



Afghanistan Opium Survey 2008

Executive Summary



data collection

data transfer

data transfer

August 2008

ABBREVIATIONS

AEF	Afghan Eradication Force
ANP	Afghan National Police
GPS	Global Positioning System
ICMP	Illicit Crop Monitoring Programme (UNODC)
MCN	Ministry of Counter-Narcotics
RAS	Research and Analysis Section (UNODC)
UNODC	United Nations Office on Drugs and Crime

ACKNOWLEDGEMENTS

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The implementation of the survey would not have been possible without the dedicated work of the field surveyors, who often faced difficult security conditions.

The UNODC Illicit Crop Monitoring activities in Afghanistan were made possible by financial contributions from the European Commission and the Governments of Finland, Norway, the United Kingdom and the United States of America.

This report is dedicated to the memory of Fazal Ahmad, MCN/UNODC who was part of the team carrying out the dangerous task of verifying opium eradication statistics and lost his life in the process.

The report is also dedicated to all the others who have lost their lives in the cause of building peace in Afghanistan.

Afghanistan

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Foreword

A receding flood?

The opium flood waters in Afghanistan have started to recede. This year, the historic high-water mark of 193,000 hectares of opium cultivated in 2007 has dropped by 19% to 157,000 hectares. Opium production declined by only 6% to 7,700 tonnes: not as dramatic a drop as cultivation because of greater yields (a record 48.8 kg/ha against 42.5kg in 2007). Eradication was ineffective in terms of results (only 5,480 ha and about one quarter of last year's amount), but very costly in terms of human lives.

Also the data collection for this *Afghan Opium Survey* turned into tragedy as one of our colleagues perished in a suicide attack. Hence the decision to dedicate this work to him, and all those who have died in Afghanistan for the cause of democracy and security.

Since last year, the number of opium-free provinces has increased by almost 50%: from 13 to 18. This means that no opium is grown in more than half of the country's 34 provinces. Indeed, 98% of all of Afghanistan's opium is grown in just seven provinces in the south-west (Hilmand, Kandahar, Uruzgan, Farah, Nimroz, and to a lesser extent Daykundi and Zabul), where there are permanent Taliban settlements, and where organized crime groups profit from the instability. This geographical overlap between regions of opium and zones of insurgency shows the inextricable link between drugs and conflict. Since drugs and insurgency are caused by, and effect, each other, they need to be dealt with at the same time – and urgently.

The most glaring example is Hilmand province, in the south, where 103,000 ha of opium were cultivated this year – two thirds of all opium in Afghanistan. If Hilmand were a country, it would once again be the world's biggest producer of illicit drugs.

By contrast, Nangarhar, Afghanistan's second highest opium producing province in 2007, has become poppy free. This is a remarkable accomplishment, the first time it happens in the country's modern history.

What made the flood recede?

Success in 2008 can be attributed to two factors: good local leadership and bad weather.

First, strong leadership by some governors, for example in Badakshan, Balkh and Nangarhar, discouraged farmers from planting opium through campaigns against its cultivation, effective peer pressure and the promotion of rural development. They deserve tangible recognition. Religious leaders, elders and *shura* also deserve credit for becoming increasingly effective in convincing farmers not to grow opium, not least because it is against Islam.

Second, drought contributed to crop failure, particularly in the north and north-west where most cultivation is rain-fed. The same drastic weather conditions also hurt other crops, like wheat, increasing significantly its domestic price. This, combined with the global impact of rising food prices, is creating a food crisis. Yet, higher farm-gate wheat prices (because of shortages), and lower farm-gate opium prices (because of excess supply) have significantly improved the terms of trade of food: this may provide further incentive to shift crops away from drugs.

Winning back Afghanistan, province by province

To ensure that the opium flood recedes even further, several practical measures are needed.

- *Regain control of the West.* The policy of winning back Afghanistan province by province has proven successful. The goal for 2008 was to make many more provinces, and especially Nangarhar and Badakshan, opium free. This has been achieved. The goal for 2009 should be to win back Farah and Nimroz (as well as Zabul and Day Kundi) where opium cultivation and

insurgency are lower than in the south. Because of low productivity, the economic incentive to grow opium in this region is lower than in the country's more fertile south.

- *Reward good performance.* Prevention is less costly (in terms of human lives and economic means) than manual eradication. Governors of opium free provinces, and those who may join them in 2009, need to be able to deliver on their promises of economic assistance. Aid should be disbursed more quickly, avoiding the transaction costs of national and international bureaucracy. The revenue from licit crops has improved in both absolute and relative terms. The gross income ratio of opium to wheat (per hectare) in 2007 was 10:1. This year it has narrowed to 3:1.
- *Feed the poor.* Afghanistan, already so poor, faces a food crisis. In addition to long-term development assistance, Afghan farmers and urban dwellers urgently need food aid. If such food is purchased domestically and redistributed, as UNODC has long been calling for, this would further improve the terms of trade of licit crops.
- *Stop the cannabis* With world attention focussed on Afghan opium, benign neglect has turned Afghan cannabis into a low risk/high value cash crop. There is no point in reducing opium cultivation if farmers switch to cannabis. This is happening in some of the provinces that are opium free (for example in the north). The issue needs to be seriously researched and addressed. Although in gross terms opium cultivation is most remunerative, today in Afghanistan one hectare of cannabis generates even greater net income (because of opium's high labour cost.)
- *Build integrity and justice.* Drug cultivation, production, and trafficking are carried out on an enormous scale thanks to collusion between corrupt officials, landowners, warlords and criminals. Until they all face the full force of the law, the opium economy will continue to prosper with impunity, and the Taliban will continue to profit from it. It is the task of development agencies and military operations to maintain economic growth and improve security. These measures should be complemented by equally robust efforts towards good governance, efficient administration and honest judiciary: these efforts have yet to gain momentum.
- *Find the missing opium.* While Afghan opium cultivation and production are declining, in 2008 (and for the third year in a row) its supply far outweighs world demand. Current domestic opium prices (US\$70 at farm-gates) show that this market is responding only slowly to economic conditions. Such an inelastic price response suggests that vast amounts of opium, heroin and morphine (thousand of tons) have been withheld from the market. We know little about these stockpiles of drugs, besides that (as reported in the *Winter Survey*) they are not in the hands of farmers. These stockpiles are a time bomb for public health and global security. As a priority, intelligence services need to examine who holds this surplus, where it may go, and for what purpose.
- *Catch the most wanted.* In line with Security Council Resolutions 1735 and 1822, the Afghan government, assisted by other countries, should bring to justice the most wanted drug traffickers who are bankrolling terrorism and insurgency. Member states have yet to demonstrate willingness to comply with the Security Council's decisions, for example by seeking extradition of the criminals who sow death among their youth.
- *Stop the precursor chemicals.* In line with another Security Council resolution (1817 of July 2008) Member States agreed to step up efforts to stop the smuggling of precursor chemicals used in Afghanistan to process heroin. During the past few months, increased joint operations have resulted in larger seizures of acetic anhydride bound for Afghanistan. Yet, the risks and the costs of producing heroin are still too low in Afghanistan and west Asia.
- *Regional security.* Most of the opium-producing areas in Afghanistan are located along the Iranian and, especially, the Pakistani borders. Greater counter-narcotics cooperation between

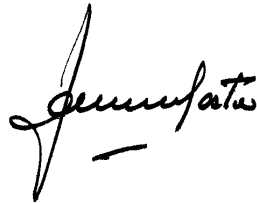
the three countries, as well as Central Asia and the Gulf, would disrupt drug smuggling and money laundering.

Hold the course

Afghanistan's opium problem is big, but more and more localized to a handful of provinces in the south-west. To reduce the problem further, farmers, provincial governors, and district officials need to receive incentives and face deterrents in order not to grow poppy. Stronger security, rule of law and development assistance are urgently needed.

The time to act is now. Unlike coca, opium is a seasonal plant. In a few weeks, farmers will decide whether or not to plant opium for the 2008/09 harvest.

Afghan society has started to make progress in its fight against opium. Farmers now recognize that the risk/reward balance is tilting against growing opium. Local administrators and religious leaders have started to deliver. It is up to the central government to provide the leadership, security, justice and integrity needed for further progress: a politically sensitive and yet crucial requirement as the young Afghan democracy enters another election period.

A handwritten signature in black ink, appearing to read 'Antonio Maria Costa', with a horizontal line underneath.

Antonio Maria Costa
Executive Director
UNODC

2008 Annual Opium Poppy Survey in Afghanistan

Fact Sheet

	2007	Difference on 2007	2008
Net opium poppy cultivation (after eradication)	193,000 ha	-19%	157,000 ha
In percent of agricultural land	4.27%		2.05%
In percent of global cultivation	82%		N/A
Number of provinces affected by poppy cultivation	21		16
Number of poppy free provinces	13		18
Eradication	19,047 ha	-71%	5,480 ha
Weighted average opium yield	42.5 kg/ha	+15%	48.8 kg/ha
Potential production of opium	8,200 mt	-6%	7,700 mt
In percent of global production	93%		N/A
Number of households involved in opium cultivation	509,000	-28%	366,500
Number of persons involved in opium cultivation	3.3 million	-28%	2.4 million
In percent of total population (23 million) ¹	14.3%		10%
Average farm gate price (weighted by production) of fresh opium at harvest time	US\$ 86/kg	-19%	US\$ 70/kg
Average farm gate price (weighted by production) of dry opium at harvest time	US\$ 122/kg	-22%	US\$ 95/kg
Afghanistan GDP ²	US\$ 7.5 billion	+36%	US\$ 10.2 billion
Total farm gate value of opium production	US\$ 1 billion	-27%	US\$ 732 million
In percent of GDP	13%		7%
Total export value of opium to neighboring countries	US\$ 4 billion		N/A
In percent of GDP	53%		N/A
Household average yearly gross income from opium of opium poppy growing families	US\$ 1965	+2%	US\$ 1997
Per capita gross income from poppy growing for opium poppy growing farmers	US\$ 302	+2%	US\$ 307
Current Afghanistan GDP per capita	US\$ 310	+34%	US\$ 415
Indicative gross income from opium per ha	US\$ 5200	-10%	US\$ 4662
Indicative gross income from wheat per ha	US\$ 546	+198%	US\$ 1625

¹ Source: Afghan Government, Central Statistical Office.

² Source: Afghan Government, Central Statistical Office, preliminary estimate.

Summary findings

The total opium cultivation in 2008 in Afghanistan is estimated at 157,000 hectares (ha), a 19% reduction compared to 2007. Unlike previous years, 98% of the total cultivation is confined to seven provinces with security problems: five of these provinces are in the south and two in the west of Afghanistan.

Of the 34 provinces in the country, 18 were poppy free in 2008 compared to 13 in 2007. This includes the eastern province of Nangarhar, which was the number two cultivator in 2007 and now is free from poppy cultivation. At the district level, 297 of Afghanistan's 398 districts were poppy free in 2008. Only a tiny portion of the total cultivation took place in the north (Baghlan and Faryab), north-east (Badakhshan) and east (Kunar, Laghman and Kapisa). Together these regions counted for less than two per cent of cultivation. The seven southern and western provinces that contributed to 98% of Afghan opium cultivation and production are Hilmand, Kandahar, Uruzgan, Daykundi, Zabul, Farah and Nimroz. This clearly highlights the strong link between opium cultivation and the lack of security.

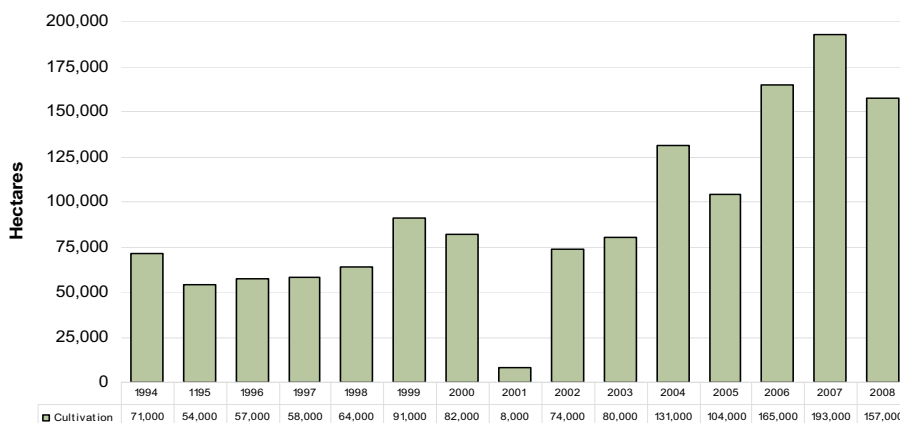
The total opium production in 2008 is estimated at 7,700 metric tons (mt), a 6% reduction compared to production in 2007. Almost all of the production (98%) takes place in the same seven provinces where the cultivation is concentrated and where the yield per hectare was relatively higher than in the rest of the country. All the other provinces contributed only 2% of total opium production in the country.

The gross income for farmers who cultivated opium poppy is estimated at US\$ 732 million in 2008. This is a decrease from 2007, when farm-gate income for opium was estimated at US\$ 1 billion.

Opium poppy cultivation decreases by 19% in 2008

The area under opium poppy cultivation in Afghanistan decreased by 19% in 2008, from 193,000 ha in 2007 to 157,000 ha, 98% of which is confined to seven provinces in the south and the west.

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



The Opium Winter Assessment Survey 2008 (implemented in January/February 2008) anticipated a slight reduction in opium cultivation (UNODC, *Afghanistan Opium Winter Rapid Assessment Report*, February 2008). The full Opium Survey shows that the cultivation has reduced more than expected thanks to successful counter-narcotic efforts in the northern and eastern provinces of Afghanistan. This decline was also a result of unfavorable weather conditions that caused extreme drought and crop failure in some provinces, especially those in which agriculture is rain-fed.

In areas where the cultivation decline has been the result of the severe drought, there are real challenges for the Government and international stakeholders to sustain the declining cultivation trend. There is an urgent need to mobilize support to meet short term and long term needs of the farmers affected by the drastic weather conditions.

Eighteen provinces have been found to be free of poppy and cultivation. In eastern and northern provinces cultivation was reduced to negligible levels. The province of Nangarhar, which was once the top producing province, has become poppy free for the first time since the systematic monitoring of opium started in Afghanistan in the early 1990s. 2008 also presents a stark contrast because Nangarhar cultivated as much as 18,739 ha only last year.

The regional divide of opium cultivation between the south and rest of the country continued to sharpen in 2008. Most of the opium cultivation is confined to the south and the west, which are dominated by insurgency and organized criminal networks. This corresponds to the sharper polarization of the security situation between the lawless south and relatively stable north. Hilmand still remains the dominant opium cultivating province (103,500 ha) followed by Kandahar, Uruzgan, Farah and Nimroz.

A major difference in the regional distribution of 2007 and 2008 cultivation is that cultivation in the east (Nangarhar, Kunar and Laghman) has dropped to insignificant levels in 2008. Compared to a total of 19,746 ha of opium cultivation in 2007, in 2008 the eastern region is estimated to have cultivated only 1,150 ha.

Number of opium poppy free provinces increases to 18 in 2008

The number of opium poppy free provinces increased to 18 in 2008 compared to 13 in 2007 and six in 2006. These poppy free³ provinces are shown in the table below:

Central region	Ghazni*,Khost*, Logar*, Nuristan*, Paktika*, Paktya*, Panjshir*, Parwan*, Wardak*
North region	Balkh*, Bamyan*, Jawzjan, Samangan*, Sari Pul
North-East region	Kunduz*, Takhar
East region	Nangarhar
West region	Ghor

* Poppy free provinces in 2007 and 2008

Encouragingly, all the provinces which were poppy free in 2007 remained poppy free in 2008. Campaigns against poppy cultivation, effective law enforcement implementation by the Government, and alternative development assistance to farmers contributed to the increase in the number of poppy free provinces. Prevailing conditions of drought, as noted above, also played a part in making opium cultivation negligible in the rain-fed areas of northern Afghanistan (Faryab and Badakhshan).

³ A region is defined as poppy free when it is estimated to have less than 100 ha of opium cultivation.

Nangarhar becomes poppy free for the first time in the history of UN opium monitoring in Afghanistan

Nangarhar was traditionally a large poppy growing province and in 2007 it was estimated to have 18,739 ha of opium cultivation. In 2008, Nangarhar province became poppy free for the first time since the UN began opium cultivation monitoring in Afghanistan,

In 2004, poppy cultivation in Nangarhar was 28,213 ha; in 2005, it fell to 1,093 ha. In 2006, it increased to 4,872 ha but could only be found in very remote parts of the province.

Kunar and Laghman provinces also showed a considerable reduction (35% and 24% respectively) in poppy cultivation in 2008. In both provinces, opium poppy cultivation (amounting each to less than 500 ha) was restricted to remote areas that are difficult to access. Kapisa also experienced a considerable reduction of 45% in opium cultivation. However, this is a province with a high security risk and a higher percentage of agricultural land if compared to Kunar and Laghman. These factors increase the challenges of sustaining the reduction next year.

The poppy free status of Nangarhar and reduced cultivation in Kunar and Laghman show an effective provincial leadership in implementing control measures to stop poppy cultivation in the eastern region

North and North-East Afghanistan show drastic reduction in opium cultivation

Northern Afghanistan also shows successes in terms of poppy free status and reduced cultivation. The total reduction in poppy cultivation in the north and north-east regions is 84 and 96% respectively compared to 2007.

In north and north-east Afghanistan, the amount of opium cultivation is estimated to be very low affecting only three provinces, namely Faryab (289 ha), Baghlan (475 ha) and Badakhshan (200 ha). The rest of the provinces in northern region (Balkh, Bamyan, Jawzjan, Samangan, Saripul, Kunduz and Takhar) are poppy free.

The drought in 2008 affected not only opium cultivation but other agricultural production as well. In particular, it caused the failure of the rain-fed wheat crop, which resulted in serious difficulties for farmers. As a consequence, food prices have escalated in Afghanistan. If emergency food aid and massive development aid are not extended to the northern, central and eastern parts of the country (especially Nangarhar), there is a serious risk of a backlash next year. Many farmers are losing the cash income they used to receive from opium, and at the same time they have to buy wheat and other food items at very high prices. This poses considerable challenges in keeping the region poppy free in the near future.

98% of opium poppy cultivation is restricted to the South and South-West

The number of security incidents increased sharply in the last three years, especially in the south and south-west of Afghanistan. Over the same period, and in the same regions, opium cultivation showed the same sharp increase. In 2008, 98% of opium cultivation is confined to seven provinces in the south and west, namely Hilmand, Kandahar, Uruzgan, Zabul, Farah and Nimroz. Security conditions are extremely poor in those provinces.

Hilmand still remains the single largest opium cultivating province with 103,500 ha (66% of total cultivation in Afghanistan) almost at the same level as 2007. Between 2002 and 2008, cultivation in Hilmand province more than tripled. A lot of land outside the traditional agricultural areas has been reclaimed for the sole purpose of opium cultivation in Hilmand.



Photo 1

Photo 1 shows an area on the right side of the canal which has been newly reclaimed as agricultural land for opium cultivation. Farmers in Hilmand appear to be able to afford the high expenses needed to reclaim land for opium cultivation.



Photo 2

Photo 2 shows agriculture land in Nad Ali district which is well developed with ample irrigation facilities. This area is known for its intensive opium cultivation. The picture shows wheat and poppy in the sprouting stage. Wheat can be distinguished from opium because of its darker green colour.

In Kandahar province, opium cultivation was 14,623 ha in 2008 (a reduction of 12% from 2007) but remaining significantly higher than in 2006. The increase in opium cultivation started in the year 2004 when only 4,959 ha were cultivated. Since then, the area under opium poppy has tripled. The total area under opium in Zabul increased by 45% reaching 2,335 ha in 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%

In 2008 there was a 5% decrease in opium cultivation in Nimroz province (6,203 ha) compared to last year. Cultivation in Nimroz was three times as high as in 2006. The majority of the cultivation has always been located in Khash Rod district. Many new agricultural areas were developed in the northern part of this district since 2007, and a vast majority of them have been used for opium cultivation.

Opium cultivation in Farah amounted to 15,010 ha with a 1% increase compared to 2007 (14,865 ha) when the total area under opium poppy almost doubled compared to 2006 (7,694 ha). No eradication was carried out in this province despite the high opium cultivation. In 2002, the total cultivation in this province was only 500 ha.

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%

Table 3: Opium poppy cultivation (2004-2008) and eradication (2007-2008) in Afghanistan (ha) by region and province

PROVINCE	Cultivation 2004 (ha)	Cultivation 2005 (ha)	Cultivation 2006 (ha)	Cultivation 2007 (ha)	Cultivation 2008 (ha)	Change 2007-2008 (ha)	Change 2007-2008 (%)	Total area of eradication in 2007 (ha)	Total area of eradication in 2008 (ha)
Kabul	282	0	80	500	310	-190	-38%	14	20
Khost	838	0	133	0	0	0	0%	16	0
Logar	24	0	0	0	0	0	0%	0	0
Paktya	1,200	0	0	0	0	0	0%	0	0
Panjshir	0	0	0	0	0	0	0%	0	0
Parwan	1,310	0	124	0	0	0	0%	1	0
Wardak	1,017	106	0	0	0	0	0%	0	0
Ghazni	62	0	0	0	0	0	0%	0	0
Paktika	0	0	0	0	0	0	0%	0	0
Central Region	4,733	106	337	500	310	-190	-38%	31	20
Kapisa	522	115	282	835	436	-399	-48%	10	6
Kunar	4,366	1,059	932	446	290	-156	-35%	27	103
Laghman	2,756	274	710	561	425	-136	-24%	802	26
Nangarhar	28,213	1,093	4,872	18,739	0	-18,739	-100%	2,339	26
Nuristan	764	1,554	1,516	0	0	0	0%	0	3
Eastern Region	36,621	4,095	8,312	20,581	1,151	-19,430	-94%	3,178	164
Badakhshan	15,607	7,370	13,056	3,642	200	-3,442	-95%	1,311	774
Takhar	762	1,364	2,178	1,211	0	-1,211	-100%	781	0
Kunduz	224	275	102	0	0	0	0%	5	0
North-eastern Region	16,593	9,009	15,336	4,853	200	-4,653	-96%	2,097	774
Baghlan	2,444	2,563	2,742	671	475	-196	-29%	185	85
Balkh	2,495	10,837	7,232	0	0	0	0%	14	0
Bamyan	803	126	17	0	0	0	0%	0	0
Faryab	3,249	2,665	3,040	2,866	291	-2,575	-90%	337	0
Jawzjan	1,673	1,748	2,024	1,085	0	-1,085	-100%	122	0
Samangan	1,151	3,874	1,960	0	0	0	0%	0	0
Sari Pul	1,974	3,227	2,252	260	0	-260	-100%	114	0
Northern Region	13,789	25,040	19,267	4,882	766	-4,116	-84%	772	85
Hilmand	29,353	26,500	69,324	102,770	103,590	820	1%	4,003	1,416
Kandahar	4,959	12,989	12,619	16,615	14,623	-1,992	-12%	7,905	1,222
Uruzgan	11,080	2,024	9,703	9,204	9,939	735	8%	204	113
Zabul	2,977	2,053	3,210	1,611	2,335	724	45%	183	0
Day Kundi	0	2,581	7,044	3,346	2,273	-1,073	-32%	5	0
Southern Region	48,369	46,147	101,900	133,546	132,760	-786	-1%	12,300	2,751
Badghis	614	2,967	3,205	4,219	587	-3,632	-86%	232	0
Farah	2,288	10,240	7,694	14,865	15,010	145	1%	143	9
Ghor	4,983	2,689	4,679	1,503	0	-1,503	-100%	188	38
Hirat	2,531	1,924	2,287	1,525	266	-1,259	-83%	70	352
Nimroz	115	1,690	1,955	6,507	6,203	-304	-5%	35	113
Western Region	10,531	19,510	19,820	28,619	22,066	-6,553	-23%	668	511
Total (rounded)	131,000	104,000	165,000	193,000	157,000	-36,000	-19%	19,047	4,306

Potential opium production in Afghanistan declines to 7,700 mt in 2008

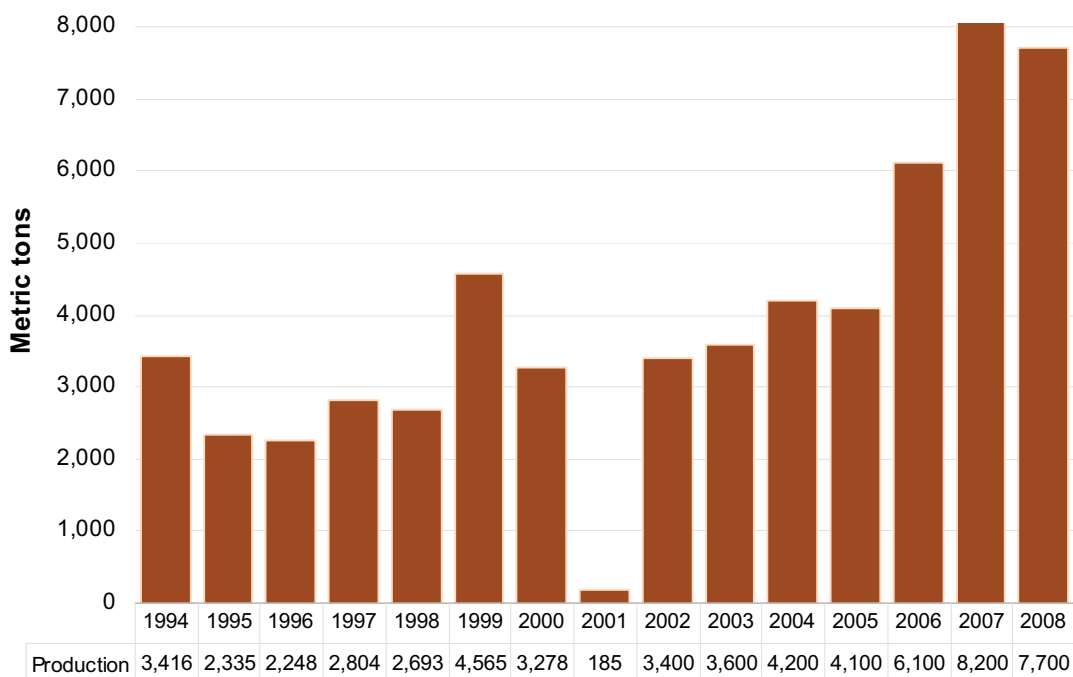
The average yield for Afghanistan in 2008 was 48.8 kg/ha compared to 42.5 kg/ha in 2007. This is the highest average yield estimated for Afghanistan since 2000.

The yield per hectare in the southern region is normally considerably higher than the rest of the country. Prior to 2008, there was significant opium cultivation outside the southern region which lowered the average national yield. In 2008, the region that accounted for 98% of the total national cultivation is the one with the highest yield.

Although the weather conditions were unfavorable for a second crop (spring cultivation) throughout the whole country, the first crop (fall cultivation) in south and south-west received adequate irrigation. These conditions naturally led to a reduced level of cultivation in 2008 and lower yields in the central and eastern regions, but they did not affect the yield in the south, where most of the cultivation was concentrated and where the yield actually increased.

Given the different distribution of the cultivation and yield, the 19% total decrease in cultivation resulted in a smaller 6% decrease in potential opium production which is estimated in 2008 at 7,700 mt. If all the opium were converted into heroin and using a 7:1 ratio as reported in previous studies, this would amount to 1,100 mt of heroin⁴.

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



Reflecting the distribution of the cultivation, almost 98% of the potential opium production took place in the south and south-west of Afghanistan in 2008. The opium production in Hilmand alone (5,397 mt) was higher than Afghanistan's total production in 2005 (4,100 mt).

⁴ It is estimated that the actual production of morphine and heroin in Afghanistan is about 30 to 40% less than the total 1,100 mt, since a significant amount of opium is exported to other countries without being processed in Afghanistan.

Table 4: Average opium yield in Afghanistan by region, 2007-2008

Region	2007 Average yield (kg/ha)	2008 Average yield (kg/ha)	Change
Central (Parwan, Paktya, Wardak, Khost, Kabul, Logar, Ghazni, Paktika, Panjshir)	51.9	36.2	-30%
East (Nangarhar, Kunar, Laghman, Nuristan, Kapisa)	45.2	39.3	-13%
North-east (Badakhshan, Takhar, Kunduz)	40.7	31.4	-23%
North (Bamyan, Jawzjan, Sari Pul, Baghlan, Faryab, Balkh, Samangan)	49.7	54.6	10%
South (Hilmand, Uruzgan, Kandahar, Zabul, Day Kundi)	42.2	52.1	23%
West (Ghor, Hirat, Farah, Nimroz, Badghis)	28.8	29.7	3%
Weighted national average	42.5	48.8	15%

Potential opium production in the southern region of Afghanistan increased in 2008 by 20% reaching 6,917 mt, which is equivalent to 90% of the production in the whole country. In western regions, potential opium production decreased by 32% to 655 mt. Opium production decreased by 82% in the northern region, by 97% in the north-east and by 96% in the eastern region. The total amount of production in north, north-east and east was only 93 mt, which is just over 1% of the total potential opium production of the country.

Table 5: Potential opium production⁵ by region and by province (metric ton), 2007-2008

PROVINCE	Production 2007 (mt)	Production 2008 (mt)	Change 2007-2008 (mt)	Change 2007-2008 (%)	REGION
Kabul	26	11	-15	-57%	Central
Khost	0	0	0	0%	Central
Logar	0	0	0	0%	Central
Paktya	0	0	0	0%	Central
Panjshir	0	0	0	0%	Central
Parwan	0	0	0	0%	Central
Wardak	0	0	0	0%	Central
Ghazni	0	0	0	0%	Central
Paktika	0	0	0	0%	Central
Central Region	26	11	-15	-57%	
Kapisa	40	17	-23	-58%	East
Kunar	18	11	-7	-38%	East
Laghman	20	17	-3	-15%	East
Nangarhar	1,006	0	-1006	-100%	East
Nuristan	0	0	0	0%	East
Eastern Region	1,084	45	-1039	-96%	
Badakhshan	152	6	-146	-96%	North-East
Takhar	43	0	-43	-100%	North-East
Kunduz	0	0	0	0%	North-East
North-eastern Region	195	6	-189	-97%	
Baghlan	36	26	-10	-28%	North
Balkh	0	0	0	0%	North
Bamyan	0	0	0	0%	North
Faryab	135	16	-119	-88%	North
Jawzjan	54	0	-54	-100%	North
Samangan	0	0	0	0%	North
Sari Pul	9	0	-9	-100%	North
Northern Region	233	42	-192	-82%	
Hilmand	4,399	5,397	998	23%	South
Kandahar	739	762	22	3%	South
Uruzgan	411	518	107	26%	South
Zabul	61	122	60	98%	South
Day Kundi	135	118	-17	-12%	South
Southern Region	5,745	6,917	1172	20%	
Badghis	100	17	-83	-83%	West
Farah	409	446	37	9%	West
Ghor	44	0	-44	-100%	West
Hirat	33	8	-25	-76%	West
Nimroz	372	184	-188	-51%	West
Western Region	959	655	-303	-32%	
Total (rounded)	8,200	7,700	-500	-6%	

⁵ Total national opium production is derived from the weighted average yield and total cultivation

10.3% of the total population is involved in opium cultivation

The total number of households involved in growing poppy in 2008 is estimated at 366,000, a reduction of 28% compared to 2007. Of these, 266,862 families (73%) were in the southern region (Hilmand, Kandahar, Uruzgan, Zabul and Day Kundi) and 18% in the western region (Nimroz and Farah). The percentage of opium cultivating families is negligible in the rest of the country.

Given an average of 6.5 members per household⁶, this represents an estimated total of about 2.38 million persons, or 10.3 % of Afghanistan's total population of 23 million⁷

In terms of the average size of fields dedicated to poppy cultivation per poppy-growing household, the southern region showed the biggest size (0.5 ha) compared to any other region.

Table 6: Number of families involved in opium cultivation in Afghanistan, 2008

Region	Opium poppy cultivation (ha)	Total no. of households growing poppy	Percentage of poppy growing households over total number of households	Average size of poppy fields per each household growing poppy- (ha)
Central	310	3,747	1%	0.08
Eastern	1,151	19,743	5%	0.06
North-eastern	200	6,218	2%	0.03
Northern	766	5,240	1%	0.15
Southern	132,760	266,862	73%	0.50
Western	22,066	64,674	18%	0.34
Total (rounded)	157,000	366,500	100%	0.43

Opium prices fall in 2008

In 2008, the weighted average farm-gate price of fresh opium at harvest time was US\$ 70/kg, which is 19% lower than in 2007 and almost one fifth of the price in 2001. Between 2007 and 2008 farm-gate prices of dry opium also fell by 22%, reaching US\$ 95/kg (weighted price) at harvest time.

The Afghanistan Government (Ministry of Counter-Narcotics) and UNODC (MCN/UNODC) have monitored opium prices on a monthly basis in various provinces of Afghanistan since 1994⁸. These monthly prices show a decreasing trend for farm-gate dry opium prices since the year 2004.

⁶ Source: Central Statistics Office, Government of Afghanistan.

⁷ Source: Central Statistics Office, Government of Afghanistan.

⁸ UNODC also started monitoring prices in two key provinces in 1997.

Figure 3: Average farm-gate price of dry opium (US\$/kg), September 2004 to July 2008

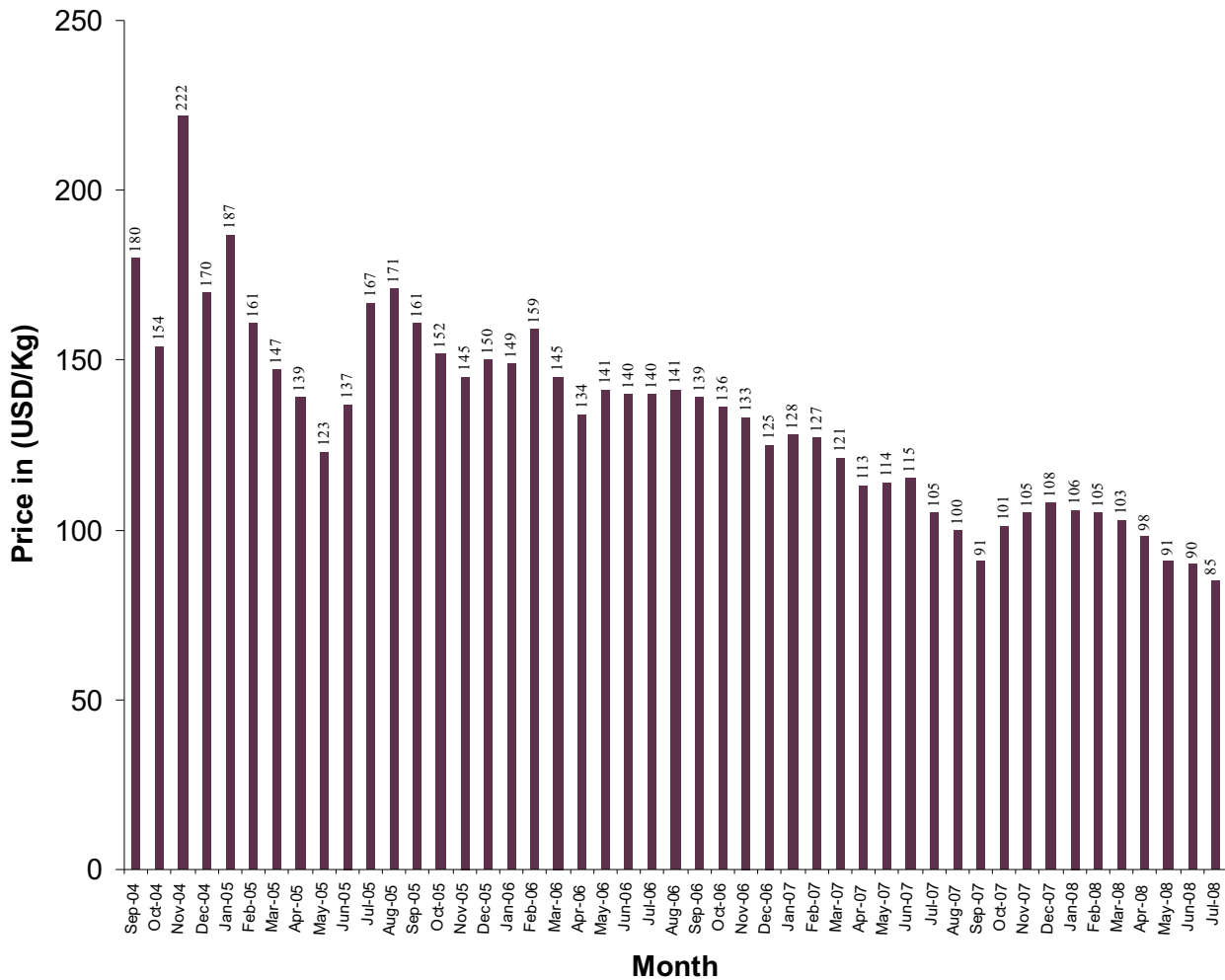
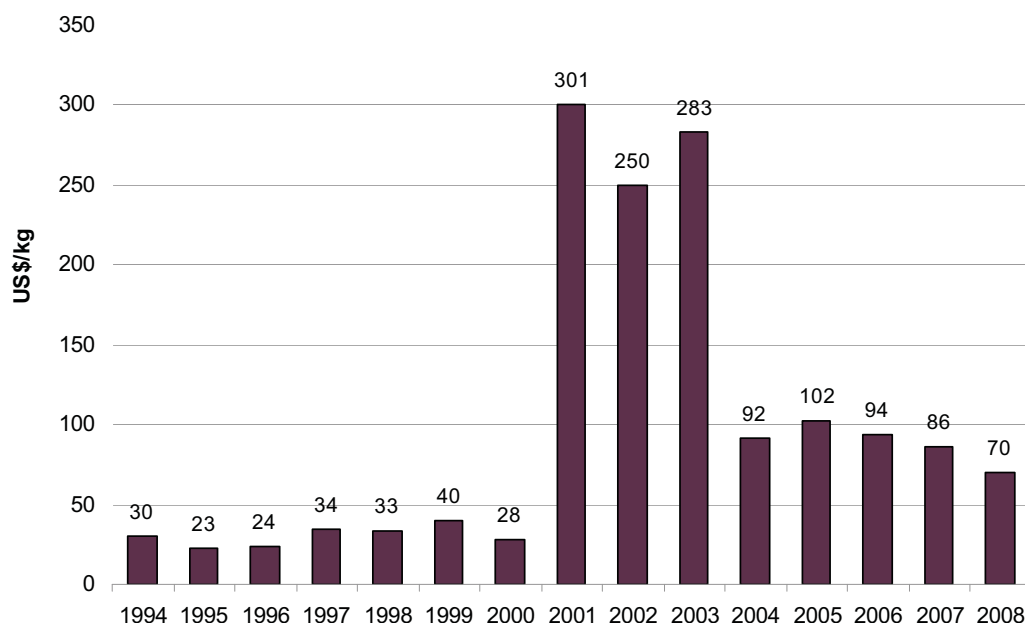


Figure 4: Fresh opium farm-gate prices at harvest time (weighted by production) in Afghanistan(US\$/kg), 1994-2008



Sources: UNODC, Opium Surveys 1994-2007

Table 7: Farm-gate prices of dry and fresh opium in Afghanistan at harvest time (US\$/kg) by region, 2008

Region	Average Fresh Opium Price (US\$)-2007	Average Fresh Opium Price (US\$)-2008	Change	Average Dry Opium Price (US\$)-2007	Average Dry Opium Price (US\$)-2008	Change
Central (Parwan, Paktya, Wardak, Khost, Kabul, Logar, Ghazni, Paktika, Panjshir)	124	133	7%	167	171	2%
Eastern (Nangarhar, Kunar, Laghman, Nuristan, Kapisa)	88	92	5%	168	117	-30%
North-eastern (Badakhshan, Takhar, Kunduz)	71	85	20%	86	72	-16%
Northern (Bamyan, Jawzjan, Sari Pul, Baghlan, Faryab, Balkh, Samangan)	71	56	-21%	90	72	-20%
Southern (Hilmand, Uruzgan, Kandahar, Zabul, Day Kundi)	85	69	-19%	115	94	-18%
Western (Ghor, Hirat, Farah, Nimroz, Badghis)	97	83	-14%	125	104	-17%
National average price weighted by production	86	70	-19%	122	95	-22%

Trends in average dry farm-gate prices vary according to regions. They decreased by 30% in eastern regions, while in other regions (except the central region), the decrease in dry farm-gate prices is between 16-20%. Opium prices increased by only 2% in the central region. The highest dry opium prices were reported in the central (US\$ 171/kg) and eastern regions (US\$ 117/kg).

One possible explanation for the general decreasing trend is that there is a surplus of opium due to the record production of 8,200 mt in 2007 and another significant production level of 7,700 mt in 2008. These production levels are above the estimated global demand of illicit opium⁹ suggesting that the surplus production has been accumulated as stocks.

It could be argued that given the production increases in 2006 and 2007 and the still high production in 2008, prices have not fallen as much as expected. A possible explanation could be that after the sharp decrease in opium poppy cultivation in Myanmar and Laos in recent years, opium from Afghanistan appears to be increasingly trafficked to China, India and South-East Asia, which were traditionally supplied by opium from the Golden Triangle.

Total farm-gate value of opium decreased by 27% to US\$ 732 million

Based on opium production and reported opium prices, the farm-gate value of the opium harvest amounted in 2008 to US\$ 732 million. The farm-gate value of opium as a proportion of GDP decreased in 2008 to 7% compared to 13% in 2007¹⁰.

Slight decrease of opium income for Hilmand farmers

In 2008, farmers in Hilmand earned a total of US\$ 513 million of income from the farm-gate value of opium. In 2007, the total opium income for farmers in Hilmand amounted to US\$ 528 million, an increase from the total US\$ 347 million estimated in 2006.

Several parts of the south and south-west are under the control of anti-government elements. Some of the 10% agricultural tax that is generally levied could thus provide revenue for these anti-government elements who, in turn, provide protection for poppy growing areas.

Reasons for cultivation/non-cultivation of opium poppy

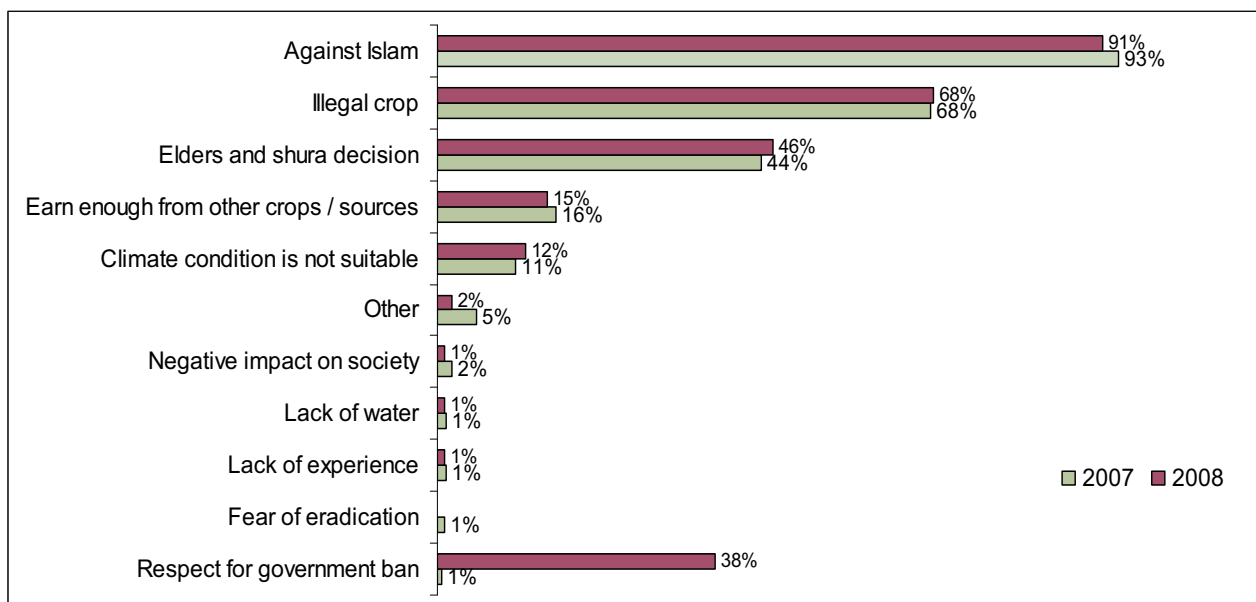
As part of the 2008 survey, 3,050 farmers in 1,529 villages across Afghanistan were asked about their reasons for cultivating, or not cultivating, opium poppy. Each farmer could provide more than one reason.

As in 2007, almost all farmers who never cultivated opium reported 'religion' as one of the reasons (91% of farmers in 2008 and 93% in 2007). A consistent number of farmers also reported 'illegality of the crop' (68% of farmers), and 'respect for a shura/elders decision' (46% of farmers). Based on these results, it could be argued that the majority of farmers who never cultivated poppy appear to be sensitive to the rule of law. In fact few farmers cited reasons related to income or climate for not growing poppy. This also shows that the cultural/religious pressure for not cultivating poppy can indeed be very strong.

⁹ *World Drug Report 2008*, UNODC

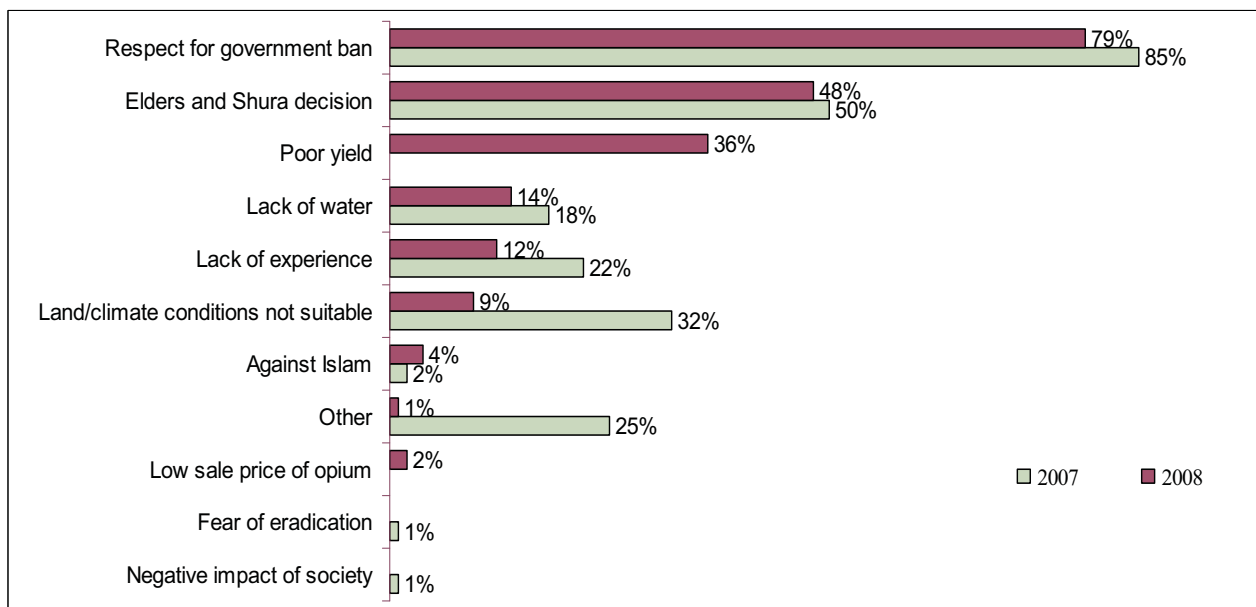
¹⁰ These percentages were calculated considering the 2007 GDP estimated by the Central Statistical Office of Afghanistan).at US\$ 10.2 billion.

Figure 5: Reasons for never having cultivated poppy (n=1488 farmers in 2007; n=1804 in 2008)¹¹



Among the farmers that grew poppy in the past but stopped, “respect for Government ban” is one of the reasons most commonly reported (79% of farmers), followed by “decisions of the elders and the Shura” (48%), and poor yield (36%). To a lesser extent farmers reported reasons related to weather or agricultural conditions.

Figure 6: Reasons for not having cultivated opium poppy in 2007 and 2008 (n=2261 in 2007; n=2521 in 2008)¹¹

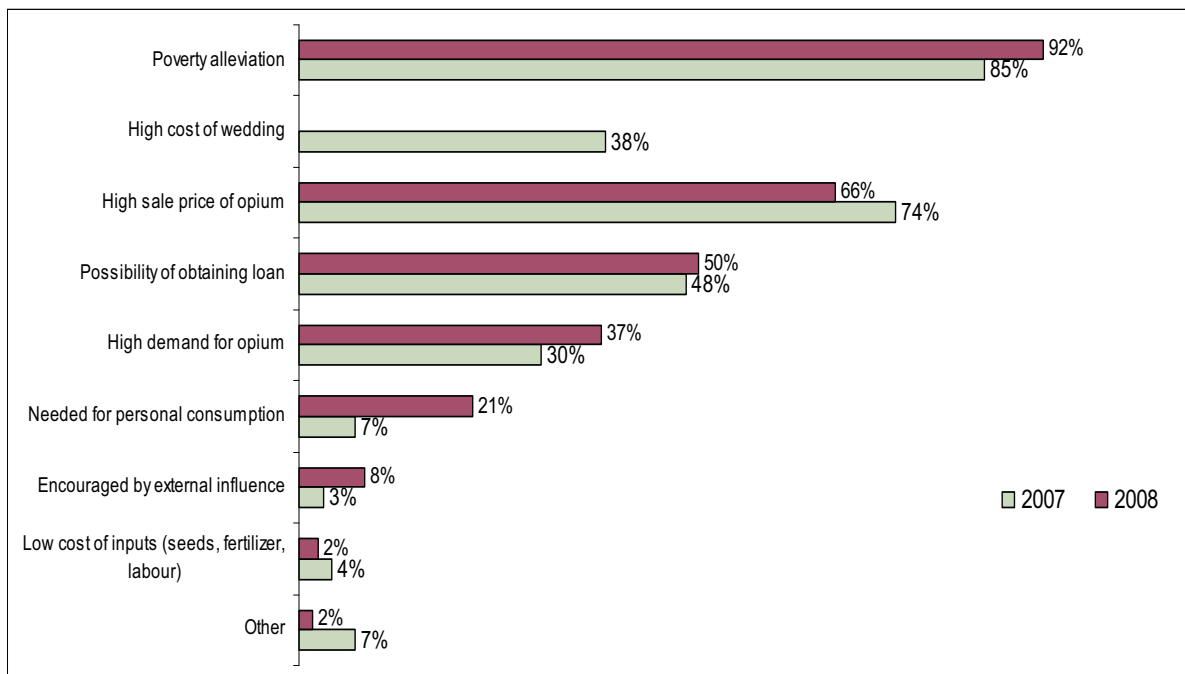


¹¹ The percentages add to more than 100 because farmers reported more than one reason. The presentation of the data differs from previous years. This year the percentage of each reported reason is presented as percentage of total number of farmers. Previous years data were reported as percentage of total number of responses (total number of responses were higher than the number of farmers because farmers reported more than one response).

Shura decisions, respect for Government ban and religion are less important in the south of Afghanistan compared to the other regions. In the eastern region, farmers appear to be more concerned about respecting the Government ban than in other regions.

One of the reasons reported by the majority of farmers for cultivating opium across the regions was ‘poverty alleviation’ (92% of farmers). Among the most common additional reasons provided were ‘high sale price of opium’ (66% of farmers) and ‘possibility of obtaining loans’(50% of farmers). In southern and western provinces, high sale price and poverty alleviation were the dominant reasons for opium cultivation while in the eastern region it was poverty alleviation.

Figure 7: Reasons for opium poppy cultivation in 2008 (n=718 in 2007; n=508 in 2008)¹²



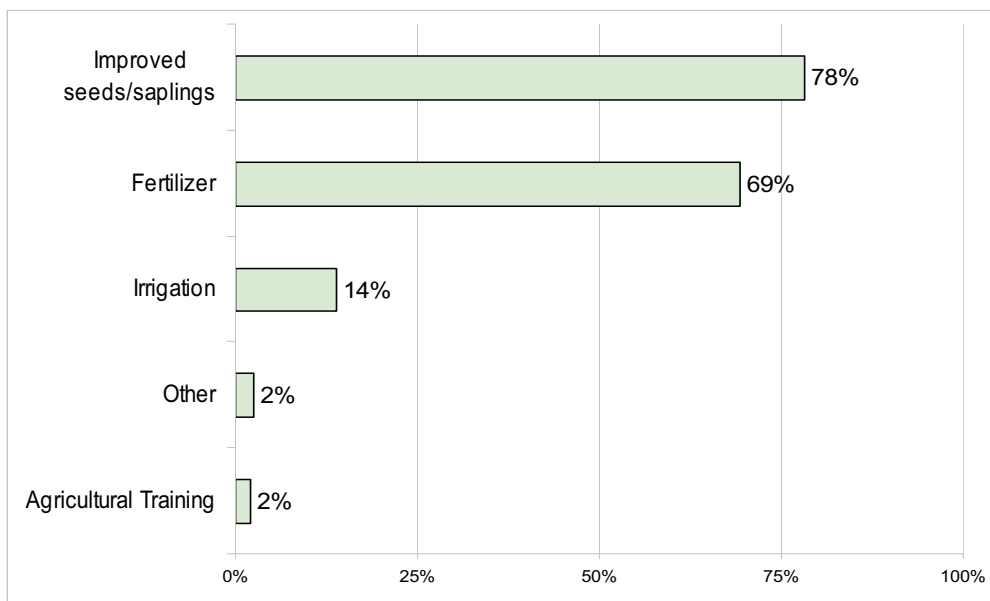
Agriculture assistance received by the farmer

In addition to farmers, headmen were interviewed in each of the 1,529 villages included in the survey. According to the information that they provided, 281 out of the 1,529 surveyed villages (18.4%) received agricultural assistance. The type of assistance varied and included improved seeds/saplings (78% of villages), fertilizers (69% of villages), irrigation facilities (14% of villages). Only 2% received agricultural training.

The majority (72%) of the villages which received agriculture assistance did not opt for poppy cultivation in 2008. However the remaining 28% still cultivated poppy despite receiving agricultural assistance.

¹² See footnote 11.

Figure 8: Type of agricultural assistance delivered to villages as reported by headman (n = 281 villages that received agricultural assistance)¹³



Income levels and poppy cultivation

In the 2008 village survey, MCN/UNODC collected information on the 2007 annual household income of 3,050 farmers, both poppy growing and non-growing. Results confirm the 2006 trend that in the southern region farmers have higher income than those living in other regions. The 2007 average annual income for poppy growing farmers increased in southern and western Afghanistan while it decreased in the rest of Afghanistan compared to 2006. The average annual income of poppy growing farmers in north-eastern and central Afghanistan was less than that of non-poppy growing farmers in 2007 due to the low level of poppy cultivation and the decrease in prices. In these two regions, farmers grew opium mainly for personal consumption.

Similar to 2007, the 2008 survey shows that the cultivation of opium is more widely spread in regions where farmers have the highest levels of income.

Table 8: 2007 annual household income by region¹⁴

Region	Average annual household income of poppy famers in 2007 (US\$) 1	Average annual household income of non-poppy famers in 2007 (US\$) 2	% household income difference between non-poppy farmers and poppy farmers as % of poppy farmers income (2-1)/1
Central	2357	2674	+13%
Eastern	1817	1753	-4%
North-eastern	1970	2290	+16%
Northern	2270	1862	-18%
Southern	6194	3382	-45%
Western	2895	2273	-21%
Over all	5055	2370	-53%

¹³ The percentages add to more than 100 because the village may have received more than one type of assistance.

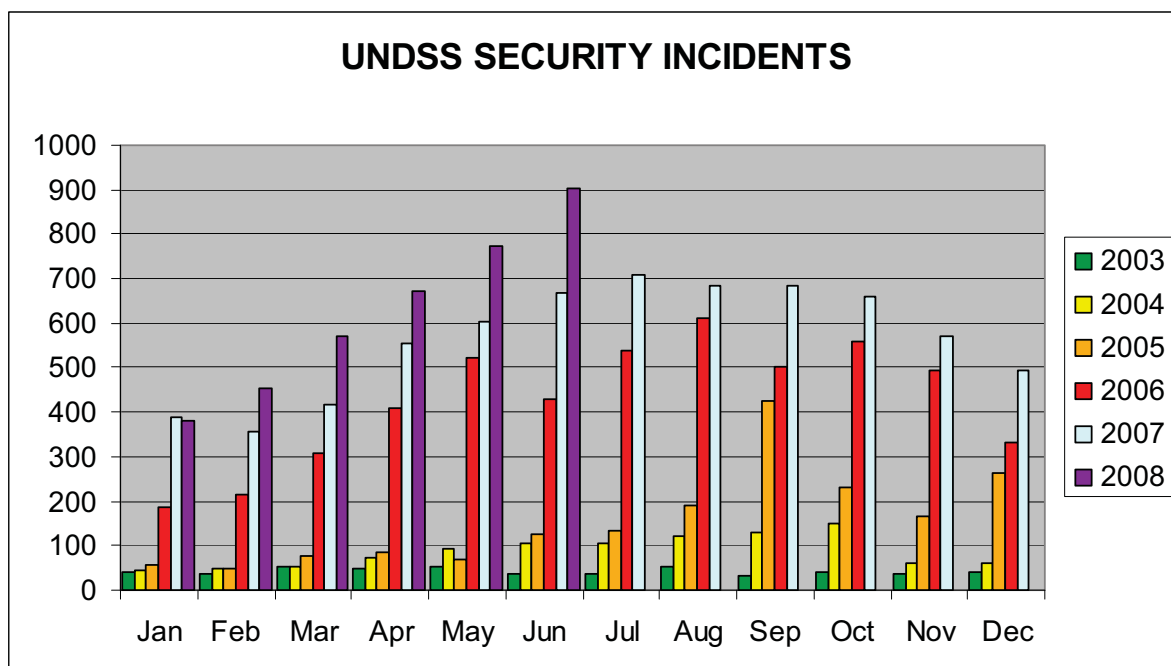
¹⁴ Caution should be used in comparing household income of growing and non growing households and across regions given the different size and distribution of farmers in the samples.

Security and opium cultivation show strong correlation

In 2008, 98% of the opium poppy cultivation was concentrated in Hilmand, Kandahar, Uruzgan, Day Kundi, Zabul, Farah and Nimroz, where security conditions are classified as high or extremely risky by the United Nations Department of Safety and Security (UNDSS). Most of the districts in this region are not accessible to the UN and NGOs. 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. The security map (source: UNDSS) shows the difference between southern and northern provinces in terms of security.

Security incidents in Afghanistan have been on the rise every year since 2003, especially in the south and south-western provinces. The number of security incidents increased sharply in 2006, in parallel with the increase of opium poppy cultivation. The year 2008 shows a further sharp increase in security incidents.

Figure 9: Number of security incidents by month, January 2003 to June 2008



Source: UNDSS, Kabul

Opium poppy eradication has become more risky

Eradication activities in 2008 were severely affected by resistance from insurgents. Since most of the poppy cultivation remains confined to the south and south-west region dominated by strong insurgency, eradication operations may in the future become even more challenging.

Security incidents associated with eradication activities in Hilmand, Kandahar, Hirat, Nimroz, Kapisa, Kabul and Nangarhar provinces included shooting and mine explosions resulting in

the death of at least 78 people, most of whom were policemen. This is an increase of about 75% if compared to the 19 deaths in 2007. The major incidents were in Nangarhar and Nimroz provinces.

One of the most serious incidents happened in Khogyani district of Nangarhar, where 20 policemen were killed together with Fazal Ahmad, a MCN/UNODC surveyor whose job was to collect the data that feed into this report. Other incidents happened in Khashrod district of Nimroz, where 29 people died along with the district police chief. Both attacks were carried out by suicide bombers. The Poppy Eradication Force (PEF) faced a large number of rocket attacks while carrying out eradication in Hilmand province.

The nature of the attacks changed between 2007 and 2008. In 2007, police deaths were the result of violence by farmers whereas deaths in 2008 were the result of insurgent actions, including suicide attacks.

5,480 ha of opium poppy eradication verified

A total of 5,480 ha of eradicated poppy fields were verified by MCN/UNODC. This included Governor-led eradication (GLE) (4,306 ha) and eradication led by the centrally controlled Poppy Eradication Force (PEF) (1,174 ha). It should be noted that the figure provided for GLE is a result of adjustments made to the initial figures reported by the field verifiers in the two provinces of Helmand and Kandahar following the discovery of significant over-reporting in these two provinces. These adjustments were made using satellite images which brought the figure of 6,326 ha initially reported by the field verifiers down to 3,842 ha. All verification from the centrally directed PEF was found accurate after a similar verification was done using satellite images.

Summary of eradication since 2005

The eradication and cultivation situation since 2005 is provided in the table below:

Table 9: Eradication and cultivation in Afghanistan (ha) 2005-2008

Year	2005	2006	2007	2008
GLE (ha)	4,000	13,050	15,898	4,306 ¹⁵
PEF (ha)	210	2,250	3,149	1,174
<i>Total (ha)</i>	<i>4,210</i>	<i>15,300</i>	<i>19,510</i>	<i>5,480</i>
Cultivation (ha)	104,000	165,000	193,000	157,000
% poppy in insecure provinces of South and West	56%	68%	80%	98%
Poppy free provinces	8	6	13	18

Some of the key factors that could explain the drop in eradication carried out in 2008 are:

- A reduction in the number of provinces eradicating because of the number of poppy-free provinces and provinces with negligible levels of cultivation increased in 2008. In 2007, 26 provincial governors conducted eradication; in 2008 only 17 provinces conducted eradication.
- Overall crop failure due to an extremely cold winter reduced the poppy crop in a number of provinces.

¹⁵ The final figure adjusted using high resolution satellite images.

- Increased voluntary and/or forced self-eradication by poppy farmers. An active public information campaign and vigorous enforcement action by some provincial governors led to a substantial amount of self-eradication carried out by farmers either voluntarily or through coercion. These figures cannot be counted in the official figures (because they are not verifiable) but the claims are in the order of 3,000- 4,000 ha..
- Unlike previous years, most of the cultivation is concentrated in a limited number of lawless provinces in the south (Hilmand, Kandahar, Uruzgan, Zabul and Daykundi) and west (Farah and Nimroz). Eradication in these provinces is more challenging due to security problems.

Table 10: Governor-led eradication by province (ha), 2008

Province	Eradication (ha) verified	No. of fields eradication reported	No. of villages eradication reported	Total standing poppy after eradication in the reported villages (ha)	Per centage of opium poppy eradication in surveyed villages
Badakhshan	774	1374	145	125	86%
Baghlan	85	125	16	0	100%
Farah	9	15	9	670	1%
Ghor	38	170	38	11	78%
Hilmand	1416	2221	140	1449	49%
Hirat	352	606	55	140	72%
Jawzjan	0.05	1	1	0	100%
Kabul	20	95	6	118	14%
Kandahar	1222	2141	228	3199	28%
Kapisa	6	21	3	0	100%
Kunar	103	1124	58	18	85%
Laghman	26	106	7	0	100%
Nangarhar	26	227	18	7	79%
Nimroz	113	199	16	377	23%
Nuristan	3	28	1	0	87%
Uruzgan	113	221	21	636	15%
Zabul	0.14	2	1	0	100%
Grand Total	4,306	8,676	763	6,749	39%

Although the highest eradication was reported in Hilmand (1,416 ha), this amount becomes almost negligible considering the amount of poppy cultivation in this province (103,590 ha). Eradication in Kandahar (1,222 ha) was proportionally higher considering the total cultivation of 14,623 ha. Government officials in Kandahar also forced farmers to eradicate their poppy in the early stages of cultivation. Considering the low level of cultivation in 2008, eradication efforts in Badakhshan (714 ha), Hirat (322 ha) and Kunar (103 ha) provinces can be considered successful. In contrast only 9 ha of poppy fields were eradicated in Farah province despite of the high amount of poppy cultivation in 2008.

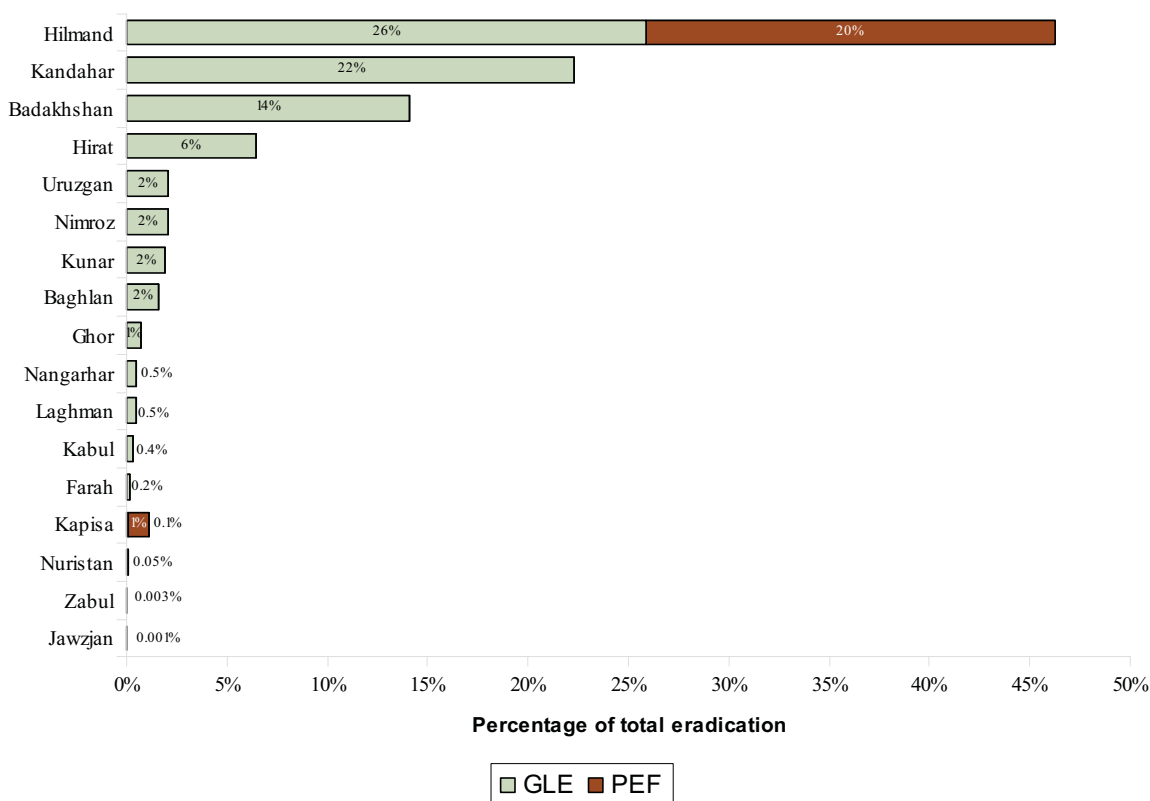
Eradication area within/outside target zones

GLE eradication target zones were defined by MCN for the five highest opium poppy cultivating provinces (Farah, Hilmand, Kandahar, Nimroz and Uruzgan). Target zones are shown in the maps provided at the end of this report. Table 2 shows the total area eradicated within and outside the eradication target zones in each province.

Table 11: Area within/outside target zones (ha) 2008

Province	Area within eradication target zone (ha)	Area outside eradication target zone (ha)	Total eradication verified (ha)
Farah	5	4	9
Hilmand	780	636	1,416
Kandahar	97	1,125	1,222
Nimroz	106	7	113
Uruzgan	54	60	113
Grand Total	1,042	1,832	2,873

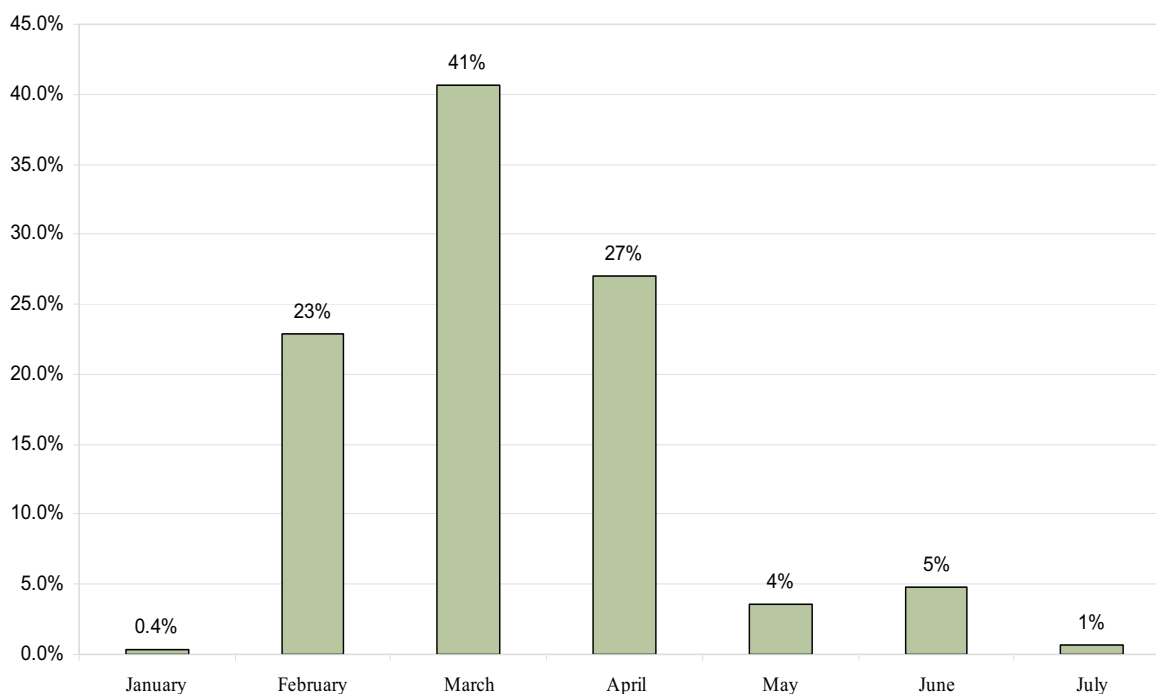
Figure 10: Percentage of total eradication (GLE and PEF) by province 2008



Timing and percentage of eradication by month

Figure 14 shows timing and proportions of total governor-led eradication each month. Ninety one per cent of eradication was carried out in three months from February 2008 to April 2008. The amount of eradication was negligible between October (planting time) and January.

Figure 11: Total area eradicated each month, shown as percentage



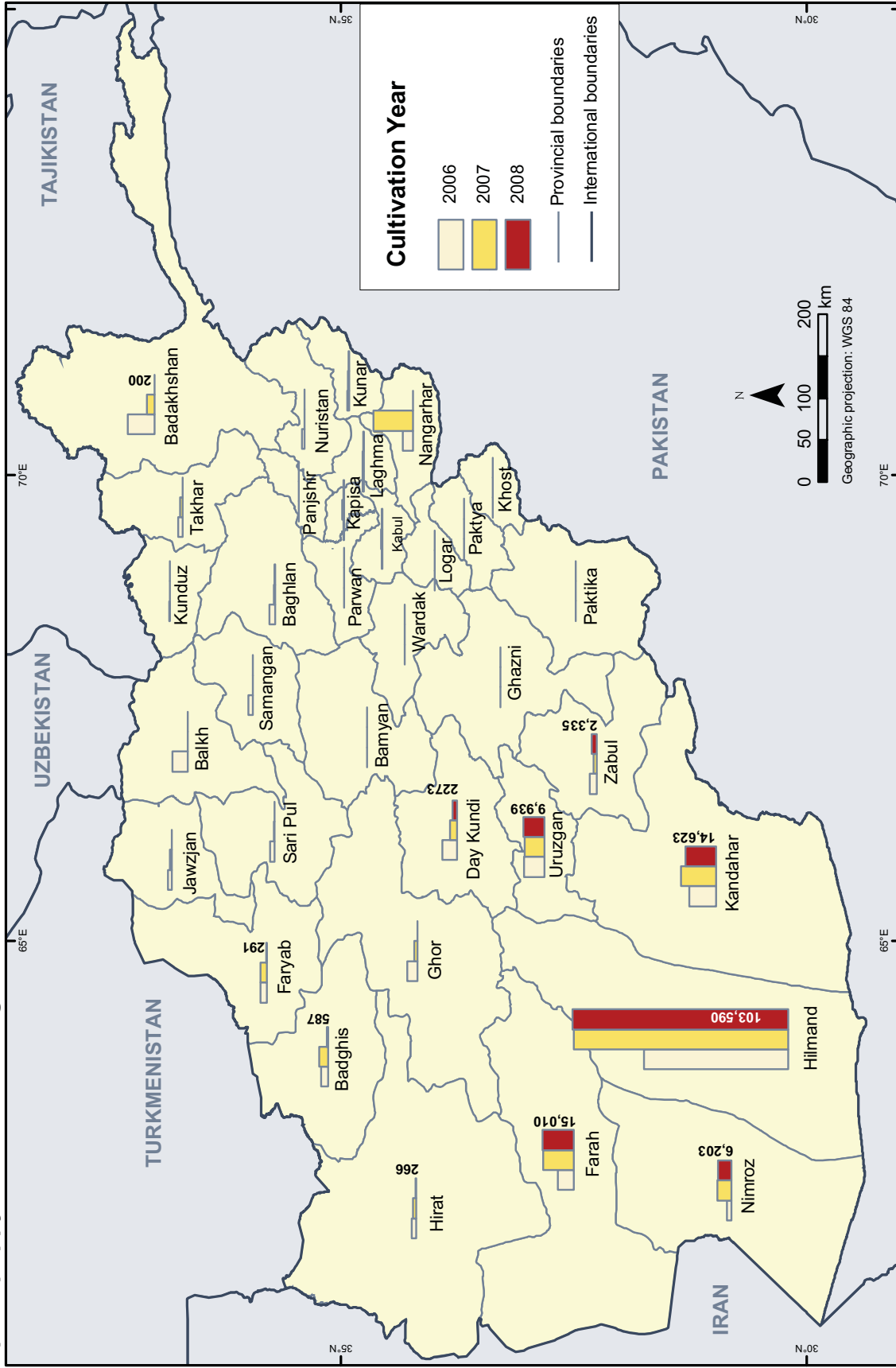
Cannabis cultivation is becoming as lucrative as opium poppy

In 2008, cannabis cultivation was reported in 14 provinces namely Badakhshan, Badghis, Baghlan, Bamyan, Day Kundi, Farah, Hilmand, Kandahar, Khost, Kunduz, Laghman, Nangarhar, Uruzgan and Zabul. The highest cultivation was reported in Uruzgan, followed by Kandahar, Hilmand and Nangarhar. The average price of cannabis at the end of July was USD\$ 56/kg.

Cannabis prices have been increasing in the last two years and reached US\$ 56/kg in July 2008. Farmers growing cannabis may earn the same net income per hectare as farmers who grow opium, or even more, because cultivating cannabis is less labour intensive than opium.

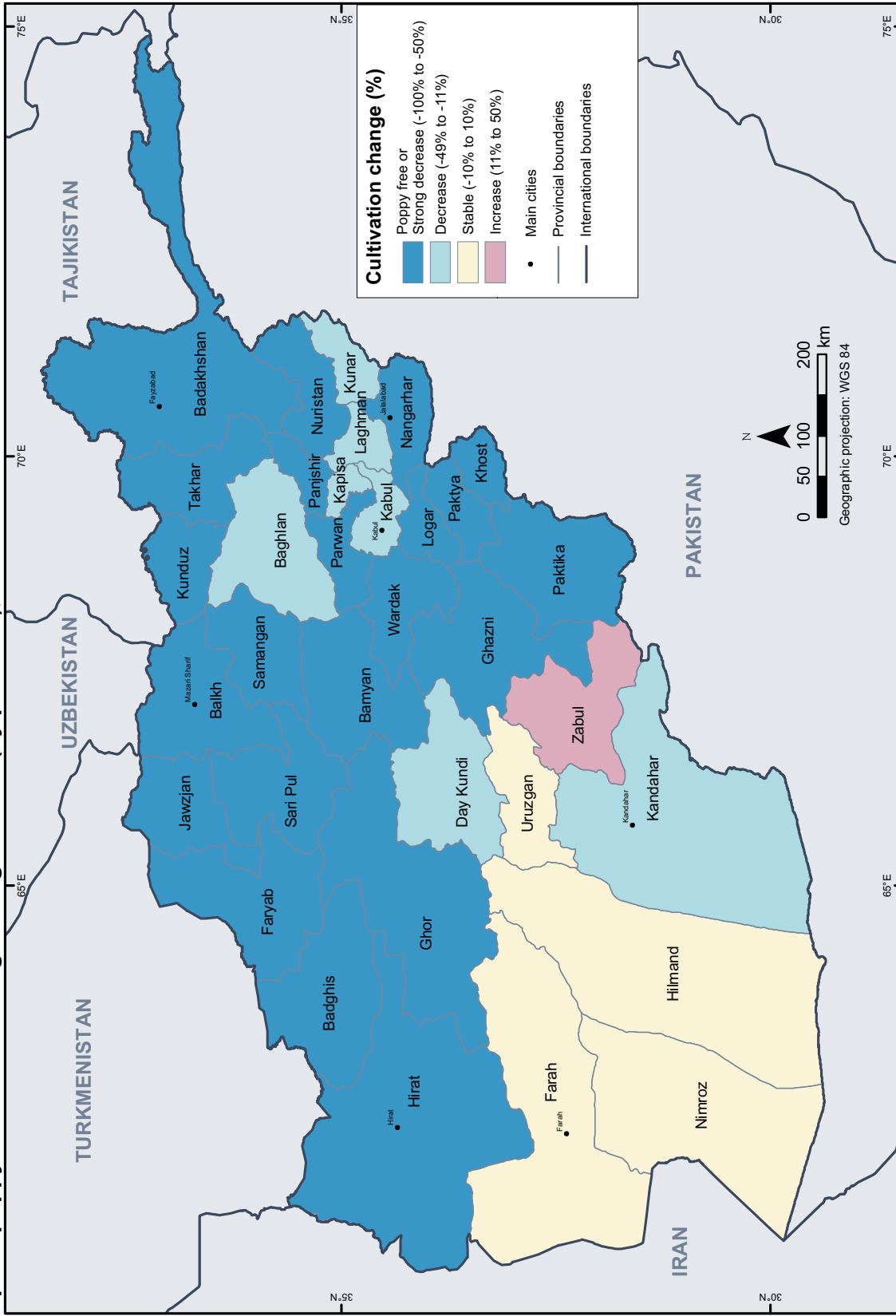
Though the opium survey does gather some data on cannabis cultivation, no estimates can be provided in this preliminary report. It is clear, however, that cultivating cannabis is becoming increasingly lucrative. When this is considered in conjunction with the fact that all the emphasis is put on reducing opium, there is a great risk of farmers switching to cannabis.

Opium poppy cultivation in Afghanistan, 2006-2008



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.

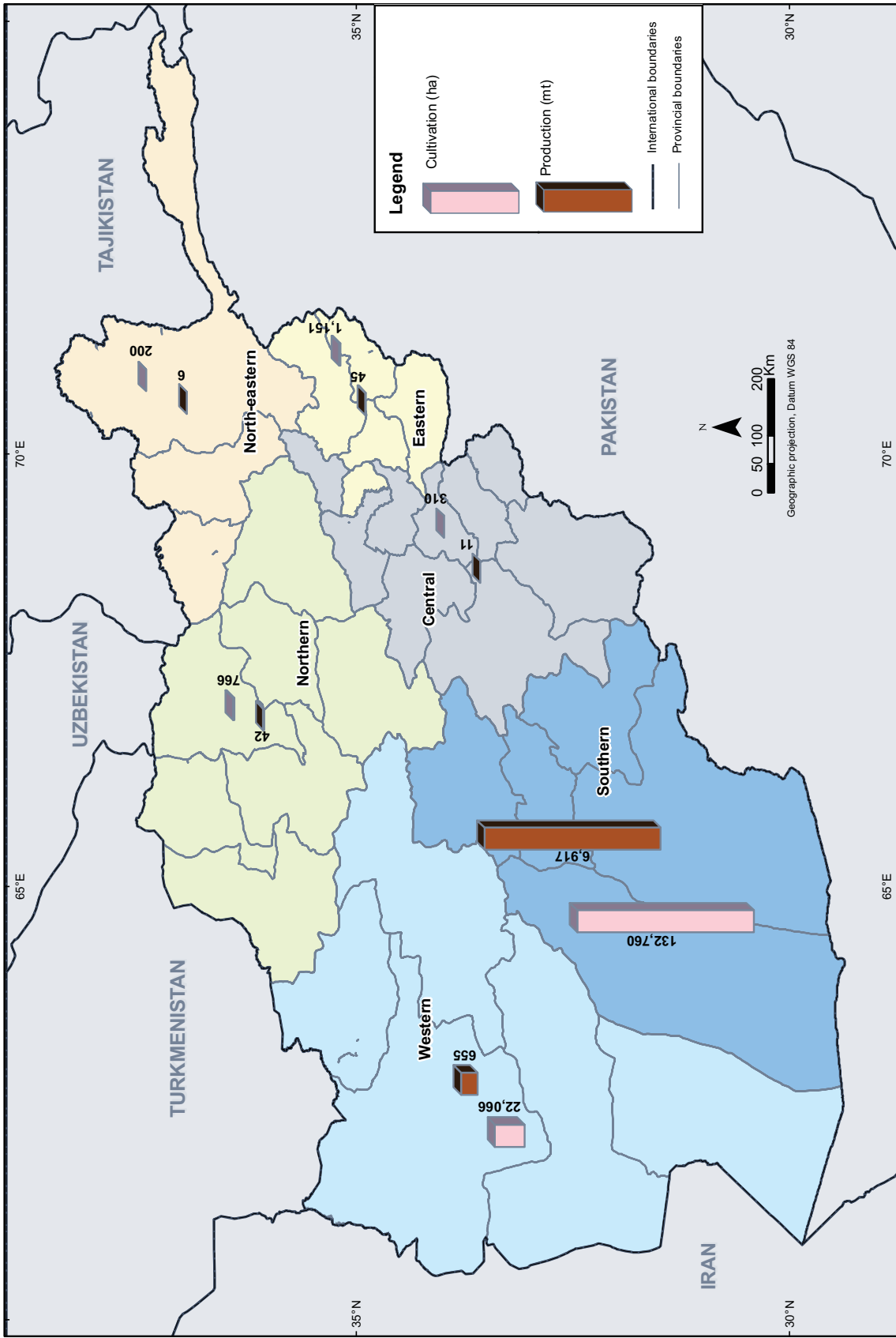
Opium poppy cultivation change in Afghanistan (by province), 2007 - 2008



Source: Government of Afghanistan - National monitoring system implemented by UNODC

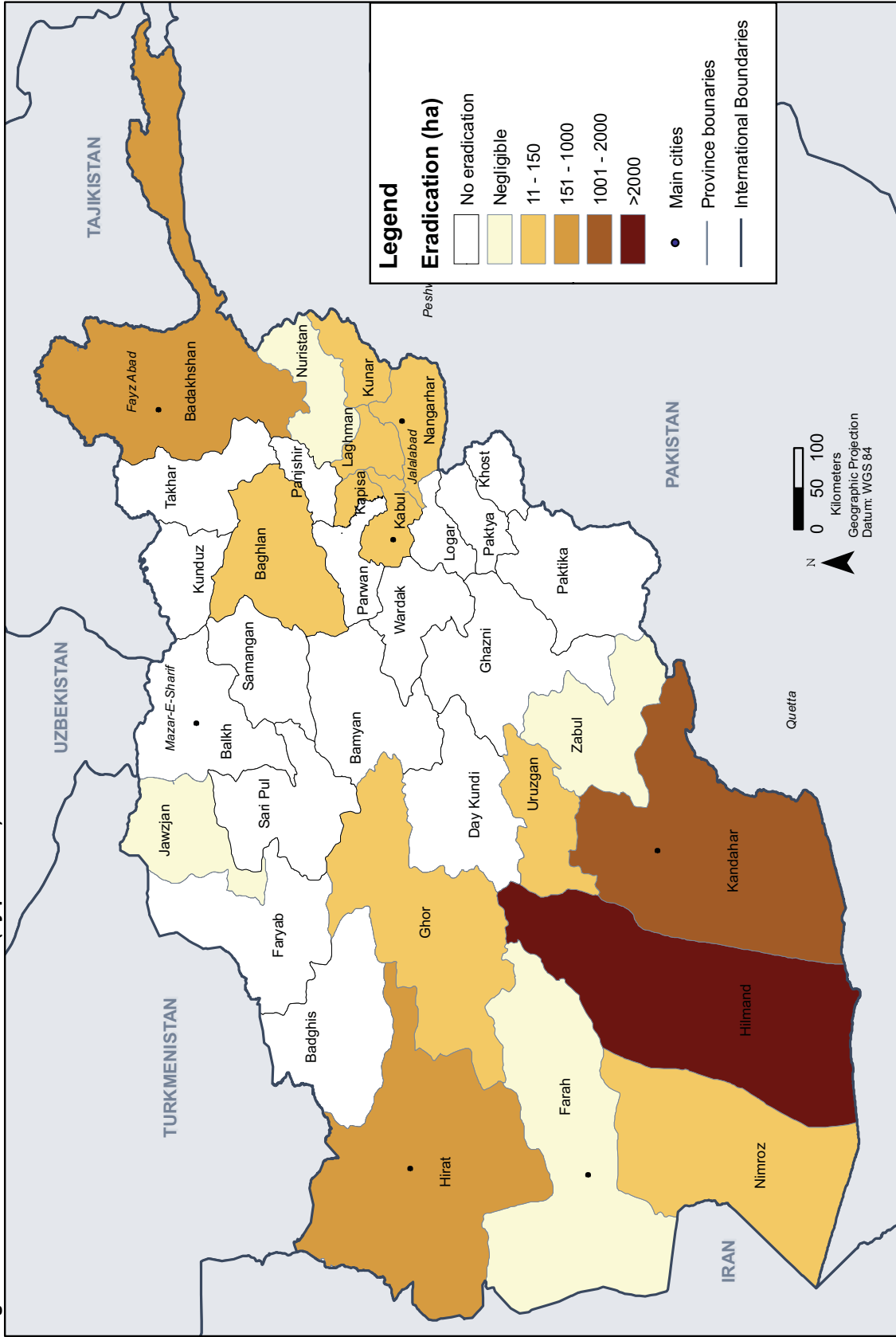
Note: The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations.

Regional opium poppy cultivation and production in Afghanistan, 2008



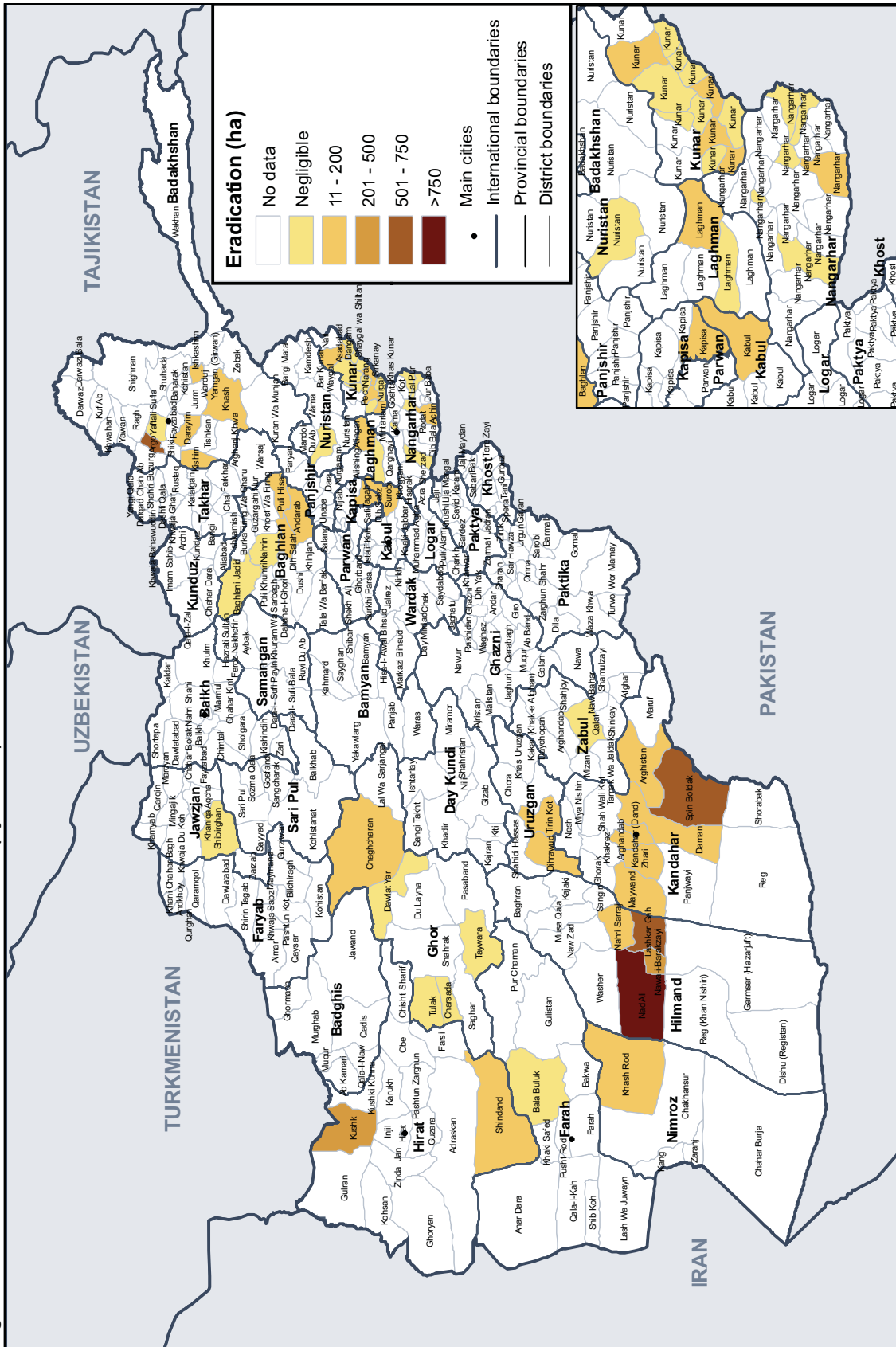
Source: Government of Afghanistan - National monitoring system implemented by UNODC
 Note: The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations.

Afghanistan: Verified GLE and PEF in 2008 (by province)



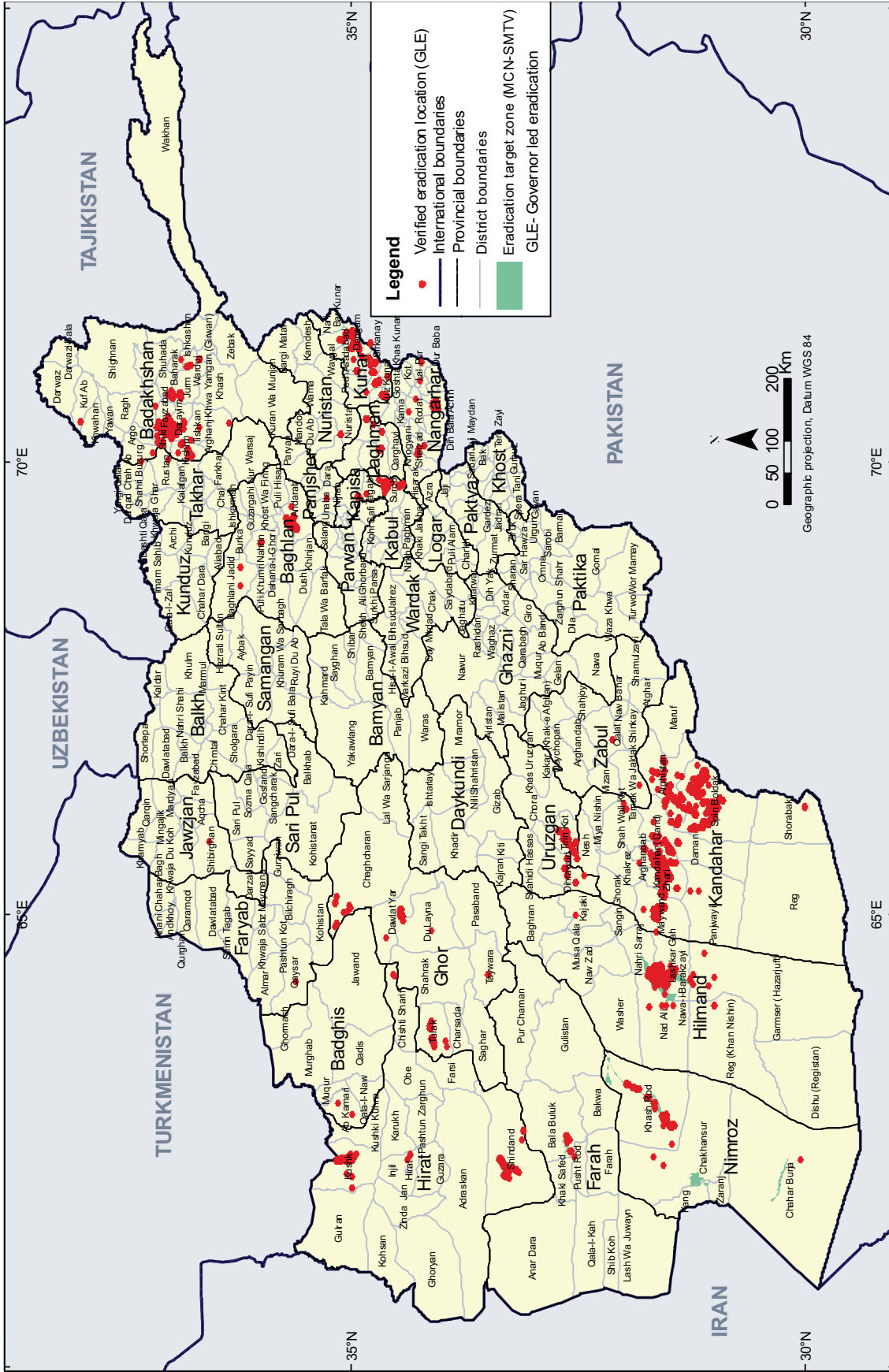
Source: Government of Afghanistan - National monitoring system implemented by UNODC
 Note: The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations.

Afghanistan: Verified GLE and PEF Eradication in 2008 (by district)



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.

Afghanistan: Verified locations of Governor-led eradication, 2008



Source: MCN - UNODC Afghanistan Eradication Survey 2008
 Note: The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations.