



UNODC

United Nations Office on Drugs and Crime



**Islamic Republic of Afghanistan
Ministry of Counter Narcotics**



Afghanistan Opium Survey 2013

Summary findings

NOVEMBER 2013

ABBREVIATIONS

AGE	Anti-Government Elements
GLE	Governor-led eradication
MCN	Ministry of Counter-Narcotics
UNODC	United Nations Office on Drugs and Crime

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PREFACE

Opium poppy cultivation in Afghanistan reached a sobering record high in 2013. According to the 2013 Afghanistan Opium Survey, cultivation amounted to some 209,000 hectares, outstripping the earlier record in 2007 of 193,000 hectares, and representing a 36 per cent increase over 2012.

Moreover, two provinces that had previously been declared poppy-free, Faryab and Balkh in northern Afghanistan, lost this status. All in all, opium production in 2013 went up to some 5,500 tonnes, a 49 per cent increase over 2012.

The hazard this situation poses to health, stability and development, and not only in Afghanistan, is well documented and has been internationally recognized frequently.

At the same time, Afghanistan's counter narcotic institutions, also with the support of UNODC, have taken a significant step forward in terms of capacity and effectiveness. The Ministry of Counter Narcotics has moved quickly to advance policy and guidelines, as per its mandate. The Counter Narcotics Police of Afghanistan is still far from achieving the seizure rate witnessed in other producing countries, but police have nevertheless tripled their effectiveness over recent years to capturing well over 10 per cent of domestic production.

The number of arrests, prosecutions and convictions of powerful figures remains a concern, but progress has also been witnessed with two high profile cases this year. Finally, available services in country to deal with a growing addiction problem have expanded from 30 to 90. These are tangible and hopeful signs of improvement.

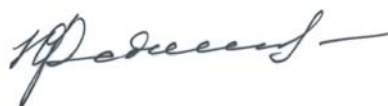
In order to be successful and sustainable, counter-narcotics efforts must finally break out of their insular, silo approach. If the drug problem is not taken more seriously by aid, development and security actors, the virus of opium will further reduce the resistance of its host, already suffering from dangerously low immune levels due to fragmentation, conflict, patronage, corruption and impunity.

What is needed is an integrated, comprehensive response to the drug problem, embedded in a long-term security, development and institution-building agenda.

As we approach 2014 and the withdrawal of international forces from the country, Afghanistan, working with its many friends and allies in a spirit of shared responsibility, must make some very serious choices about the future it desires, and act accordingly. Reigning in the illicit economy, criminality and corruption is essential.



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Fact Sheet, Afghanistan Opium Survey 2013¹

	2012	Change from 2012	2013
Net opium poppy cultivation (after eradication) in hectares (ha)	154,000 ha (125,000–189,000)	36%	209,000 ha (173,000–238,000)
Number of poppy free provinces ²	17	-2	15
Number of provinces affected by poppy cultivation	17	+2	19
Eradication	9,672	-24%	7,348
Average opium yield (weighted by cultivation)	23.7 kg/ha	11%	26.3 kg/ha
Potential production of opium	3,700 (2,800 – 4,200 tons)	49%	5,500 (4,500 - 6,500 tons)
Average farm-gate price (weighted by production) of fresh opium at harvest time	US\$ 163/kg	-12%	US\$ 143/kg
Average farm-gate price (weighted by production) of dry opium at harvest time	US\$ 196/kg	-12%	US\$ 172/kg
Current GDP ³	US\$ 18.95 billion	11%	US\$ 21.04 billion
Total farm-gate value of opium production	US\$ 0.7 billion	31%	US\$ 0.95 billion
In % of GDP	4%		4%
Gross income from opium per ha	US\$ 4,600	-2%	US\$ 4,500

¹ Numbers in brackets indicate the upper and lower bounds of the estimation range.

² Provinces are defined as poppy-free when they are estimated to have less than 100 hectares of opium cultivation.

³ Nominal GDP of the respective year. Source: Government of Afghanistan, Central Statistical Office.

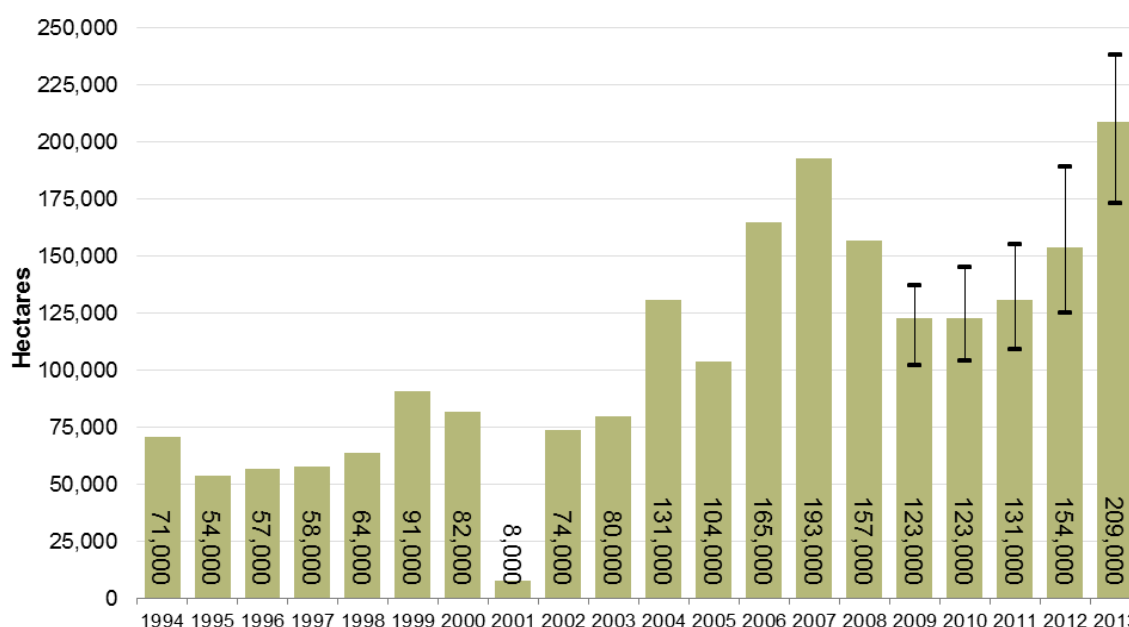
NATIONAL OVERVIEW

Characterized in recent years by strong year-on-year fluctuations, potential opium production in Afghanistan in 2013 was no exception to this pattern. Representing an increase of 49% in comparison to the previous year, the 2013 total of 5,500 tons probably led in turn to a decrease of 12% in the average opium price.

Considering that the total area under opium poppy cultivation in 2013 was 209,000 hectares, over a third more (36%) than in 2012 and a record high, potential opium production could, however, have been greater. Unfavourable weather conditions, particularly in the Western and Southern regions of the country, meant that the 2013 opium yield was adversely affected, but there also appears to be a recurrent pattern, possibly due to a combination of agricultural and ecological factors, in which regions with intense opium poppy cultivation are unable to sustain consistently high opium yields they had in the past.

The high level of opium prices in 2012 was one of the principal factors behind the increase in opium poppy cultivation in 2013, but it may have also been driven by speculation due to the withdrawal of international troops and the forthcoming elections in 2014, which led farmers to try to hedge against the country's uncertain political future. Whether or not that was the case, the increase in cultivation was mainly confined to the habitual main poppy-growing areas in the Southern and Western regions of the country.⁴

Figure 1: Opium cultivation in Afghanistan, 1994-2013 (Hectares)



Source: UNODC (1994-2002), MCN/UNODC (since 2003). The high-low lines represent the upper and lower bounds of the 95% confidence interval.

While the total number of poppy-free provinces in the country fell from 17 to 15 in 2013, of those two provinces (Faryab and Balkh in the Northern region), Faryab only lost its poppy-free status by the smallest of margins (58 hectares). With relatively little effort, its poppy-free status could thus be regained.

⁴ Regions as designated by UNODC for analytical purposes. Please refer to table 1 for a full list.

The vast majority (89%) of total opium poppy cultivation in 2013 took place in nine provinces in Afghanistan's Southern and Western regions, which include the most insecure provinces in the country. Cultivation increased by 34% in Hilmand province, Afghanistan's principal poppy-cultivating province since 2004, and (by 16% in Kandahar, which was the second largest opium-cultivating province in Afghanistan with 28,335 hectares or 14% of total opium cultivation in 2013).

Opium poppy cultivation also increased in most of the country's other main opium poppy-growing provinces in 2013, including Nangarhar and Nimroz. Cultivation increased five fold in comparison to its 2102 level in Nangarhar in the Eastern region, where it also increased in Laghman province by 41% and in Kapisa by 101%. However, the Eastern region only accounted for 9% of national total of opium cultivation in 2013.

Badakhshan, the only opium-cultivating province in the North-eastern region, experienced an increase in opium cultivation of 23% despite the eradication of 2,798 hectares. In Kabul, the Central region's only opium-cultivating province, opium cultivation increased by 148% between 2012 and 2013. There was no eradication in Kabul province in 2013 and opium poppy eradication across the whole of Afghanistan decreased by 24% to 7,348 hectares in 2013.

The link between insecurity and opium cultivation observed in the country since 2007 continued to exist in 2013, as witnessed by the fact that the vast majority of opium cultivation remained confined to the country's Southern and Western provinces, which are dominated by insurgency and organized criminal networks.

Table 1: Main opium-cultivating provinces in Afghanistan, 2007-2013 (Hectares)

Province	2008	2009	2010	2011	2012	2013	Change 2012-2013	2013 (ha) as % of total
Hilmand	103,590	69,833	65,045	63,307	75,176	100,693	34%	48%
Kandahar	14,623	19,811	25,835	27,213	24,341	28,335	16%	14%
Farah	15,010	12,405	14,552	17,499	27,733	24,492	-12%	12%
Nimroz	6,203	428	2,039	2,493	3,808	16,252	327%	8%
Nangarhar	Poppy-free	294	719	2,700	3,151	15,719	399%	8%
Uruzgan	9,939	9,224	7,337	10,620	10,508	9,880	-6%	5%
Badghis	587	5,411	2,958	1,990	2,363	3,596	52%	2%
Badakhshan	200	557	1,100	1,705	1,927	2,374	23%	1%
Day Kundi	2,273	3,002	1,547	1,003	1,058	1,536	45%	1%

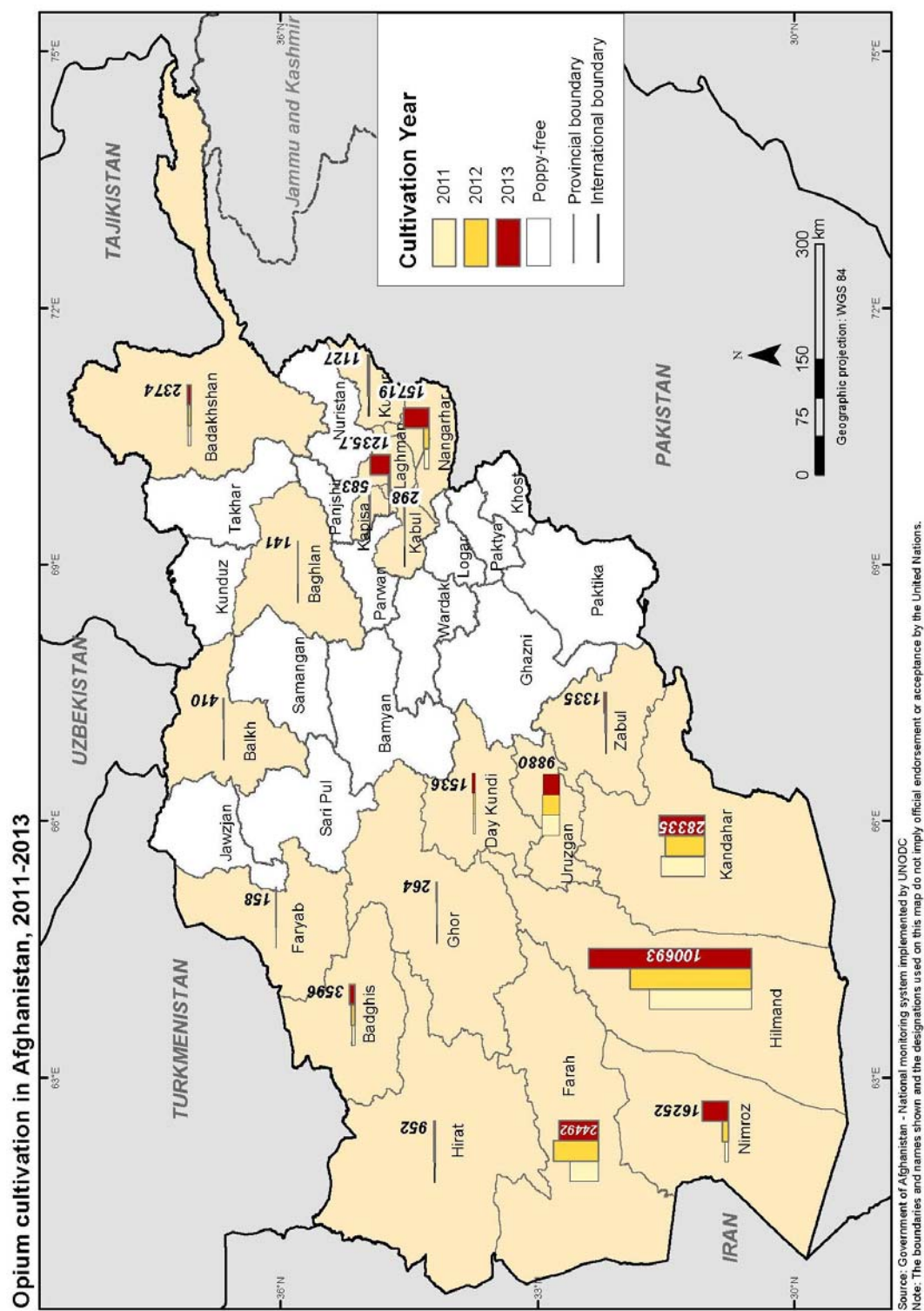
Table 2: Opium cultivation (2008-2013) and eradication (2012-2013) in Afghanistan (Hectares)

Province/Region	Cultivation 2008 (ha)	Cultivation 2009 (ha)	Cultivation 2010 (ha)	Cultivation 2011 (ha)	Cultivation 2012 (ha)	Cultivation 2013 (ha)	Change 2012-2013 (%)	Eradication 2012 (ha)	Eradication 2013 (ha)
Kabul	310	132	152	220	120	298	148%	103	0
Ghazni	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Khost	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Logar	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Paktika	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Paktya	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Panjshir	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Parwan	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Wardak	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Central Region	310	132	152	220	120	298	148%	103	0
Kapisa	436	Poppy-free	Poppy-free	181	290	583	101%	54	11
Kunar	290	164	154	578	1,279	1,127	-12%	70	108
Laghman	425	135	234	624	877	1,236	41%	76	20
Nangarhar	Poppy-free	294	719	2,700	3,151	15,719	399%	784	157
Nuristan	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Eastern Region	1,151	593	1,107	4,082	5,596	18,665	234%	985	296
Badakhshan	200	557	1,100	1,705	1,927	2,374	23%	1,784	2,798
Takhar	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	60
Kunduz	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
North-eastern R.	200	557	1,100	1,705	1,927	2,374	23%	1,784	2,858
Baghlan	475	Poppy-free	Poppy-free	161	177	141	-20%	252	34
Balkh	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	410	NA	0	80
Bamyan	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Faryab	291	Poppy-free	Poppy-free	145	46	158	0%	50	7
Jawzjan	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Samangan	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Sari Pul	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Northern Region	766	Poppy-free	Poppy-free	305	223	710	218%	302	121
Day Kundi*	2,273	3,002	1,547	1,003	1,058	1,536	45%	236	9
Hilmand	103,590	69,833	65,045	63,307	75,176	100,693	34%	3,637	2,162
Kandahar	14,623	19,811	25,835	27,213	24,341	28,335	16%	922	1,083
Uruzgan*	9,939	9,224	7,337	10,620	10,508	9,880	-6%	485	352
Zabul	2,335	1,144	483	262	424	1,335	215%	88	0
Southern Region	132,760	103,014	100,247	102,405	111,507	141,779	27%	5,368	3,606
Badghis	587	5,411	2,958	1,990	2,363	3,596	52%	53	3
Farah**	15,010	12,405	14,552	17,499	27,733	24,492	-12%	316	262
Ghor	Poppy-free	Poppy-free	Poppy-free	Poppy-free	125	264	111%	11	6
Hirat	266	556	360	366	1,080	952	-12%	600	77
Nimroz**	6,203	428	2,039	2,493	3,808	16,252	327%	148	120
Western Region	22,066	18,800	19,909	22,348	35,109	45,557	30%	1,130	468
Total (rounded)	157,000	123,000	123,000	131,000	154,000	209,000	36%	9,672	7,348

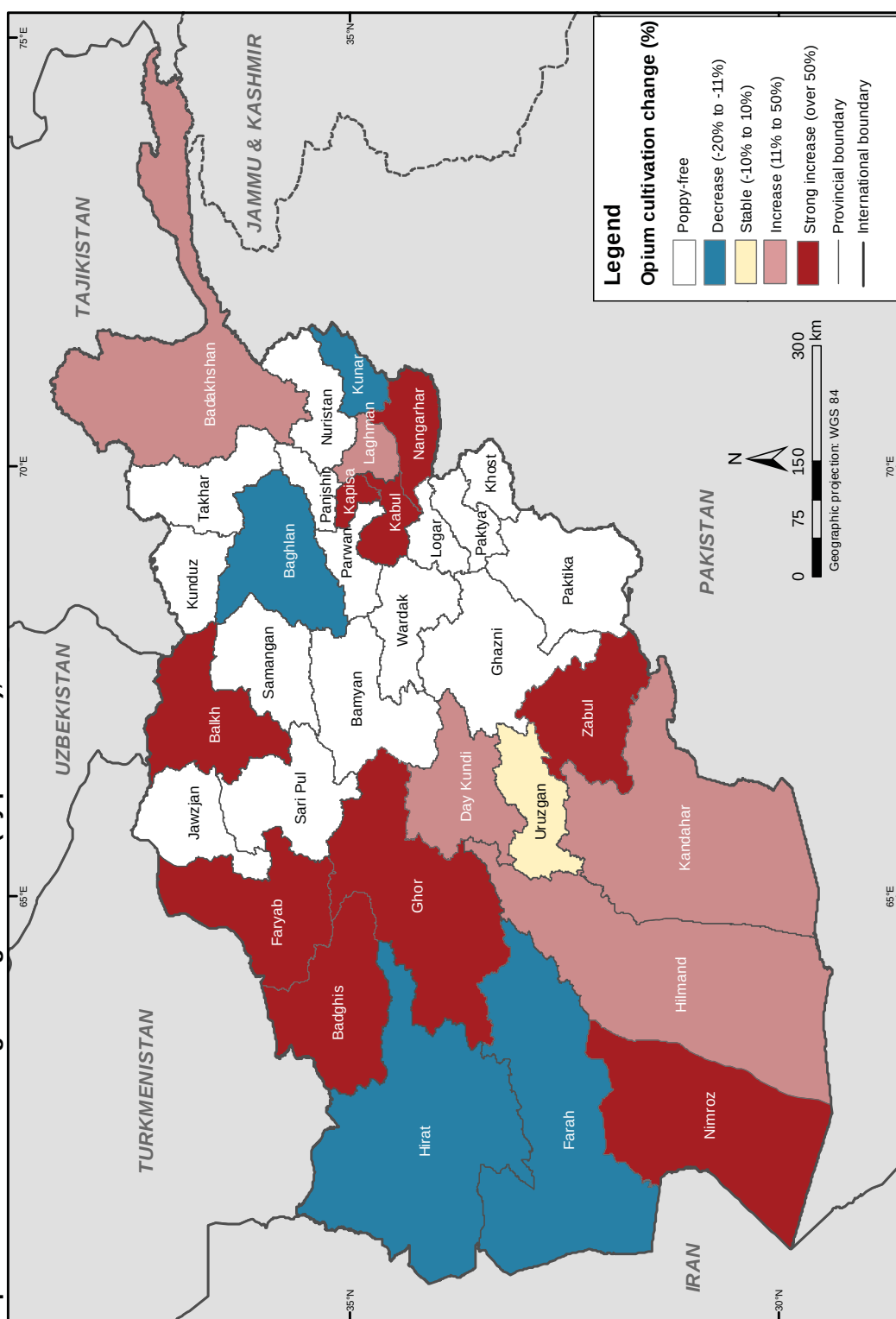
Provinces are defined as poppy-free when they are estimated to have less than 100 hectares of opium cultivation.

* In 2013, Gizab district of Day Kundi province was under the temporary administrative authority of the governor of Uruzgan province who carried out 22 hectares of eradication in that district. For eradication reporting, these 22 hectares were included in the 352 hectares of eradication reported for Uruzgan. For calculating the net poppy cultivation, however, the official provincial boundaries were used, i.e. with Gizab being part of Day Kundi province.

** Estimates for Farah and Nimroz in 2012 and 2013 are not comparable due to administrative boundary changes. For 2013, the Dilaram area, previously a district of Farah province, was reintegrated into Nimroz province. This reversed a boundary change that happened in 2009, when the Dilaram area, which had been part of Nimroz before, was moved into Farah province.



Opium cultivation change in Afghanistan (by province), 2012-2013



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.

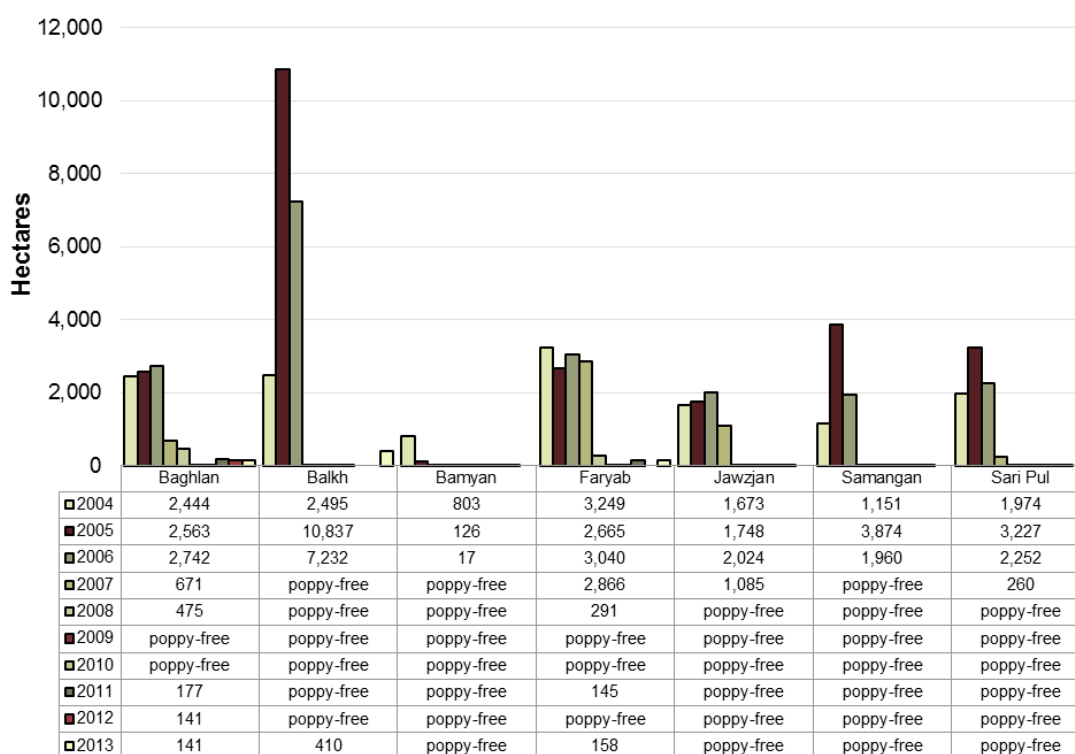
Poppy-free provinces

The number of poppy-free provinces decreased from 17 in 2012 to 15 in 2013, as Balkh and Faryab provinces in the Northern region lost their poppy-free status. However, the level of cultivation in Faryab and Baghlan remained very low (158 and 141 hectares, respectively) and only slightly above the 100-hectare threshold that defines poppy-free status. Out of the 17 poppy-free provinces in 2012, 15 continued to be poppy-free in 2013.

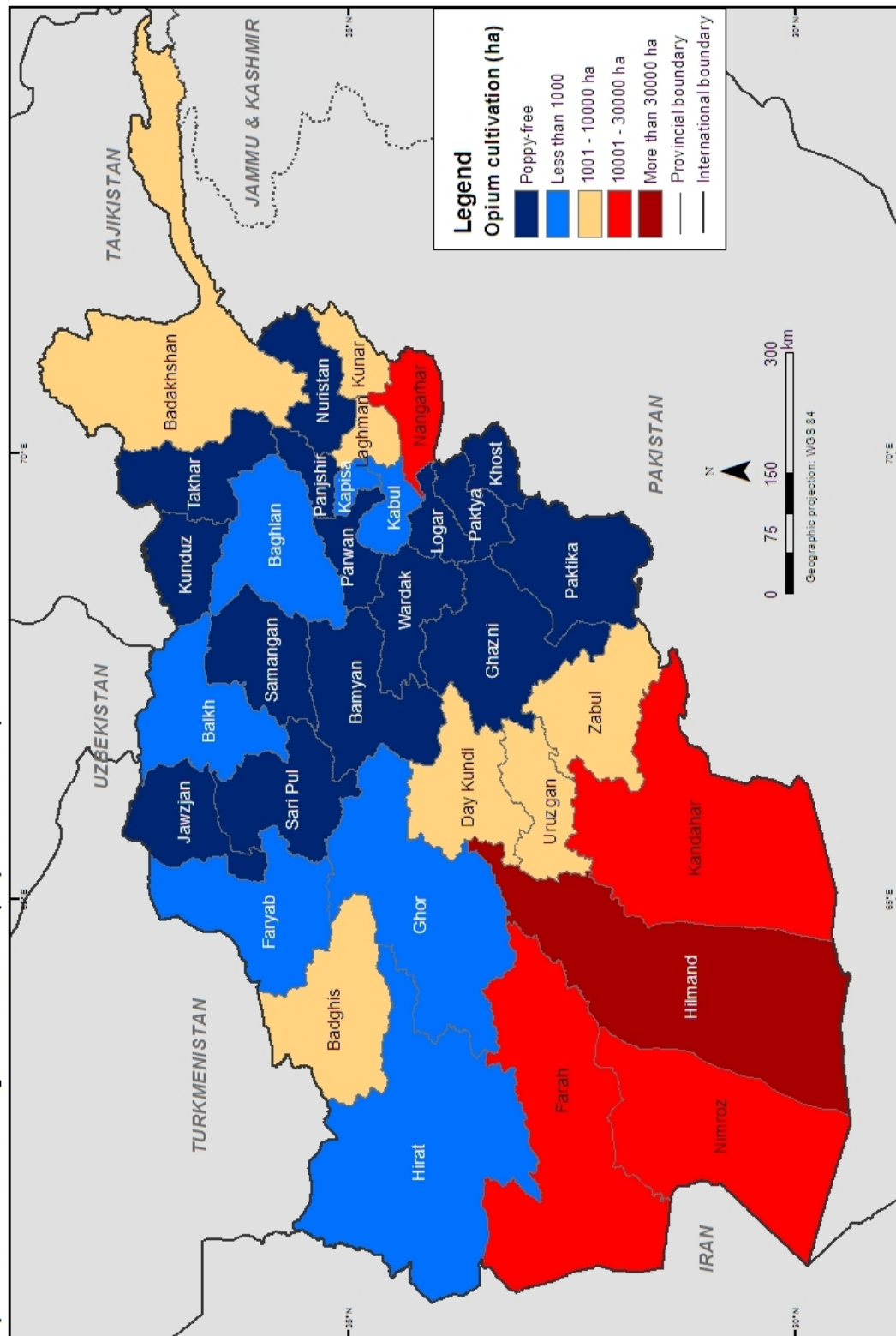
Table 3: Provinces with poppy-free status in 2013 (<100 hectares of opium poppy cultivation)

Region	Province
Central region	Khost, Logar, Paktya, Paktika, Panjshir, Parwan, Wardak, Ghazni
Northern region	Bamyan, Jawzjan, Samangan, Sari Pul
North-eastern region	Kunduz, Takhar
Eastern region	Nuristan

Figure 2: Opium poppy cultivation in the Northern region, by province, 2004-2013 (Hectares)



Opium cultivation in Afghanistan, 2013 (at province level)

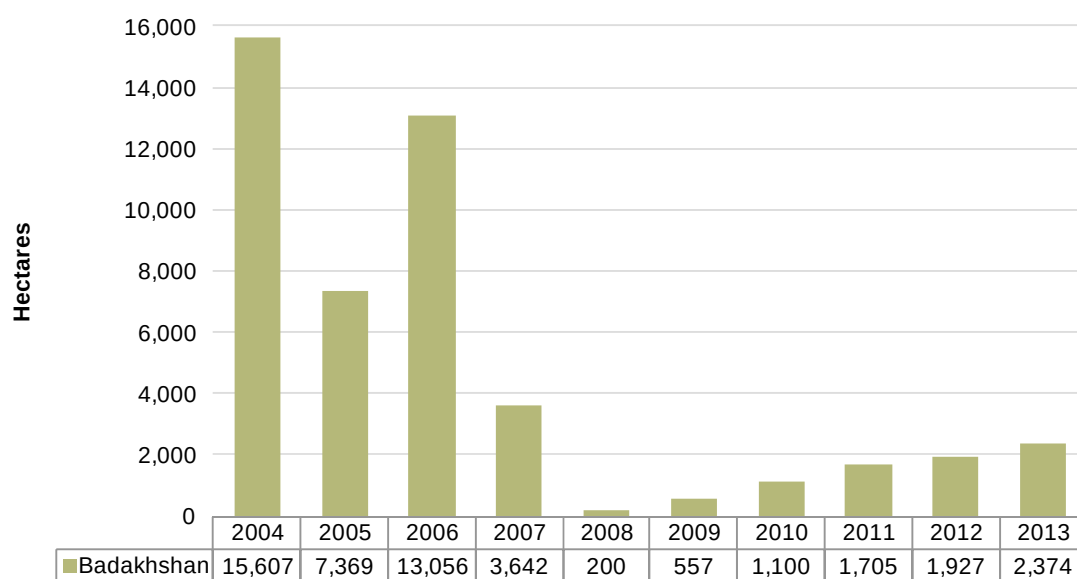


Regional breakdown

North-eastern region – Badakhshan remained the only opium poppy-cultivating province

Since 2009, Badakhshan, where most opium cultivation takes place in rain-fed areas, has been the only poppy-cultivating province in the North-eastern region. The region's other two provinces, Kunduz and Takhar, have been poppy-free since 2007 and 2008, respectively. In comparison to poppy-cultivating provinces in the Southern and Western regions of Afghanistan, at 2,374 hectares, opium cultivation in Badakhshan remained low in 2013. However, it did represent an increase of 23% compared to 2012 and happened despite the eradication of 2,798 hectares of opium poppy in 2013.

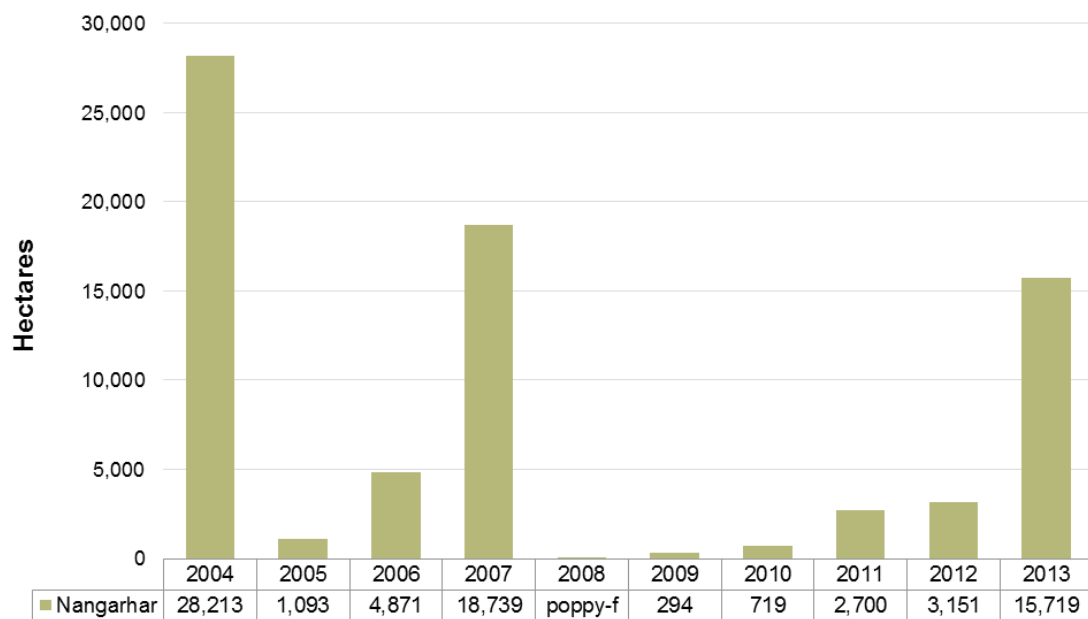
Figure 3: Opium poppy cultivation in Badakhshan province, 2004-2013 (Hectares)



Eastern region – Nangarhar remained the principal opium-cultivating province and cultivation continued to increase

Poppy-free in 2008, Nangarhar province saw its opium cultivation subsequently increase five-fold to 15,719 hectares by 2013, which was almost back to its pre-poppy-free 2007 level. In 2013, only 157 hectares of opium poppy cultivation were eradicated in Nangarhar province.

Figure 4: Opium cultivation in Nangarhar province, 2004-2013 (Hectares)



Kapisa, Kunar and Laghman

Poppy-free in 2009 and 2010, Kapisa province saw opium cultivation increase by 101% in 2013, to 583 hectares from 290 hectares in 2012. The amount of poppy eradicated in Kapisa province in 2013 was very small (only 3 hectares).

In Kunar province, there was a decrease of 12% in opium cultivation, from 1,279 hectares in 2012 to 1,127 hectares in 2013. In 2010, Kunar province was very close to being poppy-free due to its negligible level of cultivation (154 hectares), but opium cultivation has increased continuously since then.

In Laghman province, there was a significant increase (41%) in opium cultivation, from 877 hectares in 2012 to 1,236 hectares in 2013. Only a small amount of poppy cultivation was eradicated in Kunar and Laghman provinces in 2013.

Western region – Farah remained the largest opium poppy-cultivating province

Due to administrative boundary changes, the 2013 estimates for Farah and Nimroz were calculated considering Dilaram district, previously the main opium cultivating district in Farah, as being part of Kash Rod district in Nimroz province. Therefore, the estimates for Farah and Nimroz in 2012 and 2013 are not directly comparable. In 2013, the area under opium cultivation in Farah province was 24,492 hectares, with a total of 262 hectares of opium poppy cultivation being eradicated in 2013.

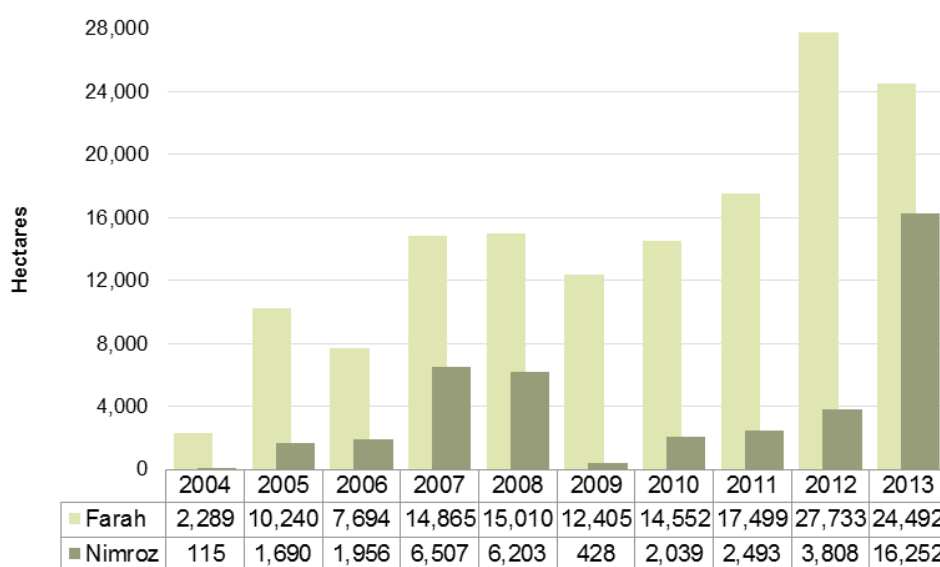
Opium cultivation in Farah province has often been irregular. In 2008 it reached its highest level (15,010 hectares), whereas there was a 17% decrease in 2009 before it increased by 17% in 2010, when it reached almost the same level as in 2008. In 2011 and 2012, it underwent a further increase of 20% and 58% (17,499 hectares and 27,733 hectares).

Nimroz province remained the second largest opium cultivating province in the Western region in 2013, with 16,252 hectares under cultivation. An increase of 327% compared to 2012, this

significant increase was mainly due to the aforementioned boundary changes. The quantity of opium eradicated (120 hectares) in Nimroz province was negligible when compared to total opium cultivation in 2013.

Indicative district estimates point to an area of about 11,000 hectares of poppy cultivation in Dilaram district. Even though no exact estimates can be provided, it is safe to say that Farah would have experienced a strong increase in poppy cultivation when comparing the same area in 2012 and 2013 and that the reported decrease is only due to administrative boundary changes. Nimroz provinces would still have observed an increase in poppy cultivation if the province boundaries would have stayed the same but to a much smaller extent.

Figure 5: Opium cultivation in Farah and Nimroz provinces, 2004-2013 (Hectares)



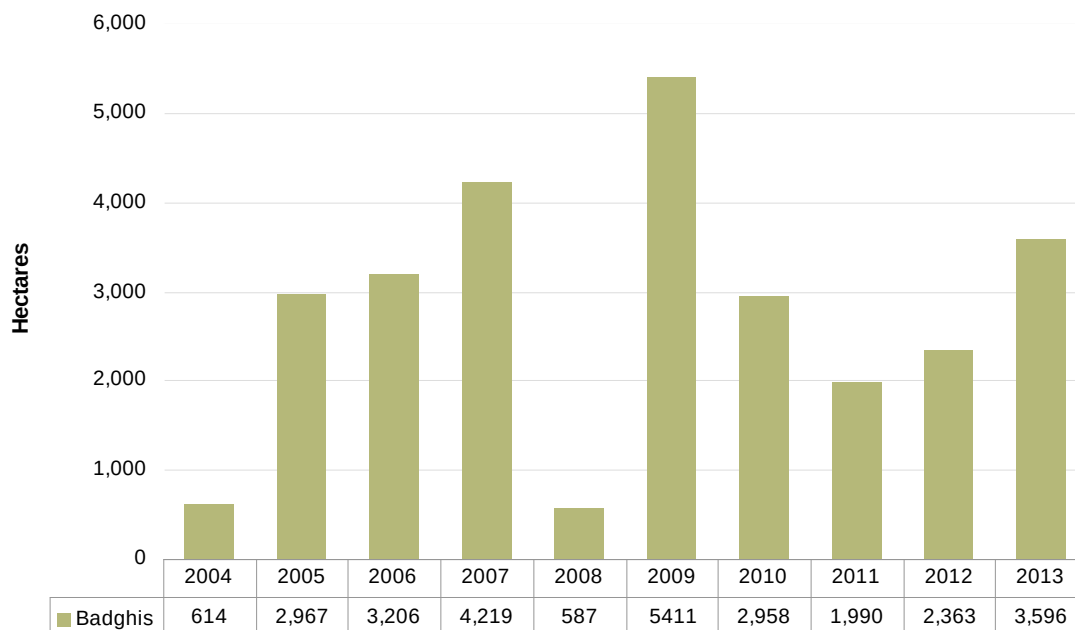
Note: Estimates for Farah and Nimroz in 2012 and 2013 are not comparable due to administrative boundary changes. For 2013, the Dilaram area, previously a district of Farah province, was reintegrated into Nimroz province. This reversed a boundary change that happened in 2009, when the Dilaram area, which had been part of Nimroz before, was moved into Farah province.

Opium poppy cultivation increased in Badghis and decreased in Hirat

With a total of 3,596 hectares in 2013 as opposed to 2,363 hectares in 2012, there was an increase of 52% in opium cultivation in Badghis province, where opium cultivation is often driven by the availability of rain water. In 2009, good rainfall resulted in extensive cultivation in rain-fed areas, whereas opium cultivation decreased by 45% to 2,958 hectares in 2010 and there was a further decrease (33%) in opium cultivation (1,990 hectares) in 2011. Since then, opium cultivation in Badghis has been on the increase.

With 952 hectares in 2013 as opposed to 1080 hectares in 2012, opium poppy cultivation in Hirat province decreased by 12%. A total of 77 hectares of Governor-led eradication was verified in Hirat province in 2013.

Figure 6: Opium cultivation in Badghis province, 2004-2013 (Hectares)



Southern region – Opium cultivation increased by 34% in Hilmand and 16% in Kandahar

With 68% of the country’s opium cultivation in 2013, the Southern region remained the largest opium poppy-cultivating region in Afghanistan. From 75,176 hectares in 2012 to 100,693 hectares in 2013, opium cultivation increased by 34% in Hilmand province, which remained the country’s principal opium-cultivating province in 2013, with 48% of total opium cultivation.

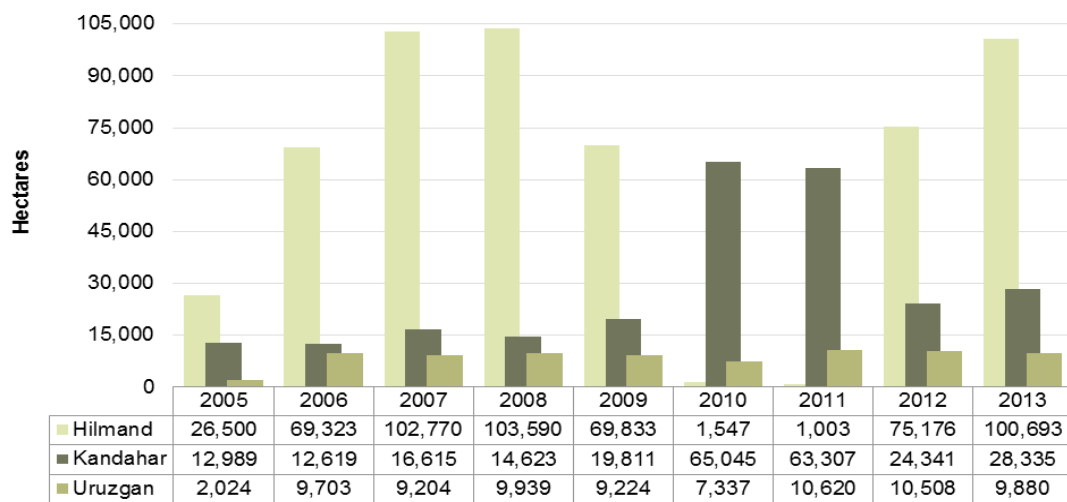
Although the “Food Zone” programme in Hilmand province came to an end in 2012, as it is important to continue to evaluate the long-term effects of this counter narcotics strategy, a separate estimate for opium cultivation in the Food Zone was also calculated in 2013. While opium cultivation in the Food Zone increased by 50% in 2013 (from 24,241 hectares in 2012 to 36,244 hectares), representing roughly a fifth of the Food Zone’s total agricultural area, outside the Food Zone the extent of poppy cultivation was far greater. More than a third of available land outside the Food Zone was under poppy cultivation, showing that despite the increase following the end of the programme, opium cultivation was still relatively smaller inside the Food Zone than outside it.

A total of 2,162 hectares of Governor-led eradication was verified in Hilmand province in 2013, which accounted for only 2% of estimated opium cultivation in the province.

In Kandahar province, Hilmand’s neighbour to the east, opium cultivation increased by 16% in 2013 (from 24,341 hectares in 2012 to 28,335 hectares), reinstating Kandahar as Afghanistan’s second largest opium cultivating province after it dropped to third position in 2012.

Opium cultivation in Uruzgan province witnessed a slight decrease of 6% in 2013 compared to 2012 (from 10,508 hectares to 9,880 hectares), but its level of opium poppy cultivation has remained rather stable since 2011.

Figure 7: Opium cultivation in Hilmand, Kandahar and Uruzgan provinces, 2005-2013 (Hectares)



The sampling procedure in Kandahar was improved in 2012. Therefore, 2012 estimates are only comparable to previous estimates to a limited extent.

Table 4: Regional distribution of opium cultivation, 2012-2013 (Hectares)

Region	2012	2013	Change 2012-2013 (%)	2012 (ha) as % of total	2013 (ha) as % of total
Southern	111,507	141,779	+27%	72%	68%
Western	35,109	45,557	+30%	23%	22%
Eastern	5,596	18,665	+234%	4%	9%
North-eastern	1,927	2,374	+23%	1%	1%
Central	120	298	148%	0.1%	0.1%
Northern	223	710	218%	0.1%	0.3%
Rounded Total	154,000	209,400	+36%	100%	100%

Potential opium production increased in 2013

In 2013, estimated potential opium production in Afghanistan amounted to 5,500 tons (4,500 - 6,500 tons), an increase of 49% compared to its 2012 level (3,700 tons), whereas average opium yield amounted to 26.3 kilograms per hectare in 2013, some 11% more than in 2012 (23.7 kilograms per hectare). The increase in production was mainly the result of an increase in opium cultivation. As in the previous year, adverse weather conditions in parts of the Western and Southern regions affected poppy plants, thereby reducing the yield in comparison to the relatively unaffected 2011 season.

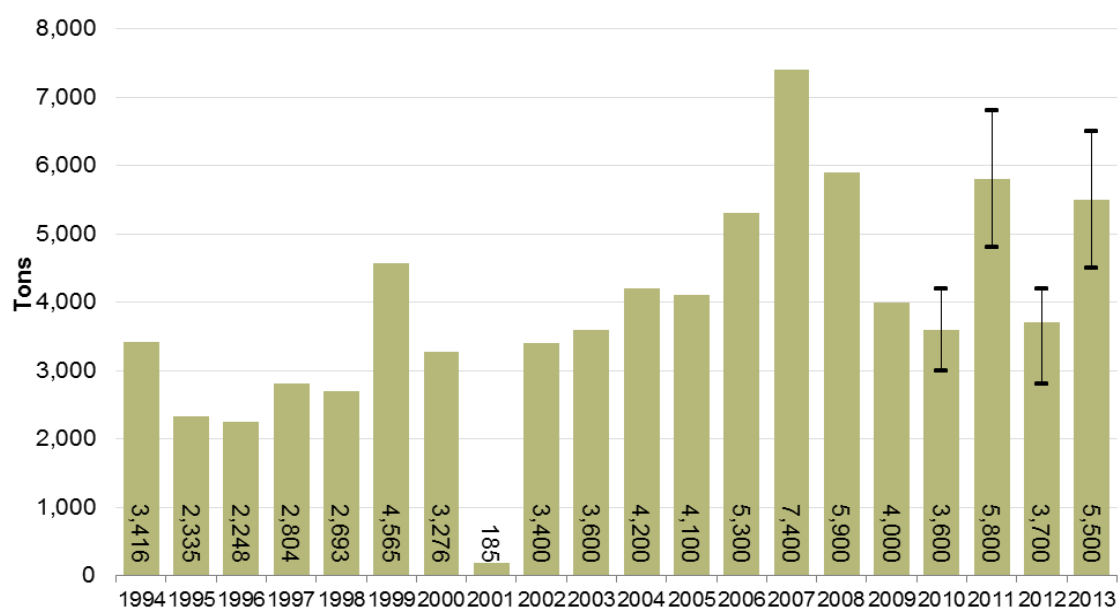
The yield survey undertaken by UNODC captured the effects of the adverse weather conditions at least partially. In the Southern region, for example, the yield survey showed a reduction of more than 50% compared to 2011, though even greater reductions may have occurred in some parts of those regions.

Despite the reduced yield, the Southern region continued to produce the vast majority of opium in Afghanistan in 2013, representing 60% of national production. The Western region was the country's second most important opium-producing region (22%).

Table 5: Potential opium production by region, 2012-2013 (Tons)

Region	Production 2012	Production 2013	Change 2012-2013 (%)
Central	4	14	261%
Eastern	216	842	290%
North-eastern	86	102	18%
Northern	7	25	252%
Southern	2,520	3,293	31%
Western	824	1,224	48%
Total (rounded)	3,700	5,500	49%

Figure 8: Potential opium production in Afghanistan, 1994-2013 (Tons)



Source: UNODC (1994-2002), MCN/UNODC (since 2003). The high-low lines represent the upper and lower bounds of the 95% confidence interval.

Poppy Eradication decreased by 24% in 2013

A total of 7,348 hectares of verified poppy eradication was carried out by the Governors in 2013, representing a decrease of 24% compared to 2012 when 9,672 hectares of Governor-led poppy eradication (GLE) was verified by MCN/UNODC in the same 18 provinces as in 2013. The final eradication figures in Badakhshan, Balkh, Baghlan, Farah, Faryab, Hirat, Hilmand, Nimroz, Kandahar, Kapisa, Laghman, Nangarhar, Uruzgan and Kunar provinces were corrected after verification with satellite images.

Table 6: Eradication and opium cultivation in Afghanistan 2005-2013 (Hectares)

Year	2005	2006	2007	2008	2009	2010	2011	2012	2013
Governor-led Eradication (GLE), (ha)	4,000	13,050	15,898	4,306	2,687	2,316	3,810	9,672	7,348
Poppy Eradication Force (PEF), (ha) *	210	2,250	3,149	1,174	2,663	0	0	0	0
Total (ha)	4,210	15,300	19,510	5,480	5,351	2,316	3,810	9,672	7,348
Cultivation (ha) **	104,000	165,000	193,000	157,253	119,141	123,000	131,000	154,000	209,000
% poppy in insecure provinces of South and West	56%	68%	80%	98%	99%	95%	95%	95%	89%
Poppy-free provinces	8	6	13	18	20	20	17	17	15
Number of provinces eradication carried out	11	19	26	17	12	11	18	18	18

* The activities of the Poppy Eradication Force (PEF) were discontinued after 2009.

** Net opium cultivation after eradication

Major observations on 2013 and 2012 eradication campaigns:

- In 2013, the Governor-led poppy eradication campaign commenced in February and the beginning of March in most regions, while in 2012 eradication activities began in February.
- Governor-led poppy eradication campaigns were more active in Badakhshan province in 2013 than in the previous year.
- In 2013, the number of security incidents (farmers and AGE resistance) during the eradication campaign was much greater than in 2012. The number of fatalities and injuries was significantly higher in 2013 than in 2012: a total of 143 people were killed and 93 people were injured during the poppy eradication campaign, whereas 102 were killed and 127 were injured in 2012.
- Although the second greatest number of hectares eradicated (2,162) was verified in Hilmand province, it was a negligible amount (2%) considering the net amount of opium cultivation in that province (over 100,000 hectares) in 2013.

- Eradication in Farah, Kandahar and Uruzgan (1%, 4% and 4%, respectively) was also negligible in comparison to net opium cultivation (24,492 hectares; 28,335 hectares and 9,880 hectares, respectively).
- By comparison, eradication in Badakhshan represented 118% of the net area under opium cultivation in the province (2,374 hectares).

Table 7: Security incidents eradication, 2008-2013

	2008	2009	2010	2011	2012	2013	Change 2012-2013 %
Personnel injured	>100	52	36	45	127	93	-27%
Fatalities	78	21	28	20	102	143	40%

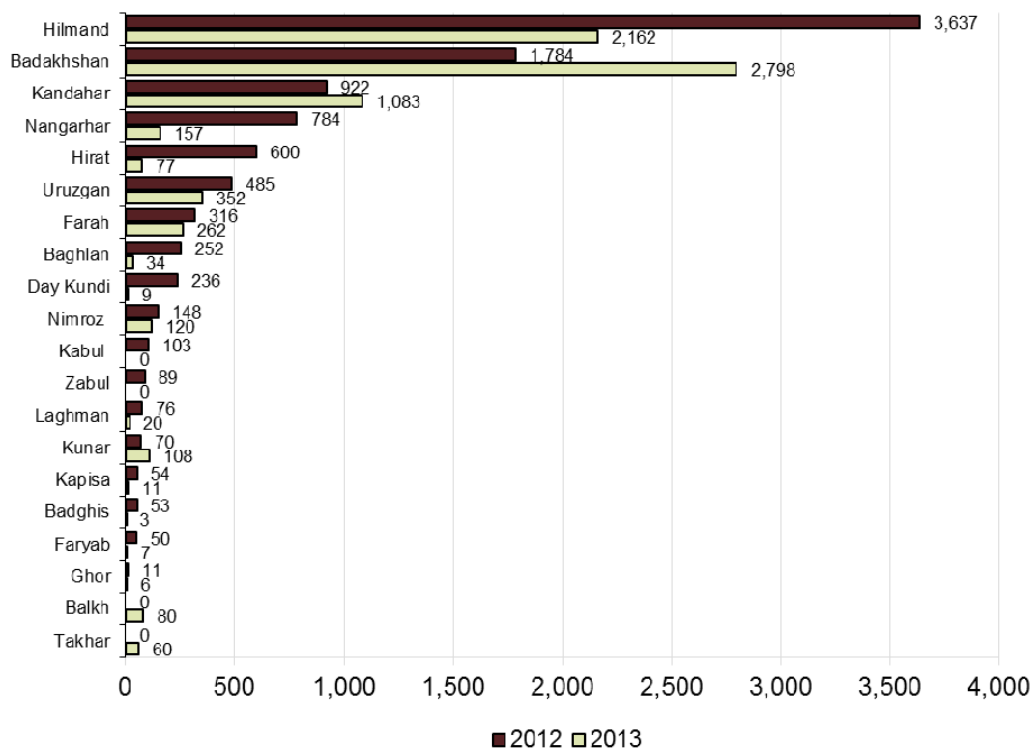
As reported by eradication verification surveyors.

Table 8: Governor-led eradication by province, 2013

Province	Eradication verified (hectares)	Number of eradicated fields reported	Number of villages with eradication reported
Badakhshan	2,798	11,092	338
Badghis	3	22	2
Baghlan	34	291	8
Balkh	80	35	9
Day Kundi*	9	71	3
Farah	262	255	10
Faryab	7	24	7
Ghor	6	43	17
Hilmand	2,162	3,599	149
Hirat	77	559	15
Kandahar	1,083	1,375	121
Kapisa	11	130	3
Kunar	108	221	14
Laghman	20	192	4
Nangarhar	157	1,090	48
Nimroz	120	89	15
Takhar	60	183	10
Uruzgan*	352	1,103	41
Total	7,348	20,374	814

* In 2013, Gizab district of Day Kundi province was under the temporary administrative authority of the governor of Uruzgan province who carried out 22 hectares of eradication in that district. For eradication reporting, these 22 hectares were included in the 352 hectares of eradication reported for Uruzgan.

Figure 10: Eradication comparison, by province, 2012 and 2013 (Hectares)



Opium prices decreased in 2013

Opium prices decreased notably in all regions of Afghanistan in 2013. MCN/UNODC has monitored opium prices in selected provinces of Afghanistan on a monthly basis since 1994 (18 provinces as of September 2011). In 2010 and 2011, price differences between regions became more pronounced but have since become smaller again. High opium prices in 2012 were one of the principal factors behind the increase in opium poppy cultivation in 2013.

The MCN/UNODC price monitoring collects prices in locally used currencies (mostly Afghanis, but as well Pakistani rupees and Iranian Tuman). Between April 2012 and April 2013, the Afghani has devalued against the U.S. dollar by about 10%, a factor that needs to be taken into consideration when analysing the changes in prices.

Figure 9: Dry opium prices reported by traders, by region, January 2005 to August 2013 (United States dollars per kilogram)

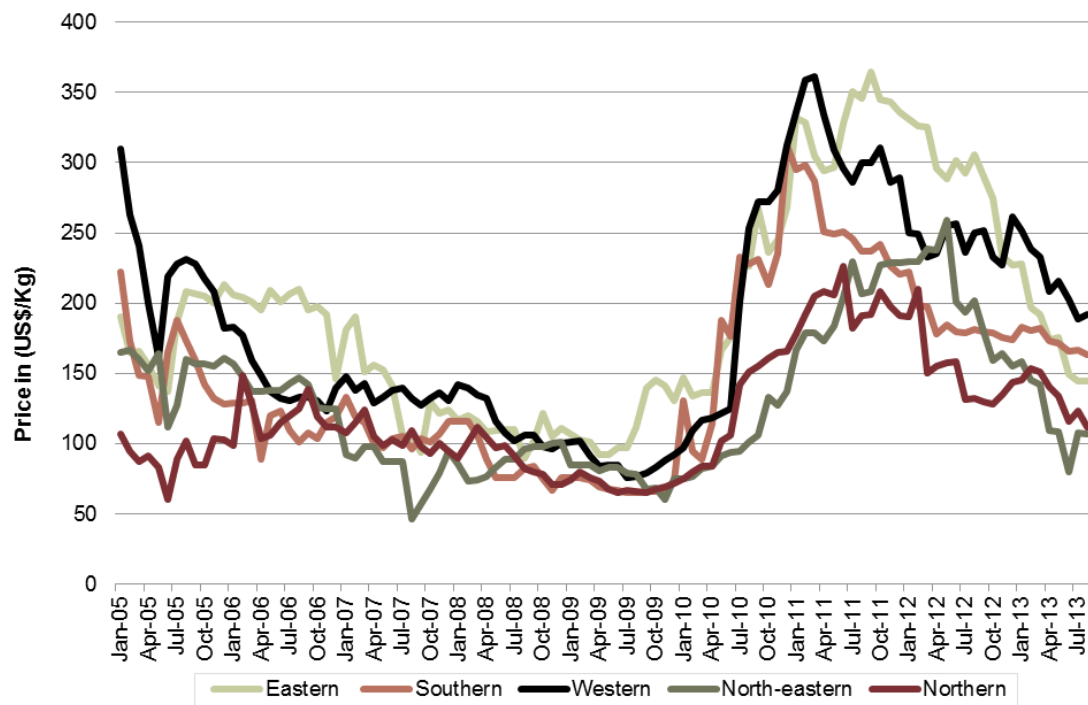
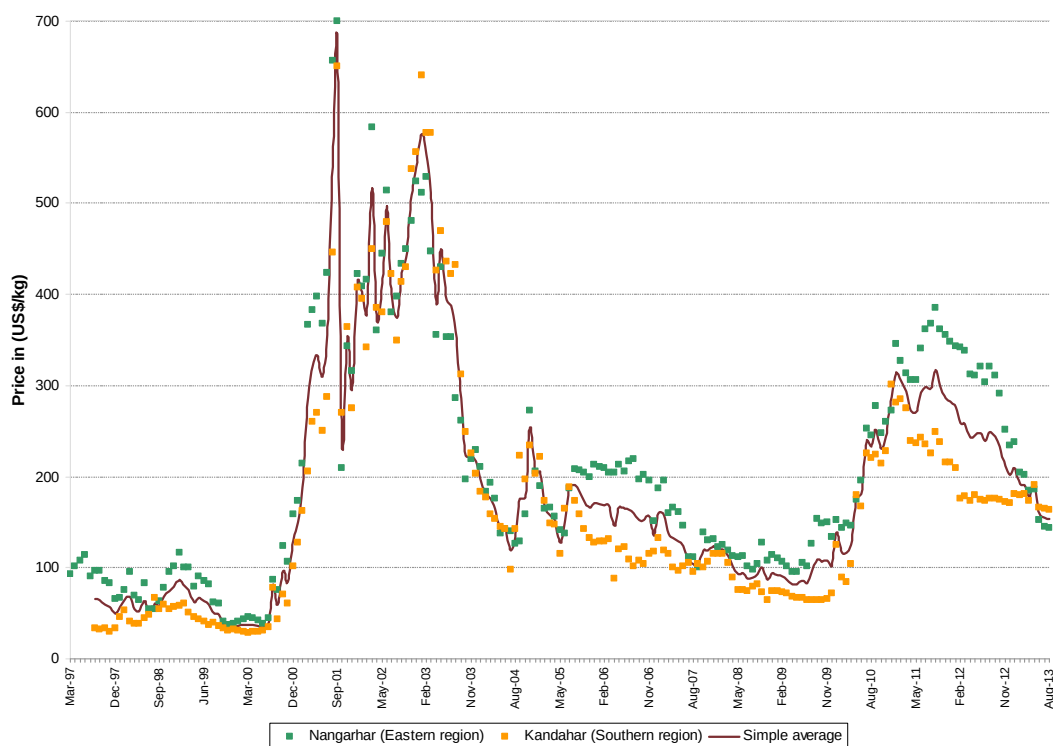


Figure 10: Opium prices reported by traders, Nangarhar and Kandahar provinces, March 1997 to August 2013 (United States dollars per kilogram)



Nominal prices converted to US\$ at local, current exchange rate, not adjusted for inflation.

Table 9: Regional farm-gate prices of dry opium at harvest time, 2011-2012
(United States dollars per kilogram)

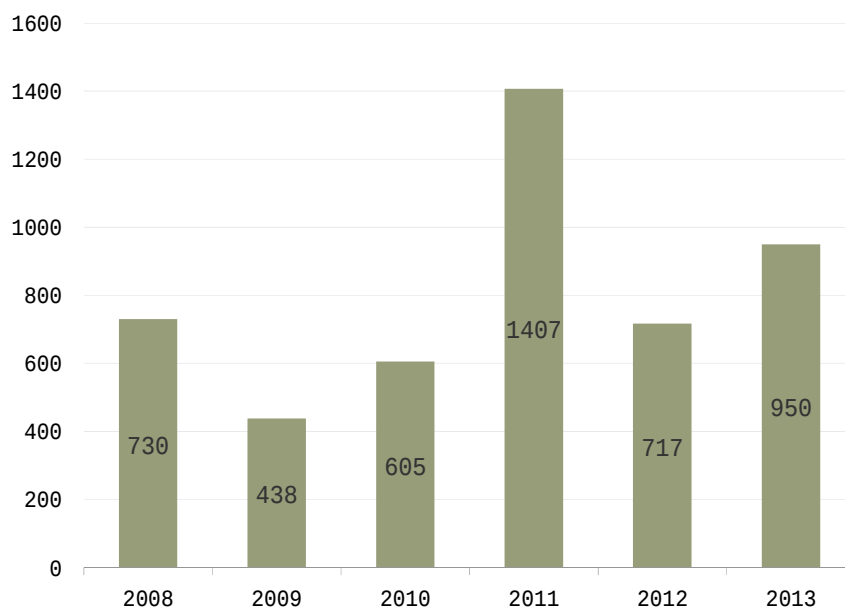
Region	Average dry opium price (US\$/kg) 2012	Average dry opium price (US\$/kg) 2013	Change 2012-2013 (%)
Central	196	221	13%
Eastern	291	171	-41%
North-eastern	182	89	-51%
Northern	151	109	-28%
Southern	173	161	-7%
Western	245	209	-15%
National average weighted by production*	196	172	-12%

* Prices for the Central region were taken from the annual village survey as there is no monthly opium price monitoring in that region. Prices for all other regions were derived from the opium price monitoring system and refer to the month when the opium harvest actually took place in different regions of the country.

Farm-gate value of opium production increased by 31% in 2013

Amounting to US\$ 950 million, the farm-gate value of opium production in 2013 increased by 31% in comparison to its 2012 level. The per-hectare income from opium cultivation decreased by 2% from 2012 to 2013 (US\$ 4,600 and US\$ 4,500, respectively) and is thus relatively stable since 2010 (US\$ 4,700).

Figure 11: Farm-gate value of potential opium production, 2008-2013 (US\$ million)

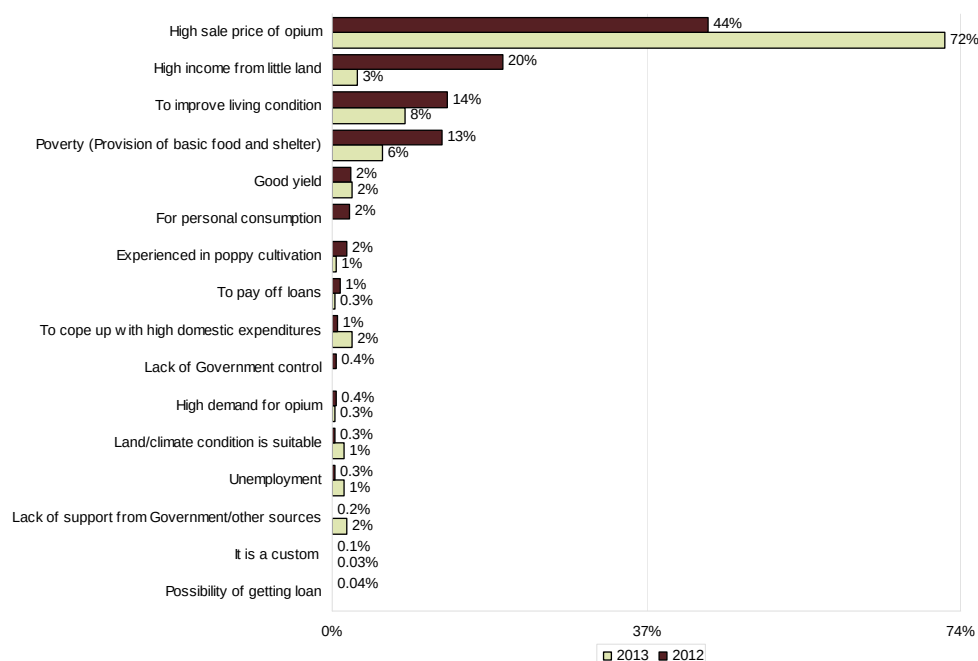


Reasons for cultivating opium poppy

Its high sale price continued to be the most important reason for cultivating opium poppy cited by farmers in 2013 (72%), as it was in 2012 (44%). High income from little land, improving

living conditions, and the provision of basic food and shelter for the family were other important reasons cited by farmers.

Figure 12: Reasons for cultivating opium in 2012-2013 (n = 396 farmers in 2013)



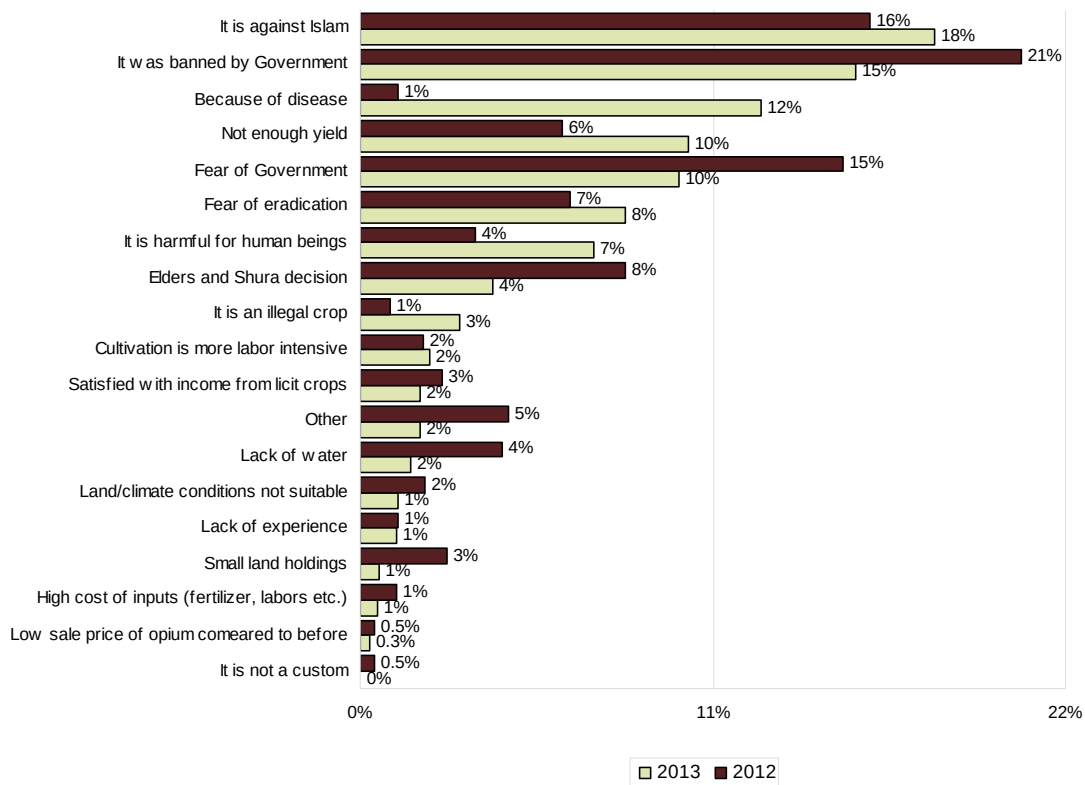
Reasons for ceasing opium cultivation

In 2013, farmers who had ceased cultivating opium in 2012 or before were asked about their major reasons for doing so. Religious belief (opium cultivation being against Islam) was cited by 18% of respondents, making it the most frequently cited reason for ceasing opium cultivation in 2013. The Government ban on opium cultivation was the second most cited reason (15%), while fear of the Government was the third (12%).

A major change in 2013 was ceasing opium cultivation because of the fear of plant diseases, with only 1% of farmers mentioning that they ceased opium cultivation for that reason in 2012, whereas 12% cited it in 2013. Not enough yield was also more often mentioned in 2013 (10%) than one year before (6%). There seems to be a pattern that farmers cite low yield and plant disease as the reasons why they stopped poppy cultivation in years following such events, e.g. in 2011 responses after the widespread occurrence of plant disease in Southern and Western Afghanistan in 2010 and again in 2013 responses after the experience of low yields in 2012, an effect which seems however to wane after a year with good opium yields.

Elders and Shura decision, fear of eradication, not enough yield, lack of water, opium's harmful effect on humans, and the small size of land holdings were the other main reasons mentioned by farmers for ceasing opium cultivation in 2013.

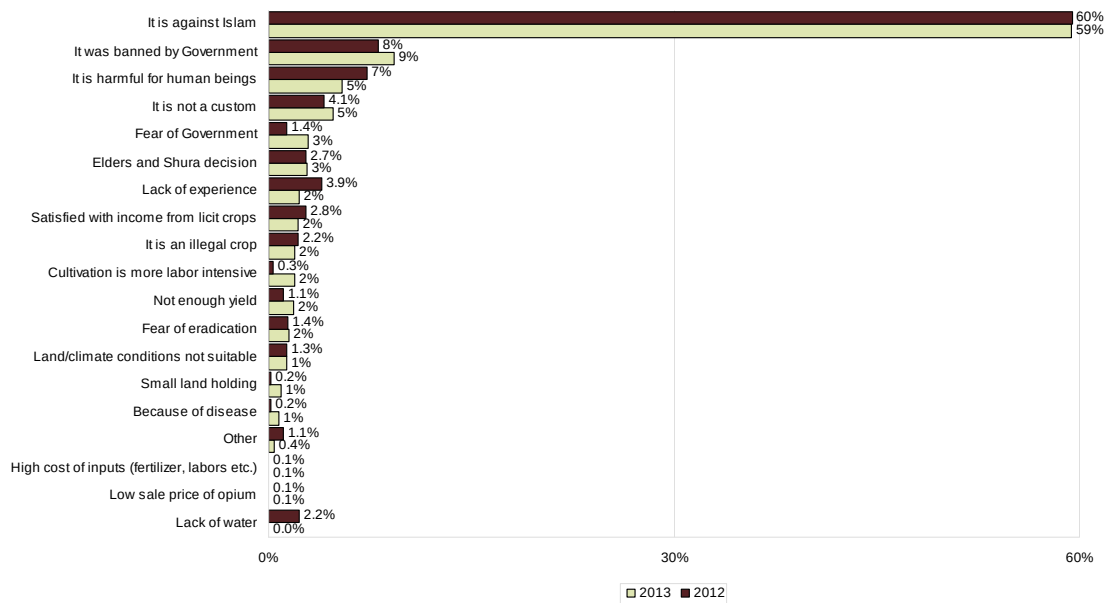
Figure 13: Reasons for ceasing opium cultivation in or before 2012 (n =1071 farmers in 2013), 2012-2013



Reasons for never cultivating opium poppy

In 2012 and 2013, religious belief was the principal reason for never cultivating opium poppy. Some 59% of farmers in 2013 and 60% in 2012 who had never grown opium reported that they did not do so because it is forbidden (haraam) by Islam. The Government ban and opium's harmful effect on humans were the other main reasons for never cultivating opium poppy.

Figure 14: Reasons for never cultivating opium in 2012-2013 (n = 2962 farmers in 2013)



The link between opium cultivation and lack of security

In 2013, 89% of total opium cultivation in Afghanistan took place in the Southern and Western regions: 68% was concentrated in the Southern region; 22% was concentrated in Badghis, Farah, Hirat and Nimroz provinces in the Western region. These are the most insecure provinces, their security risk is classified as “high” or “extreme” by the United Nations Department of Safety and Security (UNDSS), and they are mostly inaccessible to the United Nations and NGOs.

Anti-government elements (AGE) and drug traders are very active in the Western region where Badghis, Farah and Nimroz provinces are known to contain organized criminal networks. While AGE strongholds are in the Southern provinces, the link between lack of security and opium cultivation was also evident in Nangarhar province in the Eastern region and in Kabul province in the Central region, where cultivation was concentrated in districts classified as being of high or extreme security risk.



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