

3.1 Opium/heroin

OPIUM

GLOBAL ILLICIT CULTIVATION OF OPIUM POPPY AND PRODUCTION
OF OPIUM, 1990-2003

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
CULTIVATION⁽¹⁾ IN HECTARES														
SOUTH-WEST ASIA														
Afghanistan	41,300	50,800	49,300	58,300	71,470	53,759	56,824	58,416	63,674	90,583	82,171	7,606	74,100	80,000
Pakistan	7,488	7,962	9,493	7,329	5,759	5,091	873	874	950	284	260	213	622	2,500
Subtotal	48,788	58,762	58,793	65,629	77,229	58,850	57,697	59,290	64,624	90,867	82,431	7,819	74,722	82,500
SOUTH-EAST ASIA														
Lao PDR	30,580	29,625	19,190	26,040	18,520	19,650	21,601	24,082	26,837	22,543	19,052	17,255	14,000	12,000
Myanmar	150,100	160,000	153,700	165,800	146,600	154,070	163,000	155,150	130,300	89,500	108,700	105,000	81,400	62,200
Thailand ⁽²⁾	1,782	3,727	3,016	998	478	168	368	352	716	702	890	820	750	
Viet Nam ⁽²⁾	18,000	17,000	12,199	4,268	3,066	1,880	1,743	340	442	442				
Subtotal	200,462	210,352	188,105	197,106	168,664	175,768	186,712	179,924	158,295	113,187	128,642	123,075	96,150	74,200
LATIN AMERICA														
Colombia ⁽³⁾		1,160	6,578	5,008	15,091	5,226	4,916	6,584	7,350	6,500	6,500	4,300	4,100	4,100
Mexico ⁽⁴⁾	5,450	3,765	3,310	3,960	5,795	5,050	5,100	4,000	5,500	3,600	1,900	4,400	2,700	4,800
Subtotal	5,450	4,925	9,888	8,968	20,886	10,276	10,016	10,584	12,850	10,100	8,400	8,700	6,800	8,900
OTHER														
Combined ⁽⁵⁾	8,054	7,521	2,900	5,704	5,700	5,025	3,190	2,050	2,050	2,050	2,479	2,500	2,500	3,000
GRAND TOTAL	262,754	281,560	259,686	277,407	272,479	249,919	257,615	251,848	237,819	216,204	221,952	142,094	180,172	168,600

POTENTIAL PRODUCTION IN METRIC TONS														
OPIUM														
SOUTH-WEST ASIA														
Afghanistan	1,570	1,980	1,970	2,330	3,416	2,335	2,248	2,804	2,693	4,565	3,276	185	3,400	3,600
Pakistan	150	160	181	161	128	112	24	24	26	9	8	5	5	52
Subtotal	1,720	2,140	2,151	2,491	3,544	2,447	2,272	2,828	2,719	4,574	3,284	190	3,405	3,652
SOUTH-EAST ASIA														
Lao PDR	202	196	127	169	120	128	140	147	124	124	167	134	112	120
Myanmar	1,621	1,728	1,660	1,791	1,583	1,664	1,760	1,676	1,303	895	1,087	1,097	828	810
Thailand ⁽²⁾	20	23	14	17	3	2	5	4	8	8	6	6	9	
Viet Nam ⁽²⁾	90	85	61	21	15	9	9	2	2	2				
Subtotal	1,933	2,032	1,862	1,998	1,721	1,803	1,914	1,829	1,437	1,029	1,260	1,237	949	930
LATIN AMERICA														
Colombia ⁽³⁾		16	90	68	205	71	67	90	100	88	88	58	50	50
Mexico	62	41	40	49	60	53	54	46	60	43	21	71	47	84
Subtotal	62	57	130	117	265	124	121	136	160	131	109	129	97	134
OTHER														
Combined ⁽⁵⁾	45	45	-	4	90	78	48	30	30	30	38	40	40	50
GRAND TOTAL	3,760	4,274	4,143	4,610	5,620	4,452	4,355	4,823	4,346	5,764	4,691	1,596	4,491	4,765
HEROIN														
Potential HEROIN	376	427	414	461	562	445	436	482	435	576	469	160	449	477

(1) Potentially harvestable, after eradication.

(2) Due to low levels of production, cultivation and production for Viet Nam as of 2000 and for Thailand as of 2003 were included in the category "Other countries".

(3) According to the Government of Colombia, cultivation covered 7,350 ha and 6,500 ha and production amounted to 73 mt and 65 mt in 1998 and 1999 respectively.

(4) Sources: As its survey system is under development, the Govt of Mexico indicates it can neither provide cultivation estimates nor endorse those published by UNODC which are derived from US Government surveys.

(5) Includes countries such as Russia, Ukraine, Central Asia, Caucasus region, Egypt, Peru, Viet Nam (as of 2000) and Thailand (as of 2003)

3.1.1. Afghanistan

During the 1990s, Afghanistan firmly established itself as the largest source of illicit opium and its derivative, heroin. In 2003, opium production in Afghanistan still accounted for more than three quarters of the world's illicit opium production. In October 2003, UNODC and the Afghan government conducted a farmers' intentions survey that revealed that almost 70% of the farmers interviewed in the opium growing regions of Afghanistan intended to increase poppy cultivation in 2004, while only 4% considered reducing it.

Results of the 2003 UNODC Afghanistan Annual Opium Survey

(1) *Opium poppy cultivation (hectares) is spreading*

In 2003 the total area under opium poppy cultivation in Afghanistan increased by 8%, from 74,000 hectares in 2002 to 80,000 hectares in 2003. The current level ranks third in the country's recent history.

(2) *Geographical spread has reached 28 provinces (out of 32)*

There has been a clear and accelerating extension of opium cultivation to previously unaffected, or marginally affected areas. The number of provinces where opium poppy cultivation was reported has steadily increased: from 18 provinces in 1999, to 23 in 2000, up to 24 in 2002 and to a staggering 28 provinces in 2003 (out of a total of 32).

(3) *Opium production (metric tons) is also increasing*

Potential opium production amounted to 3,600 tons in 2003, an increase of 6% compared to last year's 3,400 tons. The 2003 harvest is the second highest recorded so far in Afghanistan.

(4) *Opium prices are declining, though still high*

Although about ten times higher than during the 1990s, when it was around US\$ 30 per kg, the average price of fresh opium recorded in 2003 of US\$ 283 per kg, represents a 19% decrease over last year's price of US\$ 350. The decline of 2003 opium prices in Afghanistan resulted in a 15% reduction in the related income to farmers compared to last year. As of February 2004, the price continued to decrease to an average US\$176/kg for dry opium.

(5) *264,000 families now grow opium poppy*

The number of opium farmers was estimated at about 264,000 families, cultivating an average of 0.3 hectare of opium poppy per family. Considering that the average family consists of 6-7 people, it can be estimated that opium poppy cultivation plays a direct role in the livelihood of about 1.7 million rural people, or about 7% of the total population of Afghanistan.

(6) *Country's opium income is down 15%*

Despite the higher output, the aggregate value of this year's Afghan opium harvest (at farm-gate prices) declined to US\$ 1.02 billion, compared to US\$ 1.2 billion in 2002 (-15%). Almost 80% of farmers income was generated in the traditional opium producing areas of the Eastern and Southern regions.

(7) *Per capita income from opium is several times GDP per capita*

The 2003 harvest represents, on average, a potential income of about US\$ 3,900 per opium-growing family. The potential opium income per capita for the 1.7 million people averaged US\$ 594. In comparison, on the basis of a population estimated at 24 million and a GDP estimated at US\$ 4.4 billion, Afghanistan had a GDP per capita of about US\$ 184 in 2002.

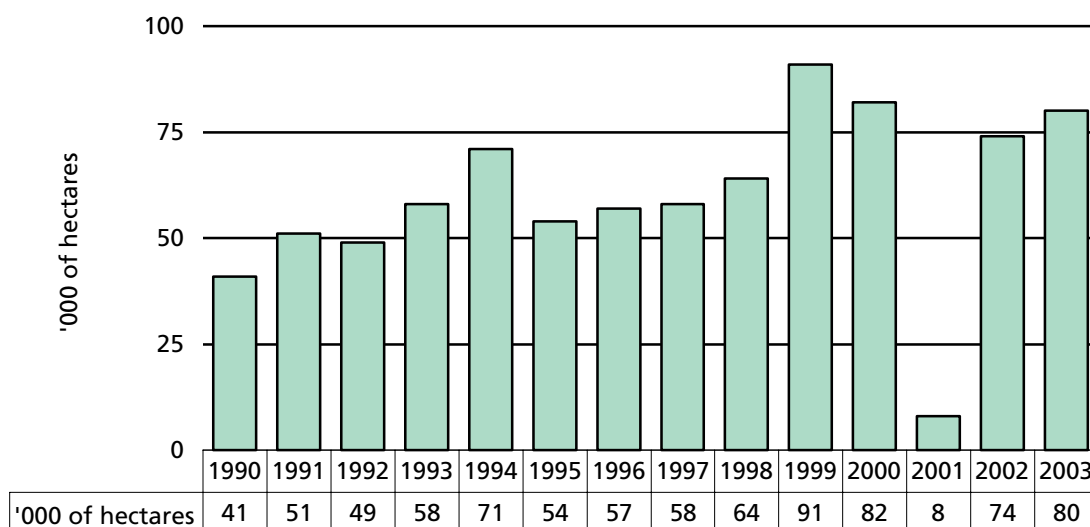
(8) *Eradication*

Eradication activities were conducted by the Afghan authorities in some provinces. In total, 21,430 ha were eradicated in this campaign. The Afghanistan opium survey did not assess the effectiveness of the eradication campaign. The timing of the survey and the methodology employed ensured that the results were post-eradication and reflected the net amount of opium poppy which was harvestable.

Fact Sheet : Afghanistan 2003

Source: UNODC/CND survey report, available at www.unodc.org/unodc/en/crop_monitoring

Opium poppy cultivation:	80,000 ha against 74,000 ha in 2002 (8% increase)
2002-2003 trends in some provinces:	Hilmand: - 49% Kandahar: - 23% Nangarhar: - 4% Badakhshan: + 55%
Potential opium production:	3,600 metric tons against 3,400 metric tons in 2002 (6% increase)
Number of farmers cultivating opium:	264,000 farmers
Population of farmers cultivating opium: millions)	1,700,000 rural people (7% of total population of 24 millions)
Opium poppy cultivation in % of the total Arable land:	1% of total arable land
Opium poppy cultivation in % of irrigated Land:	3% of irrigated land
Average poppy farmers land devoted to opium opium poppy cultivation: 0.3 ha	
Average fresh opium price at harvest:	US\$283/kg
Total farmers' income from opium:	US\$1 billion
In % of 2002 Afghan GDP:	23% (with a GDP of US\$ 4.4 billion)
Average annual farmer income from opium:	US\$ 3,900
Average opium income per capita:	US\$594 (2002 GDP per capita: US\$184)
Reported eradication:	21,430 ha
As of October 2003, % of farmers who intended to increase opium poppy cultivation in 2004:	70%

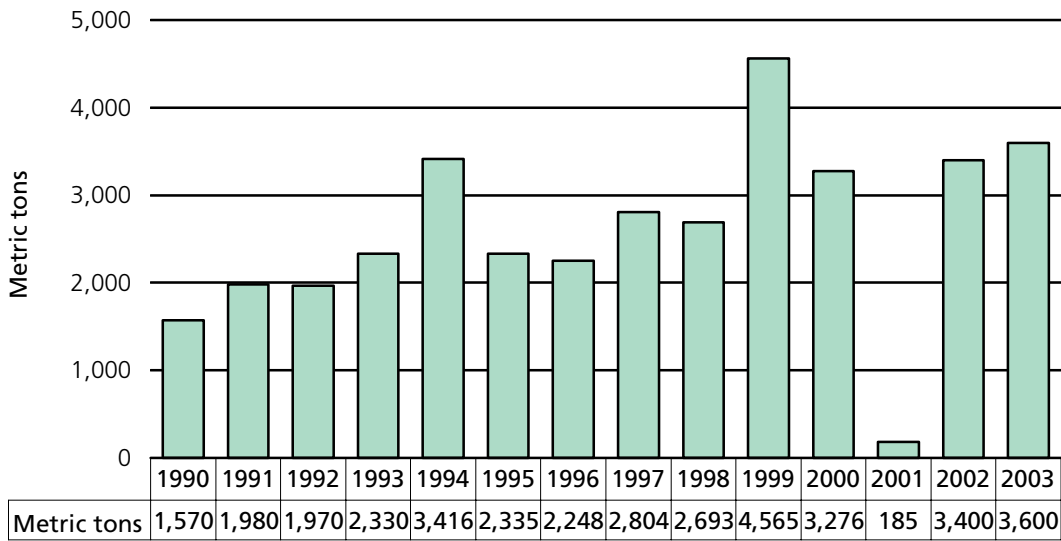
*Graphs, tables, maps: Afghanistan***Afghanistan, Opium Poppy Cultivation, in thousands of ha, 1990 to 2003****Afghanistan, largest opium poppy cultivating provinces in 2003 (ha)**

Provinces	2002	2003	one year change	% of total in 2003	Cumulative % in 2003
Nangarhar	19,780	18,904	-4%	23%	23%
Hilmand	29,950	15,371	-49%	19%	43%
Badakhshan	8,250	12,756	55%	16%	58%
Uruzgan	5,100	7,143	40%	9%	67%
Ghor	2,200	3,782	72%	5%	72%
Kandahar	3,970	3,055	-23%	4%	76%
Rest of the country	4,850	19,471	301%	24%	100%
Rounded Total	74,000	80,000	8%		

Afghanistan, potential opium production by region and at national level in 2003

Region	Yield irrigated (kg/ha)	Yield rainfed (kg/ha)	Cult. irrigated (ha)	Cult. rainfed (ha)	Prod. irrigated (tons)	Prod. rainfed (tons)	Prod. total (tons)
Center (Bamyan, Ghor, Kabul, Kapisa, Wardak)	46	28	7,605	85	350	2	352
North East (Badakhshan, Baghlan, Kunduz, Takhar)	41	24	12,559	1,224	515	29	544
North West (Baghis, Balkh, Faryab, Jawzjan, Samangan, Sari Pul)	43	34	3,618	842	156	29	184
South East (Khost, Kunar, Laghman, Nangarhar, Nuristan, Paktya)	51	32	24,103	478	1,229	15	1,245
South West (Farah, Hilmand, Hirat, Kandahar, Nimroz, Uruzgan, Zabul)	43	18	29,815	156	1,282	3	1,285
Rounded total			77,700	2,780	3,530	80	3,600
Average Weighted Yield	45	29					45

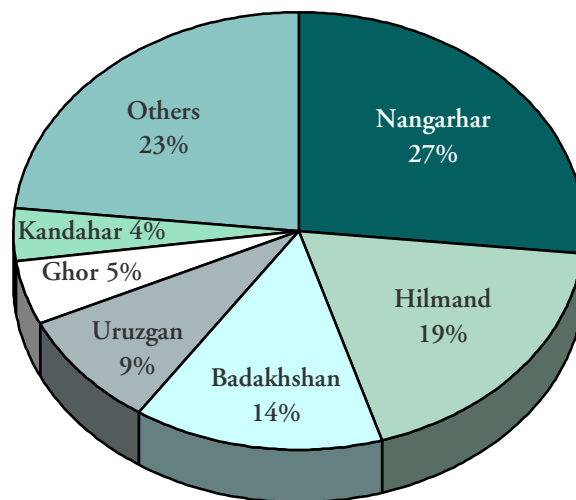
Afghanistan, Opium production, 1990 to 2003



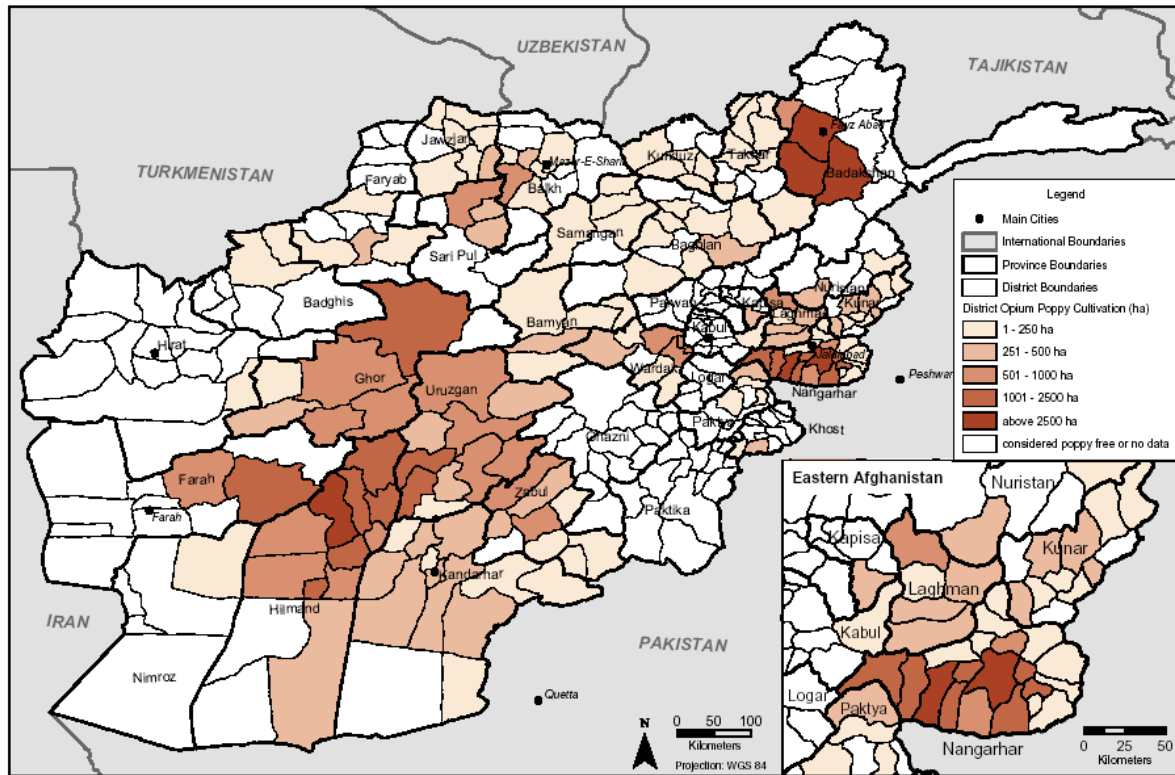
Afghanistan, largest opium producing provinces in 2003

Provinces	Opium production in tons	% of total
Nangarhar	964	27%
Hilmand	676	19%
Badakhshan	508	14%
Uruzgan	314	9%
Ghor	174	5%
Kandahar	134	4%
Others	849	23%
Rounded Total	3,600	100%

Afghanistan, largest opium producing provinces in 2003

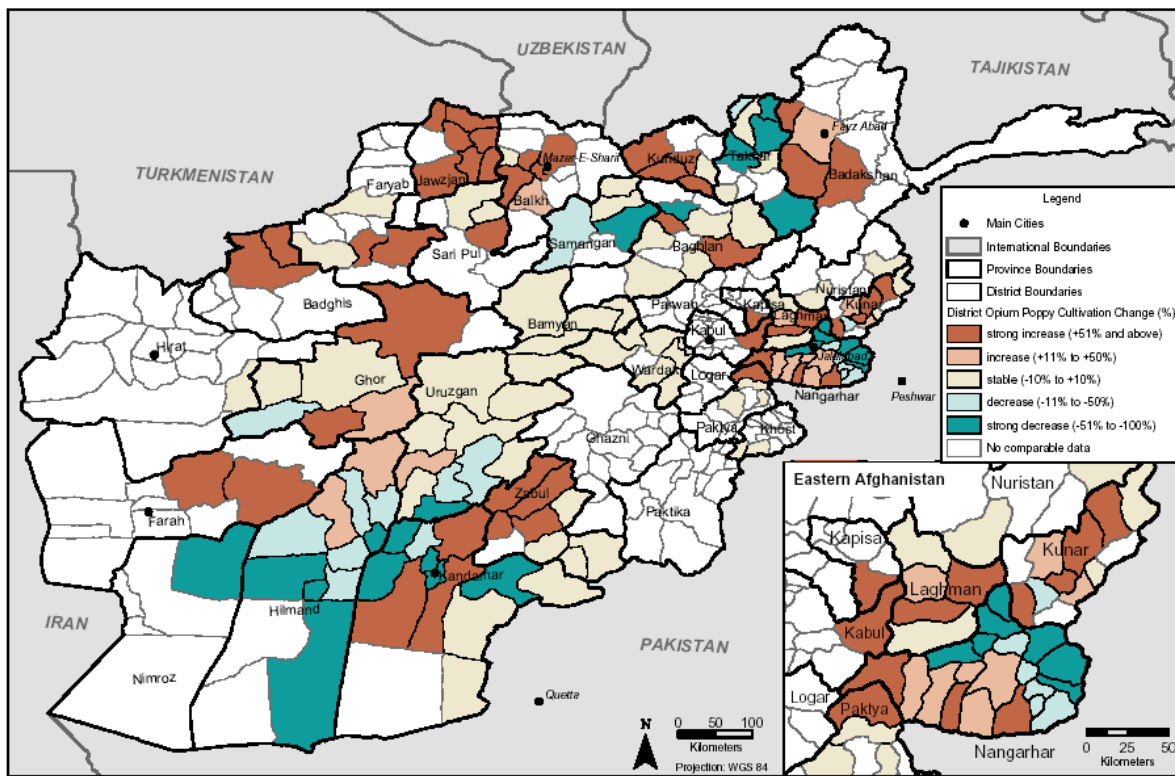


Afghanistan, opium poppy cultivation 2003



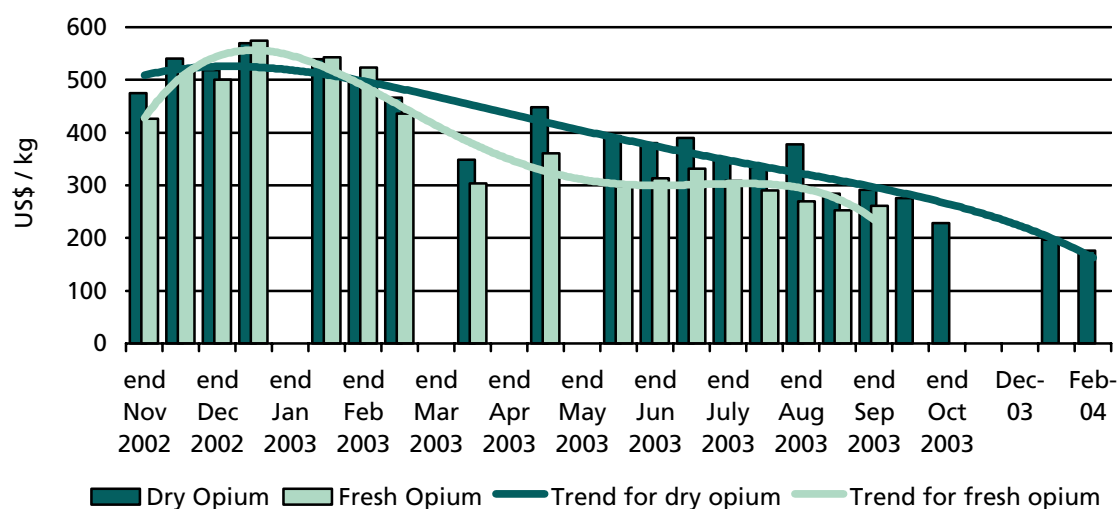
Source: CND - UNODC Afghanistan Opium Survey 2003

Afghanistan, opium poppy cultivation changes 2002 - 2003



Source: CND - UNODC Afghanistan Opium Survey 2003

Afghanistan, farmgate prices for opium, US\$/kg (all observations Nov. 2002 - Mid. Oct 2003)



Source: UNODC (ICMP-AFG/F98 Monitoring of opium production in Afghanistan)

Afghanistan, opium farmgate prices in 2003 (\$US/kg)

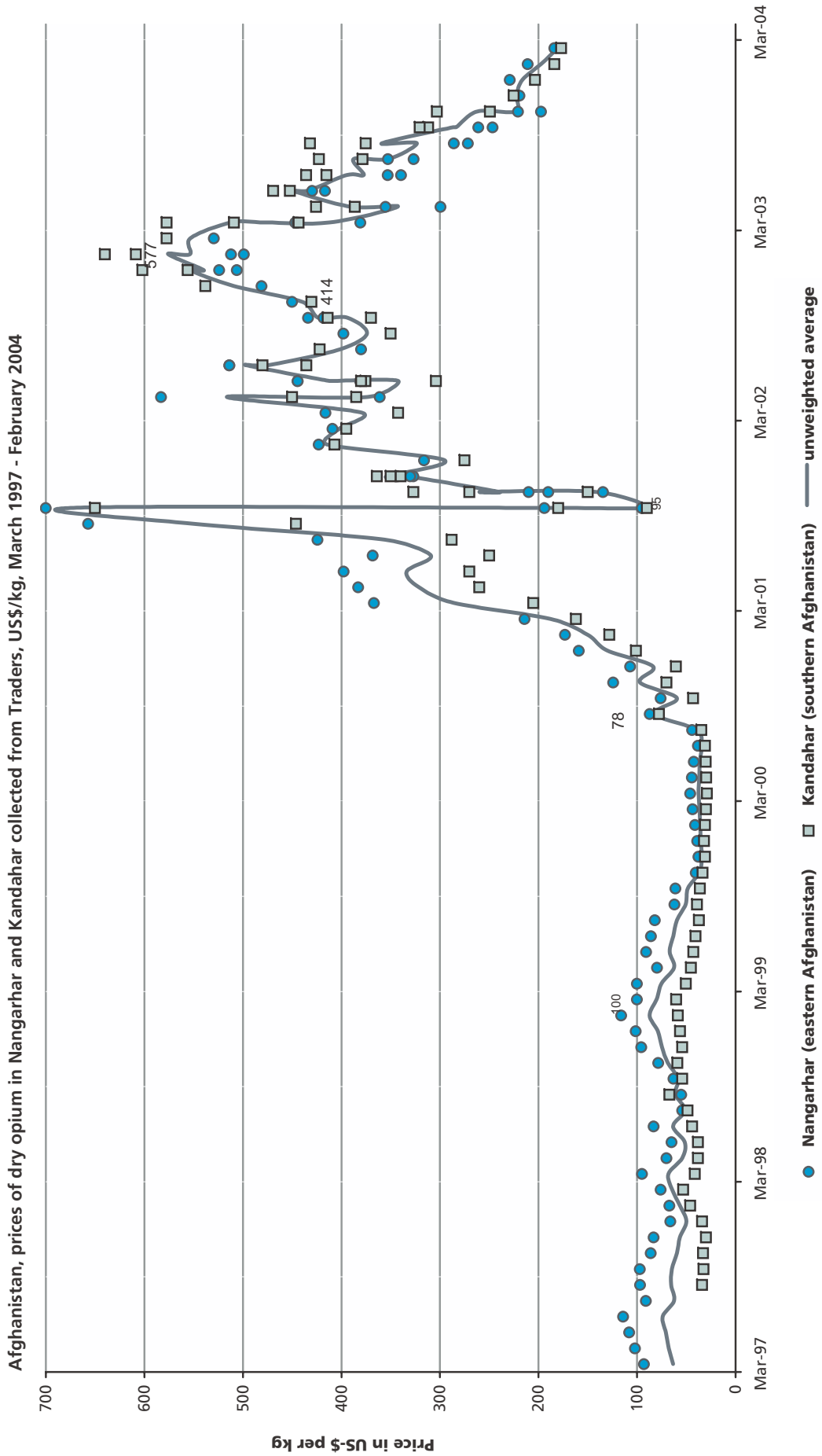
Period	Dry opium	n	Fresh opium	n
End Nov 2002	475	28	426	51
Mid Dec 2002	540	47	521	47
End Dec 2002	519	40	500	46
Mid Jan 2003	570	47	575	29
End Jan 2003				
Mid Feb 2003	540	48	543	31
End Feb 2003	498	47	524	29
Mid Mar 2003	466	44	436	33
End Mar 2003				
Mid Apr 2003	348	42	304	31
End Apr 2003				
Mid May 2003	448	40	361	41
End May 2003				
Mid Jun 2003	393	32	297	32
End Jun 2003	380	37	313	39
Mid July 2003	390	37	332	39
End July 2003	351	35	308	37
Mid Aug 2003	334	37	290	39
End Aug 2003	378	37	270	39
Mid Sep 2003	285	35	253	37
End Sep 2003	291	35	261	37
Mid Oct 2003	276	33		
End Oct 2003	228	33		
Nov 2003				
Dec 2003				
Jan 2004	197	26		
Feb 2004	176	20		

Notes: n = number of observations, empty cells = no data collection during the period considered. All transactions in the three provinces are reported by surveyors to be made in Pakistani Rupees. The prices were converted in US\$, using the exchange rate prevailing on the day each observation was made.

Afghanistan: Prices of dry opium obtained from traders in Nangarhar and Kandahar in US-\$ per kg

1997				1998				1999				2000			
Date	Nangarhar	Kandahar	Simple Average	Date	Nangarhar	Kandahar	Simple Average	Date	Nangarhar	Kandahar	Simple Average	Date	Nangarhar	Kandahar	Simple Average
Jan-97				Jan-98	67	46	57	Jan-99	116	59	87	Jan-00	41	31	36
Feb-97				Feb-98	76	53	65	Feb-99	100	60	80	Feb-00	43	30	37
Mar-97	93		63	Mar-98	95	41	68	Mar-99	100	50	75	Mar-00	46	29	38
Apr-97	102		68	Apr-98	70	38	54	Apr-99	80	45	62	Apr-00	44	30	37
May-97	108		71	May-98	65	38	52	May-99	91	43	67	May-00	42	30	36
Jun-97	114		74	Jun-98	83	44	64	Jun-99	86	41	63	Jun-00	38	31	35
Jul-97	91		62	Jul-98	54	49	51	Jul-99	82	37	59	Jul-00	44	35	39
Aug-97	97	34	65	Aug-98	55	67	61	Aug-99	62	39	51	Aug-00	87	78	82
Sep-97	97	33	65	Sep-98	63	54	59	Sep-99	61	36	49	Sep-00	76	43	60
Oct-97	86	33	60	Oct-98	78	59	69	Oct-99	40	33	37	Oct-00	124	70	97
Nov-97	83	30	57	Nov-98	96	54	75	Nov-99	38	31	34	Nov-00	107	61	84
Dec-97	66	34	50	Dec-98	101	56	79	Dec-99	39	32	35	Dec-00	159	101	130

2001				2002				2003				2004				
Date	Nangarhar	Kandahar	Simple Average	Date	Nangarhar	Kandahar	Simple Average	Date	Nangarhar	Kandahar	Simple Average	Date	Nangarhar	Kandahar	Simple Average	
Jan-01	173	128	150	15-Jan-02	423	407	415	Mid Jan-03	512	640	576	Jan-04	211	184	197	
Feb-01	214	162	188	15-Feb-02	409	395	402	End Jan-03	499	609	554	Feb 04	184	177	180	
Mar-01	367	205	286	15-Mar-02	416	343	379	Mid Feb-03	529	577	553					
Apr-01	383	260	322	14-Apr-02	583	450	517	End Feb-03	447	577	512					
May-01	398	270	334	25-Apr-02	361	385	373	Mid Mar-03	445	509	477					
Jun-01	368	250	309	07-May-02	381	304	343	End Mar-03	381	444	412					
Jul-01	424	288	356	15-May-02	444	376	410	Mid Apr-03	299	386	343					
Aug-01	657	446	551	20-May-02	444	380	412	End Apr-03	355	426	390					
10-Sep-01	700	650	675	09-Jun-02	514	480	497	Mid May-03	430	469	449					
15-Sep-01	194	180	187	15-Jun-02	514	436	475	End May-03	416	452	434					
24-Sep-01	95	90	93	15-Jul-02	380	422	401	Mid Jun-03	353	436	394					
10-Oct-01	134	150	142	15-Aug-02	398	350	374	End Jun-03	339	415	377					
15-Oct-01	190	327		09-Sep-02	418	370	394	Mid Jul-03	353	423	388					
28-Oct-01	210	270		23-Sep-02	434	414	424	End Jul-03	327	379	353					
01-Nov-01	327	340		01-Oct-02	450	430	440	Mid Aug-03	272	375	323					
05-Nov-01	330	350		end Nov-02	481	538	510	End Aug-03	286	432	359					
19-Nov-01	343	364		mid Dec-02	506	602	554	Mid Sep-03	261	312	286					
15-Dec-01	316	275		end Dec-02	524	556	540	End Sep-03	247	321	284					
								Mid Oct-03	221	303	262					
								End Oct-03	197	249	223					
								Nov-03	219	225	222					
								Dec-03	229	203	216					



Afghanistan, eradication report from CND, in ha, 2003

Provincial Report	Hectares
Nangarhar	7,376
Kabul	43
Parwan	80
Helmand	8,500
Kandahar	2,719
Uruzgan	1,510
Zabul	1
Wardak (Maind Shaher)	9
Heart	932
Nimroz	260
Badghis	-
Ghor	-
Farah	-
Country Total	21,430

3.1.2. Myanmar

In Myanmar, the problem of opium and heroin has deep historical roots that reach back to the 19th century. The second source of illicit opium and heroin in the world after Afghanistan during the last decade, the country has recorded an encouraging decline of illicit opium cultivation since the mid-1990s.

Results of the 2003 UNODC Myanmar Annual Opium Survey

(1) Opium poppy cultivation

The total opium poppy cultivation in Myanmar in 2003 was estimated at 62,200 ha. Compared to the previous year, this represented a decrease of 24% in opium poppy cultivation at the national level.

(2) Opium production

At the country level, the potential opium production was estimated at 810 metric tons. This represented a decrease of 4 % compared to last year. This year favourable weather conditions for opium poppy cultivation accounted for the higher potential yield of about 13 kg/ha.

(3) Opium Prices and Cash Income

Combining the opium production estimates and the anticipated 2003 opium prices at the time of the survey (130 US\$/kg), the total farm gate value of opium in Myanmar in 2003 ranged from US\$70 to US\$ 140 million, with a mean value of US\$105 million.

(4) Addiction

The data collected in 2003 showed that 0.65% of the population surveyed, age 15 and above, was smoking opium on a daily basis. The data also indicated that opium addiction is still far more widespread than heroin and ATS addiction in the Shan State. Less than 2% of village headmen reported cases of heroin addiction in their villages and less than 1% reported cases of ATS addiction.

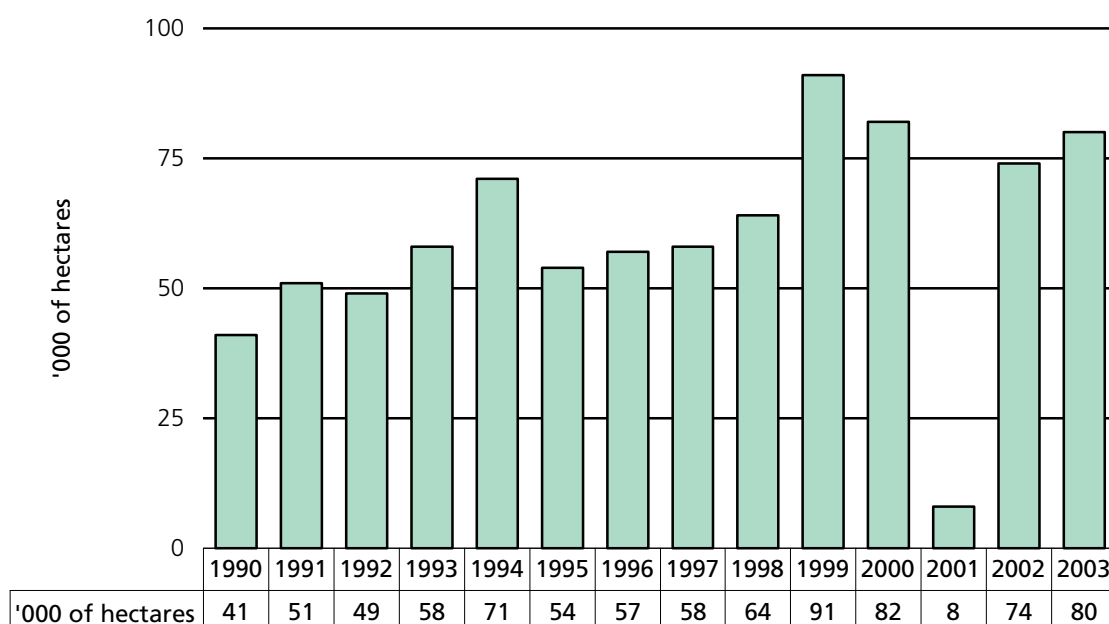
(5) Eradication

The Government of the Union of Myanmar reported eradicating 638 ha of opium poppy fields in 2003. The opium survey was not designed to monitor or validate the results of opium poppy eradication campaign. The methodology employed ensured that the results were post-eradication and reflected the net amount of opium poppy which was harvestable.

Fact Sheet : Myanmar 2003

Source: UNODC survey report, available at www.unodc.org/unodc/en/crop_monitoring

Opium poppy cultivation:	62,200 ha against 81,400 ha in 2002 (24% decrease)
2002-2003 trends in some areas:	Northern Shan State: - 45% Eastern Shan State: - 26% South Shan State: - 19% Wa Special Region 2: + 21% <i>(of which Wa Alternative Dvpt project:-19%)</i>
Potential opium yield:	13 kg/ha against 10 kg/ha in 2002
Potential opium production:	810 metric tons against 828 metric tons in 2002 (2% decrease)
Number of households cultivating opium:	350,000 households
Approximate fresh opium price at harvest:	US\$130/kg
Total farm gate value of opium:	US\$105 million
Average household cash income from opium:	between US\$160 and US\$190
Average opium income per capita:	US\$594 (2002 GDP per capita: US\$184)
Opium smoking prevalence rate in the population interviewed:	0.6% of the population aged 15 and above
Reported eradication	637 ha

*Graphs, tables, maps: Myanmar***Myanmar, opium poppy cultivation 1990 – 2003 (in thousand of ha)****Myanmar, opium poppy cultivation in 2002 and 2003**

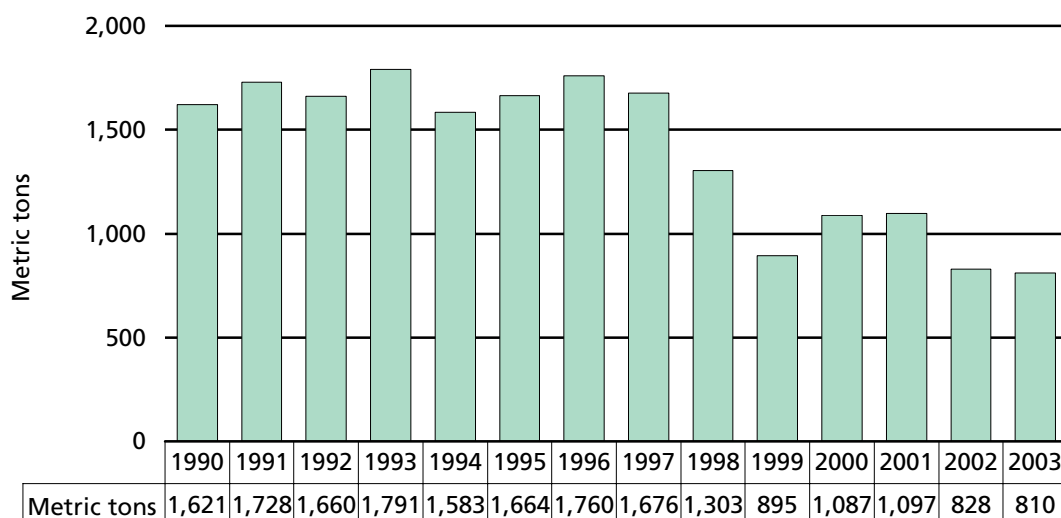
Regions	2002 (rounded ha)	2003 (rounded ha)	% of change 2002-2003
Northern Shan State	37,500	20,700	-45%
Eastern Shan State	7,800	5,800	-26%
Southern Shan State	11,600	9,400	-19%
Wa Special Region Number 2	17,600	21,300	21%
(of which Wa Alt Dvpt Project)	962	775	-19%
Shan State	74,600	57,200	-23%
Outside Shan State	6,800	5,000	-26%
National total	81,400	62,200	-24%

Myanmar, average regional yields (kg/ha)

Regions	Number of observations	Average opium yield (kg/ha)
Northern Shan State	0	11*
Wa Special Region 2	268	16
WADP (Mongyang Township)	230	11
Central Shan State	60	11
Southeastern Shan State	56	8
Southwestern Shan State	58	14
Shan State	672	13

* Average opium yield of neighbouring Central Shan State used as best estimate

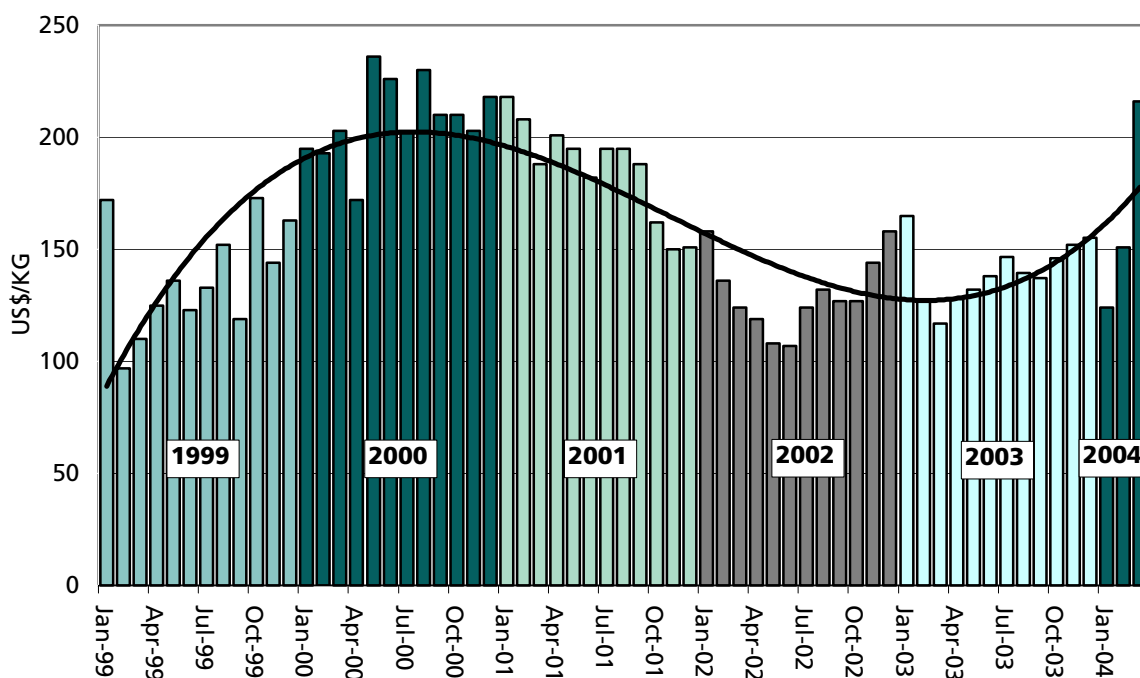
Myanmar opium production 1990 – 2003 (in metric tons)



Myanmar, opium farmgate prices in Mong Pawk market, US\$/kg (Wa Special Region 2)

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1999	172	97	110	125	136	123	133	152	119	173	144	163
2000	195	193	203	172	236	226	202	230	210	210	203	218
2001	218	208	188	201	195	182	182	195	195	188	162	150
2002	151	158	136	124	119	108	107	124	132	127	127	144
2003	158	165	127	117	128	132	138	147	139	137	146	152
2004	155	151	216									

Myanmar, opium farmgate prices in Mong Pawk market, US\$/kg (Wa Special Region 2)



Myanmar, Shan State, 2002 opium prices by sale periods

Period	Equivalent months range	Answers	Average weight of opium sold (kg)	Kyat/kg	USD/kg	Exchange rate (Kyat/US\$)
Before harvest	Before Jan. 02	160	0.64	102,000	135	753
During harvest	Jan-Mar 2002	729	0.88	108,000	143	753
Just after harvest	Apr-May 2002	1,478	1.29	106,000	107	855
Rainy Season	Jun-Sep 2002	353	0.96	104,000	106	985
Dry Season	Oct-Dec 2002	272	1.04	120,000	110	1,090
For 2002		2,992		107,00	115	931

*Average weighted by number of answers and average weight of opium sold for each period.

Myanmar, Shan State annual source of cash income for opium farmers in 2002

Source of Cash Income	Annual cash income (in Kyat)	% of total income	Number of answers	Annual income (US\$)
Opium	148,000	69%	2,010	159
Cattle	22,000	10%	669	23
Other	13,000	6%	341	15
Upland	11,000	5%	388	12
Paddy	7,000	3%	247	8
Labour	7,000	3%	388	8
Vegetable	3,000	1%	265	3
Maize	3,000	1%	162	3
Total	216,000			232

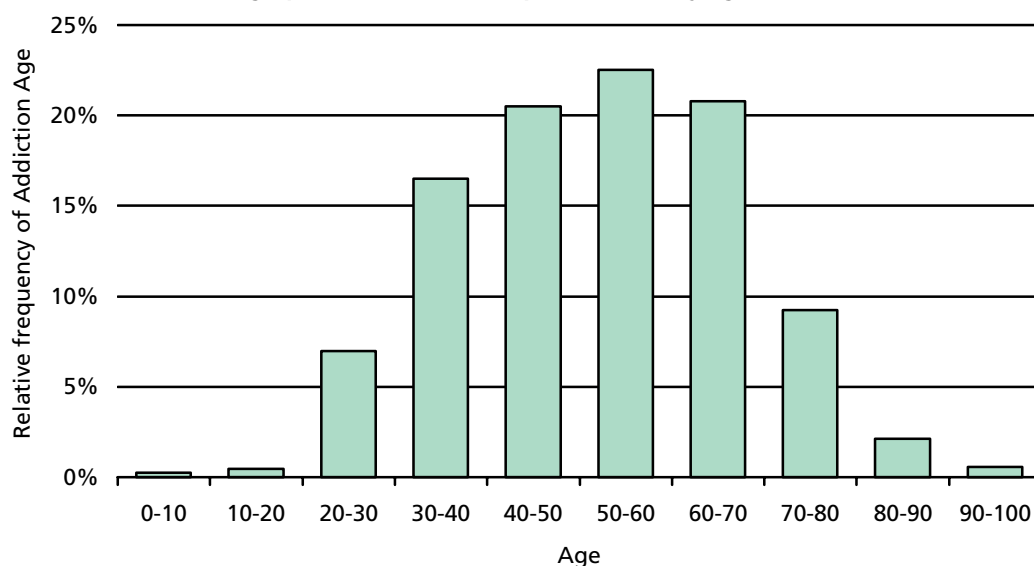
Sample size: 2,426 interviews of opium farmers

Myanmar, Shan State opium addiction in the Shan State by regions in 2003

Regions	Number of villages sampled	Total population above 15 years old	Number of addicts	% of opium addicts in population age 15 and above
Northern Shan	373	73,041	263	0.4%
Wa Special Region 2	269	50,863	385	0.8%
Southwestern Shan	248	35,257	216	0.6%
Central Shan	361	53,753	94	0.2%
Southeastern Shan	310	33,124	593	1.8%
Shan State	1,561	246,038	1,551	0.6%

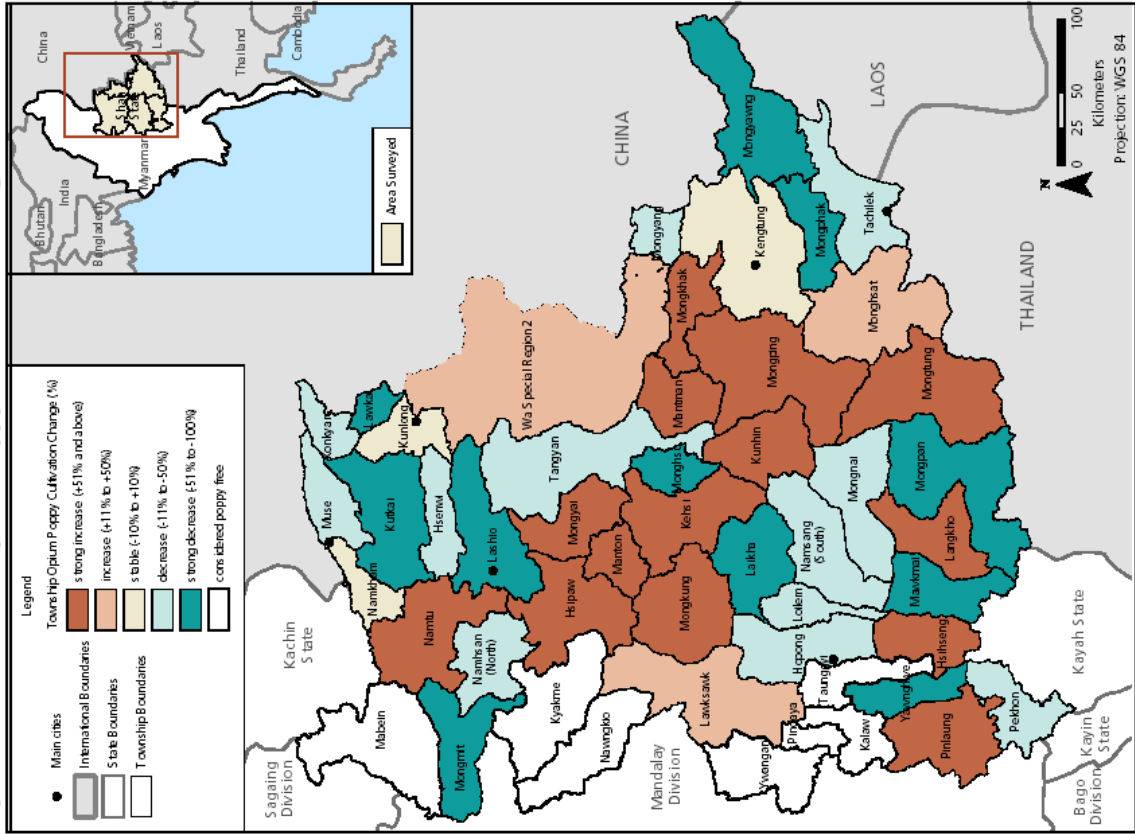
Myanmar, Shan State, demographic distribution of opium addicts by gender and age in 2003

Age class	Man	Woman	Total	% of Total
<10	2	2	4	0.3%
10-20	4	3	7	0.5%
20-30	93	15	108	7.0%
30-40	231	24	255	16.5%
40-50	293	24	317	20.5%
50-60	325	23	348	22.5%
60-70	291	30	321	20.8%
70-80	129	14	143	9.3%
80-90	26	7	33	2.2%
90-100	7	2	9	0.6%
Total	1,401	144	1,545	

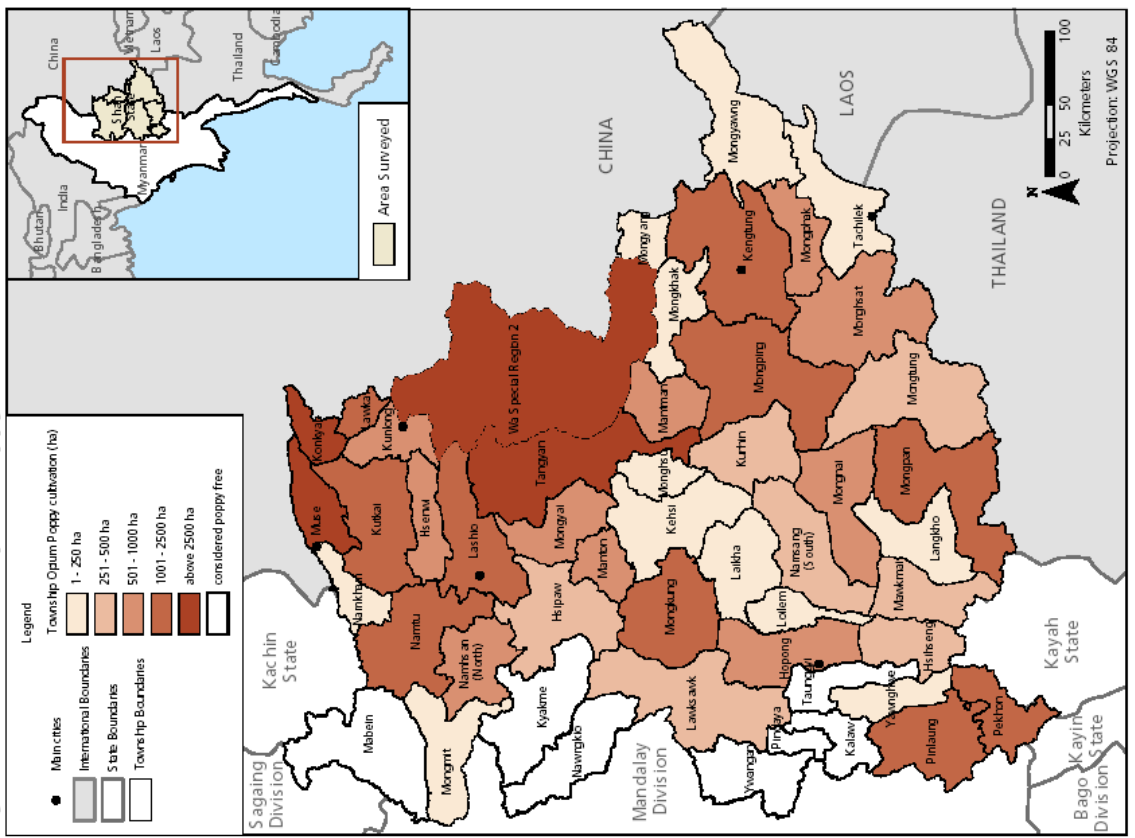
Myanmar, Shan State, demographic distribution of opium addicts by age in 2003**Myanmar, reported eradication by region and state in 2003**

State	Eradication (ha)
Northern Shan State	235
Southern Shan State	182
Eastern Shan State	91
WADP	55
Kachin State	56
Chin State	2
Kayah State	9
Mandalay Division	8
Total	638

Myanmar Shan State Opium Poppy Cultivation change 2002 - 2003



Myanmar Shan State Opium Poppy Cultivation 2003



3.1.3. Lao PDR

Although far behind Afghanistan and Myanmar, the remote and mountainous areas of Northern Laos have consistently come in third place as a source of the world's illicit opium and heroin during the last ten years. Since 1998, however, opium poppy cultivation has recorded a steady decline in that country.

Results of the 2003 UNODC Lao PDR Annual Opium Survey

(1) Opium poppy cultivation

The survey estimated that there were 12,000 hectares of opium poppy under cultivation in 2003. It was the lowest national estimate since 1989 and represented a reduction of 2,100 hectares (or 15%) compared with the 2001-2002 season (14,100 ha). It confirmed the downward trend of opium poppy cultivation in Laos since 1998 when the cultivation of opium poppy reached 26,800 hectares.

(2) Opium production

In 2003, the average potential opium yield was estimated to range between 6 and 14 kg/ha, with a mean value of 10 kg/ha. In 2002, the potential yield was estimated at 8 kg/ha. This potential yield may differ from the actual harvest, and does not include possible post-harvest losses.

Based on the estimated 12,000 ha of opium poppy cultivation and an average yield of 6 to 14 kg/ha, the potential production of opium in Laos would range between 72 and 168 metric tons, with a mean value of 120 metric tons. In terms of potential opium production, this represented an increase of 7% compared to last year.

(3) Number of farmers involved in opium poppy cultivation

Based on an average of 0.29 ha of opium poppy cultivation by household (results of the sample ground survey), there would be between 35,000 and 45,000 households cultivating opium poppy in Laos in 2003 (mean of 40,000).

(4) Voluntary eradication

For the first time this year, the Lao Government launched a large-scale campaign of voluntary or agreed eradication. The opium survey was not designed to monitor or validate the results of this campaign. However, the Lao Commission on Drug Control and Abuse (LCDC) reported the eradication of 4,134 ha. The opium survey was not designed to monitor or validate the results of opium poppy eradication campaign. The methodology employed ensured that the results were post-eradication and reflected the net amount of opium poppy which was harvestable.

Prior to the opium planting time, the provincial and district drug control committees made agreements with a number of opium farmers to stop growing opium poppy in 2003. The validity of the agreement was checked during the opium growing season. When opium poppy cultivation was found within the village boundaries and considered a breach of the agreement, the farmers were asked by the authorities to eradicate their opium poppy fields (voluntary eradication), or the farmers to give permission for the opium fields to be eradicated (agreed eradication).

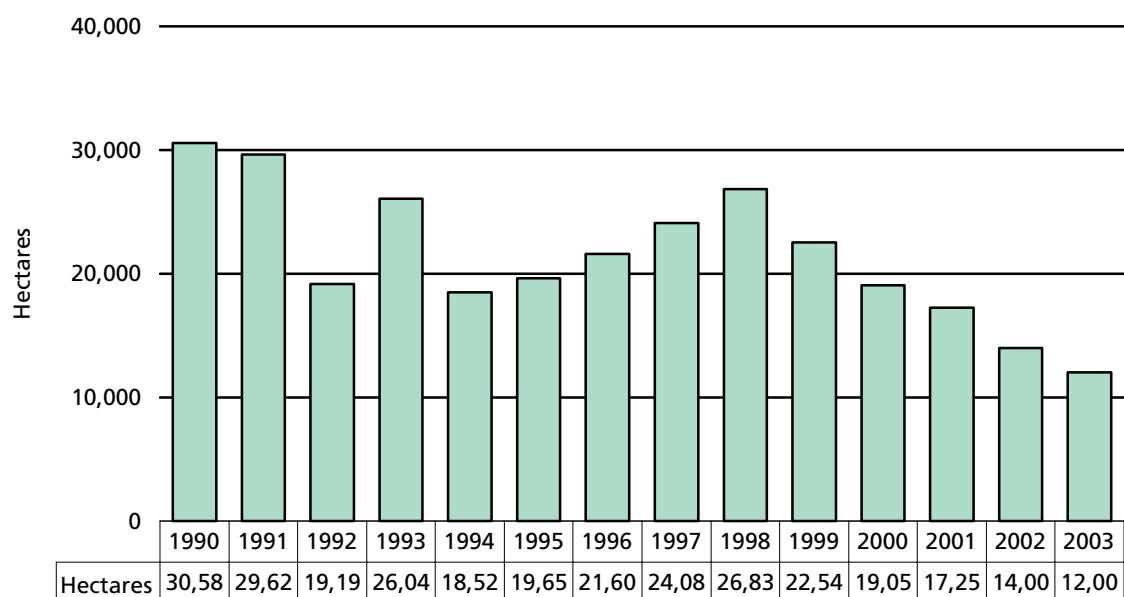
The eradication teams were made of students and staff from the district mass organisations like the Youth Union, the Women Union or other district departments. The military and the police were not involved in these operations.

If the farmers refused the eradication, the assistance of the village headman was requested to convince the farmers to respect the agreement and not to plant opium poppy in the future. The data on eradication, as reported by the Lao Government, is presented in annex.

Fact Sheet : Lao PDR 2003

Source: UNODC survey report, available at www.unodc.org/unodc/en/crop_monitoring

Opium poppy cultivation:	12,000 ha against 14,100 ha in 2002 (15% decrease)
Potential opium yield:	10 kg/ha against 8 kg/ha in 2002
Potential opium production:	120 metric tons against 112 metric tons in 2002 (7% increase)
Number of households cultivating opium:	40,000 households
Most recent opium prices available (average for 2002):	US\$160
Average household cash income from opium In 2002:	US\$92
Number of addicts reported by the authorities:	30,000 persons (5,600 women or 18%, and 9,700 over 60 years old or 32%)
Average annual domestic consumption of opium :	between 1.3 and 1.5 kg/year
Estimated annual domestic consumption of opium:	42 metric tons
Reported eradication	4,134 ha.

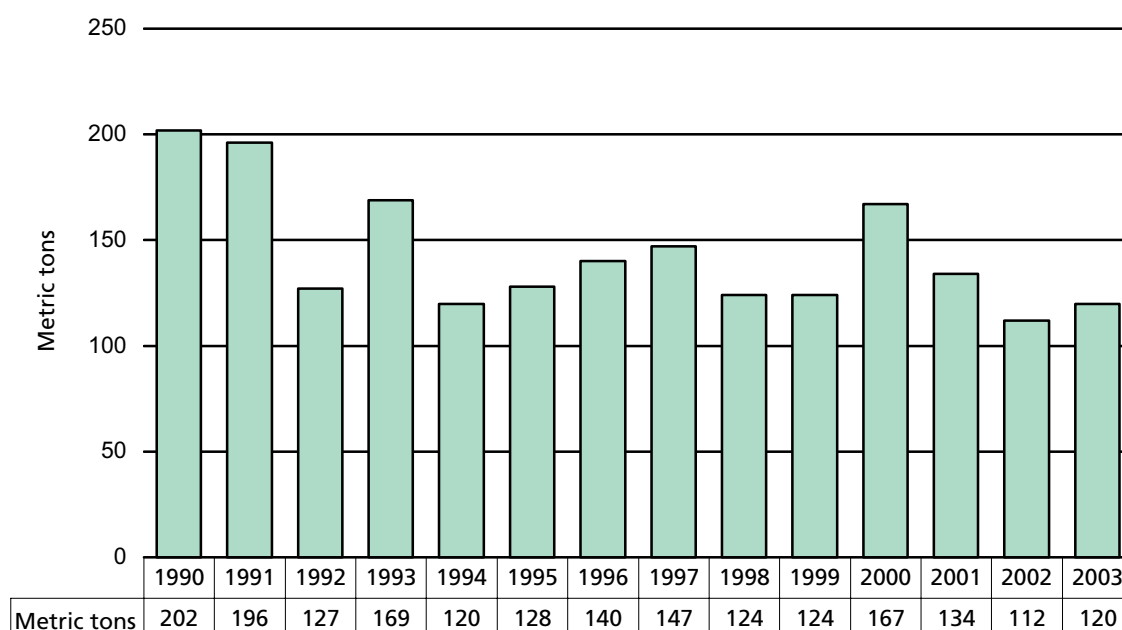
*Graphs, tables, maps: Lao PDR***Lao PDR, opium poppy cultivation 1990-2003 (in ha)****Lao PDR, evolution of the area under opium poppy cultivation by province, 1992-2003**

	1992	1996	1998	2000	2001	2002	2003
Luang Prabang	3,510	3,550	2,786	3,036	2,950	3,400	2,576
Huapanh	3,770	3,817	3,450	3,921	2,903	2,934	2,530
Phongsaly	2,840	3,558	5,778	3,872	3,278	1,703	1,602
UdomXay	1,860	2,416	5,597	4,061	3,112	1,901	1,579
Luang Namtha	1,730	2,197	3,593	1,514	1,687	1,355	1,197
Xieng Khuang	2,880	2,916	2,902	1,376	1,426	1,078	979
Bokeo	620	785	428	448	427	332	480
Xayabouri	400	754	1,014	508	729	857	472
Xaisombun	N/a	n/a	n/a	224	521**	240	354
Vientiane	880*	900*	672*	19	117**	210	130
Bolikhamsay	700	708	617	73	105	42	74
Total	19,190	21,601	26,837	19,052	17,255	14,052	11,973
Rounded Total	19,200	21,600	26,800	19,100	17,300	14,100	12,000

*Includes Xaisombun

**Previously within Xaisombun, the districts of Hom and Longxan are part of Vientiane Province since 2001.

Lao PDR, potential opium production since 1992 (in metric tons)



Lao PRD, 2002 opium prices by sale periods

Period	Equivalent months range	Answers	Average weight of opium sold (kg)	KIP/kg	US\$/kg
During harvest	Jan-Mar 2002	46	0.64	1,781,855	186
Just after harvest	Apr-May 2002	310	0.98	1,568,448	163
Rainy Season	Jun-Sep 2002	97	1.50	1,660,996	160
Dry Season	Oct-Dec 2002	85	1.22	1,583,858	146
For 2002		538		1,600,000*	160

*Average weighted by number of answers and average weight of opium sold for each period.

Lao PDR, 2002 annual source of cash income for opium farmers

Source of Cash Income	Annual cash income (Kip)	% of total income	Number of answers	Annual income (US\$)
Paddy	36,130	1.7%	37	4
Upland	121,721	5.8%	180	12
Animal	716,480	34.2%	633	70
Vegetable	74,614	3.6%	374	7
Opium	889,885	42.4%	535	88
Labor	75,300	3.6%	209	7
Trade	22,111	1.1%	39	2
Wood	101,284	4.8%	292	10
Non Timber Forest Products	32,546	1.6%	99	3
Other	26,477	1.3%	75	3
Total	2,096,548	100%		206

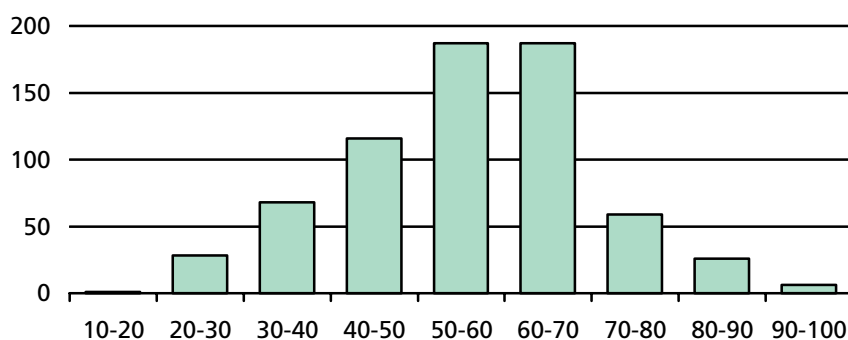
Sample size: 1,142 interviews of opium farmers

Lao PDR, Number of opium addicts 2000-2003

Year	Addicts
2000	63,000
2001	58,000
2002	53,000
2003	30,000

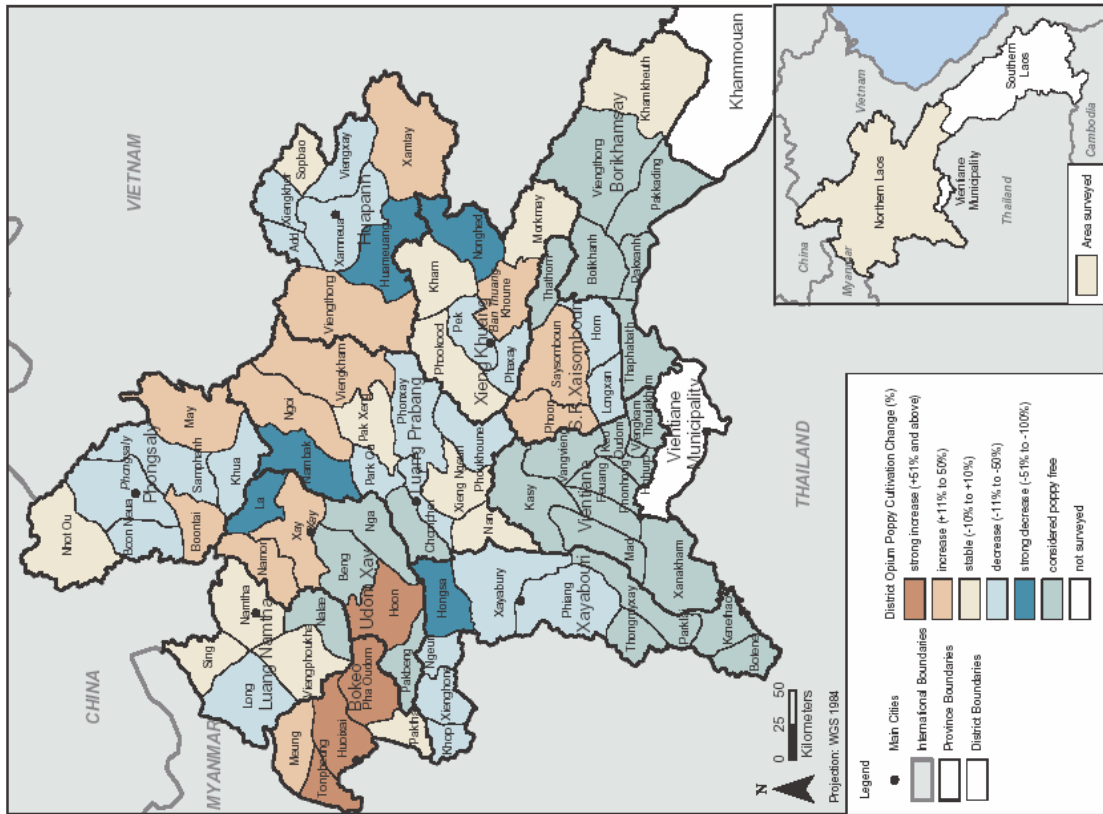
Lao PDR, Demographic Distribution of Opium Addicts by Gender and Age in 2003

Age	2003				2002	2001
	Male	Female	Total	% of Total	% of Total	% of Total
10-20	1	0	1	0.1%	1.14%	1.20%
20-30	22	6	28	4.1%	9.23%	10.85%
30-40	56	12	68	10.0%	22.13%	21.90%
40-50	93	23	116	17.1%	22.85%	23.27%
50-60	146	41	187	27.6%	21.46%	22.53%
60-70	149	38	187	27.6%	16.71%	14.52%
70-80	44	15	59	8.7%	5.17%	4.57%
80-90	13	13	26	3.9%	1.05%	0.90%
90-100	4	2	6	0.9%	0.22%	0.27%
Total	528	150	678			
%	78%	22%	100%	100%	100%	100%

Laos PDR, demographic distribution of opium addiction by age in 2003**Lao PDR, reported voluntary eradication in 2003**

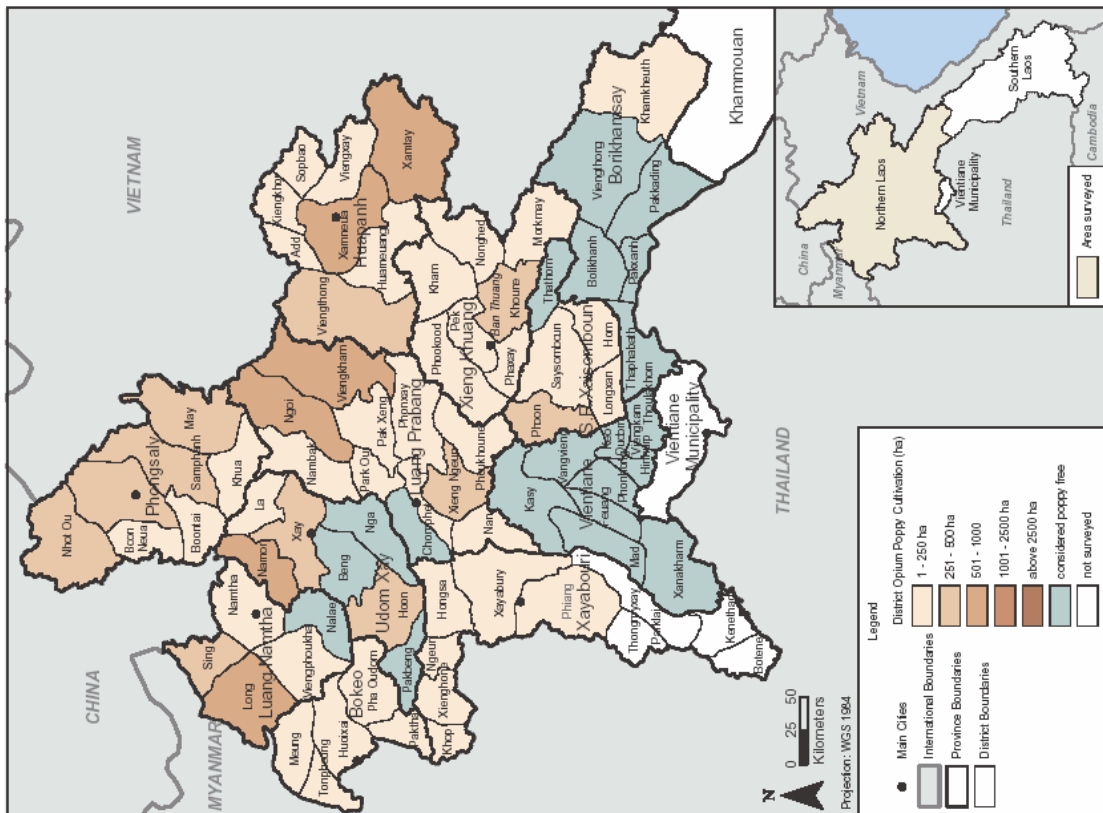
Province	Hectares
Phongsaly	416
Luang Namtha	1,005
UdomXay	428
Bokeo	58
Luang Prabang	1,315
Huapanh	549
Xayabouri	305
Xieng Khuang	18
Bolikhamsay	40
Total	4,133

Northern Laos Opium Poppy Cultivation change 2002 - 2003



Source: LCDC – UNODC Laos Opium Poppy Cultivation 2003

Northern Laos Opium Poppy Cultivation 2003



Source: LCDC – UNODC Laos Opium Poppy Cultivation 2003

3.1.4. Seizure of Illicit Laboratories

**MANUFACTURE
SEIZURES OF ILLICIT LABORATORIES
REPORTED FOR 2001 - 2002**

Remark: For convenience, an attempt was made to group the reported estimates by drug categories. however, due to inconsistencies and gaps in the reporting, no overall analysis of the data set was performed. Numbers are presented as reported to UNODC and should be interpreted with caution.

Source: Annual Report Questionnaire if not otherwise indicated

Country or Territory	Year	Name of drug seized	Number of laboratories (and quantity of drug)	Source
OPIATE GROUP				
Americas				
<u>North America</u>				
Mexico	2001	Heroin	1 Lab.	
	2002	Heroin	1 Lab.	
Subtotal North America			2 Lab.	
<u>South America</u>				
Colombia	2001	Heroin	6 Lab.(1.400 kg)	
	2002	Heroin	3 Lab.	
Subtotal South America			9 Lab.(1.400 kg)	
Total Americas			11 Lab.(1.400 kg)	
Asia				
<u>East and South-East Asia</u>				
<i>Hong Kong SAR, China</i>	2001	Heroin	12 Lab.	
	2002	Heroin	6 Lab.	
Myanmar	2001	Heroin	16 Lab.	
	2002	Heroin	9 Lab.	
Subtotal East and South-East Asia			43 Lab.	
<u>South Asia</u>				
India	2001	Morphine	1 Lab.	
	2001	Heroin	6 Lab.	
	2002	Heroin	7 Lab.(28.000 kg)	
	2002	Morphine	1 Lab.(5.000 kg)	
Subtotal South Asia			15 Lab.(33.000 kg)	
Total Asia			58 Lab.(33.000 kg)	
Europe				
<u>Eastern Europe</u>				
Poland	2001	Polish heroin	408 Lab.(280.000 lt.)	
	2002	Polish heroin	14 Lab.	
Republic of Moldova	2001	Opium	11 Lab.	
Russian Federation	2001	Opium	232 Lab.(24.114 kg)	
	2002	Opium	91 Lab.	
Ukraine	2001	Poppy	30 Lab.	
Subtotal Eastern Europe			786 Lab.(24.114 kg)(280.000 lt.)	
Turkey	2002	Heroin	10 Lab.	
Total Europe			796 Lab.(24.114 kg)(280.000 lt.)	
Opiate group			865 Lab.(58.514 kg)(280.000 lt.)	