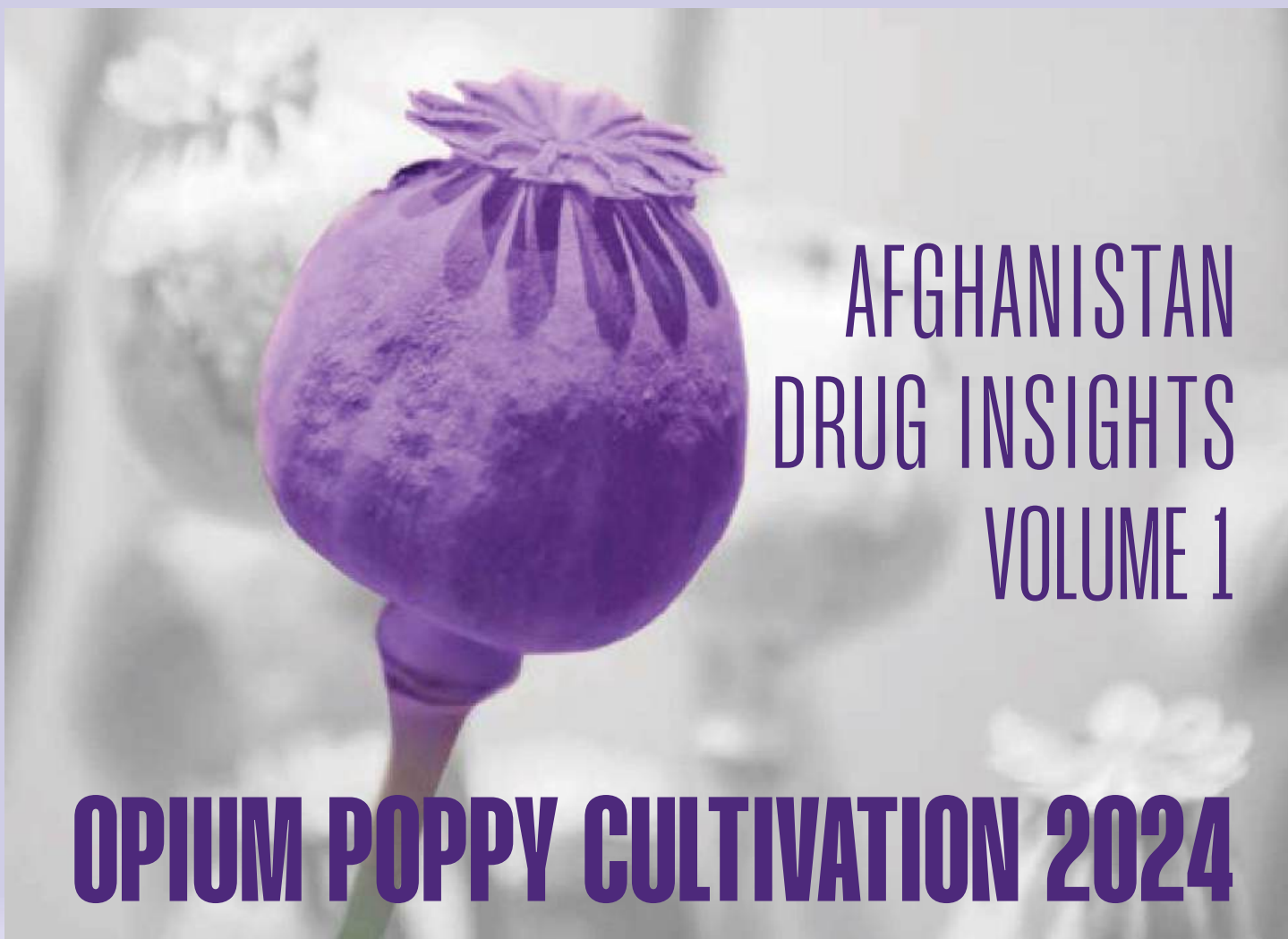




United Nations
Office on Drugs and Crime



UNODC INFORMATION CENTRE
For researching and analyzing transnational
threats related to drugs and crime



AFGHANISTAN DRUG INSIGHTS VOLUME 1

OPIUM POPPY CULTIVATION 2024

▼
VOLUME 1: OPIUM POPPY
CULTIVATION 2024

NOVEMBER 2024

Acknowledgements

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UNODC is grateful for the financial contribution of the United States of America to the Afghanistan Opium Survey.

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THE SERIES ON AFGHANISTAN DRUG INSIGHTS

The Afghanistan Drug Insights is a series of reports that provide latest data and in-depth analysis on aspects of the evolving drug situation in Afghanistan. This first volume provides the latest figures on national and provincial opium poppy cultivation in 2024 and recent opium price developments. The remaining reports in the series will cover a range of topics related to the drug situation in Afghanistan, including opium production and rural development; the socioeconomic situation of farmers after the drugs ban; drug trafficking and supply; and treatment availability and drug use.

Given the unprecedented nature of the ongoing drugs ban in Afghanistan, having continued for a second year, UNODC has sought to examine different aspects of the drug situation in that country. Taken together, reports in the series paint a comprehensive picture of the enforcement of the ban on production, trafficking and consumption of all drugs and delve deep into the impacts of the ban on the Afghan population, as well as on Afghanistan's neighbouring countries and the wider region.

The insights are aimed at informing efforts to address demand and supply of drugs within and outside Afghanistan in an objective and timely manner, using latest data at highest quality standards.

The present insight has been produced under the project "Monitoring of Opium Production in Afghanistan" (AFG/F98). Information and data contained in this report, unless otherwise stated, are based on data collected by UNODC through remote sensing techniques and rural village surveys; as well as through global data collections on drugs (UNODC Annual Report Questionnaires and UNODC Drugs Monitoring Platform). Data on opium cultivation and production are based on the Afghanistan Opium Surveys 1994-2020 jointly published by UNODC and the Government of Afghanistan, as well as the Afghanistan Opium Surveys conducted by UNODC in 2021, 2022, and 2023.



OPIUM CULTIVATION IN AFGHANISTAN 2024

POPPY CULTIVATION ESTIMATES AFTER THE SECOND YEAR OF THE ENFORCED BAN ON DRUGS

Afghanistan currently sits at a crossroads. The illegal drug economy has traditionally been an important source of income across many segments of society, especially many rural farming households that are especially vulnerable to economic shocks. However, starting with the 2023 crop season, the de-facto Authorities of Afghanistan enforced a ban that virtually eliminated poppy cultivation across much of the country, drastically reducing the potential income of farmers from that year's harvest.

Key points

Now entering its second year of enforcement, the ban continues to hold. In 2024, the area under cultivation was estimated at 12,800 ha, or 19% more than in 2023 (10,800 ha)¹. Despite the increase, opium poppy cultivation is still far below the pre-ban levels. In 2022 an estimated 232,000 ha were cultivated.²

The increase in cultivation came with a geographical shift. The South-western provinces of the country were long the center of cultivation up to and including 2023. In 2024, this changed and now 59% of all cultivation took place in the North-east, particularly in Badakhshan.

Following a major hike in 2022 and 2023, dry opium prices stabilized slightly in the first half of 2024 to around US\$730. These prices are several times higher than the long-running pre-ban average of US\$100 per kilogram.

Extremely high farmgate prices and questions about dwindling opium stocks may encourage a resumption in poppy cultivation, especially in places outside of traditional cultivation centers, including neighboring countries.

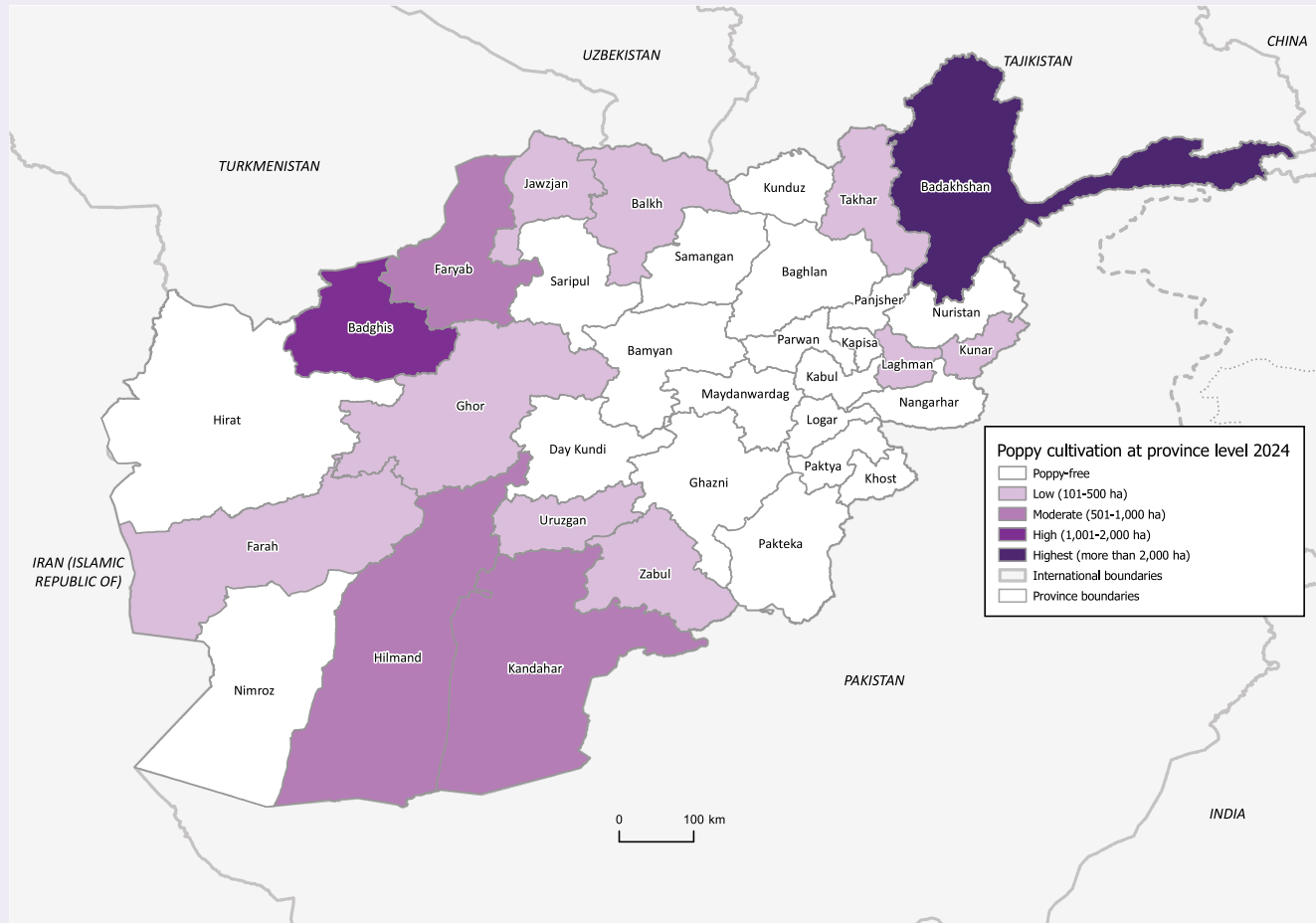
The rapid and currently sustained decline in poppy cultivation and opium production has important and wide-ranging implications for the country and opiate markets long supplied by product from Afghanistan. Questions remain as to how the country will cope with the continued reduction in opiate income and how opiate markets downstream will react.

Farmers that lack sustainable alternatives face a more precarious financial and economic situation and need alternative economic opportunities to become resilient against picking up poppy cultivation in the future. Distributors and dealers closer to destination markets, as well as consumers, are likely to experience supply constraints in the coming years, should the ban remain in place.

1 The DfA reported to UNODC eradication data 2024. According to the information provided, almost all eradication took place before the satellite imagery was taken, it is therefore accounted for in the cultivation estimates. UNODC did not verify the information provided by the DfA on hectares eradicated. More detailed information will be provided in the upcoming Insight on opium production.

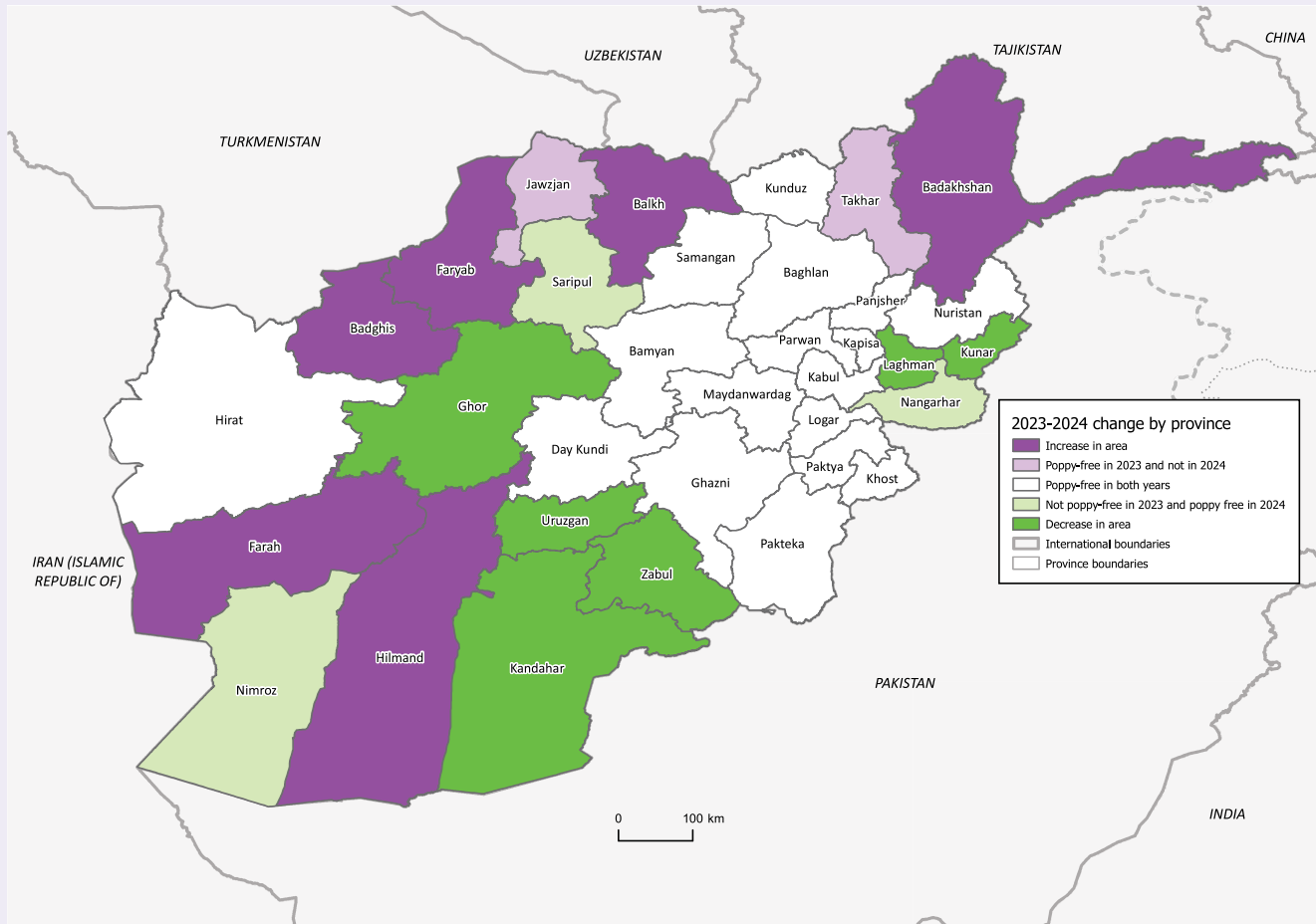
2 The methodology behind these estimates is available on <https://www.unodc.org/unodc/en/data-and-analysis/drug-cultivation-production-and-manufacture.html>.

Opium cultivation by province, 2024



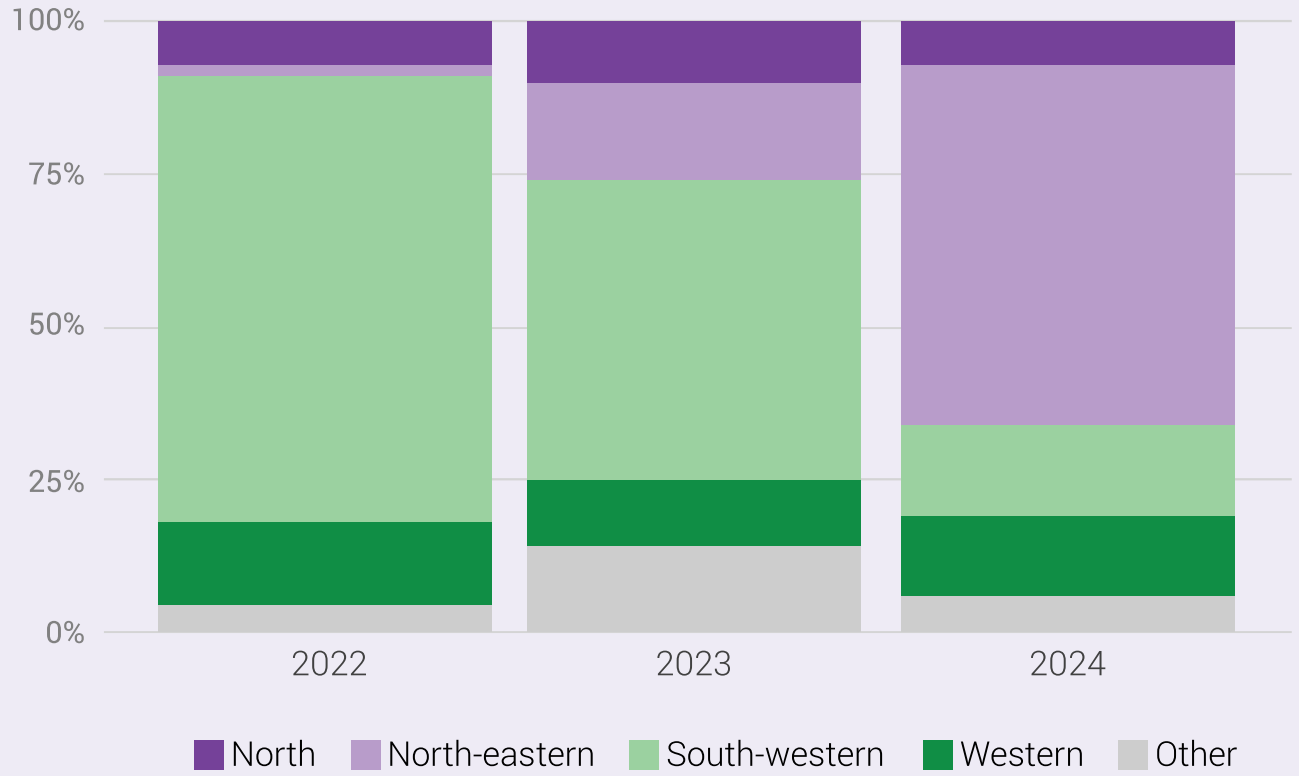
Note: The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations. Dotted line represents approximately the Line of Control in Jammu and Kashmir agreed upon by India and Pakistan. The final status of Jammu and Kashmir has not yet been agreed upon by the parties.

Change in opium cultivation by province, 2023-2024

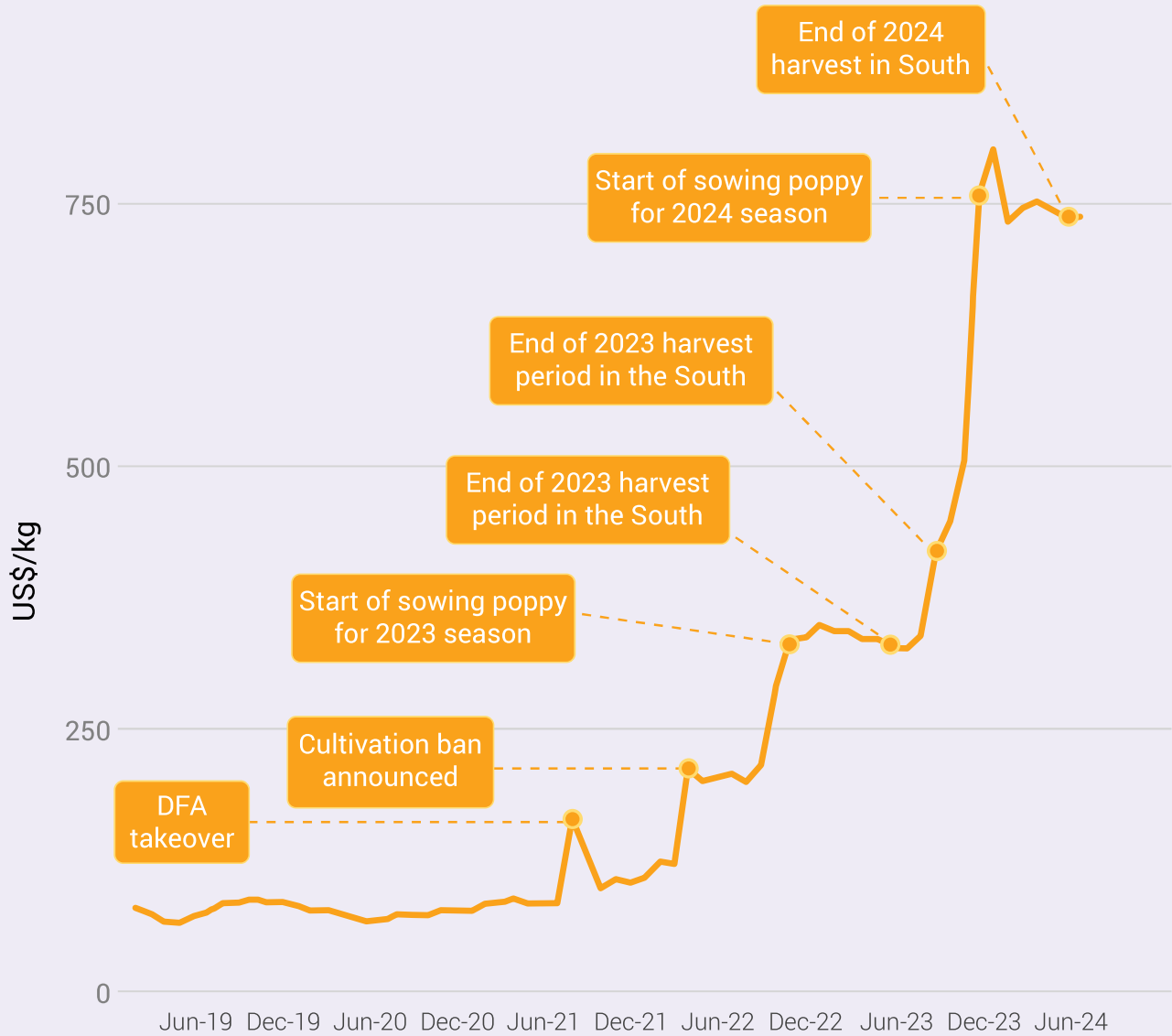


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Regional distribution of opium cultivation, 2022-2024



Monthly national average dry opium prices 2019 - 2024



Opium cultivation by province and region, 2021-2024

PROVINCE	Cultivation 2021 (ha)	Cultivation 2022 (ha)	Cultivation 2023 (ha)	Cultivation 2024 (ha)	Change 2023-2024 (%)
Bamyan	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Day Kundi	792	837	Poppy-free	Poppy-free	No change
Kabul	216	216	Poppy-free	Poppy-free	No change
Kapisa	216	184	Poppy-free	Poppy-free	No change
Logar	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Panjshir	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Parwan	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Wardak	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Central Region	1,223	1,236	Poppy-free	Poppy-free	No change
Kunar	626	822	364	238	-35%
Laghman	987	1,102	435	290	-33%
Nangarhar	2,027	5,241	530	Poppy-free	-
Nuristan	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Eastern Region	3,639	7,165	1,329	528	-60%
Badakhshan	3,561	4,305	1,573	7,408	371%
Kunduz	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Takhar	Poppy-free	Poppy-free	Poppy-free	155	-
Baghlan	188	615	Poppy-free	Poppy-free	No change
North-eastern Region	3,750	4,920	1,573	7,563	381%
Balkh	2,177	4,542	132	181	37%
Faryab	4,778	6,929	532	565	6%

Jawzjan	708	1,359	Poppy-free	153	-
Samangan	141	132	Poppy-free	Poppy-free	No change
Sari Pul	1,975	3,454	318	Poppy-free	-
Northern Region	9,780	16,415	983	899	-9%
Helmand	109,778	122,045	142	757	434%
Kandahar	16,971	29,229	3,544	884	-75%
Uruzgan	9,746	14,557	647	115	-82%
Zabul	980	1,531	882	118	-87%
Nimroz	2,304	2,429	102	Poppy-free	-
South-Western Region	139,780	169,791	5,316	1,874	-65%
Khost	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Paktya	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Ghazni	127	163	Poppy-free	Poppy-free	Poppy-free
Paktika	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Southern Region	127	163	Poppy-free	Poppy-free	-
Badghis	4,904	14,110	368	1255	241%
Farah	11,461	15,829	127	196	54%
Ghor	1,451	1,784	647	228	-65%
Hirat	290	1,337	Poppy-free	Poppy-free	Poppy-free
Western Region	18,107	33,059	1,142	1,679	47%
Total (rounded)	177,000	233,000	10,800	12,800	19%

Poppy-free provinces are provinces with less than 100 ha in cultivation. National total includes opium poppy found in poppy-free provinces. Numbers are rounded, percentages are calculated based on exact figures.

ANNEX 1: TIMELINE OF RECENT DRUG ENFORCEMENT DECREES ISSUED BY THE DE FACTO AUTHORITIES²

- On 3 April 2022, the DfA issued a Decree on the “Prohibition of Poppy Cultivation and All types of Narcotics”. The Decree not only prohibited poppy cultivation but also usage, transportation, manufacture, trade, export, and import of all types of narcotics.
- The April 2022 decree included a two-month grace period granted to farmers to harvest and sell, which allowed for the 2022 opium season to be concluded unimpeded by the ban. That year the harvest was estimated at 6,200 tons of opium, close to the 2021 total and equivalent to some 350 – 580 tons of heroin of export quality.
- Most of the 2023 winter crop (including opium poppy) had been sown in November 2022 and harvest started in April 2023.
- In January 2023, the DfA promulgated a ban on the import of precursors used to manufacture heroin from opium. Precursors have been controlled in Afghanistan already before the decree, the ban, however, reinforced the signalling of strong enforcement.
- In March 2023, according to media sources, the DfA issued a 10-month deadline to traders to export opium out of Afghanistan, waiving traditionally imposed taxes for the trade in exported opium. The stated goal of the DfA was reportedly to end the opium trade in Afghanistan by liquidating all remaining stocks and discouraging future poppy cultivation.
- In October 2023, the DfA's Supreme Court published a circular detailing the penalties associated with the supply of drugs and to clarify the consequences of not complying with the drug ban. The circular imposed penalties ranging from 6 to 12 months in jail, depending on the quantity cultivated. Trafficking carried a penalty of 1 to 7 years in jail depending on the amount of drugs.
- In April 2024 DfA Supreme Court issued decree with details about sentences of drugs transportation and trade in country which covered the penalties exposed on the October 2023 decree. This affected the activity in some markets, especially in the Western region.

² UNODC, Afghanistan Opium Survey 2023, August 2023; UNODC World Drug Report 2024, June 2024.

Post-Taliban Development



* UNODC cannot confirm the validity as the decree was issued verbally and circulated to specific de facto authorities only

Opium cultivation in Badakhshan in May, 2024



Adjacent opium fields at very different stages of cultivation. The field on the background is in flowering stage, while the one on the foreground is in a much earlier cabbage stage.



ANNEX 2

**ISLAMIC EMIRATE OF AFGHANISTAN
MINISTRY OF INTERIOR AFFAIRS
DEPUTY MINISTRY OF COUNTER NARCOTICS
POLICY AND STRATEGY MANAGEMENT OFFICE**

Number: 352

Date: 4/4/1445 (Islamic Date)

Subject: *Submission of Suggestions from the Deputy Ministry of Counter-Narcotics Regarding the UN Poppy Cultivation Report*

To: *His Excellency, the Minister of Foreign Affairs*

Attention: Directorate of Border and Security Coordination

(Islamic Greetings) Peace be upon you, and the mercy and blessings of Allah,

In response to your letter No.421 dated 3/4/1446, we would like to inform you that the esteemed Deputy Ministry of Counter-Narcotics has submitted a two-page document containing its opinions and recommendations concerning the dissemination of the UN report on opium poppy cultivation statistics in the provinces of the country.

We kindly request that, considering the suggestions and recommendations provided, appropriate measures be taken to facilitate the dissemination of the report.

This office will ensure that all necessary actions are considered in line with the content of the report and the recommendations submitted.

Respectfully,

Alhaj – Brigadier General – Malawi Haseebullah “Ahmadi”

Chief of Staff – Deputy Ministry of Counter-Narcotics

Summary of Report on Opium Poppy Cultivation for the United Nations:

We acknowledge receipt of your recent report, which provides an overview of opium poppy cultivation statistics. We appreciate the valuable information and kindly request that to share detail report which should include more detailed sections on narcotics production, pricing, and the social and economic conditions of farmers, as well as other relevant issues.

Our observations regarding the documents you provided are outlined below:

In the United Nations Office's 2024 report, it is stated that opium poppy cultivation covers 12,800 hectares, with Badakhshan province recording the highest cultivation at 7,408 hectares. Cultivation has also been reported in the provinces of Badghis, Kandahar, Helmand, and Faryab, each with less than 1,000 hectares.

Compared to 2023, opium poppy cultivation has increased by 19% in 2024. According to your report, the highest cultivation is in Badakhshan province. However, our regional reports indicate that the cultivation is concentrated in the districts of Argo, Khash, Jorm, Darayem, and Shahr-e-Bazarg, where the fields have been completely eradicated. The issue of eradication has been a major concern across all provinces where opium poppy is being cultivated.

Unfortunately, the UNODC office did not mention the eradication of opium poppy fields in its 2024 report. As you are aware, security forces in all provinces have taken serious actions against opium cultivation, compelling farmers not to grow poppy on their fields.

Our regional information indicates that approximately 16,000 hectares of opium poppy have been eradicated since the end of 2023 until now (October 2024). Of these, around 6,000 hectares were measured using GPS technology. All GPS data has been shared with the United Nations Office on Drugs and Crime (UNODC). However, after reviewing the GPS data, it was noted that some GPS points were recorded multiple times on the same date due to GPS devices being left on, which resulted in inaccurate data collection. In some instances, barren land and other crops were mistakenly classified as poppy fields. While there may be discrepancies in the GPS data, this does not invalidate all the figures.

If opium poppy eradication efforts in Badakhshan province had been conducted with the technical cooperation of UNODC, it is likely that accurate GPS data for more than 7,000 hectares would have been recorded. The lack of cooperation from the UNODC office has negatively impacted these eradication efforts.

Given the realities in the field, it is not possible for us to verify the accuracy of the 2024 opium poppy cultivation estimates provided by UNODC. This is because the technical team from the Counter Narcotics Department of the Ministry of Interior does not have access to satellite imagery and, as such, cannot assess the accuracy of the data without it.

In Badghis province, poppy cultivation was minimal, and the cultivated land was eradicated promptly. The climate in Badakhshan varies across different districts; for example, in some districts, cultivation may begin in Hamal (March), while in others, it may occur in Sawr (April) or Jawza (June). The satellite imagery used for the report would have captured data at a specific point in time.

In Badakhshan, all opium poppy fields have been eradicated and your data should accurately reflect the situation, considering that the eradication process is ongoing, and images may have been taken before this was completed.

In Kandahar and Helmand, the focus of eradication efforts has been around farmers' homes, and no home or field has been left untouched by these efforts. Similarly, in Faryab, Balkh, Kunar, and Laghman provinces, eradication continued up to the time of harvest, preventing farmers from successfully harvesting their crops.

Based on the 2024 report on opium poppy cultivation, we kindly request that you share the full text of the report for further review and feedback.

