



UNODC

United Nations Office on Drugs and Crime



Islamic Republic of Afghanistan
Ministry of Counter Narcotics



Afghanistan Opium Survey 2012

Summary findings

NOVEMBER 2012

ABBREVIATIONS

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

ACKNOWLEDGEMENTS

The following organizations and individuals contributed to the implementation of the 2012 Afghanistan Opium Survey and to the preparation of this report:

Ministry of Counter-Narcotics:

Mohammad Ibrahim Azhar (Deputy Minister), Haroon Rashid Sherzad (Director General), Policy & Coordination, Mir Abdullah Sadat (Director of Survey and Monitoring Directorate), Saraj Ahmad (Deputy Director of Survey and Monitoring Directorate), Sayed Najibullah Ahmadi (Economic Specialist) Mohammad Ajmal (Database Officer), Mohammad Sadiq Rizaei (GIS & Remote Sensing Analyst), Shiraz Khan Hadawe (GIS & Remote Sensing Analyst), Mohammad Ajmal (Data entry clerk), Sahar Yousofzai (Data entry clerk), Mohammad Hakim Hayat (Data entry clerk), Fazel Karim Alimi (Admin/Finance Assistant) and Hamida Hussaini (Administrative Officer).

Survey Coordinators: Sayed Eshaq Masumi (Central Region), Abdul Mateen (Eastern Region), Abdul Latif Ehsan (Western Region), Fida Mohammad (Northern Region), Mohammed Ishaq Anderabi (North-Eastern Region), Khalil Ahmad Noori (Southern Region) and Khiali Jan Mangal (Eradication Verification and Opium Yield coordinator).

United Nations Office on Drugs and Crime (Kabul)

Jean-Luc Lemahieu (Country Representative), Ashita Mittal (Deputy Representative, Programme), Devashish Dhar (International Project Coordinator), Ziauddin Zaki (National Project Coordinator), Abdul Mannan Ahmadzai (Survey Officer), Noor Mohammad Sadiq (Database Developer)

Remote sensing analysts: Ahmad Jawid Ghiasee and Sayed Mehdi Sadat

Eradication reporters: Zia Ulhaq Sidiqi

Survey Coordinators: Abdul Basir Basiret (Eastern Region), Bashir Ahmad Shakir (Southern Region), Fawad Ahmad Alaie (Western Region), Sayed Emran Mehrwarz (North-eastern Region), Rahimullah Omar (Central Region)

Provincial Coordinators: Mohammad Alam Ghalib (Eastern Region), Altaf Hussain Joya (Western Region), Lutfurhaman Lutfi (Northern Region)

United Nations Office on Drugs and Crime (Vienna)

Sandeep Chawla (Director, Division for Policy Analysis and Public Affairs), Angela Me (Chief, Statistics and Surveys Section-SASS), Martin Raithelhuber (Programme Officer), Irmgard Zeiler (Research Expert), Philip Davis (Statistician), Coen Bussink (GIS & Remote Sensing Expert), Yen-Ling Wong (Scientific Affairs Officer, Laboratory and Scientific Section), Suzanne Kunnen (Public Information Assistant, Studies and Threat Analysis Section), Jonathan Gibbons (Editor).

The implementation of the survey would not have been possible without the dedicated work of the field surveyors, who often faced difficult security conditions.

The MCN/UNODC Illicit Crop Monitoring activities in Afghanistan were made possible by financial contributions from the Governments of Germany, Norway, the United Kingdom and the United States of America.

Fact Sheet, Afghanistan Opium Survey 2012¹

	2011	Change from 2011	2012
Net opium poppy cultivation (after eradication) in hectares (ha)	131,000 ha (109,000-155,000)	+18%	154,000 ha (125,000 – 189,000)
Number of poppy-free provinces ²	17	0%	17
Number of provinces affected by poppy cultivation	17	0%	17
Eradication	3,810	+154%	9,672
Average opium yield (weighted by area)	44.5 kg/ha	-47%	23.7 kg/ha ³
Potential production of opium	5,800 tons (4,800-6,800)	-36%	3,700 tons (2,800 – 4,200 tons)
Average farm-gate price (weighted by production) of fresh opium at harvest time	US\$ 180/kg	-9%	US\$ 163/kg
Average farm-gate price (weighted by production) of dry opium at harvest time	US\$ 241/kg	-19%	US\$ 196/kg
Current GDP ⁴	US\$ 16.34 billion		US\$ 18.95 billion
Total farm-gate value of opium production	US\$ 1.4 billion	-49%	US\$ 0.7 billion (US\$ 0.5 – 0.8 billion)
In percentage of GDP	7%		4%
Gross income from opium per hectare ⁵	US\$ 10,700	-57%	US\$ 4,600

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

² Poppy-free provinces are those estimated to have less than 100 hectares of opium cultivation.

³ There have been reports from the Eastern, Western and Southern regions that a significant area was affected by disease and/or adverse weather conditions, which reduced the opium yield. The yield survey captured this impact at least partially. However, a stronger reduction of yield cannot be excluded.

⁴ Relation to nominal GDP of the respective year. Source: Government of Afghanistan, Central Statistical Office.

⁵ Income figures are indicative only as they do not include all expenditure and income components associated with opium cultivation.

NATIONAL OVERVIEW

Despite the eradication of opium poppy by Governor-led Eradication (GLE) having increased by 154% in comparison to its 2011 level (9,672 hectares eradicated in 2012), the total area under opium poppy cultivation in Afghanistan was estimated at 154,000 hectares (125,000 – 189,000) in 2012.

While that represents a 18% increase in cultivation, potential opium production was estimated at 3,700 tons (2,800 – 4,200 tons) in 2012, a 36% decrease from the previous year. This was due to a decrease in opium yield caused by a combination of a disease of the opium poppy and adverse weather conditions, particularly in the Eastern, Western and Southern regions of the country.

The high level of opium prices reported in 2011 was one of the principal factors that led to the increase in opium poppy cultivation in 2012. However, while opium prices remained high during 2012 there was some decline in all regions of the country, though differences between regions became more and more pronounced.

The vast majority (95%) of total cultivation took place in nine provinces in Afghanistan's Southern and Western regions,⁶ which include the most insecure provinces in the country. Opium cultivation increased in most of the main opium poppy-growing provinces, including Farah, Nangarhar, Badghis and Nimroz, whereas cultivation remained stable in Uruzgan and decreased by 11%⁷ in Kandahar, the second most important poppy-cultivating province between 2009 and 2011.

Opium cultivation rose by 19% in Hilmand which, with 75,176 hectares or 49% of total opium cultivation in 2012, remained the largest opium-cultivating province in Afghanistan. However, a separate estimate was also available for the Hilmand "Food Zone" alternative livelihood project⁸, which showed that relatively less poppy is cultivated within the food zone than outside it.

Opium cultivation also increased in the Eastern region where it rose significantly in Kunar (121%), Kapisa (60%) and Laghman (41%) provinces. However, the Eastern region contributed only 4% to the national total of opium production in 2012. In the Northern region, opium cultivation increased by 10% in Baghlan province despite the eradication of 252 hectares in 2012.

Badakhshan, the only opium-cultivating province in the North-eastern region, also experienced an increase in opium cultivation of 13% despite the eradication of 1,784 hectares. In Kabul, the Central region's only opium-cultivating province, opium

⁶ Regions as designated by UNODC for analytical purposes. Please refer to table 1 for a full list.

⁷ In Kandahar the sampling procedure was improved, therefore the results from 2012 are only to a limited extent comparable with the 2011 estimates.

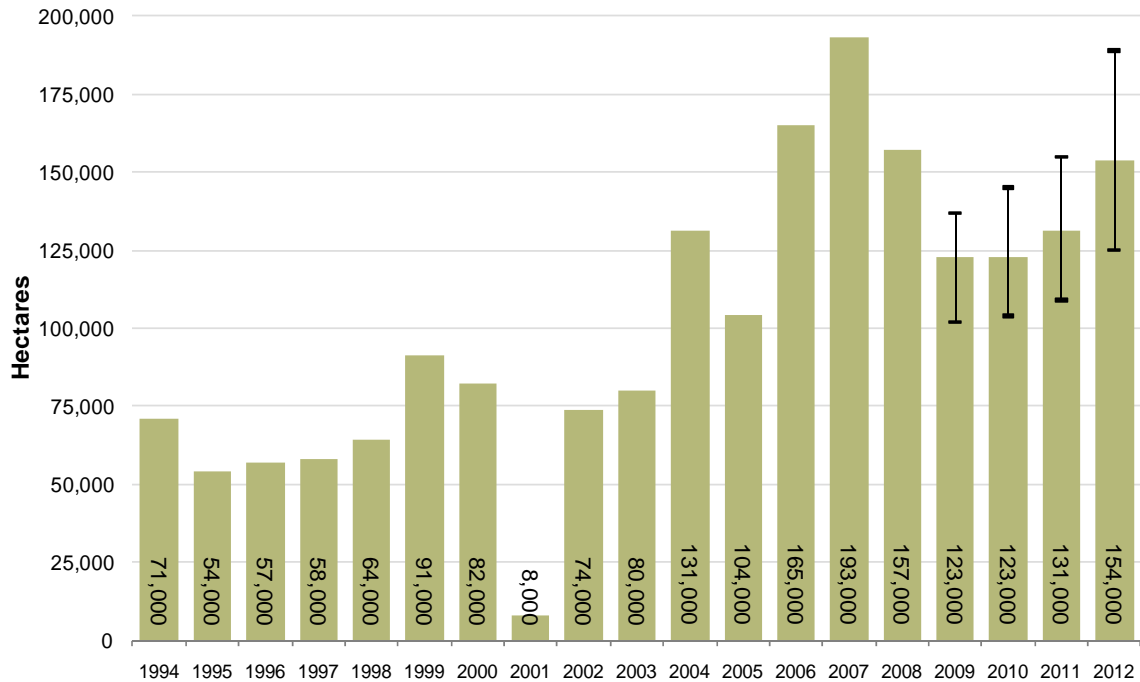
⁸ 42,000 farmers in ten districts in Hilmand province were provided with fertilizer, certified wheat seed and high-value horticultural seeds during a 45-day period that competes directly with the poppy planting season for 2012. See http://afghanistan.usaid.gov/en/USAID/Activity/255/Hilmand_Food_Zone_Project_HFZP.

cultivation decreased by 45% between 2011 and 2012, but the province narrowly missed the poppy-free status threshold of 100 hectares.

At 17, the number of poppy-free provinces in Afghanistan remained unchanged in 2012. However, the Western region’s Ghor province lost its poppy-free status in 2012, while the Northern region’s Faryab province regained the poppy-free status it had in both 2009 and 2010.

By and large, the regional divide in opium cultivation in Afghanistan continued to exist in 2012. Most opium cultivation remained confined to the country’s Southern and Western provinces, which are dominated by insurgency and organized criminal networks. This confirms the link between insecurity and opium cultivation observed in the country since 2007.

Figure 1: Opium cultivation in Afghanistan, 1994-2012 (Hectares (ha))



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

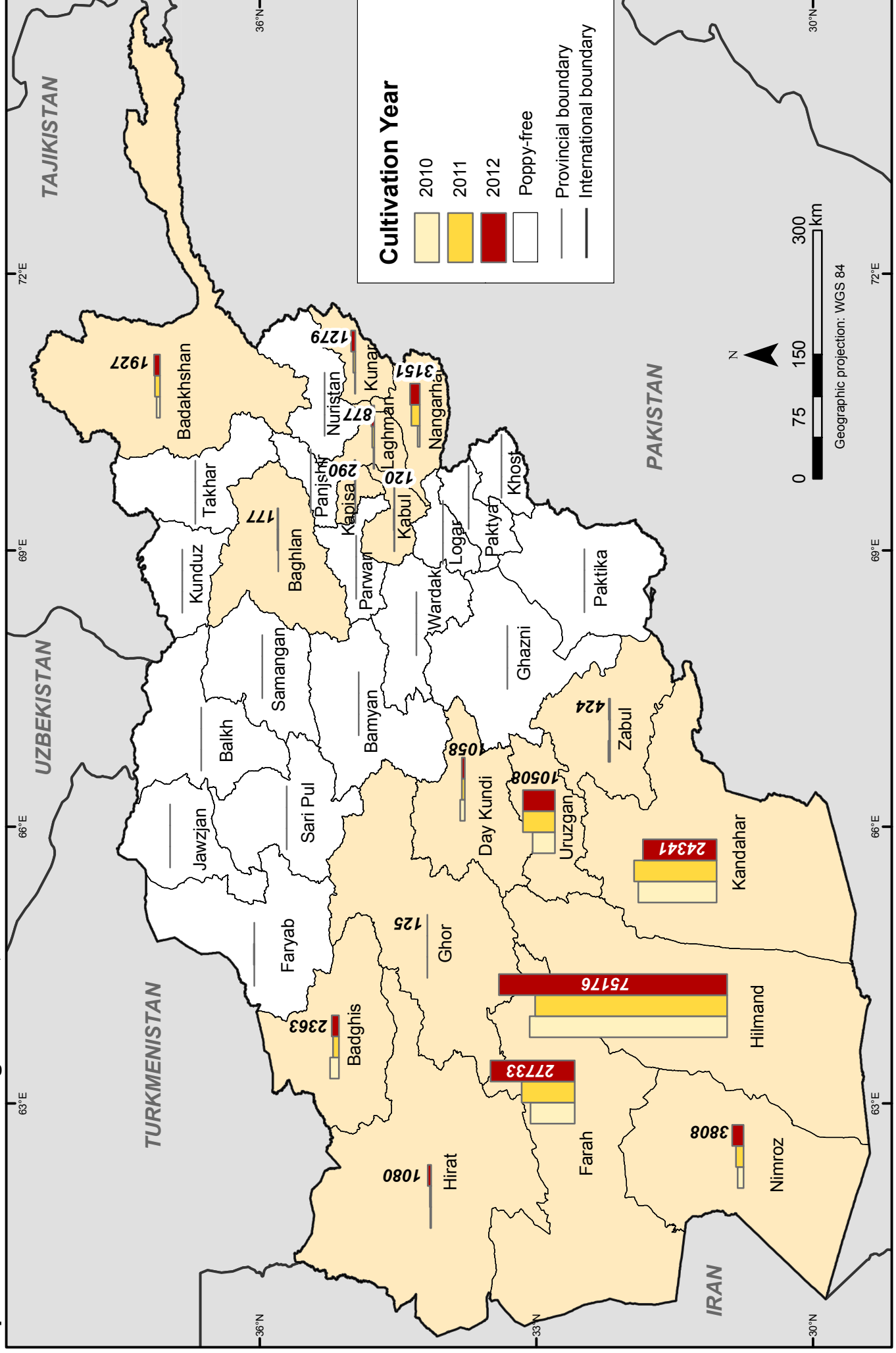
Table 1: Opium cultivation (2006-2012) and eradication (2011-2012) in Afghanistan (Hectares)

PROVINCE	Cultivation 2006 (ha)	Cultivation 2007 (ha)	Cultivation 2008 (ha)	Cultivation 2009 (ha)	Cultivation 2010 (ha)	Cultivation 2011 (ha)	Cultivation 2012 (ha)	Change 2011-2012 (%)	Eradication in 2011 (ha)	Eradication in 2012 (ha)
Kabul	80	500	310	132	152	220	120	-45%	80	103
Khost	133	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	Poppy-free	NA	0	0
Paktya	Poppy-free	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	Poppy-free	NA	0	0
Parwan	124	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	Poppy-free	NA	0	0
Ghazni	Poppy-free	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	Poppy-free	NA	0	0
Central Region	337	500	310	132	152	220	120	-45%	80	103
Kapisa	282	835	436	Poppy-free	Poppy-free	181	290	+60%	5	54
Kunar	932	446	290	164	154	578	1,279	+121%	1	70
Laghman	710	561	425	135	234	624	877	+41%	21	76
Nangarhar	4,872	18,739	Poppy-free	294	719	2,700	3,151	+17%	61	784
Nuristan	1,516	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Eastern Region	8,312	20,581	1,151	593	1,107	4,082	5,596	+37%	89	985
Badakhshan	13,056	3,642	200	557	1,100	1,705	1,927	+13%	367	1,784
Takhar	2,178	1,211	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Kunduz	102	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
North-eastern Region	15,336	4,853	200	557	1,100	1,705	1,927	+13%	367	1,784
Baghlan	2,742	671	475	Poppy-free	Poppy-free	161	177	+10%	31	252
Balkh	7,232	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Bamyan	17	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Faryab	3,040	2,866	291	Poppy-free	Poppy-free	145	Poppy-free	NA	2	50
Jawzjan	2,024	1,085	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Samangan	1,960	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Sari Pul	2,252	260	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Northern Region	19,267	4,882	766	Poppy-free	Poppy-free	305	177	-42%	34	302
Hilmand	69,324	102,770	103,590	69,833	65,045	63,307	75,176	+19%	1,940	3,637
Kandahar	12,619	16,615	14,623	19,811	25,835	27,213	24,341	-11%	287	922
Uruzgan	9,703	9,204	9,939	9,224	7,337	10,620	10,508	-1%	154	485
Zabul	3,210	1,611	2,335	1,144	483	262	424	+62%	85	88
Day Kundi	7,044	3,346	2,273	3,002	1,547	1,003	1,058	+5%	235	236
Southern Region	101,900	133,546	132,760	103,014	100,247	102,405	111,507	+9%	2,701	5,368
Badghis	3,205	4,219	587	5,411	2,958	1,990	2,363	+19%	36	53
Farah	7,694	14,865	15,010	12,405	14,552	17,499	27,733	+58%	212	316
Ghor	4,679	1,503	Poppy-free	Poppy-free	Poppy-free	Poppy-free	125	NA	43	11
Hirat	2,287	1,525	266	556	360	366	1,080	+195%	227	600
Nimroz	1,955	6,507	6,203	428	2,039	2,493	3,808	+53%	20	148
Western Region	19,820	28,619	22,066	18,800	19,909	22,348	35,109	+57%	539	1,130
Total (rounded)	165,000	193,000	157,000	123,000	123,000	131,000	154,000	18%	3,810	9,672

A province is defined as poppy-free when it is estimated to have less than 100 ha of opium cultivation. Due to administrative boundary changes, estimates for Farah and Nimroz for 2009 and later were calculated considering parts of Khash Rod district, the main opium cultivating district in Nimroz, as being in Farah province. Figures for 2008 and before include all of Khash Rod district in Nimroz province. Source: MCN/UNODC.

Due to difficulties in acquiring the satellite imagery which are normally used for the annual opium survey over the province of Hirat, a different estimation methodology was used which limits comparability with previous years.

Opium cultivation in Afghanistan, 2010-2012



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

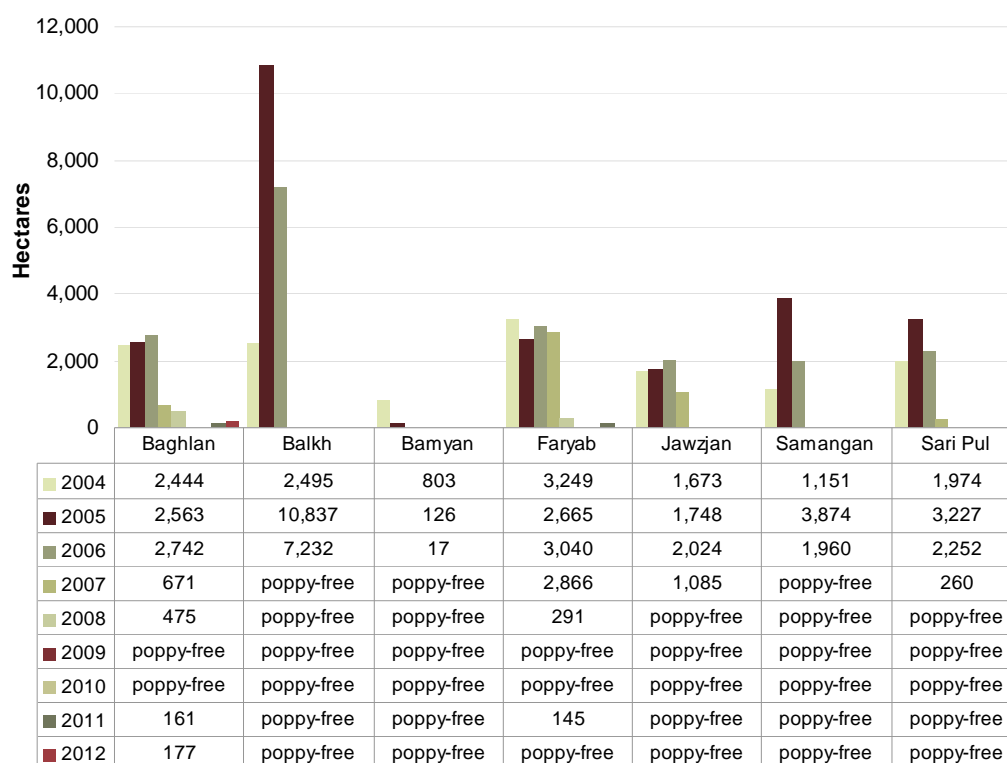
Poppy-free provinces

The number of poppy-free provinces (17) remained unchanged in 2012. In the Northern region, Faryab regained the poppy-free status it had in 2009 and 2010 but, in the Western region, Ghor province lost its 2011 poppy-free status. However, the level of cultivation in Ghor province remained very low (125 hectares), slightly above the 100 hectare threshold that defines poppy-free status. Out of the 17 poppy-free provinces in 2011, 16 continued to be poppy-free in 2012.

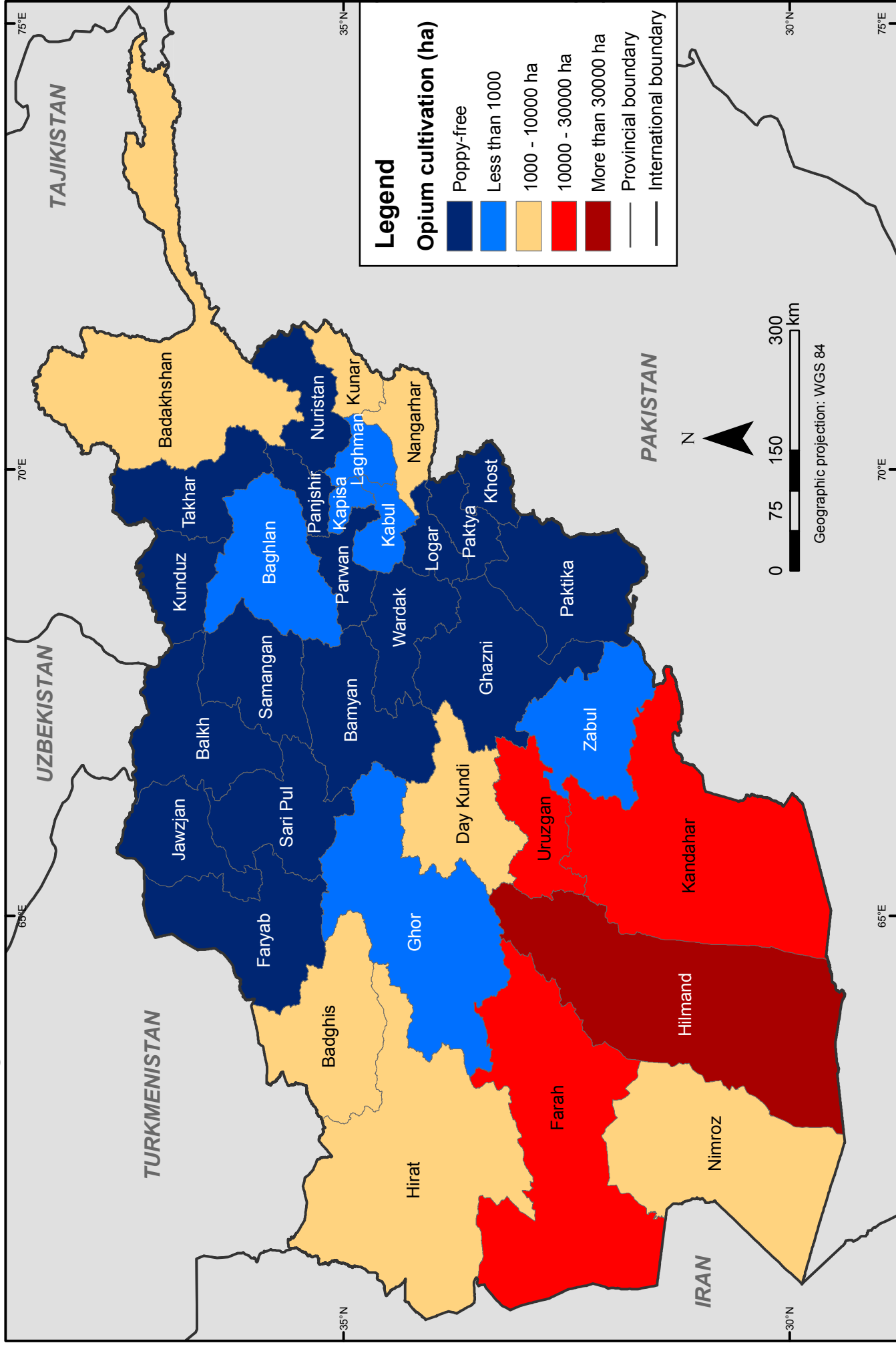
Table 2: Provinces with poppy-free status in 2012 (<100 hectares of opium poppy cultivation)

Region	Province
Central region	Khost, Logar, Paktya, Paktika, Panjshir, Parwan, Wardak, Ghazni
Northern region	Balkh, Bamyan, Farayb, Jawzjan, Samangan, Sari Pul
North-eastern region	Kunduz, Takhar
Eastern region	Nuristan
Western region	None

Figure 2: Opium poppy cultivation in the Northern region, by province, 2004-2012 (Hectares)



Opium cultivation in Afghanistan, 2012 (at province level)



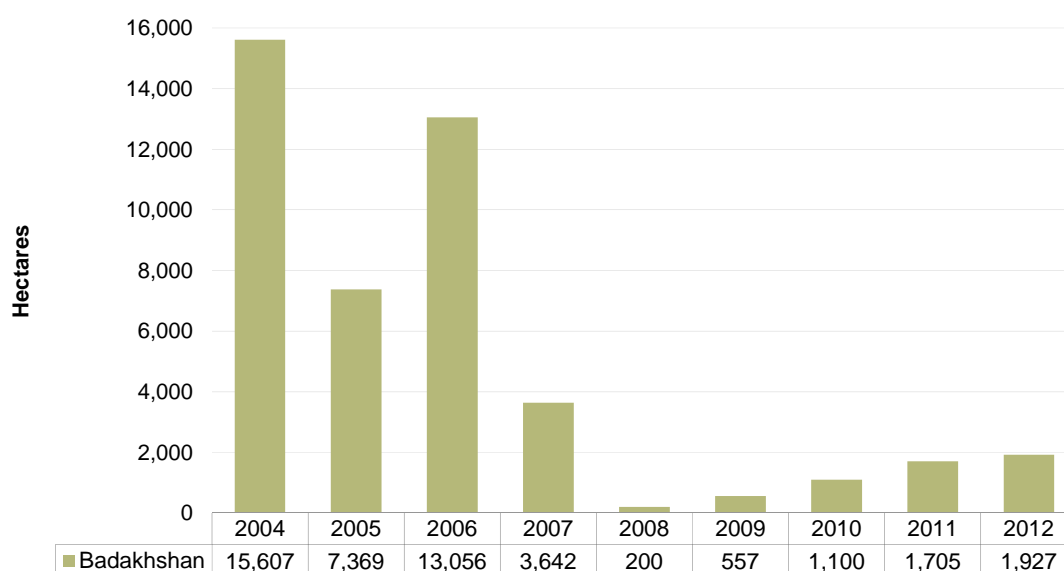
Source: Government of Afghanistan - National monitoring system implemented by UNODC
 Note: The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations.

Regional 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 1,927 hectares, opium cultivation in Badakhshan remained low in 2012. However, it did represent a slight increase (13%) on 2011 and happened despite the eradication of 1,784 hectares of opium poppy in 2012.

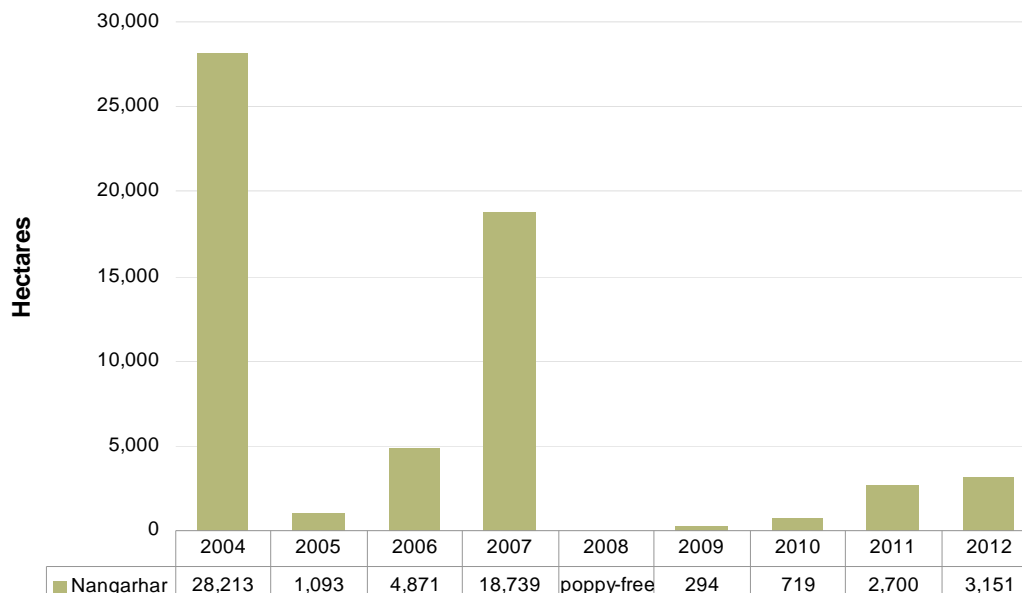
Figure 3: Opium poppy cultivation in Badakhshan province, 2004-2012 (Hectares)



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

Poppy-free since 2008, Nangarhar province saw its opium cultivation continue to increase to a level of 3,151 hectares in 2012. Considering that Nangarhar was an important opium-growing province prior to 2008, the area estimated in 2012 was comparatively modest despite increasing by 17% since 2011. In 2012, 784 hectares of opium poppy cultivation were eradicated in Nangarhar province, which is a significant increase as only 16 hectares and 61 hectares of opium were eradicated in 2010 and 2011, respectively, due to strong resistance to eradication by AGE.

Figure 4: Opium cultivation in Nangarhar province, 2004-2012 (Hectares)



Kapisa, Kunar and Laghman

In Kapisa province, opium cultivation increased by 60%, from 181 hectares in 2011 to 290 hectares in 2012. The amount of poppy eradication in Kapisa province was small (54 hectares) in 2012. Kapisa was poppy-free in 2009 and 2010.

In Kunar province, there was a significant increase (121%) in opium cultivation, from 578 hectares in 2011 to 1,279 hectares in 2012. 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, opium cultivation also increased significantly (41%), from 624 hectares in 2011 to 877 hectares in 2012. At 70 hectares and 76 hectares, respectively, only a small amount of poppy cultivation was eradicated in Kunar and Laghman provinces in 2012.

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

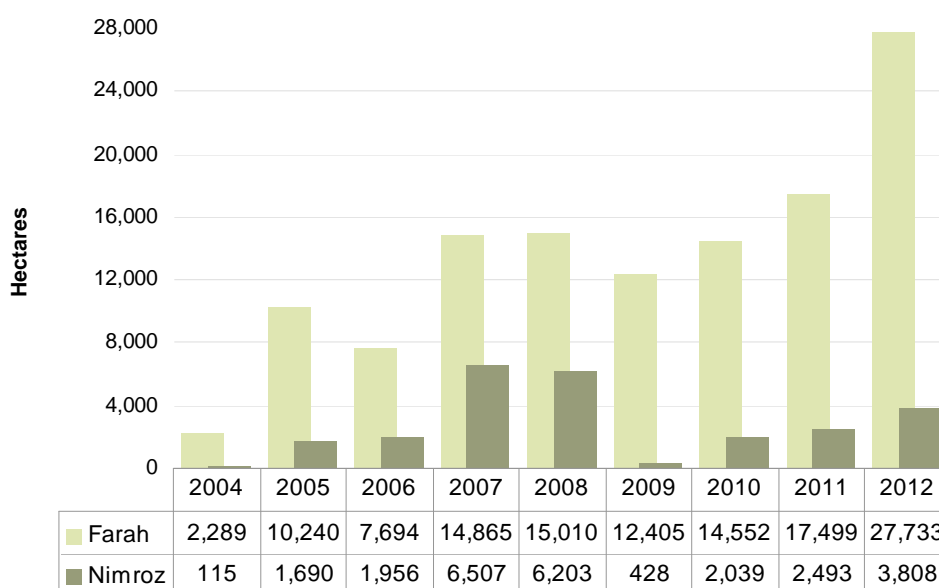
In 2012, there was a significant increase (58%) in opium cultivation (27,733 hectares) in Farah province in comparison to its 2011 level (17,499 hectares). The increase took place in Delaram and Bakwah, which are some of the most insecure provinces in the Western region. A total of 316 hectares of opium poppy cultivation was eradicated in Farah province in 2012.

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, it underwent a further increase of 20% (17,499 hectares).

Nimroz province remained the second largest opium cultivating province in the Western region, with 3,808 hectares under cultivation. The amount eradicated (148 hectares) in Nimroz province was negligible when compared to total opium cultivation in 2012.

Figure 5: Opium cultivation in Farah and Nimroz provinces, 2004-2012 (Hectares)



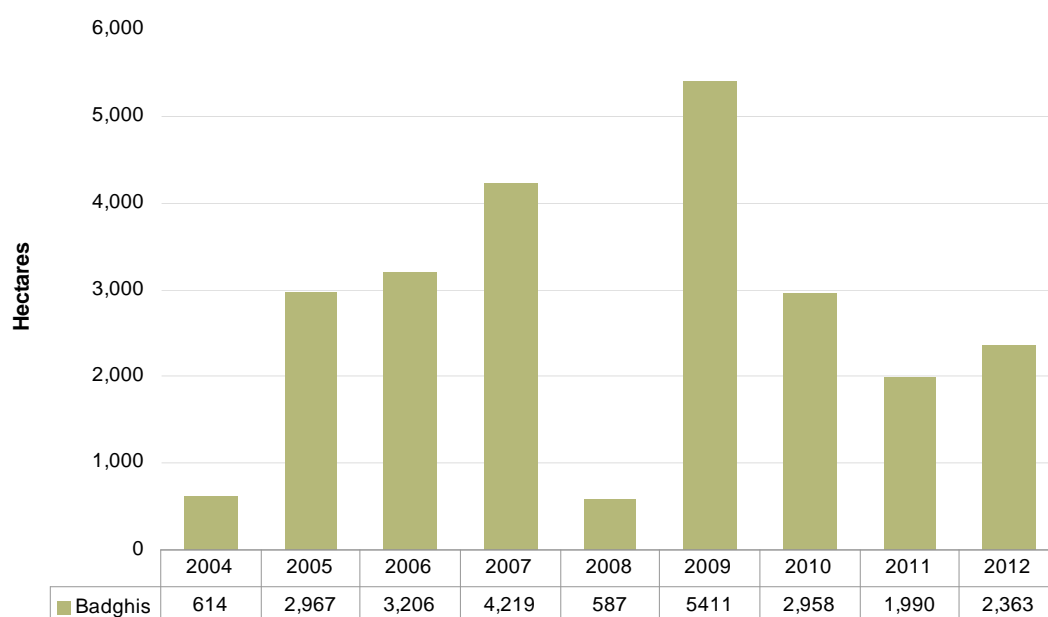
Note: Due to administrative boundary changes, estimates for Farah and Nimroz for 2009 and later were calculated considering parts of Khash Rod district, the main opium cultivating district in Nimroz, as being in Farah province. Figures for 2008 and before include all of Khash Rod district in Nimroz province.

Opium poppy cultivation increased in Badghis and Hirat

With a total of 2,363 hectares in 2012 as opposed to 1,990 hectares in 2011, there was an increase of 19% in opium cultivation in Badghis province where opium cultivation is often driven by the amount of rain-fed crops. Opium cultivation increased steadily between 2004 and 2009, with the exception of 2008 when a drought and 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, 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.

The level of opium poppy cultivation in Hirat province increased substantially, with 1,080 hectares⁹ in 2012, 366 hectares in 2011 and 360 hectares in 2010. A total of 600 hectares of Governor-led eradication was verified in Hirat province in 2012.

Figure 6: Opium cultivation in Badghis province, 2004-2012 (Hectares)



Southern region – Opium cultivation increased by 19% in Hilmand, but a considerably smaller proportion took place within the Food Zone

With 73% of Afghan opium cultivation in 2012, the Southern region remained the largest opium poppy-cultivating region in Afghanistan. The level of opium cultivation increased by 19% in Hilmand province in comparison to 2011 (from 63,307 hectares to 75,176 hectares). Thus, with 49% of total opium cultivation in Afghanistan in 2012, Hilmand continued to remain the country’s largest opium-cultivating province.

In 2012, a separate estimate for opium cultivation in the “Food Zone” in Hilmand province was also available. Estimated at 24,241 hectares, opium cultivation represented about a seventh of the Food Zone’s total agricultural area. Outside the Food Zone, the extent of poppy cultivation was much greater, as more than a third of available land was under poppy cultivation, showing that relatively less opium poppy is cultivated within the Food Zone than outside it. Worryingly, however, in areas bordering the food zone a large

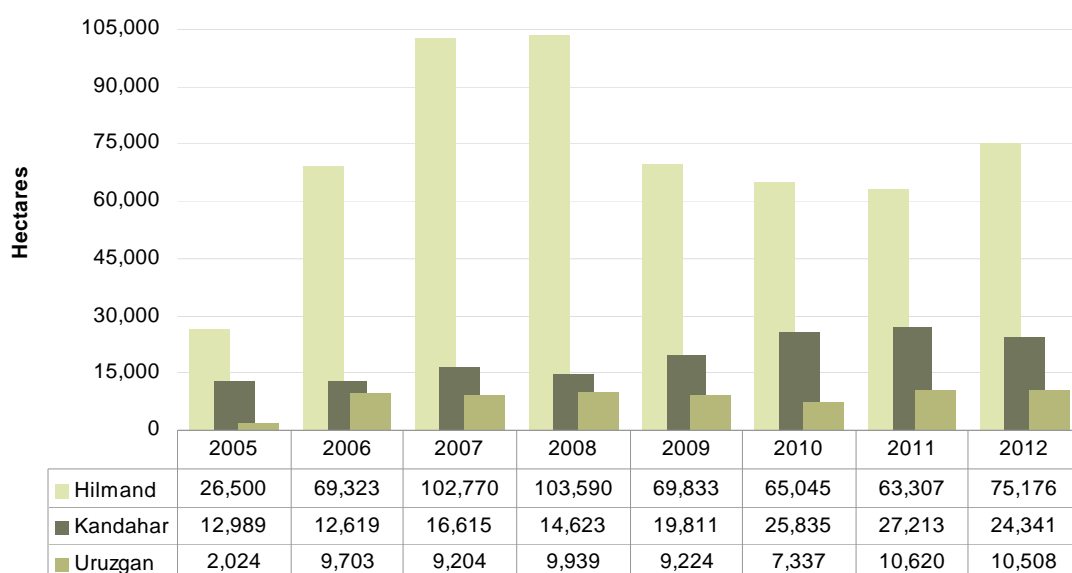
⁹ Due to difficulties in acquiring the satellite imagery which are normally used for the annual opium survey over the province of Hirat, a different estimation methodology was used which limits comparability with previous years.

A total of 3,637 hectares of Governor-led eradication was verified in Hilmand province in 2012, which accounted for only 5% of estimated total opium cultivation.

Kandahar province, Hilmand's neighbour to the east, experienced an opposing trend: opium cultivation had increased between 2008 and 2011, but Kandahar saw a drop of 11%¹⁰ in opium cultivation in 2012 (from 27,213 hectares in 2011 to 24,341 hectares in 2012). Kandahar was the third largest opium cultivating province in 2012 after Hilmand in the Southern region and Farah in the Western region, despite a decrease representing 16% of national cultivation in 2012.

In 2011, Uruzgan province witnessed the greatest increase (45%) in the Southern region (from 7,337 hectares in 2010 to 10,620 hectares in 2011), but its level of opium poppy cultivation remained stable in 2012.

Figure 7: Opium cultivation in Hilmand, Kandahar and Uruzgan provinces, 2005-2012 (Hectares)



¹⁰ The sampling procedure in Kandahar was improved in 2012. Therefore, 2012 estimates are only comparable to previous estimates to a limited extent.

Table 3: Regional distribution of opium cultivation, 2011-2012 (Hectares)

Region	2011 (ha)	2012 (ha)	Change 2011-2012 (%)	2011 (ha) as % of total	2012 (ha) as % of total
Southern	102,405	111,507	+9%	78%	72%
Western	22,348	35,109	+57%	17%	23%
Eastern	4,082	5,596	+37%	3%	4%
North-eastern	1,705	1,927	+13%	1%	1%
Central	220	120	-45%	0.2%	0.1%
Northern	305	177	-42%	0.2%	0.1%
Rounded Total	131,000	154,000	+18%	100%	100%

Table 4: Main opium-cultivating provinces in Afghanistan, 2007-2012 (Hectares)

Province	2007	2008	2009	2010	2011	2012	Change 2011-2012	2012 (ha) as % of total
Hilmand	102,770	103,590	69,833	65,045	63,307	75,176	+19%	49%
Kandahar	16,615	14,623	19,811	25,835	27,213	24,341	-11%	16%
Farah	14,865	15,010	12,405	14,552	17,499	27,733	+58%	18%
Uruzgan	9,204	9,939	9,224	7,337	10,620	10,508	-1%	7%
Nangarhar	18,739	Poppy free	294	719	2,700	3,151	+17%	2%
Badakhshan	3,642	200	557	1,100	1,705	1,927	+13%	1%
Badghis	4,219	587	5,411	2,958	1,990	2,363	+19%	2%
Day Kundi	3,346	2,273	3,002	1,547	1,003	1,058	+5%	1%
Nimroz	6,507	6,203	428	2,039	2,493	3,808	+53%	2%
Rest of the country	13,074	4,828	2,131	1,383	2,535	4,371	+72%	3%
Rounded Total	193,000	157,000	123,000	123,000	131,000	154,000	+18%	100%

Potential opium production decreased in 2012

In 2012, estimated potential opium production in Afghanistan amounted to 3,700 tons (2,800 – 4,200 tons), a drop of 36% compared to its 2011 level (5,800 tons), whereas average opium yield amounted to 23.7 kilograms per hectare in 2012, which is some 47% less than in 2011 (44.5 kilograms per hectare).

The reduction in yield and subsequently in production was caused by a disease of the opium plant and adverse weather conditions. In particular, the Eastern, Western and Southern regions reported widespread disease that affected poppy plants at an early stage.

Some evidence also points to a cold spell/frost that affected poppy in late March, in the early-growing regions at least, which also has the potential to reduce opium yield.

The yield survey undertaken by UNODC captured the effects of the disease/adverse weather conditions at least partially. In the Southern region, for example, the yield survey showed a reduction of more than 50%, but an even smaller yield cannot be excluded in some parts of those regions.

Interestingly, 2012 production was at the same level as 2010 when poppy plants were also affected by disease. In 2010, yield was estimated at 29.2 kilograms per hectare.

Despite the poppy disease, the Southern region continued to produce the vast majority of opium in Afghanistan in 2012, representing 68% of national production. The Western region was the country's second most important opium-producing region (22%).

Table 5: Potential opium production by region, 2011-2012 (Tons)

Region	Production 2011	Production 2012	Change 2010-2011 (%)
Central	9	4	-55%
Eastern	166	216	30%
North-eastern	39	86	120%
Northern	12	7	-42%
Southern	4,924	2520	-49%
Western	685	824	20%
Total (rounded)	5,800	3,700	--36%

Poppy Eradication increased by 154% in 2012

A total of 9,672 hectares of verified poppy eradication was carried out by the Governors in 2012, representing an increase of 154% on 2011 when 3,810 hectares of Governor-led poppy eradication (GLE) was verified by MCN/UNODC in the same 18 provinces as in 2012. The final eradication figures in Badakhshan, Baghlan, Day Kundi, Farah, Hilmand, Kabul, Kandahar, Kapisa, Laghman, Nangarhar, Uruzgan and Zabul provinces were corrected after verification with satellite images.

Table 6: Eradication and opium cultivation in Afghanistan 2005-2012 (Hectares)

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

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

** Net opium cultivation after eradication

Major observations on 2012 and 2011 eradication campaigns :

- In 2012, the Governor-led poppy eradication campaign commenced in March in most regions, while in 2011 eradication activities in Hilmand and Kandahar provinces in the Southern region began in February.
- Governor-led poppy eradication campaigns were more active in all regions in 2012 than in the previous year.
- In 2012, the number of security incidents (farmers and AGE resistance) during the eradication campaign was much greater than in 2011. GLE teams were attacked 117 times in 2012, while there were only 48 attacks on GLE teams in 2011. The increase in the number of security incidents could be because more eradication was carried out in 2012. The number of fatalities was significantly larger in 2012 than in 2011: a total of 102 people were killed during the poppy eradication campaign, whereas 20 were killed in 2011.

Table 7: Security incidents eradication, 2008-2012

	2008	2009	2010	2011	2012	Change 2011-2012 %
Personnel injured	>100	52	36	45	127	182%
Fatalities	78	21	28	20	102	410%

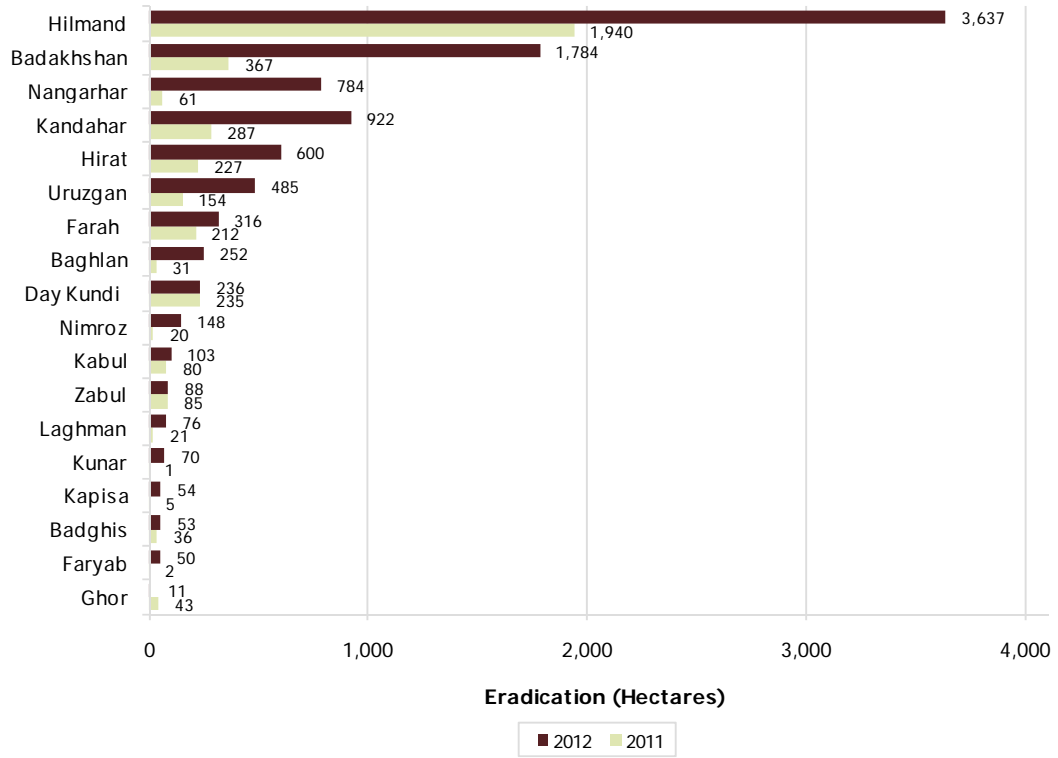
As reported by eradication verification surveyors.

Although the greatest number of hectares eradicated (3,637) was verified in Hilmand province, it was a negligible amount (5%) considering the net amount of opium cultivation in that province (over 75,000 hectares) in 2012. Eradication in Farah, Kandahar and Uruzgan (1%, 4% and 5%, respectively) was also negligible in comparison to net opium cultivation (27,733 hectares, 24,341 hectares and 10,508 hectares, respectively). By comparison, eradication in Badakhshan represented 94% of the net area under opium cultivation in the province (1,900 hectares).

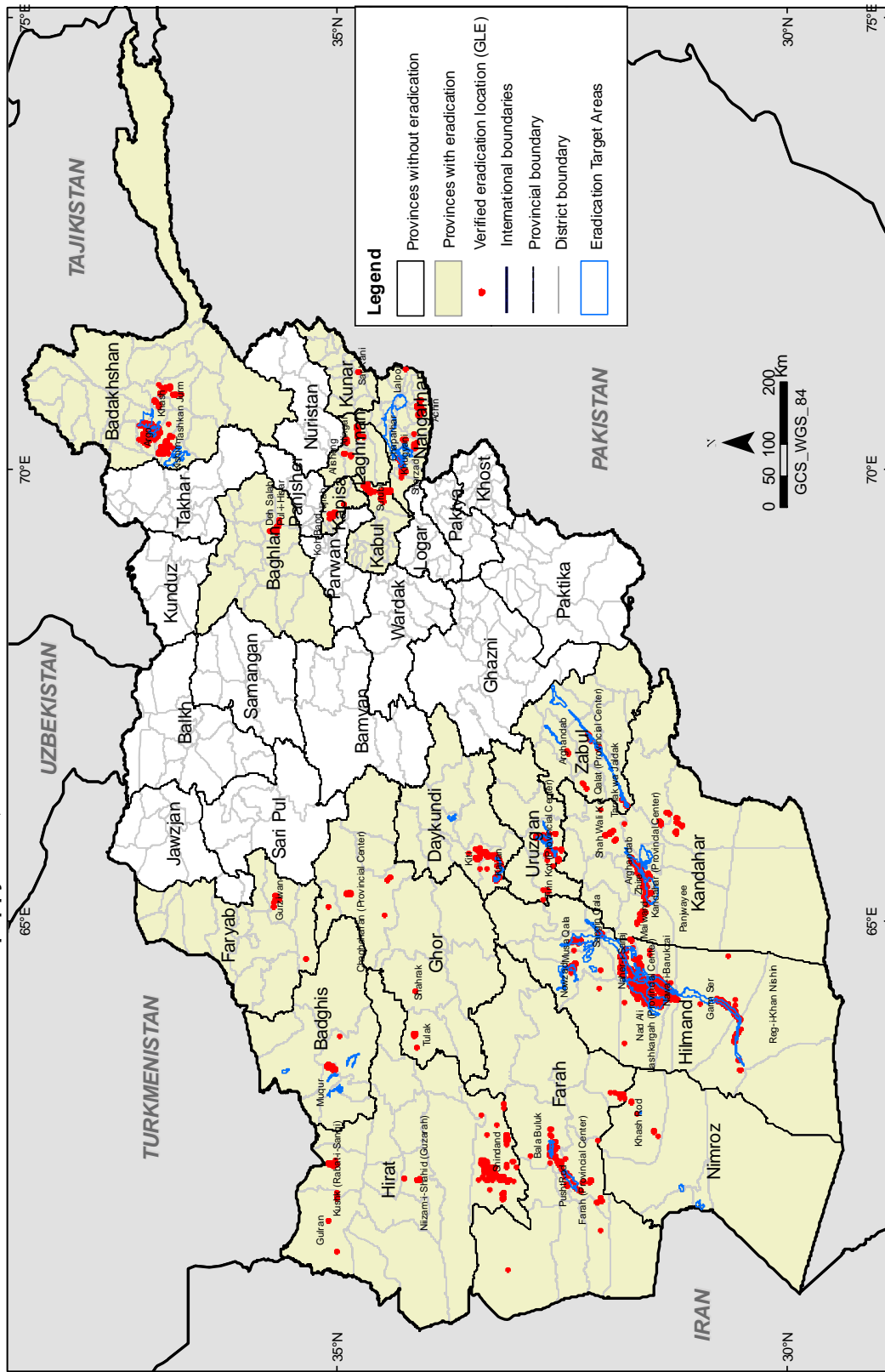
Table 8: Governor-led Eradication by province, 2012

Province	Eradication verified (hectares)	No. of fields eradication reported	No. of villages eradication reported
Badakhshan	1,784	4,871	208
Badghis	53	40	5
Baghlan	252	435	57
Day Kundi	236	807	13
Farah	316	700	28
Faryab	50	226	19
Ghor	11	47	8
Hilmand	3,637	6,594	289
Hirat	600	2,484	69
Kabul	103	937	35
Kandahar	922	1,364	106
Kapisa	54	731	11
Kunar	70	313	26
Laghman	76	460	7
Nangarhar	784	3,756	65
Nimroz	148	238	9
Uruzgan	485	1,259	42
Zabul	88	224	30
Grand Total	9,672	25,486	1,027

Figure 10: Eradication comparison, by province, 2011 and 2012



Locations of Governor-led eradication of poppy fields, 2011



Source: MCN - UNODC Afghanistan Eradication Survey 2011
 Note: The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations.

Opium prices decreased slightly in 2012

In 2012, opium prices remained high but decreased in all regions. MCN/UNODC has monitored opium prices in selected provinces of Afghanistan on a monthly basis since 1994 (18 provinces as of September 2011). In 2008/2009, opium prices were at a low level but increased after that, most noticeably in the Eastern, Southern and Western regions, before reaching a maximum in 2011 after the unusually poor harvest caused by a disease of the opium poppy.

The high level of opium prices in 2011 was one of the principal factors in the increase in opium poppy cultivation in 2012. Over the same period, price differences between regions became more pronounced.

In 2011, opium prices started to decrease around harvest time in some regions but remained volatile and at a higher level than in any year since 2005. This decrease can be explained by the relatively good 2011 harvest. Opium prices in 2012 have decreased particularly in the Western and Southern regions. Future trends will reveal whether this is a sign of stabilization in the opium market or merely a temporary phenomenon caused by the relatively poor 2012 harvest.

Figure 8: Dry opium prices reported by traders, by region, January 2005 to September 2012
(United States dollars per kilogram)

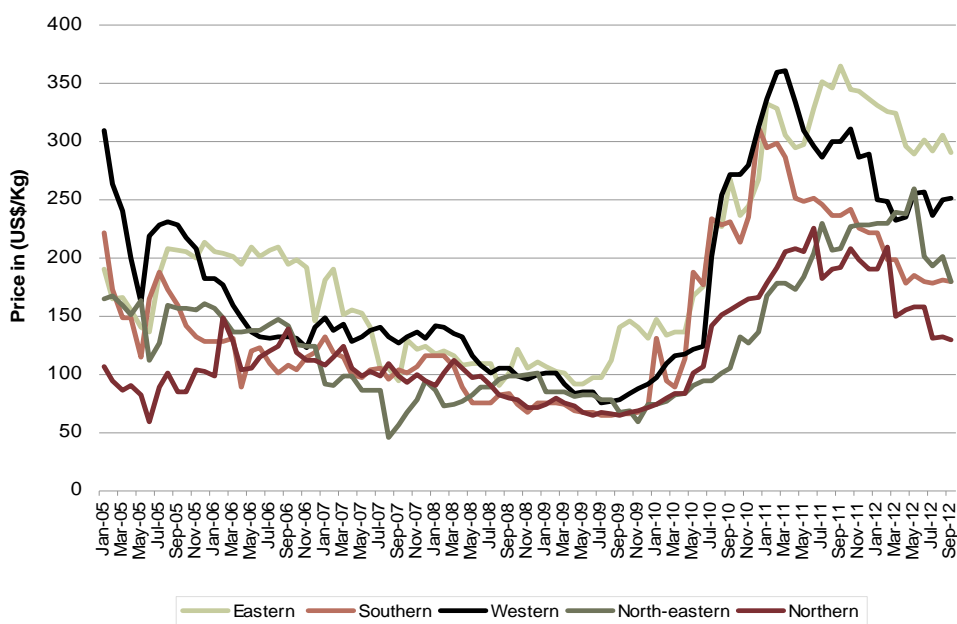
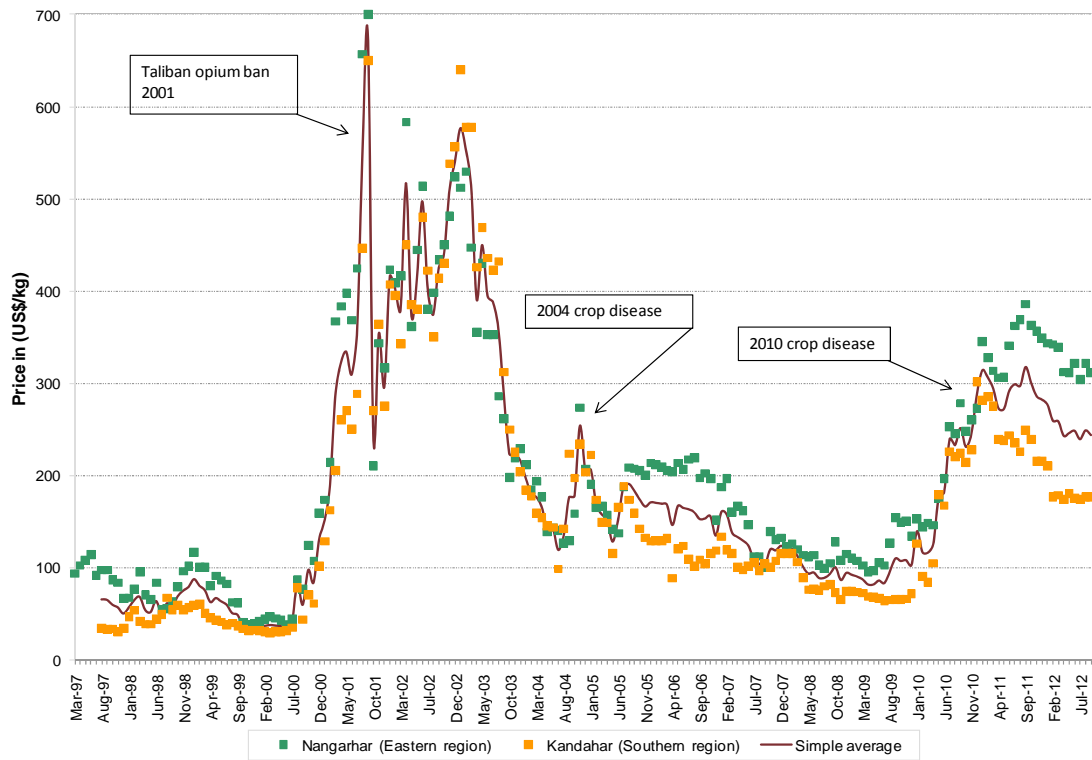


Figure 9: Opium prices reported by traders, Nangarhar and Kandahar provinces, March 1997 to September 2012 (United States dollars per kilogram)



Nominal prices converted to US\$ at local 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) 2011	Average dry opium price (US\$/kg) 2012	Change 2011-2012 (%)
Central	255	196	-23%
Eastern	290	291	1%
North-eastern	218	182	-16%
Northern	238	151	-37%
Southern	232	173	-26%
Western	296	245	-17%
National average weighted by production*	241	196	-19%

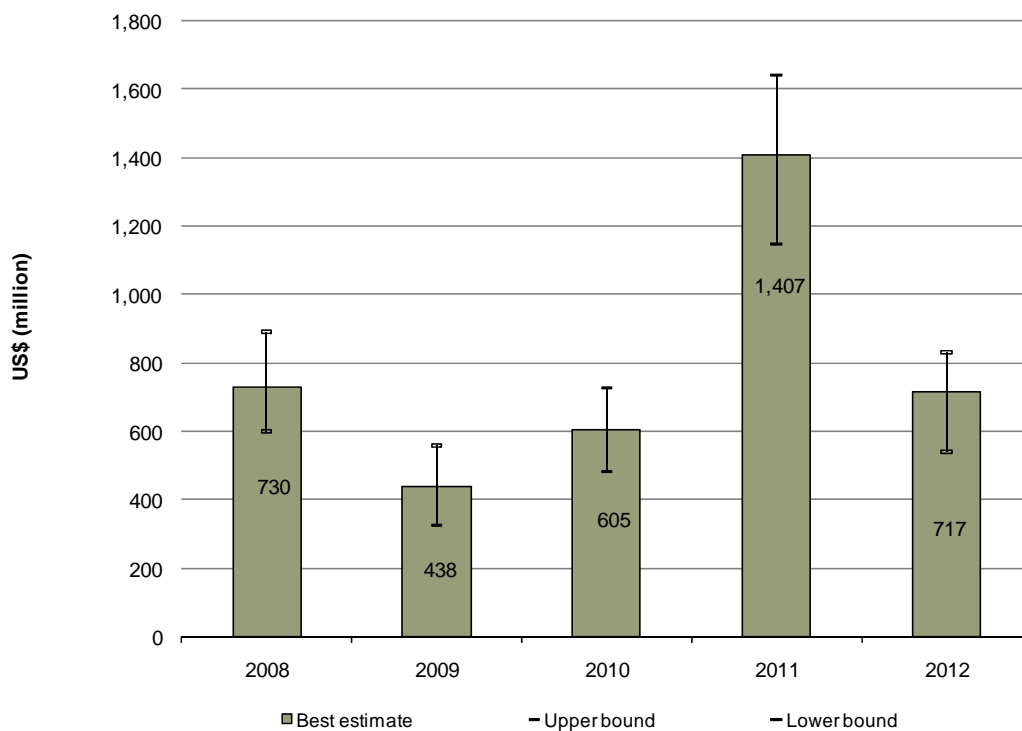
* Prices for the Central region were taken from the annual village survey as there is no monthly opium price monitoring in that region. Prices for all other regions were derived from the opium price monitoring system and refer to the month when the opium harvest actually took place in different regions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

Farm-gate value of opium production decreased by 49% in 2012

Amounting to US\$ 717 million, the farm-gate value of opium production in 2012 fell by 49% in comparison to its 2011 level. Equivalent to about 4% of estimated GDP, 2012 farm-gate value was at the same level as 2010 when opium production decreased due to a disease of the opium poppy.

Similarly, the per-hectare income from opium cultivation decreased by 57% from 2011 to 2012 (US\$ 10,700 and US\$ 4,600, respectively) to virtually the same level as in 2010 (US\$ 4,700).

Figure 10: Farm-gate value of potential opium production, 2008-2012 (US\$ million)

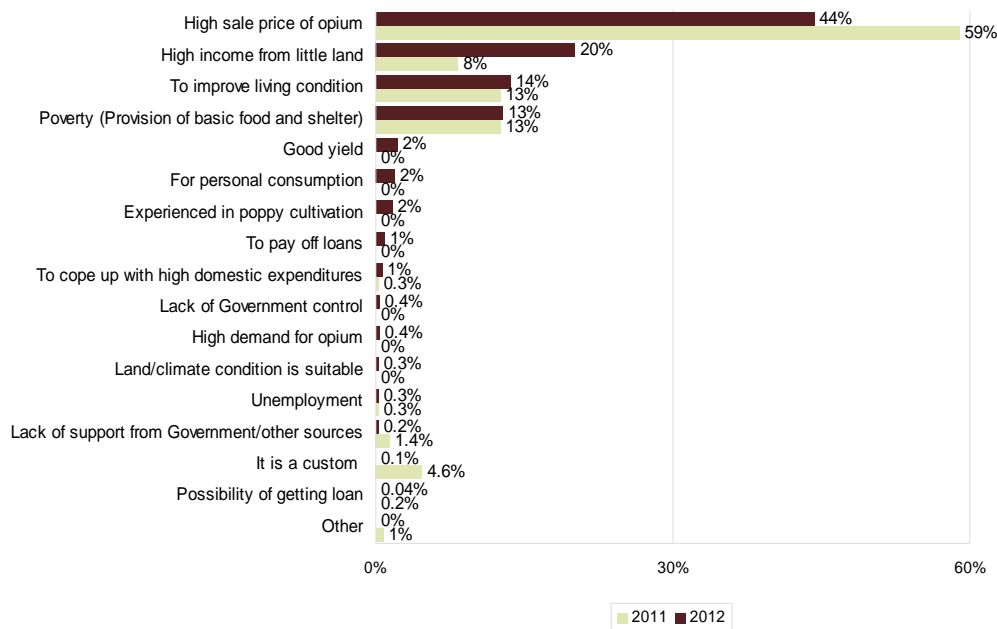


Note: The high-low bars represent the upper and lower bounds of the estimation range.

Reasons for cultivating opium poppy

Its high sale price continued to be the most important reason for cultivating opium poppy cited by farmers in 2012 (44%), as it was in 2011 (59%). High income from little land, improving living conditions, and the provision of basic food and shelter for the family were other important reasons given.

Figure 11: Reasons for cultivating opium in 2011-2012 (n = 396 farmers in 2012)



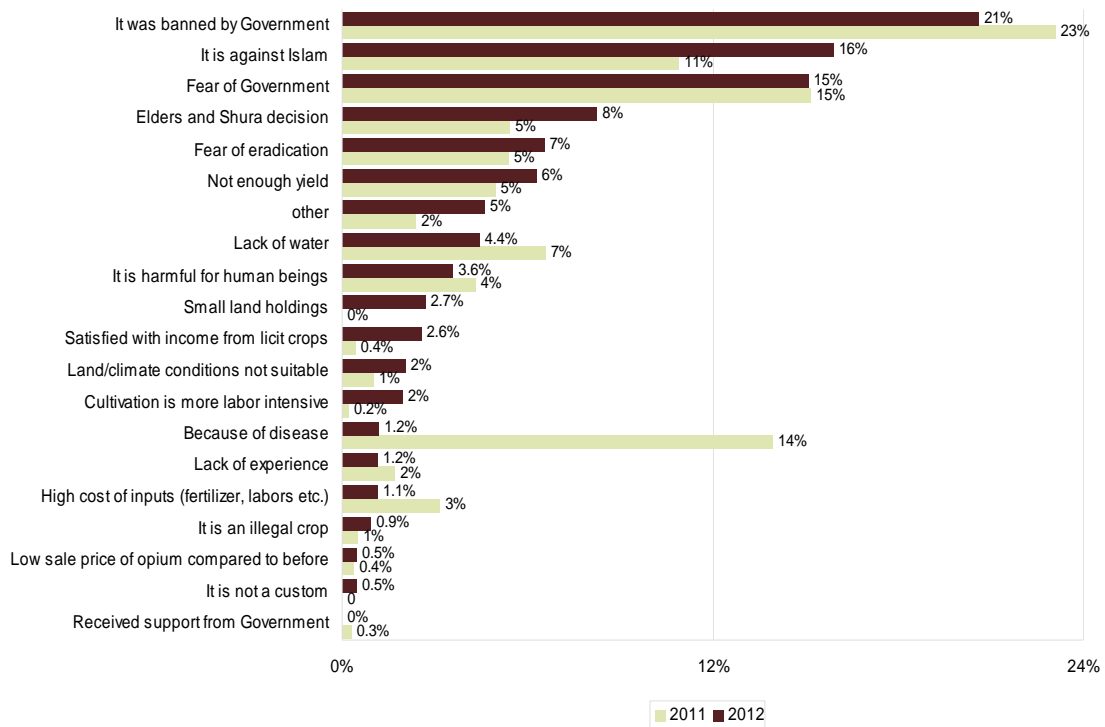
Reasons for ceasing opium cultivation

In 2012, farmers who had ceased cultivating opium in 2011 or before were asked about their major reasons for doing so. The Government ban on opium cultivation was mentioned by 21% of respondents in 2012 and 23% in 2011, making it the most frequently cited reason for ceasing opium cultivation. Religious belief (opium cultivation being against Islam) was the second most cited reason (16%) in 2012, while fear of the Government was the third (15%).

A major change when compared to 2011 was ceasing opium cultivation because of the fear of plant diseases, with only 1.2% of farmers mentioning that they ceased opium cultivation for that reason in 2012, whereas 14% cited it in 2011. The relatively high proportion of farmers citing plant disease in 2011 seemed to reflect their experience, or at least knowledge, of the widespread disease that affected poppy in 2010. Apparently this effect waned after 2011 as the proportion of farmers mentioning it was relatively low in 2012.

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 reasons mentioned for ceasing opium cultivation.

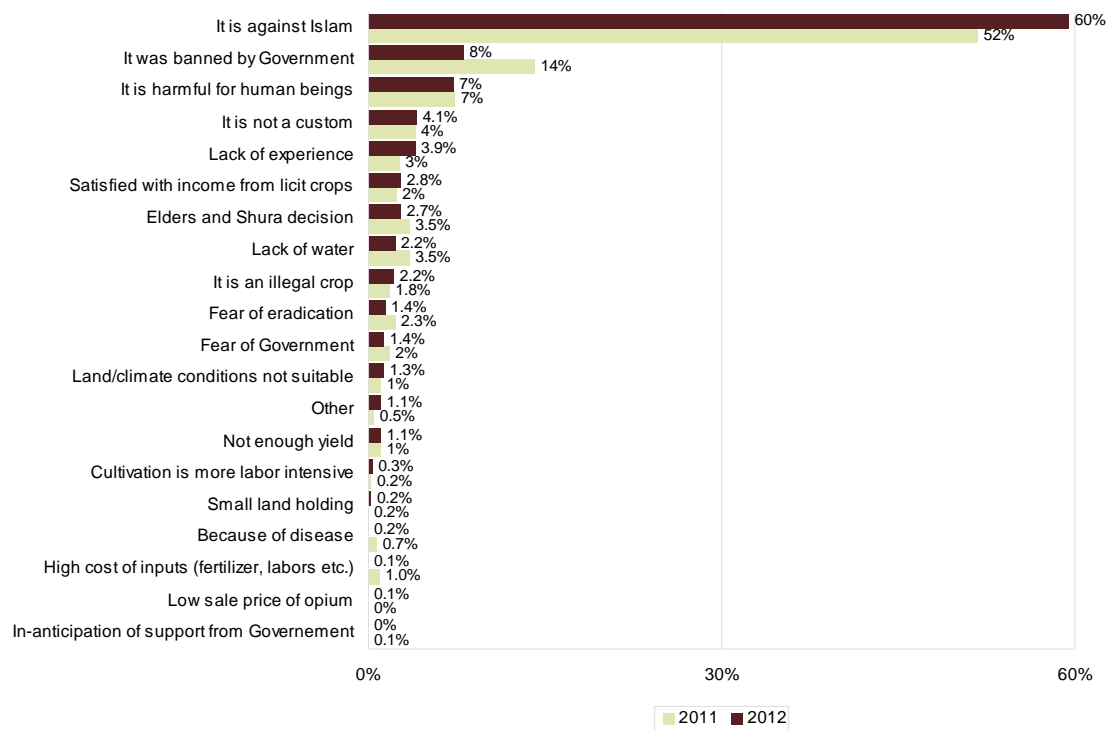
Figure 12: Reasons for ceasing opium cultivation in or before 2011 (n =1071 farmers in 2012), 2011-2012



Reasons for never cultivating opium poppy

In 2011 and 2012, religious belief was the principal reason for never having cultivated opium poppy. Some 60% of farmers in 2012 and 52% in 2011 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 13: Reasons for never cultivating opium in 2011-2012 (n = 2962 farmers in 2012)



The link between opium cultivation and lack of security

In 2012, 95% of total opium cultivation in Afghanistan took place in the Southern and Western regions: 72% was concentrated in Hilmand, Kandahar, Uruzgan, Day Kundi, and Zabul provinces in the Southern region; 23% 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.



UNODC

United Nations Office on Drugs and Crime



Islamic Republic of Afghanistan
Ministry of Counter Narcotics

Vienna International Centre, PO Box 500, 1400 Vienna, Austria
Tel.: (+43-1) 26060-0, Fax: (+43-1) 26060-5866, www.unodc.org

Banayee Bus Station, Jalalabad Main Road
9th District, Kabul, Afghanistan
Tel.: (+93) 799891851, www.mcn.gov.af