South-East Asia: Opium Survey 2011

15 December 2010

Launch at the Foreign Correspondents’ Club of Thailand
PRESENTATION STRUCTURE

1. BIG PICTURE
2. REPORT OVERVIEW
3. MYANMAR
4. LAO PDR
5. CONCLUSIONS
1. BIG PICTURE
The Big Picture

“Containment” has worked during past decade

- Number of users level at 4.5% adult population
- Opiate cultivation declines globally over past 2 decades
- Coca/cocaine declines globally over past 2 decades
- Cultivation is limited to a few countries
- ATS use stabilizes across globe

WARNING SIGNS

- SE Asia: soaring production, trafficking, use of ATS
- SE Asia: resurgence of opium cultivation
2. REPORT OVERVIEW
CULTIVATION

• Has doubled in SE Asia since 2006
• **Myanmar** is still world’s second largest illicit poppy cultivator after Afghanistan (approx. 23% world cultivation; approx. 10% world production)
• Myanmar: 2011 trend = up
• Lao PDR: 2011 trend = up
CULTIVATION – SE Asia

Opium poppy cultivation in South East Asia (hectares), 1998 - 2011

MYANMAR
91% SE Asia cultivation
96% SE Asia production
CULTIVATION – Global comparisons

Opium poppy cultivation in major cultivating countries (ha), 1998 - 2011

- Afghanistan
- Myanmar
- Lao PDR

Hectares

- 0
- 50,000
- 100,000
- 150,000
- 200,000
- 250,000

CULTIVATION
### CULTIVATION

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2011</th>
<th>Change from</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opium poppy cultivation</td>
<td>41,389 ha</td>
<td>47,917 ha</td>
<td>+16%</td>
</tr>
<tr>
<td>Lao PDR</td>
<td>3,000 ha</td>
<td>4,100 ha</td>
<td>+37%</td>
</tr>
<tr>
<td>Thailand</td>
<td>289 ha</td>
<td>217 ha</td>
<td>-25%</td>
</tr>
<tr>
<td>Myanmar</td>
<td>38,100 ha</td>
<td>43,600 ha</td>
<td>+14%</td>
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</table>

### PRODUCTION

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2011</th>
<th>Change from</th>
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</thead>
<tbody>
<tr>
<td>Potential production of opium</td>
<td>603 mt</td>
<td>638 mt</td>
<td>+6%</td>
</tr>
<tr>
<td>Lao PDR</td>
<td>18 mt</td>
<td>25 mt</td>
<td>+37%</td>
</tr>
<tr>
<td>Thailand</td>
<td>5 mt</td>
<td>3 mt</td>
<td>-25%</td>
</tr>
<tr>
<td>Myanmar</td>
<td>580 mt</td>
<td>610 mt</td>
<td>+5%</td>
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</table>

### MARKET VALUE

<table>
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<tr>
<th></th>
<th>2010</th>
<th>2011</th>
<th>Change from</th>
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<tbody>
<tr>
<td>Total potential value of opium production</td>
<td>&gt; US$ 219 million</td>
<td>&gt; US$ 319 million</td>
<td>+46%</td>
</tr>
<tr>
<td>Of which</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lao PDR</td>
<td>US$ 30 million</td>
<td>US$ 40 million</td>
<td>+34%</td>
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<tr>
<td></td>
<td>US$ 12 million</td>
<td>US$ 4 million</td>
<td>-65%</td>
</tr>
<tr>
<td>Thailand</td>
<td>US$ 177 million</td>
<td>US$ 275 million</td>
<td>+56%</td>
</tr>
<tr>
<td>Myanmar</td>
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</tbody>
</table>
3. LAO PDR
LAO PDR – Cultivation
LAO PDR – Cultivation

Cultivation = 4,100 ha
Production = 25 mt
4. MYANMAR
Satellite Survey

- Detailed satellite images
- Statistical sampling approach
- Systematic field verification of all satellite images
- Socio-economic survey of villages

Cultivation = 43,600 ha
Production = 610 mt
Cultivation
5. CONCLUSIONS
Conclusions

1. What is driving opium poppy increase:
   a) Food insecurity
   b) Poverty
   c) Conflict
   d) High prices

2. Few international organizations are currently engaging in Shan State in AD

3. Investment in AD by the international community is an investment in peace and security in the border areas of Myanmar
THANK YOU

www.unodc.org/eastasiaandpacific