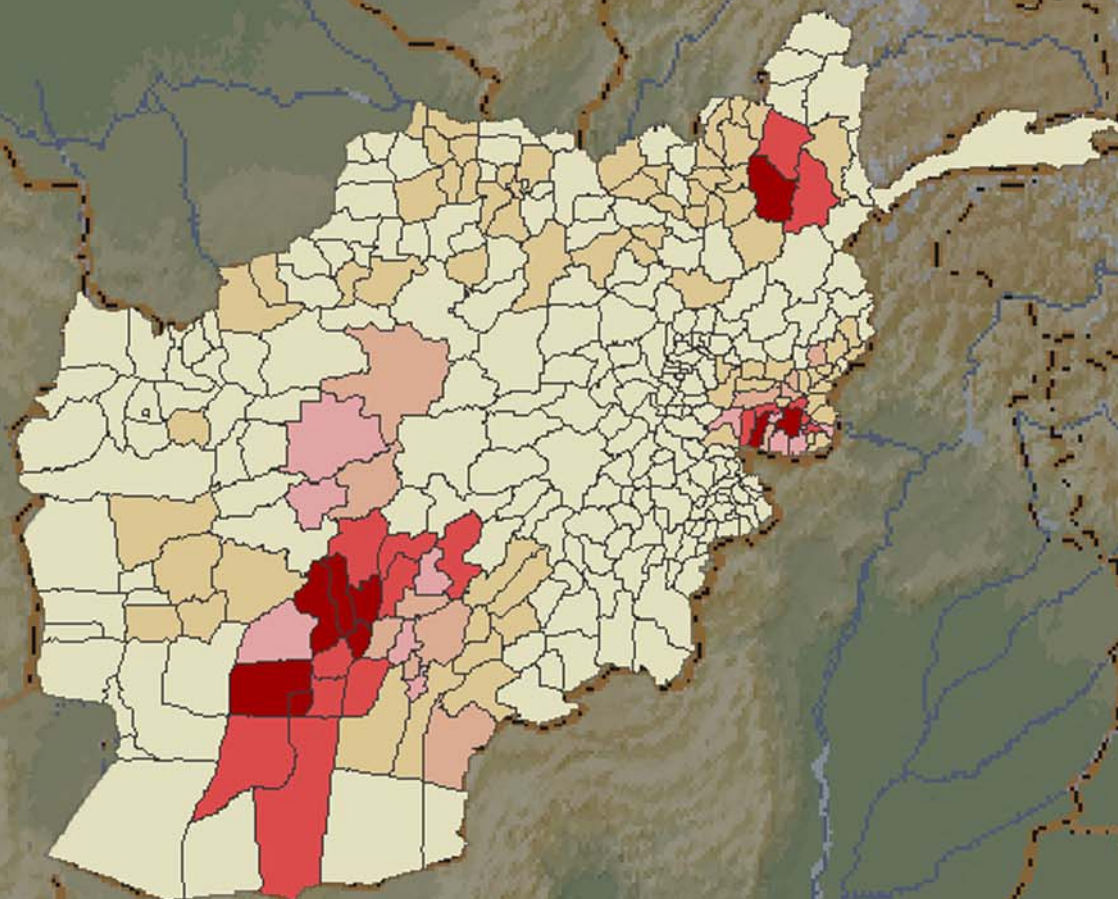


AFGHANISTAN

Opium Survey 2002



Executive Summary

1 Executive summary

Background

Annual opium survey in Afghanistan

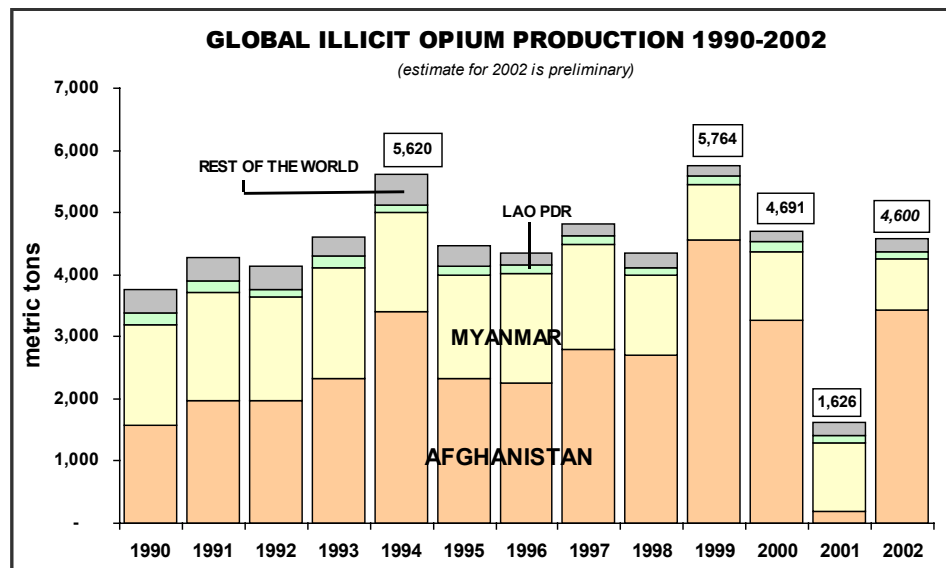
The United Nations Office for Drug Control and Crime Prevention (UNODCCP) has conducted an annual opium poppy survey in Afghanistan since 1994. The survey collects and analyses information on the location and extent of opium poppy cultivation, on the potential production of opium, as well as on opium prices in that country. The results provide a detailed picture of the current year's opium season and enable the identification of trends. This information is essential for planning, implementing and monitoring the impact of the measures required for tackling a problem which, in a country that has become by far the largest source of illicit opium and heroin trafficked in the world, has clearly assumed international dimensions.

UNODCCP's opium survey in Afghanistan is implemented in the technical framework of its global Illicit Crop Monitoring Programme (ICMP). The objective of ICMP is to assist the international community in monitoring the extent and evolution of illicit crops in the context of the elimination objective adopted at the General Assembly Special Session on Drugs in June 1998.

The 2002 survey was funded and organized under the project AD/AFG/F98 "Monitoring of opium production in Afghanistan" and the project AD/GLO/C93 "Support to the development of an international monitoring mechanism for illicit crops". The Governments of the United Kingdom, Italy, Finland, Belgium and France provided funding for those projects.

The high level of opium poppy cultivation in Afghanistan

During the 1990s, Afghanistan firmly established itself as the largest source of illicit opium and its derivative, heroin, in the world. By the end of the 1990s, Afghanistan provided about 70% of global illicit opium production, well ahead of Myanmar (about 22%) and Lao PDR (about 3%). Primarily supplying countries in South West Asia, Central Asia, East and West Europe, as well as in South Asia, the Arabian peninsula and Africa, illicit opiates of Afghan origin were consumed by an estimated 9 million abusers, which is two-thirds of all opiate abusers in the world. It can be estimated that,



all along the trafficking chain, about half a million people have been involved in the trade of illicit Afghan opiates in recent years. Although these numbers are only approximate, UNODCCP also estimates that the overall turnover of illicit international trade in Afghan opiates can be roughly estimated at US\$ 25 billion annually.

An abrupt decline of illicit opium poppy cultivation was recorded in Afghanistan in 2001, following the ban imposed by the Taliban regime in its last year in power. Despite the existence of significant stocks of opiates accumulated during previous years of bumper harvests, the beginning of a heroin shortage became apparent on some European markets by the end of 2001. Furthermore, the absence of the usual harvest in Afghanistan in spring 2001 and the subsequent depletion of stocks pushed opium prices upwards to unprecedented levels in the country (prices increased by a factor of 10), creating a powerful incentive for farmers to plant the 2002 crop.

The power vacuum in Kabul caused by the aftermath of 11 September 2001 enabled farmers to replant opium poppy (starting in October/November 2001). By the time the Afghan Interim Administration was established and issued a strong ban on opium poppy cultivation, processing, trafficking and consumption (17 January 2002), most opium poppy fields had already started to sprout.

In February 2002, a two-week rapid assessment survey launched by UNODCCP in the traditional opium growing areas of southern and eastern Afghanistan provided the basic evidence to confirm the resumption of opium poppy cultivation on a large scale. This survey did not cover all the growing areas. Due to a later and more staggered planting than usual, some opium fields could not even be seen during the February 2002 field visits by the UNODCCP surveyors. A full survey was therefore required for a comprehensive and reliable assessment of the problem. It was launched by UNODCCP in March 2002 and completed in September 2002. The present text summarises the findings.

Methodology

Due to the events of 11 September 2001 and the subsequent armed conflict, UNODCCP's annual survey faced a difficult and dangerous security environment on the ground.

In April 2002, at the onset of the opium harvest in eastern and southern Afghanistan, the Afghan Interim Administration (AIA) launched an eradication campaign (with compensations). Some farmers' reactions to this measure resulted in a temporary deterioration of the security situation for UNODCCP's surveyors who were withdrawn from the opium poppy growing areas. As the field work stopped, UNODCCP quickly adapted the methodology to ensure a continuation of the survey. Instead of running a census ground survey complemented with limited satellite imagery, the 2002 survey was based on high-resolution satellite images complemented by extensive ground truthing and targeted ground surveys. In total, UNODCCP field surveyors visited 923 villages in 84 districts of 16 provinces.

High-resolution satellite images ensured a sample-based coverage of all the main opium growing areas, regardless of the security situation. To improve the interpretation of the images as well as to account for staggered planting, images of the same areas were acquired twice, with a one-month interval. As soon as the security situation permitted, UNODCCP surveyors went back to the opium growing areas where they collected GPS coordinates of opium poppy fields in about 600 different locations. This information was crucial to ensure an accurate interpretation of the satellite images (ground truthing). Independent of the satellite-based survey, a sample ground survey

was carried out in the North of Afghanistan. It provided similar results as the satellite-based survey, confirming the validity of the methodology used. Some ground survey activities were also carried out in the East in Nangarhar and in central Afghanistan in the province of Ghor.

Data on yield and productivity were collected for both irrigated and rain-fed poppy cultivation through farmer interviews by UNODCCP surveyors in three provinces: Helmand, Nangarhar and Badakhshan. The yield survey was conducted on a random sample basis during or after the main opium harvest period. Data on opium prices were collected at various locations.

Findings

Opium poppy cultivation

The total opium poppy cultivation in Afghanistan in 2002 was estimated to range from 69,000 hectares (ha) to 79,000 ha, with a mean estimate of 74,000 ha.

This level of opium poppy cultivation compares with levels reached during the mid to late 1990s. Although it remains lower than the record levels of 1999 (about 90,500 ha) and 2000 (about 82,000 ha), it confirms that opium poppy cultivation has resumed to high levels, after the considerable decline recorded in 2001.

Afghanistan opium poppy cultivation from 1994 to 2002 (in ha)

	1994	1995	1996	1997	1998	1999	2000	2001	2002
Rounded total	71,000	54,000	57,000	58,000	64,000	91,000	82,000	8,000	74,000

Potential opium production

The average opium yield was estimated at 46 kg per hectare, a significant increase compared to last year's overall yield of 24 kg/ha. The reasons for this increase are twofold : (a) opium poppy cultivation has resumed on irrigated land in southern and eastern Afghanistan, which are significantly more productive; and (b) climatic conditions were more favourable than before, after the end of the drought which affected Afghanistan over the last few years.

As a result, the total potential opium production in Afghanistan in 2002 is estimated to amount to 3,400 metric tons (range: from 3,200 mt to 3,600 mt), a considerable increase compared to 2001, but a 25% decline from the record production of 1999 (4,600 mt).

Afghanistan opium production from 1994 to 2002 (in tons)

	1994	1995	1996	1997	1998	1999	2000	2001	2002
Rounded total	3,400	2,300	2,200	2,800	2,700	4,600	3,300	185	3,400

Geographical distribution

Opium poppy cultivation was found in 24 out of a total of 32 provinces in Afghanistan this year. However, in line with the usual pattern (with the exception of 2001), almost 95% of the cultivation was concentrated in just five provinces. Helmand in the South came first, with nearly 30,000 ha, followed by Nangarhar in the East (about 20,000 ha), Badakhshan in the North (about 8,000 ha), Uruzgan in the South/Center (about 5,000 ha) and Kandahar in the South (about 4,000 ha).

Provincial ranking of opium poppy cultivation and production in 2002

Province	Cultivation (in ha)	% of country total	Production (in tons)	% of country total
Helmand	29,950	40%	1,300	38%
Nangarhar	19,780	27%	1,030	30%
Badakhshan	8,250	11%	300	9%
Uruzgan	5,100	7%	230	7%
Kandahar	3,970	5%	180	5%
Country	74,000		3,400	

Opium prices

Opium prices in Afghanistan changed considerably during the last two years. After a long period of relative stability (1994-2000) and prices as low as US\$ 30 per kg, opium prices skyrocketed in 2001 following the enforcement of a ban on opium poppy cultivation. Between mid-2000 and the harvest time of 2001, opium prices increased ten-fold from US\$ 30 per kg to about US\$ 300 per kg, and then doubled again to reach a record-high of about US\$ 700 per kg in early September 2001. Immediately after 11 September, opium prices declined quickly to about US\$100 per kg, reflecting the closing of Afghanistan's borders and the off-loading of stocks by traders.

In early 2002, as measured by the survey, the average price for Afghan fresh opium increased again to US\$ 350 per kg. As the opium harvest is not brought at once to the markets and as opium prices movements are difficult to anticipate, the final average price for the 2002 opium production could differ from this estimate.

At current price levels (which would seem unlikely to persist given the resumption of large-scale opium production this year), and as a result of the combination of high level cultivation (74,000 ha) and good opium yield (46 kg/ha), the total income for the Afghan opium poppy farmers could reach several hundreds million US dollars this year. The value of the 2002 production will then reach a record high, far above earlier years (from 1994 to 2000, the estimated total annual income varied between a minimum of about US\$ 50 million and a maximum of about US\$ 200 million at the time of the bumper harvest in 1999).

At surveyed prices, and on the basis of an estimated average of 0.3 ha of opium poppy cultivation per opium poppy farmer, the 2002 average income per opium poppy farmer could amount to a few thousand dollars in 2002. In previous years the typical income was estimated at several hundred dollars, from US\$ 400 to 600. It is essential to bear in mind that these estimates do not refer to the country at large (where the average per family income remains one of the lowest in the world). Rather, the relatively high level of farming revenues refers to the few regions where the opium poppy cultivation is concentrated.

Agricultural land in opium growing areas

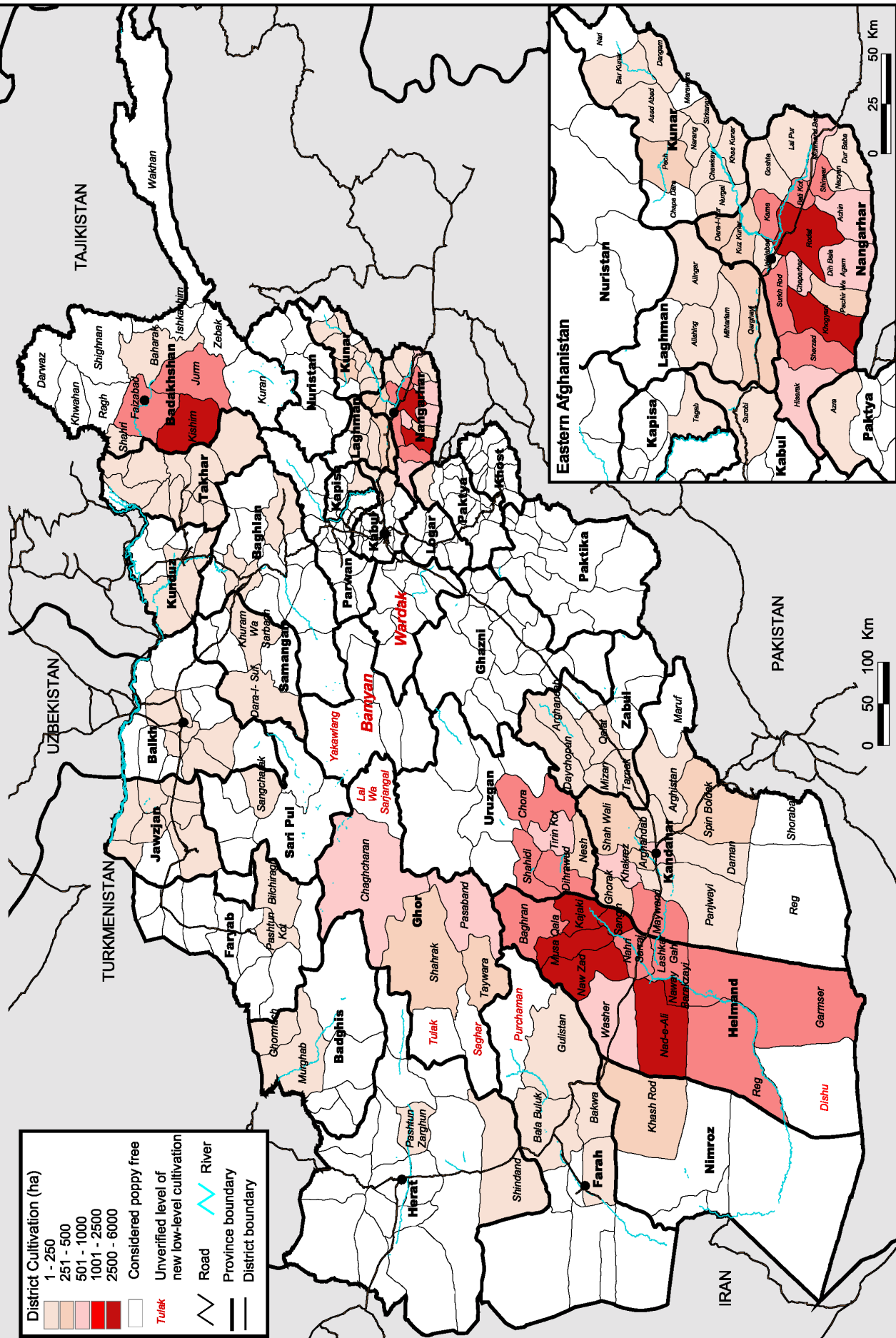
Another interesting finding of the survey is the evolution of the total agricultural land in Afghanistan during the last decade. Based on an update of the FAO 1993 land cover figures made by UNODCCP for the opium growing areas, it is estimated that the decline in arable land amounted to 37 % between the early and the late 1990s. This places the increased levels of opium poppy cultivation in a clearer perspective as it

further illustrates the shift of some regions in Afghanistan to an illicit opium economy during the last decade.

Conclusion

It would not be appropriate, however, to see Afghanistan as a country entirely dependent on illegal activity. As shown by the survey, a high level of economic dependency on opium poppy cultivation is limited to a few of the provinces which did not comply with the ban on opium poppy cultivation, processing, trafficking and abuse, issued on 17 January 2002 by President Karzai. The decree states that the continuing existence of an opium-based economy was a matter of national security and should be fought by all means. It also calls for greater international support to interdict the trade and offer alternatives to farmers. The findings reported above render this call for international support extremely important.

Map 1: Afghanistan Opium Poppy Cultivation, 2002



Source: UNDCP

Map 2: Afghanistan Opium Production, 2002

