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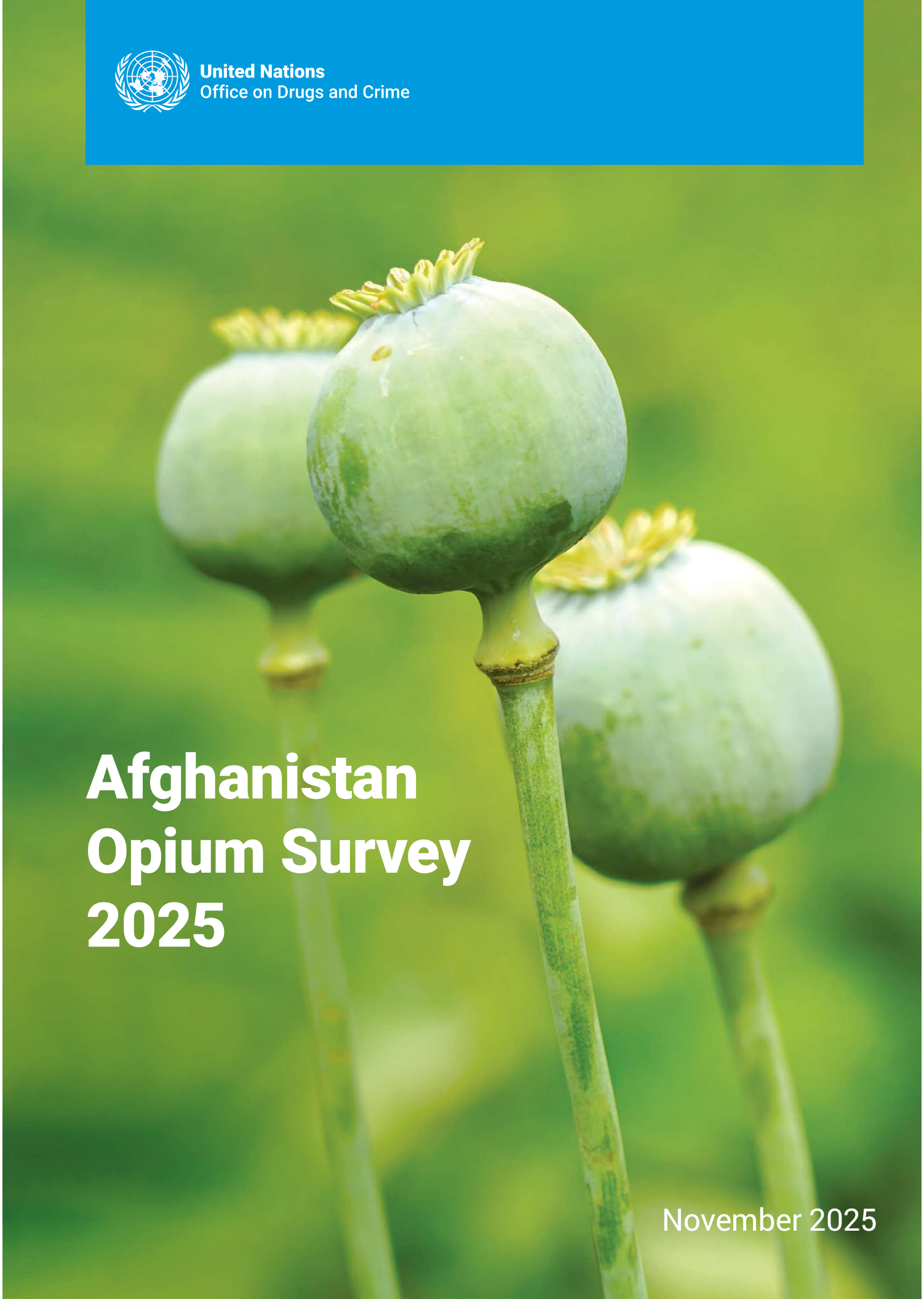

Afghanistan Opium Survey 2025

November 2025

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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Mandates
The opium surveys are being implemented within the technical framework of the UNODC Illicit Crop Monitoring Programme (ICMP), established in 1999 upon request of the Commission on Narcotic Drugs in its resolution 42/3, Monitoring and verification of illicit cultivation. The objective of ICMP is to assist the international community in monitoring the extent and evolution of illicit crops and to compile reliable and internationally comparable data. Currently, UNODC carries out and supports monitoring activities in the following countries affected by illicit crop cultivation: coca surveys in Bolivia, Colombia, and Peru; and opium poppy surveys in Afghanistan, Mexico and Myanmar. ICMP is part of UNODC's Research and Trend Analysis Branch.

Afghanistan Opium Survey 2025

United Nations
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KEY FINDINGS

Sustained ban enforcement and drought conditions drive reductions in opium production in 2025

During the 2025 season, most farmers continued to adhere to the ban on opium poppy cultivation, which is in its third year of enforcement. The total area under opium poppy cultivation in 2025 was estimated at 10,200 hectares, 20% lower than in 2024 (12,800 hectares) and a fraction of the pre-ban levels recorded in 2022, when an estimated 232,000 hectares were cultivated nationwide.

Potential opium production 2025 declined at a rate greater than that of cultivation, dropping by 32% compared to 2024, to an estimated 296 tons. The sharper decline in production is linked to reported crop failures and drought conditions that stressed the plants, particularly in Badakhshan, the main producing province. The estimated 296 tons of opium could be converted into approximately 22–34 tons of export-quality heroin. This is lower than the 32–50 tons produced in 2023, and significantly below the 350–580 tons estimated in 2022.

The De facto Authorities of Afghanistan reported that over 4,000 hectares of opium poppy were eradicated in 2025, although UNODC could not technically verify this number. While lower than the 16,000 hectares reported in 2024, this still corresponds to about 40% of the estimated cultivation area. According to the data, 87% of eradication occurred before satellite imagery was acquired, meaning that UNODC's 2025 estimates of opium poppy cultivation do not include these eradicated fields. Eradication efforts occasionally sparked violent resistance, particularly in the northeast, where protests led to unrest and casualties.

Sharp decline in opium income by 48% deepens rural economic vulnerability

Farmers' income from opium sales to traders has dropped by 48% from US$260 million in 2024 to US$134 million in 2025. This decline results from falling production and falling prices. As a result, farmers who previously depended on opium poppy cultivation face severe economic challenges with three consecutive years of minimal or no income from illicit crops.

Farmers largely replaced opium poppy with cereals and, to a lesser extent, summer crops. However, over 40% of available farmland remained fallow due to the lack of profitable alternatives, limited agricultural outputs and adverse climate conditions.

Opium poppy continues to be far more profitable per hectare than wheat or cotton, deepening rural vulnerability. In 2025, declining opium prices and smaller yields meant that a hectare of opium generated about US$17,000 in Helmand (a 43% decline from the previous year) and around US$12,000 in Badakhshan (35% less than in 2024). Despite this drop, opium remained far more profitable than most licit crops. For comparison, staple crops such as wheat yielded only about US$800 per hectare, while a key cash crop like cotton provided roughly US$1,600 per hectare to farmers.

Signs of expanding opium cultivation beyond Afghanistan

The sustained high prices might have triggered opium poppy cultivation in countries in the immediate region. For instance, eradication of opium poppy in two countries near Afghanistan increased from 5,868 hectares in 2022 to 13,200 in 2023 (latest official data available). Market indicators suggest supply from elsewhere, too, as opiates seizures and opium prices fell despite reduced opium production from Afghanistan and the fairly steady nature of demand for opiates. Such a shift could be an example of the so-called balloon effect, where enforcement in one country leads to the displacement of illegal activities to another – a phenomenon that has

been observed elsewhere. More information and close monitoring of the situation are needed to fully understand the extent to which cultivation may have shifted to countries in the region and far beyond than Afghanistan.

Increasing methamphetamine seizures and falling prices suggest greater supply

Trafficking in synthetic drugs, especially methamphetamine, seems to have increased since the ban, with seizure events in and around Afghanistan higher than before, indicating a growing risk of synthetic drug substitution as opiate production falls.

Prices for methamphetamine in Afghanistan and neighbouring countries have also decreased in line with higher seizure volumes. UNODC's systematic monitoring of methamphetamine prices in Afghanistan began in late 2022, and monthly kilogram prices initially fluctuated between US$600 and US$850. Beginning in late 2024, methamphetamine prices fell sharply, dropping below US$600 per kilogram. The price decline together with increasing seizures can reflect an increase in production capacity or greater availability stemming from inflows from other countries; at present, neither dynamic has been conclusively verified, and both remain plausible contributors to the observed shift.

Intersecting pressures threaten counternarcotics gains and rural stability

The economic loss from opiate production coincided with severe droughts that significantly reduced agricultural output and left large areas of farmland fallow. Simultaneously, the return of approximately 4 million Afghans from neighbouring countries has intensified competition for scarce jobs and resources, further straining rural communities already burdened by declining farm income, reductions in humanitarian aid, and the absence of viable legal economic opportunities.

Rural livelihoods face increased pressures from reduced income opportunities, climatic shocks, and limited access to viable alternatives. Despite recent declines, opium prices remain five times higher than pre-ban averages, creating strong incentives to resume illicit production if enforcement weakens.

POLICY IMPLICATIONS

Expanding alternative development in Afghanistan and strengthening international support is an urgent priority

Addressing the humanitarian crisis and economic vulnerabilities of Afghanistan's rural population through international support, climate adaptation, and inclusive development is essential to sustain counternarcotics progress and ensure long-term stability. Without viable and profitable licit economic alternatives, rural communities may revert to opium poppy cultivation or turn to other illicit activities.

Alternative development goes beyond crop substitution by addressing the broader socio-economic conditions that drive communities toward opium poppy cultivation. Effective alternative development initiatives focus on improving access to markets, enhancing agricultural productivity, and creating off-farm employment opportunities, while tailoring these efforts to local contexts. Linked with education, health services, and infrastructure investment, alternative development can offer communities a viable path outside the drug economy.

Opium revenues per hectare remain up to 20 times higher than wheat and 10 times higher than cotton. Moreover, reports from the field indicate that there are challenges in obtaining sufficient revenues from alternative crops. Improving the livelihoods of farming communities most at risk for taking up opium poppy cultivation can make these more resilient towards illicit drug production.

For lasting impact, such programs require more strategic and coordinated approach with sustained funding. Large-scale sustainable alternative development requires a long-term perspective. Under frameworks such as the Doha process – whereby the international community engages with the DfA through its Counter Narcotic Working Group as much as its Private Sector Working Group-, can provide support to:

- Better targeted and more coordinated, funded large-scale alternative development programmes that create jobs, improve infrastructure, and strengthen the private sector and local economies.
- Align donor efforts -as well as local authorities- to maximize impact, avoid duplication, and ensure resources reach the most affected communities.
- Enhance regional cooperation to foster licit trade and prevent spillovers in cultivation, production, and trafficking.

Integrating climate resilience into counternarcotics and rural development strategies

Environmental challenges such as drought, low rainfall, and extreme weather are increasingly affecting agriculture and rural livelihoods. These climate shocks worsen rural hardship and reduce the viability of legal crops, making poppy cultivation more attractive. To ensure long-term success in drug control and alternative development, future strategies need to integrate climate resilience as a core component.

This includes investing in improved irrigation systems, promoting drought-resistant crop varieties, and strengthening disaster preparedness at the community level. Such measures can reduce vulnerability, stabilize rural incomes, and offer practical alternatives to households that have long relied on opium poppy cultivation. By aligning counternarcotics efforts with climate adaptation more sustainable and resilient rural economies can be built while reducing the incentives for illicit cultivation.

Ensuring sustainable reductions in illicit cultivation through structural reform

Sustaining the current low levels of opium poppy cultivation requires a shift from short-term counternarcotics measures to long-term structural reforms that address the root causes of illegal activities. Targeted investments in market infrastructure, vocational training, private sector development, and good governance are essential to strengthen livelihoods and reduce economic vulnerability. Without sustained reforms and coordinated support, recent gains -including from aid and alternative development programmes - risk being reversed, underlining the need for a comprehensive strategy that links development, governance, and counternarcotics objectives.

Expand counternarcotics focus to synthetic drug proliferation

The relative resilience of methamphetamine markets, evidenced by stable or rising seizure rates and declining prices across the region, suggests limits of existing strategies. As agricultural-based opiate production declines, synthetic drug production may become more attractive to organized crime groups due to ease of production, difficulty in detection and stable profitability. Counter-narcotics strategies must therefore broaden beyond opium to integrate synthetic drugs in monitoring, interdiction and analysis, and demand-reduction responses.

Address shifting opium market dynamics through strengthening regional monitoring and cooperation

Recent developments, including emerging indications of opium poppy cultivation in countries near Afghanistan, signal significant shifts in regional drug markets. The sharp contraction of Afghanistan's opium economy has the potential to redirect production and trafficking routes across the region.

To effectively address these evolving dynamics, a unified regional strategy based on robust evidence and international cooperation is needed. This involves strengthening cross-border collaboration to monitor emerging trends, share timely and actionable information, and coordinate enforcement efforts. This can be facilitated by intensifying regional dialogue that brings together law enforcement, border control and development agencies.

Establishing monitoring mechanisms in those countries most affected by the "balloon effect" is critical to detect and to respond to shifts in cultivation and trafficking patterns before the related illicit economies become too deeply tied with legal livelihoods.

These changes in drug markets will require not only regional cooperation but also financial support from the international community. Most of the profits from drug trafficking are not made in countries of origin, but in affluent destination countries. There is thus a shared international responsibility to address the drug problem, especially in areas threatened by increased production activity.

OPIUM POPPY CULTIVATION AND OPIUM PRODUCTION IN AFGHANISTAN 2025

Starting with the 2023 crop season, the De facto Authorites in Afghanistan enforced a nationwide narcotic ban that forbade production, trafficking and use of any form of drugs. This measure, which was rigorously enforced in most parts of the country, resulted in an unprecedented reduction in the area under cultivation and signaled a dramatic shift in the rural economy. For many farming communities, especially those in traditional opium poppy-growing regions, the ban sharply curtailed a key source of cash income. The impact was immediate: the 2023 harvest marked the lowest levels of opium production recorded in decades.

Completing its third year of enforcement during the 2025 season, most farmers continue to adhere to the ban, with only limited areas of illicit cultivation remaining. The total area under opium poppy cultivation in 2025 was estimated at 10,200 hectares, 20% lower than in 2024 (12,800 hectares) and only 4% of the pre-ban levels recorded in 2022, when an estimated 232,000 hectares were cultivated nationwide.

While overall cultivation remains minimal, regional variations persist. As in the previous year, opium poppy cultivation in 2025 was concentrated primarily in the northeastern part of the country, with Badakhshan province accounting for the largest share. Takhar province, also in the northeast, recorded a notable increase in cultivation compared to 2024. However, these pockets of activity contrast sharply with trends in most provinces, where cultivation has continued to decline. Four provinces with opium poppy cultivation in 2024 (Balkh, Farah, Laghman, Uruzgan) were declared opium poppy-free in 2025 due to having less than 100ha of opium poppy cultivation. The near elimination of cultivation from traditional strongholds illustrates the scale and durability of the ban on opium poppy cultivation.

These continued low levels of cultivation, coupled with a changing geographical pattern, could suggest that Afghanistan's rural economy is undergoing profound changes. In the short term, farmers have experienced significant income losses, while the long-term socio-economic consequences for rural households remain uncertain - particularly in areas where viable and sustainable alternative livelihoods are still lacking.

FIGURE 1 ESTIMATES OF POTENTIAL OPIUM PRODUCTION (TONS) AND OPIUM POPPY CULTIVATION (HECTARES) IN AFGHANISTAN, 2000-2025

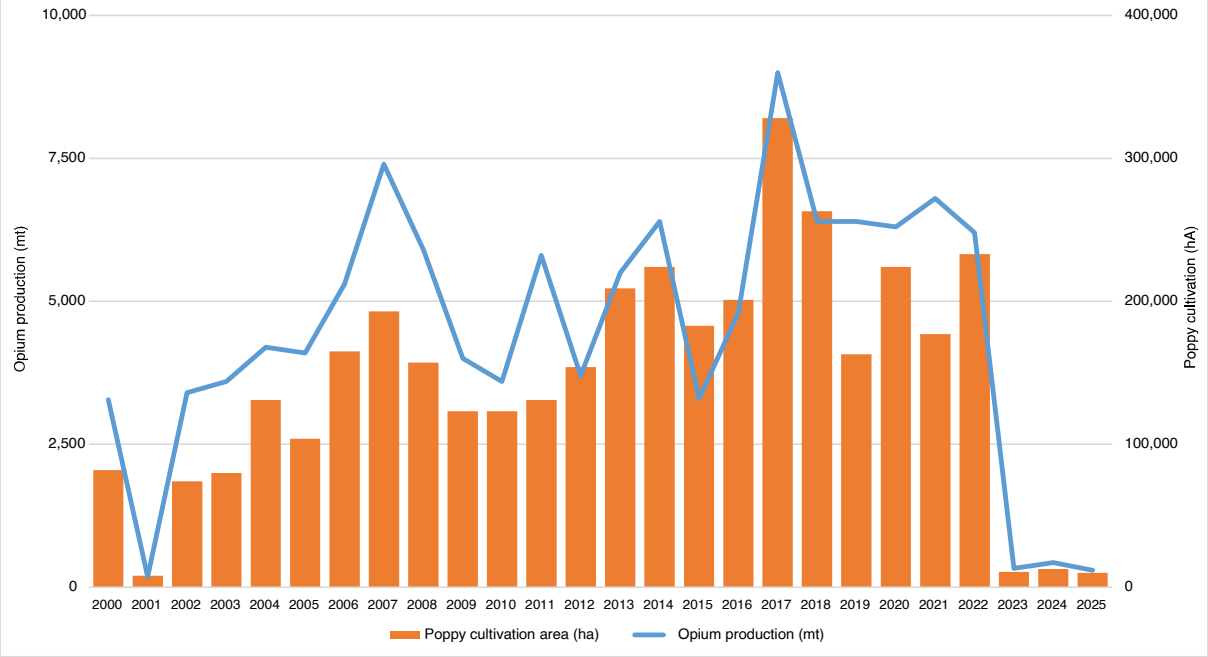
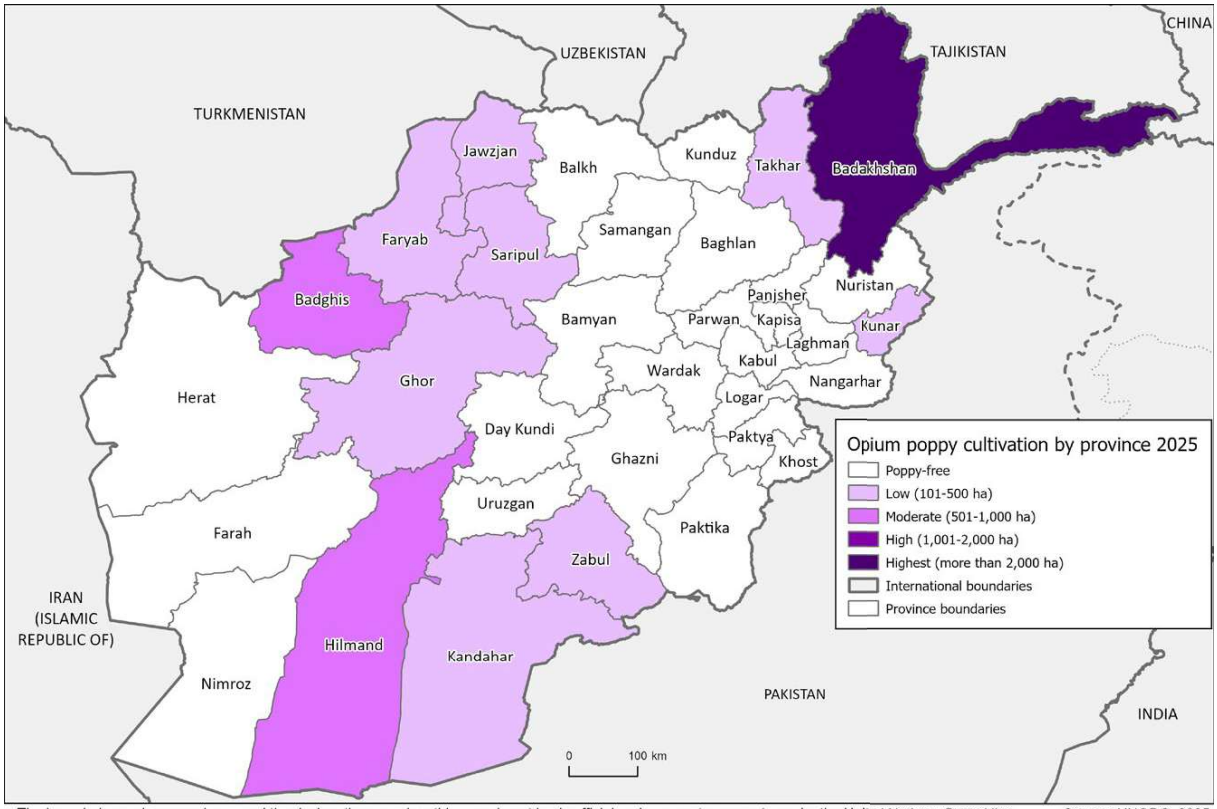


FIGURE 2 OPIUM POPPY CULTIVATION BY PROVINCE, 2025



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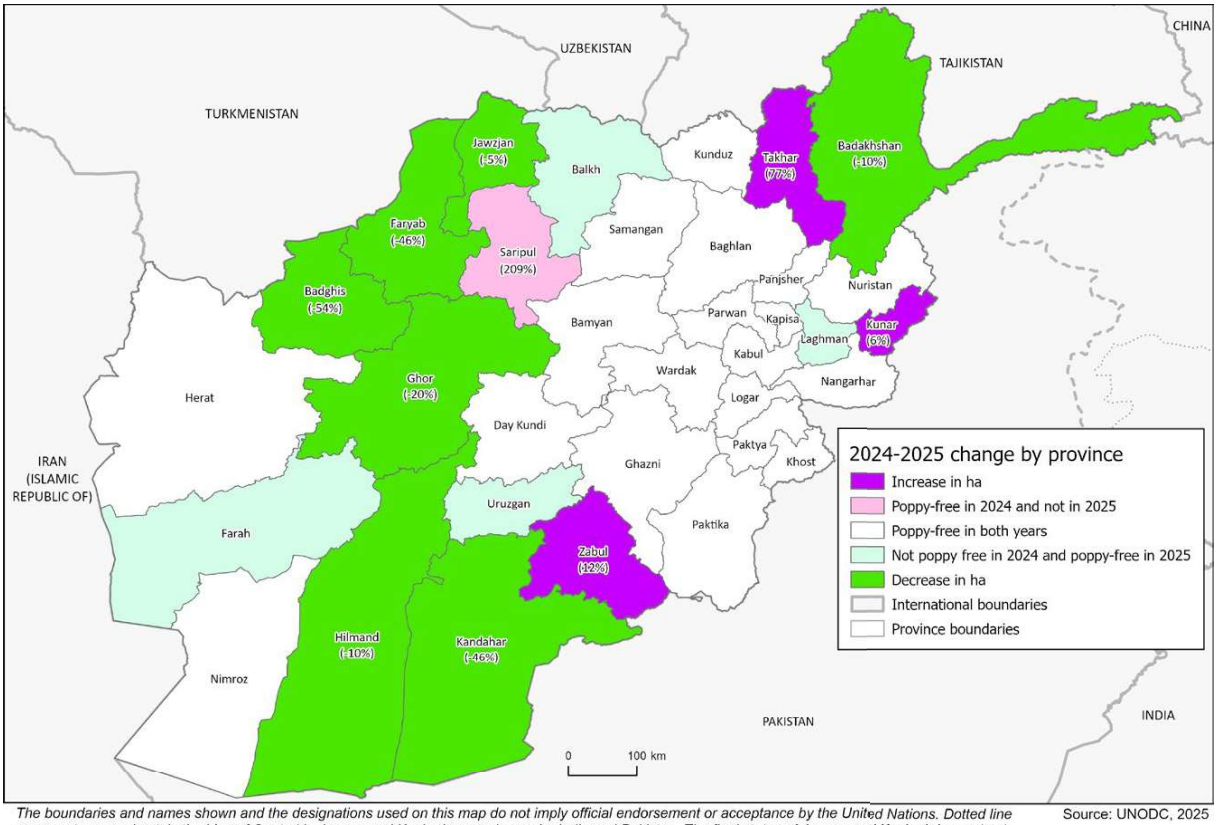
Source: UNODC, 2025

FIGURE 3 CHANGE IN OPIUM POPPY CULTIVATION BY PROVINCE, 2024-2025



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Source: UNODC, 2025

FIGURE 4 REGIONAL DISTRIBUTION OF OPIUM POPPY CULTIVATION, 2022-2025

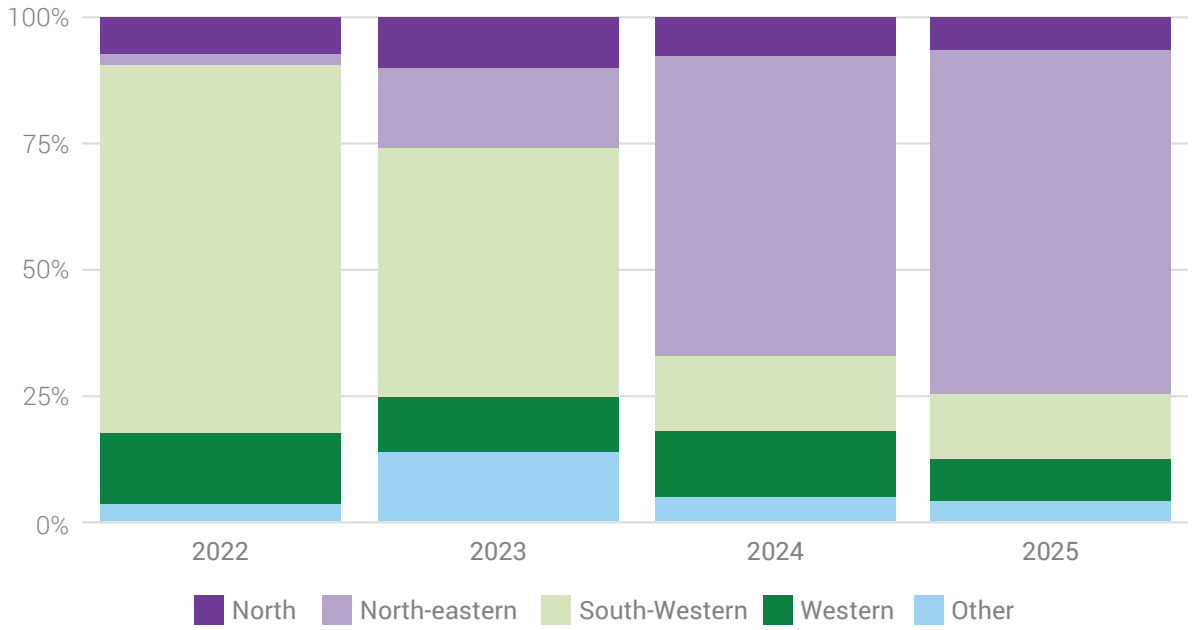


TABLE 1. OPIUM POPPY CULTIVATION BY PROVINCE AND REGION, 2021-2025

PROVINCE	Cultivation 2021 (ha)	Cultivation 2022 (ha)	Cultivation 2023 (ha)	Cultivation 2024 (ha)	Cultivation 2025 (ha)	Change 2024-2025 (%)
Bamyan	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Day Kundi	792	837	Poppy-free	Poppy-free	Poppy-free	No change
Kabul	216	216	Poppy-free	Poppy-free	Poppy-free	No change
Kapisa	216	184	Poppy-free	Poppy-free	Poppy-free	No change
Logar	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Panjshir	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Parwan	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Wardak	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Central Region	**1,223**	**1,236**	**Poppy-free**	**Poppy-free**	**Poppy-free**	**No change**
Kunar	626	822	364	238	252	6%
Laghman	987	1,102	435	290	Poppy-free	To poppy-free
Nangarhar	2,027	5,241	530	Poppy-free	Poppy-free	No change
Nuristan	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Eastern Region	**3,639**	**7,165**	**1,329**	**528**	**252**	**-52%**
Badakhshan	3,561	4,305	1,573	7,408	6,639	-10%
Baghlan	188	615	Poppy-free	Poppy-free	Poppy-free	No change
Kunduz	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Takhar	Poppy-free	Poppy-free	Poppy-free	155	274	77%
North-eastern Region	**3,750**	**4,920**	**1,573**	**7,563**	**6,913**	**-9%**
Balkh	2,177	4,542	132	181	Poppy-free	To poppy-free
Faryab	4,778	6,929	532	565	304	-46%
Jawzjan	708	1,359	Poppy-free	153	146	-5%
Samangan	141	132	Poppy-free	Poppy-free	Poppy-free	No change
Sari Pul	1,975	3,454	318	Poppy-free	116	209%*
Northern Region	**9,780**	**16,415**	**983**	**899**	**566**	**-37%**
Helmand	109,778	122,045	142	757	681	-10%
Kandahar	16,971	29,229	3,544	884	481	-46%
Nimroz	2,304	2,429	102	Poppy-free	Poppy-free	No change
Uruzgan	9,746	14,557	647	115	Poppy-free	To poppy-free
Zabul	980	1,531	882	118	132	12%

South-Western Region	**139,780**	**169,791**	**5,316**	**1,874**	**1,294**	**-31%**
Khost	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Ghazni	127	163	Poppy-free	Poppy-free	Poppy-free	No change
Paktya	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Paktika	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Southern Region	**127**	**163**	**Poppy-free**	**Poppy-free**	**Poppy-free**	**No change**
Badghis	4,904	14,110	368	1255	573	-54%
Farah	11,461	15,829	127	196	Poppy-free	To poppy-free
Ghor	1,451	1,784	647	228	183	-20%
Hirat	290	1,337	Poppy-free	Poppy-free	Poppy-free	No change
Western Region	**18,107**	**33,059**	**1,142**	**1,679**	**756**	**-55%**
Total (rounded)	**177,000**	**233,000**	**10,800**	**12,800**	**10,200**	**-20%**

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

** While classed as poppy-free in 2024 due to the province holding less than 100 ha in cultivation, Sari Pul had some opium cultivation. The percentage change has been calculated using that value.*

Potential opium production declined by 32% compared to 2024

Production estimates for 2025 declined at a rate greater than cultivation, by 32% compared to 2024 to 296 tons. The greater rate of declining productivity is related to reported crop failures and drought that stressed crops, especially in the main producing province, Badakhshan. For 2025, the estimated total of 296 tons of opium could be converted into a range of 22-34 tons of heroin of export quality (50-70% purity), which is lower than the 32-50 tons of export quality heroin estimated in 2023, and substantially less than the 350-580 tons estimated in 2022.

The North-eastern provinces remain the centre of opium production in 2025, a development that started in 2023 and expanded since then. Other provinces, such as Helmand and Kandahar, have continued to see declines. However, even within these provinces – and others in the South-west, small but significant pockets of opium production remain, mostly in remote or less accessible areas.

FIGURE 5 REGIONAL DISTRIBUTION OF OPIUM PRODUCTION, 2022-2025

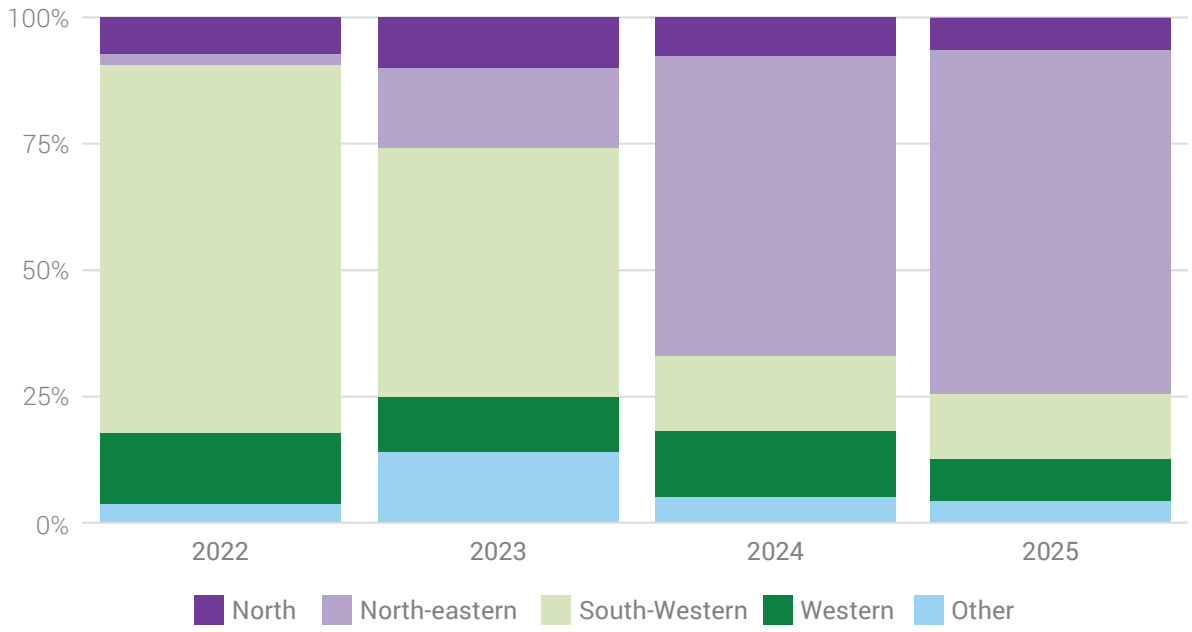
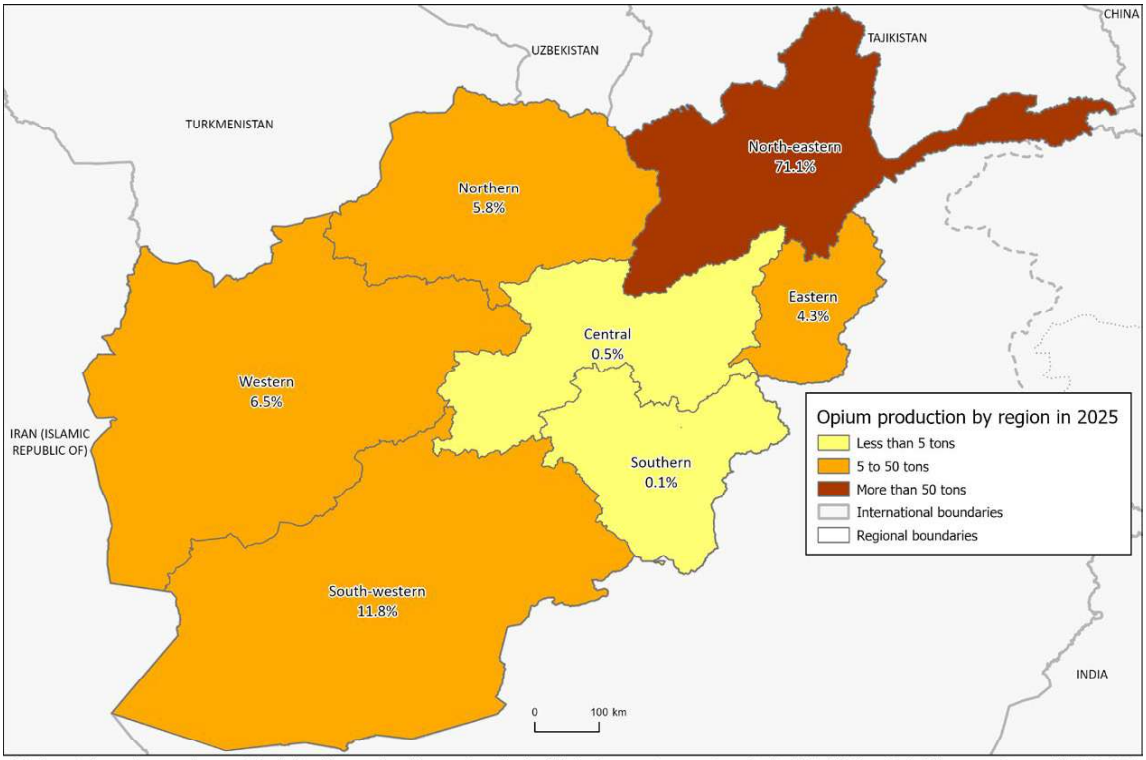


TABLE 2. REGIONAL ESTIMATED TOTALS OF OPIUM POPPY CULTIVATION IN HECTARES AND POTENTIAL OPIUM PRODUCTION IN TONS, 2023-2025[1]

		Region							
	Year	Central	Eastern	Northern	North-eastern	Southern	South-western	Western	National
Opium Poppy (ha)	2023	Poppy-free	1,329	983	1,573	Poppy-free	5,316	1,142	**10,800**
	2024	Poppy-free	528	899	7,563	Poppy-free	1,874	1,679	**12,800**
	2025	Poppy-free	413	641	6,950	Poppy-free	1,324	824	**10,200**
Opium (Tons)	2023	Poppy-free	47	37	60	Poppy-free	158	25	**333**
	2024	Poppy-free	23	34	286	Poppy-free	49	39	**433**
	2025	Poppy-free	13	17	210	Poppy-free	35	19	**296**
Yield (kg/ha)	2023	-	34.8	35.3	35.4	-	29.8	21.3	**32.3**
	2024	-	39.2	34.8	37.7	-	25.8	22.9	**33.9**
	2025	-	30.6	26.7	30.2	-	26.3	23.2	**29**

FIGURE 6 POTENTIAL OPIUM PRODUCTION BY REGION IN 2025



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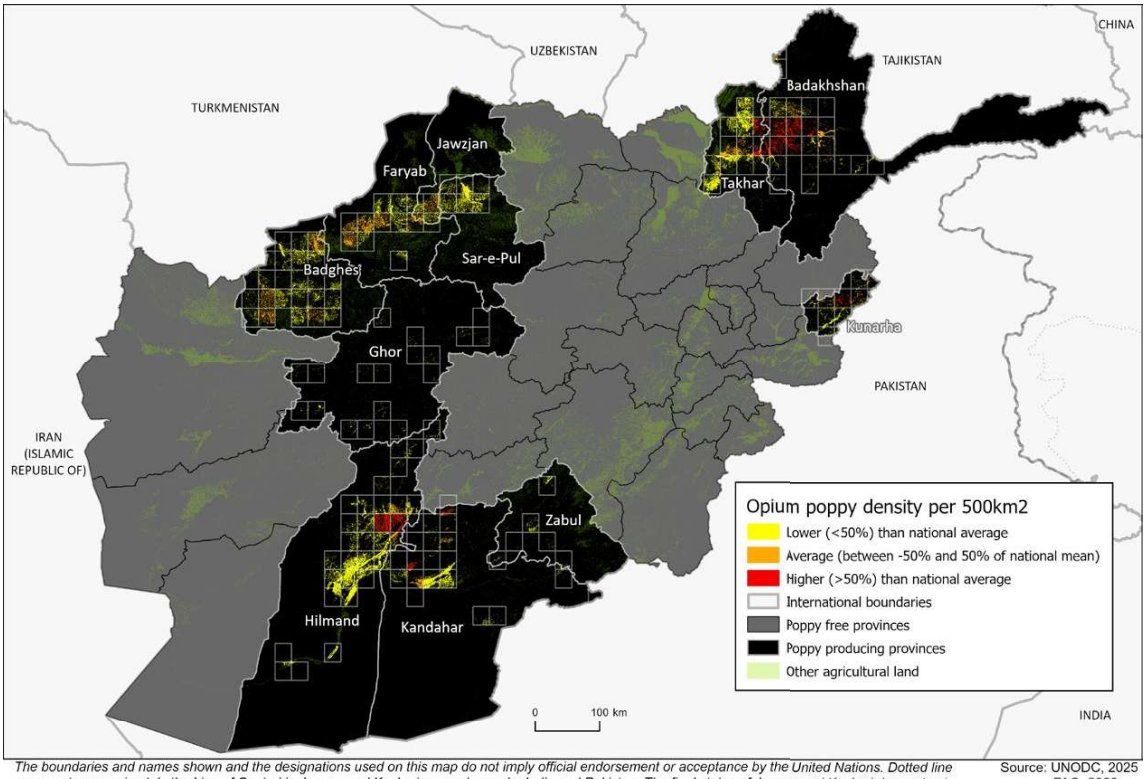
Source: UNODC, 2025

FIGURE 7 POTENTIAL OPIUM PRODUCTION DENSITY IN AGRICULTURAL LAND PER 500KM2 IN 2025.



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Source: UNODC, 2025
FAO, 2020

Reported eradication by the De facto Authorities

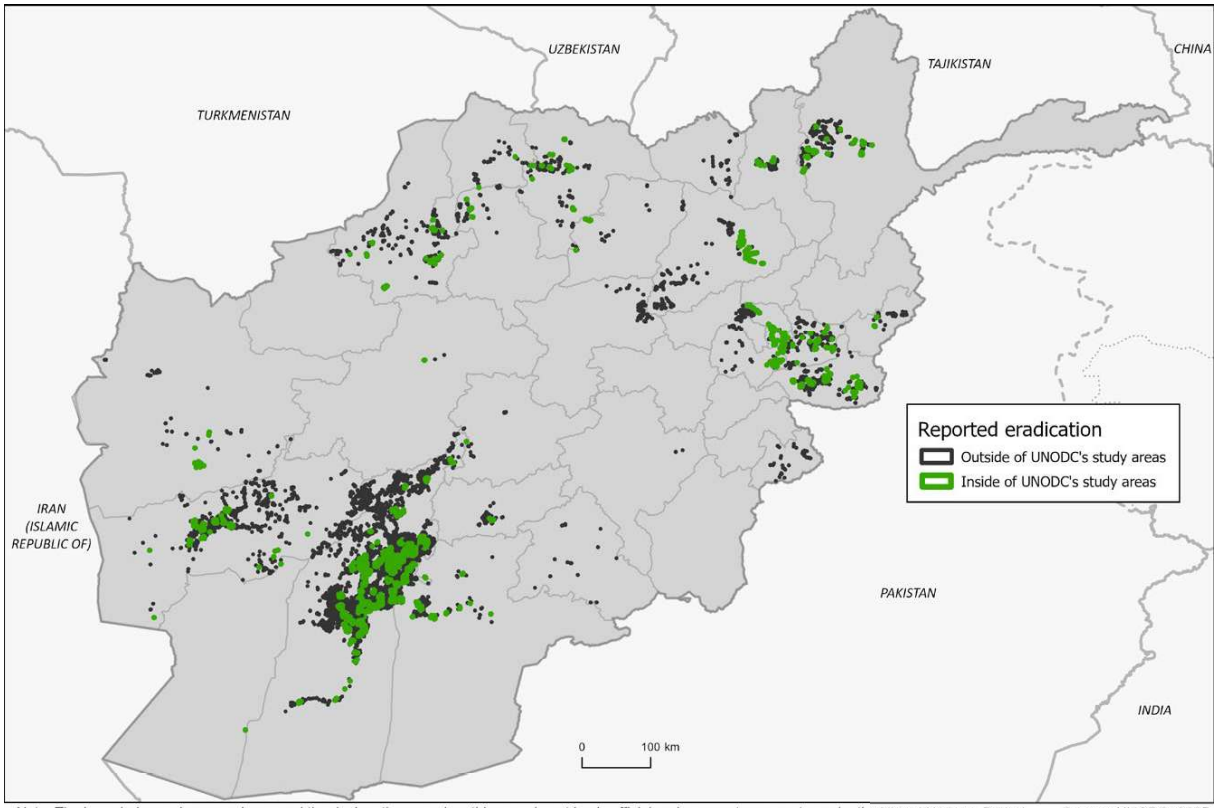
The DfA reported to UNODC that nearly 34,000 fields or more than 4,000 hectares of opium poppy were eradicated during the 2025 season. UNODC could not technically verify the information provided by the DfA. Although this figure is significantly lower than the 16,000 hectares reported in 2024, according to the DfA this is partly due to a lack of equipment to record eradication, it still represents roughly 40 percent of the estimated area under cultivation. According to the data received, 87% of eradication occurred before the acquisition of satellite imagery. This means that most of the eradication is accounted for as UNODC's 2025 area estimates do not include these eradicated fields.

The DfA reportedly faced challenges in accurately recording eradication due to limitations in equipment and training, affecting the reliability of the reported data. Reported eradication efforts varied considerably by province and were not consistently proportional to the extent of opium poppy cultivation. For example, in provinces with high cultivation such as Badakhshan eradication was modest. In contrast, some provinces like Helmand, Farah, or Nangarhar reported eradication activities were more intense in comparison to cultivation, suggesting that eradication efforts may have been more concentrated in regions with less cultivation or easier operational conditions.

Figure 9 below highlights this disparity. In provinces above the dashed line eradication efforts were less intense when compared to cultivation, in provinces below the dashed line they were more intense.

As reported by the United Nations Assistance Mission in Afghanistan (UNAMA), from May through July 2025, eradication operations in Badakhshan districts met local resistance,[2] with protests and open clashes between farmers and the eradication forces. Casualties were reported during some confrontations in several districts of Badakhshan, such as Argo, Jurm and Khash, where reports suggest that around a dozen civilians were killed and many more were wounded, but no specific figures were available.[3] The resistance included the burning of tractors used by DfA forces and the erection of roadblocks, leading to a temporary suspension of eradication and a DfA blackout on internet communications.

FIGURE 8 ERADICATION AS REPORTED BY THE DfA



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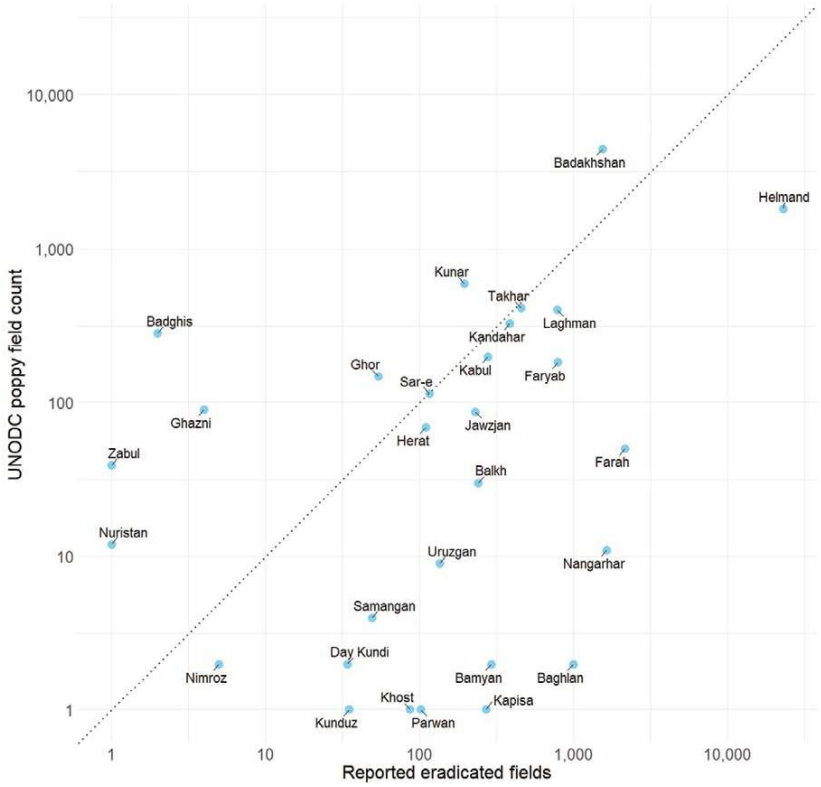
Source: UNODC, 2025

Green areas fall within UNODC study regions allowing for a more detailed analysis. Almost all eradication occurred prior to the acquisition of satellite imagery and was therefore accounted for in cultivation and production estimates. Up until 2025, Bamyan and Khost have been considered to be poppy-free based on field reports.

FIGURE 9 NUMBER OF REPORTED ERADICATED OPIUM POPPY FIELDS AND NUMBER OF IDENTIFIED OPIUM POPPY FIELDS BY PROVINCE IN AFGHANISTAN, 2025[4]



Farmers' income from opium sales remains at historic lows

In 2025, opium prices declined from the previous year but remained well above pre-ban levels. Although opium is traded at elevated prices, relative to the pre-ban period, the amounts produced in the most recent year have been some of the lowest in decades. In 2024, the average seasonal price for a kilogram of dry opium was US$780 at the trader level; in 2025, the average seasonal price was at US$570, a year-on-year decline of about 26%, but still more than five times higher than the long-running pre-ban average below US$100 a kilogram. The decline in prices was not uniform. In the South-western region, historically the country's main production area, prices fell from over US$1,100 to around US$650 per kilogram, aligning with levels in the Eastern and Western regions. This marked the sharpest drop nationwide. The North-eastern region saw a decline of about one-third from its recent peak, reporting the lowest price at US$360, followed by the Northern region at US$380 per kilogram.

Figure 10 shows that price changes generally occur around the start or end of the annual opium poppy season, when farmers are sowing or harvesting their fields.

FIGURE 10 MONTHLY NATIONAL AVERAGE DRY OPIUM PRICES 2019 - 2025

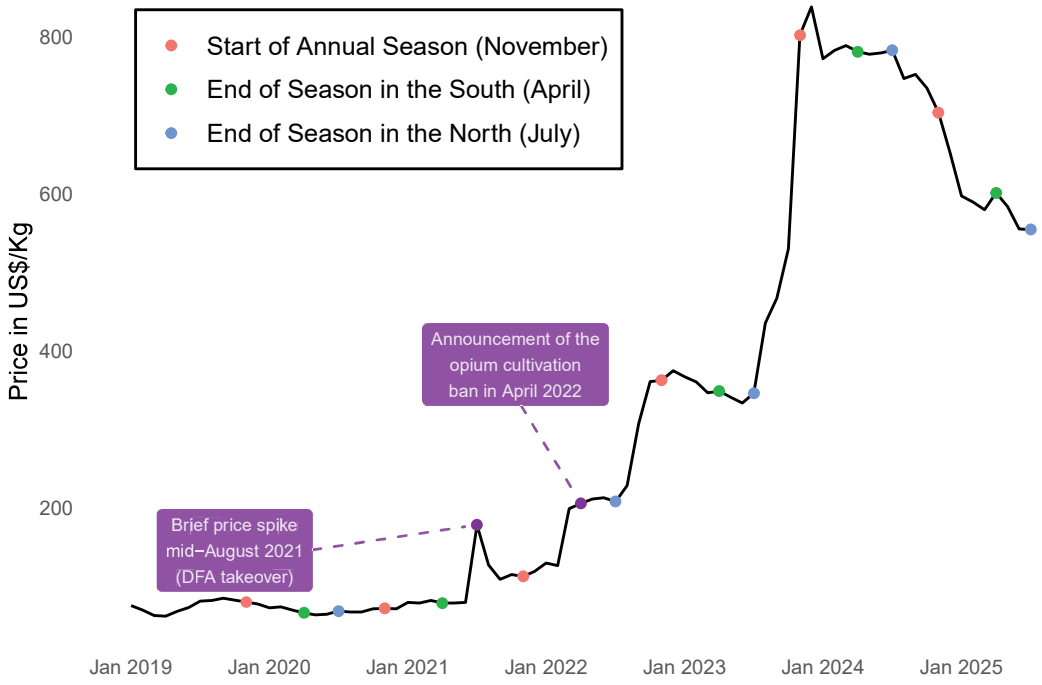
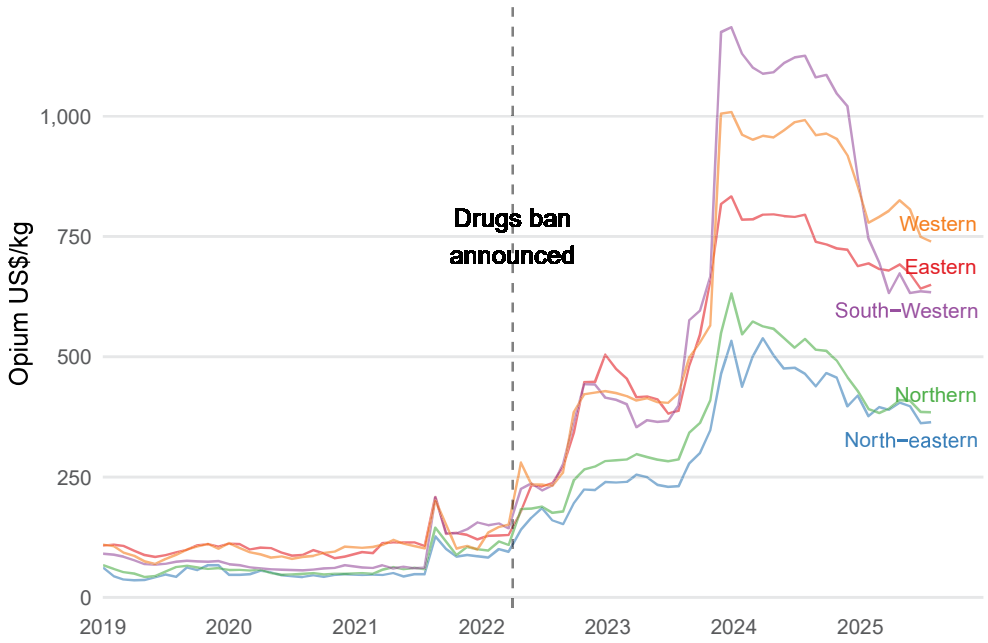


FIGURE 11 MONTHLY TRADER PRICES FOR DRY OPIUM, BY REGION, 2019-2025



Three consecutive years of sharply reduced opium poppy cultivation have had a profound impact on rural economies, particularly in areas where farmers heavily depended on opium as a primary income source. For farming households, opium poppy cultivation once accounted for up to half of the household income. The sustained downturn in cultivation and production over the past three years has likely substantially reduced earnings compared to most of the previous two decades.

The decline in income was most severe in provinces such as Helmand, Kandahar, and Nangarhar, where reliance on the opiate economy was greatest prior to the ban. In some provinces in the North-east opium poppy was cultivated at levels comparable to those prior to the ban, suggesting less volatility in household income.

As consequence of declining prices and reduced opium production, the estimated total 2025 farming income from selling opium was estimated at US$134 million or about 48% less than in 2024. This was the second-lowest estimated farming income from opium sales since 2008, which follows two consecutive years of missing opium income since the enforcement of the ban in 2023.

In 2025, declining opium prices and smaller yields meant that a hectare of opium generated about US$17,000 in Helmand (a 43% decline from the previous year) and around US$12,000 in Badakhshan (35% less than in 2024). Despite this drop, opium remained far more profitable than most licit crops. For comparison, staple crops such as wheat yielded only about US$800[5,6] per hectare, while a key cash crop like cotton provided roughly US$1,600[7,8] per hectare to farmers.

FIGURE 12 FARMERS' INCOME FROM OPIUM SALES TO TRADERS, 2008-2025[9]

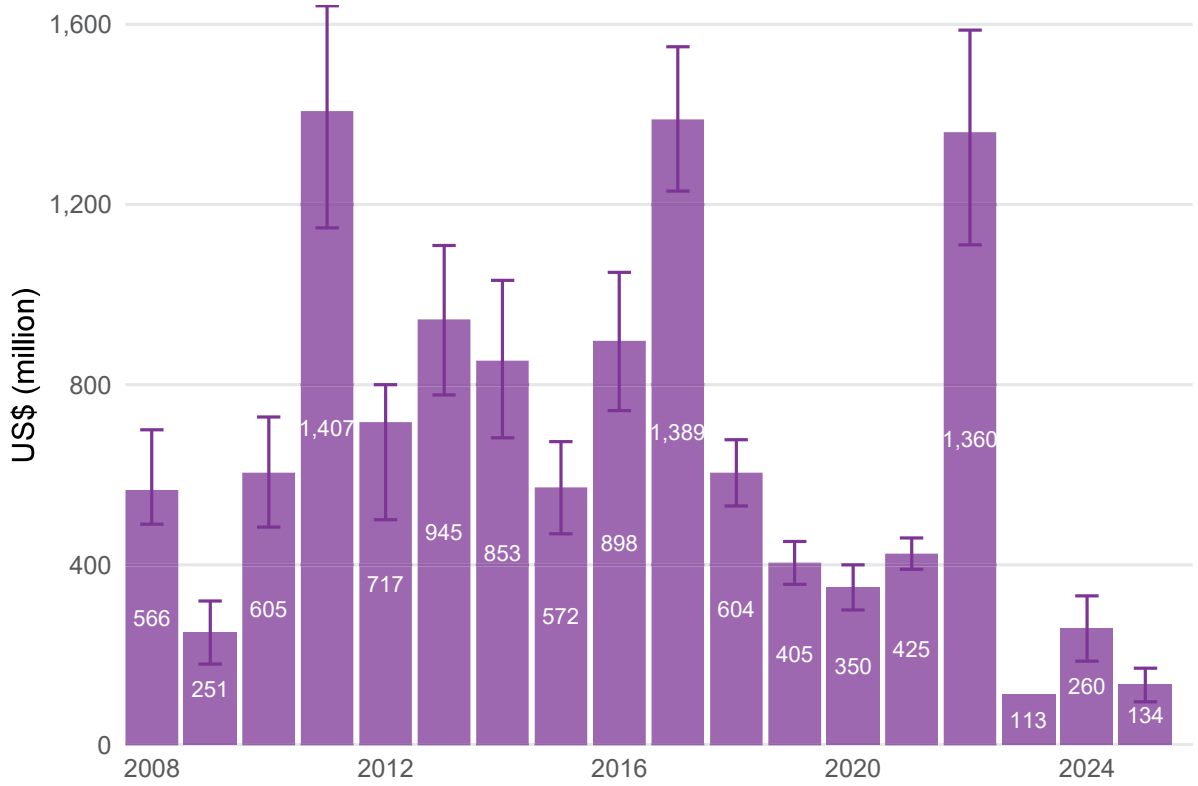


TABLE 3. REGIONAL ESTIMATED POTENTIAL OPIUM REVENUES (MILLIONS OF US$) AND THEIR SHARE OF NATIONAL TOTAL REVENUE, 2022-2025

		Region							
	Year	Central	Eastern	North	North-eastern	Southern	South-western	Western	National
Value (US$ millions)	2022	8	42	1	86	59	1,016	148	**1,400**
	2023	2	18	11	14	-	58	10	**113**
	2024	2	18	18	135	-	53	37	**260**
	2025	1	8	7	80	-	22	15	**134**
Share	2022	1%	3%	<1%	6%	4%	75%	11%	**100%**
	2023	2%	16%	9%	12%	-	51%	9%	**100%**
	2024	1%	7%	7%	52%	-	20%	14%	**100%**
	2025	1%	6%	5%	60%	-	17%	11%	**100%**

Estimates are rounded to nearest whole number and may not sum up.

WHY GROUND INFORMATION IS ESSENTIAL TO OPIUM POPPY MONITORING

Afghanistan's diverse topography, ranging from the mountainous terrain of Badakhshan to the arid plains of Helmand, creates varying environmental conditions that affect how poppy fields appear in satellite imagery. The country's fragmented agricultural landscape features small, irregularly shaped plots that often blend seamlessly with wheat, barley, and other staple crops when viewed from space. The challenge is intensified by Afghanistan's traditional farming practices, where opium poppy is at times intercropped with other crops, making spectral analysis particularly difficult. To overcome these limitations, UNODC employs a methodology that combines satellite imagery with ground-based field information and frequently uses double-dated images to understand harvesting patterns. In combination with a rigorous quality assurance process, this allows for highly accurate identification of opium poppy cultivation.

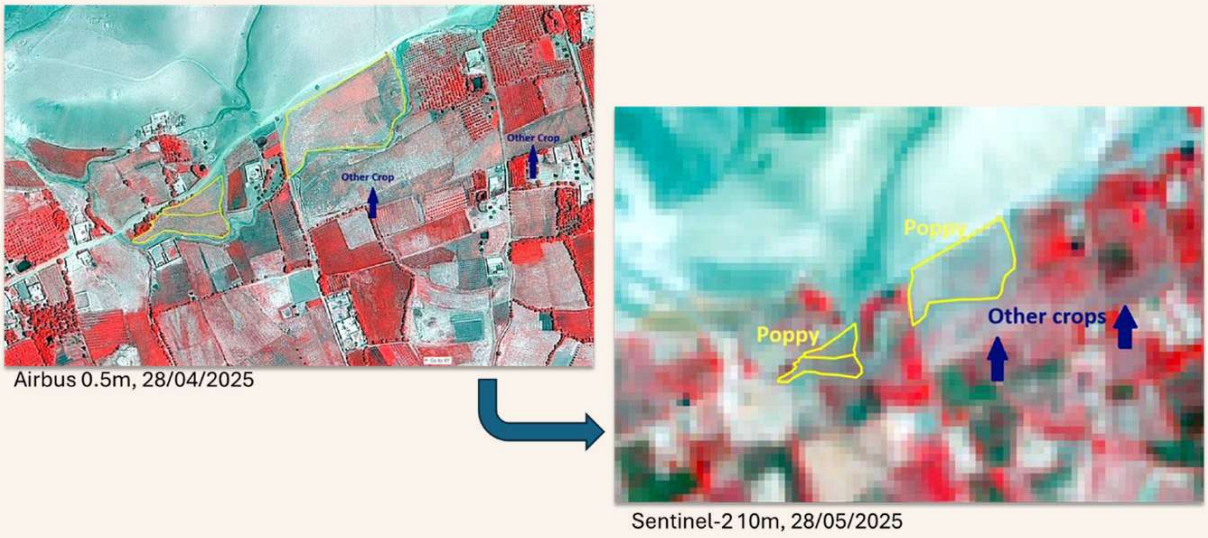
Two cases studies from different provinces illustrate these challenges, one from northern Kandahar and one from central Badakhshan.

In northern Kandahar, cumin and opium poppy have similar signatures on very high-resolution satellite imagery, leading to potential misclassification during image interpretation. Although these areas looked similar in satellite images, they appeared quite different when seen from the ground. Targeted ground verification by UN teams confirmed that many fields thought to be opium poppy crops were growing cumin, a result from successful UNODC alternative development interventions. Using field data, UNODC improved its crop classification methods by analysing satellite images taken at different times (multi-date acquisition) and comparing plant growth patterns over time (phenology aware timing). Since opium poppy is usually harvested earlier than cumin, this method helped to accurately tell these two crops apart and provide a high-quality estimate with minimal risk for cumin fields misclassified as opium poppy.

FIGURE 13 CUMIN FIELDS IN NORTHERN KANDAHAR

On the ground cumin looks distinct from poppy, but on satellite imagery they often resemble each other.

FIGURE 14 COMBINING TWO DATED IMAGERY WITH FIELD OBSERVATIONS



Opium poppy fields are typically harvested earlier than other similar looking crops. Combining two-dated imagery with field observations allowed for a clear differentiation of opium poppy from other crops.

Failed opium poppy crops in Badakhshan. In parts of central Badakhshan, field reports found similar or higher cultivation levels when compared to the 2024 season. However, the initial satellite image interpretation showed only few fields with opium poppy signatures. During UNODC's iterative quality assurance process, it was found that opium poppy had been sown at similar levels as in the previous year, but many crops failed due to water shortages. Fields near water sources appeared normal on the images, while those relying on rainwater showed signs of crop failure (see figure 15). This helped to accurately identify fields that had been planted with opium poppy, even though poor crop quality made identification difficult without the support of field information.

FIGURE 15 TWO OPIUM POPPY FIELDS AND A CEREAL FIELD WITH DIFFERENT SPECTRAL SIGNATURES.

Field A (opium poppy) did not receive enough irrigation, as is higher than a nearby canal. Because of this it lacks the typical bright pink seen in false-colour images of healthy opium poppy. Fields B (healthy opium poppy) and C (cereals), located downstream of the nearby canal, received more water and were brighter pink on the image (corresponding to more intensive green in true colours, due to higher chlorophyll content).

DEVELOPMENTS IN THE OPIATE AND METHAMPHETAMINE MARKETS

An analysis of available drug seizure and price data in and around Afghanistan show clearly that regional opiate markets continue to experience supply disruptions due to declining opium production. Seizures of opiates around Afghanistan, especially for heroin which appears to be less frequently produced, are fewer and smaller on average. While trader prices per kilogram of opium and heroin within Afghanistan jumped to record highs starting in 2023 and into 2024, they declined in 2025, suggesting that some degree of opium production is occurring in the wider region.

That said, seizure and price trends for methamphetamine appear largely uninterrupted by the enforced drugs ban in Afghanistan.

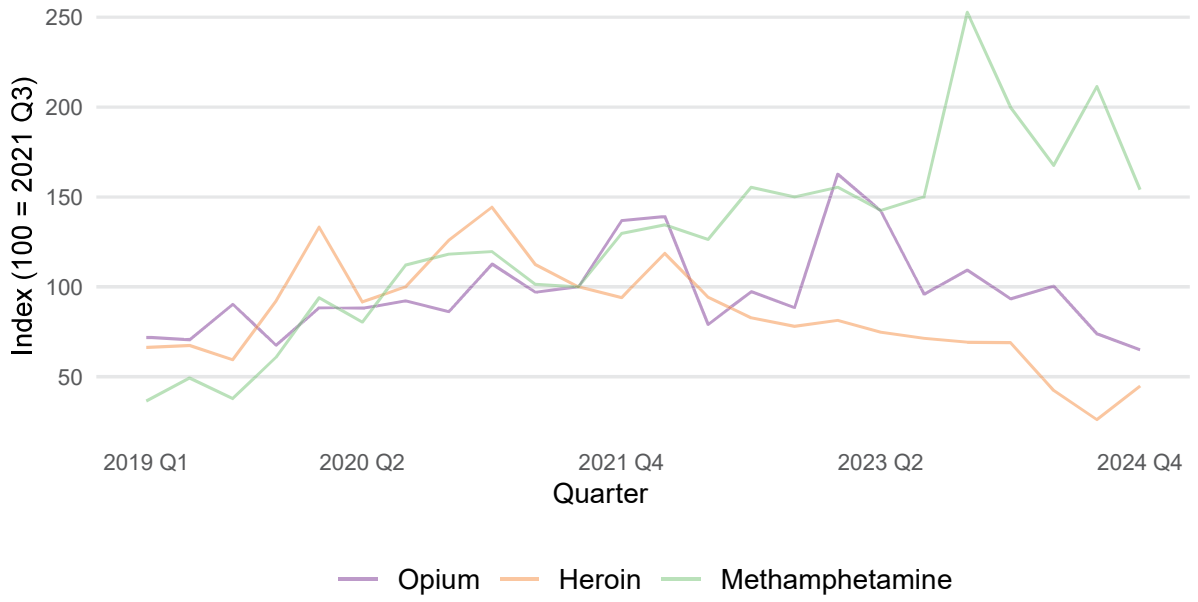
In fact, methamphetamine seizures within 3,000 kilometres from Afghanistan are observed more frequently, and prices have dropped after a brief period of stability in 2024. This generates important questions around the means of the drug's manufacture, its sourcing, and the underlying market forces. Although the De facto Authorities continue to report seizures of ephedra and ephedrine, such efforts have had no apparent effect on methamphetamine's availability in regional drug markets.

Declining opiate seizures, increasing methamphetamine seizures

In line with potential opium production estimates in Afghanistan, seizure data indicates declines for opiates toward the end of 2024. The availability of opium in the market appears uninterrupted a few months after the DfA took over and started to decline only more recently after the second half of 2023. In contrast, the frequency of opium seizures saw an initial decline that was followed by a 50% increase into the first two quarters of 2023, relative to the third quarter of 2021. Opium seizure events returned to baseline levels by the third quarter of 2023 and remained steady until falling to about two-thirds baseline levels by the end of 2024.

Interestingly, prohibitions on drug production or their enforcement in Afghanistan have not had any negative effect on methamphetamine seizure frequency. Relative to the third quarter of 2021, methamphetamine seizures within 3,000 kilometres from Afghanistan have continued to increase in frequency, peaking at 2.5 times baseline levels at the end of 2023. Seizure events declined slightly and by the end of 2024 were about 50% higher relative to the third quarter of 2021.

FIGURE 16 COUNT OF DRUG SEIZURES INDEXED TO 2021 Q3. OBSERVATIONS WITHIN 3000KM FROM AFGHANISTAN

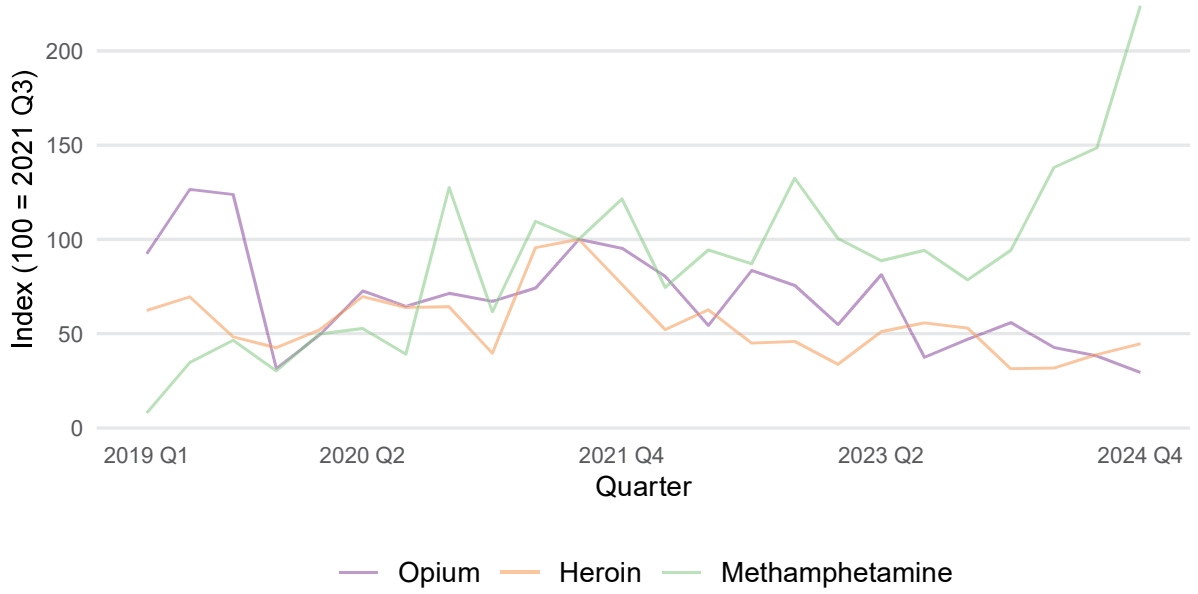


Observations below 0.1kg are removed
Data from UNODC Drugs Monitoring Platform

Comparing average seizure weights, there is a similar downward trend for opiates relative to the third quarter of 2021. As shown below, average opium and heroin seizure weights have fallen by about half and have remained relatively steady.

In contrast, average methamphetamine seizure weights remain relatively flat until the second quarter of 2024 where they started to increase substantially. By the end of 2024 average seizure weights for methamphetamine were more than twice the weight as they were relative to the third quarter of 2021. This would suggest that methamphetamine supply remains almost completely unaffected by the recent bans on drugs in Afghanistan. This may point to substantial methamphetamine production capacity within the country, resilient means of production, or potentially other large-scale manufacture outside of Afghanistan.

FIGURE 17 AVERAGE WEIGHT OF DRUG SEIZURES INDEXED TO 2021 Q3. OBSERVATIONS WITHIN 3000KM FROM AFGHANISTAN.



Observations below 0.1kg are removed
Data from UNODC Drugs Monitoring Platform

Taken together, the seizure data suggest that opiate trafficking has declined since mid-to-late 2021. As of the end of 2024, there were approximately half as many opiate seizures as when the DfA returned to power, and those seizures weighed, on average, about half as much as in the third quarter of 2021. This downward trend was most pronounced for heroin, which is seized around 50% less frequently than before.

Methamphetamine seizures have become more frequent and average weights have remained increased. While seizure data alone is difficult to interpret, when considered alongside recent production estimates, it is likely that opiate supplies are declining, while the situation with methamphetamine appears to remain stable or expanding.

Price data as indicator for possible opiate production outside of Afghanistan

Since the beginning of systematic monitoring in 1994, opium and heroin prices have largely followed the laws of supply and demand. In years of high production, prices tended to decline, while supply shocks or periods of reduced output were typically followed by upward price trends. Similar to legal commodities, prices also responded to anticipated market developments. For example, in 2021 -the year the DfA came to power - opium prices spiked, reflecting market reactions to the announcement by the De facto Authorities of their intention to enforce a nationwide drug ban.

Supply with opium and heroin originating in Afghanistan sharply reduced since 2023. As expected, this led to a spike in prices with some normalisation afterwards. Monthly wholesale heroin prices in Afghanistan rose significantly from their longstanding pre-ban average of around US$2,200 per kilogram. Following the announcement of the drug ban, prices initially fell to just under US$1,700 in mid-2022, before sharply increasing to over US$6,000 per kilogram by the first half of 2024. For opium, prices have also generally tracked quantities produced.

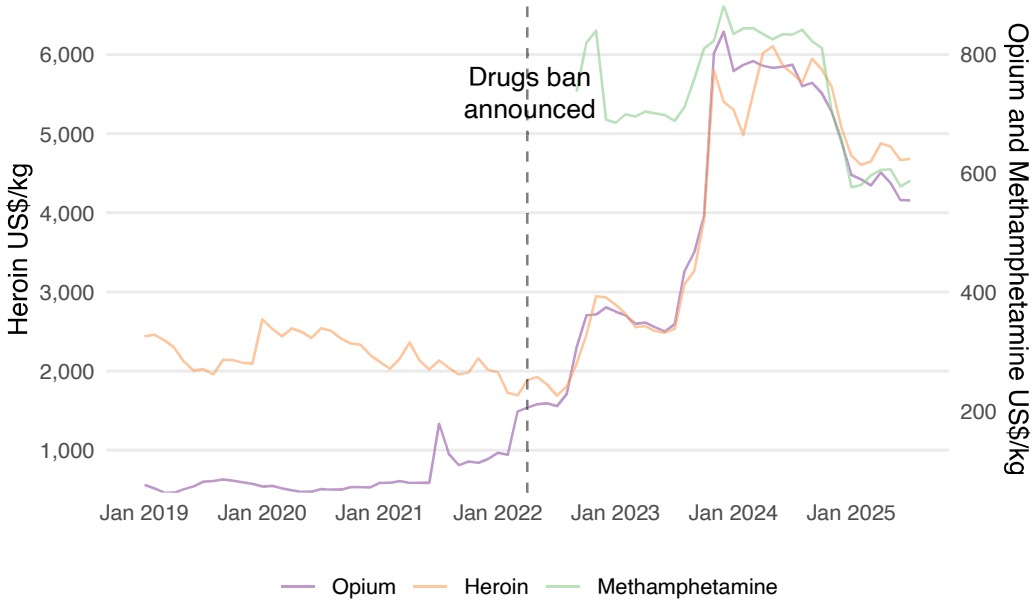
However, this trend ended at the beginning of the 2024/2025 agricultural year (October/November in the South and South-west of Afghanistan), when farmers decided whether or not to cultivate opium poppy. Relative to last year's peaks, prices in 2025 have trended downward despite sustained reduction in opium supply from Afghanistan and considering the fairly inelastic nature of demand for opiates.

This downward price trend may therefore reflect several underlying market dynamics, which may all play a role to varying degrees. The recent price movements could indicate a market normalization following the initial shock of the ban. Alternatively, the decline may signal accelerated selling of stockpiles by traders. Another possibility is the emergence or expansion of opiate production outside Afghanistan, which could be contributing to increased availability and subsequent downward pressure on prices.

The sustained high prices might have triggered opium cultivation in countries in the immediate region. For instance, according to official data submitted to UNODC eradication of opium poppy in two countries near Afghanistan increased from 5,868 hectares in 2022 to 13,200 in 2023 (latest data available).[10] More information and close monitoring of the situation are needed to fully understand the extent to which cultivation may have shifted to countries other than Afghanistan. This shift can be seen an example of the so-called balloon effect, where enforcement in one country leads to the displacement of illegal activities to another – a phenomenon that has been observed elsewhere.[11]

The developments in opiates are contrasted by methamphetamine. UNODC's systematic monitoring of methamphetamine prices began only in late 2022, but monthly kilogram prices initially fluctuated between roughly US$600 and US$850. Beginning in late 2024, methamphetamine prices fell sharply mirroring the direction of opiate prices- dropping below US$600 per kilogram and converging toward the price range of dried opium. In this case, the price decline could reflect either an increase in production capacity or greater availability stemming from inflows from other countries; at present, neither dynamic has been conclusively verified, and both remain plausible contributors to the observed shift.

FIGURE 18 HEROIN, OPIUM AND METHAMPHETAMINE PRICES IN AFGHANISTAN, 2019-2025



Data from UNODC Afghanistan Price Monitoring

Market indicators for heroin show supply constraints outside Afghanistan

While there are indications of opium poppy cultivation outside of Afghanistan, pre-ban levels of supply have not been reached, as indications for supply shortages appeared.

Drug price data provided to UNODC by member states show that the retail and wholesale prices of opium, heroin, and methamphetamine have changed relative to 2022.[12] However, raw prices alone are hard to assess as purity can vary considerably across time and space while prices may remain constant or decline in parallel with purity. Taking prices and purity into context can better appreciate changes in supply. Drug purity and price data provided to UNODC by member states show that the purity-adjusted prices of heroin have increased dramatically starting in 2024 for several major destination or transshipment markets in Europe, many of which have been traditionally supplied by heroin from Afghanistan. Across both retail and wholesale levels, the price per pure gram of heroin increased, in some cases by several factors. That said, the purity-adjusted prices for methamphetamine continue to decline in these same drug markets, albeit most European markets are supplied with methamphetamine by sources closer to end markets. Relative to 2022 levels, purity-adjusted prices for heroin experienced a doubling by 2024 in most drug markets for which data are available.

FIGURE 19 AVERAGE PURITY ADJUSTED PRICES PER PURE GRAM OF HEROIN AND METHAMPHETAMINE IN US$ IN 11 DESTINATION MARKETS IN EUROPE

Averages are not weighted.

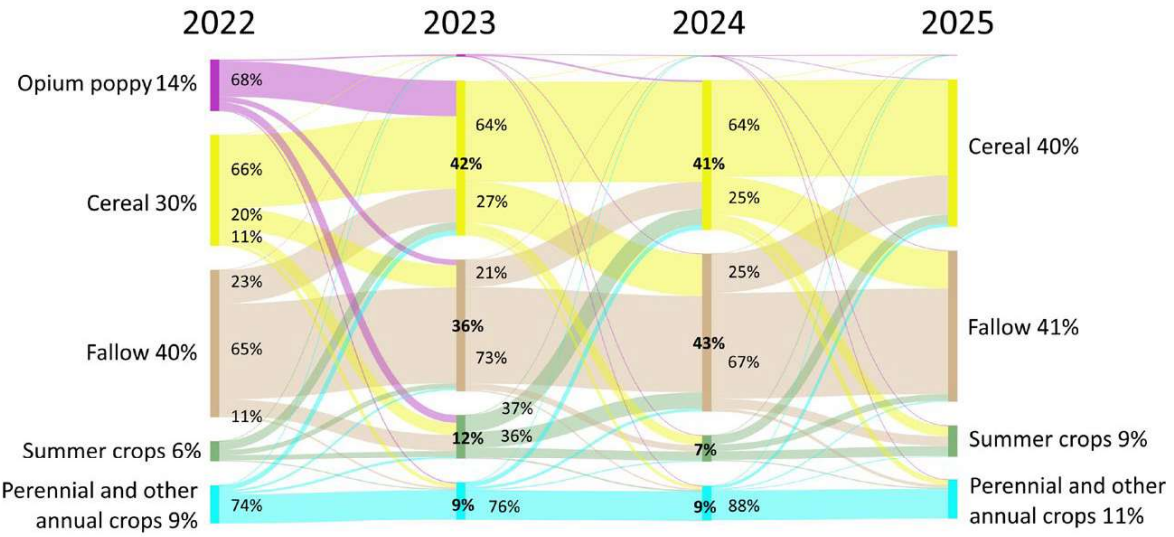
OPIUM POPPY IN THE CONTEXT OF SOCIAL AND ECOLOGICAL DEVELOPMENTS

Replacing opium: what farmers grow instead

Following the enforcement of the ban on opium poppy cultivation, the 2023 season witnessed major changes in land use. More than two-thirds of the fields once planted with opium poppy were converted to cereal cultivation, primarily wheat. The rest of the former opium poppy land was left fallow or planted with summer crops. While this transition toward cereals holds the potential to strengthen national food security, it also results in sharply reduced cash income for farmers, since opium poppy generates much higher returns per unit of land compared to wheat. As a result, those complying with the ban face considerable income losses.

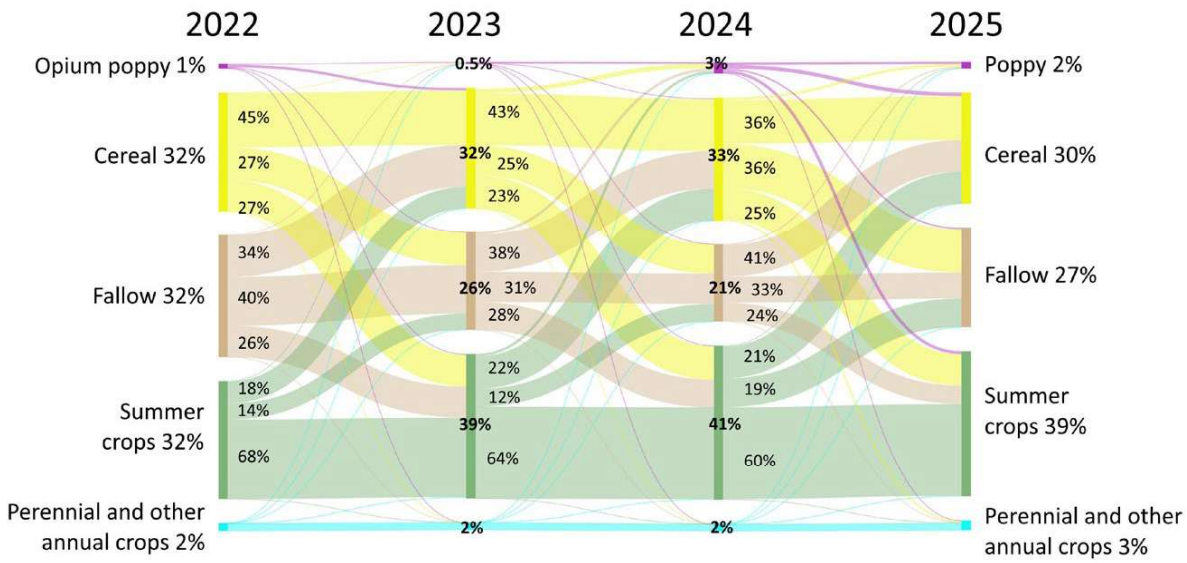
Since 2023, when the ban was first enforced, land use in the four monitored provinces which accounted for 74% of national opium poppy cultivation in 2022 (Nangarhar, Farah, Helmand and Kandahar all of them mostly irrigated) remained largely the same, with some adjustments. In 2025, the share of land devoted to cereals was slightly lower than in 2023 and 2024, likely due to adverse climatic conditions. Yet cereals remained the primary replacement crop for opium poppy cultivation. Summer crops also recorded a reduction in cultivated area when compared to 2023. Regardless of the amount of opium poppy cultivation, fallow land still made up over 40% of all farmland. This shows that farmers face ongoing difficulties in using all the agricultural land available to them.

FIGURE 20 LAND USE CHANGE IN FARAH, KANDAHAR, HELMAND, AND NANGARHAR[13]



In contrast, the province of Badakhshan has experienced a notable rise in the amount of land left fallow when compared to previous years, which to a lesser extent also affected summer crops. This expansion of unproductive agricultural land appears to be less the result of deliberate planning by farmers and more a consequence of the severe drought conditions that have affected much of the province's rainfed farmland. Water scarcity has limited farmers' ability to maintain regular crop cycles, forcing many to leave fields uncultivated or to focus whatever resources available to a smaller number of fields, leaving others to wither. At the same time, Badakhshan has registered a decline in opium poppy cultivation compared with the previous year. Nonetheless, current levels remain higher than those observed prior to the introduction of the opium cultivation ban in 2023, underscoring the province's continuing opium poppy cultivation despite this year's reduction.

FIGURE 21 LAND USE CHANGE IN BADAKHSHAN



Decline in Agricultural Land

In addition to the loss of income from opium, Afghan farmers face severe challenges due to prolonged droughts, climate change, increased rates of returnees and reduced international aid, which have led to widespread crop failures, food insecurity, and economic hardship.

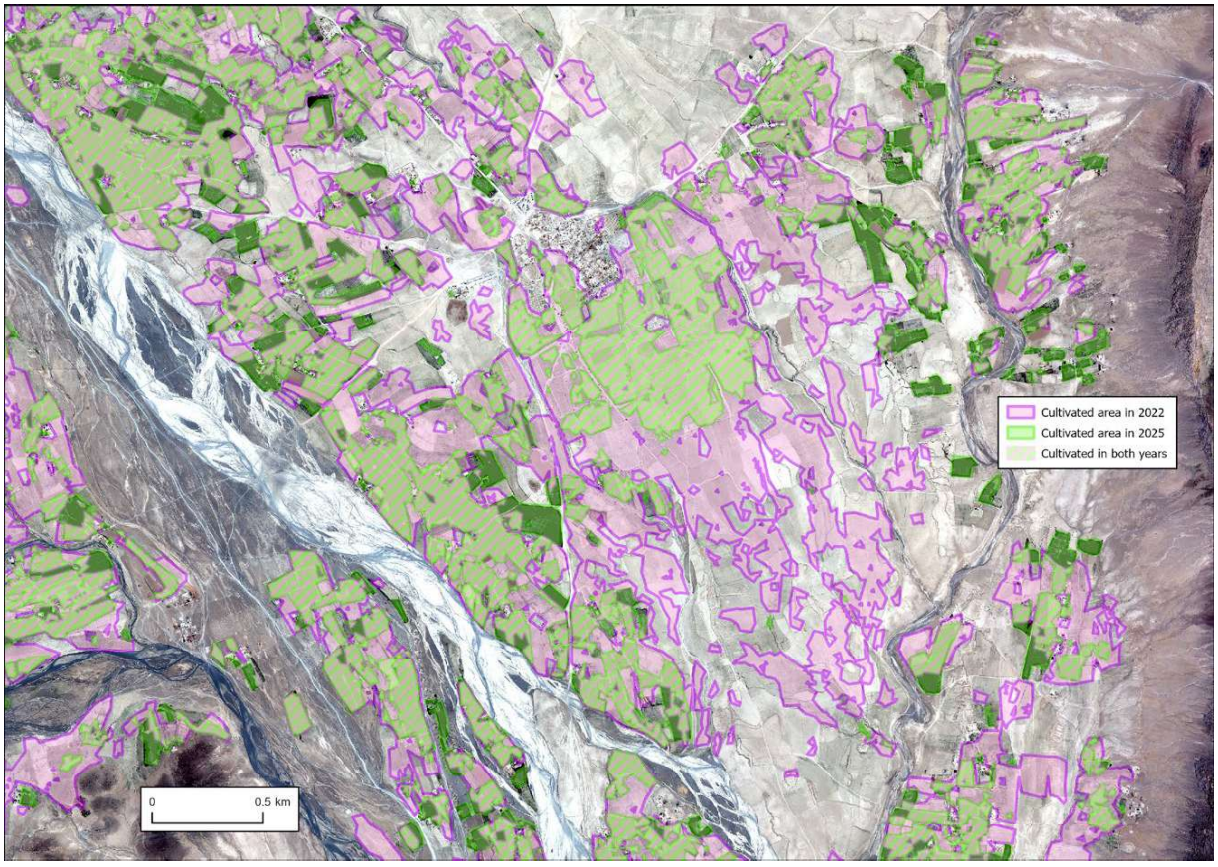
At least since 2018 Afghanistan has experienced sustained agricultural land loss driven by land degradation, desertification, and hydrological stress, shrinking productive cropland and undermining rangelands that support most rural livelihoods.[14] National assessments indicate that overgrazing, deforestation, and recurrent drought have degraded large swathes of terrain, eroding soils and reducing carrying capacity for agriculture and livestock.[15] These pressures coincide with increasingly frequent agricultural droughts since 2000 and declining groundwater tables in key basins, constraining irrigation reliability and accelerating the conversion of marginal land into low-productivity fields or abandonment where water access collapses.[16]

According to FAO household monitoring, many Afghan crop producers have reduced the area planted, primarily due to water shortages and unaffordable agricultural inputs. Irrigation is less available than in previous seasons, and recurring droughts continue to disrupt planting plans.[17] Even when seasonal outcomes are average, varying precipitation and above-average temperatures shorten planting windows and increase risk. These developments contribute to multi-year declines in sown area and yield stagnation in drought-prone provinces in many parts of the country.[18]

Loss of formerly active agricultural area occurred as well in formerly key opium-producing areas, such as Nawzad and Washer in Helmand and Bakhwa and Khak-e-Safid in Farah, lost up to 25% of their agricultural land within just three years. Much of this land had originally been made arable driven and financed by the opiate economy. However, the loss of income from opium poppy did not allow to further use these lands leading to abandonment.

Policy, demographic, and economic changes further intensify Afghanistan's agricultural land loss by changing long-standing land use patterns. Steady population growth and accelerating urbanisation in historically fertile plains has progressively absorbed productive fields into expanding urban settlements.[19] Additionally, as UNODC analysis showed,[20] the ban on opium sparked a wave of rapid land repurposing with farmers shifting to legal crops -primarily cereals. Many low-yield plots that were profitable with the cash crop opium poppy, were abandoned as cereals made continued cultivation seemingly economically unsustainable.

FIGURE 22 AGRICULTURAL LOSS IN AN AREA OF NAWZAT DISTRICT OF HELMAND



WORSENING HUMANITARIAN SITUATIONS FROM CLIMATE CHANGE, WATER MANAGEMENT AND MIGRATION IN RURAL AREAS

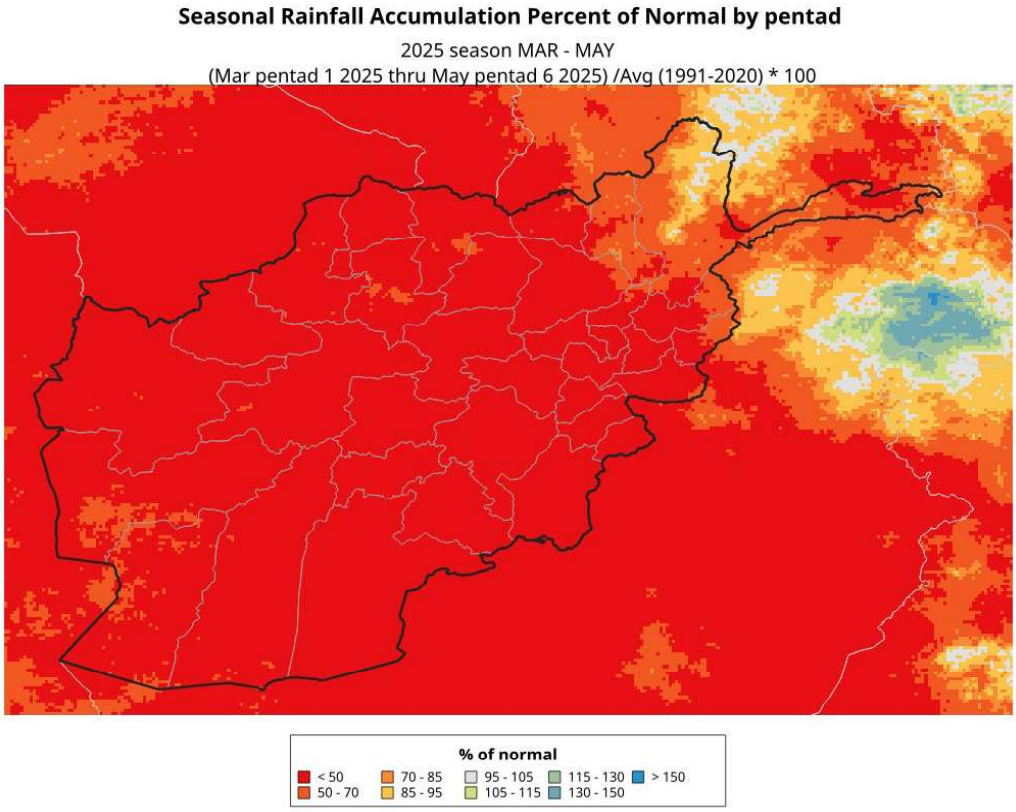
The 2024–25 season in Afghanistan has inflicted severe hardships on rural communities. Afghanistan experienced a challenging 2024-25 agricultural season due to below-average precipitation and elevated temperatures, which impacted both cereal and opium poppy cultivation.[21] The country, ranked among the most vulnerable nations to climate change, faced widespread drought conditions that particularly affected rainfed winter wheat production and less so irrigated areas.[22] Drought conditions have led to the failing of opium poppy fields, especially in rainfed areas, which may have contributed to the reduction in cultivation in 2025.

This has created intense economic pressures, particularly in regions where livelihoods depend almost exclusively on farming. A large part of Afghanistan's population already copes with food insecurity despite ongoing development efforts. While the successful wheat harvest in irrigated areas has partly compensated for rainfed production losses, overall cereal import needs for the 2024–25 marketing year are still substantial, estimated at 3.5 million tonnes.[23] This is somewhat below the long term average, yet remains a concern given Afghanistan's prevailing food insecurity, as noted by FAO, which warned that lower household incomes and reduced purchasing power continue to limit access to food.[24] The country's limited milling capacity means Afghanistan needs to continue to import wheat flour to meet basic food needs, leaving it highly vulnerable to volatility in international commodity markets. For many families, this means higher prices at a time when incomes are collapsing and purchasing power is diminishing. As agricultural opportunities dwindle, households often resort to negative coping strategies, including reducing food intake, selling off productive assets, or pulling children out of school, all of which undermine both immediate welfare and longer-term resilience.[25]

Below average rainfall and above average temperatures posed challenges to farmers in 2024-2025

Seasonal cumulative precipitation (October 2024 to May 2025) ranged from 60-75% of average in most areas,[26] with Northern, Central, and North-eastern regions experiencing the most severe deficits of 75-90% below average.[27] This precipitation shortage was compounded by consistently below-average snowpack conditions throughout the season.[28] Additionally, snow water volume (SWV) levels remained critically low across all basins, with northern and north-eastern basins reaching record minimum values throughout the 2024-25 season.[29] Most concerning was that SWV levels in several basins reached zero 4-6 weeks earlier than usual.

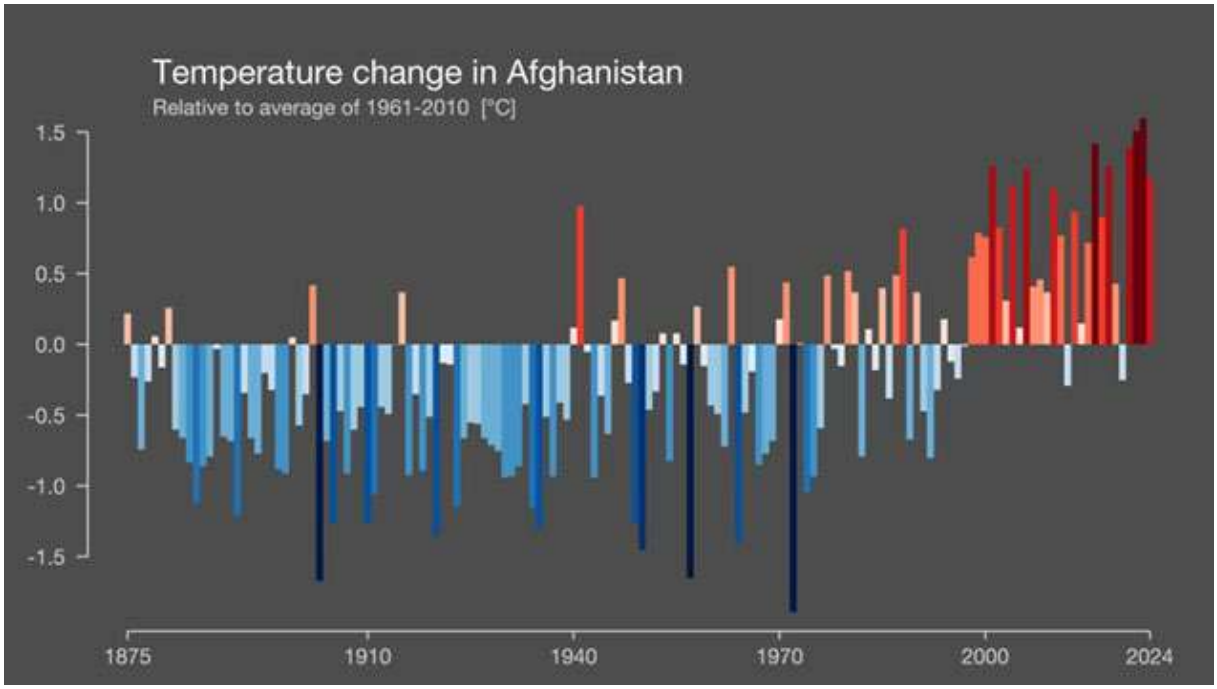
FIGURE 23 RAINFALL DEFICIT IN AFGHANISTAN, MARCH TO MAY 2025



The whole country experienced an extreme lack of rainfall, which extended and compounded the drought conditions across the country[30]

Above-average temperatures persisted throughout the season, exacerbating moisture stress conditions.[31] The combination of reduced precipitation and elevated temperatures created severe drought conditions affecting 64% of households in 2024.[32] Land surface temperatures remained above average across the country, compounding the effects of reduced rainfall and further straining water resources.[33] Soil moisture at root depth reached critically low levels in most regions, with only a few pockets in Northern and North-eastern provinces maintaining adequate moisture.[34] More importantly, such higher than average temperatures are not an outlier in the climatic series, but are becoming the new normal.

FIGURE 24 TEMPERATURE DEVIATIONS VS THE 1961-2010 MEAN IN AFGHANISTAN

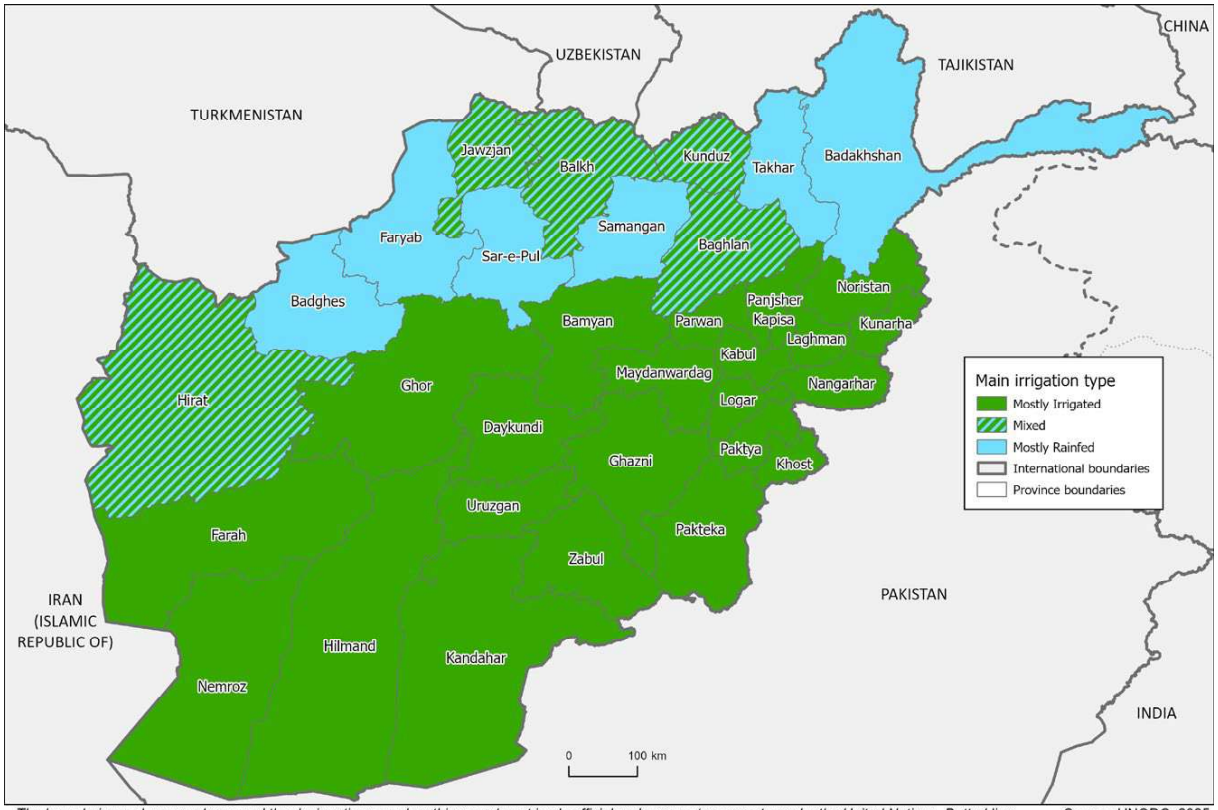


Since the year 2000 there has been a rapid increase in average temperatures across the country that affect agricultural practices and impact livelihoods and food availability[35]

A sharp contrast between irrigated and rainfed land

The 2024–25 winter cropping season, including the cultivation of opium poppy, demonstrated a sharp contrast between irrigated and rainfed land.[36] In the Eastern, Southern, and Southeastern regions, irrigated crops benefited from reliable water supply, leading to near average yields. In contrast, rainfed wheat areas and irrigated land facing water shortages in Northern, North-eastern, Western, and Central provinces experienced severe moisture stress, with significant crop losses where rainfall was the sole source of moisture.[37,38]

FIGURE 25 MAIN SOURCES OF IRRIGATION OF FIELDS IN AFGHANISTAN



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.

Source: UNODC, 2025

While the northern third of the country is more reliant on rainfall to grow their crops, in the rest of the country agriculture is predominantly irrigated[39]

Remote sensing analysis in early April 2025 corroborated field observations. Normalized Difference Vegetation Index (NDVI) imagery showed widespread below-average vegetation conditions, particularly across rainfed agricultural areas in northern and southern provinces. These patterns reinforced the assessment that drought significantly reduced crop performance on non-irrigated land.[40]

Severe drought conditions have likely impacted agricultural production in areas that depend solely on rainfall. Like other crops, opium poppies require adequate moisture for healthy growth, and widespread precipitation deficits may have reduced yields where cultivation relied exclusively on rainwater. In contrast, regions with access to irrigation systems -such as reliable canals or solar-powered pumps- were generally able to sustain normal crop development, provided sufficient water was available.

The drought has affected even traditionally irrigated areas, as some water sources dried up. In several cases, the unexpected and prolonged lack of rainfall disrupted normal agricultural practices. One consequence has been fertilizer damage to crops, including opium poppies. UNODC received reports from the field that in some areas farmers applied fertilizer as usual, but without rain to dilute and wash it into the soil, the fertilizer accumulated on the surface. Instead of supporting growth, it harmed the plants. This phenomenon, known as fertilizer burn, occurs when fertilizer salts draw moisture away from plant leaves or roots, leading to dehydration and stress.[41] Without adequate water, the nutrients build up to toxic concentrations, causing osmotic imbalance that pulls water out of plant cells. The result is leaf scorch, browning, curling, and, in severe cases, plant death.

Water resource management is more challenging due to reduced rural income

The persistent drought conditions severely impacted both surface and groundwater resources.[42] Farmers in some areas were able to mitigate rainfall deficits by accessing groundwater supplies, but this placed additional strain on already depleted aquifers.[43] The situation was particularly concerning as this marked the fifth consecutive year of farmers relying excessively on groundwater for crop production.[44] When wells must be dug deeper, the water table becomes even more depleted, requiring additional power to pump water and necessitating the use of narrower pipes, which ultimately reduce the volume of water supplied.[45]

FIGURE 26 SOLAR-POWERED WATER PUMP, BALKH PROVINCE, NOVEMBER 2024

In some water scarce areas farmers report that owning water sources enables them to earn substantial income by selling water to others

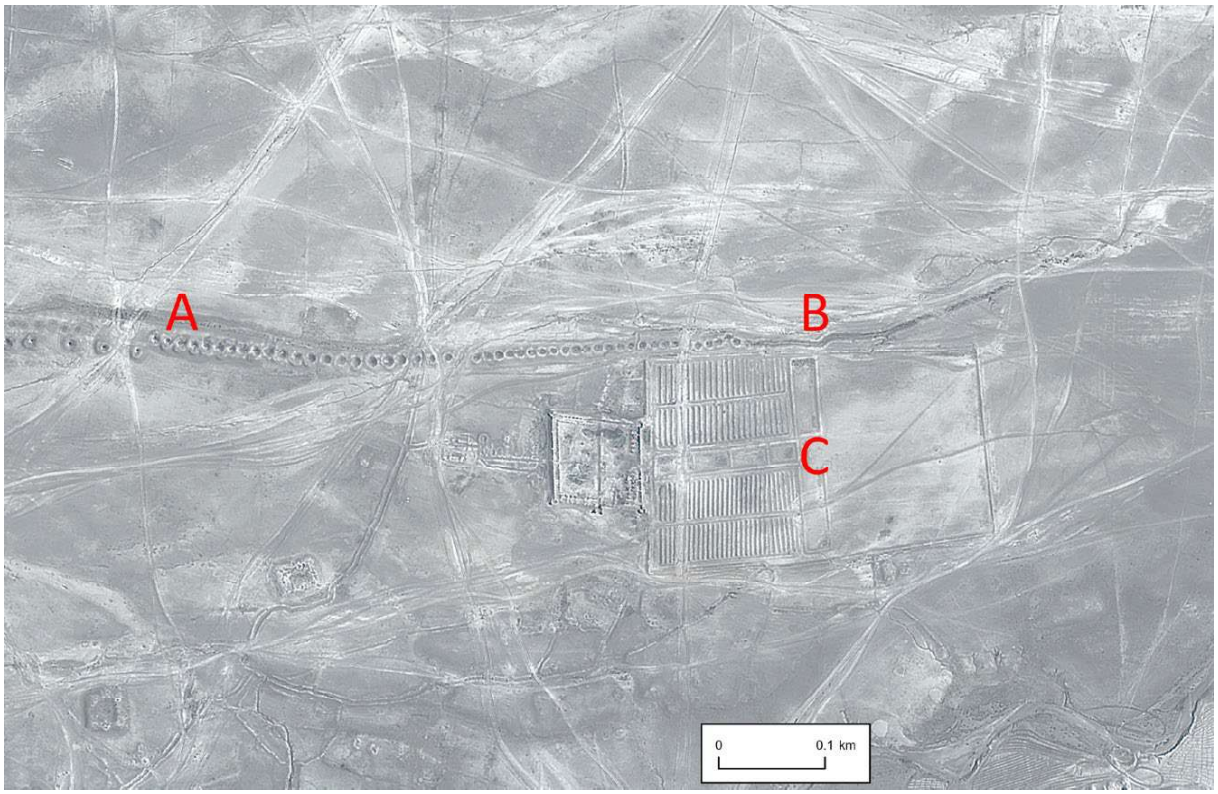
When subsurface water level goes down, other water sources in the basins can be at risk of drying up, limiting the amount of surface water available for irrigation, human use, and livestock. Early depletion of snowpack and reduced snow water volumes can have a severe impact on water availability for second-crop cultivation and summer agricultural activities,[46] potentially causing farmers to tap into new water sources and using them with implications for coming seasons.

FIGURE 27 WATER WELL DIGGING EFFORTS IN BALKH PROVINCE, NOVEMBER 2024

Source: UNODC, 2024

The ban on opium poppy cultivation, which has severely reduced the income of opium poppy farmers in many provinces, has also constrained investments in irrigation modernization as fewer economic resources are now available. Combined with prolonged water stress, this has placed unprecedented strain on the irrigation systems that have sustained Afghan agriculture for centuries and has further slowed their modernization. A prominent example is the qanat (or Karez) system, an underground network of vertical shafts and horizontal tunnels that diverts groundwater from foothills to agricultural plains while maintaining steady flows throughout wet and dry years. By limiting risks such as flooding, evaporation, and contamination, these systems have long enabled cultivation in arid and semi-arid zones. Yet, without effective water management and with groundwater tables receding to ever-greater depths, many qanats are starting to fail, leaving farmers without reliable water supplies. As irrigation systems fail, the surface of productive land continues to shrink, further pushing already vulnerable rural communities into deeper economic and food insecurity.

FIGURE 28 FAILING TRADITIONAL IRRIGATION SYSTEMS

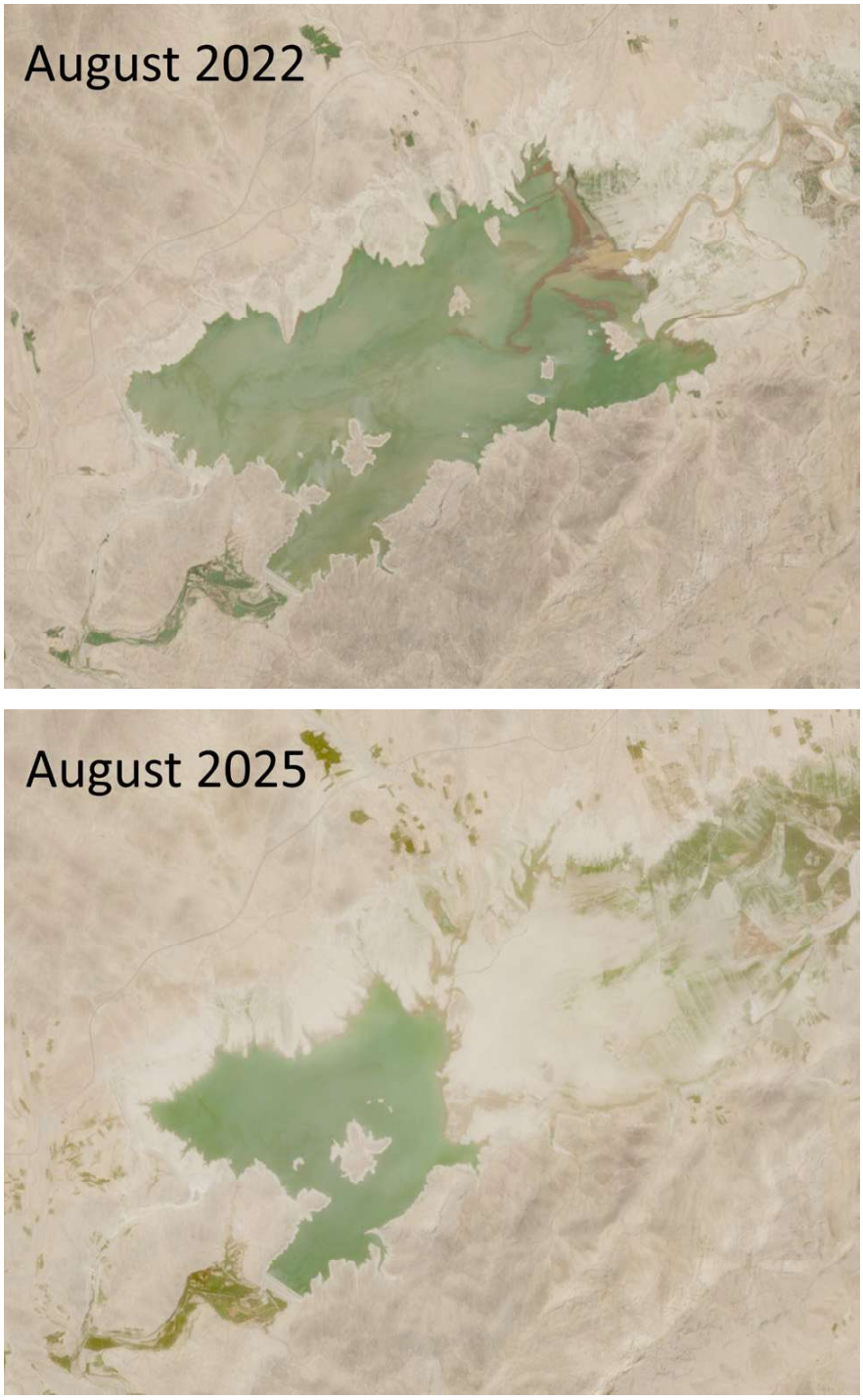


Traditional irrigation systems such as qanats (A) are failing in some areas. This leads to a lack of water in irrigation canals (B) and the reduction of available agricultural lands, which are abandoned (C).

Afghanistan is facing a severe and accelerating decline in its water tables, with both urban and rural areas experiencing significant drops in groundwater levels. The decline of Afghanistan's water tables is compounded by prolonged drought, climate change, and inadequate water management infrastructure. Consecutive years of severe drought have drastically reduced natural replenishment, while erratic rainfall and the melting of glaciers have worsened the situation,[47] with water reservoirs rapidly shrinking.

In provinces such as Farah, the water table was reported to drop by 2–3 meters annually in 2021, while traditional systems like qanats -underwater aqueducts- have dried up in 60–70 percent of cases, further exacerbating water scarcity for both drinking and irrigation.[48] While not more recent data is available, the recent dry periods point indicate that the situation is not improving, with continuing water availability concerns.[49] Concerns extend beyond subsurface water to include surface water sources such as streams, rivers, and dams, which irrigate a large share of Afghanistan's agricultural land. Kandahar, (historically one of the country's main opium-producing provinces) but now experiencing a sharp decline in production since the ban, hosts the Dahla Dam, the second-largest water reservoir in Afghanistan and a critical national infrastructure asset that has already lost 40% of its water capacity due to sedimentation.[50] In addition to supplying irrigation water to downstream farmland, the dam provides drinking water to the city of Kandahar, one of the largest urban centres in the country. Satellite imagery indicates that between August 2022 and August 2025, the volume of water stored in the dam has decreased by more than half.

FIGURE 29 THE DAHLA DAM IN KANDAHAR, AFGHANISTAN'S SECOND-LARGEST RESERVOIR AND A CRUCIAL PILLAR OF THE PROVINCE'S WATER SECURITY



The water reserve has shrunk by approximately 60% over the past three years -losing an average of 20% of its surface area annually. In addition, widespread siltation in many Afghan reservoirs is significantly reducing their storage capacity, exacerbating water scarcity challenges.
Source: Adapted from Sentinel-2 imagery (Level-2A, MSI), Copernicus ESA

Return of Afghans from neighbouring countries

The convergence of climate shocks, chronic resource shortages, limited economic opportunities, and deepening food insecurity pose severe risks to sustainable development across Afghanistan. Aggravating these dynamics, Afghanistan's key transit trade through Pakistan has seen its flow reduced.[51] This has severely restricted export options for Afghan farmers and traders, further damaging the country's economic prospects.

These challenges are further exacerbated by an unprecedented influx of returnees from neighbouring countries, many of whom arrive with limited resources to a landscape already struggling to absorb rising numbers. Since September 2023, around four million Afghans have returned from neighbouring Pakistan and Iran, with almost two million arrivals in 2025 alone.[52] This large influx of returnees, which at the current rate can soon represent a 10% population increase in the country, has overwhelmed Afghanistan's limited capacity to provide basic services and economic opportunities.[53] Many returnees are families, children and women who struggle to sustain themselves as many arrive without social networks, economic assets, or even basic documentation.[54] According to post-returnee monitoring data, 67% of returnees work as daily labourers, while 75% are currently in debt, with 95% reporting that their debt exceeds their monthly income. Half of survey respondents identified finding decent work as their major challenge upon return, with this figure rising to 58% among those returning from Iran.[55] The combination of displaced populations with limited economic alternatives increases the pressure many households face to successfully sustain their families.

FIGURE 30 RETURNEES ARRIVING IN AFGHANISTAN

Many returnees are families with women who will face legal difficulties to find work. Given the limited economic and labour options available in the country this may prove a hurdle too difficult to overcome.
Source: IOM, 2025.

Almost four million Afghans have returned to the country from Pakistan and Iran.
Source: IOM, 2025.

ENDNOTES

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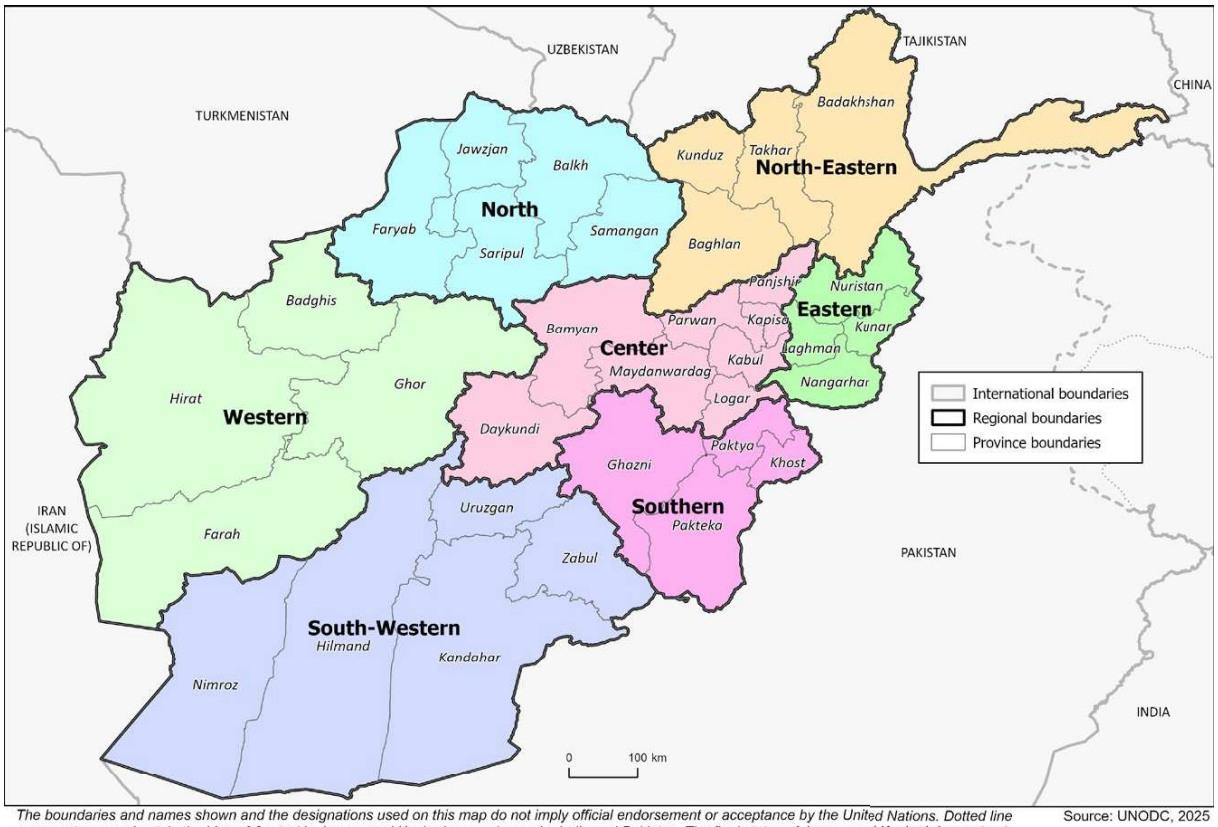
ANNEX 1: REGIONAL BREAKDOWN USED IN THE REPORT



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.

Source: UNODC, 2025

ANNEX 2: TIMELINE OF RECENT DRUG ENFORCEMENT DECREES ISSUED BY THE DE FACTO AUTHORITIES[56]

April 2022

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 March 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.

In September 2024 the High Commission for Combating Narcotics and Intoxicants in Afghanistan began its activity.[57]

ANNEX 3: VIEWS OF THE SURVEY AND ANALYSIS DIRECTORATE OF THE COUNTER NARCOTICS OF THE DEPUTY OF MINISTRY OF INTERIOR ON THE UNODC OPIUM POPPY 2025 REPORT

First of all, the Directorate of the Survey and Analysis of Narcotics thanks the esteemed UNODC office for preparing the report on opium poppy cultivation 2025 and sharing it with us and asking our views and comments on the report. The report, which contains the opium poppy cultivation and production estimation, along with other drugs-related statistics, provides information to national and international community and brings the positive message of the Islamic Emirate of Afghanistan efforts on counter narcotics to them.

The following are our views and comments sharing with UNODC office:

1. Regarding opium poppy cultivation and eradication in 2025

On Table No. 1, page 8 of the annexed report, several observations were noted:

First point:
The actual total hectare of opium poppy cultivation area in 11 provinces is 9,781 hectares, while the total in the table is 10,200 hectares which shows a difference of 419 hectares. If this difference is because of the poppy free (<100 ha) provinces, then the actual poppy cultivation of the poppy free provinces should be mentioned in the table as well so the total should match the sum-up of all figures. The same scenario can be seen in the regional total. Or the area of poppy cultivation of the poppy free provinces (419 ha) should be excluded from the total summation.

The CN deputy office sees the decrease and reduction of poppy cultivation as a big achievement across the country. The reduction has been confirmed by satellite imagery which shows that most poppy cultivation has been eradicated.

Second point:
Regarding the poppy eradication mentioned 40% (page 13, para 1) of the total poppy cultivation in 2025 was eradicated. However, this cannot be confirmed by us because the data we provided you only included eradication with GPS data while other eradicated poppy fields without GPS data was not shared with you as you asked us only for eradication with GPS data.

Poppy cultivation and Eradication 2025 / 1404			
	UNODC Office Calculations	**Calculations of the counter narcotics Directorate**	
Provinces	Poppy Cultivation/Ha	Figures of Eradicated fields by GPS	
Badakhshan	6639	1256.4	Poppy cultivated provinces
Hilmand	681	1828.1	
Badghis	573	0.1	
Kandahar	481	30.7	
Faryab	304	23.1	
Takhar	274	80.2	
Kunar	252	2.6	
Ghor	183	6.2	
Jawzjan	146	24.1	
Zabul	132	2.7	
Saripul	116	26.0	
Baghlan	0	227.5	Poppy free provinces
Farah	0	218.3	
Nangarhar	0	171.1	
Laghman	0	56.9	
Kapisa	0	25.1	
Samangan	0	19.0	
Kuduz	0	16.5	
Kabul	0	14	
Bamyan	0	12.9	
Uruzgan	0	10.8	
Balkh	0	10.5	
Hirat	0	5.6	
Parwan	0	2.6	
Khost	0	2.4	
Daykundi	0	0.6	
Ghazni	0	0.2	
Nimroz	0	0.01	
Logar	0	0	
Paktya	0	0	
Maydan Wardak	0	0	
Nuristan	0	0	
Panjshir	0	0	
Paktika	0	0	
Total	9781	4073.97	

2. Regarding opium poppy yield per hectare and farmers income from poppy sale in 2025:

The following points are to be noted:

- Opium poppy yield per hectare at regional and national level requires accurate information from the fields. Has UNOC conducted any field survey in this regard? If no, this calculation is not accurate because of use of improved seeds, drought, and other factors.
- Estimation of farmers income at regional and national levels in the country needs monthly drugs price data collection which is done by the CN deputy office on monthly basis. Have you used the drugs price data from the CN deputy office or from any other source?
- Poppy income per hectare in Hilmand is estimated as 17,000 USD and 12,000 USD in Badakhshan provinces. Also, income per hectare from wheat was estimated as 800 USD and cotton as 1,600 USD. Which source has been used to get these figures from?
- If we consider this estimation, the poppy yield per hectare in Hilmand will be 54.7 kg which is impossible. Because as per our data, the average price of one kg of fresh poppy at farmgate level in 2025 in Hilmand is estimated as 311 USD.
- In Badakhshan, as well, the price of one kilogram of poppy is 310 USD so from one hectare the yield should be 38.7 kg. While, in your estimation, poppy yield per hectare in north-east region is 30.2 kg and south-west which includes Hilmand province, 26.3 kg yield per hectare has been shown. It seems, you have used high poppy price in calculating yield per hectare.

3. Regarding the price of heroin before and after the ban on poppy cultivation:

Prices of 60% and 40% heroin crystal has been mentioned which is close to our field data. While the price of 100% heroin before the ban was more than 3,000 USD and after the ban during mid-2024, it increased to 10,000 USD.

4. Regarding methamphetamine price:

In the report, the price of methamphetamine was mentioned 600-800 USD in 2022 which is very low while according to our field data, the average price of one kg of methamphetamine in Afghanistan was more than 1000 USD.

5. Regarding fluctuation in opiates and methamphetamine (shisha) market:

- **Opiates:**

First it should be mentioned that the reason for reduction of the price of opiate (poppy) after May 2024, opium poppy cultivation increase was not much as mentioned on page 29 of the report. Means, we witness significant decrease of poppy cultivation in the country. But because of the reasons we receive from the fields on monthly basis from all over the country, reduction in poppy and heroin prices related to the following factors:

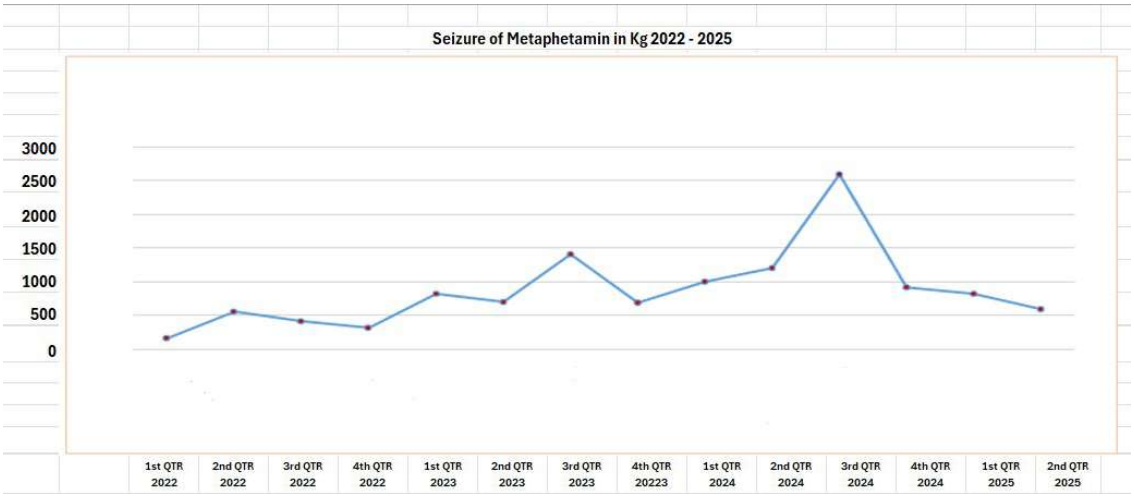
1. Collection of drugs addicts from cities
2. Law enforcement and prevention of buying and selling drugs at country level
3. Seizure of drugs and arrest of drugs suspects
4. Increase of opium poppy cultivation in neighboring countries.
5. Diversion of drugs addicts from drugs to synthetic drugs such as Table K, Pregabalin, Zicap tablet and methamphetamine.

Also, reduction in methamphetamine price, the only reason cannot be increasing production but the above factors has caused decrease in price.

Regarding methamphetamine (Shisha):

First, the reasons and factors caused production increase and usage of methamphetamine in the country to be mentioned:

- One of the reasons, is that after the ban on poppy cultivation (an edict by Supreme Leader), opium poppy and cannabis cultivation has decreased by 95% in the country. Therefore, mafia and those who involved in drugs, seek alternative ways when one way is blocked. So, they diverted to start production and business of methamphetamine from the year 2023 when Supreme Leader banned poppy cultivation. Reports indicate that seizures during the third quarter of 2024 was at maximum level and then it came down which means that by demolishing the drugs producing factories, production and business of drugs also decreased.
- The raw material of methamphetamine is called as Oman which is a natural plant grown in different regions of Afghanistan. This plant also called by the name of Ephedra which is used in production of methamphetamine. This plant contains 3-5% of ephedrine which can be used in drugs factories producing methamphetamine with the use of acids such as Acetone, Red phosphorus, Iodine, Alcohol, Toluene, Sulfuric acid, Sodium hydroxide and Hydrochloric acid.
- Since, the raw material of methamphetamine is available enough in the country, so the price is lower than other drugs and the internal and external drugs addicts now are in transitional period from poppy and heroin toward methamphetamine and synthetic drugs such as Tablet K and Tablet zicap. This is one of the reasons for the reduction in the price of poppy.



At the end, once again we express our gratitude to the esteemed office of UNODC for sharing their comprehensive, analytical, and multi-dimensional report of 2025 with us. The following points we are mentioning:

All the concerns mentioned in your report are the common concerns between you and us and the following problems mentioned in your report:

1. Drought and climate change
2. Reduction in agricultural land
3. Water resources management
4. Reduction of surface and groundwater reserves
5. Alternative crop to opium poppy
6. Joblessness and return of about four million of migrants from Pakistan and Iran from which 50% of them have no job.
7. No cultivation in 40% of agriculture land.
8. And use of agricultural land for residential purposes which has caused reduction in food security. This is a deep understanding of the country's economic and social issues.