



UNDCP

AFGHANISTAN

OPIUM POPPY SURVEY 2002

Pre-Assessment

**Monitoring of
Opium
Production in
Afghanistan**

**United Nations
International Drug
Control Programme
(UNDCP)**

**Country Office for
Afghanistan**



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Summary

The UNDCP Country Office for Afghanistan, with the support of the UNDCP Illicit Crop Monitoring Programme (ICMP), conducted a pre-assessment survey of opium poppy cultivation in Afghanistan from 1 to 10 February 2002. The findings confirm that, after the considerable decline recorded in 2001, opium poppy cultivation has resumed to a relatively high level in Afghanistan.

A sample of 208 villages in 42 districts were surveyed in the traditional opium poppy growing areas of Southern and Eastern Afghanistan, in the provinces of Helmand, Qandahar, Oruzgan, Nangarhar and Kunar. Those five provinces accounted for 84% of the total opium poppy cultivation area in Afghanistan in 2000. The northern region of Afghanistan was not included in the pre-assessment survey because the colder climate in that area usually delays the opium poppy planting season and cultivation is not observable clearly.

Based on the findings of this limited survey, and assuming that poppy cultivation also resumed in provinces not covered by the pre-assessment, it is estimated that opium poppy cultivation in Afghanistan could cover an area between 45,000 ha and 65,000 ha in 2002.

This range of estimates compares to the levels of cultivation reached during the mid-1990s, but remains lower than those recorded in 1999 (about 90,500 ha) and 2000 (about 82,000 ha).

Based on an average national yield of 41 kg/ha over the past 8 years, the resulting production of opium harvested between March and August 2002 in Afghanistan could reach between 1,900 and 2,700 metric tons of opium (1999: about 4,600 mt - 2000 : about 3,300 mt).

The Afghan Interim Administration banned opium poppy cultivation on 17 January 2002. At that time, however, most opium poppy fields had already been sown. Although most farmers interviewed during the pre-assessment survey said they were uncertain currently about being able to harvest opium this spring because of the ban, the currently high prices offered by local traders create a powerful incentive.

A comprehensive survey covering all opium poppy growing villages in Afghanistan will be conducted by UNDCP during the opium poppy flowering and opium harvesting period, from April to May 2002 in Southern and Eastern Afghanistan, and from June to August 2002 in Northern Afghanistan. This census survey will provide detailed data and more precise estimates of opium poppy cultivation and opium production in 2002. The results of the comprehensive survey will be released in September 2002.

Background

UNDCP has been implementing annual opium surveys in Afghanistan since 1994. The surveys are conducted in all known poppy growing villages during the opium poppy flowering and opium harvesting period, from March to August.

Annual Estimates of the Total Opium Poppy Cultivation Area in Afghanistan (ha)

1994	1995	1996	1997	1998	1999	2000	2001
71,470	53,759	56,824	58,379	63,674	91,583	82,515	7,606

The Southern and Eastern provinces of Helmand and Nangarhar accounted for approximately three-quarters of all opium production in Afghanistan during the 1990s.

The Taliban regime was in control of the major opium producing areas of Afghanistan since 1996. During the summer of 2000, they issued a ban on opium poppy cultivation that resulted in a considerable decrease of opium production in 2001. The period that followed the events of 11 September 2001 and the subsequent fall of the Taliban regime coincided with the opium poppy planting season in Southern and Eastern Afghanistan. By 17 January 2002, when the Afghan Interim Administration issued a new ban on opium poppy cultivation, farmers had apparently already sown their fields with opium poppy.

To verify anecdotal evidence about the resurgence of poppy cultivation in the country and to try and forecast the likely extent of opium poppy cultivation in 2002, the UNDCP Country Office for Afghanistan, with the support of the UNDCP Illicit Crop Monitoring Programme (ICMP), implemented a pre-assessment survey in early February 2002.

A comprehensive survey covering all opium poppy growing villages in Afghanistan will be conducted by UNDCP during the opium poppy flowering and opium harvesting period, from April to May 2002 in Southern and Eastern Afghanistan, and from June to August 2002 in Northern Afghanistan. This census survey will provide detailed data and more precise estimates on opium poppy cultivation and opium production in Afghanistan in 2002. The results of the comprehensive survey will be released in September 2002.

The survey will include the North-Western region (centred around Mazar-e-Sharif) where opium poppy cultivation has also been reported, and the North-Eastern region (Badakhshan) which was not included in the pre-assessment because the higher altitude of this area create climatic conditions which delay the planting season and do not permit the observation of any cultivation in February.

Methodology

The pre-assessment survey provides an early assessment of the extent of poppy cultivation in Afghanistan in 2002. It does not replace the annual opium poppy survey that will be conducted from April to August in all known opium poppy growing villages. The results of the annual survey, expected in September 2002, will provide more precise estimates of poppy cultivation in Afghanistan.

The pre-assessment field work was conducted from 1 to 10 February 2002 in a sample of 208 villages of 42 districts of 5 provinces of Southern and Eastern Afghanistan (see map of districts surveyed). Forty-two surveyors were involved in the village survey.

Number of districts and villages surveyed

	Provinces	# Districts surveyed	# Villages surveyed
South-Western Region	Helmand	12	58
	Oruzgan	4	19
	Qandahar	4	21
Eastern Region	Nangarhar	19	90
	Kunar	3	20
		42	208

The districts surveyed were selected on the basis of previous survey data, and, together, accounted for 84% of the total poppy cultivation in Afghanistan in 2000. The top ten of these districts accounted for 51% of total national area while the top twenty of these districts accounted for 71% of the total area in 2000. The year 2001 was not used as a reference because, following the Taliban ban, opium poppy cultivation had almost entirely disappeared in these areas.

In each district surveyed, about 5 villages were selected among those growing opium poppy in 2000. This represents 6% of the total number of villages identified as growing opium poppy in 2000 in the same areas.

In each village surveyed, the number of poppy fields was counted and the average field size estimated to derive the total village area under poppy cultivation.

Aggregated at the provincial level, the 2002 data were compared with the 2000 estimates for the same villages. The comparisons provided provincial poppy cultivation trends from which the 2002 forecasts were established.

In addition to the data collected in the selected villages, the surveyors were also requested to scan the districts to which they were assigned and to provide a descriptive account opium poppy cultivation in these districts. This kind of rapid district assessment was conducted in Laghman and Balkh provinces. The province of Badakhshan was not included in the pre-assessment because the higher altitude of this area creates climatic conditions which delay the planting season and do not permit the observation of any cultivation at this time of the year.

The surveyors, one per district, had already participated in previous UNDCP opium surveys in Afghanistan and went through a one-day training prior to the field work. They were supervised by three National Officers recruited under the project AFG98 "Monitoring of Opium Production in Afghanistan".

The whole exercise was under the technical supervision of UNDCP's Illicit Crop Monitoring Programme (ICMP). ICMP's Programme Management Officer conducted field missions in Nangarhar, Qandahar and Helmand provinces, debriefed the surveyors at the end of their assignment and, together with the National Project Coordinator, analyzed the data.

Findings

The pre-assessment survey conducted in 208 villages of 42 districts of Afghanistan in early February 2002 confirmed anecdotal evidence that, after the considerable decline recorded in 2001, opium poppy cultivation has resumed to a relatively high level in Afghanistan.

Based on the data and information collected, the forecasts for the area under opium poppy cultivation in 5 provinces range as follows:

2002 Poppy Cultivation Forecasts

	Province	Lower Forecast	Higher Forecast
South-Western Region	Helmand	25,000 ha	35,000 ha
	Oruzgan	2,000 ha	4,000 ha
	Qandahar	1,000 ha	2,000 ha
Eastern Region	Nangarhar	12,000 ha	18,000 ha
	Kunar	500 ha	1,000 ha
		40,500 ha	60,000 ha

Together these 5 provinces accounted for 84% of the total area under poppy cultivation in 2000. Assuming that poppy cultivation has also resumed in areas not visited during the pre-assessment survey, the total area under poppy cultivation in Afghanistan in 2002 would be between 45,000 ha and 65,000 ha.

This range of estimates compares to the levels of cultivation reached during the mid-1990s, but remains lower than those recorded in 1999 (about 90,500 ha) and 2000 (about 82,000 ha).

Based on an average national yield of 41 kg/ha over the past 8 years, the resulting production of opium harvested between March and August 2002 in Afghanistan could reach between 1,900 and 2,700 metric tons of opium (1999: about 4,600 mt - 2000 : about 3,300 mt).

The Afghan Interim Administration banned opium poppy cultivation on 17 January 2002. At that time, however, most opium poppy fields had already been sown. Although most farmers interviewed during the pre-assessment survey said they were not certain currently about being to harvest opium this spring because of the ban, the currently high prices offered by local traders for opium create a powerful incentive.

Opium Prices in Afghanistan (USD/kg)

	Feb. 2000	Nov. 2000	Feb. 2001	Sep. 2001	Nov. 2001	Dec. 2001	Jan. 2002	Feb. 2002
E. Region	43	107	214	655	402	316	423	409
S-W Region	30	60	162	570	350	275	407	395
					Sowing period			

On local opium markets, which are still trading old opium stocks, the prices between November and December 2001, were about four times higher than at the same time the previous year. Since opium is an important source of cash income, the farmers with experience in poppy cultivation began to sow poppy on their fields for the 2002 opium harvest season.

Some farmers were offered cash advances on their forthcoming opium crop. This type of credit, known as 'salaam', is a common practice in the local opium trade. This year, however, it seems more limited than in previous years, probably because most farmers still have to reimburse past advances. The uncertain environment in which this year's opium harvest will take place, probably also deterred traders from providing large advances.

Wheat was planted shortly after poppy and occupied most of the cultivated land. However in some villages, poppy was reported to cover up to 70% of the presently cultivated land.

South-Western Region (Helmand, Qandahar, Oruzgan)

Authorities closed the opium market of Qandahar city in early 2002, but the more important opium markets of Musa Qala and Sarban Qala districts (Helmand province) were still active at the time of this survey. In these two districts, large numbers of opium poppy fields were noted. According to the surveyor of Musa Qala district (himself a native of this district), the area under poppy cultivation is likely to be even higher in this district in 2002 than in 2000.

Musa Qala district and Kunar province (in Eastern region) are the only regions where opium poppy cultivation has been reported to be higher than in 2000.

The large agricultural fields of Nad-e-Nali and part of Nahr-e-Saraj district (in Helmand province) are watered by a modern and vast irrigation scheme established some 30 years ago. These two districts alone accounted for 15% of the total poppy cultivation in 2000. Poppy cultivation has resumed there as well, although to a lesser extent than in 2000.

In Kajaki district (Helmand province), some farmers re-ploughed their wheat fields that had just germinated in January to sow opium poppy instead. In Tirin Kot and Dehrawud districts (Oruzgan province) a few farmers were still sowing opium poppy in January.

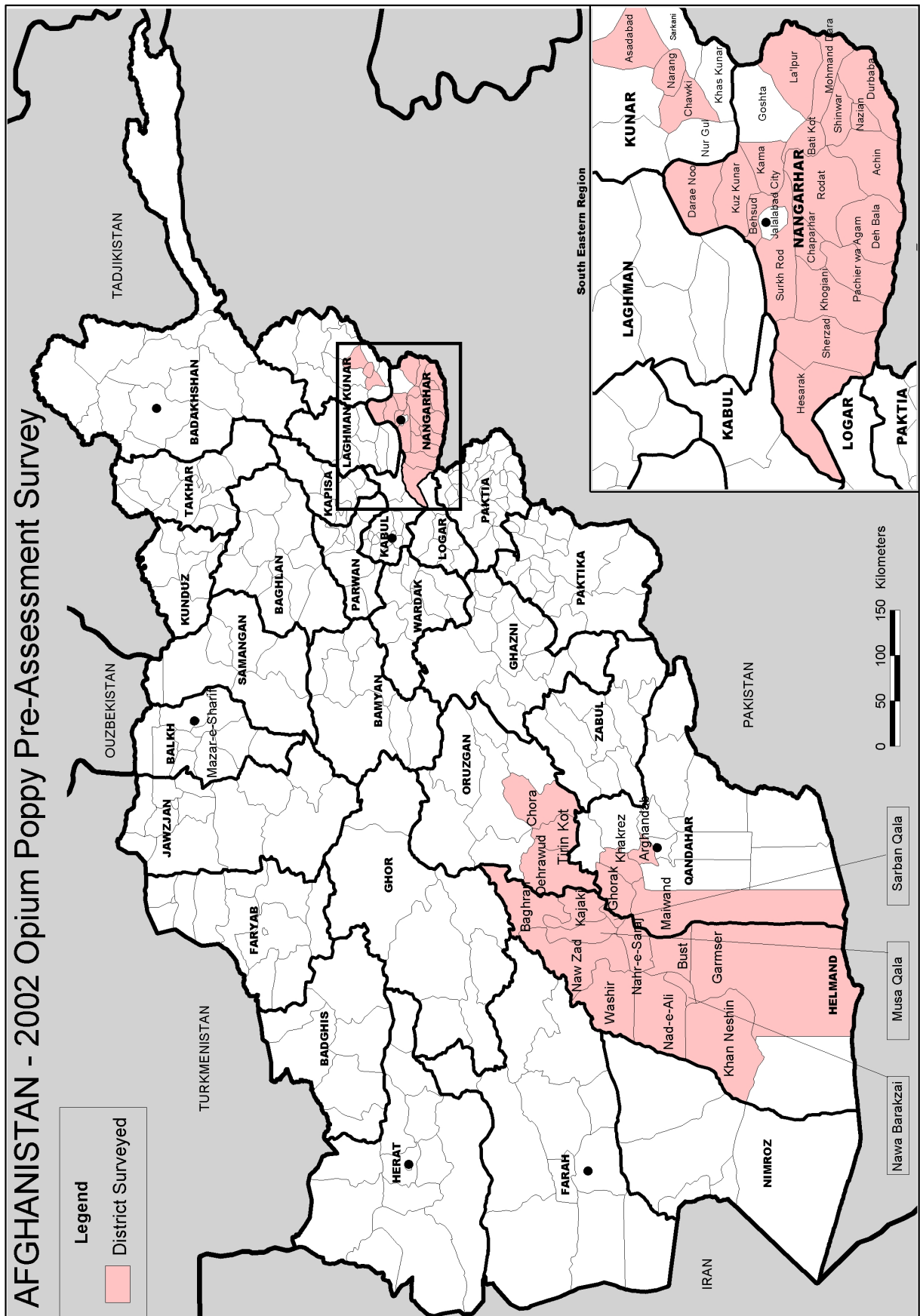
Although not included in the pre-assessment, the provinces of Herat and Ghor were also reported to have opium poppy cultivation.

Eastern Region (Nangarhar, Kunar)

Opium poppy cultivation has resumed in the previously important opium producing districts of Khogiani, Achin, Beh Sud, Rodat, Sherzad, Shinwar and Sorkh Rod. In Shinwar district, the opium market of Ghani Khel is still active. In some areas irrigated by the main canal near Jalalabad city, opium poppy fields accounted for about 20% of the presently cultivated land.

In Kunar province, some farmers sowed wheat and opium poppy on the same fields but are now weeding out the wheat. In this province, opium poppy cultivation is expected to be higher than in 2000 because it expanded from the remote valleys to the main irrigated areas of the province.

Annex 1



Annex 2

List of Districts and Number of Villages Surveyed

PROVINCE	DISTRICT	# villages sured	Total number of villages growing poppy in 2000	%	
SOUTH WEST REGION					
HELMAND	BAGHRAN	5	198		
	BUST	5	53		
	GARMSER	4	105		
	KAJAKI	5	183		
	KHAN NESHIN	5	41		
	MUSA QALA	4	112		
	NAD-E-ALI	5	210		
	NAHR-E-SARAJ	5	90		
	NAW ZAD	5	128		
	NAWA BARAKZAI	5	106		
	SARBAN QALA	5	86		
	WASHIR	5	85		
	HELMAND TOTAL		58	1,397	4%
	ORUZGAN	CHAR CHASHMA	5	73	
CHORA		5	51		
DEHRAWUD		5	72		
TIRIN KOT		4	84		
ORUZGAN TOTAL		19	280	7%	
QANDAHAR	GHORAK	5	67		
	KHAKREZ	6	157		
	ARGHANDAB	5	61		
	MAIWAND	5	196		
QANDAHAR TOTAL		21	481	4%	
SOUTH EAST REGION					
KUNAR	ASADABAD	10	53		
	CHAWKI	5	29		
	NARANG	5	23		
KUNAR TOTAL	KUNAR	20	105	19%	
NANGARHAR	ACHIN	4	130		
	BATI KOT	5	56		
	BEHSUD	5	70		
	CHAPARHAR	5	81		
	DARAE NOOR	3	50		
	DEH BALA	4	78		
	DURBABA	5	32		
	HESARAK	5	76		
	KAMA	4	49		
	KHOGIANI	5	122		
	KUZ KUNAR	4	52		
	LA'LPUR	5	34		
	MOHMAND DARA	5	38		
	NAZIAN	4	33		
	PACHIER WA AGAM	5	71		
	RODAT	9	64		
	SHERZAD	5	90		
	SHINWAR	4	47		
SORKH ROD	4	103			
NANGARHAR TOTAL		90	1,276	7%	
	TOTAL	208	3,539	6%	