

3.1.1. Afghanistan

During the 1990s, Afghanistan firmly established itself as the largest source of illicit opium and its derivative, heroin, in the world. In 2005, opium poppy cultivation decreased for the first time after three consecutive years of increases.

While area under opium poppy cultivation decreases...

The area under opium poppy cultivation in Afghanistan decreased by 21 per cent from about 131,000 hectares in 2004 to 104,000 ha in 2005. Opium poppy cultivation decreased in 19 provinces, while an increase was noted in ten provinces. Seven provinces, mainly situated close to Kabul, had only negligible amounts of opium poppy fields. As a new development, 35 per cent of farmers reported that they decreased opium poppy cultivation due to fear of eradication. The main opium poppy cultivation provinces in 2005 were Hilmand, Kandahar, Balkh, Farah and Badakshan. Together, these five provinces represented 65 per cent of the total area under opium poppy cultivation.

...favourable climatic conditions result in only a slight decrease compared to 2004

Potential opium production was estimated at around 4,100 mt, representing a 2.4 per cent decrease compared to 2004. The apparent discrepancy between the large decrease in cultivation and the relatively small decrease in production was due to the prevailing climatic condition during the growing season, which were favourable for opium poppy. Consequently, the opium yield in 2005 was estimated at 39 kg/ha, a 22 per cent increase compared to the 2004 yield figure of only 32 kg/ha.

Prices for dry opium remain stable...

The prices for dry opium remained essentially stable with a weighted average of US\$ 138 in 2005. Regional price differences are pronounced: while low prices in northern Afghanistan (US\$ 112) reflect strong production increases, the highest prices (US\$ 235) can be found in central Afghanistan where production practically ceased in 2005.

...but household income of the estimated 2 million growers of opium poppy decreases...

The number of families involved in opium poppy cultivation decreased by 13 per cent to 309,000 in 2005. Thus, about 2 million persons or 8.7 per cent of the total population or 11 per cent of the rural population in Afghanistan are involved in cultivating opium poppy. Due to the higher yields, the yearly gross income per opium growing family increased by 6 per cent to US\$ 1,800 in 2005. The gross income from opium poppy cultivation per hectare increased to US\$ 5,400. This is almost 10 times higher than the gross income a farmer could expect from one hectare of wheat.

Lower production and lower prices result in lower farm gate value...

Based on opium production and reported opium prices, the farm-gate value of the 2005 opium harvest amounted to US\$ 560 million. Slightly lower production (-2.4 per cent) and lower prices (-3 per cent) contributed to this 6 per cent reduction compared to 2004. In 2005, the farm-gate value of opium production was equivalent to 11 per cent of the country's GDP, down from 13 per cent a year earlier.

About 5 percent of opium poppy cultivation are eradicated

Afghanistan's first comprehensive eradication programme was initiated during the 2004-2005 growing season. UNODC verified the eradication of some 4,000 ha of opium poppy by provincial governors. In addition, the government reported the eradication of 1,100 ha through other agencies. Thus, total eradication amounted to some 5,100 ha, equivalent to roughly 5 per cent of opium poppy cultivation in 2005.

Fact sheet - Afghanistan opium survey 2005

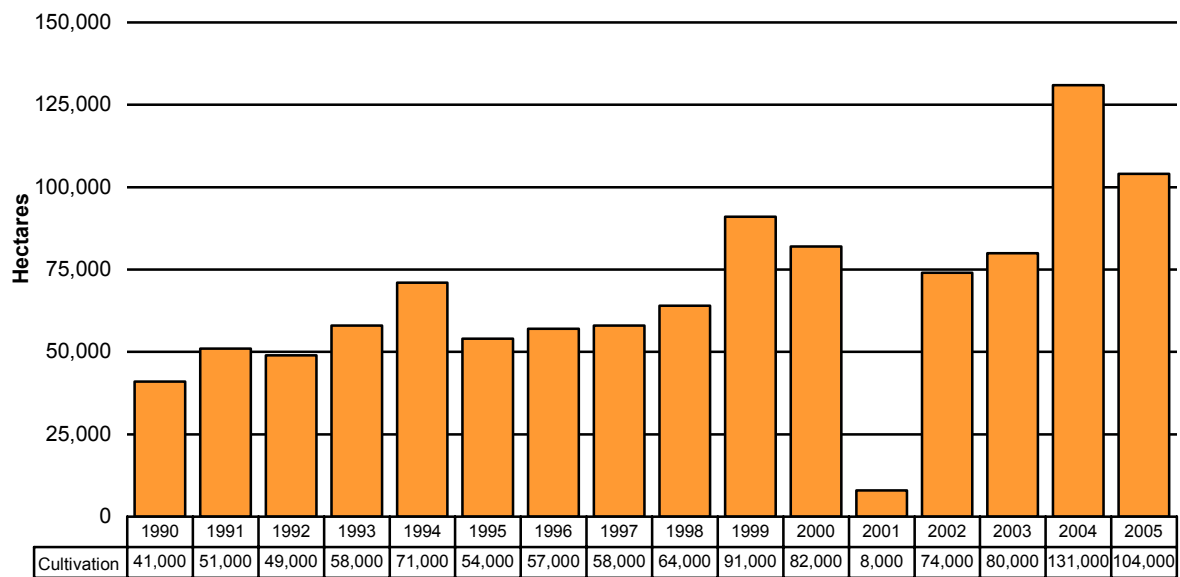
	2004	Variation on 2004	2005
Net opium poppy cultivation	131,000 ha	- 21%	104,000 ha
in percent of actual agricultural land	2.9%		2.3%
number of provinces affected ¹	32 (all)		25
Average opium yield	32 kg/ha	22%	39 kg/ha
Production of opium	4200 mt	-2.4%	4,100 mt
in percent of world illicit opium production	87%		88% ²
Number of households involved in opium cultivation	356,000	- 13%	309,000
Number of persons involved in opium cultivation	2.3 million		2.0 million
in percent of total population (23 million)	10%		8.7%
Average farm-gate price of dry opium at harvest time	US\$ 142	- 3%	US\$ 138/kg
Afghanistan GDP ³	US \$ 4.7 billion	+10.4%	US \$ 5.2 billion
Total export value of opium to neighbouring countries	US\$ 2.8 billion	- 3.6%	US\$ 2.7 billion
in percent of GDP	61%		52%
gross trafficking profits of Afghan traffickers	US\$ 2.2 billion	- 2.7%	US\$ 2.14 billion
total farm-gate value of opium production:	US\$ 600 million	- 6.6%	US\$ 560 million
Household average yearly gross income from opium of opium growing families	US\$ 1,700	+ 6%	US\$ 1,800
Per capita gross income from opium of opium growing families	US\$ 260		US\$ 280
Afghanistan's GDP per capita	US\$ 206		US\$ 226
Indicative gross income from opium per ha	US\$ 4,600	+17%	US\$ 5,400
Indicative gross income from wheat per ha	US\$ 390	+41%	US\$ 550

¹ In 2005, the Afghan Government reorganized the country's administrative division into 34 provinces. However, the 2005 opium survey was designed, and its results are presented, according to the previous administrative division into 32 provinces.

² Preliminary estimate

³ Source: Afghan Government, Central Statistics Office: GDP figures for the year (2003/2004): Afs 223,629 millions and for the year (2004/2005): Afs : 254,487 millions.

Afghanistan, Opium Poppy Cultivation (thousands of ha), 1990 to 2005



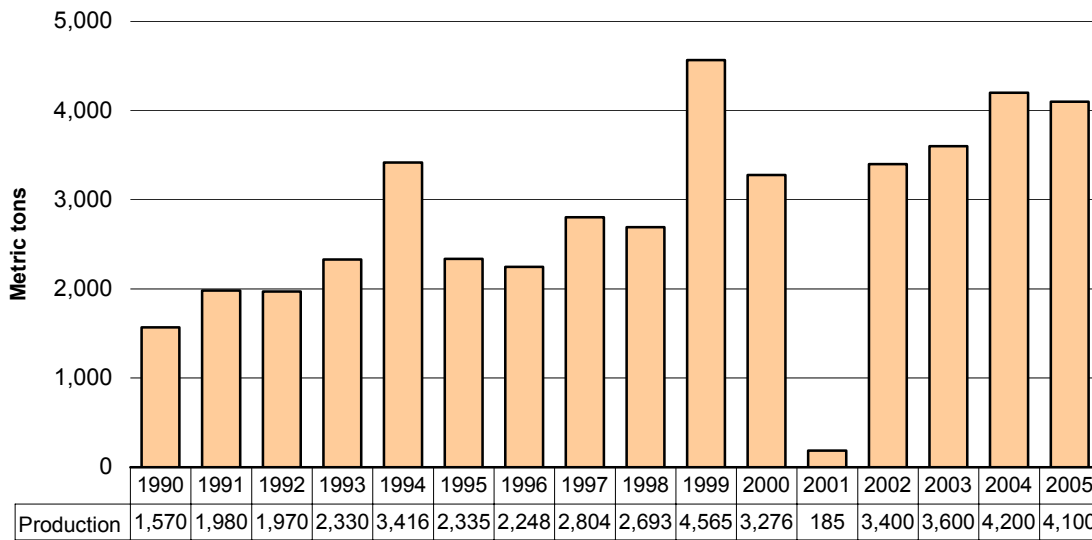
Afghanistan, largest opium poppy cultivating provinces (ha), 2005

Provinces	2004	2005	% one year change	% of total in 2005	Cumulative % in 2005
Hilmand	29,353	26,500	-10%	25%	25%
Kandahar	4,959	12,989	162%	12%	38%
Balkh	2,495	10,837	334%	10%	48%
Farah	2,288	10,240	348%	10%	58%
Badakshan	15,607	7,370	-53%	7%	65%
Nangarhar	28,213	1,093	-96%	1%	66%
Rest of the country	76,298	36,064	-53%	34%	100%
Total (rounded)	131,000	105,100	-20%	100%	

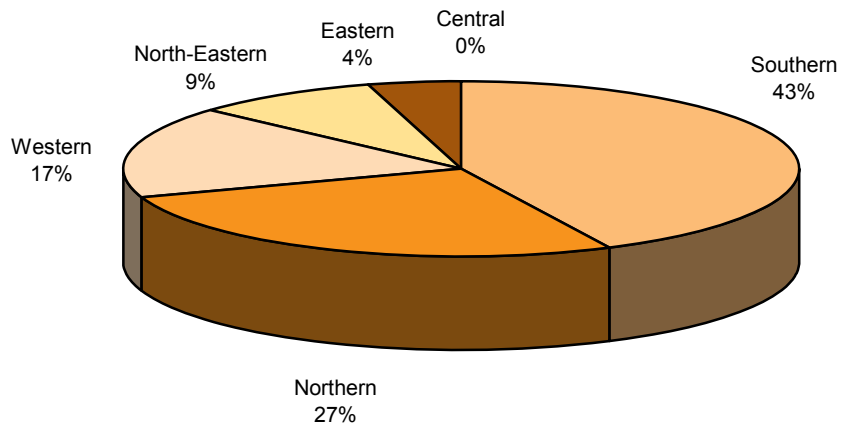
Afghanistan, potential opium production by region and at the national level, 2005

Region	Production in 2004 (mt)	Production in 2005 (mt)	Change (mt)	Change (%)	Share of total production in 2005
Southern	1,346	1,749	403	30%	43%
Northern	532	1,098	566	106%	27%
Western	346	685	339	98%	17%
North-Eastern	724	365	-359	-50%	9%
Eastern	1,190	180	-1,010	-85%	4%
Central	82	4	-78	-95%	0%
Total (rounded)	4200	4100	-100	-2%	100%

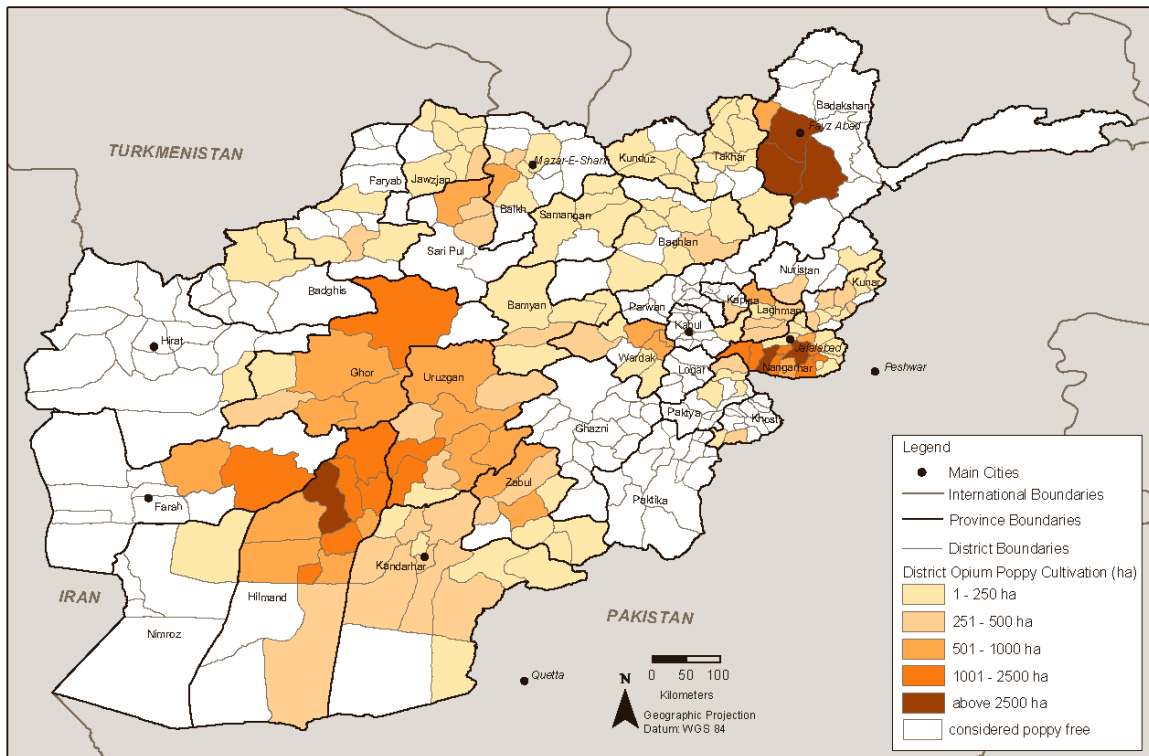
Afghanistan, Opium production, 1990 to 2005



Afghanistan, opium production by region in 2005

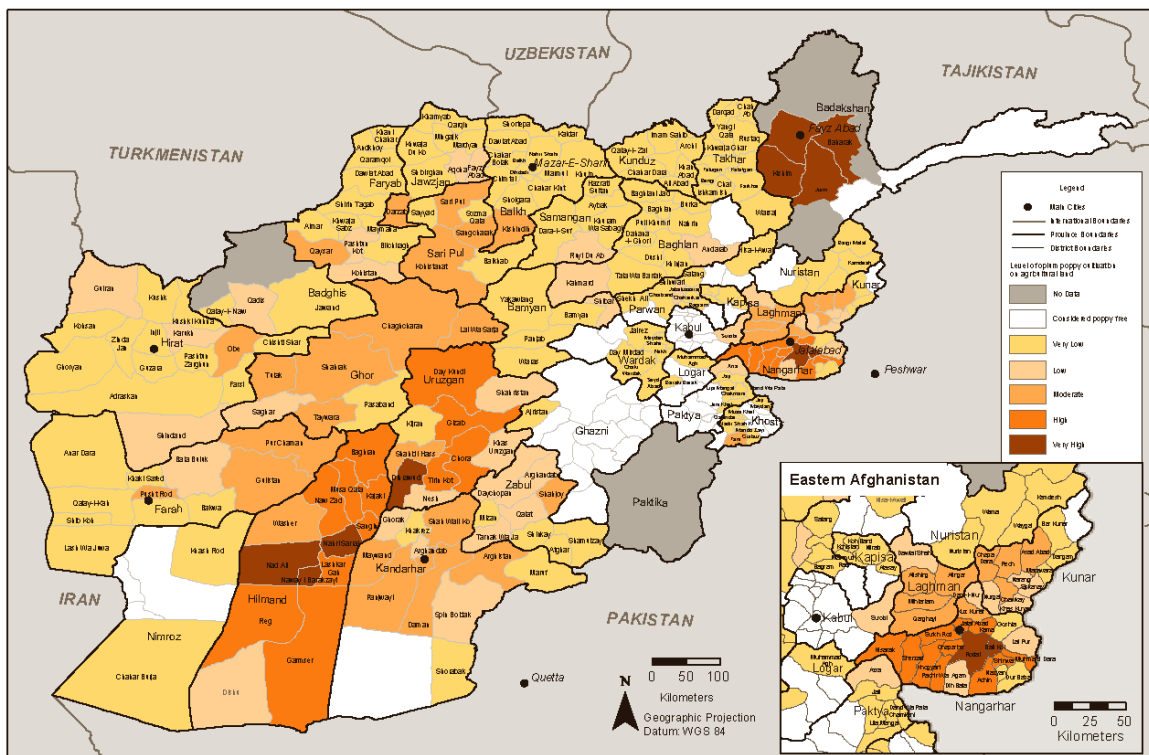


Afghanistan, opium poppy cultivation 2003



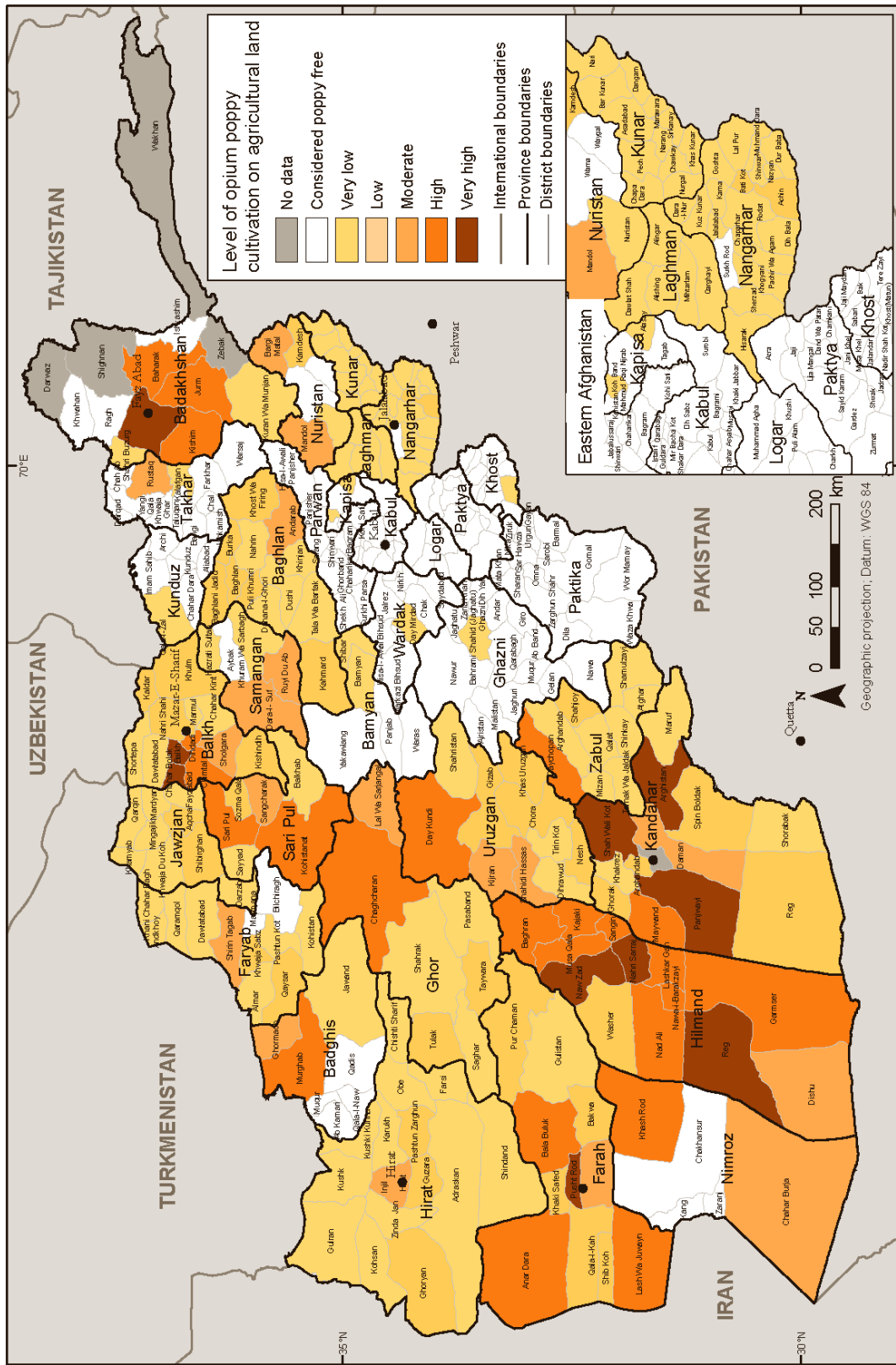
Source: CND - UNODC Afghanistan Opium Survey 2003

Afghanistan, opium poppy cultivation 2004



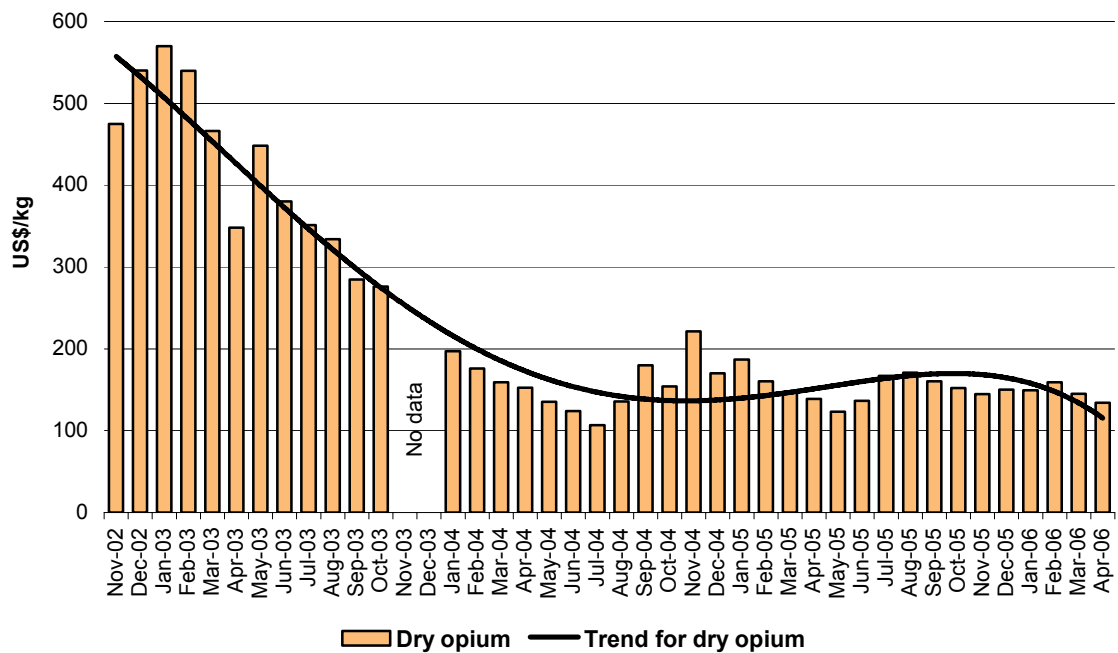
Source: CND - UNODC Afghanistan Opium Survey 2004

Opium poppy cultivation in Afghanistan, 2005 (at district level)



Source: ICN - UNODC Afghanistan Opium Survey, 2005
 Note: The boundaries and names shown on this map do not imply official endorsement or acceptance by the United Nations.

Afghanistan, farm gate prices for dry opium (US\$/kg), 1992-2006



Afghanistan, opium farm gate prices (\$US/kg), 2005

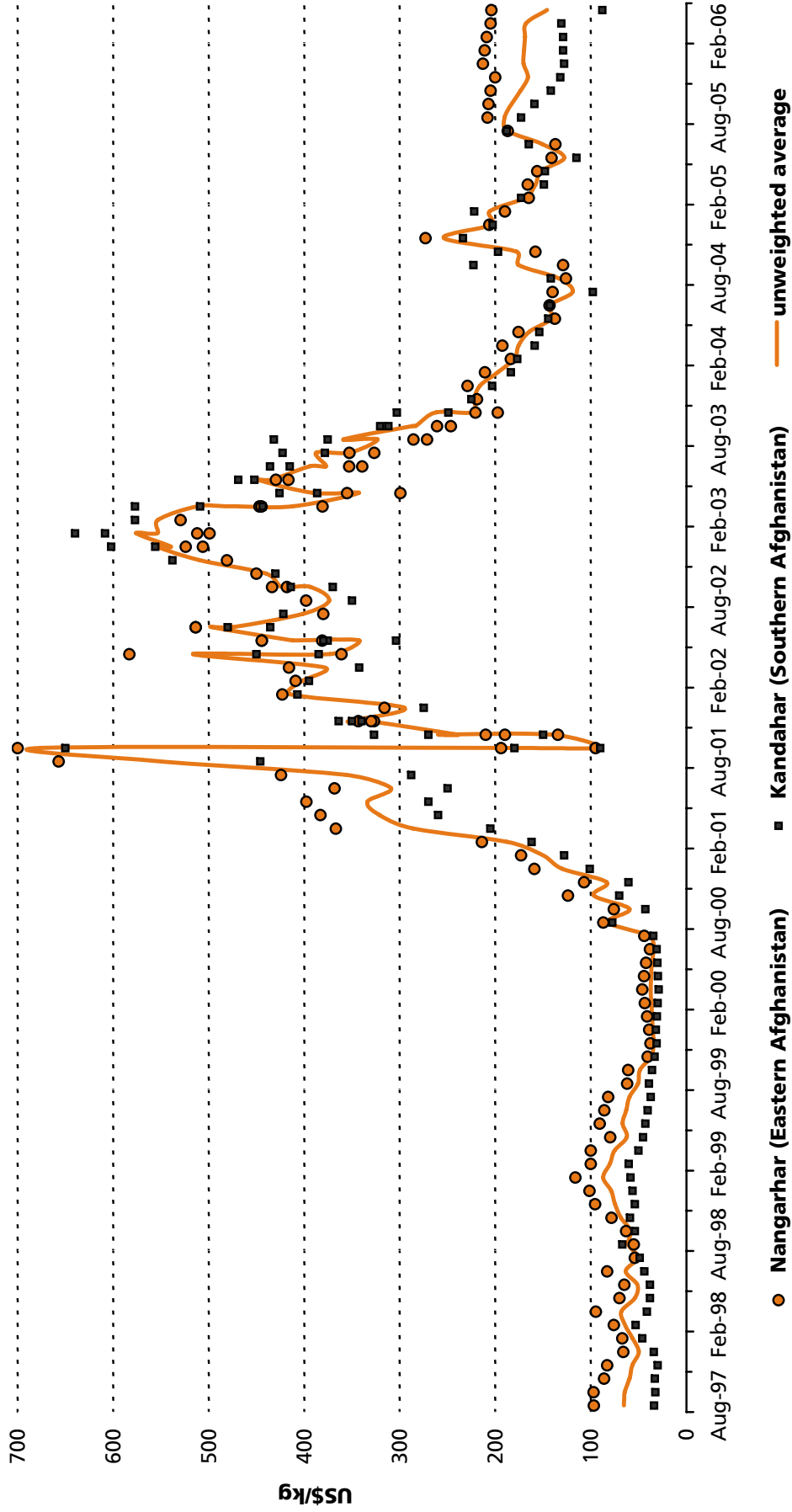
Period	Dry opium
Jan-05	187
Feb-05	161
Mar-05	147
Apr-05	139
May-05	123
Jun-05	137
Jul-05	167
Aug-05	171
Sep-05	161
Oct-05	152
Nov-05	145
Dec-05	150
Jan-06	149
Feb-06	159
Mar-06	145
Apr-06	134

n = number of observations

Prices of dry opium collected from traders in Nangarhar and Kandahar in US\$ per kg.

2000				2003			
Date	Nangarhar	Kandahar	Simple average	Date	Nangarhar	Kandahar	Simple average
Jan-00	41	31	36	Mid Jan 03	512	640	576
Feb-00	43	30	37	End Jan 03	499	609	554
Mar-00	46	29	38	Mid Feb 03	529	577	553
Apr-00	44	30	37	End Feb 03	447	577	512
May-00	42	30	36	Mid Mar 03	445	509	477
Jun-00	38	31	35	End Mar 03	381	444	412
Jul-00	44	35	39	Mid Apr 03	299	386	343
Aug-00	87	78	82	End Apr 03	355	426	390
Sep-00	76	43	60	Mid May 03	430	469	449
Oct-00	124	70	97	End May 03	416	452	434
Nov-00	107	61	84	Mid Jun 03	353	436	394
Dec-00	159	101	130	End Jun 03	339	415	377
2001				2004			
Jan-01	173	128	150	Jan-04	211	184	197
Feb-01	214	162	188	Feb-04	184	177	180
Mar-01	367	205	286	Mar-04	193	159	176
Apr-01	383	260	322	Apr-04	176	154	165
May-01	398	270	334	May-04	138	145	141
Jun-01	368	250	309	Jun-04	143	143	143
Jul-01	424	288	356	Jul-04	140	98	119
Aug-01	657	446	551	Aug-04	126	142	134
10-Sep-01	700	650	675	Sep-04	129	223	176
15-Sep-01	194	180	187	Oct-04	158	197	178
24-Sep-01	95	90	93	Nov-04	273	234	254
10-Oct-01	134	150	142	Dec-04	206	203	204
15-Oct-01	190	327	259	2005			
28-Oct-01	210	270	240	Jan-05	190	222	206
01-Nov-01	327	340	334	Feb-05	165	173	169
05-Nov-01	330	350	340	Mar-05	166	149	158
19-Nov-01	343	364	354	Apr-05	156	148	152
15-Dec-01	316	275	296	May-05	141	115	128
2002				2006			
15-Jan-02	423	407	415	Jan-06	211	129	170
15-Feb-02	409	395	402	Feb-06	209	129	169
15-Mar-02	416	343	379	Mar-06	205	131	168
14-Apr-02	583	450	517	Apr-06	204	88	146
25-Apr-02	361	385	373				
07-May-02	381	304	343				
15-May-02	444	376	410				
20-May-02	444	380	412				
09-Jun-02	514	480	497				
15-Jun-02	514	436	475				
15-Jun-02	380	422	401				
15-Aug-02	398	350	374				
09-Sep-02	418	370	394				
23-Sep-02	434	414	424				
01-Oct-02	450	430	440				
End Nov 02	481	538	510				
Mid Dec 02	506	602	554				
End Dec 02	524	556	540				

Afghanistan, prices of dry opium in Nangarhar and Kandahar collected from traders, US\$/kg, March 1997 - April 2006



3.1.2. Myanmar

During the last decade, policies by both the central government and local authorities continued to promote a rapid reduction in opium cultivation. Despite these efforts, Myanmar continues to be the main opium producer in Southeast Asia and the second largest opium producer in the world. The country's share of the world opium poppy cultivation fell slightly from 23 per cent in 2004 to 21 per cent in 2005.

Estimated area under opium poppy cultivation area decreases by 26 per cent

In 2005, the total area under opium poppy cultivation was estimated at 32,800 ha, representing a decrease of 26 per cent against 2004. Ninety per cent of the total opium poppy cultivation in Myanmar took place in the Shan State.

Estimated opium production declines by 16 per cent

Higher yields effectively doubled opium production in South Shan State in 2005, although production continued to decrease in other areas. The weighted national average opium yield was therefore estimated at 9.5 kg/ha against 8 kg/ha in 2004. In 2005, the total estimated production of opium was around 312 mt, a 16 per cent decrease compared to the previous year.

Eradication

Official reports from the Myanmar Government indicate that 3,907 ha of opium poppy were eradicated in 2005, an increase of 39 per cent compared to 2004. In the Shan State, the level of eradication remained similar to 2004, while eradication activities increased by more than 900 per cent in Kachin State, reflecting intensified government efforts to control opium poppy cultivation in this state.

Farm gate prices increase by 22 per cent

The average farm gate price of opium at harvest time was estimated at US\$ 187/kg. This represents an increase of 22 per cent compared to 2004 (US\$ 153/kg).

Household income in Shan State

The average annual cash income of opium producing households in 2005 was estimated at US\$ 292. This is an increase of 36 per cent against the previous year. The average income of non-opium producing households, however, was 20 per cent higher (US\$ 364), thus confirming the link between poverty and opium production.

Farm gate value

The average farm gate value of the country's opium production of 312 mt was estimated to be US\$ 58 million, equivalent to 0.7 per cent of the country's GDP.

Addiction

In Myanmar, opium addiction remains closely linked to opium production. On average, opium addiction affected 0.57 per cent of the adult population in 2005, but 1.74 per cent of the population in opium-growing villages. This is significantly higher than in non-opium growing villages, where only 0.28 per cent of the adult population is addicted to opium.

Fact sheet: Myanmar Opium Survey 2005

	2004	VARIATION ON 2004	2005
Opium poppy cultivation in the Union of Myanmar ⁴	44,200 ha	-26%	32,800 ha
Opium poppy planted area in the Shan State	41,000 ha	-25%	30,800 ha
Weighted average opium yield	8 kg/ha	+19 %	9.5 kg / ha
Potential production of opium in the whole of the Union of Myanmar (including the Shan State)	370 mt	-16%	312 mt
Opium poppy eradication in the Union of Myanmar ⁵	2,820 ha	+39%	3,907 ha
Average farm gate price of opium ⁶	US\$ 153/kg	+22%	US\$ 187/kg
Total potential value of opium production	US\$ 57 million	+3%	US \$ 58 million (0.7% of GDP)
Estimated number of households involved in opium poppy cultivation in Myanmar	260,000	-26%	193,000
Number of persons involved in opium poppy cultivation in Myanmar ⁷	1.3 million	-26%	965,000
Estimated number of households involved in opium poppy cultivation in the Shan State	240,000	-24%	181,000
Household average yearly income in opium producing household (Shan State)	US\$ 214	+36%	US\$ 292
of which from opium sale	US\$ 133 (or 62%)	+14%	US\$ 152 (or 52%)
Per capita income in opium producing households (Shan State)	US\$ 43		US\$ 58
Household average yearly income in non-opium poppy producing household (Shan State)	US\$ 276	+32%	US\$ 364
Per capita income in non-opium producing households (Shan State)	US\$ 55		US\$ 73
Addiction prevalence rate in Shan State (Population aged 15 and above)	0.61%	-7%	0.57%
Estimated number of opium addicts in Shan State	20,600	-5%	19,600

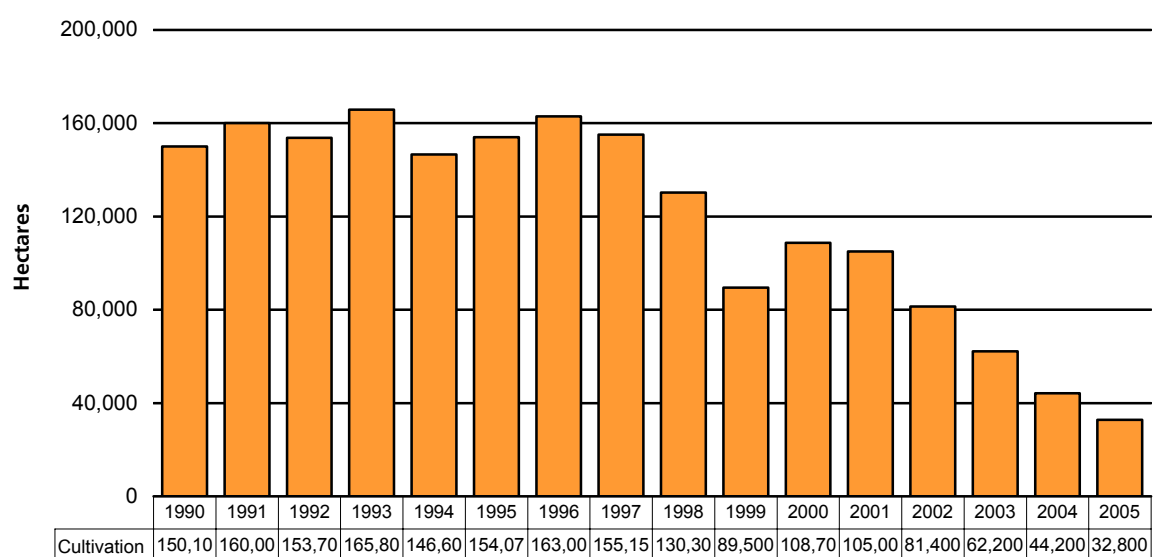
⁴ In 2005, no estimates were available for Kayah State and Sagaing Division, which had, respectively, 1,300 ha and 800 ha under opium poppy cultivation in 2004.

⁵ Official CCDAC statistics.

⁶ Last year's estimates for the average opium price in 2004, as well as the 2004 potential farm gate value, have been updated with data collected during the 2005 Myanmar Opium Survey.

⁷ In 2004, as well as in 2005, the average number of people per household was 5.

Myanmar, opium poppy cultivation (thousand of ha), 1990 – 2005



Myanmar, opium poppy cultivation, 2004 and 2005

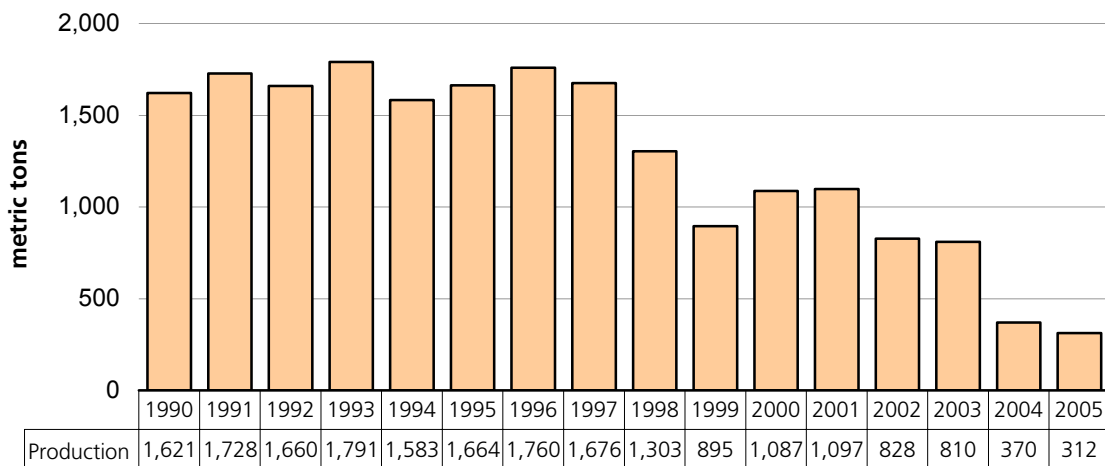
Administrative Region	2004 Planted Surface Estimate (ha)	2005 Planted Surface Estimate (ha)	Variation (%)
North Shan	6,000	2,570	-57%
South Shan	10,500	11,280	7%
East Shan	7,750	3,960	-49%
Special Region No. 2 (Wa)	16,750	12,960	-23%
<i>Total (Shan States)</i>	<i>41,000</i>	<i>30,800</i>	<i>-25%</i>
Outside Shan State*	3,200	2,000	-38%
National Total	44,200	32,800	-26%

*In 2004, this included estimates for Kachin State, Sagaing Division and Kayah State. In 2005, only Kachin State was covered.

Potential 2005 opium yield

Administrative Unit	Production (metric tons)
North Shan	25
South Shan	151
East Shan	21
Special Region 2 (Wa)	96
Total Shan State	293
Kachin State	19
Rounded National Total	312

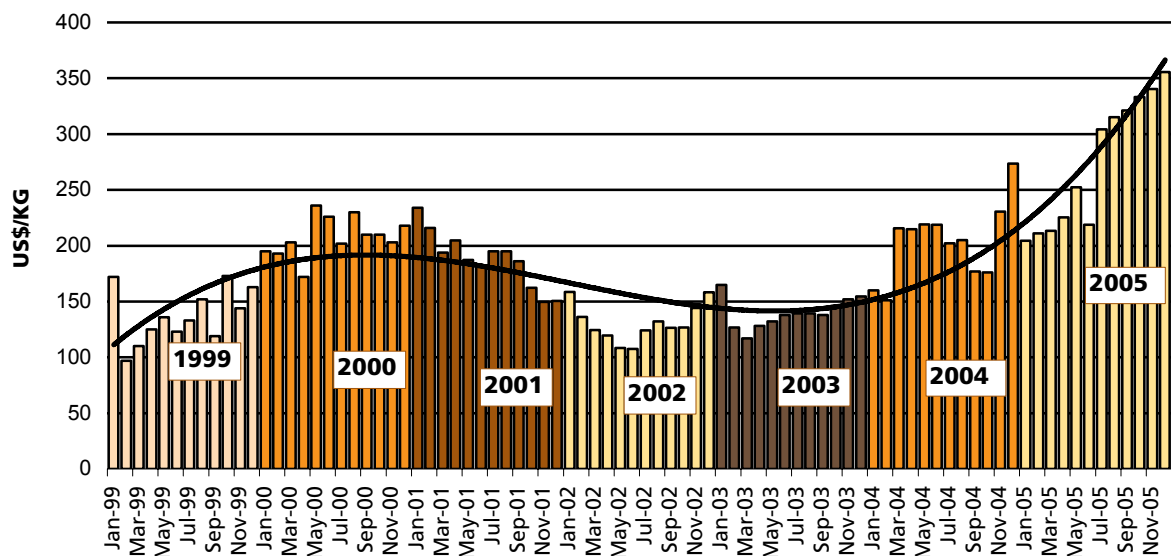
Myanmar opium production (metric tons), 1990-2005



Monthly Opium Prices at the Mong Pawk Market, Wa Special Region 2, Eastern Shan State (US\$/Kg), 1999-2005

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	234	216	194	205	187	182	195	195	186	162	150	151
2002	158	136	124	119	108	107	124	132	127	127	144	158
2003	165	126	117	128	132	138	146	139	137	146	152	155
2004	160	151	216	215	219	219	202	205	177	176	230	273
2005	204	211	213	225	252	219	304	315	321	333	341	356

Monthly opium prices at the Mong Pawk Market, Wa Special Region 2, Eastern Shan State (US\$/Kg), 1999-2005



Average opium poppy prices in the Shan State at harvest time (US\$/kg)

Region	2004		2005	
	Non growing villages	Growing villages	Non growing villages	Growing villages
East Shan	175	124	236	139
North Shan	175	165	239	187
South Shan	152	130	195	178
S.R. 2 (Wa)	N/a	177	N/a	192
Weighted National Average	US\$ 153		US\$ 187	

Average household income for opium poppy growing and non-growing villages in Shan State (US\$), 2005

Source of Income	Average Household Income	
	In non-opium poppy growing villages	In opium poppy growing villages
Salaries	53	34
Rice	77	35
Remittances	37	5
Other agricultural crops	54	24
Livestock and poultry	56	28
Opium	0	152
Handicraft and trading	9	1
Forest product	11	0
Other	67	14
Total	364	293

Regional distribution of opium addiction in the Shan State, as reported by village headmen, 2005

	North Shan	South Shan	East Shan	S. R. 2 (Wa)	Total Shan State
% of total addicts in Shan State	17%	30%	42%	11%	100%

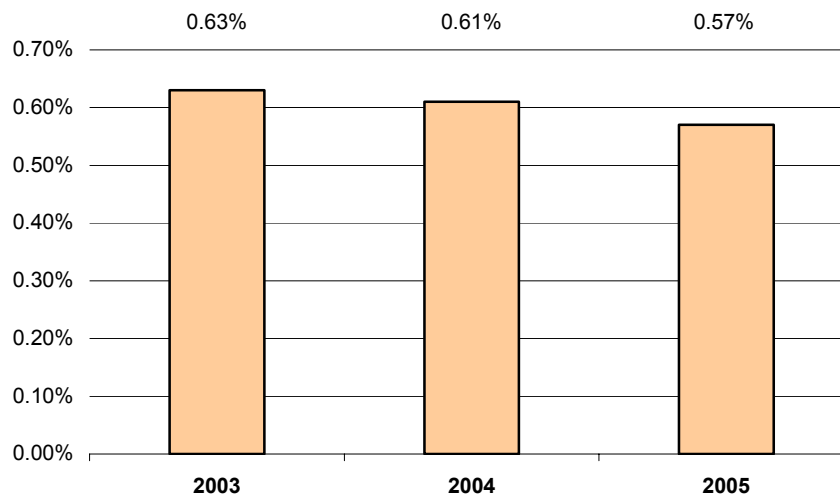
Gender distribution of opium addiction in the Shan State, as reported by village headmen, 2005

	North Shan	South Shan	East Shan	S. R. 2 (Wa)	Total Shan State
% male addicts	93%	97%	80%	77%	87%
% female addicts	7%	3%	20%	23%	13%

Opium addiction in the Shan State, as reported by village headmen, 2005

Village grouping	Number of villages sampled	Total population (age 15 and above)	Number of addicts	% of opium addicts in population (age 15 and above)
Villages growing opium	148	17,566	306	1.74%
Villages not growing opium	323	69,744	194	0.28%
Total villages sampled	471	87,310	500	0.57%

Prevalence of opium addiction of population aged 15 and above in the Shan State, 2003-2005

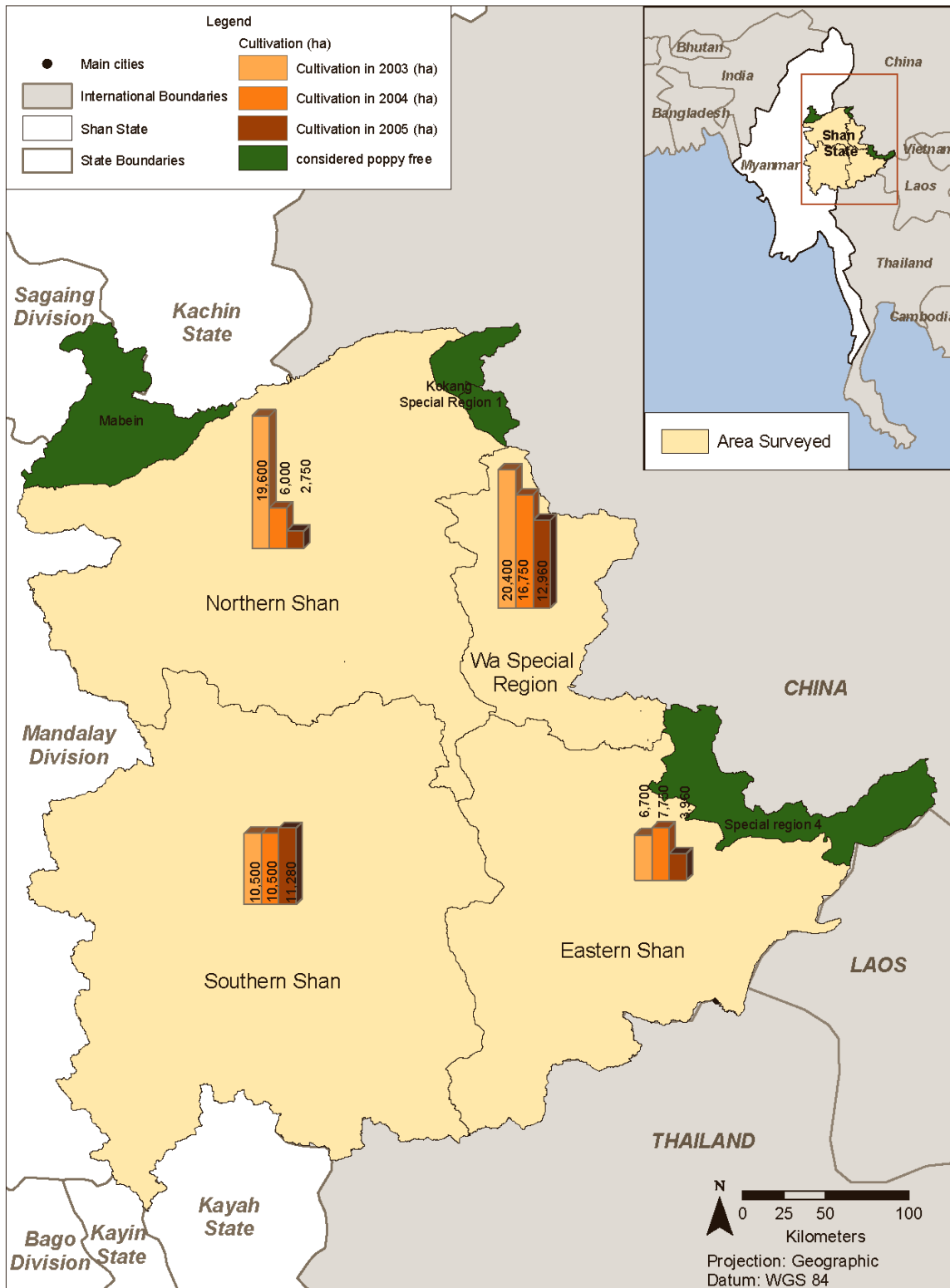


Myanmar, official eradication figures, 2004-2005

Administrative Unit	2004 (ha)	2005 (ha)	Variation (%)
<i>North Shan State</i>	172	1,211	604%
<i>South Shan State</i>	2,170	1,203	-45%
<i>East Shan State</i>	195	124	-36%
<i>S. R. 2 (Wa)</i>	0	0	-
Shan State	2,537	2,538	-
Kachin State	126	1,341	964%
Chin State	0	3	-
Sagaing	74	17	-77%
Kayah State	83	8	-90%
Mandalay Division	0	0	-
Total	2,820	3,907	39%

Source: Central committee for drug abuse control (CCDAC, Myanmar)

Myanmar Shan State* opium poppy cultivation change, 2003-2005



*Opium poppy cultivation in the Shan state accounts for 90% of the national poppy area.
 Source: Government of Myanmar - National monitoring system supported by UNODC.

3.1.3. Lao PDR

For the first time in many years, it can be assumed that Lao People's Democratic Republic (Lao PDR) is no longer an important producer of opium or a supplier of illegal opiates to the world market. Since the government's decision to eradicate opium poppy cultivation, the area cultivated has experienced a steady decline.

Area under opium poppy cultivation declines significantly

The total area under opium poppy cultivation for the 2005 season was estimated at 1,800 ha, a decrease of 73 per cent compared to the previous year. The number of households engaged in opium poppy cultivation decreased from 22,800 in 2004 to 6,200 in 2005, representing 2 per cent of the total households in the north of the country. (Northern Laos).

Estimated opium production drops by 67 per cent, compared to 2004

The average national opium yield for 2005 was estimated at 8 kg/ha, which results in an estimate of 14 mt production of opium for the year 2005. This is a 67 per cent reduction compared to 2004.

Opium prices increase by 139 per cent, reflecting the scarcity of opium

The average farm gate price of opium was US\$ 521, which represents an increase of 139 per cent compared to the price of the previous year. This huge increase reflects the scarcity of opium produced during this season due to the reduction of opium poppy cultivation.

Opium production associated with poverty

The average annual cash income of opium producing households was estimated at US\$ 139 (1,457,000 Lao kip-LAK), while the average annual cash income of a non-opium producing household was US\$ 231 (2,418,000 LAK). This discrepancy indicates that opium production is linked to poverty, as opium producing households are often characterized by lower productivity due to addiction of one or several of their members.

Average addiction rate is 1 percent, higher among men than among women

Opium addiction is a phenomenon affecting mainly men. In 2005, the average drug addiction rate (in 10 northern provinces) was 1 per cent among the population aged 15 years and above. Opium addiction is more widespread among men than among women (1.5 per cent men vs. 0.6 per cent women in the sample). As a general trend, addiction is declining in the country.

Eradication

The Government of the Lao People's Democratic Republic reported the eradication of 2575 ha of opium poppy during the 2004-2005 growing season.

Fact sheet: Lao PDR Opium Survey 2005

	2004	Variation on 2004	2005
Opium poppy cultivation	6,600 ha	-73%	1,800 ha ⁸
Average opium yield	6.5 kg/ha	-	8 kg/ha
Potential production of opium	43 mt	-67%	14 mt
Number of villages growing opium poppy	846	-68 %	270
Number of households cultivating opium poppy	22,800	-73 %	6,200
Average farm gate price of opium	2,280,000 kip/kg (US\$218/kg)	139%	5,461,000 kip/kg (US\$521/kg) ⁹
Total potential value of opium production	US\$9,400,000	-21 %	US\$7,378,000
Average annual cash income of opium poppy growing households	n.a.	-	1,457,000 kip (US\$139) ¹⁰
Opium growing households with rice deficit	n.a.	-	57%
Average annual cash income of households not cultivating opium poppy	n.a.	-	2,418,000 kip (US\$231)
Non-opium growing households with rice deficit	n.a.	-	28%
Number of opium addicts ¹¹	28,000	-28%	20,160
Average drug addiction (10 northern provinces) rate ¹²	2.6%	-	1%

⁸The estimate does not account for eradication of standing crops after the survey.

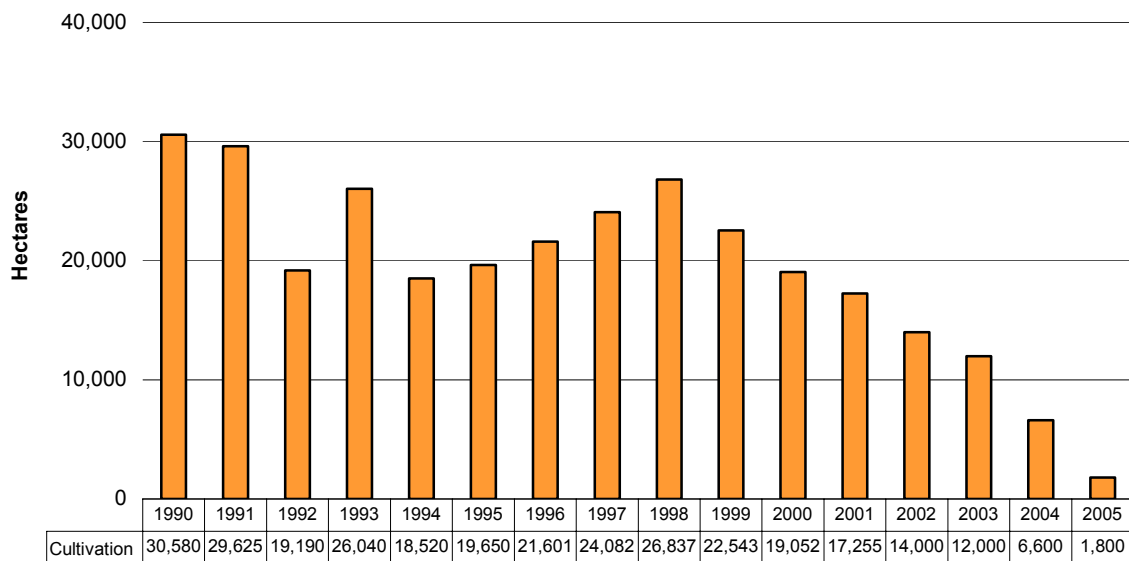
⁹ Based on an average exchange rate of 10,370 kip/US\$ from December 2004 to March 2005.

¹⁰ Based on an average exchange rate of 10,480 kip/US\$ from January 2004 to December 2004.

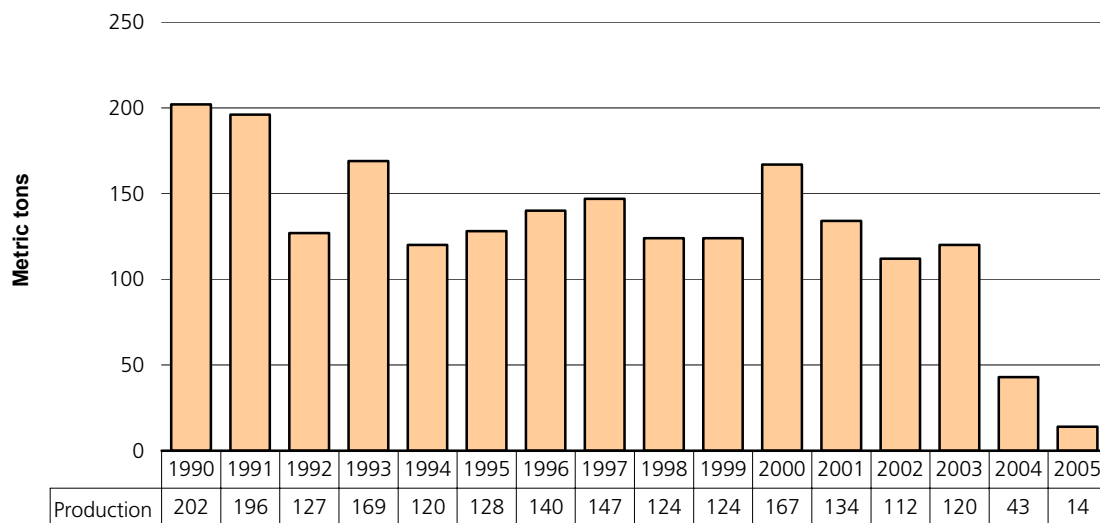
¹¹ Source: LCDC, May 2005. Figure refers to number of addicts in all 11 northern provinces.

¹² Refers to 11 northern provinces in 2004 and to 8 northern provinces in 2005.

Lao PDR, opium poppy cultivation (ha), 1990-2005



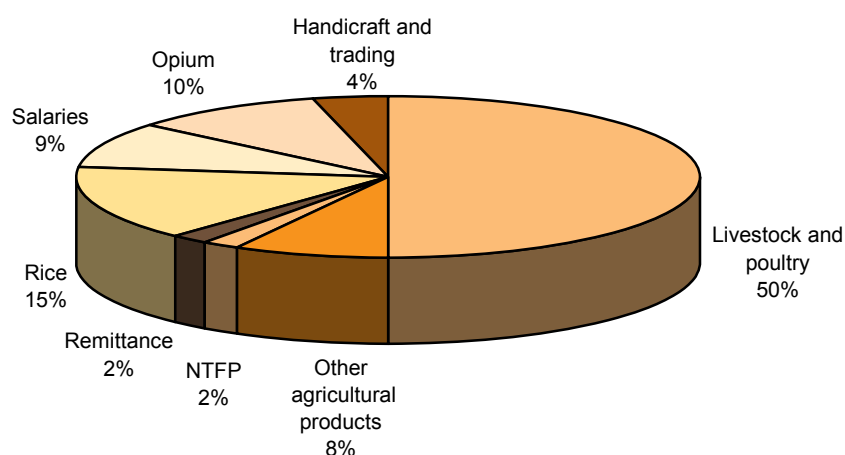
Lao PDR, potential opium production (metric tons), 1990-2005



Lao PDR, Evolution of the value of opium production, 2002-2005

Year	2002	2003	2004	2005
Price per kg of opium (KIP)	1,600,000	1,824,000	2,280,000	5,461,000
KIP/\$ Exchange rate	10,166	10,590	10,441	10,370
Price per kg of opium (\$)	\$160	\$172	\$218	\$521
Value of Production (\$ million)	18	21	9.4	7.4
Variation	-	17%	-55%	-21%

Average sources of village household income



Lao PDR, Number of opium addicts 2000-2005

Year	Addicts
2000	63,000
2001	58,000
2002	53,000
2003	30,000
2004	29,000
2005	20,000

Opium addiction by province in Laos, 2003-2005

Province	Total population	Addicts 2003	Addicts 2004	Addicts 2005	Prevalence %	Variation 2003/2005
Huaphanh	270,100	5,368	4,881	3,948	1.5	-26%
Luang Namtha	138,000	2,896	2,042	1,400	1	-52%
Luang Prabang	384,300	5,513	5,368	3,000	0.8	-46%
Oudomxay	250,800	3,012	3,088	2,085	0.8	-31%
Phongsaly	150,000	5,362	5,872	3,997	2.7	-25%
Xieng Khouang	222,000	3,158	2,898	2,157	1	-32%
Bokeo	145,000	793	1,119	700	0.5	-12%
Xayabouli	365,400	1,301	1,301	1,213	0.3	-7%
Borikhamxay	212,800	686	657	423	0.2	-38%
Vientiane Province	365,000	1,356	1,342	1,113	0.3	-18%
Xaisomboun SR	34,800	516	378	124	0.4	-76%
Total	2,538,200	29,961	28,946	20,160	0.8	-33%

Source: LCDC, May 2005

Opium poppy eradication as reported by the Lao Government (ha)

Year	Hectares
2003	4,134
2004	3,556
2005	2,575

3.1.4. Colombia

In Colombia, opium is harvested in the form of latex. This is unlike in Asia where opium is harvest as a denser gum. In Colombia, opium poppy cultivation is confined to the mountainous areas because it requires low temperatures at some stages in the growth cycle. Opium poppy is therefore not found in association with coca cultivation, which is rather located on the low land.

Area under opium poppy cultivation decreases

The Colombian Anti-narcotics police (DIRAN) estimates the area under opium poppy cultivation at about 1,950 hectares in 2005, a decrease of 51 per cent against the 3,950 hectares of 2004.

Colombia's share in world heroin production falling

According to DIRAN and the United States Government, opium poppy fields in Colombia yield about 15 kg per opium latex per hectare and harvest. Assuming an average of two harvests per year, total opium latex production of 2005 is estimated at 59 metric tons, an equivalent of 2.5 metric tons of heroin. This represents 0.5 per cent of the global heroin production of 472 metric tons compared to 1 per cent in 2004.

Prices increase while the area under cultivation shrinks

The decrease in the cultivation area was associated with a marked increase in prices. Opium latex prices from the Sur de Bolivar and Pacific regions have continuously risen since May 2005. This trend is clearly shown in the development of annual average prices of opium latex prices which grew from US\$ 164/kg in 2004 to US\$ 220/kg in 2005, an increase of 34 per cent. Heroin also became more expensive: Annual average prices of heroin went up from US\$ 7,635/kg in 2004 to US\$ 9,050/kg in 2005, an increase of 19 per cent.

Eradication

For 2005, DIRAN reports the spraying of 1,624 hectares and the manual eradication of 497 hectares of opium poppy. The area sprayed decreased 47 per cent and the area eradicated manually 38 per cent against 2004 (3,062 hectares and 804 hectares respectively).

Fact sheet: Colombia opium cultivation and production

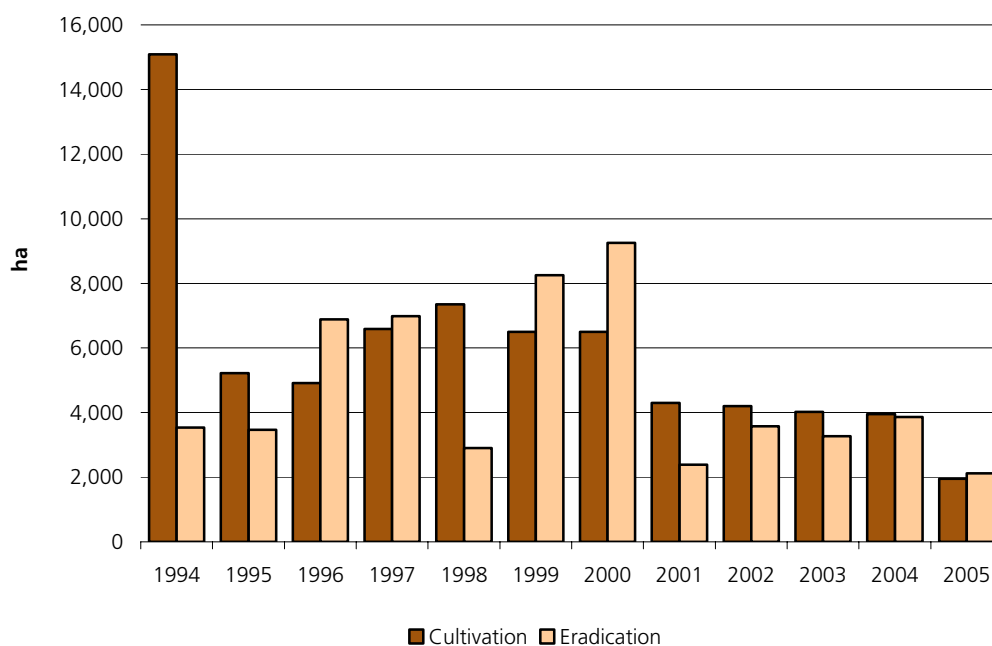
	2004	Variation on 2004	2005
Reported opium poppy cultivation (rounded)	3,950 ha	- 51%	1,950 ha
Reported eradication of opium poppy	3,866	- 45%	2,121 ha
Average farm-gate price of opium latex	US\$ 164 /kg	+ 40%	US\$ 230 /kg
Potential opium latex production	119 mt	- 50%	59 mt
Potential heroin production	5 mt	- 50%	2.5 mt
Average heroin price	US\$ 7,635 /kg	+ 19%	US\$ 9,050
Reported seizure of heroin	773 kg	- 4%	745 kg
Reported destruction of illegal laboratories ¹³	1,865	+ 5%	1,953

¹³ Includes laboratories processing coca paste/base, cocaine hydrochloride, heroin, morphine, Potassium permanganate, and non-specified

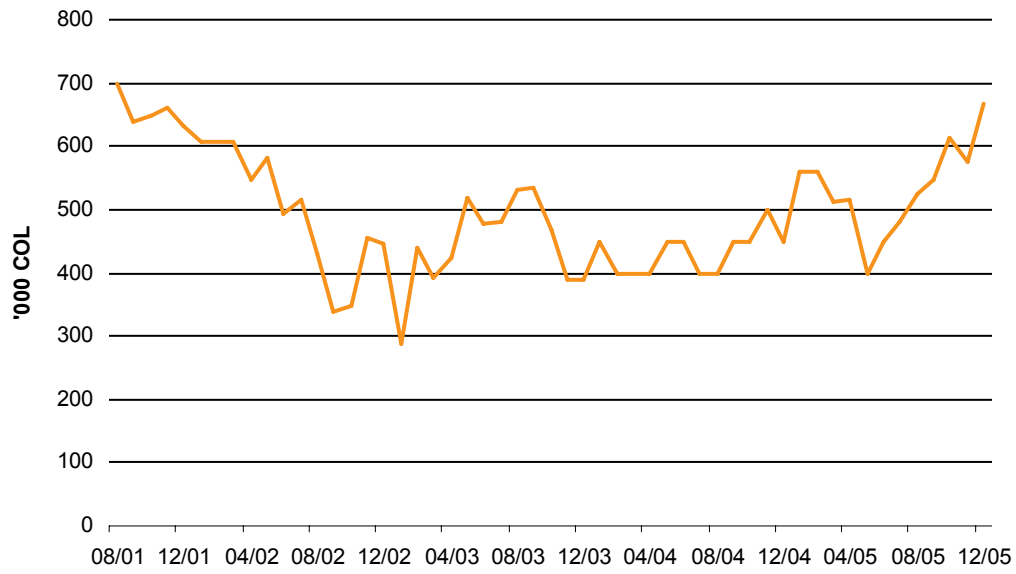
Reported cumulative eradication of opium poppy by department and year (ha), 1994 – 2005

Sources:	Environmental Audit of the National Narcotics Bureau							Antinarcotics Police Department				
Department	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Antioquia	-	-	120	-	-	-	-	-	-	-	-	-
Caqueta	-	-	-	383	-	-	-	-	401	-	39	20
Cauca	102	53	123	50	-	828	1,601	387	236	550	435	69
Cesar	128	305	713	91	650	125	423	426	548	1,004	505	56
Guajira	81	177	371	-	50	-	-	-	-	75	18	-
Huila	2,057	1,383	715	2,175	749	1,426	2,421	429	545	391	913	454
Nariño	-	-	-	-	-	313	1,090	630	788	725	342	626
Tolima	1,169	1,549	4,843	4,290	1,452	5,557	3,720	194	854	250	810	399
Sub-total	3,537	3,466	6,885	6,988	2,901	8,249	9,254	2,066	3,371	2,995	3,062	1,624
Manual eradication	-	-	-	-	-	-	-	319	213	271	804	497
Total	3,537	3,466	6,885	6,988	2,901	8,249	9,254	2,385	3,577	3,266	3,866	2,121

Comparison of net opium poppy cultivation and cumulative eradicated area (ha), 1994 - 2005



Colombia, monthly opium latex prices ('000 COL), 2001 – 2005



3.1.5. Seizure of Illicit Laboratories

**MANUFACTURE
SEIZURES OF ILLICIT LABORATORIES
REPORTED FOR 2003 - 2004**

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 (annual production capacity)	Source
OPIATE GROUP				
Americas				
<u>North America</u>				
Canada	2003	Heroin	1 Lab.	
Mexico	2003	Heroin	3 Lab.	
	2004	Heroin	1 Lab.	
Subtotal North America			5 Lab.	
<u>South America</u>				
Colombia	2003	Heroin	3 Lab.	Govt
	2004	Morphine	1 Lab.	
	2004	Heroin	8 Lab.	
Subtotal South America			12 Lab.	
Total Americas			17 Lab.	
Asia				
<u>East and South-East Asia</u>				
<i>Hong Kong SAR, China</i>	2003	Heroin	3 Lab.	
	2004	Heroin	1 Lab.	
Myanmar	2003	Heroin	7 Lab.	
	2004	Heroin	2 Lab.	
Subtotal East and South-East Asia			13 Lab.	
<u>Near and Middle East /South-West Asia</u>				
Afghanistan	2003	Opium	12 Lab.(38000.000 kg)	
	2003	Morphine	12 Lab.(3800.000 kg)	
	2003	Heroin	(3780.000 kg)	
	2004	Heroin	125 Lab.	
Subtotal Near and Middle East /South-West Asia			149 Lab.(45580.000 kg)	
<u>South Asia</u>				
India	2003	Heroin	2 Lab.	
	2003	Morphine	2 Lab.	
	2004		3 Lab.	
Subtotal South Asia			7 Lab.	
Total Asia			169 Lab.(45580.000 kg)	
Europe				
<u>East Europe</u>				
Belarus	2004	Methadone	1 Lab.(0.196 kg)	
Moldova, Rep.	2004		191 Lab.	

Country or Territory	Year	Name of drug seized	Number of laboratories (annual production capacity)	Source
Russian Federation	2003		304 Lab.	
	2004		443 Lab.	
	2004	Morphine	3 Lab.	
	2004	Heroin	2 Lab.	
Subtotal East Europe			944 Lab.(0.196 kg)	
<u>Southeast Europe</u>				
Romania	2003	Heroin	1 Lab.	
Turkey	2004	Heroin	1 Lab.	
Subtotal Southeast Europe			2 Lab.	
<u>West & Central Europe</u>				
Poland	2003	Polish heroin	13 Lab.	
Portugal	2003	Heroin	1 Lab.	
Subtotal West & Central Europe			14 Lab.	
Total Europe			960 Lab.(0.196 kg)	
Oceania				
<u>Oceania</u>				
Australia	2004	Heroin Homebake	5 Lab.	
Subtotal Oceania			5 Lab.	
Total Oceania			5 Lab.	
Opiate group			1151 Lab.(45580.196 kg)	