$48/kg for fresh opium; from \$95/kg to \$64/kg for the dry variety. In Afghanistan, opium values (in nominal terms) have not been this low since the late 1990s, when the Taliban were in power, and the opium harvest was half the size of today.

This year opium farmers saw their (gross) earnings per hectare shrink by one quarter, to \$3,562/ha down from \$4,662/ha in 2008. Falling prices and lower cultivation this year caused a 40% collapse in the total farm-gate value of opium production in Afghanistan, for a total of \$438 million. This is equivalent to 4% of the country's (licit) GDP, down from 12% in 2007, and an unprecedented 27% in 2002. The fact that 800,000 fewer people are involved in opium production, compared to 2008, is another indication that the drug industry is becoming less attractive.

Afghan and NATO forces are compounding the pressure caused by market forces. After some reticence, the link between drugs and insurgency is now under attack, literally. In the first half of 2009, military operations destroyed over 90 tons of precursor chemicals, 450t of seeds, 50t of opium, 7t of morphine, 1.5t of heroin, 19t of cannabis resin and 27 labs. While this has knocked out only a fraction of the Afghan drug economy, it has increased the risks of drug trafficking, and created a deterrent for the future. Indeed, our *Survey* shows that farmers are increasingly wary of retaliation, trading has become more discreet, and stocks are now buried underground. The impunity enjoyed thus far by the Afghan drug economy is under threat. The risks/rewards balance is starting to tilt against drugs.

### ***The birth of Afghan narco-cartels***

Despite the progress, opium remains a major source of income in one of the world's poorest and most unstable countries. Farmers may grow it to stave off poverty. Criminals, insurgents and corrupt officials surely engage in its trade in the common pursuit of greed and power.

There is growing evidence – from tougher counter-narcotics and improved intelligence – that some anti-government elements in Afghanistan are turning into *narco-cartels*. It has happened elsewhere in the world. In Colombia, for example, drug trafficking (by FARC and ELN) started as a means to a political end – a way of funding an ideologically motivated *guerrilla* movement. Yet, the world over, drug money eventually trumps ideology, and becomes as addictive as the dope itself. Afghanistan is approaching this point. After years of collusion with criminal gangs and corrupt officials, some insurgents are now opportunistically moving up the value chain: not just taxing supply, but getting involved in producing, processing, stocking and exporting drugs. The impact this has on the stability of Afghanistan, and the ways and means to oppose it, require attention.

### *Avoiding a relapse*

Progress in Afghanistan should not be measured only by the rising number of opium free provinces or by the declining size of poppy fields. Counter-narcotics must be a growing part of national efforts to improve living standards and governance and, therefore, should be a higher priority in international assistance programmes.

*Eradicate poverty, not just poppies.* The world over, development is the most powerful means to contain the twin threats of drugs and insurgency. In Afghanistan, many farmers grow opium because they depend on loans provided by traders as a down payment for the subsequent drug harvest. Historically this has trapped farmers in debt bondage. Micro-credits can free farmers from their drug masters. Infrastructures, storage facilities and access to markets can help them market their (licit) crops. This has happened, but in an inadequate and fragmented way. In post-election Afghanistan, the rural development push must be as robust as the current military offensive – to feed and employ farmers, not just to search and destroy their drugs. There is no need to *bribe* farmers to stay away from drugs: market forces are already doing this. The new terms of trade caused by an over-supply of drugs and an under-supply of food are already convincing farmers that it pays *not* to grow poppies – especially if/once the climate of impunity starts fading. Two corollaries follow. (i) Just as the military are preparing for a *surge*, an assistance leap in the countryside is needed. Aid has been generous, but is choked by high costs of intermediation. (ii) Just as the military are reducing their operational *caveats*, development assistance needs fewer restrictions. The combination of individual foreign-sponsored projects around each PRT (understandably, to protect the fighting *boys*), does not amount to a coherent assistance program for Afghanistan. In short, what is needed to consolidate recent gains, and to push the process forward are more assistance, greater coherence, and fewer bottlenecks at delivery.

*Target rich criminals, not poor farmers.* In the past the focus was on eradication, rather than interdiction. It didn't work. Over the past two years, only 10,000 hectares of opium were eradicated: less than 4% of the amount planted, with an enormous human and economic cost. Interdiction, not a priority, suffered. As a result, although 90% of the world's opium comes from Afghanistan, less than 2% is seized there (more than 20% of global cocaine supply is seized by its main producer, Colombia). Afghan and NATO forces have started to disrupt the drug trade by dismantling high value assets. More is needed, for example going after the handful of drug kingpins who control the bulk of the trade. Security Council Resolution 1735 of December 2007 called for them to be listed, their travels banned, their assets seized. So far no names have been submitted to the Council. Major traffickers should be reported to the Security Council and brought to justice – not executed in violation of international law or pardoned for political expediency.

*Missing stocks a threat.* Annual world demand for illicit opium has never exceeded 5,000 tons. Yet, over the past few years, including in 2009, Afghan supply has well-exceeded this amount. Illicit drug stockpiles may have now reached 10,000 tons – enough to satisfy two years of world (heroin) addiction, or three years of medical (morphine) prescription. At a time of declining prices, commercial traders would not hold on to

devaluing assets. So the opium stocks are probably in the hands of people who are not motivated solely by commercial interests. After all, opium ages well; it is a means of payment easily transported, with a world-wide market. Intelligence agencies should defuse the ticking-bomb of opium stock-piles, before these become the source of potential sinister scenarios.

*A truly regional approach.* In southern Afghanistan, for years insurgents and drug traffickers alike have taken advantage of the strategic depth in Pakistan to regroup and strike again, moving opium, equipment, arms and foot soldiers back and forth, in reaction to law enforcement pressure. At present, under combined NATO/Afghan pressure the business is being pushed south and east. Yet, although a quarter of all Afghan narcotics is smuggled through Pakistan, there are no seizures in Pakistan's Federally Administered Tribal (border) Areas. The recent *Af/Pak focus* is welcome, yet too narrow. Yearly, as much as half of Afghanistan's opium is exported through Iran, threatening border security and spreading addiction. This is why UNODC has brokered a Trilateral Platform among Afghanistan, Iran and Pakistan to share counter-narcotics intelligence and run joint operations. It is working, with results operationally small but symbolically big. The northern axis is also crucial. Drugs moving north (along the Silk Road) through Central Asia into Russia and China are spreading addiction, HIV and insurgency. Expectations are high regarding the impact the UNODC-brokered Central Asia Intelligence Centre (CARICC) will have.

### ***An historical error***

Controlling drugs in Afghanistan will not solve all of the country's problems, but the country's problems can not be solved without controlling drugs. A second consecutive year of much lower opium cultivation and production is welcome news. The major decrease in Helmand demonstrates that progress is possible, even under the toughest conditions.

Does this biennium represent a market correction, or a downward trend? It is too early to tell, but progress very much depends on improved security. Like never before, the fates of counter-narcotics and counter-insurgency are inextricably linked.

So much has been invested to contain the drug economy in Afghanistan, that it would be an historical error to allow this undeniable progress to be undermined not in the opium fields of poor farmers, but in the killing fields of suicide bombers.



Antonio Maria Costa  
Executive Director  
United Nations *Office on Drugs and Crime*

### Fact Sheet Afghanistan Opium Survey 2009

	2008	Change on 2008	2009
Net opium cultivation (after eradication)	157,000 ha	-22%	123,000 ha
in % of agricultural land <sup>1</sup>	2.1%		1.6%
in % of cultivation in major opium cultivating countries	82%		NA
Number of poppy free provinces <sup>2</sup>	18	+2 provinces	20
Number of provinces affected by opium cultivation	16	-2 provinces	14
Eradication	5,480 ha	-2%	5,351
Weighted average opium yield	48.8 kg/ha	+15%	56.1 kg/ha
Potential production of opium	7,700 mt	-10%	6,900 mt
in % of production in major opium producing countries	94%		NA
No. of household involved in opium cultivation <sup>3</sup>	366,500		245,200
No. of persons involved in opium cultivation <sup>3</sup>	2.4 million		1.6 million
in % of total population <sup>3</sup>	9.8%		6.4%
Average farm-gate price (weighted by production) of fresh opium at harvest time <sup>4</sup>	US\$ 70/kg	-31%	US\$ 48/kg
Average farm-gate price (weighted by production) of dry opium at harvest time <sup>4</sup>	US\$ 95/kg	-34%	US\$ 64/kg
Current GDP <sup>5</sup>	US\$ 10.2 billion	+5%	US\$ 10.7 billion
Total farm gate value of opium production	US\$ 730 million	-40%	US\$ 438 million
in % of GDP	7%		4%
Potential export value of opium, morphine and heroin (border areas of neighbouring countries)	US\$ 3.4 billion		NA
Average yearly gross income from opium of opium growing households	US\$ 1,997	-10%	US\$ 1,786
Current GDP per capita <sup>5</sup>	US\$ 415	+3%	US\$ 426
Gross income from opium per ha	US\$ 4,662	-24%	US\$ 3,562
Gross income from wheat per ha	US\$ 1,625	-32%	US\$ 1,101

<sup>1</sup> The area available for agriculture was updated from 76,235 km<sup>2</sup> in 2008 to 77,217 km<sup>2</sup> in 2009.

<sup>2</sup> Poppy free provinces are those which are estimated to have less than 100 ha of opium cultivation.

<sup>3</sup> Due to a change in methodology and new information available on village population size, the figures from 2008 and 2009 are not directly comparable. Estimates are based on a population of 25.5 million and an average household size of 6.5 persons for 2009 (Afghan year 1387) and a population of 24.5 million for 2008 (Afghan year 1386). Source: Government of Afghanistan, Central Statistical Office.

<sup>4</sup> In 2008, the fresh and dry opium prices at harvest time were based on farmers responses collected through the Annual Opium Survey, which was conducted slightly before the opium harvest. In 2009, prices at harvest time were derived from the opium price monitoring system and refer to the month when opium harvest actually took place in the different regions of the country.

<sup>5</sup> Source: Government of Afghanistan, Central Statistical Office.



## SUMMARY FINDINGS

The total opium poppy cultivation estimated for Afghanistan in 2009 was 123,000 hectares (ha), a 22% reduction compared to the level in 2008. Ninety nine per cent of the total cultivation took place in seven provinces in the Southern and Western regions<sup>6</sup>, including the most insecure provinces in the country. This further substantiates the link between insecurity and opium cultivation observed since 2007.

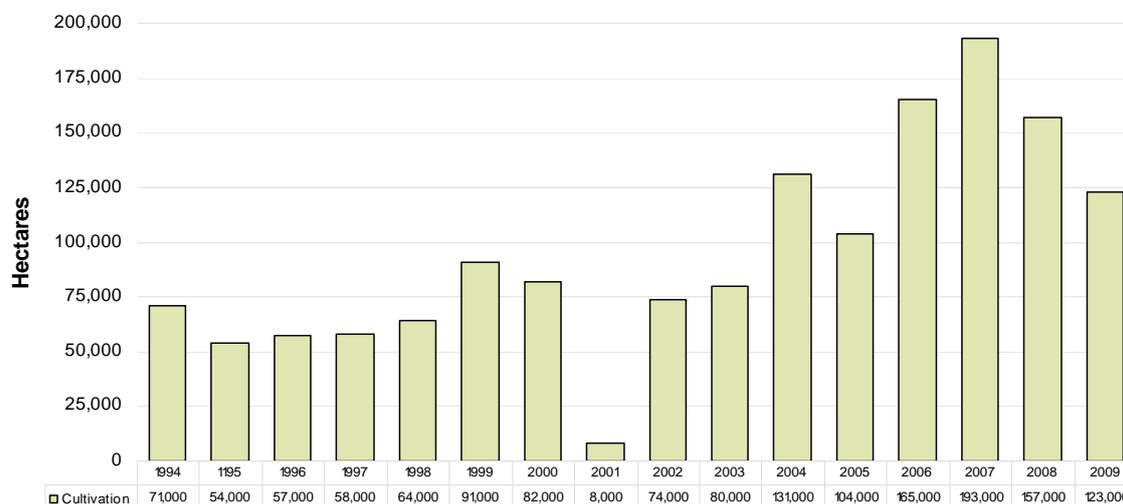
Total opium production in 2009 was estimated at 6,900 metric tons (mt), a 10% decrease from 2008. Virtually all the production (99%) took place in the same provinces where cultivation is concentrated. The other provinces produced only 1% of the country's total opium in 2009.

The seven main opium cultivating and producing provinces were Hilmand, Kandahar, Uruzgan, Day Kundi, Zabul, Farah and Badghis. The province of Nimroz is not on this list because its main opium cultivating area, located in Khash Rod district, was administratively re-defined as part of Farah province. The Northern region was poppy free for the first time in a decade.

Among the 34 provinces in the country, 20 were poppy free in 2009, compared to 18 in 2008. With the exception of Nangarhar, all provinces that were poppy free in 2008 remained so in 2009. The new poppy free provinces are Kapisa, Baghlan and Faryab.

The total estimated farm-gate income of opium growing farmers amounted to US\$ 438 million. This is a significant decrease from 2008, when farm-gate income for opium was estimated at US\$ 730 million.

**Figure 1: Opium cultivation in Afghanistan (ha), 1994-2009**



<sup>6</sup> Regions as designated by UNODC for analytical purposes. Please refer to Table 1 for a full list.

**Table 1: Opium cultivation (2005-2009) and eradication (2008-2009) in Afghanistan**

PROVINCE	Cultivation 2005 (ha)	Cultivation 2006 (ha)	Cultivation 2007 (ha)	Cultivation 2008 (ha)	Cultivation 2009 (ha)	Change 2008-2009 (ha)	Change 2008-2009 (%)	Eradication in 2008 (ha)	Eradication in 2009 (ha)
Kabul	Poppy free	80	500	310	132	-178	-57%	20	1.35
Khost	Poppy free	133	Poppy free	Poppy free	Poppy free	NA	NA	0	0
Logar	Poppy free	NA	NA	0	0				
Paktya	Poppy free	NA	NA	0	0				
Panjshir	Poppy free	NA	NA	0	0				
Parwan	Poppy free	124	Poppy free	Poppy free	Poppy free	NA	NA	0	0
Wardak	106	Poppy free	Poppy free	Poppy free	Poppy free	NA	NA	0	0
Ghazni	Poppy free	NA	NA	0	0				
Paktika	Poppy free	NA	NA	0	0				
<b>Central Region</b>	<b>106</b>	<b>337</b>	<b>500</b>	<b>310</b>	<b>132</b>	<b>-178</b>	<b>-57%</b>	<b>20</b>	<b>1.35</b>
Kapisa	115	282	835	436	Poppy free	NA	NA	59	31
Kunar	1,059	932	446	290	164	-126	-43%	103	11
Laghman	274	710	561	425	135	-290	-68%	26	0
Nangarhar	1,093	4,872	18,739	Poppy free	294	NA	NA	26	226
Nuristan	1,554	1,516	Poppy free	Poppy free	Poppy free	NA	NA	3	0
<b>Eastern Region</b>	<b>4,095</b>	<b>8,312</b>	<b>20,581</b>	<b>1,151</b>	<b>593</b>	<b>-558</b>	<b>-48%</b>	<b>217</b>	<b>269.05</b>
Badakhshan	7,370	13,056	3,642	200	557	357	179%	774	420
Takhar	1,364	2,178	1,211	Poppy free	Poppy free	NA	NA	0	0
Kunduz	275	102	Poppy free	Poppy free	Poppy free	NA	NA	0	0
<b>North-eastern Region</b>	<b>9,009</b>	<b>15,336</b>	<b>4,853</b>	<b>200</b>	<b>557</b>	<b>357</b>	<b>179%</b>	<b>774</b>	<b>420.36</b>
Baghlan	2,563	2,742	671	475	Poppy free	NA	NA	85	0
Balkh	10,837	7,232	Poppy free	Poppy free	Poppy free	NA	NA	0	0
Bamyan	126	17	Poppy free	Poppy free	Poppy free	NA	NA	0	0
Faryab	2,665	3,040	2,866	291	Poppy free	NA	NA	0	261
Jawzjan	1,748	2,024	1,085	Poppy free	Poppy free	NA	NA	0	0
Samangan	3,874	1,960	Poppy free	Poppy free	Poppy free	NA	NA	0	0
Sari Pul	3,227	2,252	260	Poppy free	Poppy free	NA	NA	0	0
<b>Northern Region</b>	<b>25,040</b>	<b>19,267</b>	<b>4,882</b>	<b>766</b>	<b>Poppy free</b>	<b>NA</b>	<b>NA</b>	<b>85</b>	<b>261.24</b>
Hilmand	26,500	69,324	102,770	103,590	69,833	-33,757	-33%	2,537	4119
Kandahar	12,989	12,619	16,615	14,623	19,811	5,188	35%	1,222	69
Uruzgan	2,024	9,703	9,204	9,939	9,224	-715	-7%	113	74
Zabul	2,053	3,210	1,611	2,335	1,144	-1,191	-51%	0	0
Day Kundi	2,581	7,044	3,346	2,273	3,002	729	32%	0	27
<b>Southern Region</b>	<b>46,147</b>	<b>101,900</b>	<b>133,546</b>	<b>132,760</b>	<b>103,014</b>	<b>-29,746</b>	<b>-22%</b>	<b>3,872</b>	<b>4289.06</b>
Badghis	2,967	3,205	4,219	587	5,411	4,824	822%	0	0
Farah	10,240	7,694	14,865	15,010	12,405*	-2,605*	(-17%)	9	43
Ghor	2,689	4,679	1,503	Poppy free	Poppy free	NA	NA	38	0
Hirat	1,924	2,287	1,525	266	556	290	109%	352	67
Nimroz	1,690	1,955	6,507	6,203	428*	-5,775*	(-93%)	113	0
<b>Western Region</b>	<b>19,510</b>	<b>19,820</b>	<b>28,619</b>	<b>22,066</b>	<b>18,800</b>	<b>-3,266</b>	<b>-15%</b>	<b>511</b>	<b>109.86</b>
<b>Total (rounded)</b>	<b>104,000</b>	<b>165,000</b>	<b>193,000</b>	<b>157,000</b>	<b>123,000</b>	<b>-34,000</b>	<b>-22%</b>	<b>5,480</b>	<b>5,351</b>

\* Due to administrative boundary changes, the 2009 estimates for Farah and Nimroz were calculated considering parts of Khash Rod district, the main opium cultivating district in Nimroz, as being in Farah province. The 2008 figures include all of Khash Rod district in Nimroz province.

A province is defined as poppy free when it is estimated to have less than 100 ha of opium cultivation.

### **Opium cultivation decreases by 22% in 2009**

The area under opium cultivation in Afghanistan decreased by 22% in 2009, from 157,000 ha in 2008 to 123,000 ha, 99% of which was concentrated in the Southern and Western regions. Opium poppy cultivation decreased in all regions except the North-eastern region, where in any case very little cultivation remained.

The regional divide of opium cultivation between the south and rest of the country continued to deepen in 2009. Most of the opium cultivation is confined to the south and west, which are dominated by insurgency and organized criminal networks. This mirrors the sharper polarization of the security situation between the lawless south and relatively stable north of the country.

The major differences between opium cultivation patterns in 2009 compared to 2008 were a drastic decrease in cultivation in Hilmand province, which contributed the bulk of the overall decrease; a significant increase in opium cultivation in Badghis and Kandahar provinces; and mixed signals from the Eastern region, where Kapisa became poppy free for the first time. Nangarhar, however, could not retain the poppy free status it had achieved in 2008, but the level of opium cultivation remained low.

### **Number of poppy free provinces increases to 20 in 2009**

The number of poppy free provinces<sup>7</sup> increased to 20 in 2009, compared to 18 in 2008 and 13 in 2007. Kapisa (Eastern region), Baghlan and Faryab (both Northern region) provinces became poppy free for the first time.

**Table 2: Provinces with poppy free status in 2009 (<100 ha poppy cultivation)**

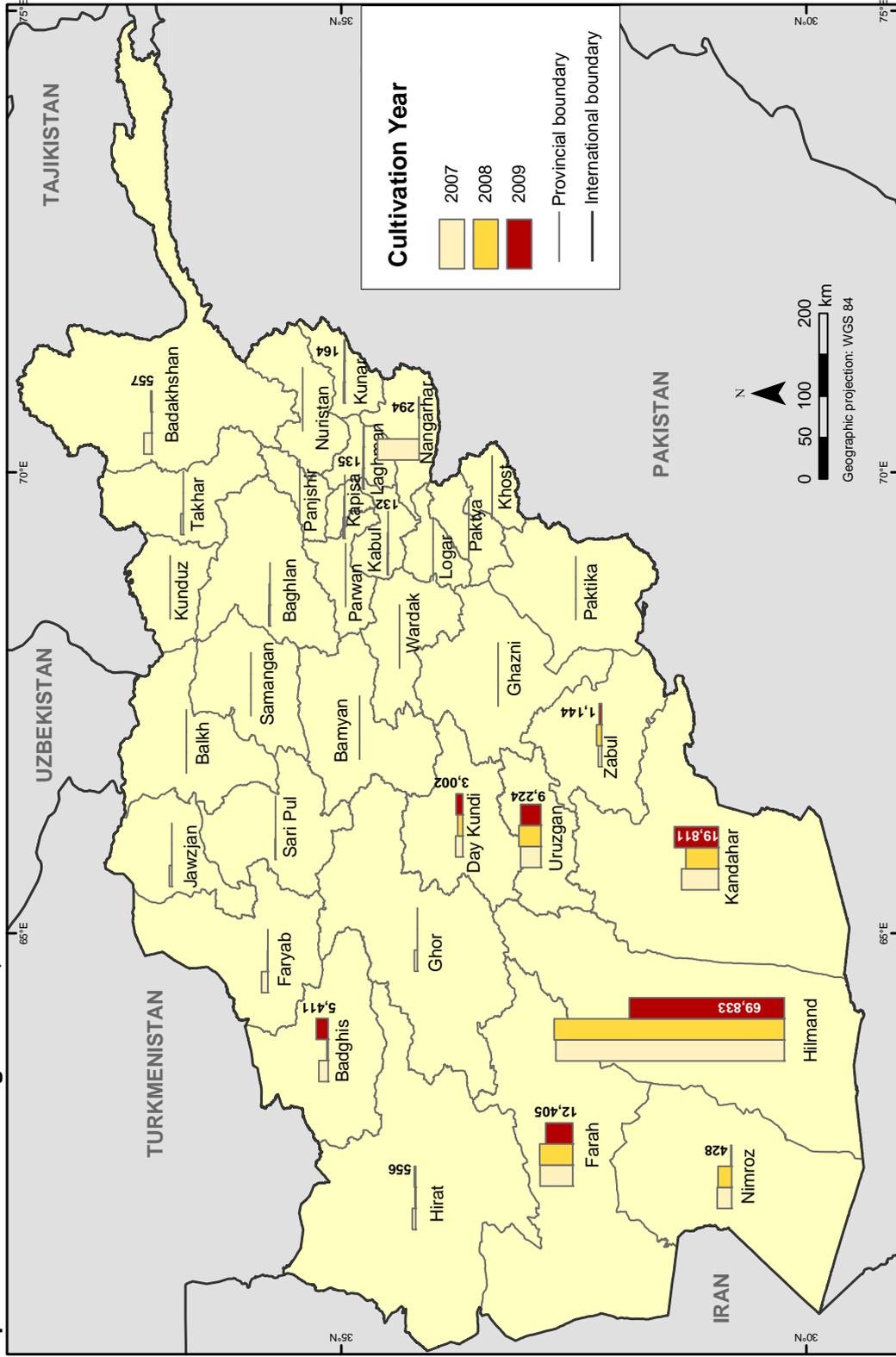
<b>Region</b>	<b>Province</b>
Central region	Ghazni, Khost, Logar, Paktika, Paktya, Panjshir, Parwan, Wardak, Kapisa*
Northern region	Balkh, Bamyan, Jawzjan, Samangan, Sari Pul, Faryab*, Baghlan*
North-Eastern region	Kunduz, Takhar
Eastern region	Nuristan
Western region	Ghor

\* Provinces which were not poppy free in 2008 but became poppy free in 2009.

Almost all provinces free of poppy in 2008 remained poppy free in 2009, with exception of Nangarhar. Campaigns against poppy cultivation and effective law enforcement by the Government contributed to maintaining the provinces' poppy free status. Efforts were made in the remaining poppy cultivating provinces in the Eastern (Kunar, Laghman, Nangarhar), Central (Kabul) and Northern regions (Badakhshan) to considerably reduce cultivation, but despite the low levels remaining in 2009, they did not drop under the 100 ha poppy free threshold.

<sup>7</sup> A province is defined as poppy free when it is estimated to have less than 100 ha of opium cultivation.

# Opium cultivation in Afghanistan, 2007-2009



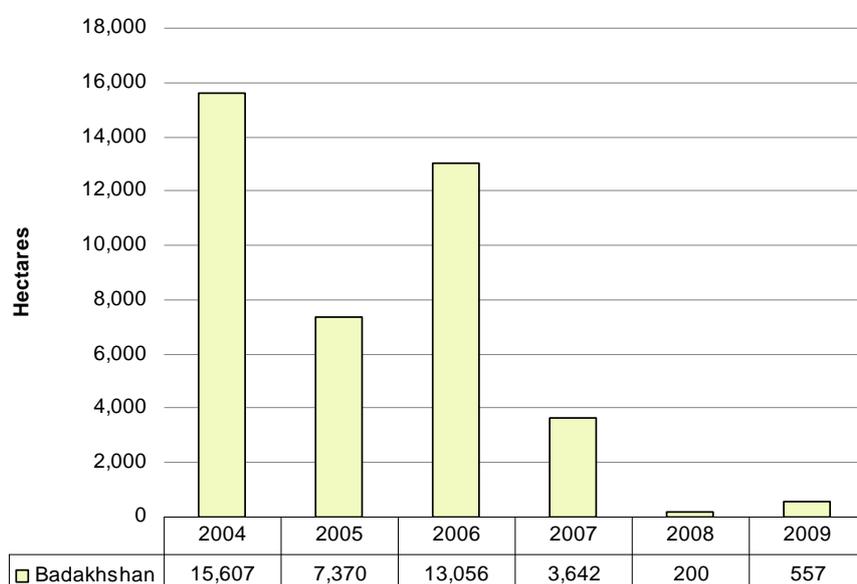
Source: Government of Afghanistan - National monitoring system implemented by UNODC.  
 Note: The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations.



**All provinces of the Northern region are poppy free for the first time in almost a decade**

The Northern region consists of Baghlan, Balkh, Bamiyan, Faryab, Jawzjan, Samangan and Sari Pul provinces. In 2009, for the first time in almost a decade, all the provinces in this region were poppy free. Most of these provinces sustained moderate levels of opium cultivation in the past except Balkh. This province emerged as a major opium cultivating province in 2005 and 2006 (10,837 ha and 7,232 ha respectively), whereas the rest of the provinces contributed in the range of 2,000 to 3,000 ha each. The decline in opium cultivation in the Northern region started with strict law enforcement and counter-narcotic initiatives. In 2008, poppy cultivation in these provinces was already negligible and Balkh has remained poppy free since 2007.

**Figure 2: Opium poppy cultivation in Badakhshan province (ha), 2004-2009**

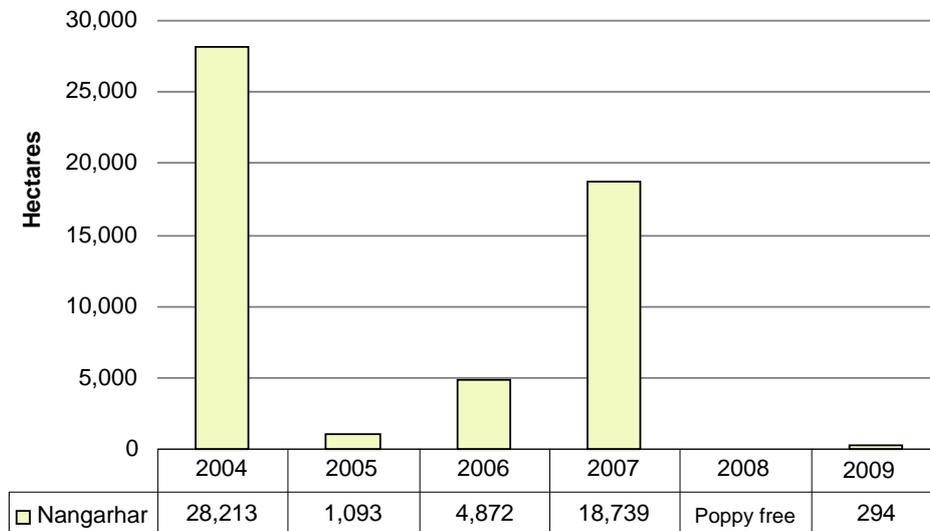


In the North-eastern region, Kunduz has been poppy free since 2007 and Takhar since 2008. In 2009, Badakhshan remained the only opium cultivating province in this region. However, despite a large proportional increase of 179%, poppy cultivation remained comparatively low at 557 ha, all of which happened in rain-fed areas. The increase happened in spite of 420 ha being eradicated.

**Nangarhar maintains low level of cultivation**

Nangarhar province became poppy free for the first time in 2008. In 2009, however, 294 ha of opium poppy were detected, despite 226 ha being eradicated. Nangarhar, traditionally a large opium growing province, was the only province that lost its poppy free status in 2009.

**Figure 3: Opium cultivation in Nangarhar province (ha), 2004-2009**



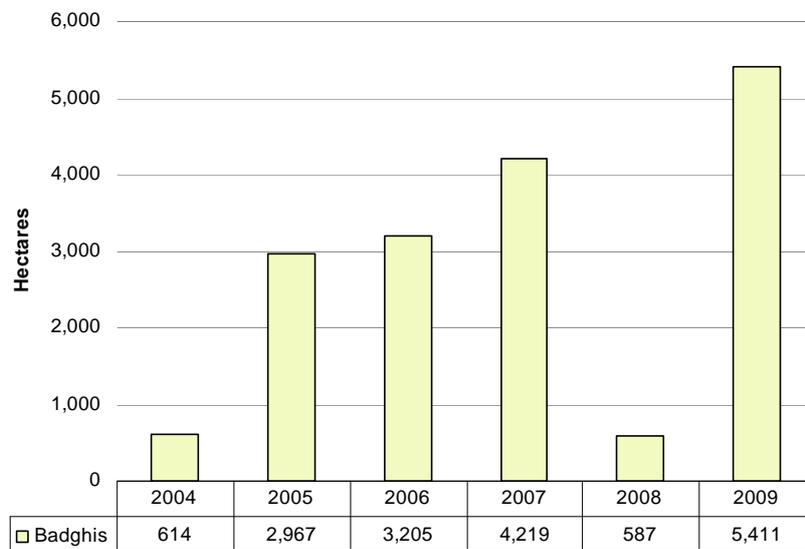
In the last six years, the level of opium cultivation in Nangarhar has been erratic. In 2004, cultivation was at 28,213 ha, the following year it dropped drastically to 1,093 ha and was confined to remote parts of the province. In 2006, it increased to 4,872 ha and in 2007 again increased to 18,739, before becoming poppy free in 2008.

In 2009, Laghman and Kunar provinces of the Eastern region were virtually poppy free with negligible amounts of cultivation (135 ha and 164 ha respectively).

***Badghis emerges as major opium cultivating province***

Opium cultivation level in Badghis province has been rising steadily since 2004. In 2008, cultivation was expected to be high, but the total failure of rain-fed crops contributed to the drop in opium cultivation. In 2009, good rainfall resulted in extensive cultivation in rain-fed areas of this province, enabling farmers to grow more poppy. This contributed to a strong increase in opium cultivation from only 587 ha in 2008 to 5,411 ha in 2009, most of which was in areas that are difficult to access. With the exception of the drought year 2008, Badghis has experienced a continuous increase in the area under opium cultivation since 2004. In 2009, it emerged as one of the major opium cultivating provinces.

**Figure 4: Opium cultivation in Badghis province (ha), 2004-2009**

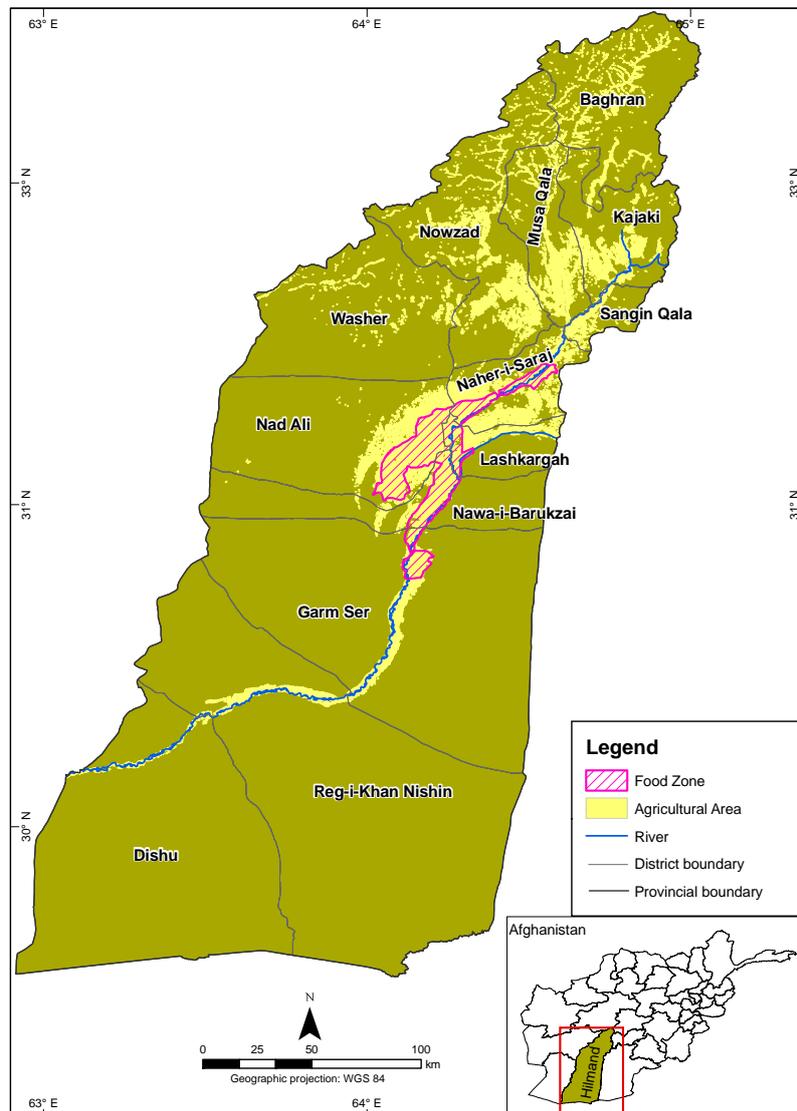


***Opium cultivation in Hilmand decreases by 33%***

In 2009, opium cultivation in Hilmand went down by 33,757 ha (33%) compared to 2008. Despite this considerable reduction, Hilmand remained the largest opium cultivating province with 69,833 ha (57% of total cultivation in Afghanistan). The overall 22% reduction in opium cultivation in Afghanistan in 2009 was mainly due to reductions in Hilmand.

Independent figures from a study done by Cranfield University (UK) showed that opium cultivation in the so-called “food zone” in Hilmand decreased by 37%, and was mainly replaced by cereal crops. Outside the food zone, however, poppy cultivation increased by 8%. The food zone programme comprised anti-poppy awareness raising campaigns, the distribution of wheat seed and fertilizer to farmers, and law enforcement activities including eradication. It covered the districts of Lashkar Gah, Nad Ali, Gereshk, Garm Seir, Sangin Qala and Musa Qala in Hilmand. The programme was implemented by Hilmand’s Governor with financial and technical support from the UK and USA.

## Hilmand food zone, 2009

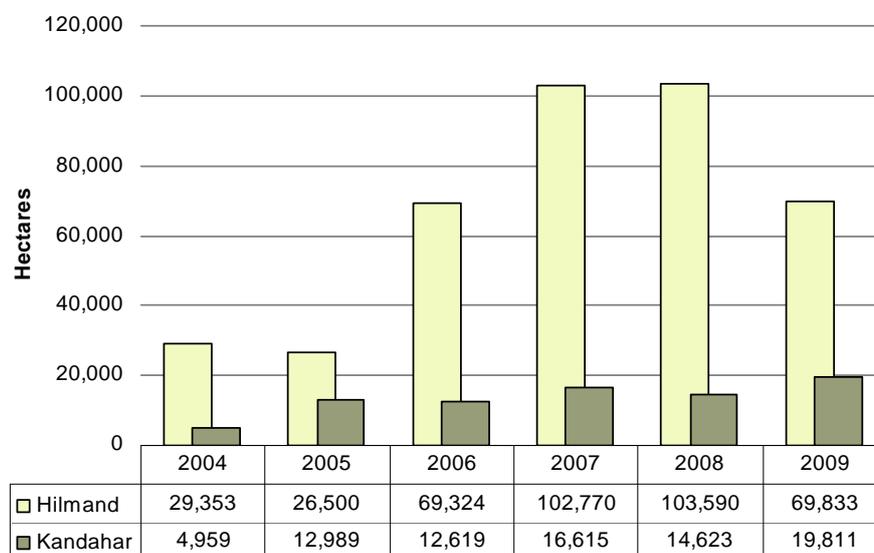


The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations.

### ***99% of opium cultivation is concentrated in the Southern and Western regions***

In 2009, 84% of opium cultivation was concentrated in the Southern region. Kandahar was the only province in this region that showed a significant increase in opium cultivation, from 14,623 ha in 2008 to 19,811 ha in 2009 (35%). In 2009, Kandahar was the second largest opium cultivating province after Hilmand, which, in spite of a strong decrease over 2008, still had over three times more area under opium cultivation than Kandahar.

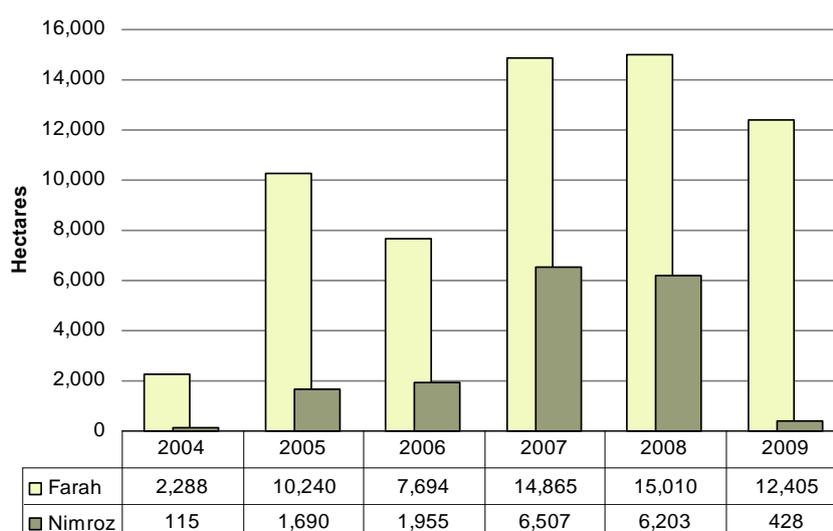
**Figure 5: Opium cultivation in Hilmand and Kandahar provinces (ha), 2004-2009**



In 2009, Nimroz province in the Western region ceased to be a major opium cultivating province as parts of its main opium cultivating district, Khash Rod, were shifted into the neighbouring Farah province. Khash Rod district had contributed over 95% of opium cultivation in Nimroz province in the past. Despite this shift, opium cultivation in Farah decreased from 15,010 ha in 2008 to 12,405 ha in 2009. In absolute terms, both provinces have shown a significant reduction in opium cultivation.

Security has been a major problem in the Southern and Western regions. Because the lack of security compromises the rule of law from the legitimate Government, counter-narcotic interventions are limited and these regions consistently show very high opium cultivation levels.

**Figure 6: Opium cultivation in Farah and Nimroz provinces (ha), 2004-2009**



**Table 3: Regional distribution of opium cultivation, 2008-2009**

Region	2008 (ha)	2009 (ha)	Change 2008-2009	2009 (ha) as % of total
Southern	132,760	103,014	-22%	84%
Western	22,066	18,800	-15%	15%
Eastern	1,151	593	-48%	0.5%
North-eastern	200	557	179%	0.5%
Central	310	132	-82%	0.1%
Northern	766	Poppy free	NA	NA
<b>Rounded Total</b>	<b>157,000</b>	<b>123,000</b>	<b>-22%</b>	<b>100%</b>

**Table 4: Main opium cultivating provinces in Afghanistan (ha), 2009**

Province	2007	2008	2009	Change 2008-2009
Hilmand	102,770	103,590	69,833	-33%
Kandahar	16,615	14,623	19,811	35%
Farah*	14,865	15,010	12,405	(-17%)
Uruzgan	9,204	9,939	9,224	-7%
Badghis	4,219	587	5,411	822%
Day Kundi	3,346	2,273	3,002	32%
Nimroz*	6,507	6,203	428	(-93%)
Rest of the country	43,020	7,888	2,982	-62%
<b>Total</b>	<b>193,000</b>	<b>157,000</b>	<b>123,000</b>	<b>-22%</b>

\* Due to administrative boundary changes, the 2009 estimates for Farah and Nimroz were calculated considering parts of Khash Rod district, the main opium cultivating district in Nimroz, as part of Farah province. The 2008 figures include all of Khash Rod district in Nimroz province.

Figure 7: Airborne collection of ground reference information over Hilmand, 2009



Aerial photo taken on 28 March 09 over Nadi Ali district of Hilmand province



False colour satellite image of the same area acquired on 11 April 2009 showing poppy and wheat fields in different shades of red.

### **Potential opium production in Afghanistan declines to 6,900 mt in 2009**

The average yield (weighted by production) for Afghanistan in 2009 was 56.1 kg/ha, compared to 48.8 kg/ha in 2008. Overall, weather conditions were favorable for agricultural crops in 2009 and there were no reports of damages caused by unfavorable weather, diseases or pests. As a consequence, potential opium production decreased by only 10% to 6,900 mt, despite opium cultivation dropping by 22%.

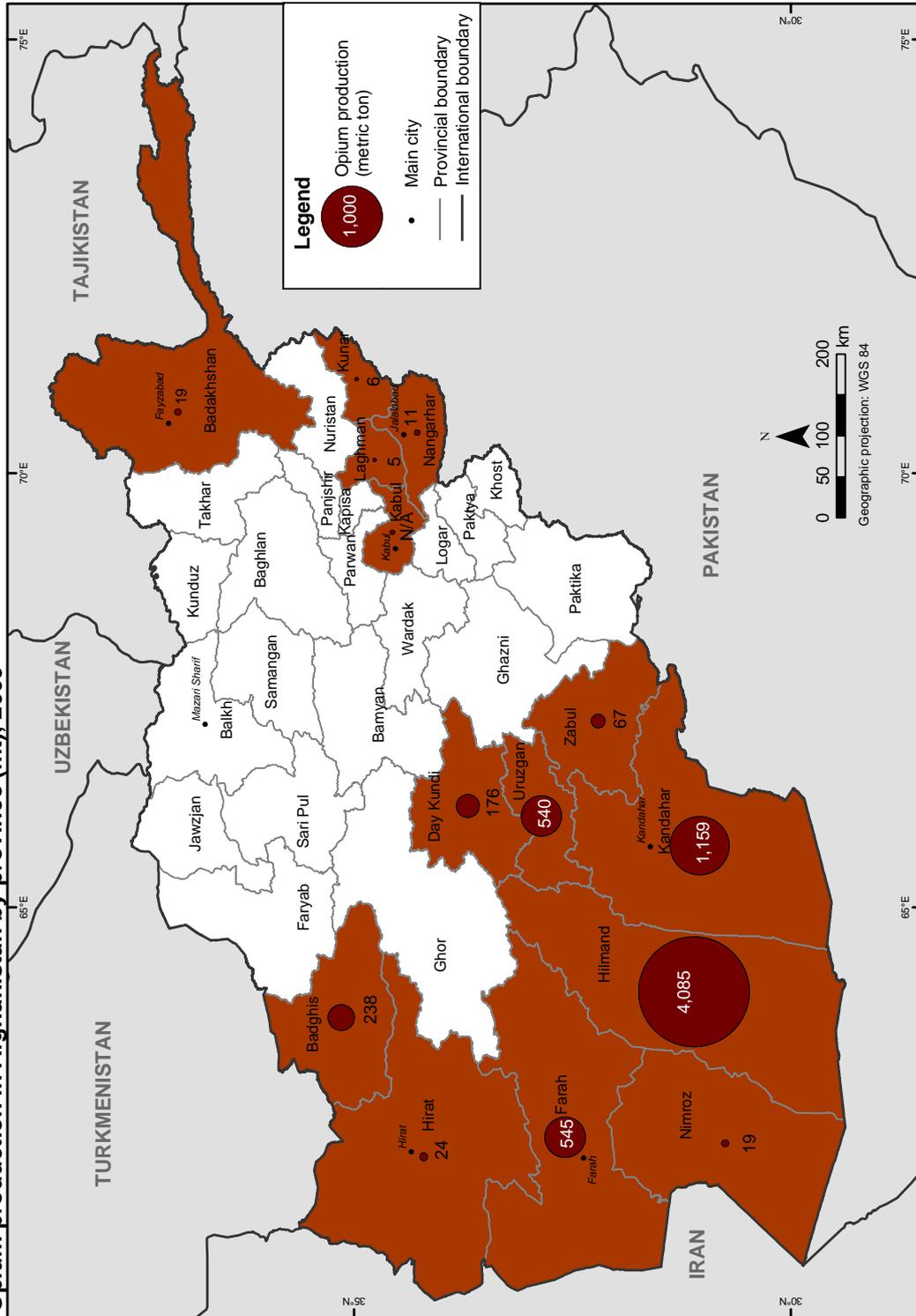
In the last two years, unusually high opium yields have been estimated for Afghanistan. This is the result of many different factors, among which are good climatic conditions, low levels of plant diseases and pests, and the shift of the opium cultivation to the fertile southern lowlands where irrigation and improved farming techniques are more widespread than in other parts of the country. Opium yield is estimated using a correlation between poppy capsule sizes (volumes) and numbers on the one hand and the harvested opium gum on the other. This correlation was established in scientific harvest trials in Thailand, Pakistan and Afghanistan in the 1990s and early 2000s. However, the capsule sizes and numbers observed in recent years in Afghanistan, mainly in the Southern region, are much higher than those observed during these trials and exceed the range of values for which the correlation was established. It is uncertain how opium yield and capsule size and numbers correlate when these numbers are as high as those observed in Afghanistan during the last two years. Further research into opium yield is therefore necessary. The findings of this research may well lead to a revision of opium yield estimates in Afghanistan.

**Table 5: Average opium yield by region in Afghanistan, 2008-2009**

<b>Region</b>	<b>2008 Average yield (kg/ha)</b>	<b>2009 Average yield (kg/ha)</b>	<b>Change</b>
Central (Parwan, Paktya, Wardak, Khost, Kabul, Logar, Ghazni, Paktika, Panjshir)	36.2	NA*	NA
Eastern (Nangarhar, Kunar, Laghman, Nuristan, Kapisa)	39.3	36.2	-8%
North-east (Badakhshan, Takhar, Kunduz)	31.4	34.3	9%
Northern (Bamyan, Jawzjan, Sari Pul, Baghlan, Faryab, Balkh, Samangan)	54.6	NA*	NA
Southern (Hilmand, Uruzgan, Kandahar, Zabul, Day Kundi)	52.1	58.5	12%
Western (Ghor, Hirat, Farah, Nimroz, Badghis)	29.7	43.9	48%
<b>Weighted national average</b>	<b>48.8</b>	<b>56.1</b>	<b>15%</b>

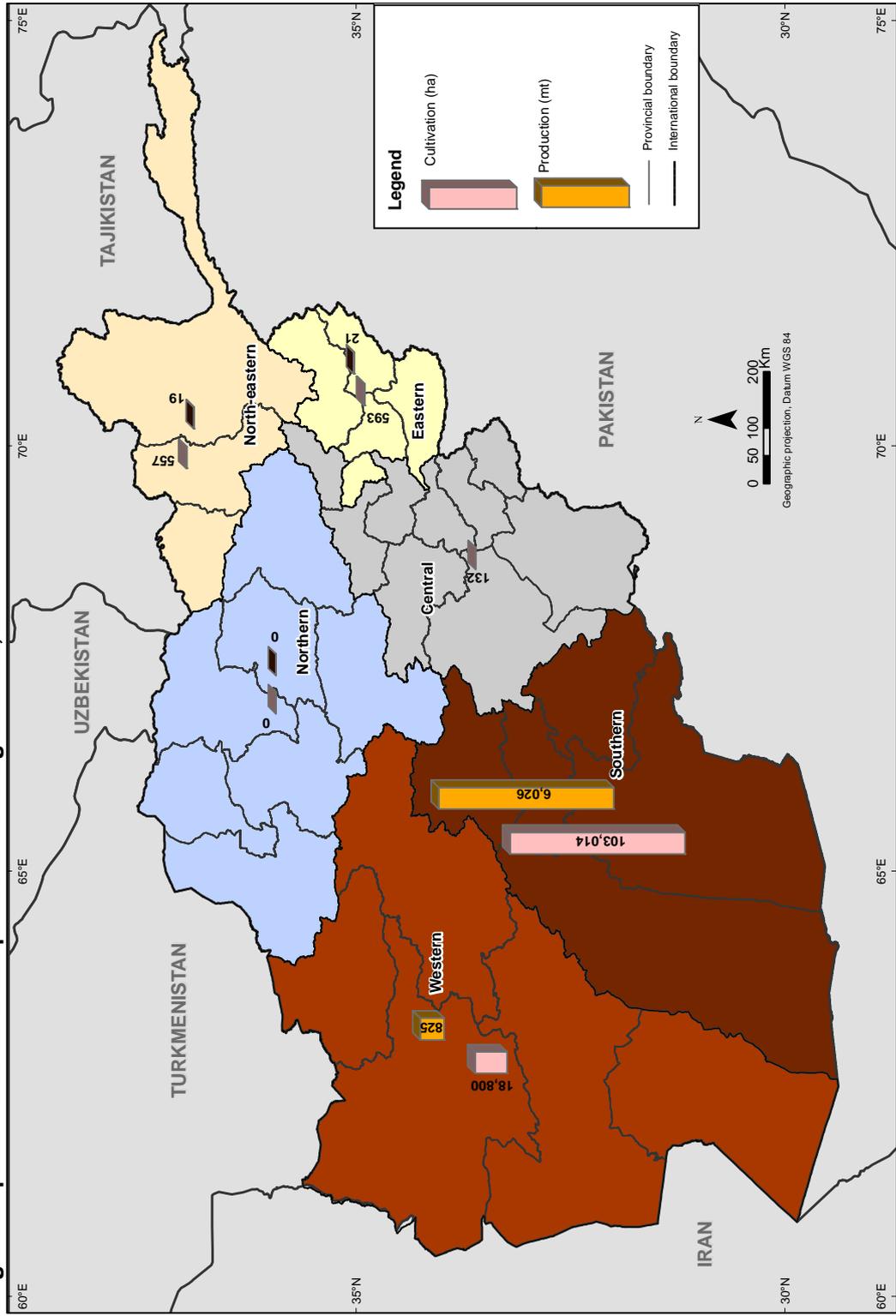
\* For the Central region, no regional yield figure was calculated due to a low number of yield measurements in this region. The Northern region was poppy free.

# Opium production in Afghanistan by province (mt), 2009



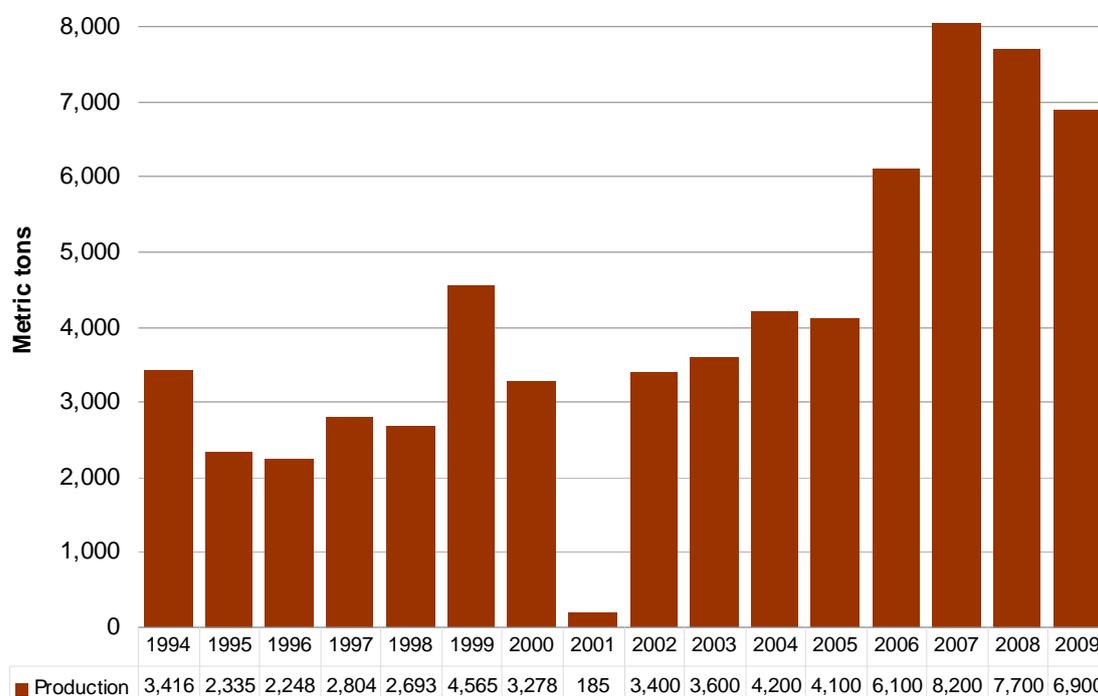
Source: Government of Afghanistan - National monitoring system implemented by UNODC  
 Note: The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations.

# Regional opium cultivation and production in Afghanistan, 2009



Source: Government of Afghanistan - National monitoring system implemented by UNODC  
 Note: The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations.

**Figure 8: Potential opium production in Afghanistan (mt), 1994-2009**



About 87% of total opium production took place in the Southern region (6,026 mt) and 12% took place in the Western region (825 mt) in 2009.

**Table 6: Potential opium production by region (mt), 2008-2009**

PROVINCE	Production 2008 (mt)	Production 2009 (mt)	Change 2008-2009 (mt)	Change 2008-2009 (%)
Central Region*	11	NA*	NA	NA
Eastern Region	45	21	-24	-53%
North-eastern Region	6	19	13	204%
Northern Region	42	0	-42	-100%
Southern Region	6,917	6,026	-890	-13%
Western Region	655	825	170	26%
<b>Total (rounded)</b>	<b>7,700</b>	<b>6,900</b>	<b>-800</b>	<b>-10%</b>

\* For the Central region, no specific regional production figure was calculated due to a low number of yield measurements in this region.

Opium production in Hilmand (4,085 mt) dropped by 24% compared to 2008 but was still close to Afghanistan's total production in 2005 (4,100 mt). The highest increase in production was estimated in Badghis province with 238 mt (14 times more than in 2008).

Opium production in Kandahar (1,159 mt) almost doubled due to the increase in opium cultivation. The province remained the second largest producer of opium in Afghanistan

in 2009. Other provinces that contributed significantly to production were Farah (545 mt), Uruzgan (540 mt) and Day Kundi (176 mt) and Zabul (67 mt).

**Table 7: Potential opium production in main opium producing provinces (mt), 2008-2009**

PROVINCE	Production 2008 (mt)	Production 2009 (mt)	Change 2008-2009 (mt)	Change 2008-2009 (%)
Hilmand	5,397	4,085	-1,312	-24%
Kandahar	762	1,159	397	52%
Farah	446	545	99	22%
Uruzgan	518	540	22	4%
Badghis	17	238	220	1263%
Day Kundi	118	176	57	48%
Zabul	122	67	-55	-45%

***Eradication remains at low level of 2008***

A total of 5,351 ha of eradicated poppy fields were verified by MCN/UNODC including Governor-led eradication (GLE) (2,687 ha) and eradication executed by the Poppy Eradication Force (PEF) (2,663 ha). GLE was carried out in 12 provinces whereas PEF conducted eradication only in Hilmand and Badakhshan provinces. The final figures of eradication in Hilmand and Badakhshan provinces were adjusted after verification using satellite images since cases of over-reporting were observed in the preliminary reports received from these provinces.

**Table 8: Eradication and cultivation in Afghanistan (ha) 2005-2009**

Year	2005	2006	2007	2008	2009
GLE (ha)	4,000	13,050	15,898	4,306	2,687
PEF (ha)	210	2,250	3,149	1,174	2,663
<b>Total (ha)</b>	<b>4,210</b>	<b>15,300</b>	<b>19,510</b>	<b>5,480</b>	<b>5,351</b>
Opium cultivation (ha)*	104,000	165,000	193,000	157,000	123,000
Eradication as % of opium cultivation	4%	9%	10%	3%	4%

\* Net opium cultivation after eradication

Points of note regarding eradication carried out in 2009 were:

- Total eradication was around 4% of the total opium cultivation.
- Eradication was insignificant in major opium growing provinces like Kandahar, Farah and Uruzgan.
- Timely eradication could have made Kunar, Laghman, Kabul, Badakhshan, Nangarhar, Hirat and Nimroz province poppy free considering the low level of cultivation in these provinces.
- Eradication took place in 12 provinces in 2009 compared to 17 in 2008. Unlike last year, eradication did not take place in Ghor, Baghlan, Jawzjan and Nuristan because of negligible opium cultivation in these provinces. However, eradication

- did not take place in Laghman, Nimroz and Zabul due to lack of planning and will to eradicate.
- The security situation continued to be unfavorable for eradication campaigns in 2009, since most of the opium cultivation was confined to the Southern and Western provinces, which are affected by insurgency and organized crime groups.
  - In 2009, there were 21 deaths related to eradication compared to 78 deaths in 2008. GLE and PEF teams were attacked 34 times during eradication in Badakhshan, Faryab, Hilmand, Kandahar, Kunar, Hirat, Nangarhar, Uruzgan and Zabul provinces.
  - Most of the security related incidents were reported in Hilmand province. In 2008, most incidents took place in Nangarhar and Nimroz provinces.
  - In 2009, resistance by farmers to eradication was far less than in 2008.

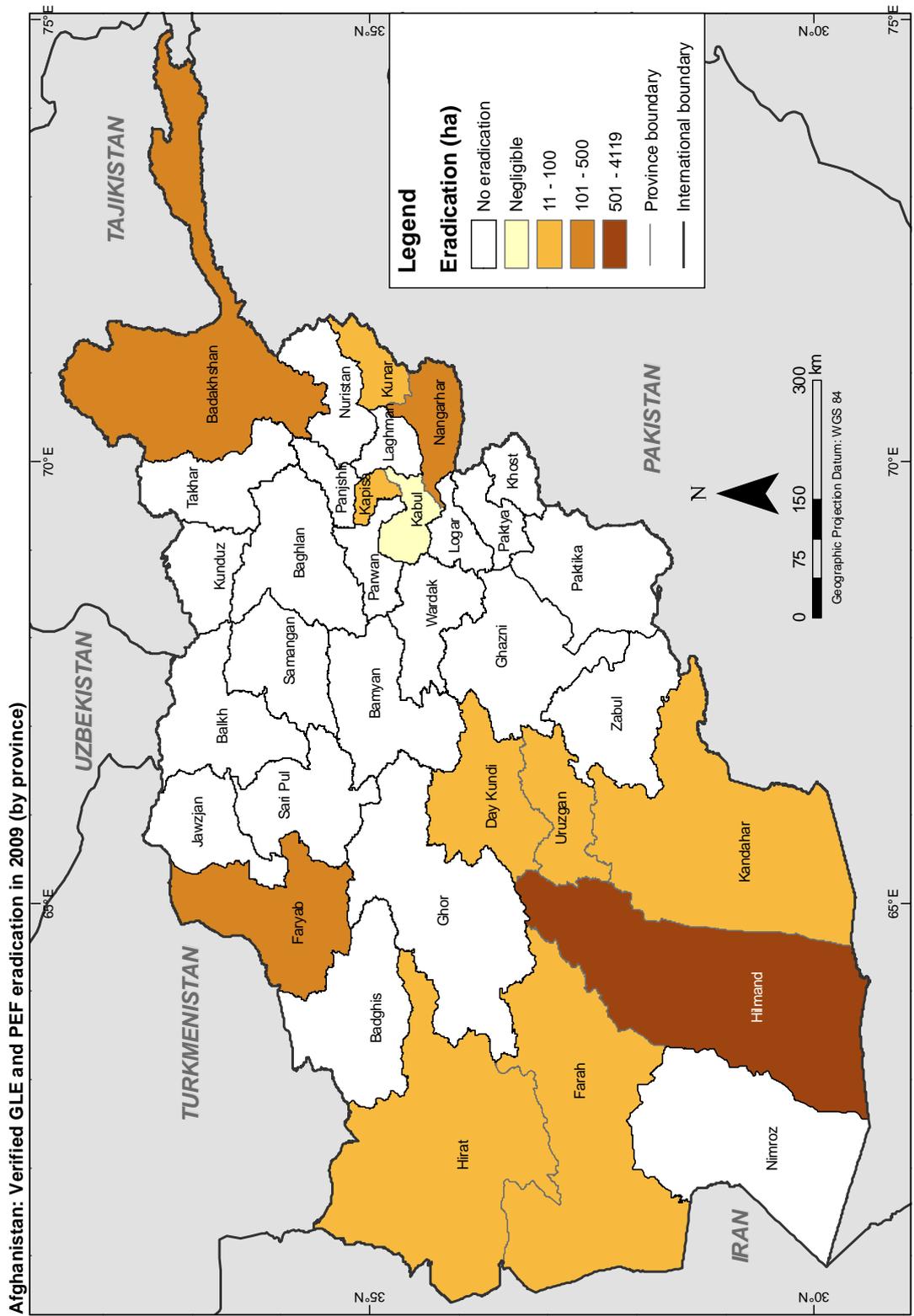
**Table 9: Security incidents during GLE and PEF eradication, 2008-2009**

	2008	2009	% change
<b>Persons injured</b>	>100	52	-48% or more
<b>Fatalities</b>	78	21	-73%

As reported by eradication verification surveyors.

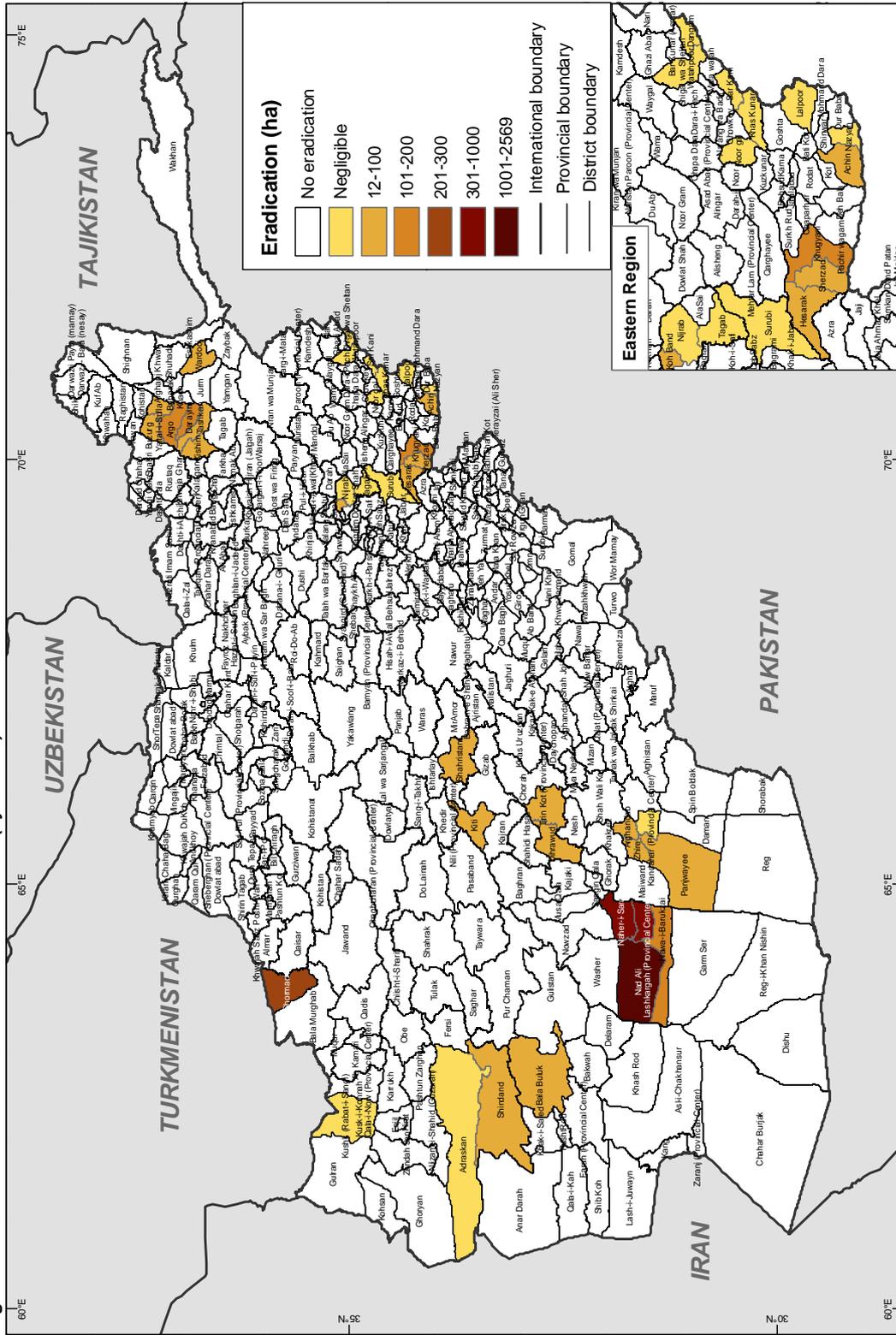
**Table 10: Governor-led eradication by province (ha), 2009**

Province	Eradication verified (ha)	No. of eradicated fields reported	No. of villages with eradication reported
Badakhshan	401	1598	158
Day Kundi	27	113	24
Farah	43	75	8
Faryab	261	236	10
Hilmand	1,475	2,275	54
Hirat	67	247	31
Kabul	1	9	3
Kandahar	69	154	28
Kapisa	31	224	25
Kunar	11	152	12
Nangarhar	226	808	33
Uruzgan	74	371	26
<b>Total</b>	<b>2,687</b>	<b>6,262</b>	<b>412</b>



Source: Government of Afghanistan - National monitoring system implemented by UNODC  
 Note: The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations.

Afghanistan: Verified GLE and PEF eradication in 2009 (by district)



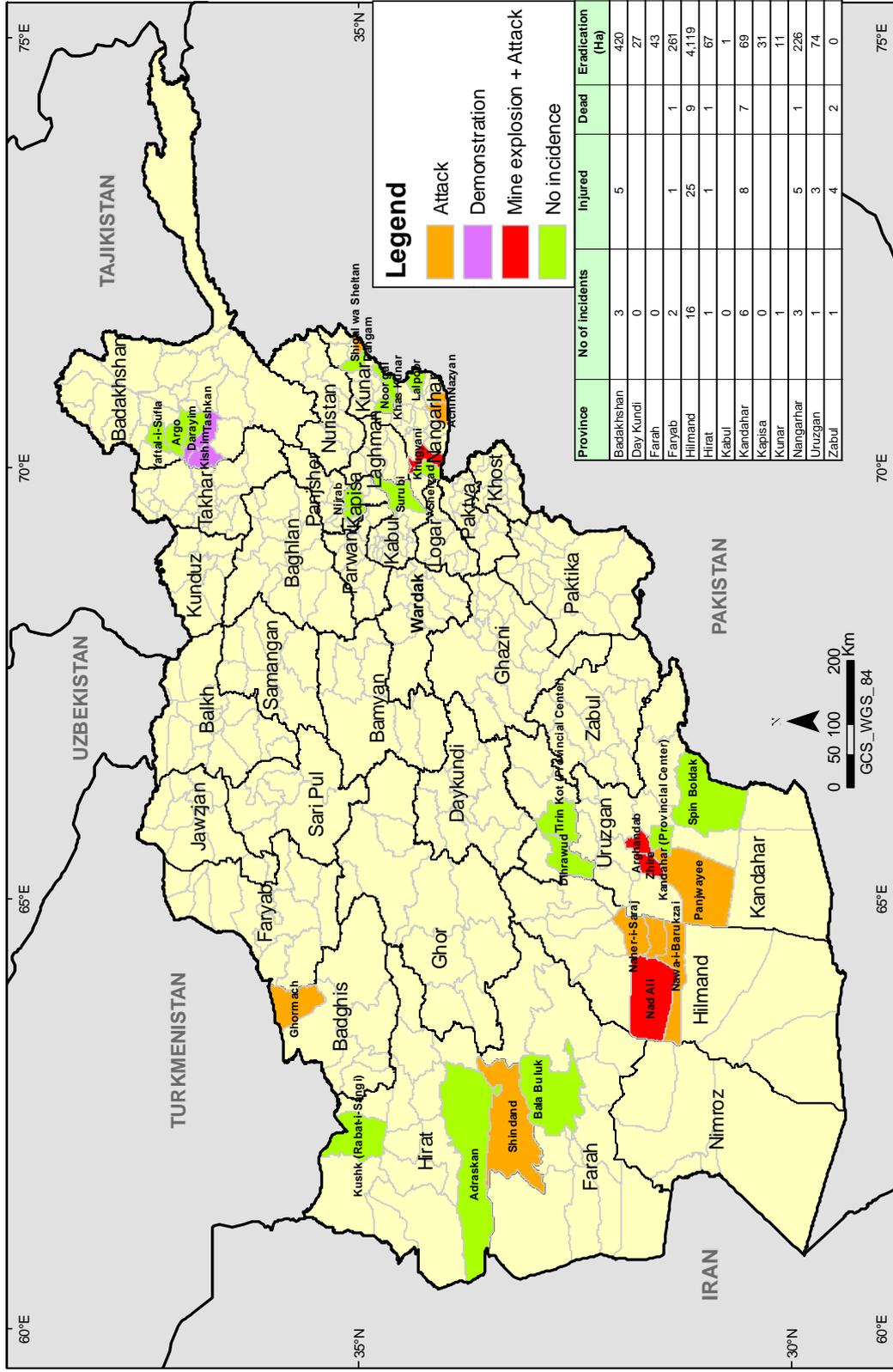
Source: Government of Afghanistan - National monitoring system implemented by UNODC  
 Note: The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations.

Afghanistan: Eradication locations - GLE and PEF, 2009



Source: MGN - UNODC Afghanistan Eradication Survey 2009  
 Note: The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations.

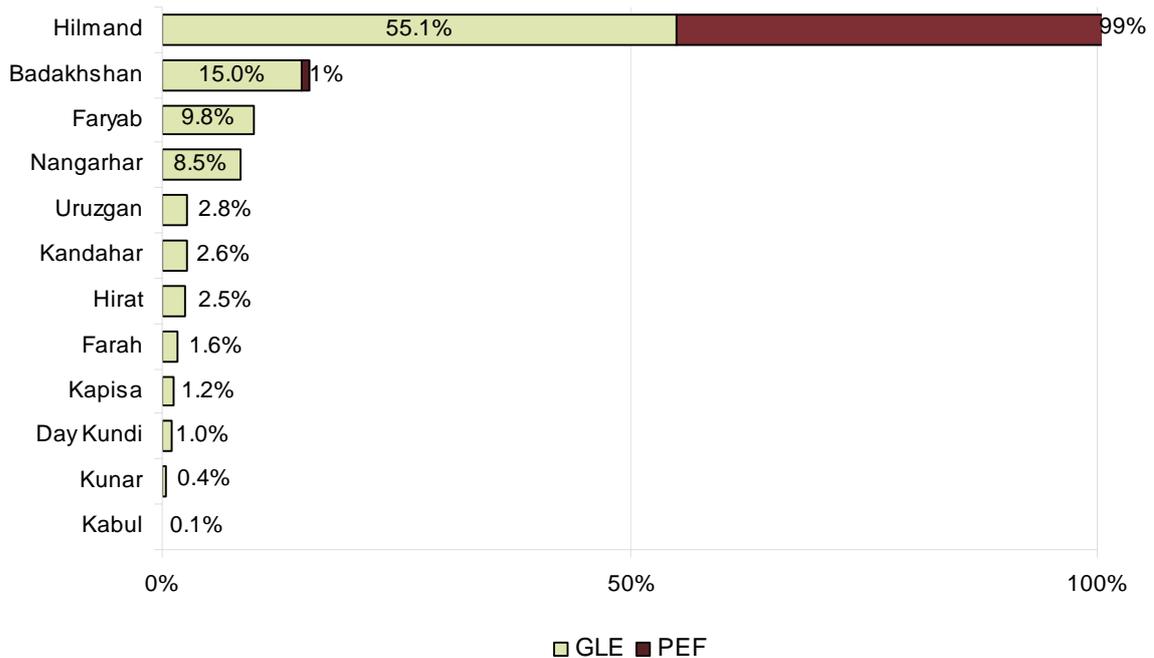
# Afghanistan: Security incidents during eradication, 2009



Source: MCN - UNODC Afghanistan Eradication Survey 2009  
 Note: The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations.

Although the highest eradication of 4,119 ha was reported from Hilmand (1,475 ha GLE and 2,644 PEF eradication), this amount is very low (6%) considering the amount of opium cultivation in this province (69,833 ha). Eradication in Kandahar (69 ha) was negligible in comparison to the total cultivation of 19,811 ha in this province. Eradication in Badakhshan and Nangarhar, however, were 50% and 43% respectively of the total area under opium cultivation in these provinces.

**Figure 9: Distribution of GLE and PEF total eradication by province, 2009**



PEF eradication activities started already in January 2009. The main part of the GLE eradication was carried out in the month of March and efforts continued until June 2009. Manual eradication using sticks was carried out during late flowering to capsule stage in Nangarhar and Badakhshan provinces.

**Opium prices continue to fall in 2009**

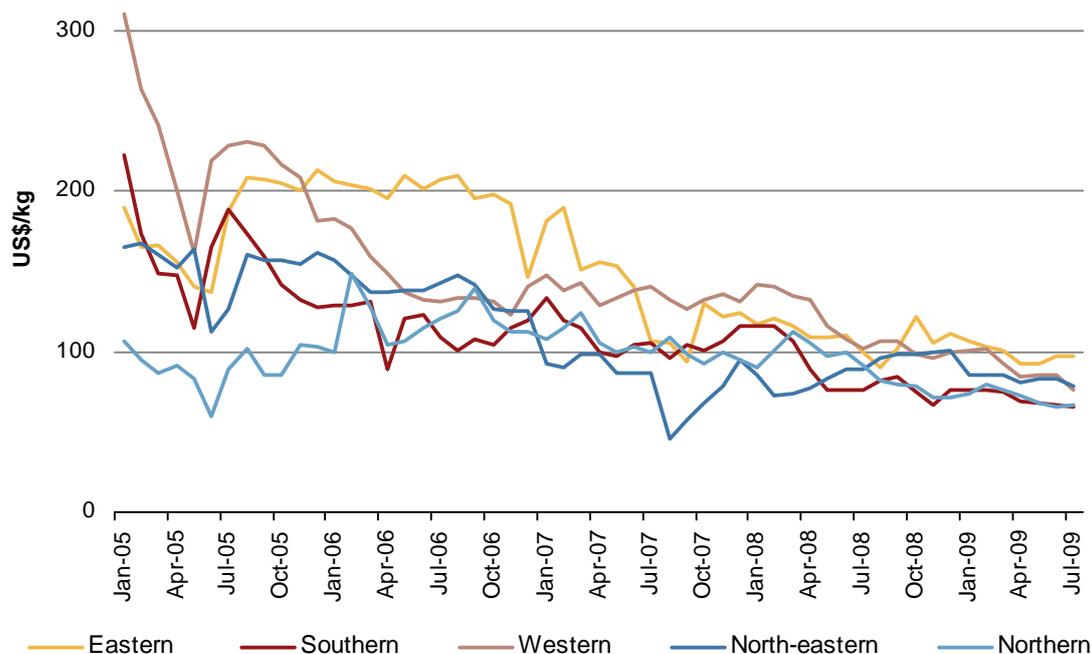
In 2009, the average farm-gate price of dry opium at harvest time (weighted by production) was US\$ 64/kg; 34% lower than in 2008. For the same period, farm-gate prices of fresh opium fell by 31% to US\$ 48/kg (weighted price) at harvest time.<sup>8</sup> These were the lowest prices recorded since 2001.

MCN/UNODC has monitored opium prices on a monthly basis in various provinces of Afghanistan since 1994. Monthly prices have shown a decreasing trend since 2005 in all regions. Since mid-2007, opium prices at the trading level in the Western and Eastern

<sup>8</sup> In 2008, the fresh and dry opium prices at harvest time were based on farmers responses collected through the Annual Opium Survey, which was conducted slightly before the opium harvest. In 2009, prices at harvest time were derived from the opium price monitoring system and refer to the month when opium harvest actually took place in the different regions of the country.

regions tend to be higher than prices in other regions. Since 2005, opium prices have been converging across the different regions of Afghanistan.

**Figure 10: Afghanistan, dry opium prices reported by traders, by region (US\$/kg), January 2005 to July 2009**



**Table 11: Regional farm-gate prices of dry opium at harvest time (US\$/kg), 2008-2009**

Region	Average Dry Opium Price (US\$/kg) 2008	Average Dry Opium Price (US\$/kg) 2009	Change
Central	171	160*	-6%
Eastern	105	90	-14%
North-eastern	85	75	-12%
Northern	97	64	-34%
Southern	70	62	-11%
Western	103	72	-30%
<b>National average price weighted by production**</b>	<b>95</b>	<b>64</b>	<b>-33%</b>

\* Prices for the Central region were taken from the annual village survey as there is no monthly opium price monitoring in the Central region.

\*\* In 2008, the dry opium prices at harvest time were based on farmers responses collected through the Annual Opium Survey, which was conducted slightly before the opium harvest. In 2009, prices at harvest time were derived from the opium price monitoring system and refer to the month when opium harvest actually took place in the different regions of the country.

Lower opium prices in Afghanistan reflect the continuing high levels of opium production, which is thought to exceed global demand for opium and its derivatives in the illicit market. Lower prices were also one of the reasons why some farmers stopped cultivating opium in 2009. Thus, the decrease in opium cultivation in 2009 can be interpreted as a market correction. A 33% drop in the national average opium price is in fact a drastic fall, which makes opium poppy a much less lucrative crop compared to the previous years.

**Total farm-gate value of opium drops by 40% to US\$ 438 million**

Based on potential opium production and reported opium prices, the farm-gate value of the 2009 opium harvest amounted to US\$ 438 million. The farm-gate value of opium as a proportion of GDP decreased in 2009 to 4% compared to 7% in 2008 and 13% in 2007.

**Gross income from opium decreases by 24% to US\$ 3,562 per ha**

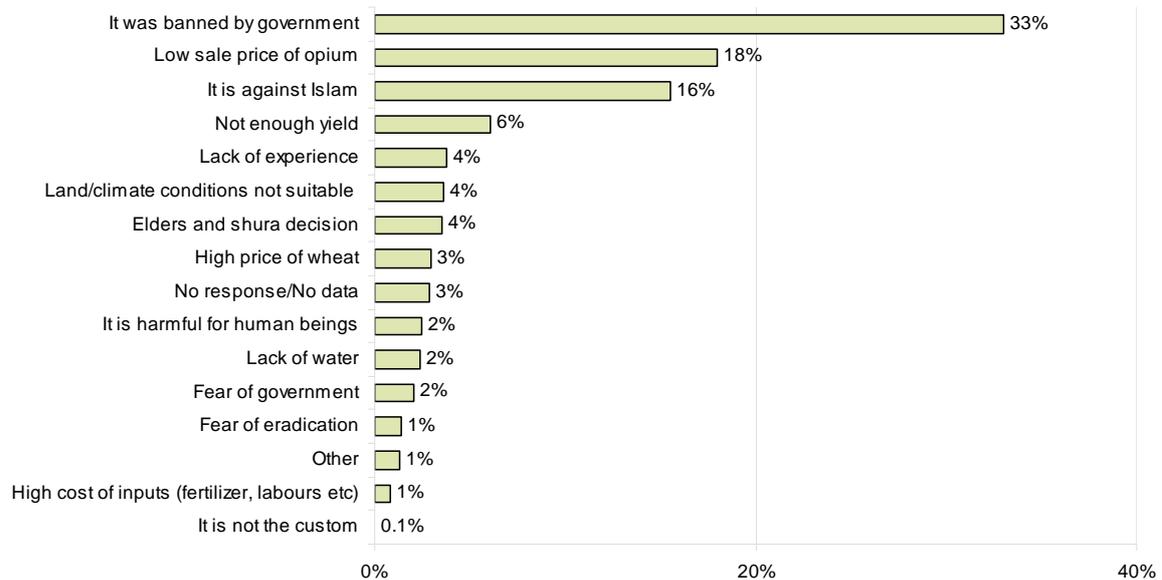
Due to the low price of opium in 2009, the gross income for farmers per hectare decreased by 24% to US\$ 3,562. This was the lowest per hectare income from opium since 2004. At the same time, the per hectare income of wheat was at a relatively high level, albeit lower than in 2008, when wheat prices reached record levels worldwide. Over the last years, the discrepancy between (illicit) gross income from opium and (licit) income from wheat has shrunk considerably, driven by decreasing farm-gate prices for opium and, more recently, by higher wheat prices.

**Table 12: Gross income from opium and wheat (US\$/ha), 2003-2009**

Year	Income in US\$/ha		Ratio opium/wheat income
	Opium	Wheat	
2003	12,700	470	27:1
2004	4,600	390	12:1
2005	5,400	550	10:1
2006	4,600	530	9:1
2007	5,200	546	10:1
2008	4,662	1,625	3:1
2009	3,562	1,101	3:1

In prices of the reporting year, not adjusted for inflation. Income from poppy stalks and seeds and from wheat straw is not considered in this calculation.

**Figure 11: Reasons for stopping opium cultivation in or before 2009 (n=1,877 farmers)**

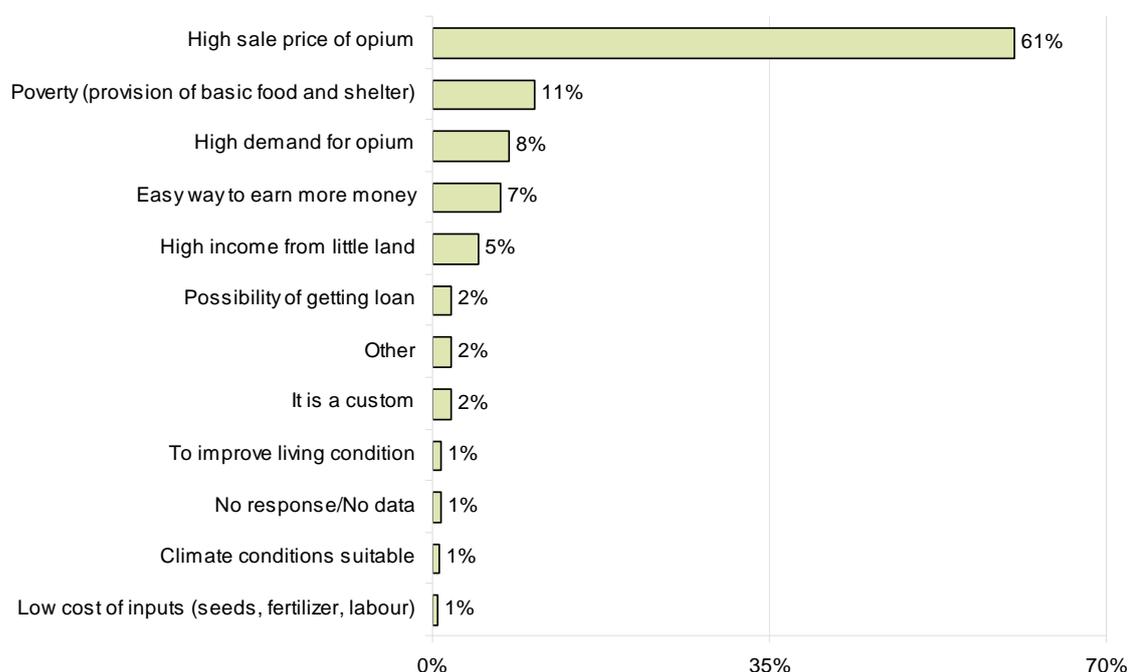


***Reasons for cultivating and/or stopping cultivation***

In 2009, farmers who stopped cultivating opium in 2009 or before were asked about their major reason for doing so. The Government ban on opium cultivation was mentioned by about 33% of the respondents, making it the most frequently cited reason for stopping. Low sale prices of opium were the second main reason. In previous years, low opium prices were mentioned by only a very small percentage of farmers. This provides some evidence for the argument that reduction in opium cultivation is partly a response to market changes.

The high sale price was the most important reason cited by farmers (61%) for cultivating opium poppy in 2009. Provision of basic food and shelter for the family, high demand for opium and the fact that it was an easy way to earn money were other important reasons given.

**Figure 12: Reasons for cultivating opium in 2009 (n=508 farmers in 2009)**



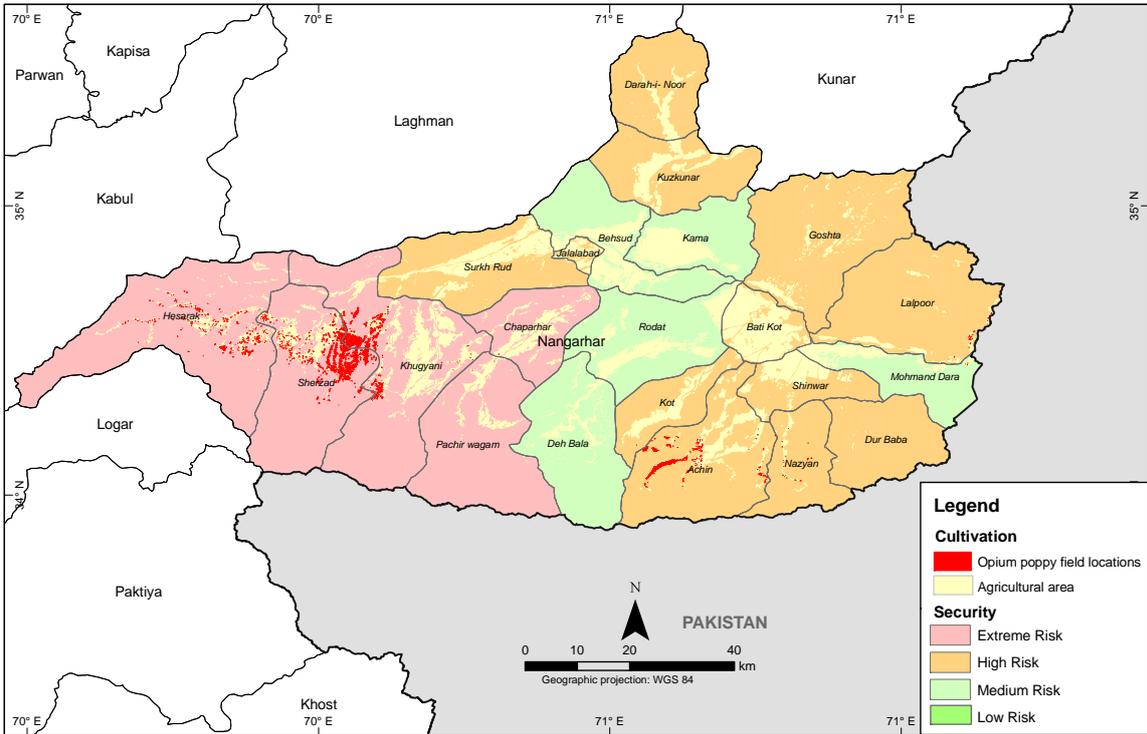
***Strong correlation between lack of security and opium cultivation***

Eighty four per cent of the opium cultivated in 2009 was concentrated in Hilmand, Kandahar, Uruzgan, Day Kundi, and Zabul provinces of the Southern region. These are the most insecure provinces where security conditions are classified as high or extreme risk by the United Nations Department of Safety and Security (UNDSS). Most of the districts in this region were not accessible to the UN and NGOs.

Farah, Nimroz and Badghis, which are insecure province in the Western region, contributed to 15% of cultivation, thus 99% of the total opium cultivation came from the Southern and Western regions. Anti-government elements (AGE) as well as drug traders are very active in the Western region. Provinces in the south are the strongholds of AGEs, while provinces in the west (Farah, Badghis and Nimroz) are known to have organized criminal networks. The link between lack of security and opium cultivation was also evident in Nangarhar province (Eastern region), where cultivation was located in districts classified as having high or extreme security risk.

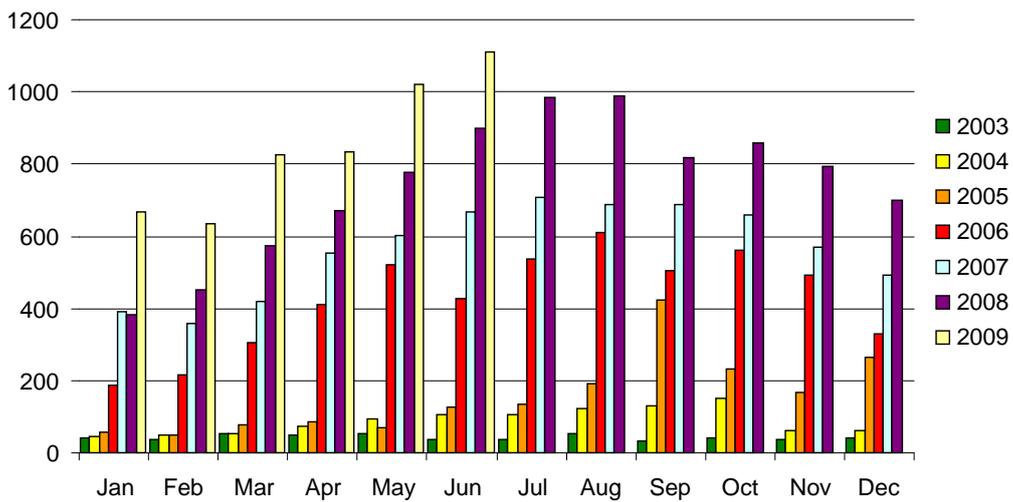
Security incidents in Afghanistan have been on the rise every year since 2003, especially in the south and south-western provinces. The number of security incidents increased sharply in 2006, in parallel with the increase of opium cultivation. 2009 shows further sharp increase in the security incidents.

**Security level (as of 16 July 2009) and opium cultivation in Nangarhar, 2009**



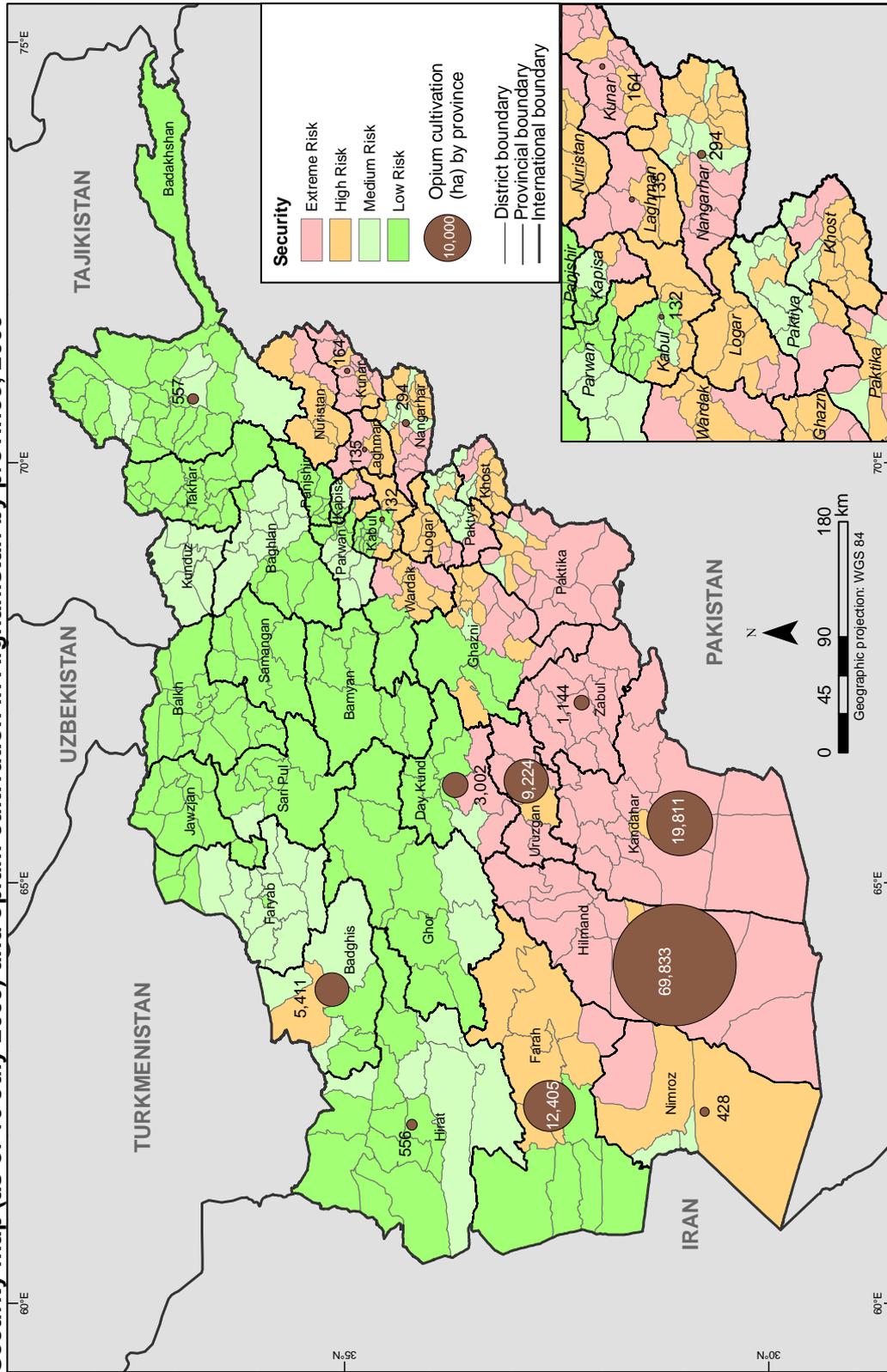
The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations. Source security map: United Nations Department of Safety and Security.

**Figure 13: Number of security incidents by month, January 2003 to June 2009**



Source: United Nations Department of Safety and Security

# Security map (as of 16 July 2009) and opium cultivation in Afghanistan by province, 2009



Source security map: UNODC  
 Source cultivation: Government of Afghanistan - National monitoring system implemented by UNODC  
 Note: The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations

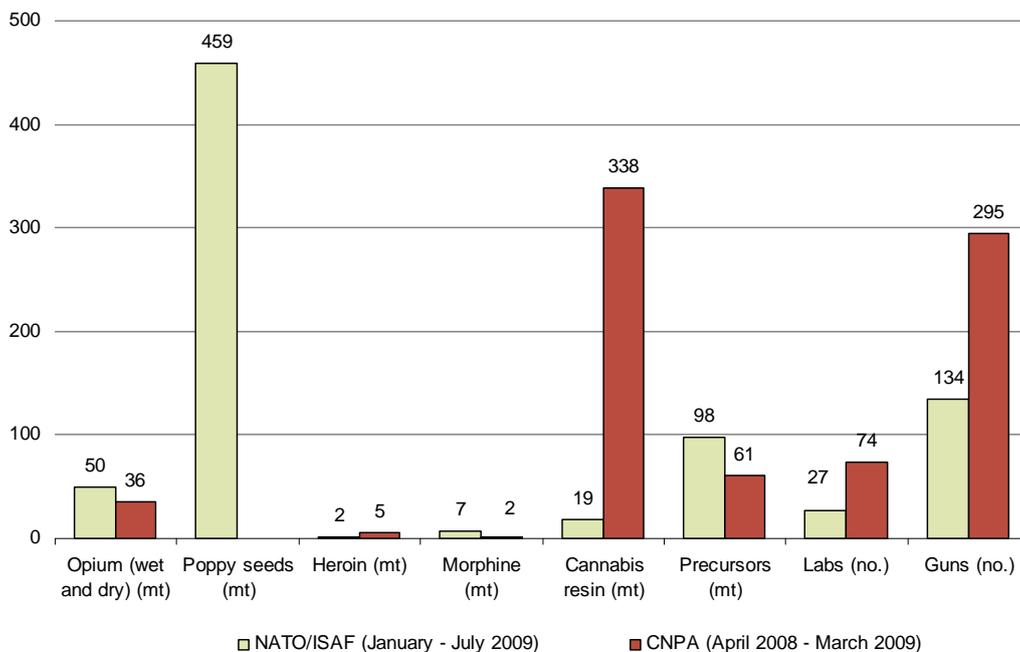
### Role of counter-narcotic activities

The last few months have seen a rise in the number of counter-narcotics activities conducted by national authorities and ISAF. The survey was not specifically designed to estimate the impact of counter-narcotics activities on opium cultivation. It is nonetheless interesting to note that although relatively few of the farmers interviewed had reportedly heard of counter-narcotics activities in their village area, most of those who had were farmers who had stopped growing poppy. Almost none of the poppy farmers, on the other hand, reported they knew of counter-narcotics activities in their area.

Interviews with key informants revealed that it seems to be a rather common occurrence for drug traders to lose a shipment due to counter-narcotics activities. Over half of the informants interviewed had themselves lost a shipment in the last 12 months, and an even higher proportion knew of others who had. Many knew about clandestine laboratories having been destroyed, and often they could recall several instances when laboratories were destroyed by NATO/ISAF and/or ANP. While some thought that the risk of losing a shipment had remained the same in the past 12 months, a large majority of the informants thought it had indeed increased.

In October 2008, based on the request of the Afghan Government, consistent with UN Security Council Resolutions and under ISAF's existing operational plan, NATO Defence Ministers agreed that ISAF could act in concert with Afghan police and army against narcotics facilities and facilitators who support the insurgency. Narcotics facilities/facilitators were defined as all facilities associated with the narcotics industry and those individuals involved in the processing, storing and transporting of illegal narcotics or precursor chemicals that directly support the insurgency.

**Figure 14: Results of counter-narcotics operations as reported by NATO/ISAF and CNPA**



Source: Statistics compiled by ISAF Headquarters, CNPA Annual Report 2008.

Against this background, over the period from April 2008 to July 2009, ISAF/NATO, the Counter Narcotics Police of Afghanistan (CNPA) and other Afghan forces together seized considerable volumes of opiates, poppy seeds, cannabis, precursors and labs (see Figure 14 and Table 13).

**Table 13: Results of counter-narcotics operations as reported by ISAF/NATO, January to July 2009**

Province	Poppy Seed (mt)	Opium (mt)*	Morphine (mt)	Heroin (mt)	Cannabis seed (mt)	Cannabis resin (mt)	Acetic Anhydride (lt)	Other precursors/chemicals (mt)	Labs
Badakhshan		0.03							
Farah	0.60	2.27						0.02	1
Hilmand	456.28	42.81	0.46	0.59		10.95	4,180	91.10	17
Hirat		0.14							
Kandahar	2.03	1.28		0.85	3.99	8.23	900	1.40	1
Nangarhar	0.13	2.67	6.81	0.12		0.18	400	1.41	8
Uruzgan		0.76							
<b>Total</b>	<b>459</b>	<b>50</b>	<b>7</b>	<b>2</b>	<b>4</b>	<b>19</b>	<b>5,480</b>	<b>94</b>	<b>27</b>

\* 80% of the total weight of the seized amount was wet and 20% dry opium.

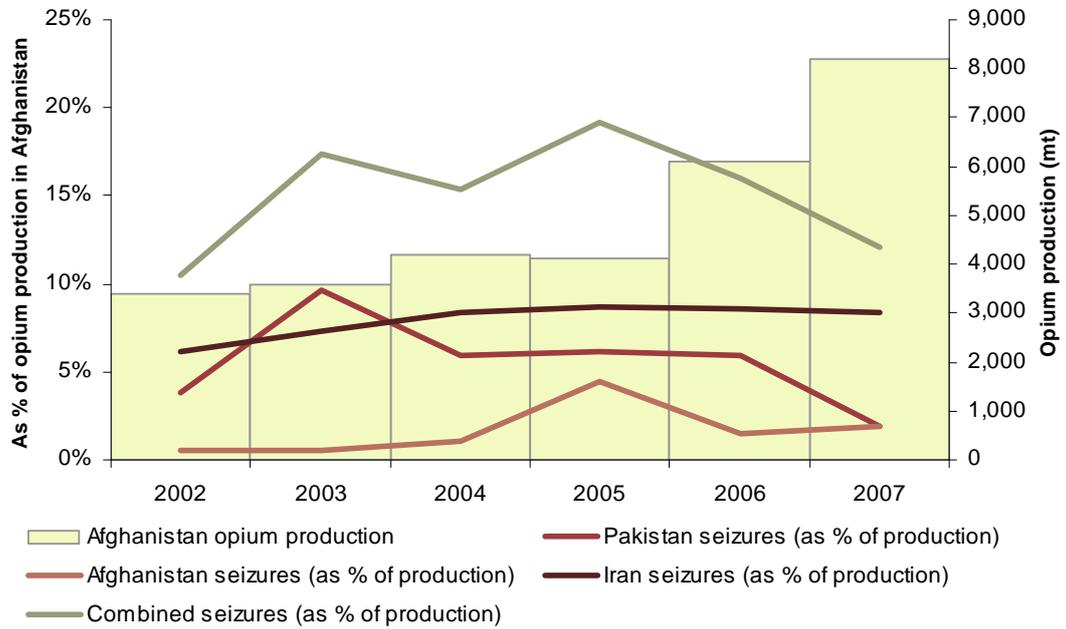
Source: Statistics compiled by ISAF Headquarters.

Combined ISAF/NATO and Afghan forces conducted counter narcotics operations in 7 provinces (namely Badakhshan, Farah, Hilmand, Hirat, Kandahar, Nangarhar, and Uruzgan), mainly focusing on Hilmand and Nangarhar (especially the district of Achin). They destroyed a total of 27 labs, 17 of them in Hilmand and 8 in Nangarhar, corroborating the assumption that a large proportion of the morphine/heroin manufacturing is taking place within Afghanistan.

Twelve laboratories were seized in Sangin district of Hilmand alone, suggesting that this district is crucial for drug traffickers. In addition, large opium seizures at the border of Hilmand with Pakistan indicate high volumes of opium trafficking in this area. The location of laboratories in the most insecure areas of Afghanistan further substantiates the link between insurgency and opiates trade.

Despite this recent success, seizure levels in Afghanistan in terms of proportion of opium production are still very low. Between 2002 and 2007, the proportion of opiates seized in Afghanistan, expressed in opium equivalents and measured as a proportion of annual production in Afghanistan, was usually in the range of 1% or 2 % and never higher than 4%. Preliminary figures for 2008 show a similar picture. The steep increase in opium production in 2006 and 2007 did not lead to correspondingly higher seizures in Afghanistan and Pakistan but did in the I. R. of Iran.

**Figure 15: Opiates seizures in Afghanistan, I. R. of Iran and Pakistan as proportion of Afghan annual opium production, 2002-2007**



Opium, morphine and heroin seizures of unknown purity of opium equivalents. Conversion of morphine/heroin to opium equivalents 1:10.

Source: UNODC, World Drug Report 2009.