



UNODC

United Nations Office on Drugs and Crime



**Islamic Republic of Afghanistan
Ministry of Counter Narcotics**



Afghanistan Opium Survey 2011

Summary findings

OCTOBER 2011

ABBREVIATIONS

AGE	Anti-government Elements
ANP	Afghan National Police
CNPA	Counter Narcotics Police of Afghanistan
GLE	Governor-led eradication
ICMP	Illicit Crop Monitoring Programme (UNODC)
ISAF	International Security Assistance Force
MCN	Ministry of Counter-Narcotics
SMD	Survey and Monitoring Directorate (MCN)
UNODC	United Nations Office on Drugs and Crime

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Afghanistan Opium Survey 2011

Summary Findings

October 2011

Fact Sheet, Afghanistan Opium Survey 2011¹

	2010	Change from 2010	2011
Net opium poppy cultivation (after eradication)	123,000 ha (104,000-145,000)	+7%	131,000 ha (109,000-155,000)
Number of poppy free provinces ²	20	-3	17
Number of provinces affected by poppy cultivation	14	+3	17
Eradication	2,316 ha	+65%	3,810 ha
Weighted average opium yield	29.2 kg/ha	+52%	44.5 kg/ha
Potential production of opium	3,600 mt (3,000-4,200)	+61%	5,800 mt (4,800-6,800)
Number of household involved in opium cultivation	248,700	-23%	191,500
In % of total population ³	6%		5%
Average farm-gate price (weighted by production) of fresh opium at harvest time	US\$ 128/kg	+41%	US\$ 180/kg
Average farm-gate price (weighted by production) of dry opium at harvest time	US\$ 169/kg	+43%	US\$ 241/kg
Current GDP ⁴	US\$ 12.7 billion		US\$ 16.34 billion
Total farm-gate value of opium production	US\$ 605 million	+133%	US\$ 1,407 million
In % of GDP	5%		9%
Gross income from opium per ha ⁵	US\$ 4,900	+118%	US 10,700

¹ Numbers in brackets indicate the upper and lower bounds of the estimation range.

² Poppy-free provinces are those which are estimated to have less than 100 ha of opium cultivation.

³ Based on a population of 24.5 million for 2010 and 25.0 million for 2011 and an average household size of 6.2 and 6.3 persons, respectively. Source: Government of Afghanistan, Central Statistical Office.

⁴ Relation to nominal GDP of the respective year. Source: Government of Afghanistan, Central Statistical Office.

⁵ Income figures are indicative only as they do not include all expenditure and income components associated with opium cultivation.

SUMMARY FINDINGS

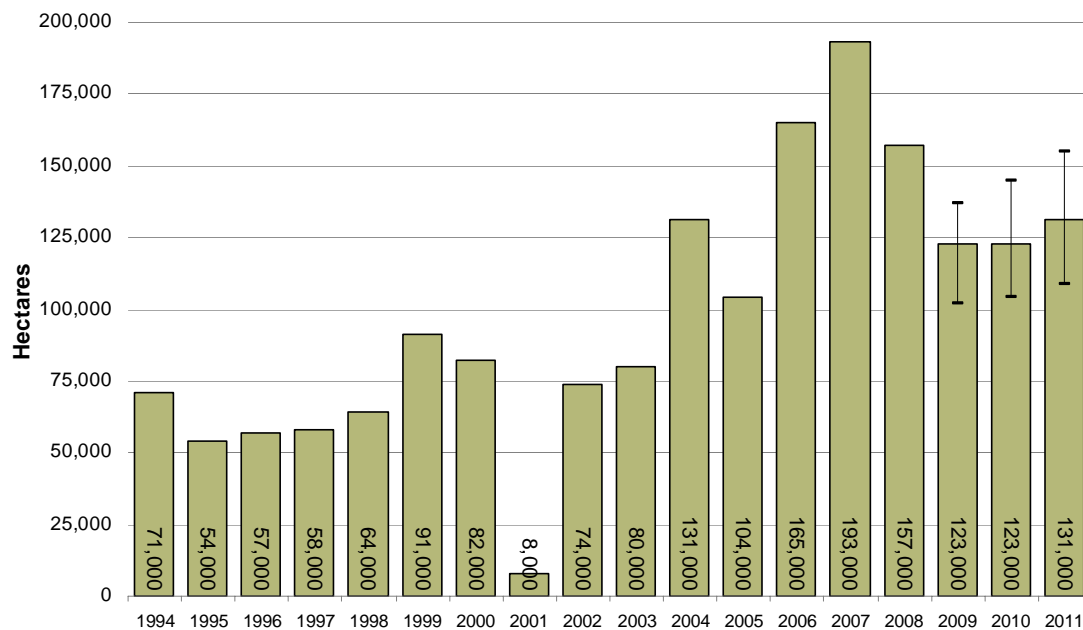
Overview

The total area under opium poppy cultivation in Afghanistan in 2011 was estimated at 131,000 hectares (ha), a 7% increase compared to 2010. 95% of total cultivation took place in nine provinces in the Southern and Western regions⁶, which include the most insecure provinces in the country. This confirms the link between insecurity and opium cultivation observed since 2007.

The number of poppy-free provinces decreased from 20 in 2010 to 17 in 2011 as Baghlan and Faryab provinces in the Northern region and Kapisa province in the Eastern region lost their poppy-free status.

Potential opium production in 2011 was estimated at 5,800 mt, a 61% increase compared to 2010, when opium yields were much reduced due to plant diseases.

Figure 1: Opium cultivation in Afghanistan (ha), 1994-2011



Source: UNODC (1994-2002), MCN/UNODC (since 2003). The high-low lines represent the upper and lower bounds of the 95% confidence interval.

⁶ Regions as designated by UNODC for analytical purposes. Please refer to Table 1 for a full list.

Table 1: Opium cultivation (2006-2011) and eradication (2010-2011) in Afghanistan

PROVINCE	Cultivation 2006 (ha)	Cultivation 2007 (ha)	Cultivation 2008 (ha)	Cultivation 2009 (ha)	Cultivation 2010 (ha)	Cultivation 2011 (ha)	Change 2010-2011 (%)	Eradication in 2010 (ha)	Eradication in 2011 (ha)
Kabul	80	500	310	132	152	220	+45%	0.48	80
Khost	133	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Logar	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Paktya	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Panjshir	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Parwan	124	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Wardak	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Ghazni	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Paktika	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Central Region	337	500	310	132	152	220	45%	0.48	80
Kapisa	282	835	436	Poppy-free	Poppy-free	181	NA	1	5
Kunar	932	446	290	164	154	578	+275%	0	1
Laghman	710	561	425	135	234	624	+166%	10	21
Nangarhar	4,872	18,739	Poppy-free	294	719	2,700	+276%	16	61
Nuristan	1,516	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Eastern Region	8,312	20,581	1,151	593	1,107	4,082	269%	27	89
Badakhshan	13,056	3,642	200	557	1,100	1,705	+55%	302	367
Takhar	2,178	1,211	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	12	0
Kunduz	102	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
North-eastern Region	15,336	4,853	200	557	1,100	1,705	55%	314	367
Baghlan	2,742	671	475	Poppy-free	Poppy-free	161	NA	0	31
Balkh	7,232	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Bamyan	17	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Faryab	3,040	2,866	291	Poppy-free	Poppy-free	145	NA	0	2
Jawzjan	2,024	1,085	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Samangan	1,960	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Sari Pul	2,252	260	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	0
Northern Region	19,267	4,882	766	Poppy-free	Poppy-free	305	NA	0	34
Hilmand	69,324	102,770	103,590	69,833	65,045	63,307	-3%	1,602	1,940
Kandahar	12,619	16,615	14,623	19,811	25,835	27,213	+5%	0	287
Uruzgan	9,703	9,204	9,939	9,224	7,337	10,620	+45%	15	154
Zabul	3,210	1,611	2,335	1,144	483	262	-46%	0	85
Day Kundi	7,044	3,346	2,273	3,002	1,547	1,003	-35%	0	235
Southern Region	101,900	133,546	132,760	103,014	100,247	102,405	2%	1,617	2,701
Badghis	3,205	4,219	587	5,411	2,958	1,990	-33%	0	36
Farah	7,694	14,865	15,010	12,405	14,552	17,499	+20%	198	212
Ghor	4,679	1,503	Poppy-free	Poppy-free	Poppy-free	Poppy-free	NA	0	43
Hirat	2,287	1,525	266	556	360	366	+2%	159	227
Nimroz	1,955	6,507	6,203	428	2,039	2,493	+22%	0	20
Western Region	19,820	28,619	22,066	18,800	19,909	22,348	12%	357	539
Total (rounded)	165,000	193,000	157,000	123,000	123,000	131,000	7%	2,316	3,810

A province is defined as poppy-free when it is estimated to have less than 100 ha of opium cultivation. Due to administrative boundary changes, estimates for Farah and Nimroz for 2009 and later were calculated considering parts of Khash Rod district, the main opium cultivating district in Nimroz, as being in Farah province. Figures for 2008 and before include all of Khash Rod district in Nimroz province. Source: MCN/UNODC.

Opium cultivation in 2011 increased by 7%

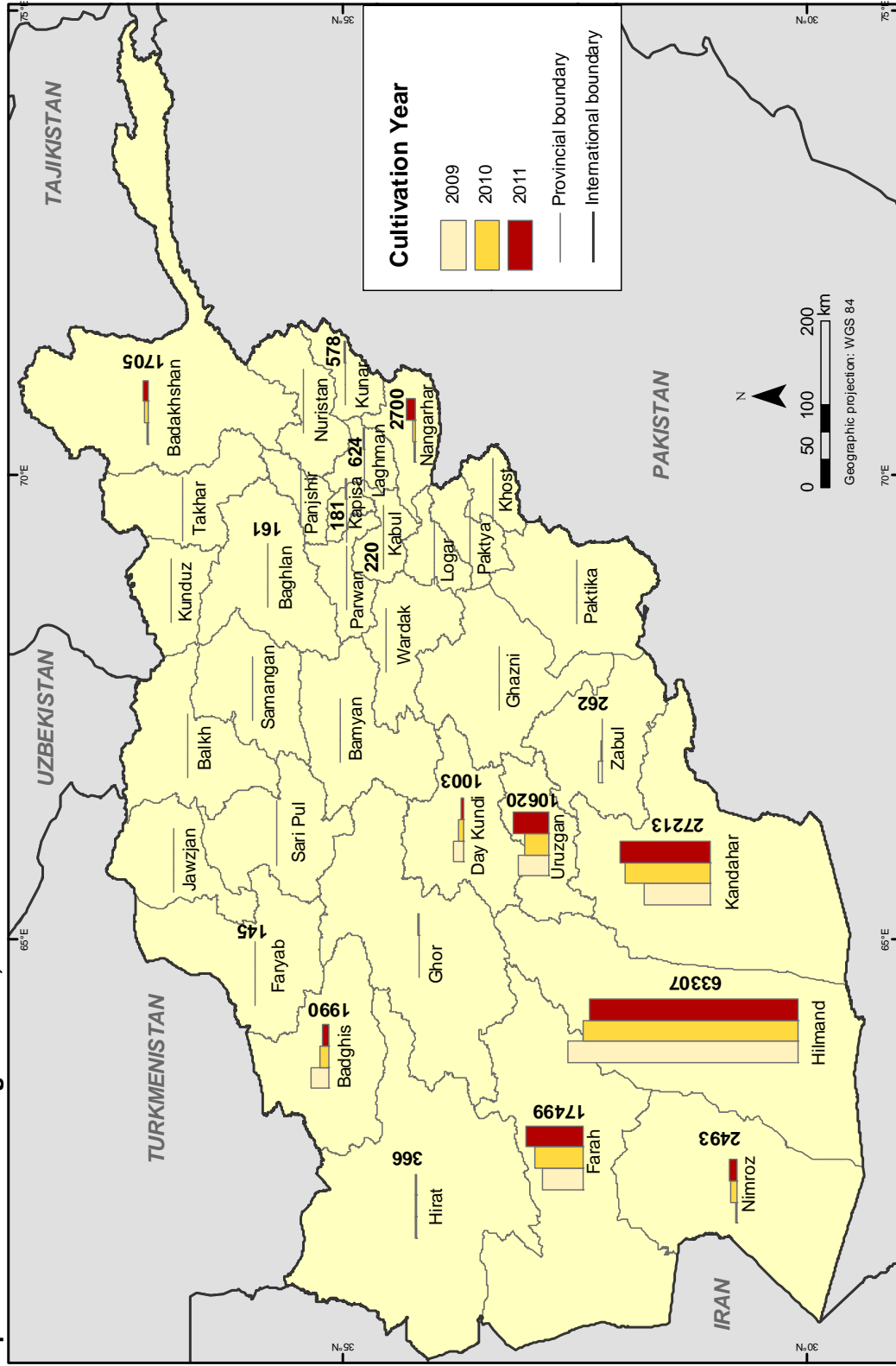
There was slight increase in the level of opium cultivation between 2010 and 2011 as opium cultivation was estimated at 131,000 ha in 2011.

95% of the opium cultivation remained concentrated in the Southern and Western regions. Within these regions significant changes occurred. Cultivation decreased in some of the main opium poppy growing provinces (Badghis, Day Kundi, Zabul) and increased in others (Farah, Kandahar, Nimroz, Uruzgan). Opium cultivation in Hilmand and Hirat provinces remained stable with a small, statistically not significant decrease of 3% and 2% respectively. The Northern region lost its poppy free status which it had reached in 2009. Starting from a low level, increases also occurred in the Eastern region where opium cultivation increased significantly in Kunar, Laghman and Nangarhar provinces. The increase in this region was very large in percentage terms (+269%) but small in absolute terms, as the Eastern region contributed only 1% to the national total in 2011.

In Hilmand, opium cultivation decreased by 3% but it remained the largest opium cultivating province. Diverging trends were observed within the province. The central part of Hilmand (Marja, Lashkar Gah, Nawa-i-Barukzayi and Garm Ser districts) witnessed massive reduction in opium cultivation in 2011 mainly due to the implementation of comprehensive counter narcotics strategies by the Ministry of Counter Narcotics and the Governor of Hilmand province. The district of Marja, which is located south of Nad Ali district, had substantial opium cultivation in the past, but only negligible cultivation in 2011. Similarly, the northern part of Garm Ser district experienced a strong decline in opium cultivation. The strong reduction in the opium cultivation in central Hilmand was partly compensated by an increase in cultivation in the northern and southern parts of the province.

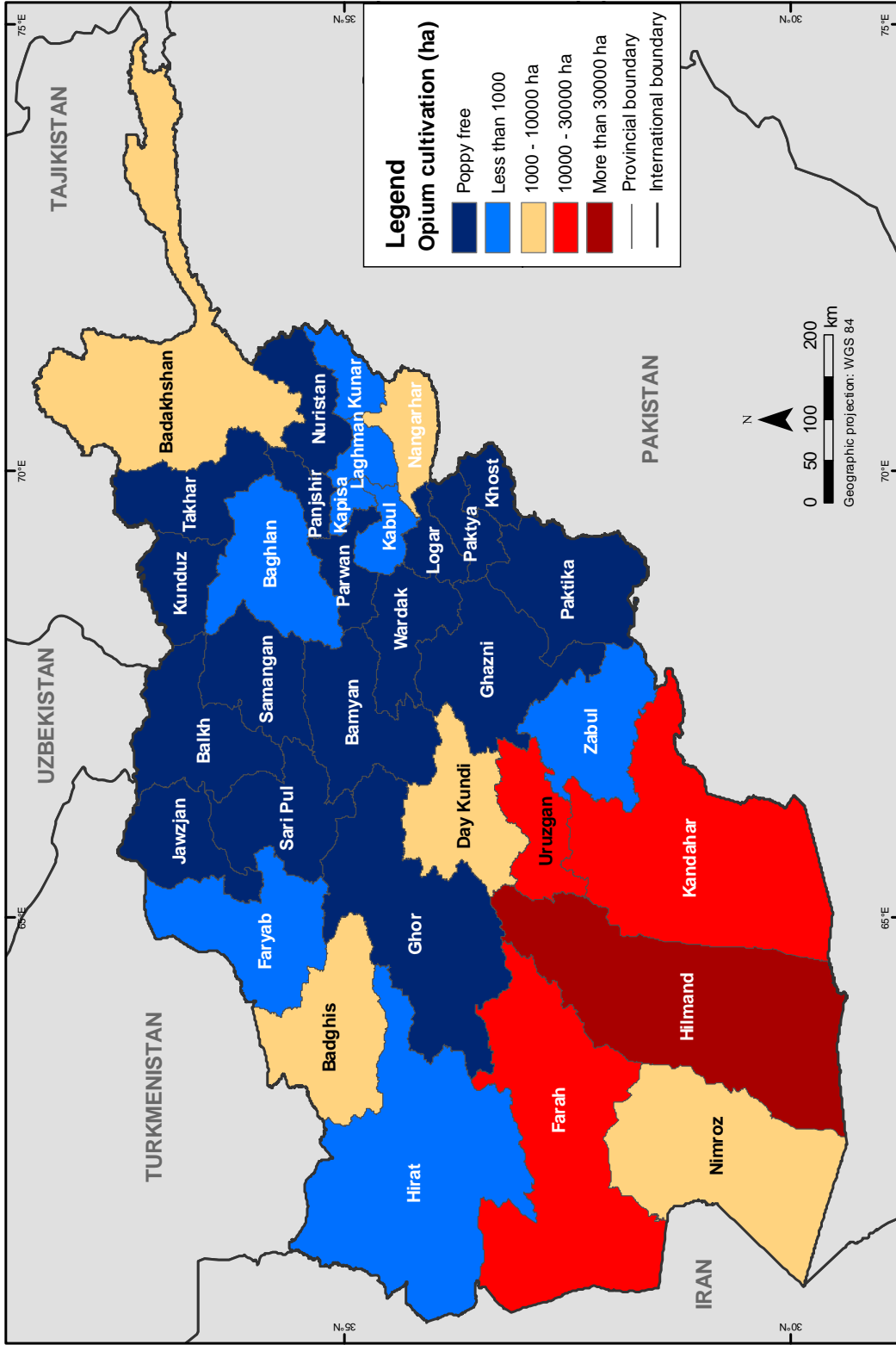
By and large, the regional divide of opium cultivation between the South and rest of the country continued to exist in 2011. Most of the opium cultivation remained confined to southern and south-western provinces, which are dominated by insurgency and organized criminal networks.

Opium cultivation in Afghanistan, 2009-2011



Source: Government of Afghanistan - National monitoring system implemented by UNODC
 Note: The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations.

Opium cultivation in Afghanistan, 2011 (at province level)



Source: Government of Afghanistan - National monitoring system implemented by UNODC
 Note: The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations.

Poppy-free provinces in 2011

Out of 20 provinces which were poppy-free in 2010, 17 continued to be poppy-free in 2011. Two provinces in the Northern region (Baghlan and Faryab) and one province in the Eastern region (Kapisa) lost their poppy-free⁷ status in 2011. However, the level of cultivation in these provinces remained very low and was only little above the 100 ha threshold that defines the poppy-free status.

Table 2: Provinces with poppy-free status in 2011 (<100 ha opium poppy cultivation)

Region	Province
Central region	Khost, Logar, Paktya, Paktika, Panjshir, Parwan, Wardak, Ghazni
Northern region	Balkh, Bamyan, Jawzjan, Samangan, Sari Pul
North-eastern region	Kunduz, Takhar
Eastern region	Nuristan
Western region	Ghor

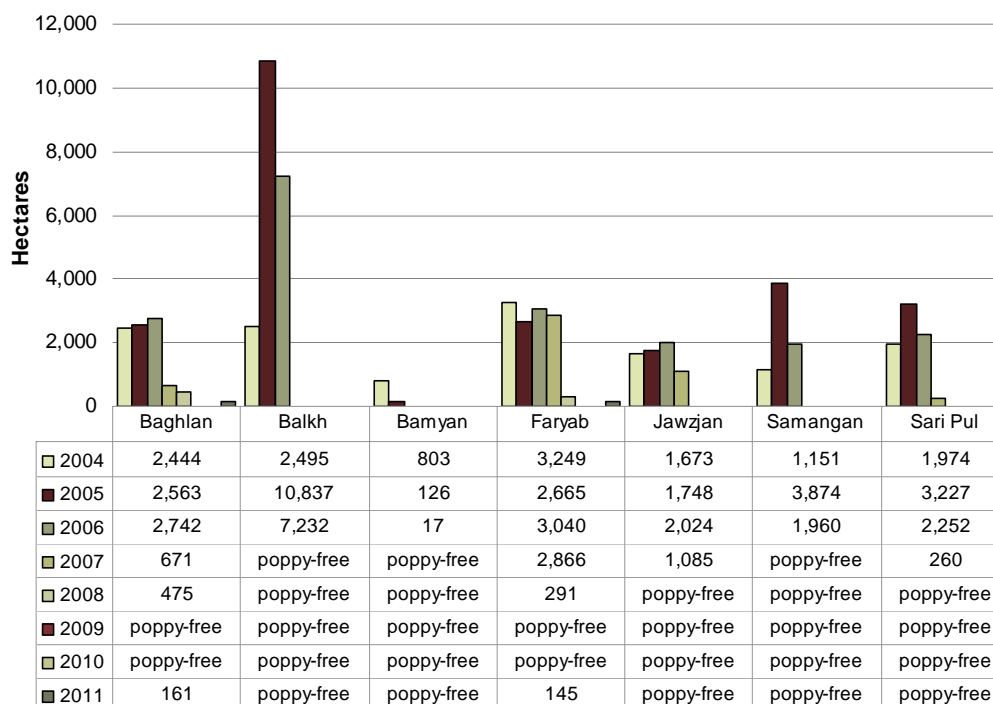
Northern region lost its poppy-free status

The Northern region consists of Baghlan, Balkh, Bamyan, Faryab, Jawzjan, Samangan and Sari Pul provinces. Two of these provinces, Baghlan and Faryab, lost their poppy-free status in 2011.

The Northern Region has been poppy-free in 2009 and 2010. However, it had been poppy cultivation, but in 2005 cultivation started to decline because of strict law enforcement and counter-narcotic initiatives. In 2008, poppy cultivation in these provinces was already negligible. With the deteriorating security situation, poppy cultivation started again in 2011. Figure 2 shows the estimated opium poppy cultivation in Northern region by province for 2004-2011.

⁷ A province is defined as poppy-free when it is estimated to have less than 100 ha of opium cultivation.

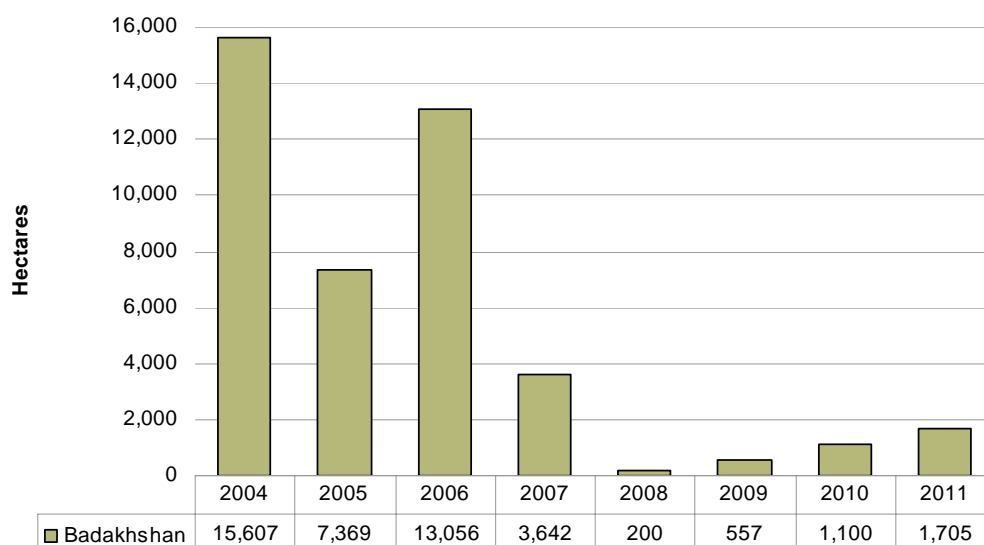
Figure 2: Opium poppy cultivation in the Northern region by province (ha), 2004-2011



Badakhshan remained the only opium poppy cultivating province in the North-eastern region

In the North-eastern region, Kunduz province has been poppy-free since 2007 and Takhar province since 2008. In 2009, 2010 and 2011 Badakhshan, where in 2011 73% of opium poppy cultivation happened in rain-fed areas, remained the only opium cultivating province in this region. Compared to cultivating provinces in the South and West, the 2011 opium poppy cultivation in Badakhshan remained low at 1,705 ha, although this represents a large increase (55%) from 2010. The increase happened despite the eradication of 367 ha.

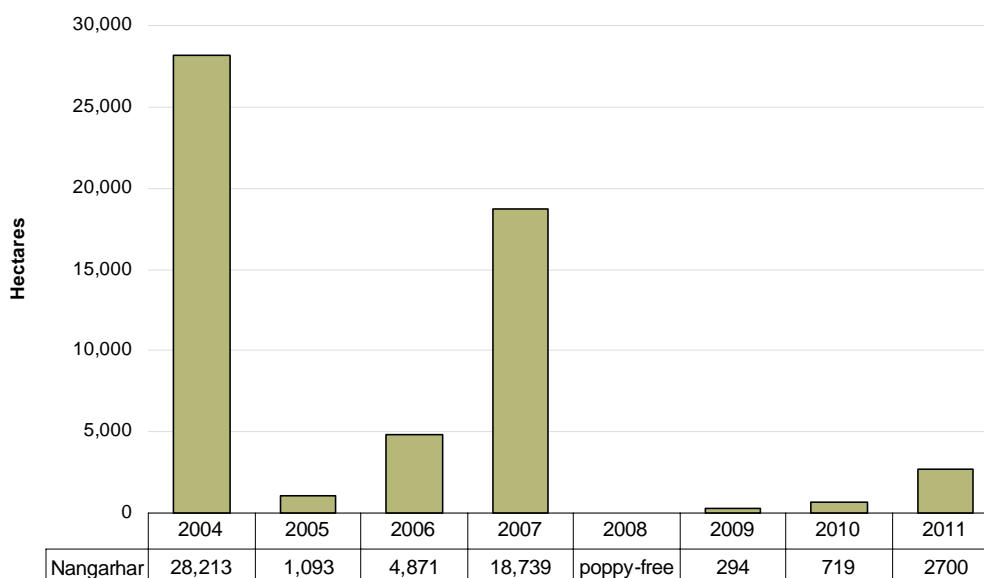
Figure 3: Opium poppy cultivation in Badakhshan province (ha), 2004-2011



Opium cultivation continued to increase in Nangarhar

Nangarhar province became poppy-free for the first time in 2008. Since 2009 opium poppy levels increased again. In 2010 and 2011, opium cultivation continued to increase and reached 719 ha and 2,700 ha respectively. Considering that Nangarhar was traditionally a large opium growing province, the area estimated in 2011 is comparatively moderate, despite a relative increase of 276% when compared to 2010. Due to strong resistance by AGE against eradication in 2010 and 2011, only 16 ha and 61 ha of opium poppy cultivation could be eradicated in Nangarhar province respectively.

Figure 4: Opium cultivation in Nangarhar province (ha), 2004-2011



Before 2008, the estimated levels of opium cultivation in Nangarhar province were erratic. In 2004, cultivation was at 28,213 ha, the following year it dropped drastically to 1,093 ha and was confined to remote parts of the province. In 2006, it increased again to 4,872 ha and in 2007 further increased to 18,739, before becoming poppy free in 2008.

Kapisa, Kunar and Laghman

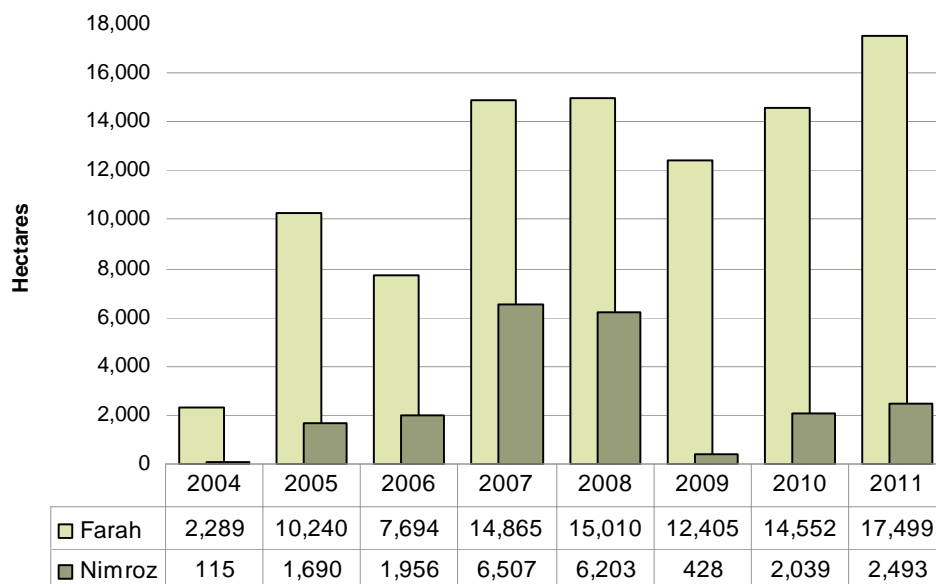
Kapisa province in the Eastern region, maintained its low level opium cultivation from 2005 till 2008. In 2009, Kapisa became poppy-free and remained so in 2010 as well. However, in 2011, Kapisa lost the poppy-free status with (181 ha) of opium cultivation.

In 2010, Kunar province in the Eastern region was very close to be poppy-free with negligible amounts of cultivation (154 ha). In 2011, there was a significant increase (275%) in the level of opium cultivation (578 ha) in Kunar province. In Laghman province, opium cultivation also increased significantly, from 234 ha in 2010 to 624 ha in 2011.

Farah remains the main opium cultivating province in the Western region

Trends in opium cultivation levels in Farah province have often been irregular. In 2008 it reached its highest cultivation level (15,010 ha). In 2009, there was a 17% decrease while in 2010, opium cultivation increased by 17%, reaching almost the same level of 2008. In 2011, there was further increase of 20% in opium cultivation (17,499 ha). Farah is the most insecure province in the Western region. In 2011, Nimroz became the second largest opium cultivating province in region.

Figure 5: Opium cultivation in Farah and Nimroz provinces (ha), 2004-2011



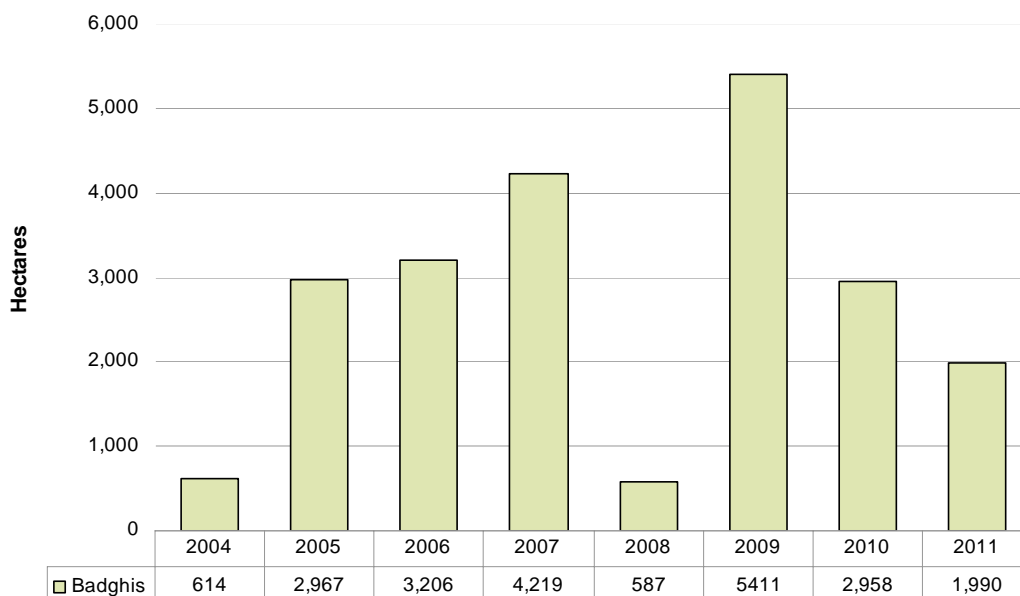
Note: Due to administrative boundary changes, estimates for Farah and Nimroz for 2009 and later were calculated considering parts of Khash Rod district, the main opium cultivating district in Nimroz, as being in Farah province. Figures for 2008 and before include all of Khash Rod district in Nimroz province.

Badghis poppy cultivation decreased and remained stable in Hirat

Opium cultivation level in Badghis province rose steadily between 2004 – 2009 with the exception of 2008 when a drought and the total failure of rain-fed crops contributed to the drop in opium cultivation. In 2010, opium cultivation decreased by 45% to 2,958 ha. In 2009, good rainfall had resulted in extensive cultivation in rain-fed areas. This had contributed to a strong increase in opium cultivation from only 587 ha in 2008 to 5,411 ha in 2009, most of which was in areas difficult to access. In 2011, there was a further decrease (33%) in opium cultivation (1,990 ha) in Badghis province.

Opium cultivating levels in Hirat province continued to be comparatively low with 366 ha in 2011, practically the same amount as the year before (360 ha).

Figure 6: Opium cultivation in Badghis province (ha), 2004-2011



Opium cultivation in Hilmand decreased by 3%

In 2011, 78% of the Afghan opium cultivation was concentrated in the Southern region. Opium cultivation in Hilmand went down by 1,738 ha or 3% compared to 2010, a decrease which is statistically not significant. Hilmand remained the largest opium cultivating province with 63,307 ha (48% of total opium cultivation in Afghanistan).

Kandahar province, Hilmand’s neighbour to the east, experienced an opposite trend. Here, opium cultivation has been increasing since 2007. In 2010, opium cultivation in Kandahar reached almost 26,000 ha, representing 21% of national cultivation. In 2011, opium cultivation in Kandahar province increased by 5% reaching 27,213 ha. Kandahar continues to be the second largest opium cultivating province after Hilmand.

Uruzgan province shows the strongest increase in this region from 7,337 ha in 2010 to 10,620 ha in 2011 (45%), and remains the third largest opium cultivating province in the Southern region.

Figure 7: Opium cultivation in Hilmand, Kandahar and Uruzgan provinces (ha), 2005-2011

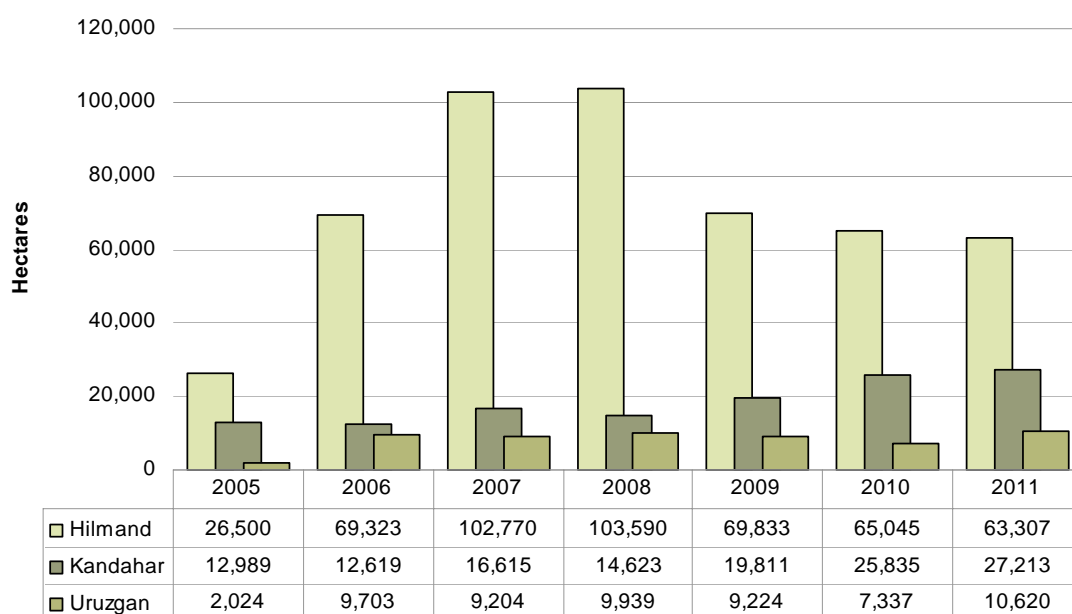


Table 3: Regional distribution of opium cultivation (ha), 2010-2011

Region	2010 (ha)	2011 (ha)	Change 2010-2011 (%)	2010 (ha) as % of total	2011 (ha) as % of total
Southern	100,247	102,405	2%	82%	78%
Western	19,909	22,348	12%	16%	17%
Eastern	1,107	4,082	269%	0.9%	3%
North-eastern	1,100	1,705	55%	0.9%	1%
Central	152	220	45%	0.1%	0.2%
Northern	Poppy free	305	NA	NA	0.2%
Rounded Total	123,000	131,000	7%	100%	100%

Table 4: Main opium cultivating provinces in Afghanistan (ha), 2007-2011

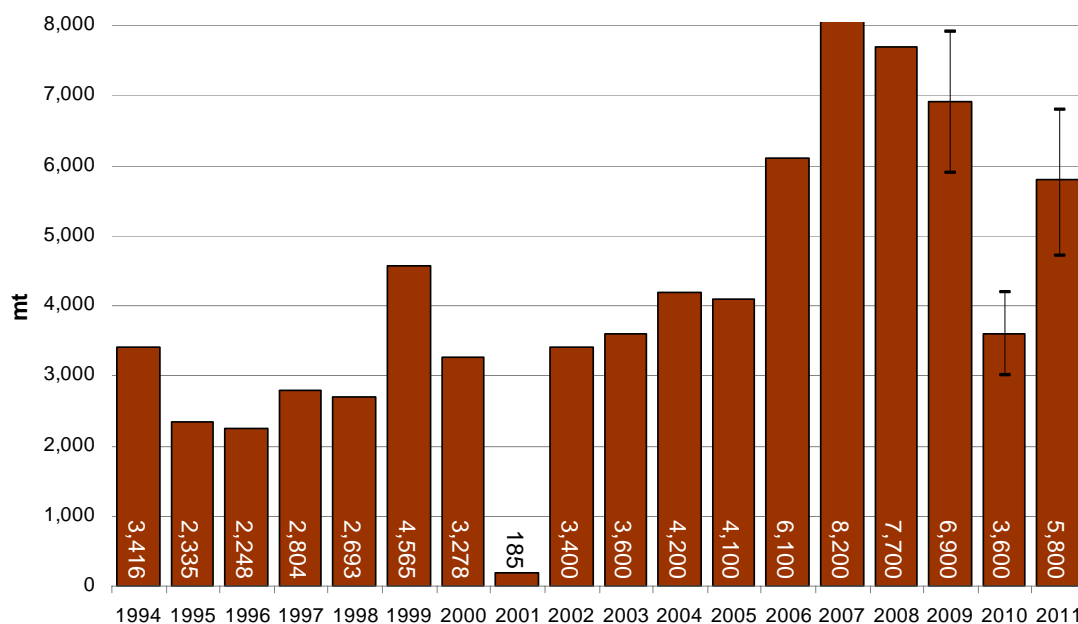
Province	2007	2008	2009	2010	2011	Change 2010-2011
Hilmand	102,770	103,590	69,833	65,045	63,307	-3%
Kandahar	16,615	14,623	19,811	25,835	27,213	+5%
Farah	14,865	15,010	12,405	14,552	17,499	+20%
Uruzgan	9,204	9,939	9,224	7,337	10,620	+45%
Nangarhar	18,739	Poppy- free	294	719	2,700	+276%
Badakhshan	3,642	200	557	1,100	1,705	+55%
Badghis	4,219	587	5,411	2,958	1,990	-33%
Day Kundi	3,346	2,273	3,002	1,547	1,003	-35%
Nimroz	6,507	6,203	428	2,039	2,493	+22%
Rest of the country	13,074	4,828	2,131	1,383	2,535	+83%
Rounded Total	193,000	157,000	123,000	123,000	131,000	7%

Potential opium production increased in 2011 but remained lower than in 2009

In 2011, the estimated potential opium production amounted to 5,800 mt, an increase by 61% over 2010. As opium cultivation remained relatively stable between 2009 and 2011, the differences in opium production in those years were due to changes in per-hectare opium yield. 2009 was a year with high opium yields (56.1 kg/ha), while in 2010, major opium cultivation areas were affected by plant diseases, which led to a strong yield reduction (29.2 kg/ha). In 2011, opium yields were back to “normal” levels of 44.5 kg/ha.

In 2011, the Southern region continued to produce most opium in Afghanistan, representing 85% of national production, followed by the Western region (12%).

Figure 8: Potential opium production in Afghanistan (mt), 1994-2011



Note: The high-low bars indicate the upper and lower bounds of the estimation range.

Table 5: Potential opium production by region (mt), 2010-2011

Region	Production 2010 (mt)	Production 2011 (mt)	Change 2010-2011 (%)
Central Region	8	9	+13%
Eastern Region	56	166	+196%
North-eastern Region	56	39	-30%
Northern Region	Poppy-free	12	NA
Southern Region	2,979	4,924	+65%
Western Region	478	685	+43%
Total (rounded)	3,600	5,800	+61%

Eradication in 2011 was 65% more than 2010

A total of 3,810 ha of Governor-led eradication (GLE) was verified by MCN/UNODC. GLE was carried out in 18 provinces. The final figures of eradication in Badakhshan, Farah, Hilmand, Hirat, Kabul, Kandahar and Uruzgan provinces were adjusted after verification by using satellite images.

Table 6: Eradication and opium cultivation in Afghanistan (ha) 2005-2011

Year	2005	2006	2007	2008	2009	2010	2011
Governor-led Eradication (GLE) (ha)	4,000	13,050	15,898	4,306	2,687	2,316	3,810
Poppy Eradication Force (PEF) (ha)*	210	2,250	3,149	1,174	2,663	**	**
Total (ha)	4,210	15,300	19,510	5,480	5,351	2,316	3,810
Cultivation (ha) **	104,000	165,000	193,000	157,000	123,000	123,000	131,000
% poppy in insecure provinces of South and West	56%	68%	80%	98%	99%	95%	95%
Poppy-free provinces	8	6	13	18	20	20	17
Number of provinces with eradication	11	19	26	17	12	11	18

* The activities of the Poppy Eradication Force (PEF) were discontinued after 2009.

** Net opium cultivation after eradication

Comparing the 2010 and 2011 eradication campaigns, the following can be noted:

- **Total eradication** in 2011 was 65% higher than in 2010. In 2011, total eradication was **3,810 hectare** in **18 provinces** compared to **2,316 hectare** in **11 provinces** in 2010.
- **Eradication campaign** took place in more provinces compared to 2010. In 2011, an eradication campaign was carried out in **18 provinces** compared to **11 provinces** in 2010.
- In 2011, the eradication campaign started in mid-February and at the end of February in Kandahar and Hilmand provinces respectively. In 2010, the eradication campaign had started in mid-February in Hilmand whereas in Kandahar there was no eradication at all.
- Eradication campaigns in 2011 were mostly undertaken in the Southern, Western, and North-eastern regions while there was less eradication in the Eastern and Northern regions this year compared to last year.
- In 2011, the number of security incidents was higher than the year 2010. GLE teams were **attacked 48 times** in 2011 while there were only **12 attacks** on GLE in 2010. However, in 2011 the number of fatalities is less than 2010. This year **20 eradication campaign related fatalities** were reported against **28** in 2010.

Table 7: Security incidents eradication, 2009-2011

	2008	2009	2010	2011	Change 2010-2011
Personnel injured	>100	52	36	45	+25%
Fatalities	78	21	28	20	-29%

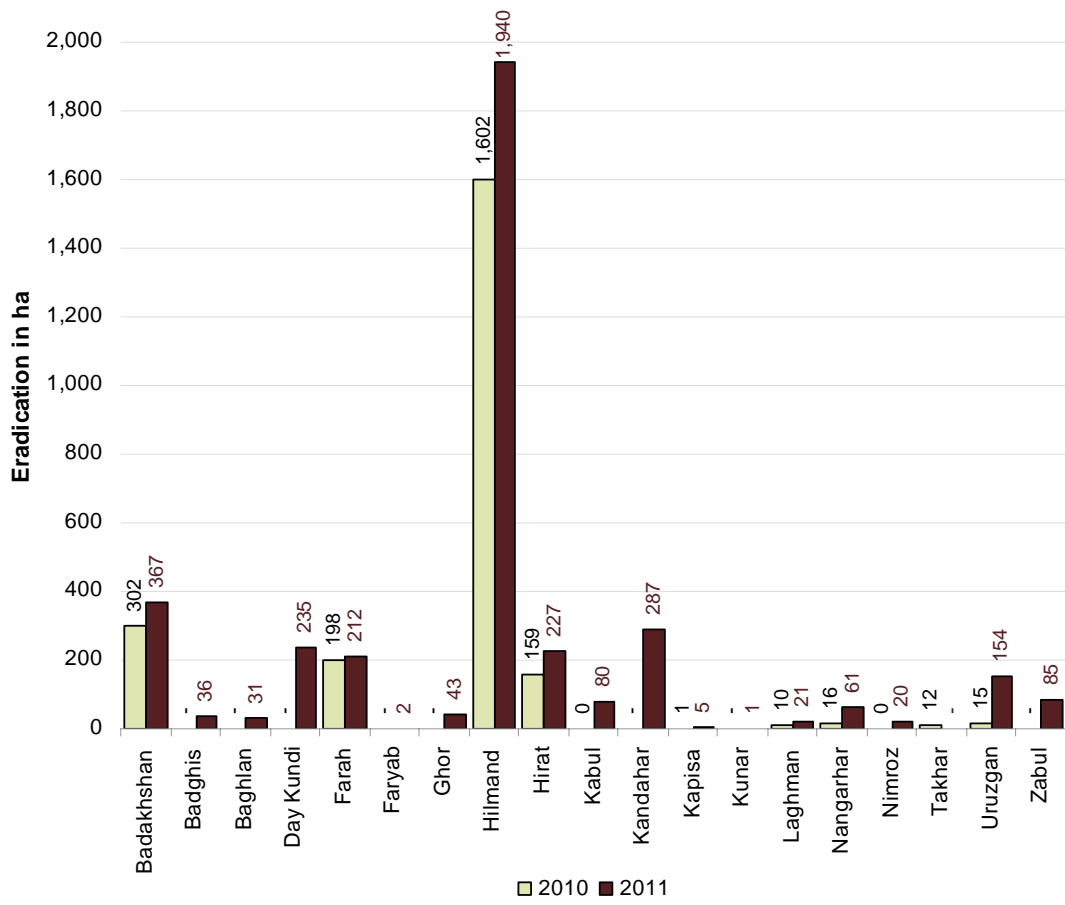
As reported by eradication verification surveyors.

Although the highest number of hectares eradicated (1,940 ha) was verified in Hilmand province, this amount was negligible (3%) considering the amount of opium cultivation in this province (over 63,000 ha). Eradication in Farah, Kandahar and Uruzgan (1% each) were also negligible in comparison to total opium cultivation (17,499 ha, 27,213 ha and 10,620 ha respectively). By comparison, in Badakhshan, eradication represented 22% of the net area under opium cultivation in the province (1,705 ha).

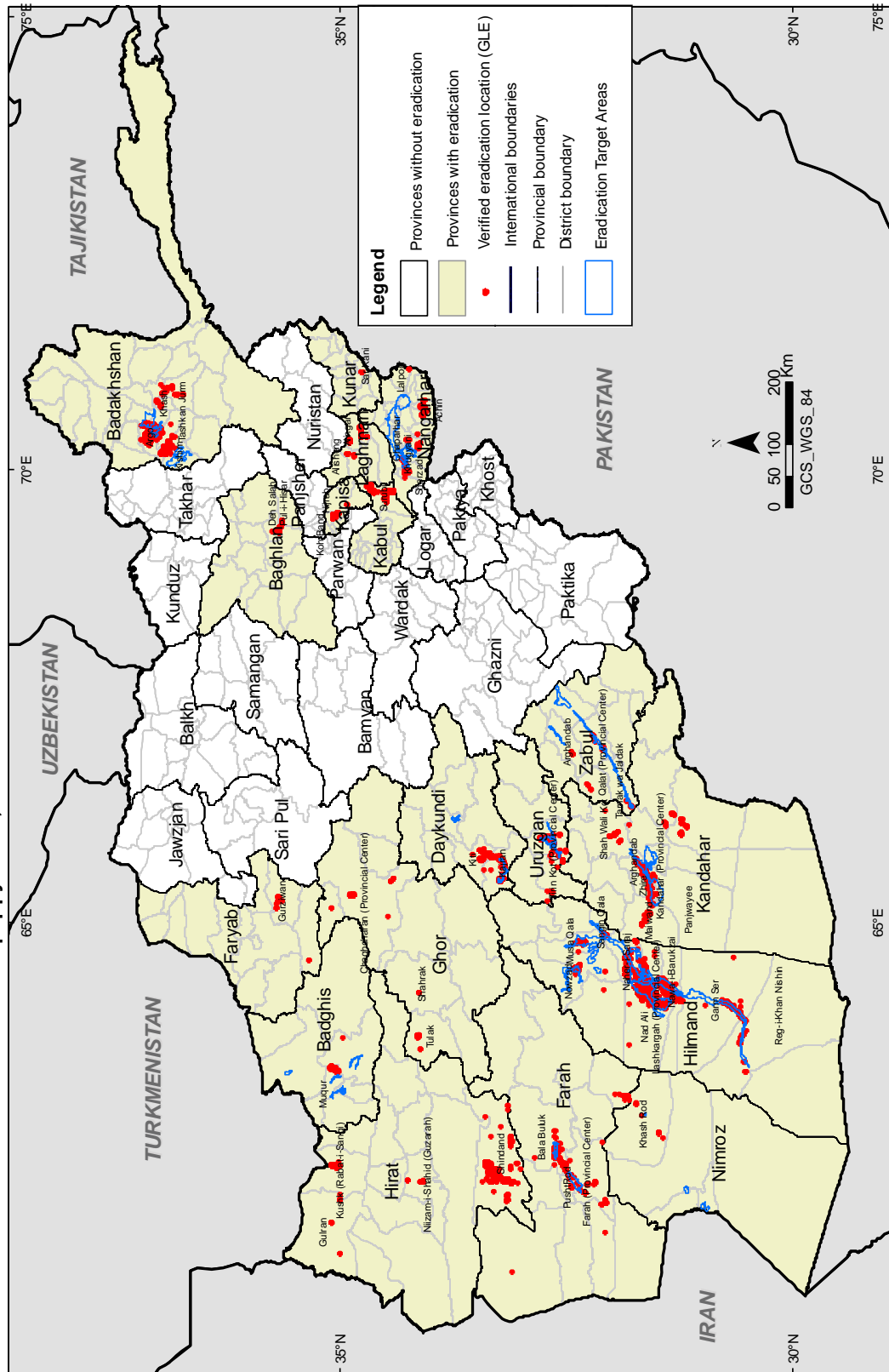
Table 8: Governor-led eradication by province (ha), 2011

Province	Eradication (ha) verified	No. of fields eradication reported	No. of villages with eradication reported
Badakhshan	367	1,655	72
Badghis	36	69	4
Baghlan	31	55	12
Day Kundi	235	605	26
Farah	212	440	24
Faryab	2.4	24	7
Ghor	43	82	7
Hilmand	1,940	4,435	207
Hirat	227	1,088	69
Kabul	80	757	30
Kandahar	287	520	56
Kapisa	5	87	9
Kunar	1	4	1
Laghman	21	148	8
Nangarhar	61	295	22
Nimroz	20	44	8
Uruzgan	154	421	16
Zabul	85	45	15
Total	3,810	10,774	593

Figure 10: Eradication comparison by province in 2010 and 2011



Locations of Governor-led eradication of poppy fields, 2011



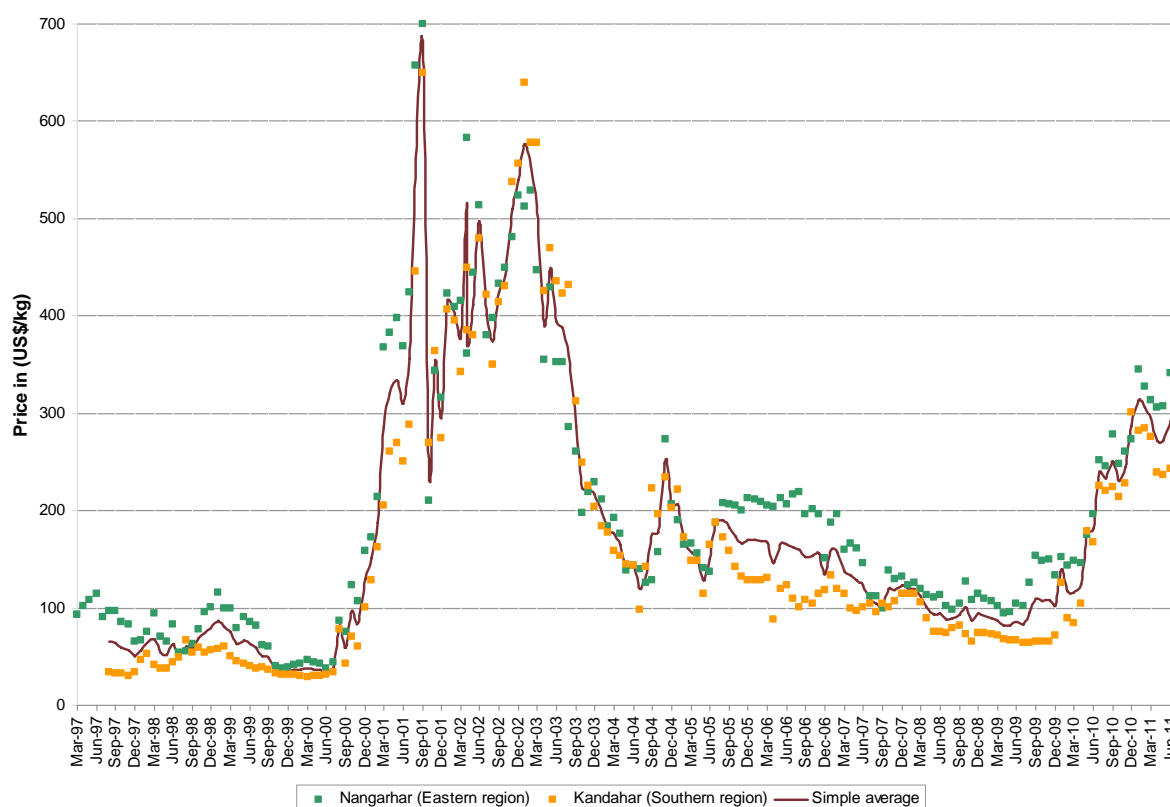
Source: MCN - UNODC Afghanistan Eradication Survey 2011
 Note: The boundaries and names shown on this map do not imply official endorsement or acceptance by the United Nations.

Opium prices continue to be very high

In 2011, opium prices had reached high levels as a result of the unusually low opium production in 2010, when major cultivation areas were affected by plant diseases.

Results from the 2009 opium survey indicated that the low opium price level in that year discouraged farmers from planting opium. However, since then, opium prices have tripled. The high sale price of opium in combination with lower wheat prices may have encouraged farmers to resume opium cultivation. The high level of opium prices in 2011 continues to provide a strong incentive to plant opium in the upcoming poppy season. While farmers' decision-making on whether or not to grow opium poppy is complex, it is obvious that the high level of opium prices in 2010 could have been one of the factors behind a resurgence of poppy cultivation in the Northern and Eastern regions.

Figure 9: Opium prices reported by traders in Kandahar and Nangarhar, Mar 1997 - Aug 2011 (US\$/kg)



Nominal prices converted to US\$ at local exchange rate, not adjusted for inflation.

MCN/UNODC has monitored opium prices on a monthly basis in selected provinces of Afghanistan since 1994 (16 provinces as of August 2011). In all regions monthly prices showed an overall decreasing trend between 2005 and 2009 and prices differences between regions got smaller. Since about mid-2009, opium prices have started to

increase, most noticeably in the Eastern, Southern and Western regions. This development was accelerated when opium production in 2010 turned out to be unusually low due to the impact of plant diseases. Price differences between regions became more and more pronounced. In 2011, opium prices started to decrease at around harvest time in some regions, but remained volatile and at a higher level than in any year since 2005.

Figure 10: Dry opium prices reported by traders, by region (US\$/kg), January 2005 to August 2011

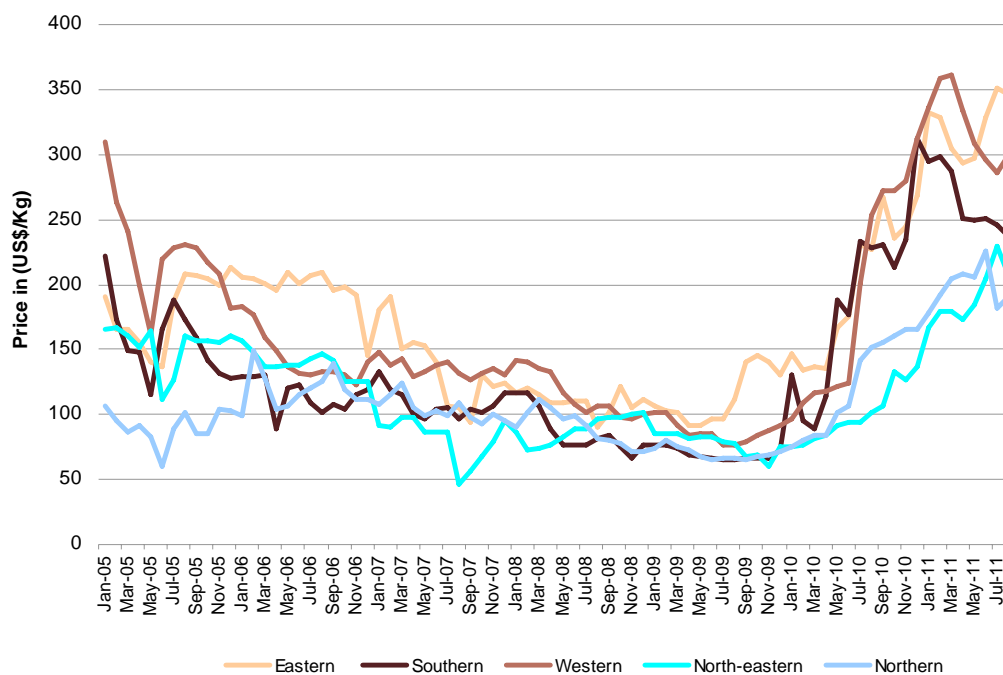


Table 9: Regional farm-gate prices of dry opium at harvest time (US\$/kg), 2010-2011

Region	Average Dry Opium Price (US\$/kg) 2010	Average Dry Opium Price (US\$/kg) 2011	Change on 2010
Central Region	133	255	+92%
Eastern Region	130	290	+123%
North-eastern Region	91	218	+140%
Northern Region	104	238	+129%
Southern Region	181	232	+28%
Western Region	108	296	+174%
National average weighted by production*	169	241	+43%

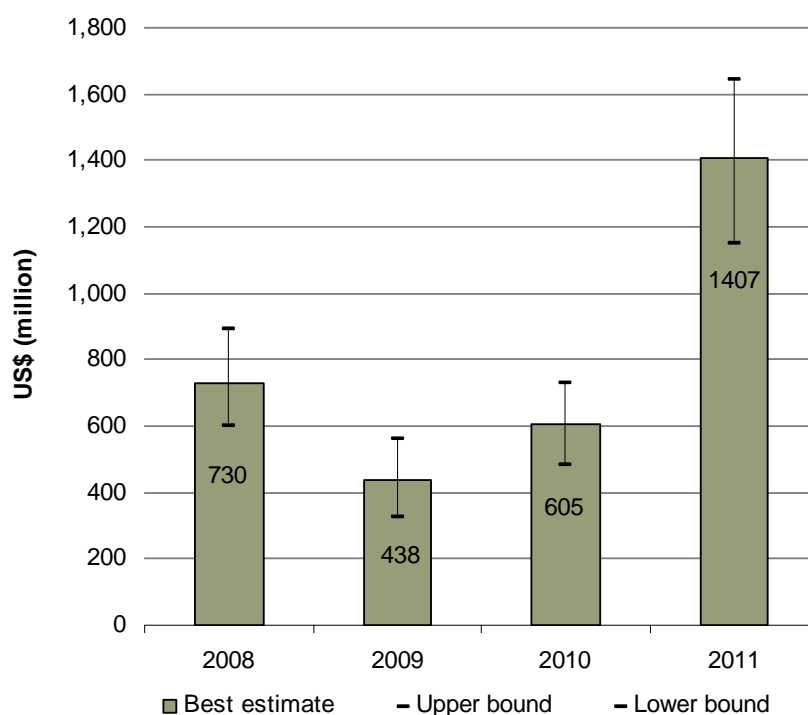
* Prices for the Central region were taken from the annual village survey as there is no monthly opium price monitoring in the Central region. Prices for all other regions were derived from the opium price monitoring system and refer to the month when opium harvest took actually place in different regions of the country.

Farm-gate value of opium production more than doubled in 2011

In 2011, the farm-gate value of opium production more than doubled compared to 2010 and amounted to US\$ 1,407 million. This is equivalent to about 9% of the GDP estimate for 2011. While the farm-gate value was expected to be higher than 2010, when opium production was down due to plant diseases, the 2011 farm-gate value also exceeded levels reached in years with similar or even higher opium production by far due to higher prices.

Similarly, in 2011, the per-hectare income from opium cultivation (US\$ 10,700) has reached levels not observed since 2003.

Figure 11: Farm-gate value of potential opium production (US\$ million), 2008-2011

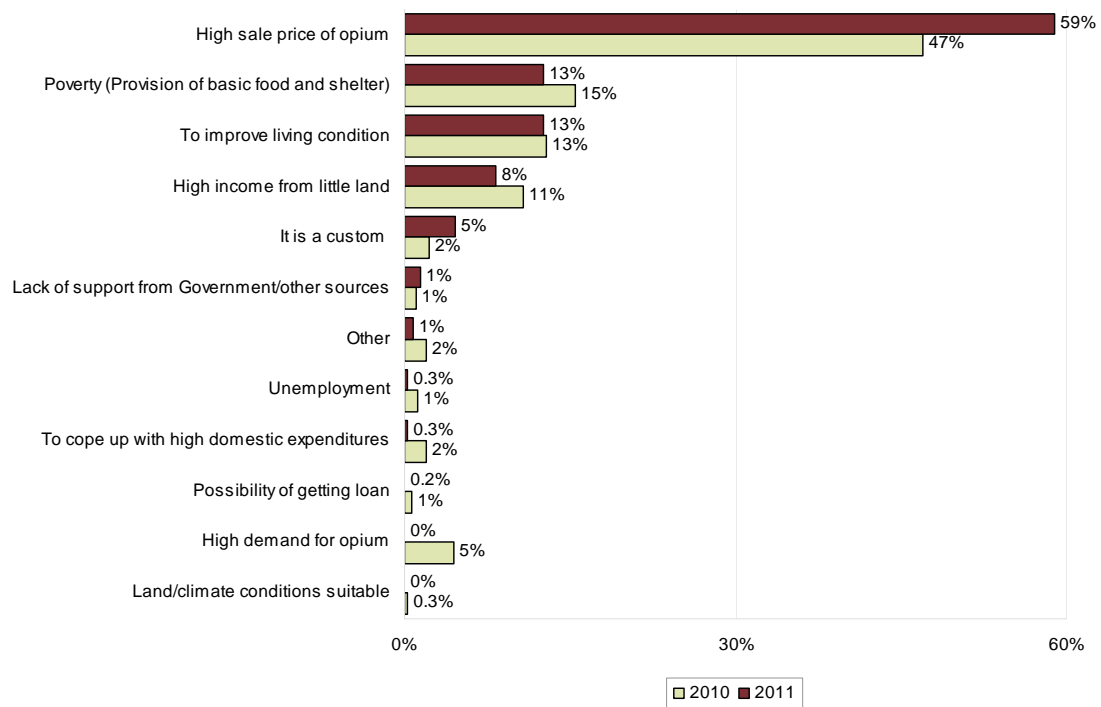


Note: The high-low bars represent the upper and lower bounds of the estimation range.

Reasons for cultivating opium poppy

The high sale price continued to be the most important reason for cultivating opium poppy cited by farmers in 2011 (59%) and 2010 (47%). Provision of basic food and shelter for the family, improving living condition and high income from little land were other important reasons given.

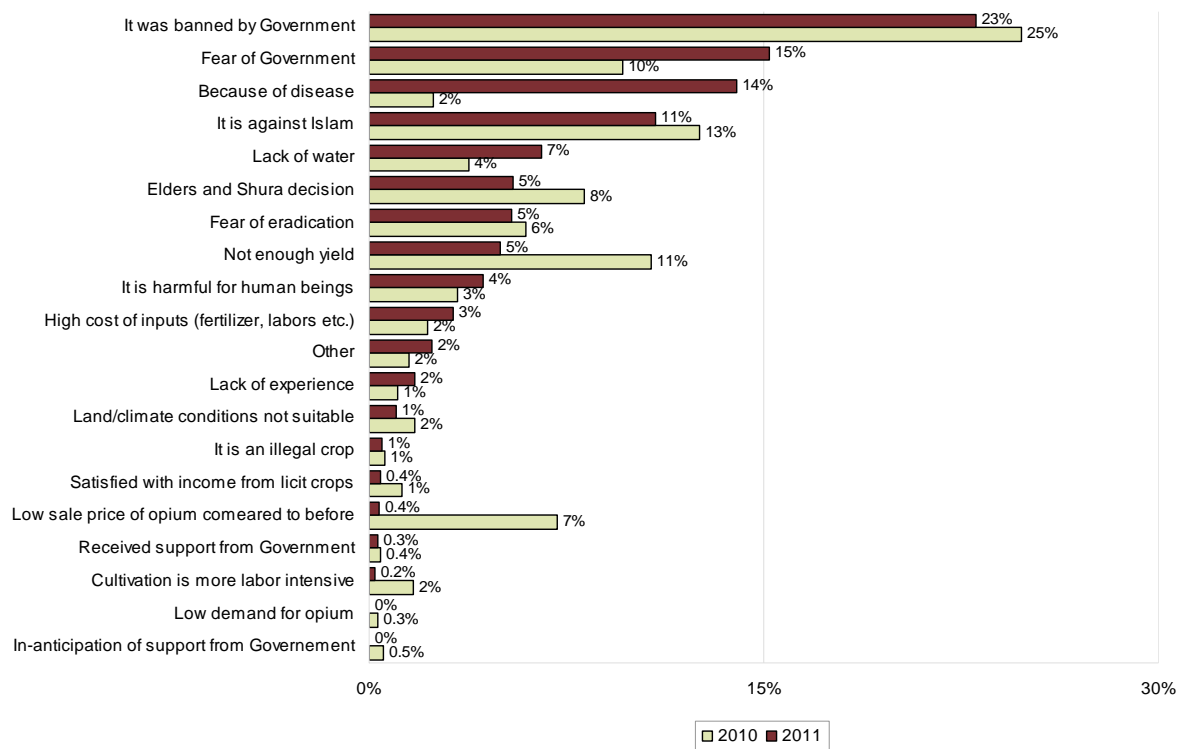
Figure 12: Reasons for cultivating opium in 2011 (n=379 farmers)



Reasons for stopping opium cultivation

In 2011, farmers who had stopped cultivating opium in 2010 or before were asked about their major reason for doing so. The Government ban on opium cultivation was mentioned by 23% and 25% of the respondents in 2011 and 2010 respectively, making it the most frequently cited reason for stopping opium cultivation. Fear of Government was the second main reason (15%) in 2011. 14% of farmers mentioned that they have stopped opium cultivation because of fear of plant diseases. As diseases were hardly mentioned in the 2010 survey, this relatively high proportion in 2011 seems to reflect the experience or at least knowledge of the wide-spread plant diseases which affected poppy in 2010 and led to a substantive reduction in yield. Being against Islam, lack of water, Elders’ and Shura decision, fear of eradication, not getting enough yield and being harmful for human beings were the other reasons mentioned for stopping opium cultivation.

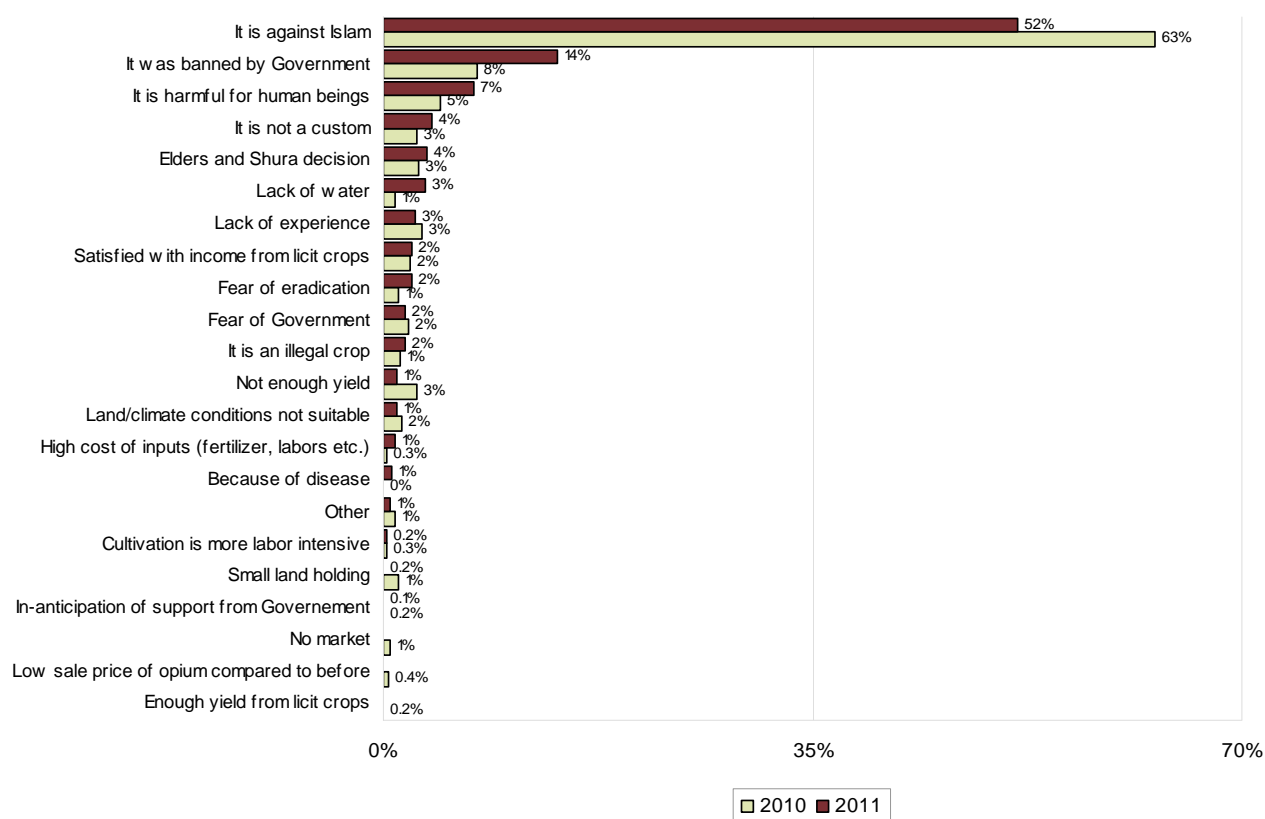
Figure 13: Reasons for stopping opium cultivation in or before 2011 (n=1267 farmers)



Reasons for never cultivating opium poppy

Religious belief is the most dominant reason for never having cultivated opium poppy. 52% of farmers who never grew opium reported that they did not do it because it is forbidden (haraam) in Islam. The ban by the Government and being harmful for human beings were other main reasons for never cultivating opium poppy.

Figure 14: Reasons for never cultivating opium (n=2821 farmers)



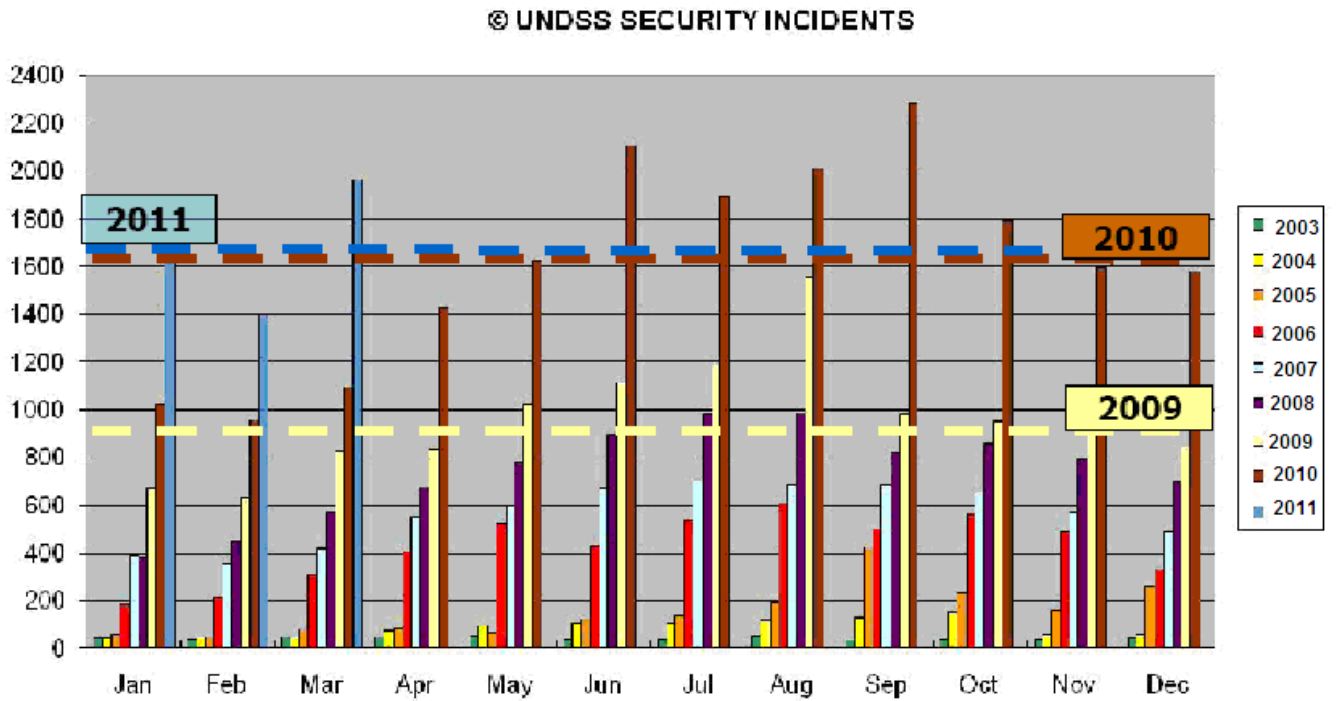
Strong link between lack of security and opium cultivation

78% of the opium cultivated in 2011 was concentrated in Hilmand, Kandahar, Uruzgan, Day Kundi, and Zabul provinces of the Southern region and 17% was concentrated in Farah, Badghis, Nimroz provinces in the Western region. These are the most insecure provinces where security conditions are classified as high or extreme risk by the United Nations Department of Safety and Security (UNDSS). Most of the districts in this region were not accessible to the United Nations and non-governmental organisations.

Overall, 95% of the total opium cultivation took place in the Southern and Western regions. Anti-government elements (AGE) as well as drug traders are very active in the Western region. Provinces in the south are the strongholds of AGEs, while provinces in the west (Farah, Badghis and Nimroz) are known to have organized criminal networks. The link between lack of security and opium cultivation was also evident in Nangarhar province (Eastern region) and Kabul province (Central region), where cultivation was located in districts classified as having high or extreme security risk.

Security incidents in Afghanistan have been on the rise every year since 2003, especially in the south and south-western provinces.

Figure 15: Number of security incidents by month, January 2003 to March 2011





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