



Afghanistan and narcotics: Opium poppy cultivation trends, 2001 – 2009

Standard Note: SN/IA/05025

Last updated: 24 March 2009

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Afghanistan is the world's largest producer of opiates, accounting for 93% of global opium production and over 90% of the heroin trafficked into the UK. Although the production, consumption and smuggling of narcotics are prohibited under the Afghan constitution, opium production in Afghanistan has increased markedly since the overthrow of the Taliban regime in 2001, and reached record levels in 2007. Poppy cultivation provides many Afghan farmers with significantly greater income than other crops, and this money helps drive the rural economy. Yet, the narcotics trade also imposes considerable costs on the country, distorting the economy, undermining the authority of central and local government, and fuelling the corruption which plagues Afghanistan's fragile political system. Moreover, in recent years, the narcotics trade and the Taliban insurgency have become inextricably linked. Areas of high opium production mirror those of the Taliban strongholds in the south and west of the country in which the presence of international forces, NGOs and the Afghan government are weakest. Indeed, Helmand Province, where UK Forces operate, now accounts for two-thirds of Afghanistan's total opium production, making the province the largest narcotics producer per head of population in the world. Whether Afghanistan has become a "narco" state is the subject of heated debate, but most observers recognise that the narcotics trade poses a serious threat to the future of Afghanistan and to the efforts of international forces, aid agencies, and international organisations to stabilise and rebuild the country.

This note examines the scale of the opium problem in Afghanistan and analyses recent trends in opium production in the country, including the latest figures published by the United Nations Office on Drugs and Crime (UNODC) in August 2008 and its forecast for 2009, published in February 2009. It also outlines the linkages between the narcotics trade and the Taliban insurgency. The counter-narcotics strategies employed by the Afghan government and its international partners, and the effectiveness of those strategies, will be the focus of a separate, forthcoming Library Standard Note.

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Background on the situation in Afghanistan can be found in Library Standard Note SN/IA/04788, [Afghanistan](#), published on 8 July 2008. Information on NATO's military operations is available in Library Standard Note SN/IA/4143, [International Security Assistance Force in Afghanistan](#), published on 23 October 2008. Information on the cost of UK military operations in Afghanistan are available in Library Standard Note SN/SG/3139, [The cost of military operations in Iraq and Afghanistan](#), published on 28 September 2008. Further background on the country and its development since 2001 can be found in Library Research Paper 05/72, [Afghanistan: the culmination of the Bonn process](#), of 26 October 2005.

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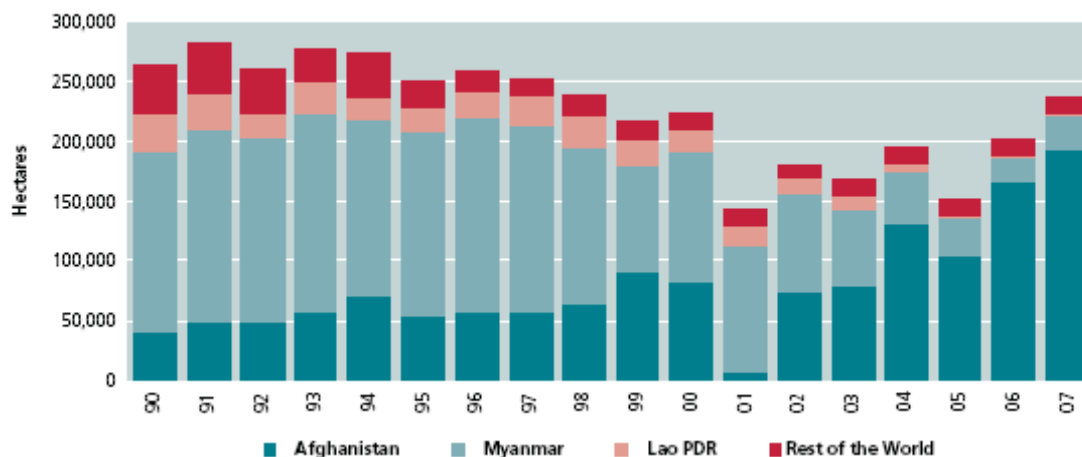
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1 Afghanistan's share of the global opiates market

Afghanistan is, by far, the world's largest producer of opium and its derivatives, heroin and morphine. According to the United Nations Office on Drugs and Crime (UNODC), in 2007 Afghanistan accounted for 93% of global opium production and for 82% of the geographic area under poppy cultivation worldwide. By comparison, in the same year Myanmar, the second highest opium-producing nation, accounted for just 5% of global opium production and 12% of the geographic area under poppy cultivation. Pakistan, the third highest opium producing country in 2007, accounted for just 0.7% of global opium production and 0.5% of the area under poppy cultivation.¹

Of the 8,870 metric tons of opium produced globally in 2007 – a record year for worldwide opium production – Afghanistan accounted for 8,200 metric tons. Myanmar, by contrast, accounted for 460 metric tons.² In turn, the geographic area in Afghanistan under poppy cultivation in 2007 was a record 193,000 hectares compared with Myanmar's 27,700 hectares. Pakistan, meanwhile, produced 43 metric tons of opium in 2007 and had 1,701 hectares under poppy cultivation. As the following graphs from the UNODC demonstrate, with the exception of 2001 when the Taliban cracked down dramatically on opium production, Afghanistan has dominated the global opiates market in recent years. Its 93% share of global opium production in 2007 contrasts with its average share of 56% between 1990 and 2000, while its 82% share of the land dedicated to poppy cultivation worldwide in 2007 compares with its average 25% share between 1990 and 2000.³

Fig. 15: Global opium poppy cultivation (hectares), 1990-2007



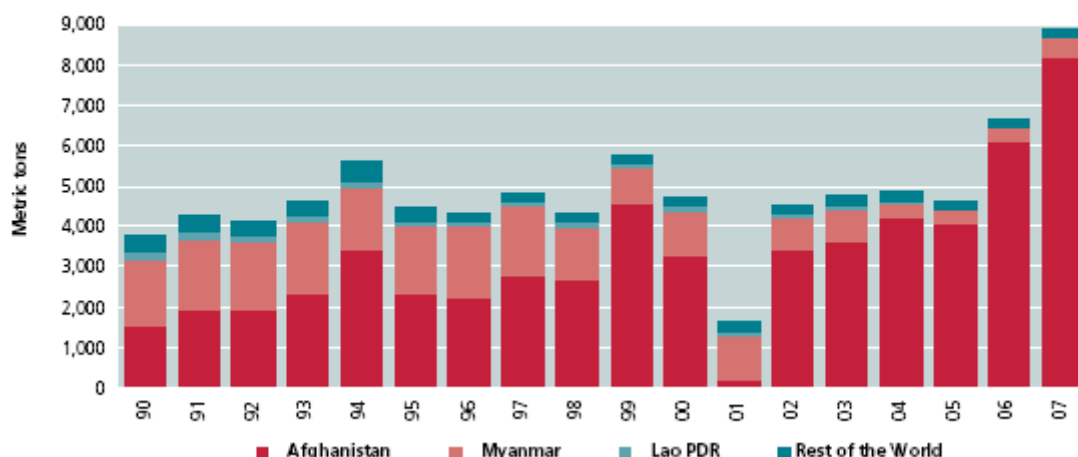
Source: UNODC 2008 World Drug Report

¹ UNODC, [2008 World Drug Report](#), p 38. In 2006, Mexico had been the third highest opium producing nation, accounting for 2.1% of global opium production and 1.2% of the global area under poppy cultivation. However, Mexico's figures for 2007 were not available at the time the UNODC produced its report.

² *Ibid*, p 40

³ *Ibid*, p 38. Average figures are rounded up to the nearest full percentage point.

Fig. 16: Global opium production (metric tons), 1990-2007



Source: UNODC 2008 World Drug Report

The record levels of global opium cultivation and production in 2007 were largely the result of increases in narcotics activities in Afghanistan, though the UNODC also observed increases in South-East Asia. While in Afghanistan the area under poppy cultivation rose by 17%, in South-East Asia as a whole there was a 22% increase and in Myanmar a 29% increase in cultivation. Nevertheless, the UNODC emphasised that it was the increase in opium cultivation and production in Afghanistan that posed the most significant problem; despite the recent increase in cultivation, opium poppy cultivation in South-East Asia had decreased by 82% since 1998.⁴ The UNODC noted that:

In 2007, the opium/heroin market continued to expand on the strength of cultivation increases in Afghanistan which pushed up the area of illicit opium poppy cultivation worldwide by 17%. However, cultivation also increased in South-East Asia, where it went up after six consecutive years of decline.⁵

Although the volume of opium produced globally rose to unprecedented levels in 2007, due in part to increases in yield, the UNODC observed that “global cultivation remains lower than annual levels for 1990 to 1998 at just below its 1998 levels”.⁶

2 Opium production in Afghanistan, 2001 – 2007

Between 1994 and 2003, the area under opium poppy cultivation in Afghanistan generally fluctuated between 54,000 and 91,000 hectares. 2001 saw a dramatic decline to 8,000 hectares after the Taliban imposed a prohibition on opium cultivation. However, following the overthrow of the Taliban, the figures returned to their previous levels, with 74,000 and 80,000 hectares brought under cultivation in 2002 and 2003 respectively. The UNODC, which has conducted annual opium surveys in Afghanistan since 1994 observed that:

An abrupt decline in illicit opium was recorded in Afghanistan in 2001, following the ban imposed by the Taliban regime in its last year in power [...] The power vacuum in Kabul caused by the aftermath of 11 September 2001 enabled farmers to replant opium poppy (starting in October/November 2001). By the time the Afghan Interim Administration was established and issued a strong ban on opium poppy cultivation,

⁴ UNODC, [2008 World Drug Report](#), p 11

⁵ *Ibid*, p 11

⁶ *Ibid*, p 39

processing, trafficking and consumption (17 January 2002), most opium poppy fields had already started to sprout.⁷

In 2004, the area under opium poppy cultivation increased by 64%, to a record level of 131,000 hectares. The UNODC reported in its *Opium Survey 2004* that opium production was increasingly encroaching on previously unaffected areas and had spread from 18 provinces in 1999 to all 32 provinces during 2004.⁸ The number of families involved in opium production rose by 35% over the previous year and was estimated at 356,000 families – around 2.3 million persons or 10% of the total Afghan population.

In 2005, for the first time since the overthrow of the Taliban, the UNODC recorded a fall in opium cultivation in Afghanistan. Cultivation fell by 21% to 104,000 hectares. The number of provinces affected by cultivation fell from 32 to 25. Meanwhile, there was a 2.4% reduction in the amount of opium produced from 4,200 metric tons to 4,100 metric tons. 2005 also witnessed a 13% reduction in the number of families involved in opium production from 365,000 to 309,000 – from 2.3 million people to 2.0 million, or from 10% to 8.7% of the Afghan population.⁹ A sense of optimism was conveyed in the UNODC's annual *Opium Survey* in 2006:

This year, progress on the illicit opium market is catching up with political change. For the first time since 2001, Afghanistan has succeeded in achieving a decrease in opium cultivation with the area devoted to drug crops declining an impressive 21% to 104,000 ha.

The decline in cultivation is important and encouraging. [...] This is real progress and we need to build on it quickly.¹⁰

In 2006, however, these gains were reversed as opium production soared. The amount of land used for poppy cultivation increased dramatically, by 59%, from 104,000 hectares in 2005 to 165,000 hectares in 2006. The number of provinces affected rose from 25 to 28 and the quantity of opium produced rose from 4,100 metric tons to 6,100 metric tons – a 49% increase. The number of families involved in opium production jumped from 309,000 in 2005 to 448,000 in 2006 – a 45% increase – and the number of individuals involved in opium production increased from 2 million to 2.9 million, or from 8.7% to 12.6% of the population.¹¹ In its *Opium Survey 2006*, the UNODC underscored the destructive impact of the opium trade and its potential impact on Afghanistan:

Either Afghanistan destroys opium or opium will destroy Afghanistan, President Hamid Karzai has warned. As this survey shows, we are coming dangerously close to the second option. This year, opium cultivation rose to 165,000 hectares, a 59% increase over 2005. An unprecedented 6,100 tons of opium has been harvested, making Afghanistan virtually the sole supplier to the world. "Revenue from the harvest will be over three billion dollars this year, making a handful of criminals and corrupt officials extremely rich" Mr Costa [Head of the UNODC] said. "This money is also dragging the rest of Afghanistan into a bottomless pit of destruction and despair".¹²

⁷ UNODC, *Afghanistan Opium Survey 2002*, October 2002, p 3

⁸ The number of provinces was increased in mid-2004 from 32 to 34.

⁹ UNODC, *Afghanistan Opium Survey 2005*, p 1

¹⁰ UNODC, *Afghanistan Opium Survey 2006*, p iii

¹¹ *Ibid*, p 1

¹² *Ibid*, p iv

In 2007, further increases brought about record levels of opium cultivation and production in Afghanistan. The UNODC recorded a 17% increase in the amount of land used for cultivation from 165,000 hectares in 2006 to a record 193,000 hectares in 2007. With higher yields also recorded, the amount of opium produced in Afghanistan rose by 34% to 8,200 metric tons. Similarly, the number of families involved in opium production increased by 14% to 509,000 families, from 2.9 million to 3.3 million individuals or 14.3% of the population. The farm-gate value of opium meanwhile rose by 32%, from US\$ 0.75 billion in 2006 to US\$ 1 billion in 2007 or 13% of Afghanistan's total GDP of US\$ 7.5 billion.

The dramatic increases in opium cultivation and production in 2006 and 2007 led the UNODC to conclude, in its *Afghanistan Opium Survey 2007*, that Afghanistan had become “the world’s leading drug producer” and that opium production had reached “a frighteningly new level”. According to Antonia Maria Costa, Executive Director of the UNODC, “no other country in the world has ever produced narcotics on such a deadly scale”.¹³ Mr Costa said:

The amount of Afghan land used for opium is now larger than the corresponding total for coca cultivation in Latin America (Colombia, Peru and Bolivia combined) [...] In 2007 Afghanistan produced an extraordinary 8,200 tons of opium [...] becoming practically the exclusive supplier of the world’s deadliest drug [...] Leaving aside 19th Century China, that had a population 15 times larger than today’s Afghanistan, no other country in the world has ever produced narcotics on such a deadly scale [...]

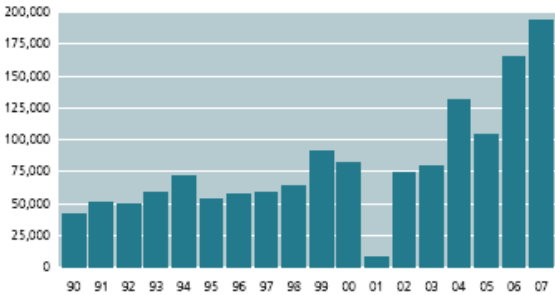
On aggregate, Afghanistan’s opium production has thus reached a frighteningly new level [...]

It would be an historic error to let Afghanistan collapse under the blows of drugs and insurgency. This double threat is real and growing, despite a foreign military presence in the tens of thousands, billions of dollars spent on reconstruction, and the huge political capital invested in stabilising a country that has been in turmoil for a third of a century. [...]

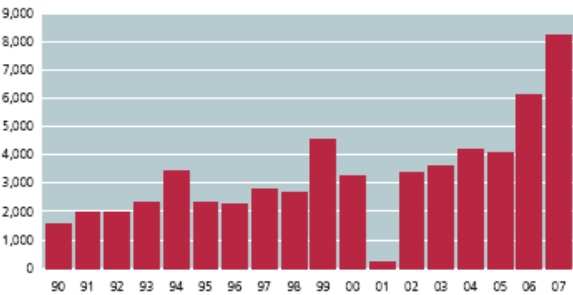
The Afghan opium situation looks grim, but it is not yet hopeless [...] It will take time, money and determination – worthwhile investments to spare Afghanistan and the rest of the world more tragedies.¹⁴

Figures from UNODC’s *2008 World Drug Report*, published on 26 June 2008, reveal overall increases in both the amount of land used for poppy cultivation in Afghanistan and the quantity of opium produced since 1990. As the following graphs demonstrate, there has been a clear upward trend in both cultivation and production in recent years, with record levels of production and cultivation set in both 2006 and 2007:

AFGHANISTAN - OPIUM POPPY CULTIVATION (hectares), 1990-2007



AFGHANISTAN - OPIUM PRODUCTION (metric tons), 1990-2007



¹³ UNODC, *Afghanistan Opium Survey 2007*, published August 2007, p iv

¹⁴ UNODC, *Afghanistan Opium Survey 2007*, Foreword, August 2007, pp iv-vii

3 Regional variations in opium production, 2001 – 2007

There have long been wide regional variations in poppy cultivation and opium production in Afghanistan. Historically, most cultivation has taken place in the fertile South and East of the country. In its *Opium Survey 2002*, the first since the fall of the Taliban, the UNODC found that poppy cultivation was recorded in 24 of Afghanistan's 32 provinces, with the bulk of cultivation taking place certain provinces in the South, East and North of the country:

In line with the usual pattern (with the exception of 2001), almost 95% of the cultivation was concentrated in just five provinces. Helmand in the South came first, with nearly 30,000 ha, followed by Nangahar in the East (about 20,000 ha), Badakhshan in the North (about 8,000 ha), Uruzgan in the South/Centre (about 5,000 ha) and Kandahar in the South (about 4,000 ha).¹⁵

The following table from the UNODC's 2002 *Opium Survey* shows the geographical distribution of opium cultivation in Afghanistan in 2002. The five provinces listed in the South, East and North accounted for 90% of the country's geographic area under cultivation and 89% of the country's total opium production.¹⁶

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

Source: UNODC *Afghanistan Opium Survey 2002*

In 2003, the UNODC recorded an increase in the number of provinces affected by poppy cultivation from 24 to 28 of the country's 32 provinces. The UNODC's 2003 *Opium Survey* warned that:

There has been a clear and accelerating extension of opium cultivation to previously unaffected, or marginally affected areas. The number of provinces which opium poppy cultivation was reported has steadily increased: from 18 provinces in 1999, to 23 in 2000, up to 24 in 2002 and to a staggering 28 provinces in 2003 (out of a total of 32). Almost 90% of the provinces are now affected, with an increase of over 50% in 4 years.¹⁷

Despite this, there was a dramatic decline in cultivation in the Southern provinces of Helmand and Kandahar in 2003. In Helmand, cultivation fell by 49% between 2002 and 2003, and in Kandahar by 24%. The UNODC attributed these reductions primarily to the Afghan government's prohibition and eradication measures. Nevertheless, there was a 40% increase in cultivation in the Southern province of Uruzgan. Falls in cultivation in Helmand and Kandahar, meant that the Eastern province of Nangahar emerged as the biggest opium cultivating province in 2003. In the North, meanwhile, the province of Badakhshan, which

¹⁵ UNODC, [Afghanistan Opium Survey 2002](#)

¹⁶ UNODC, [Afghanistan opium Survey 2002](#)

¹⁷ UNODC, [Afghanistan Opium Survey 2003](#)

borders Tajikistan, recorded a major increase in cultivation, up 55%.¹⁸ The following table from the UNODC's 2003 *Opium Survey* shows the increased prominence of Eastern and Northern provinces in opium cultivation in 2003:

Largest opium poppy cultivating provinces in 2003

Provinces	2002	2003	one year change	% of total in 2003	Cumulative % in 2003
Nangarhar	19,780	18,904	- 4%	23%	23%
Hilmand	29,950	15,371	- 49%	19%	43%
Badakhshan	8,250	12,756	+ 55%	16%	58%
Uruzgan	5,100	7,143	+ 40%	9%	67%
Ghor	2,200	3,782	+ 72%	5%	72%
Kandahar	3,970	3,055	- 23%	4%	76%
Rest of the country	4,850	19,471	+ 301%	24%	100%
Rounded Total	74,000	80,000	+ 8%		

Source: UNODC *Afghanistan Opium Survey 2003*

By 2004, opium cultivation had spread to all of Afghanistan's 32 provinces. The UNODC recorded increases in cultivation in all provinces in 2004, with one exception (Wardak province). The bulk of opium cultivation was again concentrated in a few provinces in the South, East and North of the country, with just three provinces accounting for 56% of the total area under cultivation: Helmand, Nangarhar and Badakhshan.¹⁹

Regional breakdown of opium poppy cultivation in Afghanistan (hectares)

Province	2002 (ha)	2003 (ha)	2004 (ha)	Change 2003 - 2004	% of total in 2004	Cumulative %
Hilmand	29,950	15,371	29,353	91%	22%	22%
Nangarhar	19,780	18,904	28,213	49%	22%	44%
Badakhshan	8,250	12,756	15,607	22%	12%	56%
Uruzgan	5,100	7,143	11,080	55%	8%	64%
Ghor	2,200	3,782	4,983	32%	4%	68%
Kandahar	3,970	3,055	4,959	62%	4%	72%
Rest of the country	4,796	19,472	36,441	87%	28%	100%
Rounded total	74,000	80,000	131,000	64%		

Source: UNODC *Afghanistan Opium Survey 2004*

In 2005 there was a 21% fall in the amount of land used poppy cultivation and a 2.4% reduction in total opium production. Significantly, 2005 also witnessed a reduction in the number of provinces affected, from all 32 provinces to 24 provinces. As the UNODC noted, this represented "the first contraction in many years and reverses the trend of previous years when opium poppy cultivation expanded into new provinces each year".²⁰

There were equally significant shifts in the regional distribution of poppy cultivation in 2005. While the majority of cultivation still took place in the South of the country, there was a large expansion in the North and West. The UNODC noted that "the regional distribution of opium poppy cultivation in Afghanistan shifted in 2005".²¹ Between 2004 and 2005, opium production in Central Afghanistan almost disappeared (recording a 98% reduction), despite the fact that the area accounted for 21% of Afghanistan's total opium cultivation in 2004. In Eastern Afghanistan, there was a 89% fall in cultivation and in the North-East a 47%

¹⁸ UNODC, [Afghanistan Opium Survey 2003](#)

¹⁹ UNODC, [Afghanistan Opium Survey 2004](#)

²⁰ UNODC [Afghanistan Opium Survey 2005](#), p 23

²¹ *Ibid*

decrease. While poppy cultivation in Southern Afghanistan remained fairly stable between 2004 and 2005, cultivation almost doubled in the North (up 93%) and increased by two-thirds in the West (67%).²² 2005 thus witnessed a concentration of opium poppy cultivation in the North, West and South of the country, as the following table from the UNODC's 2005 *Opium Survey* shows:

Table 1: Regional distribution of opium poppy cultivation in 2004 and 2005

Region	2004 (ha)	2005 (ha)	Change 2004-2005	share of total in 2004 (%)	share of total in 2005 (%)
South	48,431	46,147	-5%	37%	44%
North	14,627	28,282	93%	11%	27%
West	9,917	16,543	67%	8%	16%
North-East	16,369	8,734	-47%	12%	8%
East	36,621	4,095	-89%	28%	4%
Central	4,671	106	-98%	21%	0%
Rounded Total	131,000	104,000	-21%	100%	100%

Source: UNODC *Afghanistan Opium Survey 2005*

In terms of individual provinces affected, Helmand in the South remained the largest cultivating province, accounting for 25% of Afghanistan's total, despite recording a 10% reduction in opium cultivation between 2004 and 2005. Cultivation in Kandahar province, also in the South, rose by 162% and accounted for 12% of total opium cultivation. The most dramatic rises in cultivation were recorded in Balkh province in the North, where it rose more than three-fold (up 334%), and the Western province of Farah, again more than three-fold by 348%). In Nangahar and Badakhshan, in the East and North-East, there were dramatic falls in cultivation, by 96% and 53% respectively. The example of Nangahar is particularly significant. In 2004, it was the second highest opium cultivating province in Afghanistan. In 2005, it had become one of the provinces with the lowest cultivation levels.²³

Table 2: Change of area under opium poppy cultivation in main cultivation provinces, 2003-2005 (hectares)

Province	2003	2004	2005	Change 2004-2005	% of total in 2005	Cumulative %
Helmand	15,371	29,353	26,500	-10%	25%	25%
Kandahar	3,055	4,959	12,989	162%	12%	38%
Balkh	1,108	2,495	10,837	334%	10%	48%
Farah	1,700	2,288	10,240	348%	10%	58%
Badakhshan	12,756	15,607	7,370	-53%	7%	65%
Nangarhar	18,904	28,213	1,093	-96%	1%	66%
Rest of the Country	46,010	76,298	36,064	-53%	35%	100%

Source: UNODC *Afghanistan Opium Survey 2006*

2006 witnessed a 59% increase in opium cultivation nationwide. In the South, cultivation rose by 121%, meaning that opium cultivation in the South in 2006 was almost equal to the total opium cultivation in Afghanistan in 2005. Helmand Province saw cultivation increase by 162% and Uruzgan by 383%, though Kandahar saw a fall of 3%. In the West, Day Kundi's cultivation rose by 173% but Farah's fell by 25%. Significant increases were also recorded in the Eastern province of Nangahar, where cultivation rose by 346% and in the North East province of Badakhshan, where cultivation increased by 77%. In the North, Balkh province recorded a 34% fall in cultivation. Overall, in 2006, cultivation increased in the South by

²² UNODC, [Afghanistan Opium Survey 2005](#)

²³ *Ibid*

121%, in the Centre by 218%, in the East by 103% and in the North East by 74%. The North recorded a 20% fall and the West cultivation levels were stable.²⁴

Figure 5: Main opium poppy cultivation provinces in Afghanistan in 2006 (hectares)

Province	2003	2004	2005	2006	Change 2005-2006	% Total in 2006	Cumulative %
Helmand	15371	29353	26500	69324	162%	42%	42%
Badakhshan	12756	15607	7370	13056	77%	8%	50%
Kandahar	3055	4959	12989	12619	-3%	8%	58%
Uruzgan	4698	N/A	2024	9773	383%	6%	63%
Farah	1700	2288	10240	7694	-25%	5%	68%
Balkh	1108	2495	10837	7100	-34%	4%	72%
Day Kundi	2445	N/A	2581	7044	173%	4%	77%
Rest of the Country	38867		31459	38390	22%	23%	100%
Rounded Total	80000	131000	104000	165000	59%		

2007 witnessed a further concentration of opium cultivation in the South and West of Afghanistan. Between 2006 and 2007, cultivation increased in the South by 31% and in the West by 72%. In 2007, the South accounted for 69% of Afghanistan's cultivation and the West 15%, meaning that together the South-West accounted for 84% of the country's opium cultivation. Meanwhile, cultivation fell by 78% in the North and by 68% in the North-East. Though cultivation rose in the East and Centre by 148% and 48% respectively, cultivation there was eclipsed by the sheer scale of cultivation in the South and West. In 2007, the North accounted for just 3% of Afghanistan's total opium cultivation, the North East for 3%, the East for 11% and the Centre for 0%.²⁵

By province, Helmand saw a 48% increase in cultivation in 2007 and accounted for over half (53%) of Afghanistan's total opium cultivation. Kandahar increased cultivation by a third and Nimroz and Farah, in the West, recorded 233% and 93% increases respectively. Outside the South and West, only Nangahar province was a major opium cultivator, with 10% of the total (a 285% increase on 2006). According to the UNODC's *Opium Survey 2007*, Helmand had become "the world's biggest source of illicit drugs, surpassing the output of entire countries like Colombia (coca), Morocco (cannabis), and Myanmar (opium)".²⁶ The following tables from the UNODC's 2007 *Opium Survey* reveal the concentration of poppy cultivation in the South and West of Afghanistan:

²⁴ UNODC, [Afghanistan Opium Survey 2006](#)

²⁵ UNODC, [Afghanistan Opium Survey 2007](#)

²⁶ UNODC, [Afghanistan Opium Survey 2007](#), p iv

Table 1: Regional distribution of opium poppy cultivation, 2006-2007

Region	2006 (ha)	2007 (ha)	Change 2006-2007	2006 as % of total	2007 as % of total
Southern Region	101,900	133,546	+31%	62%	69%
Northern Region	22,574	4,882	-78%	14%	3%
Western Region	16,615	28,619	+72%	10%	15%
North-East Region	15,234	4,853	-68%	9%	3%
Eastern Region	8,312	20,581	+148%	5%	11%
Central Region	337	500	+48%	0%	0%
Rounded Total	165,000	193,000	+17%	100%	100%

Source: UNODC *Afghanistan Opium Survey 2007*

Table 2: Main opium poppy cultivation provinces in Afghanistan (ha), 2007

Province	2003	2004	2005	2006	2007	Change 2006-2007	% Total in 2007	Cumulative %
Hilmand	15,371	29,353	26,500	69,324	102,770	+48%	53%	53%
Nangarhar	18,904	28,213	1,093	4,872	18,739	+285%	10%	63%
Kandahar	3,055	4,959	12,989	12,619	16,615	+32%	9%	72%
Farah	1,700	2,288	10,240	7,694	14,865	+93%	8%	79%
Uruzgan	4,698	N/A	2,024	9,773	9,204	-6%	5%	84%
Nimroz	26	115	1,690	1,955	6,507	+233%	3%	87%
Rest of the country	36,246	66,072	49,464	58,763	24,281	-59%	13%	100%
Rounded Total	80,000	131,000	104,000	165,000	193,000	17%		

Source: UNODC *Afghanistan Opium Survey 2007*

In its *Opium Survey 2007*, the UNODC described Afghanistan as a “divided country” and observed that “a fault-line now divides the country, with opium cultivation trends moving in opposite directions”.²⁷ It said:

In centre-north Afghanistan, despite massive poverty, opium cultivation has diminished. The number of opium-free provinces more than doubled, from 6 last year to 13 in 2007. A leading example is the province of Balkh, where opium cultivation collapsed from 7,200 hectares last year to zero today. Other Afghan provinces should be encouraged to follow the model of this northern region where leadership, incentives and security have led farmers to turn their backs on opium.

In south-west Afghanistan, despite relatively higher levels of income, opium cultivation has exploded to unprecedented levels. This year around 70% of the country’s poppies were grown in five provinces along the border with Pakistan.²⁸

²⁷ UNODC, *Afghanistan Opium Survey 2007*, p iii

²⁸ UNODC, *Afghanistan Opium Survey 2007*, p iii

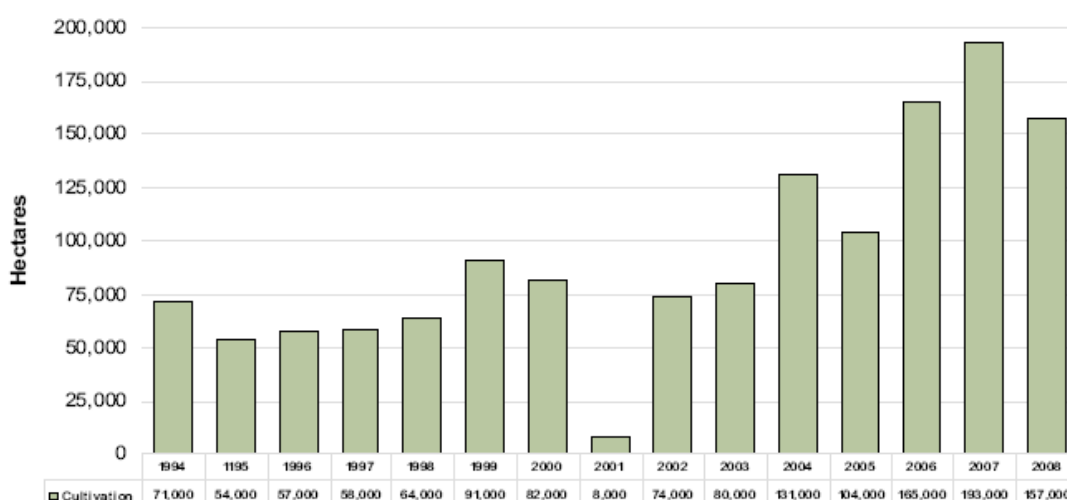
4 Trends in opium production in Afghanistan in 2008

4.1 Reductions in cultivation and production

In its latest *Opium Survey*, published in August 2008, the UNODC reported a modest fall in opium cultivation and production in Afghanistan from the peak recorded in 2007. In 2008, the amount of land dedicated to opium cultivation fell to 157,000 hectares, from the 193,000 hectares recorded the previous year – a 19% decrease and a fall in the proportion of Afghan agricultural land devoted to opium cultivation from 4.27% to 2.05%.²⁹ The quantity of opium produced in 2008 was 6% lower than in the previous year – 7,700 metric tons compared with 8,200 metric tons. This was not as dramatic a drop as the 19% fall in cultivation due to the greater yields achieved – 48.8 kilograms of opium per hectare (kg/ha) in 2008 compared with 42.5 kg/ha the previous year. According to the UNODC, if all of the 7,700 metric tons of opium produced in 2008 was converted into heroin, using a 7:1 ratio of opium to heroin, the 2008 crop would have produced around 1,100 metric tons of heroin.³⁰

The number of provinces affected by poppy cultivation fell in 2008 from 21 to 16 provinces, and then number of poppy-free provinces increased from 13 to 18. In turn, this means that no opium is grown in more than half of Afghanistan's now 34 provinces. The number of households involved in opium cultivation, meanwhile, fell by 28%, from 509,000 in 2007 to 366,500 in 2008 and the number of persons involved decreased from 3.3 million to 2.4 million, meaning that 10% of the Afghan population was involved in opium cultivation compared with 14.3% the previous year. Between 2007 and 2008, Afghanistan's GDP increased from US\$ 7.5 billion to US\$10.2 billion, an increase of 36%. At the same time, though in part fuelled by a reduction in the price of opium, the total farm gate value of opium fell from US\$ 1 billion in 2007 to US\$ 723 million in 2008, a 27% decrease. Together, Afghanistan's rising GDP and falls in the price of opium meant that the total farm gate value of opium as a percentage of Afghan GDP fell from 13% to 7% in 2008.³¹ The following graphs from reveal the modest falls in both opium cultivation and production recorded in 2008:

Figure 1: Opium poppy cultivation in Afghanistan (ha), 1994-2008



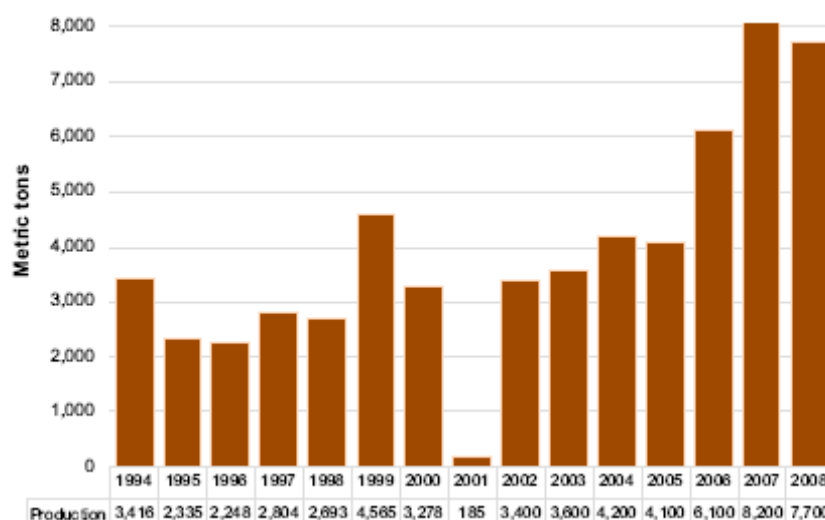
Source: UNODC *Afghanistan Opium Survey 2008*

²⁹ UNODC, [Afghanistan Opium Survey 2008](#)

³⁰ UNODC, [Afghanistan Opium Survey 2008](#)

³¹ UNODC, [Afghanistan Opium Survey 2008](#)

Figure 2: Potential opium production in Afghanistan (metric tons), 1994-2008



Source: UNODC *Afghanistan Opium Survey 2008*

4.2 Further concentration of opium production in the South

In line with previous trends, the UNODC's 2008 *Opium Survey* recorded a further concentration of opium cultivation and production in the South and West of the country. Indeed, it claims that, in 2008, 98% of all opium cultivation is confined to seven provinces in the South and West – Helmand, Kandahar, Uruzgan, Zabul, Farah and Nimroz – compared with 84% the previous year.³²

Helmand province alone accounted for two-thirds (66%) of the total opium cultivated in Afghanistan, with 103,500 hectares. Between 2002 and 2008, cultivation in Helmand has more than tripled and, according to the UNODC, "a lot of the land outside the traditional agricultural areas has been reclaimed for the sole purpose of opium cultivation in Hilmand [sic]". Although cultivation in Kandahar province fell by 12% between 2007 and 2008, cultivation in the province has nevertheless tripled since 2004. Similarly, while there was a 5% fall in cultivation in Nimroz province, cultivation there had also more than tripled since 2006. In Farah province there was a 1% increase in cultivation in 2008 compared with 2007 and cultivation has almost doubled since 2006.³³ The following tables from the UNODC's report highlight both the overall distribution of poppy cultivation in Afghanistan and between the five most :

³² UNODC, [Afghanistan Opium Survey 2008](#)

³³ UNODC, [Afghanistan Opium Survey 2008](#)

Table 1: Distribution of opium poppy cultivation in Afghanistan by region, 2007- 2008

Region	2007 (ha)	2008 (ha)	Change 2007-2008	2007 (ha) as % of total	2008 (ha) as % of total
Southern	133,546	132,760	-1%	69%	84%
Northern	4,882	766	-84%	3%	0.5%
Western	28,619	22,066	-23%	15%	14%
North-eastern	4,853	200	-96%	3%	0.1%
Eastern	20,581	715	-97%	11%	0.5%
Central	500	746	49%	0.3%	0.5%

Source: UNODC *Afghanistan Opium Survey 2008*

Table 2: Main opium poppy cultivating provinces in Afghanistan (ha), 2008

Province	2003	2004	2005	2006	2007	2008	Change 2007-2008	% Total in 2008
Hilmand	15,371	29,353	26,500	69,324	102,770	103,590	1%	66%
Kandahar	3,055	4,959	12,989	12,619	16,615	14,623	-14%	9%
Farah	1,700	2,288	10,240	7,694	14,865	15,010	1%	10%
Uruzgan	4,698	N/A	2,024	9,773	9,204	9,939	7%	6%
Nimroz	26	115	1,690	1,955	6,507	6,203	-5%	4%

Source: UNODC *Afghanistan Opium Survey 2008*

By contrast, opium production outside the South and West of the country decreased markedly. According to the UNODC, in 2008 opium production decreased by 82% in the North, by 97% in the North East, and by 96% in the East. Moreover, highlighting the regional discrepancies yet further, the UNODC found that the total volume of opium production in the North, North East and East was just 93 metric tons, which is just over 1% of the total opium production of Afghanistan.³⁴

There is a corresponding regional difference in the number of families involved in opium cultivation. As noted above, the total number of households involved in growing poppy in 2008 was 366,000, a reduction of 28% over the previous year. Of these, 266,862, or 73%, were in the southern region of Helmand, Kandahar, Uruzgan, Zabul and Day Kundi, and 18% in the western region of Nimroz and Farah, meaning that 91% of all the families involved in opium production were based in the South and West.³⁵

5 Outlook for 2009

On 2 February 2009, the UNODC published its *Opium Winter Assessment* for Afghanistan, which anticipates cultivation and production trends for the year ahead. Following the small overall decreases in opium cultivation and production in 2008, the UNODC anticipates a further decrease in opium cultivation in 2009.³⁶ Its report says that there are no provinces which are likely to show and increase in cultivation, and that the 18 provinces which were

³⁴ UNODC, [Afghanistan Opium Survey 2008](#), p 10

³⁵ UNODC, [Afghanistan Opium Survey 2008](#), p 12

³⁶ UNODC, [Afghanistan: Opium Winter Assessment](#), p iv

reported as poppy free in 2008 were likely to remain so in 2009, with the possibility of a further four provinces – Badakhshan, Baghlan, Faryan and Hirat – becoming poppy-free in 2009 if timely poppy elimination is carried out in the spring. The UNODC predicts that the provinces in the South and West of Afghanistan will remain, by far, the largest opium producing provinces in 2009, but that all would record falls in overall production. Compared with its 98% share of Afghanistan's total poppy cultivation in 2008, the UNODC expects the South and West to account for 90% of the total over the next year. Helmand Province is likely to show a decrease in poppy cultivation, but, according to the UNODC, is set to remain the largest opium producing province in Afghanistan in 2009. The UNODC attributes the expected lower levels of cultivation to a fall in the price of opium as well as a scarcity of water following the 2008 drought.³⁷ Launching the 2009 assessment, Antonio Mario Costa, the Executive Director of the UNODC, said:

A positive development in that opium cultivation is down [...] The 18 provinces that were opium free in 2008 are likely to remain that way in 2009, and four others [...] could join them with timely elimination this spring. This will deepen the trend of the past few years that showed opium cultivation overwhelmingly concentrated in the seven most unstable provinces in the south and south west. Even in major poppy growing provinces like Hilmand, UNDOC expects some decrease in 2009. [...]

In the south and south-west, reduced opium cultivation is due to high wheat prices, low opium prices, and low availability of water due to severe drought. [...]

Nevertheless, the drugs trade remains a major source of revenue for anti-government forces and organised crime operating in and around Afghanistan. Drug money is also a lubricant for corruption that contaminates power. [...]

The opium trend is going in the right direction, but there must be long term structural changes: to eradicate poverty, not just poppies; to root out corruption, not just illicit crops; and to strengthen human security in the process of reducing the threat posed by drugs and crime. Progress depends on more than reducing the amount of opium hectareage: it depends on improving security, integrity, economic growth, and governance. We must concentrate on winning long-term campaigns, not just short-term battles.³⁸

6 Relationship between opium production and the Taliban insurgency

The regional variations in opium cultivation in Afghanistan, particularly the concentration of cultivation and production in the South and West, reflect the security situation in the country, implying a close relationship between cultivation and the Taliban insurgency. Poppy cultivation in Afghanistan is increasingly concentrated in the areas of the country in which security is most fragile, the Taliban is strongest, and the NATO, UN and Afghan government presence is weakest.

In terms of security, Afghanistan is divided in two. In the relatively stable West and North, which comprises about 60% of the territory, security problems are linked to factionalism and criminality and, according to the UK Defence Secretary, Des Browne, there are “no or very few major security incidents”.³⁹ In the much more dangerous South and East there is an

³⁷ UNODC, [Afghanistan: Opium Winter Assessment](#)

³⁸ UNODC, [Afghanistan: Opium Winter Assessment](#)

³⁹ Statement on Afghanistan by the Secretary of State for Defence, HC Deb c675-90, 16 June 2008

increasingly coordinated insurgency, linked to the Taliban. The Pentagon reports two different types of insurgency in the south and east:

In 2008, there is the potential for two distinct insurgencies in Afghanistan; a Kandahari-based insurgency dominated by the Taliban in the south and a more complex, adaptive insurgency in the east. The eastern insurgency is a loose confederation of affiliates such as the Haqqani Network and like-minded groups that are prepared to cooperate with the Taliban's Kandahari-based insurgency. These groups include al-Qaeda, Hizb-e Islami Gulbuddin, and Pakistani militant groups Jaish-e Mohammed, Lashkar-e-Tayyiba, Tehrik Nefaz-i-Shariat Muhammad. Their shared goals include the expulsion of all foreign military forces from Afghanistan, the elimination of external government influence in their respective areas, and the imposition of a religiously conservative, Pashtun-led government.⁴⁰

In evidence to the Defence Committee's 2007 report on *UK operations in Afghanistan*, the UK's Afghan Drugs Inter-Departmental Unit (ADIDU) stated:

Both the drug traffickers and the Taleban have a common interest in resisting Afghan government authority and international forces. There are indications of extensive financial and logistical links between Taleban and traffickers at all levels. A recent raid by Afghan counter narcotics forces on a laboratory found an insurgent training manual and weapons.

In its response to the Defence Committee's report, the MoD said:

In the South of Afghanistan, both the drug traffickers and the Taliban have a common interest in resisting Afghan government authority and international forces. There are indications of extensive financial and logistical links between Taliban and traffickers at all levels. The Taliban have encouraged farmers to grow opium poppy and resist Afghan government eradication efforts.⁴¹

The UNODC's *2008 Opium Survey* also emphasised the growing link between poppy cultivation and the insurgency. It noted that:

Anti-government elements as well as drug traders are very active in this region. Provinces in the south are the stronghold of anti-government elements, while provinces in the west (Farah and Nimroz) are known to have organized criminal networks.⁴²

Its 2007 report argued that the North-South divide in Afghanistan in terms of both security and opium cultivation demonstrated that:

opium cultivation in Afghanistan is now closely linked to insurgency. The Taliban today control vast swathes of land in Hilmand, Kandahar and along the Pakistani border. By preventing national authorities and international agencies from working, insurgents have allowed greed and corruption to turn orchards, wheat and vegetable fields into poppy fields [...]

the Taliban are again using opium to suit their interests. Between 1996 and 2000, in Taliban-controlled areas 15,000 tons of opium were produced and exported – the regime's sole source of foreign exchange at that time. In July 2000, the Taliban leader, Mullah Omar, argued that opium was against Islam and banned its cultivation (but not

⁴⁰ US Department of Defense, *Report on Progress toward Security and Stability in Afghanistan*, Report to Congress, 27 June 2008

⁴¹ Government response, para 31, p 9

⁴² UNODC, *Afghanistan Opium Survey 2008*, p 19

its export). In recent months, the Taliban have reversed their position once again and started to extract from the drug economy resources for arms, logistics and militia pay.⁴³

In February 2008, a report on the opium economy in Afghanistan, published jointly by the UK Department for International Development and the World Bank, also highlighted the link between opium cultivation and the insurgency. It said:

Ominously, the links and synergies between opium poppy and insecurity are becoming increasingly apparent. Estimates suggest that the size of the opium economy is significant at approximately 30% of licit GDP, and opium is thus Afghanistan's leading economic activity. [...] There should be no illusions about the prospects for quick success against opium, particularly if conflict and insecurity continue in many parts of the country. [...]

The opium economy thrives in remote or insecure areas where markets for other crops are lacking. The coincidence of growing insecurity in the southern region and increasing levels of opium poppy cultivation highlights the fact that opium poppy is a low-risk crop in a high-risk environment. [...]

Generally, opium is at its most concentrated in conditions of insecurity and where rural people cannot otherwise earn a decent livelihood.⁴⁴

The February 2008 World Bank / DFID report explains why opium is the "best choice under conditions of insecurity".⁴⁵ It explained that:

Under circumstances of insecurity, opium markets work best. Under conditions of insecurity, traders of legal agricultural goods face a marked increase in the potential for crop losses due to delays caused by roadblocks or fighting, and they are unlikely to purchase agricultural products at the farm gate or provide advances. Insecurity deters travel due to the increase in transportation costs it imposes, and also due to genuine concerns over physical security. By contrast, opium markets work well: opium traders provide advances, travel to the farm gate to purchase the crop and cover the costs of transport and bribes to those manning the check posts. They also take the physical risk of travel in insecure areas. [...]

And in an insecure environment, opium is the best crop choice. Opium poppy thrives in an insecure environment: it is a low-risk crop in a high-risk environment. It is a high-value, low-weight commodity which traders are still willing to purchase at the farm gate and, if the security situation worsens, opium provides a liquid asset that can be easily transported by a fleeing family. In this environment it makes little sense to cultivate other crops even where there is the potential to do so. Indeed, the larger than average landholdings, plentiful irrigation, good soils, as well as a proximity to the provincial markets experienced by many farmers in an area such as central Helmand or Qandahar matter little when insecurity due to actions on the part of both insurgents and the government threatens the personal and economic security of the local population.⁴⁶

The World Bank / DFID report also explains how violence, anti-government violence and corruption "lock farmers into opium in the South" of Afghanistan:

⁴³ UNODC, *Afghanistan Opium Survey 2007*, p iii-iv

⁴⁴ *Afghanistan: Economic incentives and development initiatives to reduce opium production*, World Bank and DFID, February 2008, pp 1-3

⁴⁵ *Afghanistan: Economic incentives and development initiatives to reduce opium production*, World Bank and DFID, February 2008, p 76

⁴⁶ *Afghanistan: Economic incentives and development initiatives to reduce opium production*, World Bank and DFID, February 2008, p 76

The causal relationship between violence and opium is not at all clear-cut, but once violence has set in, it feeds the opium business, and chances for a “development solution” shrink, especially where government officials also are corrupt. Opium production is associated with insecurity, conflict, corruption and increasingly anti-government violence in Afghanistan, yet opium and violence are not intrinsically linked. Corruption, insecurity and violence all exist in areas where opium poppy is not grown, and in Afghanistan predate the recent exponential rise in opium poppy cultivation in the southern provinces. Certainly in Afghanistan in the past, and currently in other parts of the country, the drugs trade has not been linked with such high levels of violence. The intensity of the conflict in the south most likely originated in an unplanned and unforeseen conjunction between politically motivated anti-government activity and local opportunistic opium production and trade that then deteriorated in a spiral of violence, in which anti-government elements were able to portray themselves as “protectors” of the security of the rural population. But the other endemic factors, particularly corruption, enter into the equation as well. Both government officials and anti-government elements ended up in second-order conflicts over the extraction of revenues from the opium trade.⁴⁷

The report, therefore, concluded that “the lesson is that ensuring security is the overriding consideration” in combating the opium trade.

The link between the narcotics trade and the Taliban insurgency was also explicitly highlighted by President Bush. In a speech to the American Enterprise Institute in February 2007, the then US President said that “poppy cultivation that is aiding the Taliban” and warned that the opium trade:

is a direct threat to a free future for Afghanistan. [...] The Taliban uses drug money to buy weapons -- they benefit from this cultivation -- and they pay Afghans to take up arms against the government.⁴⁸

The link between the narcotics trade and the Taliban insurgency was also made clear in a recent report by the US Department of Defence (DoD). Published on 3 February 2009, the DoD’s report to Congress on the situation in Afghanistan said:

Narcotics-related activities fuel the insurgency in Afghanistan, threaten the legitimacy of the GIRoA [Government of the Islamic Republic of Afghanistan], and threaten the long-term stability of the country and surrounding region. [...] Despite some positive metrics and significant efforts and resources on the part of the US, the international community, and some Afghan government officials, overall progress in CN has been inadequate. This slow progress is due to the difficult economic, security, and governance conditions in the country. Afghans often lack economically viable alternatives to growing poppies. In many areas, the narcotics industry is closely linked to the insurgency; hence the lack of overall security allows narco-trafficking to flourish. The absence of an established rule of law also aids narco-traffickers, as the narcotics industry is linked to and abetted by high levels of corruption within the GIRoA. A lack of coordination among the Afghan and international entities contributing to CN activities has further hampered progress.⁴⁹

⁴⁷ *Afghanistan: Economic incentives and development initiatives to reduce opium production*, World Bank and DFID, February 2008, p 77

⁴⁸ President Bush discusses Progress in Afghanistan, Global war on terror, 15 February 2007, White House website: <http://www.whitehouse.gov/news/releases/2007/02/20070215-1.html>

⁴⁹ Progress toward security and stability in Afghanistan, US Department of Defense Report to Congress, January 2009

The attached map from the UNODC's *Afghanistan Opium Survey 2008* (see Appendix 1) reveals the strong correlation between areas of instability and areas of opium cultivation. The darker pink shaded areas are areas of "extreme risk" and shaded circles show levels of opium cultivation; the bigger the circle, the greater the levels of cultivation.