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Islamic Republic of Afghanistan
Ministry of Counter Narcotics



Afghanistan

Opium Risk Assessment 2013

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ABBREVIATIONS

AGE	Anti Government Elements
GPS	Global Positioning System
ICMP	Illicit Crop Monitoring Programme (UNODC)
ORAS	Opium Winter Risk Assessment Survey
MCN	Ministry of Counter-Narcotics
UNODC	United Nations Office on Drugs and Crime

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EXECUTIVE SUMMARY

In 2013, the Opium Risk Assessment was carried out in two phases similar to the year before. The first phase was implemented between December 2012 and January 2013 and covered the Central, Eastern, Southern and Western region, where opium was sown in fall 2012.

The second phase took place in February-March 2013 and covered the Northern and North-eastern regions, where opium poppy is mainly cultivated in spring. This report presents the findings of both phases. According to the 2013 Opium Risk Assessment increases in poppy cultivation are expected in most regions and in the main poppy-growing provinces.

In the Southern region, the Risk Assessment indicated that the largest opium cultivating provinces, Hilmand and Kandahar, are likely to see an increase in opium cultivation due to the current high price of opium and to compensate the low opium yield in 2012 which was caused by a combination of a disease of the opium poppy and unfavourable weather conditions. An increase in opium poppy cultivation is also expected in Uruzgan and Zabul province. No major changes are expected in Daykundi province.

In the western provinces, namely in Farah and Ghor, opium cultivation is also expected to increase. A decrease in opium poppy cultivation is however expected in Hirat province. Increasing trends were reported from Nangarhar and Kapisa provinces in the Eastern region. No major changes in opium cultivation are expected in Nimroz, Badghis, Kabul, Kunar and Laghman provinces.

Balkh and Faryab in northern region are likely to see an increase in opium cultivation in 2013. These two provinces may lose their poppy-free status if timely effective eradication is not implemented. No major changes are expected in Baghlan province. The largest cultivating province in the north-east, Badakhshan is likely to see an increase in opium cultivation in 2013. The increase in opium cultivation is also expected in Takhar province. Takhar may lose its poppy-free status unless effective eradication is implemented in time. The remaining provinces in the northern and north-eastern regions are expected to remain poppy-free in 2013.

The Risk Assessment 2013 indicated that a strong association between insecurity, lack of agricultural assistance and opium cultivation continues to exist. Villages with a low level of security and those which had not received agricultural assistance in the previous year were significantly more likely to grow poppy in 2013 than villages with good security and those, which had received assistance. Similarly, villages which had been reached by anti-poppy awareness campaigns were significantly less likely to grow poppy in 2013.

Fear of eradication was the most frequent reason reported for not cultivating poppy in 2013 in Southern, Western, Eastern and Central region, unlike in previous years, when eradication was rarely mentioned by respondents. The large increase in eradication in 2012 compared to previous years and the fact that it happened in major poppy cultivating areas are likely reasons for this result. However, in the Northern and North-eastern region the most frequent reason for not cultivating opium was “not enough yield in the previous year” followed by the government’s opium ban.

The findings of the 2013 Opium Risk Assessment in the Southern, Eastern, Western and Central regions points to a worrying situation. The assessment suggests that poppy cultivation is not only expected to expand in areas where it already existed in 2012, e.g. in the area north of the Boghra canal in Hilmand province or in Bawka district in Farah province but also in new areas or in areas where poppy cultivation was stopped. In eastern Afghanistan, in Nangarhar province, farmers resumed cultivation even in districts where poppy has not been present for the last four years. In the Northern and North-eastern region, the provinces of Balkh and Takhar which were poppy-free for many years are at risk of resuming poppy cultivation.

On a more positive note, some provinces with a low level of poppy cultivation, namely Ghor, Kabul, Kapisa, Hirat Zabul and Baghlan may gain poppy-free status in 2013 if effective eradication is implemented on time.

1 GENERAL FINDINGS

Similar to 2011 and 2012, the 2013 Opium Risk Assessment has been carried out in two phases. In the first phase, the Southern, Western, Central and Eastern regions were surveyed between December 2012 and January 2013. The Northern and the North-eastern regions were covered during February-March 2013 since the sowing starts later in these regions. The Opium Risk Assessment is based on a relatively small sample of villages and is qualitative in nature. It provides an early, qualitative indication of probable cultivation trends but cannot capture minor proportional or absolute changes in opium cultivation. The assessment provides information on the risk that a certain development will take place based on the information available at that point in time. It is not meant to predict the level of area under opium cultivation at harvest time, which is also, influenced by (at the time of the survey) unknown factors such as climatic conditions (frost, drought) and eradication activities taking place later in the growing season. The trend categories used in the 2013 Opium Risk Assessment reflect this uncertainty. The category “no major change” includes minor changes which - given the nature of the assessment - were not strong enough to indicate a clear increase or decrease.

The results of the qualitative assessment by province are the following:

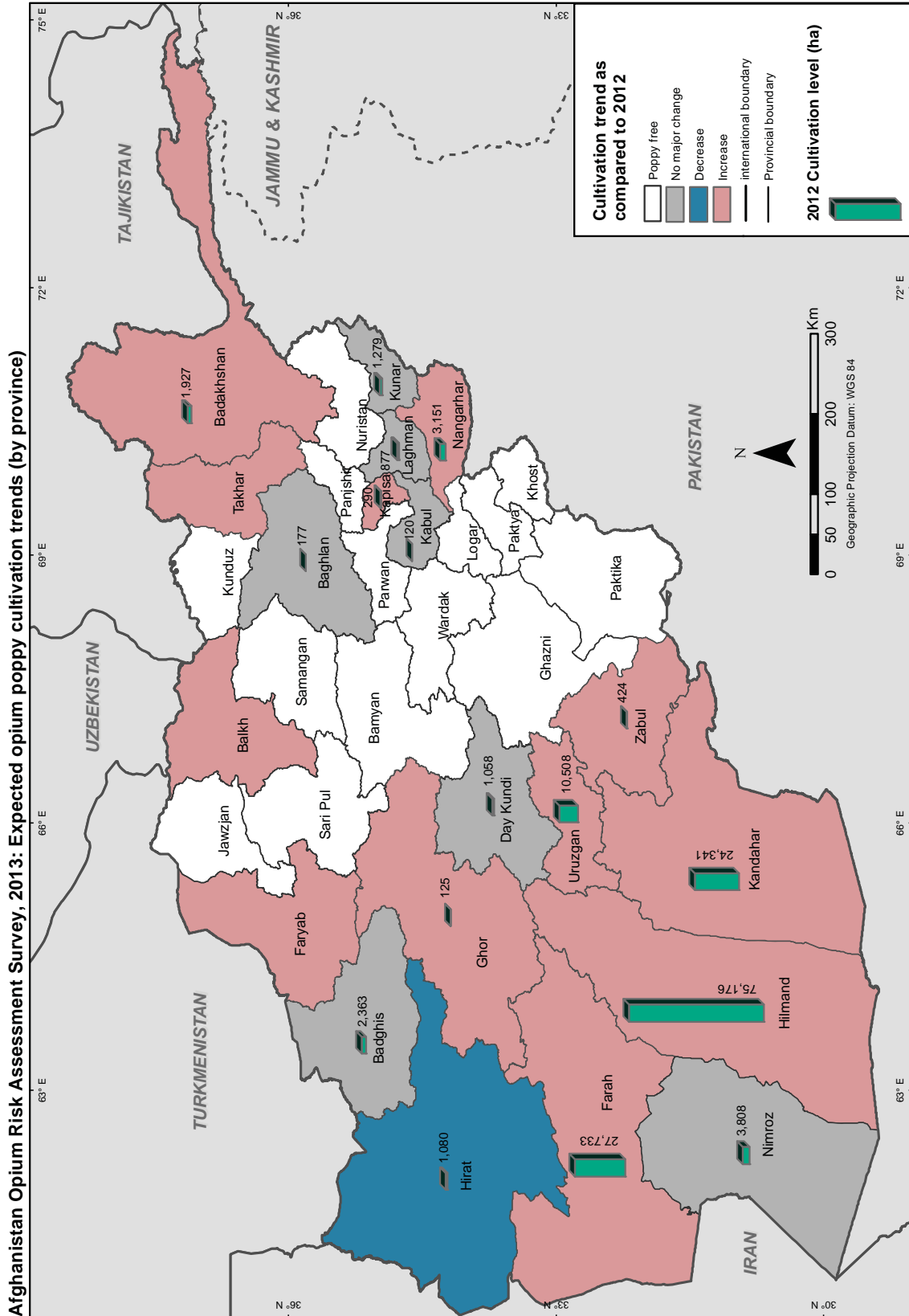
- A decrease in opium cultivation is expected in Hirat province.
- No major changes in opium cultivation are expected in Baghlan, Badghis, Daykundi, Nimroz, Kabul, Kunar and Laghman provinces.
- Twelve Provinces namely Badakhshan, Hilmand, Kandahar, Farah, Nangarhar, Uruzgan, Zabul, Ghor and Kapisa are likely to show an increase in opium cultivation.
- Increase in opium cultivation is also expected in Balkh, Faryab and Takhar provinces. These three provinces may lose their poppy-free status unless timely and effective eradication is implemented in 2013.
- Fourteen provinces, Ghazni, Khost, Logar, Paktika, Paktya, Panjshir, Parwan, Wardak, Nuristan, Bamyán, Jawzjan, Samangan, Sari Pul and Kunduz which were poppy-free in 2012, are likely to remain so in 2013.

Timely eradication measures in provinces with very low levels of opium cultivation such as Kabul, Hirat, Kapisa, Faryab, Ghor, Balkh, Takhar and Baghlan could lead to achieving poppy-free status.

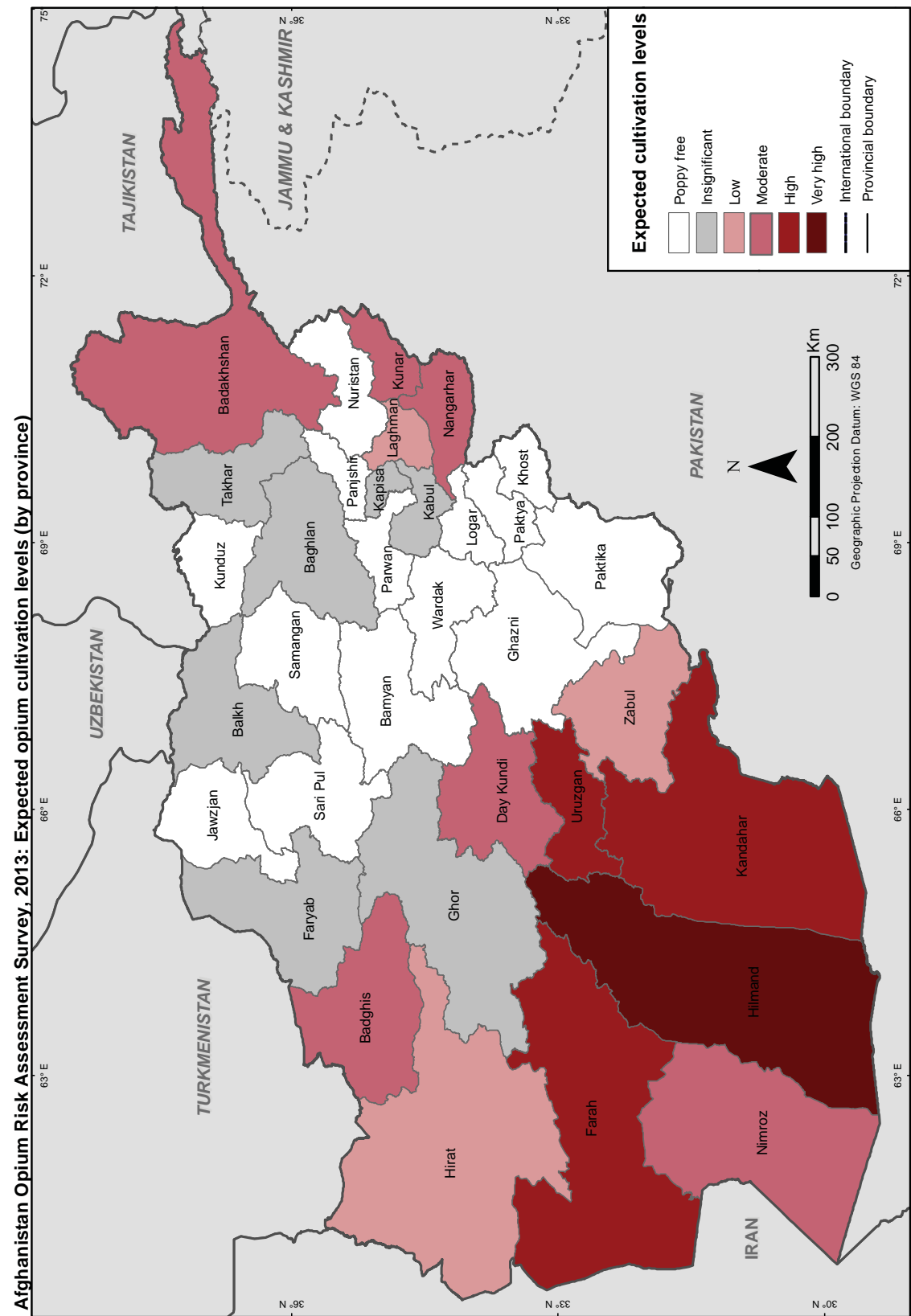
Table 1: Expected opium cultivation trends in 2013 at a glance (Phase 1&2)

Cultivation trend in 2012	No. of provinces	Provinces	Comments
Poppy free	14	Ghazni, Khost, Logar, Paktika, Paktya, Panjshir, Parwan, Wardak, Nuristan, Kunduz, Sari Pul, Samangan, Jawzjan and Bamyán	These provinces were poppy free in 2012 as well.
No major change	7	Baghlan, Daykundi, Nimroz, Badghis, Kabul, Laghman and Kunar	In 2012, poppy cultivation had increased in Baghlan, Nimroz, Laghman, Badghis, Kunar and Daykundi provinces.
Decrease	1	Hirat	In 2012, poppy cultivation had increased in Hirat.
Increase	12	Badakhshan, Balkh, Faryab, Takhar, Hilmand, Kandahar, Farah, Uruzgan, Nangarhar, Ghor, Zabul and Kapisa	In 2012, poppy cultivation had increased in Badakhshan, Baghlan, Farah, Hilmand, Ghor, Zabul and Nangarhar provinces. Uruzgan was stable in 2012 compared to 2011. Poppy cultivation had decreased in Kandahar province in 2012. Faryab, Balkh and Takhar were poppy-free in 2012.

Map 1 Expected opium cultivation trends in 2013 (by province)



Map 2: Expected opium cultivation level in 2013 (by province)



Map 3 Regional grouping of provinces for opium surveys in Afghanistan

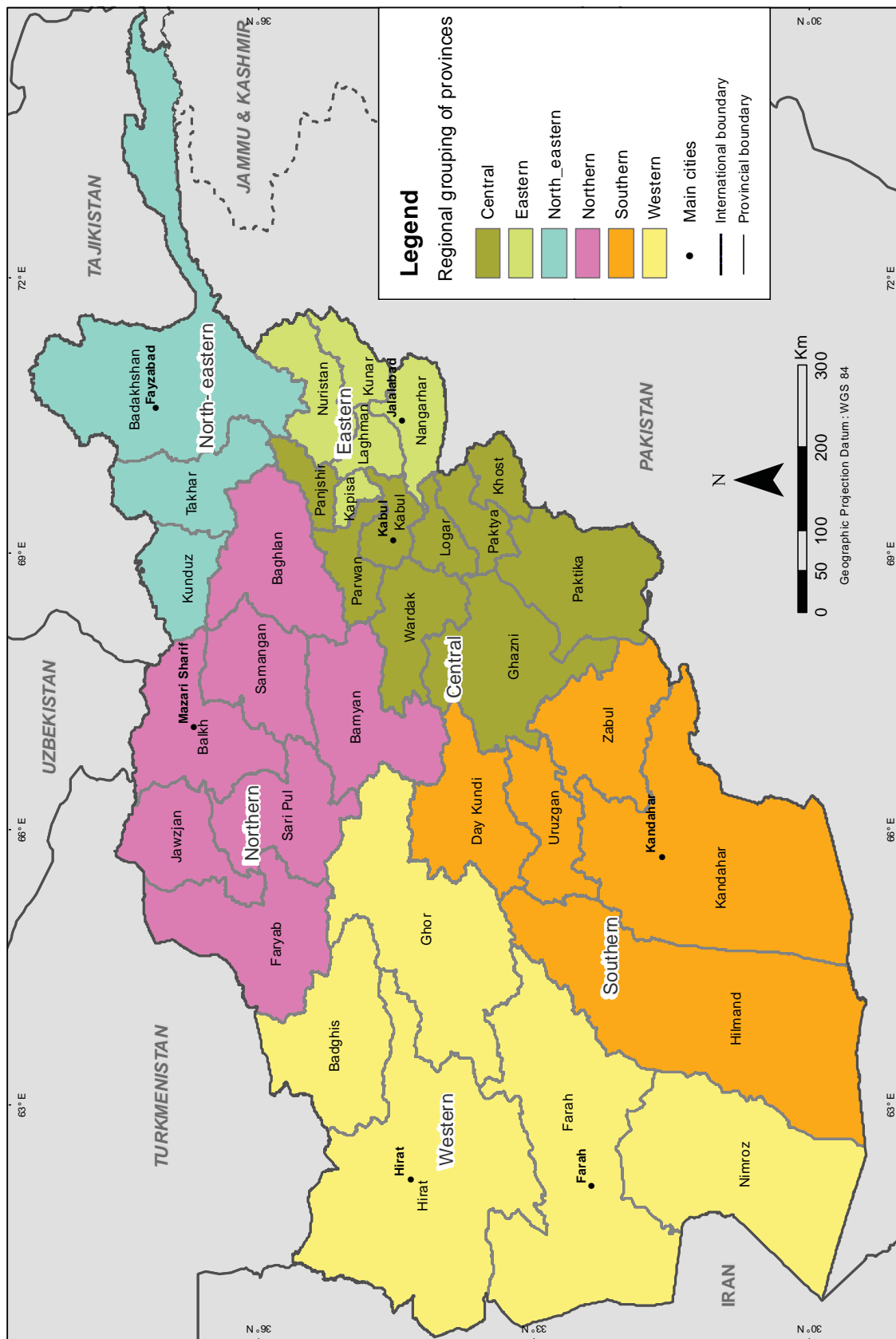


Table 2: Expected opium cultivation trends in 2013 (by province, results of Phase 1 & 2)

Phase	Region	Province	Cultivation 2012 (ha)	Expected opium cultivation change in 2013	Expected opium cultivation level
Phase-1	Central	Ghazni	Poppy free	No major change	Poppy free
		Kabul	120	No major change	Insignificant
		Khost	Poppy free	No major change	Poppy free
		Logar	Poppy free	No major change	Poppy free
		Paktika	Poppy free	No major change	Poppy free
		Paktya	Poppy free	No major change	Poppy free
		Panjshir	Poppy free	No major change	Poppy free
		Parwan	Poppy free	No major change	Poppy free
		Wardak	Poppy free	No major change	Poppy free
	Eastern	Kapisa	290	Increase	Insignificant
		Kunar	1,279	No major change	Moderate
		Laghman	877	No major change	Low
		Nangarhar	3,151	Increase	Moderate
		Nuristan	Poppy free	No major change	Poppy free
	Southern	Day kundi	1,058	No major change	Moderate
		Hilmand	75,176	Increase	Very high
		Kandahar	24,341	Increase	High
		Uruzgan	10,508	Increase	High
		Zabul	424	Increase	Low
	Western	Badghis	2,363	No major change	Moderate
Farah		27,733	Increase	High	
Ghor		125	Increase	Insignificant	
Hirat		1,080	Decrease	Low	
Nimroz		3,808	No major change	Moderate	
Phase-2	Northern	Balkh	Poppy free	Increase	Insignificant (may not be poppy free)
		Baghlan	177	No major change	Insignificant
		Bamyan	Poppy free	No major change	Poppy free
		Faryab	Poppy free	Increase	Insignificant (may not be poppy free)
		Jawzjan	Poppy free	No major change	Poppy free
		Samangan	Poppy free	No major change	Poppy free
		Sari Pul	Poppy free	No major change	Poppy free
	North-eastern	Badakhshan	1,927	Increase	Moderate
		Kunduz	Poppy free	No major change	Poppy free
		Takhar	Poppy free	Increase	Insignificant (may not be poppy free)

Trends by region

- **Southern region:** The Southern region is expected to remain the largest opium cultivating region in Afghanistan in 2013. Poppy cultivation in Hilmand and Kandahar, the main opium cultivating provinces in the country, is expected to increase and Hilmand is expected to retain its status as the largest opium cultivating province in the country. An increase in opium

cultivation is expected in Uruzgan and Zabul provinces as well. No major changes are expected in Daykundi province.

- **Western region:** Poppy cultivation in Farah, the second largest opium cultivating province in the country, is expected to increase in 2013. No major changes in opium poppy cultivation are expected in Nimroz and in irrigated areas of Badghis provinces. Opium cultivation in major rain-fed areas in Badghis will depend on weather conditions during spring season. Ghor is expected to have an increase in opium cultivation. The level of opium cultivation in Ghor province is insignificant and may achieve poppy-free status in 2013 if timely effective eradication implemented. A decrease in opium cultivation is expected in Hirat province.
- **Central region:** No major changes are expected in Kabul province, the only poppy-cultivation provinces in this region. Given the very low level of opium cultivation, the entire region could become poppy-free if cultivation in Surobi district of Kabul province could be substantially reduced.
- **Eastern region:** Opium cultivation in Eastern region is likely to increase although cultivation levels in Laghman and Kapisa provinces will remain low. Opium cultivation in Nangarhar province is expected to increase. Nuristan will probably remain poppy-free in 2013. No major changes in opium cultivation are expected in Kunar and Laghman provinces, while increases are expected in Kapisa.
- **Northern region:** The number of opium cultivating provinces might increase in this region in 2013. The opium cultivation in Balkh and Faryab is expected to increase. These two provinces may lose its poppy-free status if timely effective eradication is not implemented. No major changes are expected in Baghlan province. The cultivation level in these three provinces would remain low compared to the main cultivating provinces.
- **North-eastern region:** An increase is expected in the opium cultivation in Badakhshan and Takhar provinces in 2013. The opium cultivation level in Badakhshan would remain moderate. Takhar may lose its poppy free status unless timely effective eradication is implemented.

1.1. DRIVING FORCES BEHIND OPIUM CULTIVATION TRENDS

During the 2013 ORAS phases 1 and 2, 546 village headmen from poppy growing and non-poppy growing villages were asked to state the main reason why farmers chose to cultivate opium instead of other crops or not to cultivate it at all.

Reasons for opium cultivation in 2013

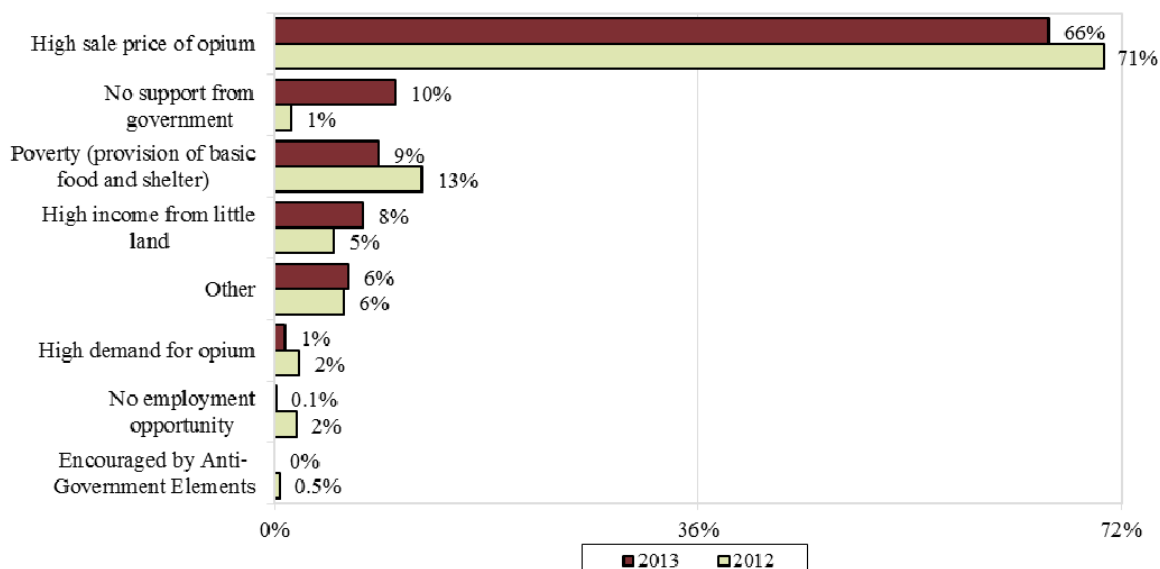
“High sales price of opium” was the predominant reason (66%) given for growing opium (71% in 2012). Indeed, opium prices, albeit lower than in 2010 and 2011, were still at a much higher level than between 2005 and 2009 making opium cultivation financially very attractive for farmers. 10% respondent mentioned the lack of government support and slightly fewer cited ‘poverty’ and ‘high income from little land’ as the most dominant reason.

Reasons for not cultivating opium in 2013

The ORAS does not allow to estimate whether more or less farmers grow poppy in 2013 compared to 2012. Still, among those farmers who reported not to cultivate opium in 2013, a higher awareness of eradication was noted. In 2012, 9,672 ha of poppy were eradicated, two and a half times the amount of 2011. In the 2013 assessment, ‘fear of eradication’ was the most frequent reason given for not growing poppy (46%) in the Southern and Western regions where indeed two third of poppy eradication took place in 2012. The large increase in eradication in 2012 compared to previous years and the fact that it happened in major poppy cultivating areas is a likely reason for the high proportion of responses mentioning eradication. By comparison, in the 2012 risk assessment, only 2% of respondents mentioned ‘fear of eradication’. The other rule of law related response, the more abstract ‘banned by the

government’, which was the most frequently given response in the 2012 risk assessment, was mentioned much less often in 2013. It seems that in 2013 a higher proportion of respondents thought of law enforcement or rule of law in terms of eradication rather than abstracts government bans. Other reasons such as ‘against Islam and ‘Elders and Shura decision’ did not change much between 2012 and 2013.

Figure 1 Reasons for opium cultivation in 2013 in opium growing villages (n=320)



The predominant reason in northern and north-eastern region given by 42% and 35% of respondents respectively for not growing poppy was ‘Not enough yield’ and ‘banned by the Government’ (4% and 17% in 2012).

Figure 2 Reasons for not cultivating opium in 2013 (n=188)

(Southern, Western, Eastern and Central regions)

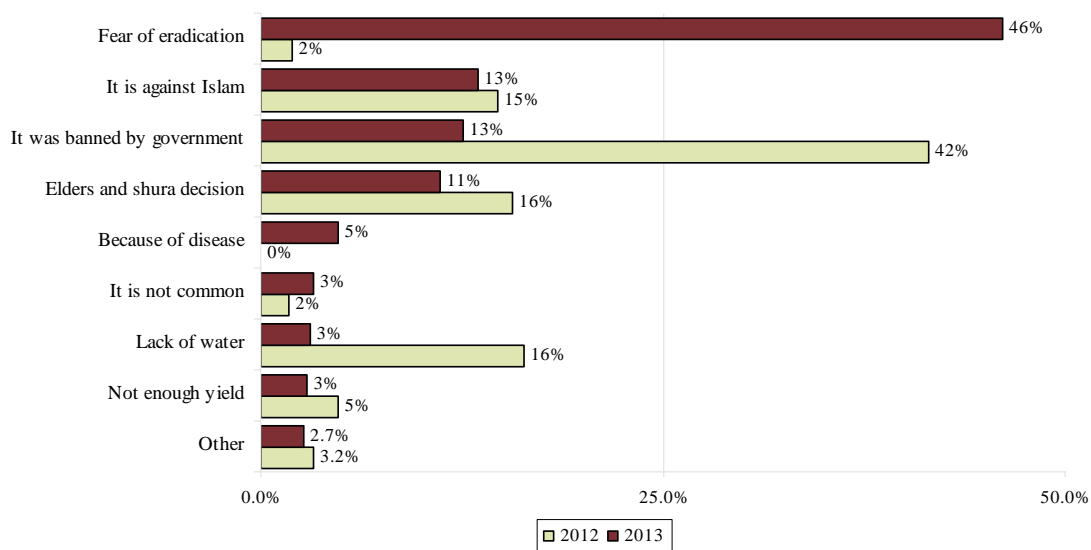
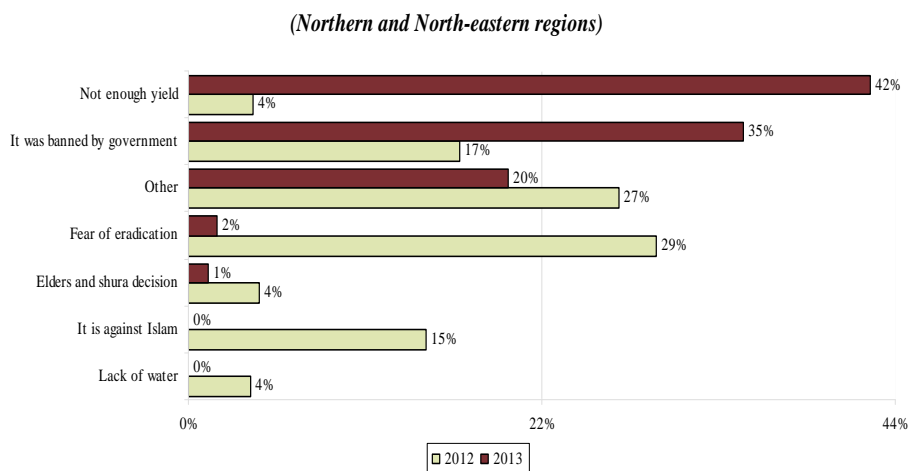


Figure 3 Reasons for not cultivating opium in 2013 (n=24)

1.2. CASH ADVANCES RECEIVED FOR OPIUM CULTIVATION

In the ORAS 2013 debriefing with surveyors in the Southern and Western regions indicated that traders made advance payments to farmers to grow opium. The traders seemed to further assure the farmers that in case their poppy crop was eradicated or the crop failed, repayment of the advance could be postponed until the next opium season. The increase in opium poppy cultivation reported in Southern and Western regions may be due to farmers trying to compensate the low opium yields of 2012 and the subsequent inability to pay for advance payments received from traders. In the Northern and North-eastern region advance payments were not reported.

1.3. AGRICULTURAL ASSISTANCE

Among the surveyed villages, only 37% received agricultural assistance in the preceding year in the form of seed, fertilizers and irrigation facilities. 63% reported not having received such assistance.

By comparison, 66% (40% of total villages surveyed) villages, which cultivated opium in 2013, had not received agricultural assistance in 2012. This indicates that the provision of agricultural assistance could have a positive effect on the decision to grow or not to grow opium. On the other hand, about 34% (21% of total villages surveyed) of all villages surveyed had received agricultural assistance and still continued to grow opium pointing to the existence of other factors.

Reflecting these inconclusive results and in contrast to previous years, the association between lack of agricultural assistance and poppy cultivation was not statistically significant¹ in the sample of villages surveyed although the existence of agricultural programmes e.g. in central Hilmand seemed to have led to comparatively low and possibly declining levels of poppy cultivation (see also chapter 2.2 under Hilmand province) in some areas.

¹ A statistically significant association would be assumed if the significance of the Pearson Chi-square test of independence was below 0.05.

Table 3: Agricultural assistance vis-à-vis expected opium cultivation in 2013 (n=533)

Agricultural assistance received	Opium cultivation in 2013		Total
	No	Yes	
No	23%	40%	63%
Yes	16%	21%	37%
Total	39%	61%	100%

1.4. FIELD SECURITY DURING ORAS IMPLEMENTATION

The statistical association between poor security and poppy cultivation was even stronger than in the case of agriculture assistance. Almost all villages with very poor security and most villages with poor security were cultivating poppy. In other words, villages in insecure areas had a high probability of cultivating poppy, and villages in areas with good security were less likely to have poppy cultivation.

Security was of general concern in most areas in the southern region (Hilmand, Kandahar and Uruzgan). In the Western region Badghis, Nimroz and Farah provinces also reported poor security conditions. Similarly poor security situation in provinces like Nangarhar, Kunar, Laghman and Kapisa in the Eastern region and Kabul in Central region and Chimtal district of Balkh province and Puli-Hisar district of Baghlan province in Northern region was associated with opium poppy cultivation.

Table 4: Security situation vis-à-vis expected opium cultivation in 2013 (n=533)

Poppy cultivation 2012	Village Security situation				Total
	Very good	Good	Poor	Very bad	
No	16%	18%	5%	0%	39%
Yes	6%	39%	13%	3%	61%
Total	23%	55%	19%	3%	100%

1.5. AWARENESS CAMPAIGN

Awareness campaigns to prevent opium cultivation was conducted in many areas of Afghanistan in October and November 2012. 77% of villages in the surveyed area were reached by awareness campaigns. Villages which had been covered by the campaign, were less likely to grow poppy than those which had not been reached by the campaign. Awareness campaigns seems to have had a positive influence on the decision not to grow opium.

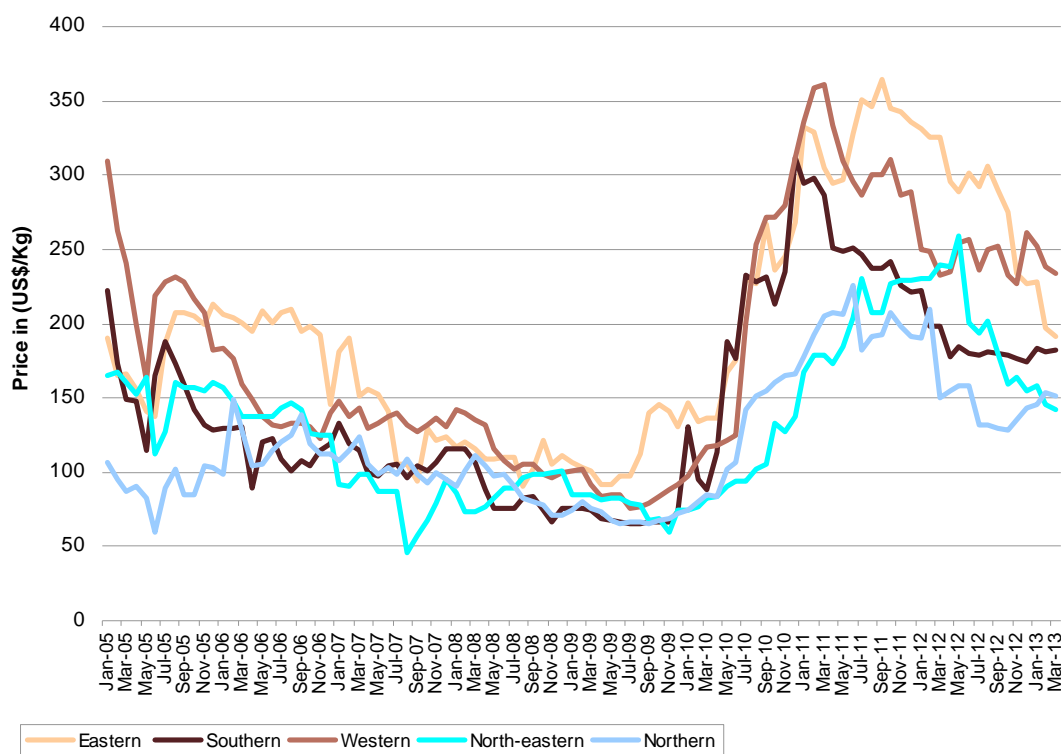
Table 5: Awareness campaign in 2012 vis-à-vis expected opium cultivation in 2013

Awareness campaign	No. of villages surveyed		Total
	No opium poppy cultivation in 2013	Opium poppy cultivation in 2013	
No	7%	16%	23%
Yes	33%	44%	77%
Total	40%	60%	100%

1.6. PRICES

The overview of opium prices is based on monthly Opium Price Report for Afghanistan, March 2013.

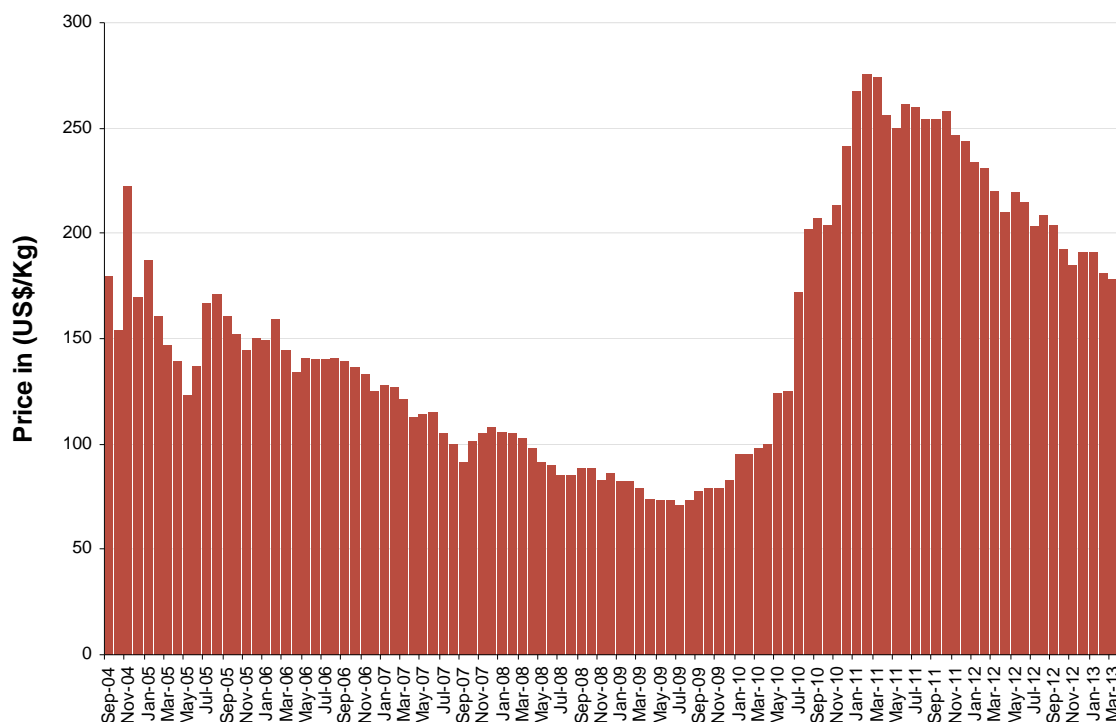
Figure 4 Regional average price of dry opium collected from traders January 2005 – March 2013



Source: MCN/UNODC Monthly Opium Price Report for Afghanistan, March 2013

Opium prices showed a decreasing trend in 2012 in some regions but remained relatively stable at a high level in the Southern and Western regions compared to the years before 2010. In that year, a dramatic increase in the prices was observed after blight appeared in poppy fields halving the 2010 opium production. Price increases similar to 2010 were not observed in 2012 although opium production was severely affected by a combination of adverse weather conditions and plant diseases leading to lower than average yields.

Figure 5 Average farm-gate prices for dry opium, September 2004 – March 2013



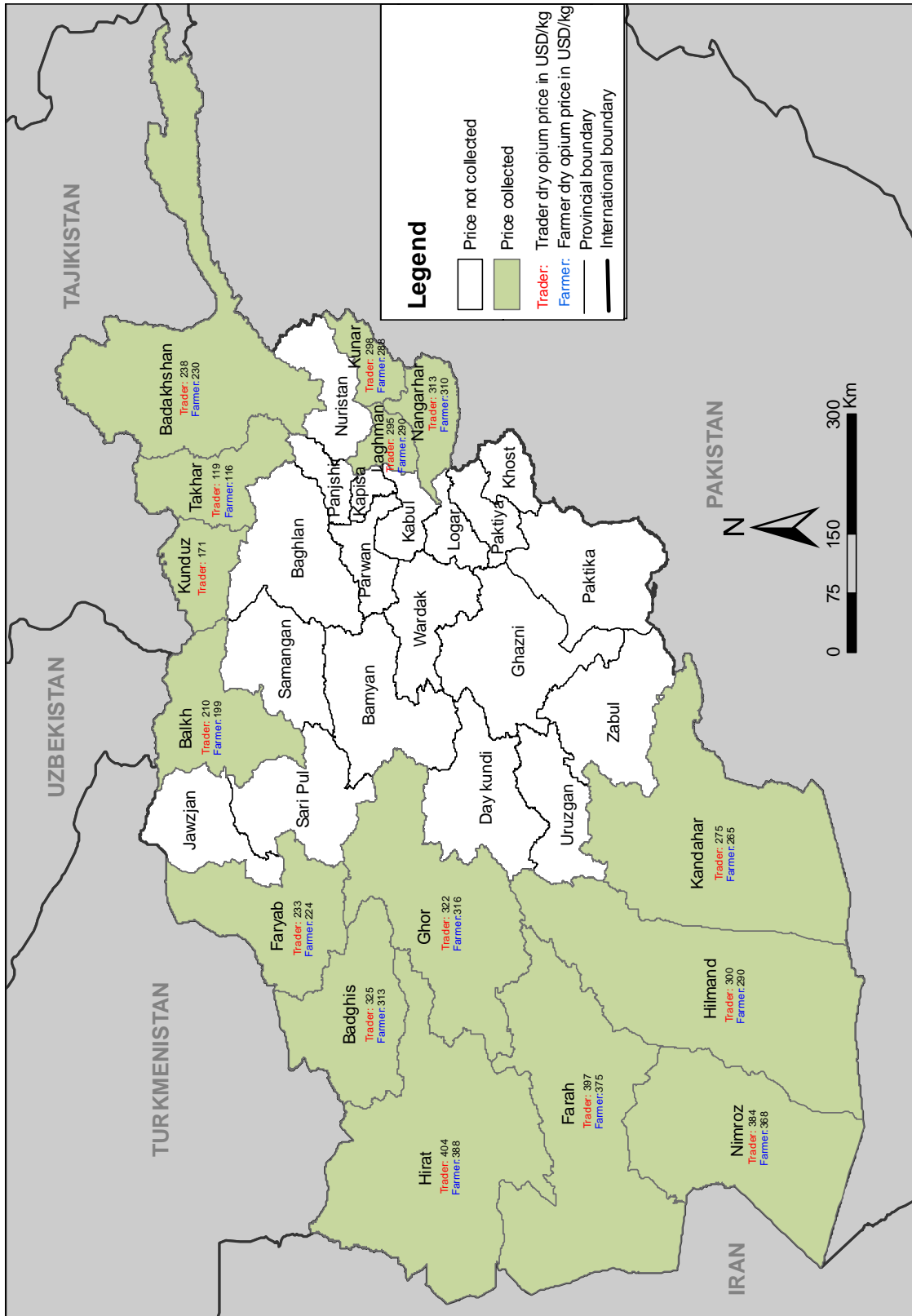
Source: MCN/UNODC Monthly Opium Price Report for Afghanistan, March 2013

Table 6: Village level prices of dry opium and food grains in 2012 and 2013 at the time of ORAS (US\$/kg)

Crop name	Prices (US\$ per Kg)		% difference
	ORAS 2012	ORAS 2013	
Dry opium	248	203	-18%
Fresh opium	181	160	-11%
Wheat	0.44	0.41	-7%
Rice	1.14	1.25	9%
Maize	0.34	0.31	-9%

Source: ORAS 2012 and 2013.

Map 4 Dry opium prices March 2013 (US\$/kg)



Source: Government of Afghanistan - National monitoring system implemented by MCN / 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.

2 FINDINGS BY PROVINCE

2.1 NORTH-EASTERN REGION

BADAKHSHAN PROVINCE

Opium poppy cultivation in Badakhshan province in 2013 is expected to increase but the level of cultivation will remain moderate. In 2012, opium cultivation in Badakhshan increased by 13%. The main opium poppy growing districts are Darayim, Argu, Jurm, Tashkan and Baharak

Opium cultivation details:

Cultivation in 2012 (hectares)	1,784
Cultivation practices	Irrigated and rain-fed
Projected trends in 2013	Increase
Projected cultivation level in 2013	Moderate
Planting time	Autumn or spring (depending on the altitude)
Expected main harvest time	Late June and early July
Security situation	Good

TAKHAR PROVINCE

The opium cultivation status is expected to increase. The province may lose its poppy-free status in 2013 unless timely eradication is implemented. The main poppy growing district is Qaisar.

Opium cultivation details:

Cultivation in 2012	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2013	Increase
Projected cultivation level in 2013	Insignificant (may lose poppy-free status)
Planting time	Autumn or spring (depending on the altitude)
Expected main harvest time	Late may and early June
Security situation	Good

KUNDUZ PROVINCE

Respondents across all districts reported no change in opium cultivation in 2013 and the province is likely to remain poppy-free.

Opium cultivation details:

Cultivation in 2012	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2013	Poppy-free
Projected cultivation level in 2013	Poppy-free
Planting time	Autumn
Expected main harvest time	Early May
Security situation	Good (poor in a few places)

2.2 NORTHERN REGION

BAGHLAN PROVINCE

No major changes are expected in opium cultivation in Baghlan province in 2013. In 2011 and 2012, Baghlan province lost its poppy-free status. The main poppy cultivated districts are Puli-Hisar, Andrab and Dihsala

Opium cultivation details:

Cultivation in 2012 (hectares)	177
Cultivation practices	Irrigated and rain-fed
Projected trends in 2013	No major change
Projected cultivation level in 2013	Insignificant
Planting time	Autumn/spring
Expected main harvest time	Late May and early June
Security situation	Good (poor in a few places)

BAMYAN PROVINCE

Bamyan province is expected to remain poppy-free in 2013.

Opium cultivation details:

Cultivation in 2012	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2013	Poppy-free
Projected cultivation level in 2013	Poppy-free
Planting time	Spring
Expected main harvest time	Late July
Security situation	Very Good

BALKH PROVINCE

Opium cultivation in Balkh province is expected to increase in 2013. The province may lose its poppy-free status unless effective eradication is implemented in time. Opium cultivation in Balkh is mainly confined to Chimtal district.

Opium cultivation details:

Cultivation in 2012	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2013	Increase
Projected cultivation level in 2013	Insignificant (may not remain poppy-free)
Planting time	Autumn
Expected main harvest time	Late April and early May
Security situation	Good (Poor in a few places)

FARYAB PROVINCE

Faryab became poppy-free in 2010 from 291 ha opium cultivation in 2008. In 2011 the province lost its poppy-free status and regained it in 2012. It is expected that there will be no major change in opium cultivation in 2012. The province could remain poppy-free if there is effective eradication.

Opium cultivation details:

Cultivation in 2012	Poppy free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2013	Increase
Projected cultivation level in 2013	Insignificant (may loose poppy-free status)
Planting time	Autumn
Expected main harvest time	May
Security situation	Good (poor in a few places)

JAWZJAN PROVINCE

Jawzjan province was not a significant opium poppy-growing area until 2002. From 2002 to 2006, however, cultivation increased sharply. Since 2010 the province was poppy-free, and it is expected to remain poppy-free in 2013 as well.

Opium cultivation details:

Cultivation in 2012	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2013	Poppy-free
Projected cultivation level in 2013	Poppy-free
Planting time	Autumn and spring
Expected main harvest time	May
Security situation	Good

SAMANGAN PROVINCE

Samangan province was poppy-free since 2007. The province is expected to remain poppy-free in 2013.

Opium cultivation details:

Cultivation in 2012	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2013	Poppy-free
Projected cultivation level in 2013	Poppy-free
Planting time	Spring
Expected main harvest time	Late June and early July
Security situation	Very Good

SARI PUL PROVINCE

Sari Pul province was poppy-free since 2010. In 2013, it is expected to remain poppy-free.

Opium cultivation details:

Cultivation in 2012	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2013	Poppy-free
Projected cultivation level in 2013	Poppy-free
Planting time	Spring
Expected main harvest time	Late June and early July
Security situation	Good

2.3 EASTERN REGION

NANGARHAR PROVINCE

There could be an increase in opium cultivation in Nangarhar province in 2013, but the cultivation level will probably remain moderate. The main opium poppy growing districts are Khogyani, Sherzad, Achin Pachir-Wagam and Lalpur. In 2013, opium cultivation expanded into Chaparhar, Deh-Bala, Kot, Goshta, Nazyan and Surkh Rud districts.

Opium cultivation details:

Cultivation in 2012 (hectares)	3,151
Cultivation practices	Irrigated
Projected trends in 2013	Increase
Projected cultivation level in 2013	Moderate
Planting time	Autumn
Expected main harvest time	Mid-April/ Early May
Security situation	Poor

KUNAR PROVINCE

No major change is expected in opium cultivation in 2013 and the level of opium cultivation will probably remain moderate in Kunar. The main opium poppy growing districts in Kunar are Dara-i-pech, Shigal wa sheltan, Watapoor, Dangam, Chapa dara and Sawkai. During the debriefing, surveyors mentioned that they had heard of poppy cultivation bans reportedly announced by the Taliban in some areas of the province.

Opium cultivation details:

Cultivation in 2012 (hectares)	1,279
Cultivation practices	Irrigated and rain-fed
Projected trends in 2013	No major change
Projected cultivation level in 2013	Moderate
Planting time	Autumn
Expected main harvest time	Mid-April/ early May
Security situation	Poor

LAGHMAN PROVINCE

No major change is expected in opium cultivation in 2013 in Laghman province and the level of opium cultivation will probably remain low. In 2012, Alingar, Alisheng, Dawlat Shah and Mihtarlam were the main opium poppy-growing districts.

Opium cultivation details:

Cultivation in 2012 (hectares)	877
Cultivation practices	Irrigated and rain-fed
Projected trends in 2013	No major change
Projected cultivation level in 2013	Low
Planting time	Autumn
Expected main harvest time	Mid-April/ Early May
Security situation	Poor

NURISTAN PROVINCE

Nuristan is located at a high elevations and is expected to remain poppy-free in 2013.

Opium cultivation details:

Cultivation in 2012	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2013	Poppy-free
Projected cultivation level in 2013	Nil
Security situation	Poor

KAPISA PROVINCE

Increases in opium cultivation are expected in 2013. This province has lost its poppy-free status in 2011 and was not poppy-free 2012. The level of cultivation will probably remain insignificant. The main opium poppy growing districts are Tagab and Alasai.

Opium cultivation details:

Cultivation in 2012 (hectares)	290
Cultivation practices	Irrigated
Projected trends in 2013	No major change
Projected cultivation level in 2013	Insignificant
Planting time	Autumn/spring
Expected main harvest time	Late May
Security situation	Poor

2.1 CENTRAL REGION

GHAZNI PROVINCE

Ghazni province has been poppy-free since 2005. ORAS results suggest that the province will remain so in 2013.

Opium cultivation details:

Cultivation in 2012	Poppy-free
Cultivation practices	Irrigated
Projected trends in 2013	Poppy-free
Projected cultivation level in 2013	Nil
Security situation	Very poor

KHOST PROVINCE

Khost province has been poppy-free since 2007 and it is expected to remain so in 2013.

Opium cultivation details:

Cultivation in 2012	Poppy-free
Cultivation practices	Irrigated
Projected trends in 2013	Poppy-free
Projected cultivation level in 2013	Nil
Security situation	Poor

LOGAR PROVINCE

Logar province has been poppy-free since 2005 and it is expected to remain so in 2013.

Opium cultivation details:

Cultivation in 2012	Poppy-free
Cultivation practices	Irrigated
Projected trends in 2013	Poppy-free
Projected cultivation level in 2013	Nil
Security situation	Poor

PAKTIKA PROVINCE

Paktika province has been poppy-free since 2004 and is expected to remain so in 2013.

Opium cultivation details:

Cultivation in 2012	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2013	Poppy-free
Projected cultivation level in 2013	Nil
Security situation	Poor

PAKTYA PROVINCE

Paktya province has been poppy-free since 2005 and the same trend is expected to continue in 2013.

Opium cultivation details:

Cultivation in 2012	Poppy-free
Cultivation practices	Irrigated
Projected trends in 2013	Poppy-free
Projected cultivation level in 2013	Nil
Security situation	Poor

PARWAN PROVINCE

Parwan has been poppy-free since 2007 and it is expected to stay poppy-free in 2013.

Opium cultivation details:

Cultivation in 2012	Poppy-free
Cultivation practices	Irrigate
Projected trends in 2013	Poppy-free
Projected cultivation level in 2013	Nil
Security situation	Good

PANJSHIR PROVINCE

Panjshir province has been poppy-free for many years and it is expected to maintain the same status in 2013.

Opium cultivation details:

Cultivation in 2012	Poppy-free
Cultivation practices	Irrigated
Projected trends in 2013	Poppy-free
Projected cultivation level in 2013	Nil
Security situation	Very good

WARDAK PROVINCE

Wardak has been poppy-free since 2006 and it is expected to remain so in 2013.

Opium cultivation details:

Cultivation in 2012	Poppy-free
Cultivation practices	Irrigated
Projected trends in 2013	Poppy-free
Projected cultivation level in 2013	Nil
Security situation	Very poor

KABUL PROVINCE

No major change in opium cultivation is expected in Kabul in 2013. Opium cultivation in Kabul is mainly confined to Uzbeen valley in Surobi district where the security situation is of concern.

Opium cultivation details:

Cultivation in 2012 (hectares)	120
Cultivation practices	Irrigated
Projected trends in 2013	No major change
Projected cultivation level in 2013	Low
Planting time	Autumn
Expected main harvest time	Late May
Security situation	Generally very good but very poor in Surobi district

2.2 SOUTHERN REGION

KANDAHAR PROVINCE

In 2012, there was decrease in opium cultivation in Kandahar province by 11% compared to 2011. In 2013, however, poppy cultivation is expected to increase in the province and the cultivation level will remain high. The main opium cultivation districts in 2012 were Ghorak, Khakrez, Maywand, Nesh, Panjwayee and Zhire.

Opium cultivation details:

Cultivation in 2012 (hectares)	24,341
Cultivation practices	Irrigated
Projected trends in 2013	Increase
Projected cultivation level in 2013	High
Planting time	Autumn
Expected main harvest time	End of April/Beginning of May
Security situation	Very poor

HILMAND PROVINCE

Opium cultivation is expected to increase in Hilmand in 2013. The area under opium cultivation increased in 2012 to 75,176 ha compared to 63,307 ha in 2011. In 2013, the cultivation level is expected to remain very high. The main opium cultivation districts in 2012 were Baghran, Kajaki, Musa Qala, Nad Ali, Naher-i-Saraj, Nowzad, and Washer. In 2012, there was significant increase of opium cultivation in north of the Boghra canal. In 2013, further increases in poppy cultivation are expected in that area. In central Hilmand, where the level of poppy cultivation is much lower than in the rest of the province, poppy cultivation is expected to decrease.

Opium cultivation details:

Cultivation in 2012 (hectares)	75,176
Cultivation practices	Irrigated
Projected trends in 2013	Increase
Projected cultivation level in 2013	Very high
Planting time	Autumn
Expected main harvest time	Late April/Beginning of May
Security situation	Very poor

URUZGAN PROVINCE

Uruzgan is one of Afghanistan's major opium poppy-growing provinces. Opium cultivation remained almost stable in 2012 compared to 2011. In 2013, cultivation is expected to increase. The main opium cultivation districts in 2012 were Dehrawud, Shahidi Hassas and Tirinkot (Provincial Centre). The increase in cultivation is expected mainly in Dehrawud, Chora and Shahidi Hassas districts.

Opium cultivation details:

Cultivation in 2012 (hectares)	10,508
Cultivation practices	Irrigated
Projected trends in 2013	Increase
Projected cultivation level in 2013	High
Planting time	Autumn
Expected main harvest time	Mid-May
Security situation	Very poor

ZABUL PROVINCE

In 2012, there was an increase by 62% in opium cultivation in Zabul province compared to 2011. In 2013, further increases in opium cultivation are expected. The main poppy growing districts in 2012 were Mizan and Arghandab. Despite the expected increase, the level of poppy cultivation will probably remain low.

Opium cultivation details:

Cultivation in 2012 (hectares)	424
Cultivation practices	Irrigated
Projected trends in 2012	Increase
Projected cultivation level in 2013	Low
Planting time	Autumn
Expected main harvest time	Mid-May
Security situation	Very poor

DAYKUNDI PROVINCE

In 2012, The opium cultivation remained stable compared to 2011. No major change is expected in 2013. The main opium poppy growing districts in 2012 were Gizab and Kijran.

Opium cultivation details:

Cultivation in 2012 (hectares)	1,058
Cultivation practices	Irrigated
Projected trends in 2013	No major change
Projected cultivation level in 2013	Moderate
Planting time	Spring
Expected main harvest time	July
Security situation	Good (poor in two districts)

2.3 WESTERN REGION**HIRAT PROVINCE**

In 2012, the poppy cultivation increased by 195% compared to 2011. However, a decrease is expected in 2013. The level of opium cultivation is likely to remain low in 2013. The only opium cultivation district in Hirat province is Shindand. The province can achieve poppy-free status with effective eradication efforts.

Opium cultivation details:

Cultivation in 2012 (hectares)	1,080
Cultivation practices	Irrigated
Projected trends in 2013	Decrease
Projected cultivation level in 2013	Low
Planting time	Autumn/spring
Expected main harvest time	Late April/early May
Security situation	Good (poor at few places)

FARAH PROVINCE

Farah became the second largest opium cultivating province in the country in 2012 with an increase by 58% over 2011, relegating Kandahar to third place. In 2013, opium cultivation is expected to increase further and the cultivation level will remain high in the province. Opium cultivation is expected to increase in all districts which were already growing opium in 2012. An increase in the number of bore wells to irrigate the poppy fields is reported in Bakwah district. Reportedly, this development is partly driven by farmers who left central Hilmand and migrated to Bakwah district in Farah province to resume opium cultivation in new areas where they perceive the risk of eradication to be lower.

Opium cultivation details:

Cultivation in 2012 (hectares)	27,733
Cultivation practices	Irrigated
Projected trends in 2013	Increase
Projected cultivation level in 2013	High
Planting time	Autumn
Expected main harvest time	Early May
Security situation	Poor

NIMROZ PROVINCE

In 2012, there was a significant increase by 53% in opium cultivation compared to 2011. In 2013, no major change in opium cultivation is expected in the main opium growing district of Khash Rod. The level of cultivation in the province is expected to remain moderate.

Opium cultivation details:

Cultivation in 2012 (hectares)	3,808
Cultivation practices	Irrigated
Projected trends in 2013	No major change
Projected cultivation level in 2013	Moderate
Planting time	Autumn
Expected main harvest time	Mid-April
Security situation	Poor

GHOR PROVINCE

Ghor province lost its poppy-free status in 2012. In 2013, a further increase in opium cultivation is expected. Despite this, the level of cultivation will probably remain insignificant. Ghor province may regain poppy-free status in 2013 if timely effective eradication is implemented.

Opium cultivation details:

Cultivation in 2012 (hectares)	125
Cultivation practices	Irrigated and rain-fed
Projected trends in 2013	Increase
Projected cultivation level in 2013	Insignificant
Planting time	Spring
Expected main harvest time	Late June
Security situation	Poor

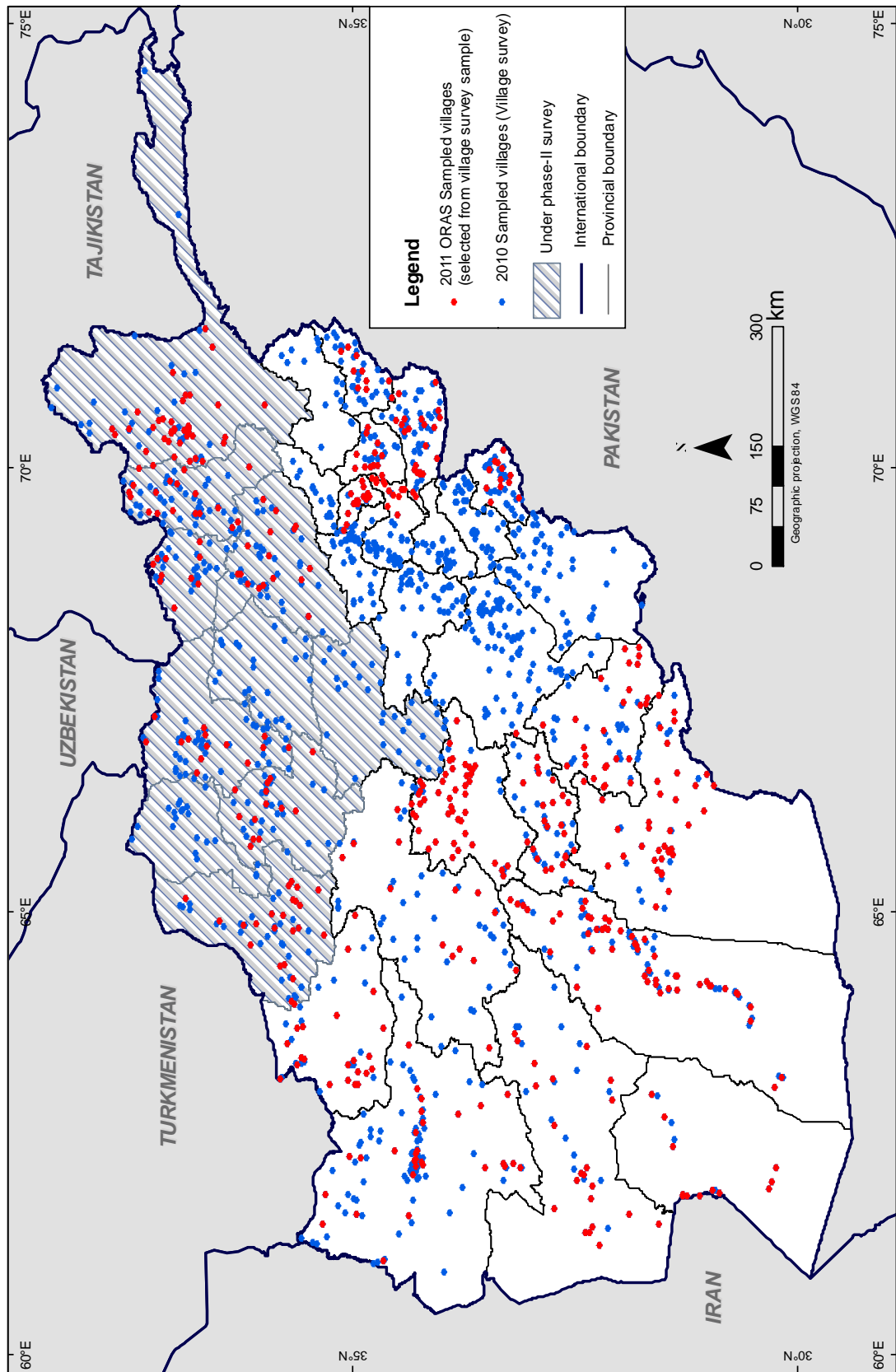
BADGHIS PROVINCE

In 2012, there was an increase by 19% in opium cultivation over 2011. In 2013, no major changes in opium cultivation are expected. The cultivation level is expected to remain moderate. The main poppy growing districts are Bala Murghab and Ghormach. Opium cultivation in rain-fed areas in Badghis will depend on weather conditions during the spring season and could not be determined at time of the survey.

Opium cultivation details:

Cultivation in 2010 (hectares)	2,363
Cultivation practices	Irrigated and rain-fed
Projected trends in 2011	No major change
Projected cultivation level in 2013	Moderate
Planting time	Spring
Expected main harvest time	Mid-June
Security situation	Good (poor in two district)

Map 5 Sampling frame and selected villages for the Winter Assessment 2013 (Phase 1 and 2)



Note: The villages surveyed for the Winter Assessment 2012 are a subsample of the villages surveyed during the 2012 Opium Survey.

3 METHODOLOGY

The Opium Risk Assessment in 2013 was divided into two phases. In the first phase, the Southern, Western, Eastern and Central regions were surveyed. The Northern and North-eastern regions will be surveyed in the second phase of ORAS.

The first phase of the Opium Risk Assessment including training and deployment was conducted from 25 November 2012 to 2 January 2013 by 49 local field surveyors. The survey was jointly planned by the Ministry of Counter-Narcotics (MCN) of the Government of Afghanistan and UNODC and implemented by the Ministry.

The second phase of the Winter Opium Risk Assessment including training and deployment was conducted from 5 February 2012 to 15 March 2013 by 11 local field surveyors. The survey was jointly planned and implemented by the Ministry of Counter-Narcotics (MCN) of the Government of Afghanistan and UNODC.

The sampling size and design were similar to 2012. The sampling frame included all areas which were regarded to be at risk of opium cultivation. Special monitoring cells were deployed in the regions to supervise the surveyors in the fields. The questionnaires were modified and made more relevant to the required information. The debriefing of surveyors were carried out by a core team of MCN/UNODC in the respective regional offices.

Sampling frame

For the 2013 ORAS, four strata were defined:

1) Poppy risk area covers whole province (11 provinces)

Sample for ORAS was a sub-sample of the village surveyed in 2012, whereby half the sample was drawn from villages having reported opium cultivation in 2012 and half from non-growing villages using systematic random sampling. The provinces covered under this sample are Hilmand, Uruzgan, Kandahar, Zabul, Daikundi, Farah, Nimroz, Badghis, Kunar, Laghman and Ghor.

2) Poppy risk only in target areas within province (5 provinces)

In provinces where opium cultivation in 2012 was confined to certain areas (so-called target areas in the 2012 survey), a completely new sample of villages was drawn randomly from the village frame for the ORAS 2013 as the number of villages covered by the 2012 opium survey was too low to select a sufficiently high number of villages for the ORAS. The provinces covered under this sample are Nangarhar, Badakhshan, Baghlan, Kapisa and Herat,

3) Poppy risk low or confined to small and/or difficult to access areas (6 provinces)

In provinces where opium areas were too small, too dispersed or difficult to access, no sample was drawn. Instead, surveyors visited villages and gathered information on the opium cultivation trends along observation routes and in specific areas of interest. The provinces selected under this category are Kabul, Balkh, Saripul, Jawzjan, Faryab and Takhar

4) Outside risk area (12 provinces)

Some provinces, which have been poppy-free for a longer period of time and where no resumption of opium cultivation was expected in 2013, were excluded from the frame: Logar, Paktiya, Paktika, Panjshir, Ghazni, Wardak, Parwan and Nuristan.

In the ORAS 2013, 5473 villages were selected from strata 1 and 2. Out of the selected villages, only 533 villages could be surveyed. The remaining villages could not be surveyed mainly because of security reasons.

Limitations:

The ORAS is designed to assess cultivation trends and not for calculating quantitative area estimates. In addition to the sample villages, the surveyors, using their knowledge of the local situation, visited other areas in the province to complement their assessment both of opium cultivation trends and the security situation throughout the province. The trend assessment for each province is thus a combination and triangulation of information gathered systematically and through unsystematic observation. It is based as much on experience and the personal judgement of field surveyors and analysts as on statistical analysis. While this is a limitation as it is difficult to determine how reliable the established trend is, the survey design allows to assess opium cultivation at a very early point in time when quantitative, systematic approaches do not yet work.

Training of surveyors and data collection

The surveyors were selected on the basis of a written test, their experience in conducting opium poppy surveys as well as knowledge of local customs and their acceptance by local communities. During the training period, the MCN/UNODC survey coordinators and 63 surveyors were trained in understanding the questionnaire and effective survey techniques.

The surveyors conducted structured interviews with the headmen of selected villages in provinces within the sampling frame. UNODC and MCN coordinators monitored data quality and the progress of the survey closely. Special monitoring cells consisting of survey coordinators and trusted supervisors were setup in all the three regions to control and monitor the survey activities in the field effectively.



ORAS field survey (headman interview) in Central region



ORAS training in the North-eastern region



ORAS training in the Eastern region



ORAS field survey (headman interview) in Central region

Debriefing

Similar to last year the debriefing exercise was carried out in the regions in the presence of all surveyors and survey coordinators involved in the field surveys in order to obtain accurate and first hand information about the opium cultivation trends. A core team of MCN and UNODC visited the regional offices and carried out the debriefing sessions in a structured and systematic manner.

In addition to the information obtained through village survey analysis the debriefing information was very helpful to understand the socio-political situation; difficulties encountered in conducting the survey; the level of control exercised by Governors over their respective provinces; the presence of anti-Government elements and the resulting impact on opium cultivation; corruption etc.

ANNEX 1: Cultivation levels from 2005 to 2012 and expected trends in 2013

PROVINCE	Cultivation 2005 (ha)	Cultivation 2006 (ha)	Cultivation 2007 (ha)	Cultivation 2008 (ha)	Cultivation 2009 (ha)	Cultivation 2010 (ha)	Cultivation 2011 (ha)	Cultivation 2012 (ha)	Change 2011-2012 (ha)	Change 2011-2012 (%)	Cultivation trend in 2013
Ghazni	9	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	NA	No major change
Kabul	Poppy-free	80	500	310	132	152	220	120	-100	-45%	No major change
Khost	2	133	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	NA	No major change
Logar	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	NA	No major change
Paktika	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	NA	No major change
Paktya	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	NA	No major change
Panjshir	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	NA	No major change
Parwan	Poppy-free	124	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	NA	No major change
Wardak	106	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	NA	No major change
Central Region	117	337	500	310	132	152	220	120	-100	-45%	
Kapisa	115	282	835	436	Poppy-free	Poppy-free	181	290	+109	+60%	Increase
Kunar	1,059	932	446	290	164	154	578	1,279	+701	+121%	No major change
Laghman	274	710	561	425	135	234	624	877	+253	+41%	No major change
Nangarhar	1,093	4,872	18,739	0	294	719	2,700	3,151	+451	+17%	Increase
Nuristan	1,554	1,516	0	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	NA	No major change
Eastern Region	4,095	8,312	20,581	1,151	593	1,107	4,082	5,596	1,514	37%	
Day Kundi	2,581	7,044	3,346	2,273	3,002	1,547	1,003	1,058	+55	+5%	No major change
Hilmand	26,500	69,324	102,770	103,590	69,833	65,045	63,307	75,176	+11869	+19%	Increase
Kandahar	12,989	12,619	16,615	14,623	19,811	25,835	27,213	24,341	-2872	-11%	Increase
Uruzgan	2,024	9,703	9,204	9,939	9224	7,337	10,620	10,508	-112	-1%	Increase
Zabul	2,053	3,210	1,611	2,335	1,144	483	262	424	+161	+62%	Increase
Southern Region	46,147	101,900	133,546	132,760	103,014	100,247	102,406	111,507	9,101	9%	
Badghis	2,967	3,205	4,219	587	5,411	2,958	1,990	2,363	+373	+19%	No major change
Farah	10,240	7,694	14,865	15,010	12,405	14,552	17,499	27,733	+10234	+58%	Increase
Ghor	2,689	4,679	1,503	Poppy-free	Poppy-free	Poppy-free	Poppy-free	125	+125	NA	Increase
Hirat	1,924	2,287	1,525	266	556	360	366	1,080	+714	+195%	Decrease
Nimroz	1,690	1,955	6,507	6,203	428	2,039	2,493	3,808	+1315	+53%	No major change
Western Region	19,510	19,820	28,619	22,066	18,800	19,909	22,348	35,109	12,761	57%	
Balkh	10,837	7,232	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	NA	Increase (May not be poppy-free)
Bamyan	126	17	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	NA	No major change
Faryab	2,665	3,040	2,866	291	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	NA	Increase (May not be poppy-free)
Jawzjan	1,748	2,024	1,085	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	NA	No major change
Samangan	3,874	1,960	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	NA	No major change
Sani Pul	3,227	2,252	260	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	NA	No major change
Baghlan	2,563	2,742	671	475	Poppy-free	Poppy-free	161	177	+16	+10%	No major change
Northern Region*	25,040	19,267	4,882	766	0	0	161	177	16	10%	
Badakhshan	7,370	13,056	3,642	200	557	1,100	1,705	1,927	+222	+13%	Increase
Kunduz	275	102	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	NA	No major change
Takhar	1,364	2,178	1,211	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	NA	Increase (May not be poppy-free)
North-eastern Region*	9,009	15,336	4,853	200	557	1,100	1,705	1,927	222	13%	
Total (rounded)	104,000	165,000	193,000	157,000	123,000	123,000	131,000	154,000	23,515	18%	

*Due to administrative boundary changes, the estimates for Farah and Nimroz from 2009 to 2012 were calculated considering parts of Khash Rod district, the main cultivating district in Nimroz, as being part of Farah province. The 2008 figures and before include all of Khash Rod district in Nimroz province.

A province is defined as poppy-free when it is estimated to have less than 100 ha of opium cultivation.



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