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Government of Afghanistan
Ministry of Counter Narcotics

Afghanistan Opium Survey 2010

Winter Rapid Assessment



February 2010

ABBREVIATIONS

AGE	Anti Government Elements
GPS	Global Positioning System
ICMP	Illicit Crop Monitoring Programme (UNODC)
ORA	Opium Winter Rapid Assessment Survey
MCN	Ministry of Counter-Narcotics
UNODC	United Nations Office on Drugs and Crime

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A year of consolidation

Executive Summary

After a major drop in opium cultivation (one third) over the past two years, UNODC projects a stable crop in Afghanistan in 2010.

The majority of the 20 Afghan provinces that were poppy-free in 2009 will remain so this year. Yet, three provinces (Baghlan, Faryab and Sari Pul, all in the north) risk showing the beginning of a trend reversal, with a minimal increase in cultivation in the districts with higher insecurity. Five other provinces (Kunar, Nangarhar, Kabul, Laghman and Badakhshan), not poppy-free so far, are also expected to have negligible amounts of poppies.

All considered, with appropriate local community-inspired measures – such as shura-driven campaigns, governor-led eradication, and development assistance – up to 25 Afghan provinces could become poppy-free in 2010. Further progress in the reduction of drug cultivation (hectares) in Afghanistan is within reach.

Against the recent trend of ever higher productivity in the country-side, agricultural conditions in Afghanistan are expected to deteriorate in 2010, because of bad weather. Lower opium yields should also reduce the volume (tons) of opium produced, continuing the decline that has characterized the past three years.

Why is all this happening? Since 2007 market forces have played a major role in influencing farmers' decisions against opium cultivation. This is under threat as the price of licit crops (especially wheat at -43%) is falling faster than that of (dry) opium (-6%). Yet the reversal is not imminent: in the south-west, where most of the opium is grown, a quarter of farmers cited low prices and low yields as the main reasons for not growing opium this year.

Relative price trends are only part of the story. Good governance and control of the territory are vital factors to uphold the law. In the more stable (north-western) provinces most farmers (61%) refrained from growing opium in 2010 "*because it is illegal*". This figure is significantly lower (39%) in the south-west where "*governance is poorer and insecurity higher*". Actually, the strongest correlation is between insurgency and cultivation. The survey indicates that almost 80% of villages with very poor security conditions grew poppy, while opium only grows in 7% of villages unaffected by violence.

As stated by President Karzai at the London Conference, the Afghan authorities must show leadership and ownership to wean Afghanistan's farmers off the world's deadliest drug. While it is essential to tackle the problem where it is most acute (in the south), particular attention should be given to the eight swing provinces that are on the verge of becoming poppy -free. This would turn the recent improvement (2008-09) into a sustainable longer term trend.

1. GENERAL FINDINGS

Following the 22 % reduction in opium cultivation in 2009 (123,000 ha), the Opium Winter Rapid Assessment (ORAS) anticipates an overall stable opium cultivation in Afghanistan in 2010.¹

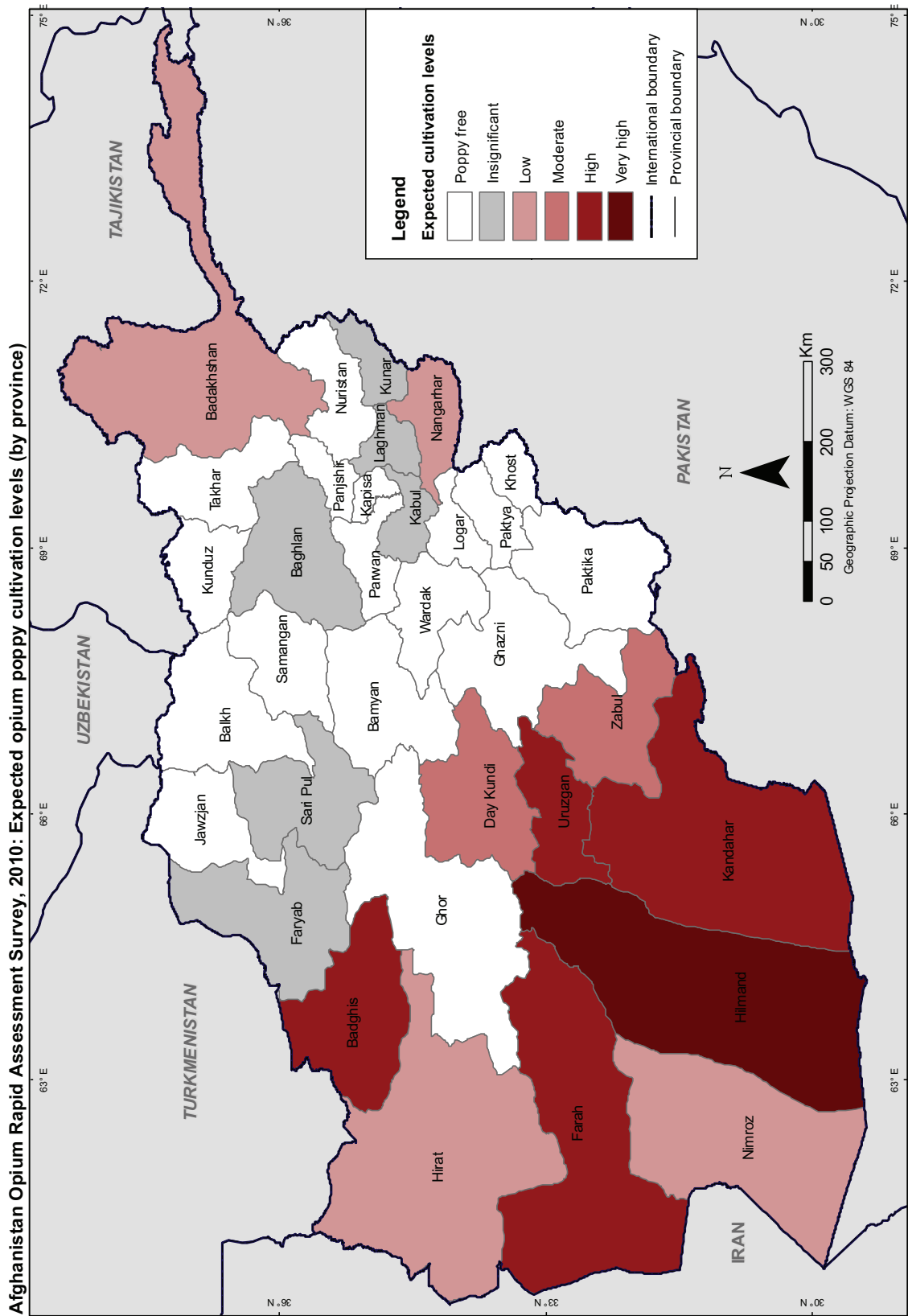
- Four provinces, Uruzgan, Faryab, Baghlan and Sari Pul are likely to show a moderate increase in opium cultivation.
- The twenty provinces reported to be poppy-free in 2009 are likely to be reduced to only 17 in 2010. The assessment indicates that three provinces, Baghlan, Faryab and Sari Pul, which were poppy-free in 2009, will not be poppy-free in 2010 unless timely eradication is implemented or if the current drought-like conditions persist.
- A moderate decrease in opium cultivation is expected in Kunar, Nangarhar, Badghis, Farah, Hirat, Nimroz, Day Kundi and Zabul provinces. Kunar and Nangarhar can be poppy-free if timely eradication is implemented.
- The opium cultivation is expected to remain stable in Kabul, Laghman, Badakhshan, Hilmand and Kandahar provinces. Kabul, Laghman and Badakhshan can be poppy-free if timely eradication is implemented. However, cultivation would remain very high in Hilmand and high in Kandahar.
- Overall, the cultivation of opium in Afghanistan is likely to remain stable in 2010 but the number of poppy-free provinces may decrease. However, if timely poppy eradication measures are implemented and/or drought-like conditions prevail, a total of 25 provinces, an increase of 5 compared to 2009, could be poppy-free in 2010.

Table 1 Opium cultivation trends at a glance

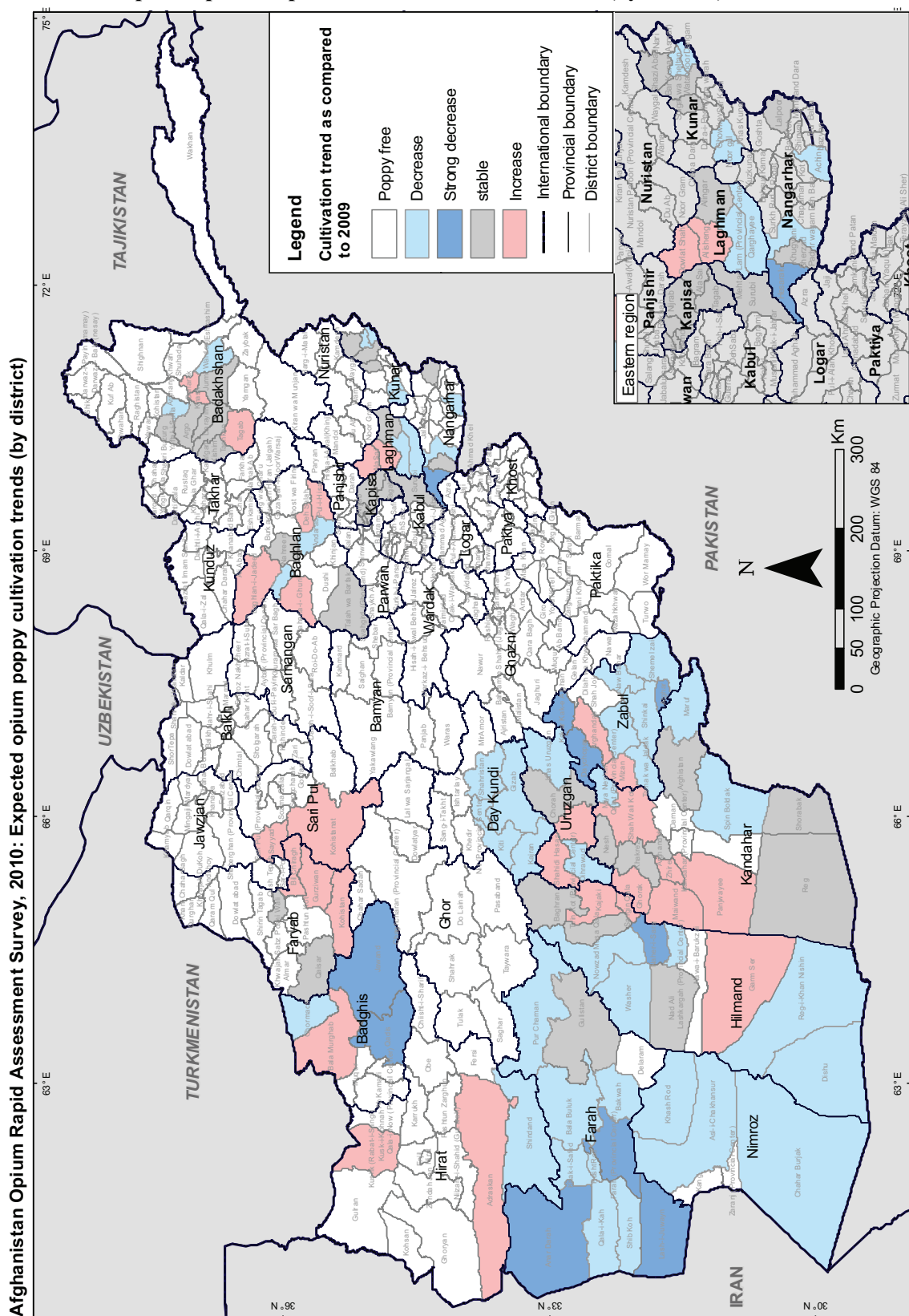
Cultivation trend in 2010	No. of provinces	Provinces	Comments
Poppy free	17	Balkh, Bamyan, Ghazni, Ghor, Jawzjan, Kapisa, Khost, Kunduz, Logar, Nuristan, Paktika, Paktya, Panjshir, Parwan, Takhar, Wardak and Samangan	These provinces were poppy-free also in 2009.
Moderate decrease	8	Kunar, Nangarhar, Badghis, Farah, Hirat, Nimroz, Day Kundi and Zabul	Kunar and Nangarhar provinces can become poppy free if timely elimination activities are implemented.
Stable	5	Kabul, Laghman, Badakhshan, Hilmand and Kandahar	Kabul, Laghman and Badakhshan provinces can become poppy free if timely elimination activities are implemented
Moderate increase	4	Baghlan, Faryab, Sari Pul and Uruzgan	Baghlan, Faryab and Sari Pul provinces can become poppy free if the current drought like conditions continue and timely elimination activities are implemented

¹ The 2010 Opium Winter Assessment report is based on a relatively small sample of villages and the results are indicative, only.

Map 2 Expected opium cultivation level in 2010 (by province)



Map 3 Expected opium cultivation trends in 2010 (by district)



Source: MCN - UNODC Afghanistan Opium Rapid Assessment Survey, 2010 (http://www.unodc.org/unodc/en/crop_monitoring.html)
 Note: The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations.

Map 4 Regional grouping of provinces for opium surveys in Afghanistan

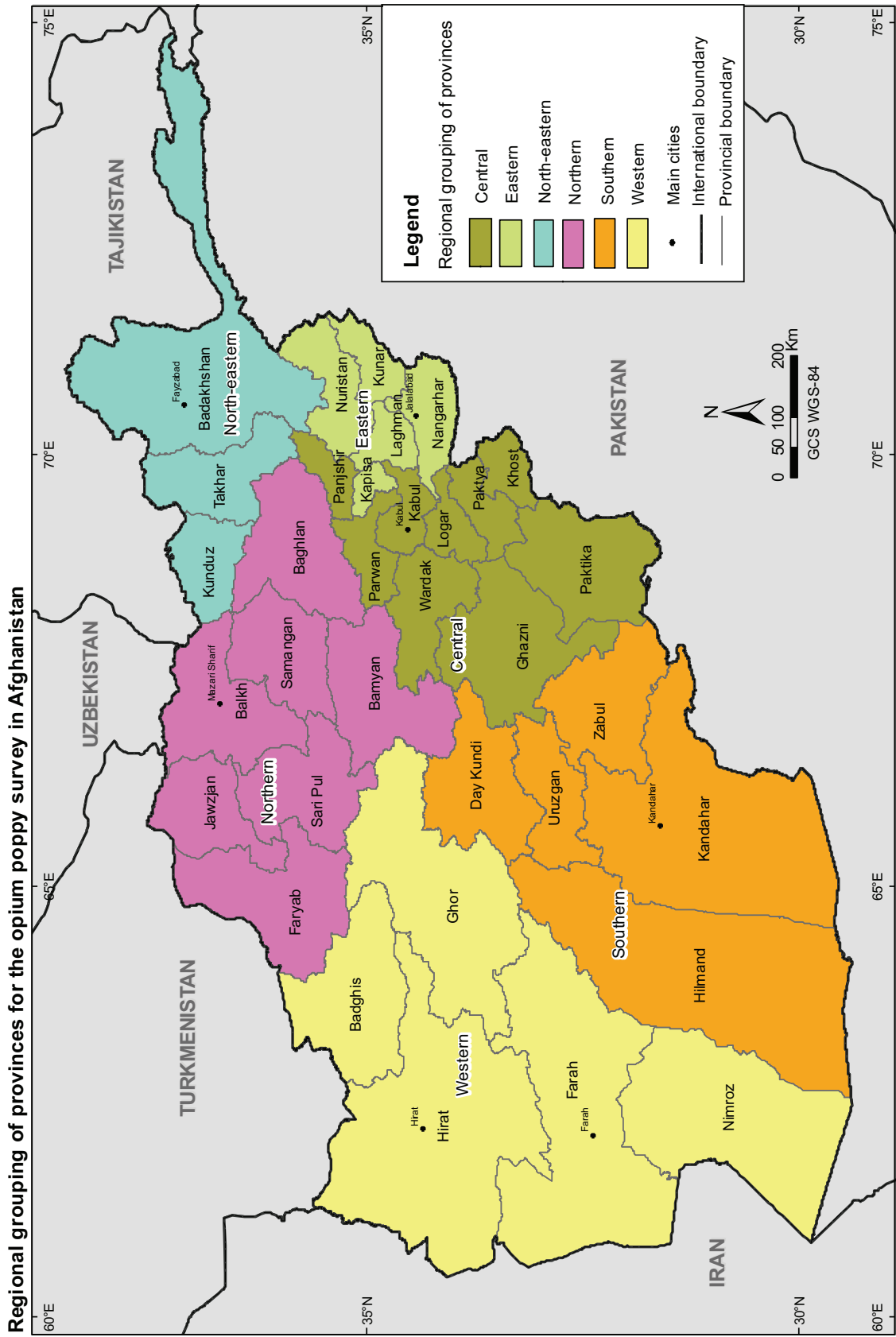


Table 2 Expected opium cultivation trends in 2010 (by province)

Region	Province	Cultivation 2009 (ha)	2010 Expected opium cultivation change	Expected opium cultivation levels
Central	Ghazni	Poppy-free	Poppy-free	Poppy-free
	Kabul	132	Stable	Insignificant
	Khost	Poppy-free	Poppy-free	Poppy-free
	Logar	Poppy-free	Poppy-free	Poppy-free
	Paktika	Poppy-free	Poppy-free	Poppy-free
	Paktya	Poppy-free	Poppy-free	Poppy-free
	Panjshir	Poppy-free	Poppy-free	Poppy-free
	Parwan	Poppy-free	Poppy-free	Poppy-free
	Wardak	Poppy-free	Poppy-free	Poppy-free
Eastern	Kapisa	Poppy-free	Poppy-free	Poppy-free
	Kunar	164	Moderate decrease	Insignificant
	Laghman	135	Stable	Insignificant
	Nangarhar	294	Moderate decrease	Low
	Nuristan	Poppy-free	Poppy-free	Poppy-free
Northern	Baghlan	Poppy-free	Moderate increase	Insignificant
	Balkh	Poppy-free	Poppy-free	Poppy-free
	Bamyan	Poppy-free	Poppy-free	Poppy-free
	Faryab	Poppy-free	Moderate increase	Insignificant
	Jawzjan	Poppy-free	Poppy-free	Poppy-free
	Samangan	Poppy-free	Poppy-free	Poppy-free
	Sari Pul	Poppy-free	Moderate increase	Insignificant
North-eastern	Badakhshan	557	Stable	Low
	Kunduz	Poppy-free	Poppy-free	Poppy-free
	Takhar	Poppy-free	Poppy-free	Poppy-free
Southern	Day Kundi	3,002	Moderate decrease	Moderate
	Hilmand	69,833	Stable	Very high
	Kandahar	19,811	Stable	High
	Uruzgan	9,224	Moderate increase	High
	Zabul	1,144	Moderate decrease	Moderate
Western	Badghis	5,411	Moderate decrease	High
	Farah	12,405	Moderate decrease	High
	Ghor	Poppy-free	Poppy-free	Poppy-free
	Hirat	556	Moderate decrease	Low
	Nimroz	428	Moderate decrease	Low
Total (Rounded)		123,000	Overall Stable	

Trends by region

The 2010 ORAS highlights the following key cultivation trends as compared to 2009:

- **Central region:** the entire Central region can become poppy-free if opium cultivation in Surobi district of Kabul province is substantively reduced. Cultivation is stable in Kabul compared to 2009.
- **Eastern region:** Opium cultivation in Eastern region may be moderately reduced. The cultivation level in Kunar and Nangarhar provinces is lower compared to 2009 results, and restricted to mountainous regions. Opium cultivation in Laghman province is reported to be stable. Kapisa and Nuristan would remain poppy-free.
- **Northern region:** The region became poppy-free in 2009. However, Baghlan, Faryab and Sari Pul show an increase in some of the districts and would not be poppy-free this year. Balkh, Bamyán, Jawzjan and Samangan would remain poppy-free again this year.
- **North-eastern region:** Opium cultivation in Badakhshan would remain stable. This is the only province in North-eastern region where opium has traditionally been cultivated. Takhar and Kunduz are the other two provinces in this region and would remain poppy-free.
- **Southern region:** The main opium cultivating provinces in this region Hilmand and Kandahar would remain stable compared to last year. The rapid assessment of this region shows that it would still remain the largest opium producing region. Hilmand province is expected to retain its status of the largest opium cultivating province.
- **Western region:** There is a likely moderate decrease in opium cultivation in all the provinces in this region. Badghis and Farah would remain a high cultivating province while Hirat and Nimroz would have low cultivation. Ghor province is expected to remain poppy-free.

The three provinces in Northern region, Baghlan, Faryab and Sari Pul which were poppy-free last year would not be poppy-free this year because of an increase in opium cultivation in some of the districts which may be related to insecurity. Baghlan-I-Jadeed, Dahana-I-Ghuri, Deh Salah and Pul-I-Hisar are the four districts of Baghlan province where there has been increase in opium cultivation. In Faryab province the districts of Bil Chiragh, Gurziwan and Kohistan are expected to cultivate more poppy. In Kohistanat and Sayyad districts of Sari Pul province an increase of cultivation is also reported.

In the winter this year, there has been very little snow in the region and if this condition prevails there would be a lack of water for irrigation. Under such circumstances these provinces could remain poppy-free. The drought like conditions would adversely effect both irrigated and rain-fed opium cultivation.

Although there is a moderate decrease in the trends in opium cultivation in most of the provinces in Western region, as well as Zabul and Day Kundi provinces in the Southern region, the overall cultivation would remain stable in the country because of stable cultivation trends in the provinces with highest cultivation Hilmand and Kandahar. Badghis and Farah also remain provinces with high levels of cultivation, even after a moderate decrease in the cultivation trends this year (2010). This decrease in trends would be balanced by the increase in cultivation in Uruzgan, Baghlan, Faryab and Sari Pul.

The quality and quantity of opium crop in high altitude rain-fed areas of northern Afghanistan will depend on the amount of rainfall during the upcoming spring season.

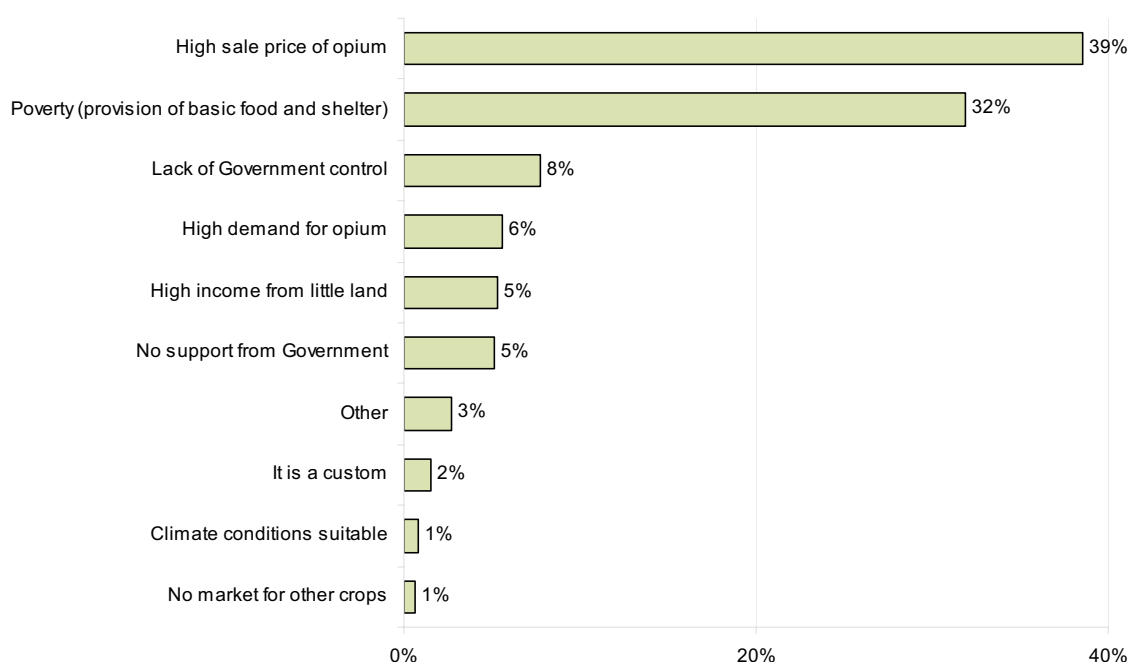
1.1. DRIVING FORCES BEHIND OPIUM CULTIVATION TRENDS IN 2010

During the 2010 ORAS, village headmen from poppy growing and non-poppy growing villages were asked to state the main reason why the farmers chose to cultivate opium instead of other crops or not cultivate it at all.

Reasons for opium cultivation in 2010

“Higher sales price of poppy as compared to other crops” was the predominant reason (39%) for growing opium. Although the opium price continues to decrease, its level is still higher than other crops and for some farmers, opium continues to be a more lucrative investment than other crops. About 32% of respondents also cited ‘poverty’ as the most dominant reason. Interestingly, in 8% of the responses, the reason for growing opium poppy was the “lack of governmental control”.

Figure 1 Reasons for opium cultivation in 2010 in opium growing villages

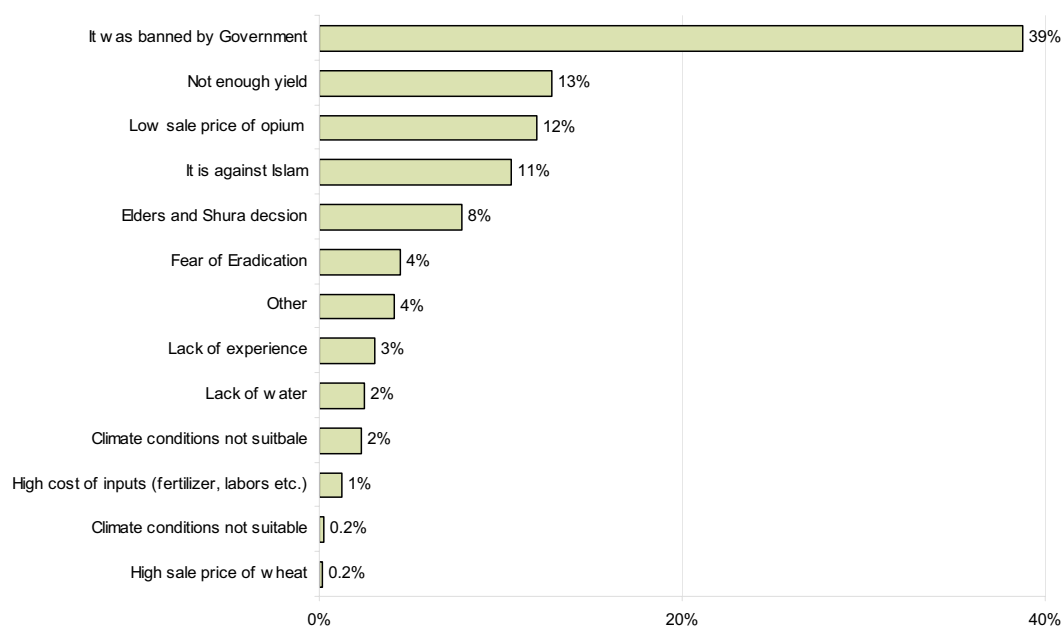


Reasons for not cultivating opium in 2010

Reasons reported by headmen for not cultivating opium differed between the southern and western region and the rest of the country.

The predominant reasons given by 39% of respondents for not growing poppy in the Southern and Western regions are ‘banned by the Government’, 13% responded with the reason ‘not enough yield’ and 12% mentioned the ‘low sale price of opium’. ‘Cultivating opium is against Islam’, ‘elders and shura’s decision’ and ‘fear of eradication’ were also mentioned, but by fewer headmen.

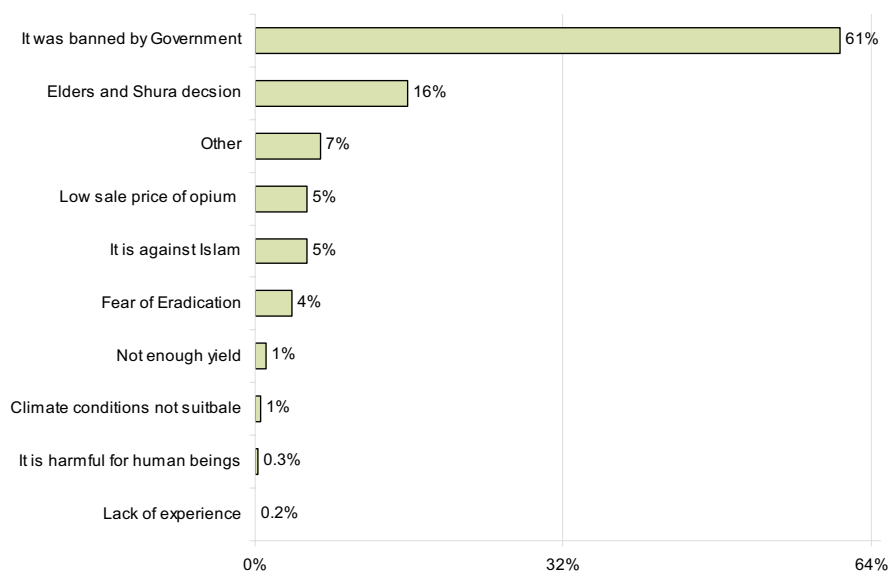
Figure 2 Reasons for not cultivating opium in 2010 (Southern and Western regions)



Note: 99% of the total opium of Afghanistan was cultivated in these regions in 2009.

In the rest of the country, 61% of the respondents quoted as most dominant reason for not growing poppy ‘banned by the Government’ compared to only 39 % in the Southern and Western regions. Their second most dominant reason, by 16 % of the respondents was ‘elders and shura’s decision’. ‘low sale price of opium’, ‘cultivating opium is against Islam’ and ‘fear of eradication’ was also cited by a number of respondents.

Figure 3 Reasons for not cultivating opium in 2010 (regions other than Southern and Western)



Note: Only 1% of the total opium of Afghanistan was cultivated in these regions in 2009.

1.2. NUMBER OF VILLAGES GROWING OPIUM

Of the 536 villages visited, 188 (35 %) reported that they expect to grow opium poppy in 2010. The percentage of poppy-growing villages among those visited varies from region to region. In the Southern and Central region, 60-62 % of the surveyed villages reported planned opium cultivation in 2010. During ORAS 2009, 71% of the villages in Southern region reported opium cultivation.

Table 3 Proportion of opium-growing villages

Region	% of villages surveyed (ORAS 2010)		% of villages surveyed (ORAS 2009)	
	No opium cultivation in 2010	Opium cultivation in 2010	No opium cultivation in 2009	Opium cultivation in 2009
Central	40%	60%	99%	1%
Eastern	80%	20%	91%	9%
North-Eastern	91%	9%	97%	3%
Northern	97%	3%	96%	4%
Southern	38%	62%	29%	71%
Western	61%	39%	65%	35%
Total	65%	35%	73%	27%

Note: The ORAS 2010 did not cover the same survey area as the ORAS 2009. Thus, results are not directly comparable.

1.3. CASH ADVANCES RECEIVED FOR OPIUM CULTIVATION

The ORAS 2010 indicates that 14% (down from 18% in ORAS 2009) of the surveyed opium poppy-growing villages received cash advances from external sources to grow opium poppy. Respondents in Badakhshan (14%), Hilmand (11%), Kandahar (27%), Uruzgan (54%) and Zabul (57%) reported that they had received such advances.

1.4. AGRICULTURAL ASSISTANCE

Of the 536 villages visited, 231 (43%) have received agricultural assistance in the form of seed, fertilizers and irrigation facilities, and 57% reported not to have received such assistance.

By comparison, almost two thirds of the villages, which are expected to have opium cultivation in 2010, had not received agricultural assistance in 2009. This indicates that the provision of agricultural assistance could have a positive effect on the decision to grow or not to grow opium. On the other hand, about 13% of all villages surveyed had received agricultural assistance and still continue to grow opium pointing to the existence of other factors.

Table 4 Agricultural assistance vis-à-vis expected opium cultivation

Agricultural assistance received in 2009	Opium cultivation expected in 2010		Total
	No	Yes	
No	35%	22%	57%
Yes	30%	13%	43%
Total	65%	35%	100%

1.5. FIELD SECURITY DURING ORAS IMPLEMENTATION

The survey indicates that approximately 79% of villages with 'very poor' security and 66% of those with 'poor' security are involved in opium cultivation, as compared to only 20% and 7% of villages with 'good' and 'very good' security.

Security was of general concern in most areas in the Southern region (Hilmand, Uruzgan and Kandahar). In the Western region, Nimroz and Farah provinces had poor security conditions.

Table 5 Security situation vis-à-vis expected opium cultivation

Security situation	No. of villages surveyed		% of villages cultivating opium poppy
	No opium cultivation in 2010	Opium cultivation in 2010	
Very poor	13	50	79%
Poor	42	82	66%
Good	201	49	20%
Very good	92	7	7%

1.6. ERADICATION AND AWARENESS

Of the 536 villages surveyed during the ORAS, 188 (35%) have planted opium poppy for the 2010 cultivation season. Of these 188, only 36 villages had experienced opium eradication in 2009. A large majority of those (32 villages) still decided to plant opium despite having experienced eradication in 2009. Whether or not a village has experienced eradication did not seem to have a significant influence on its decision to continue or stop opium cultivation.

Table 6 Eradication in 2009 vis-à-vis expected opium cultivation in 2010

Eradication in 2009	% of villages surveyed		Total
	No opium cultivation in 2010	Opium cultivation in 2010	
No	64%	29%	93%
Yes	1%	6%	7%
Total	65%	35%	100%

An awareness campaign to prevent opium cultivation was conducted in many areas of Afghanistan in October and November 2009. Just over half of the surveyed villages (54%) were reached by awareness campaigns.

About half of the villages, which expected to grow opium in 2010, had been reached by an awareness campaign against opium cultivation, and the other half hadn't. Whether or not a village had been reached by an awareness campaign seems to have only limited influence on the decision to grow or not to grow opium.

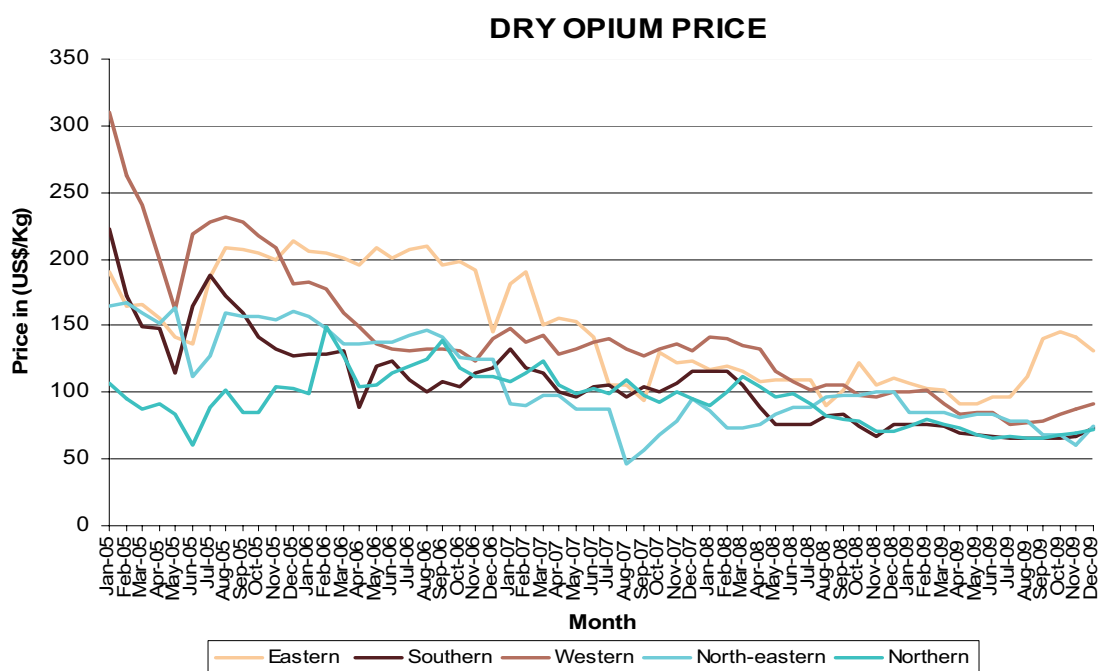
Table 7 Awareness campaign in 2009 vis-à-vis expected opium cultivation in 2010

Awareness campaign	% of villages surveyed		Total
	No opium cultivation in 2010	Opium cultivation in 2010	
No	29%	17%	46%
Yes	36%	18%	54%
Total	65%	35%	100%

1.7. PRICES

UNODC collects monthly opium prices from 15 key provinces. In addition to this, the ORAS 2010 collected price information in 536 surveyed villages. The average farm-gate prices of dry opium at the time of the survey were in line with the monthly price report in December 2009. The detailed overview of opium prices is provided based on Monthly Opium Price Report for Afghanistan, December 2009.

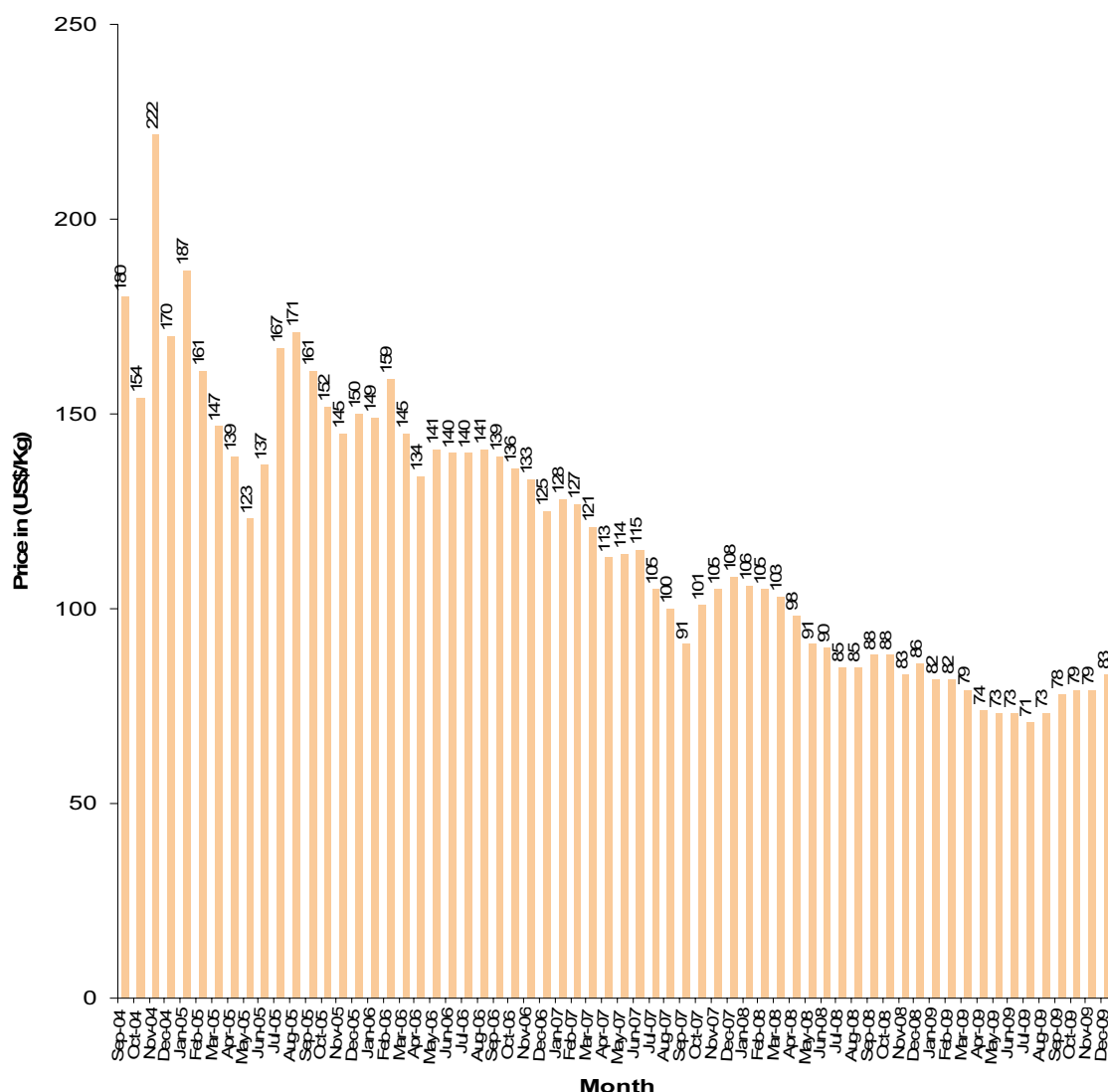
Figure 4 Regional average price of dry opium collected from traders, January 2005 – December 2009



Source: UNODC Monthly Opium Price Report for Afghanistan, December 2009

Since June 2007, prices of dry opium in the Western and Eastern regions remain higher than the prices in other regions. Increase in prices in the Western region can be attributed to its strategic position in bordering Iran. In the last few months, prices in Southern and Northern region are becoming lower than in other regions. Lower prices in the Southern region can be explained by the availability of opium stocks with the farmers and drug dealers, a result of bumper opium production in 2007 and 2008.

Figure 5 Average farm-gate prices for dry opium, September 2004 – December 2009



Source: UNODC Monthly Opium Price Report for Afghanistan, December 2009

Farmers in Afghanistan usually cultivate crops twice a year in irrigated areas, typically growing maize, rice, vegetables or cotton after harvesting opium or wheat. Some farmers grow cannabis after the first summer harvest. None of Afghanistan’s licit agricultural products can currently match the gross income per hectare from opium, although the difference is not as high as it used to be some years ago.

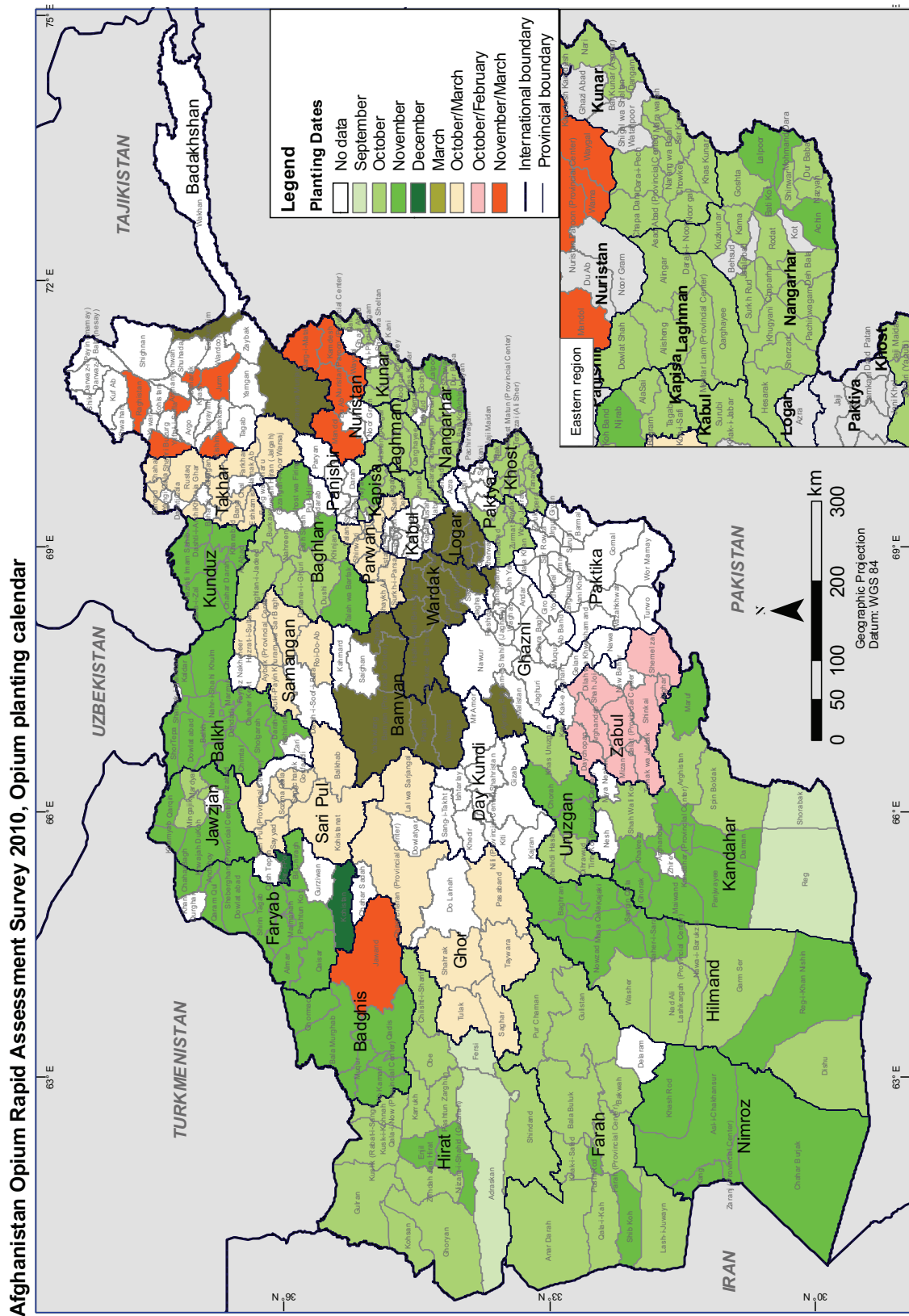
During ORAS, respondents were asked about the market prices of agricultural commodities. Comparison of prices collected during ORAS 2009 and ORAS 2010 show significant decrease in prices of opium and food grains.

Between December 2009 and December 2010, wheat prices decreased much more than opium prices. Potentially, this development renders opium cultivation more attractive.

Table 8 Prices of dry opium and food grains in 2009 and 2010

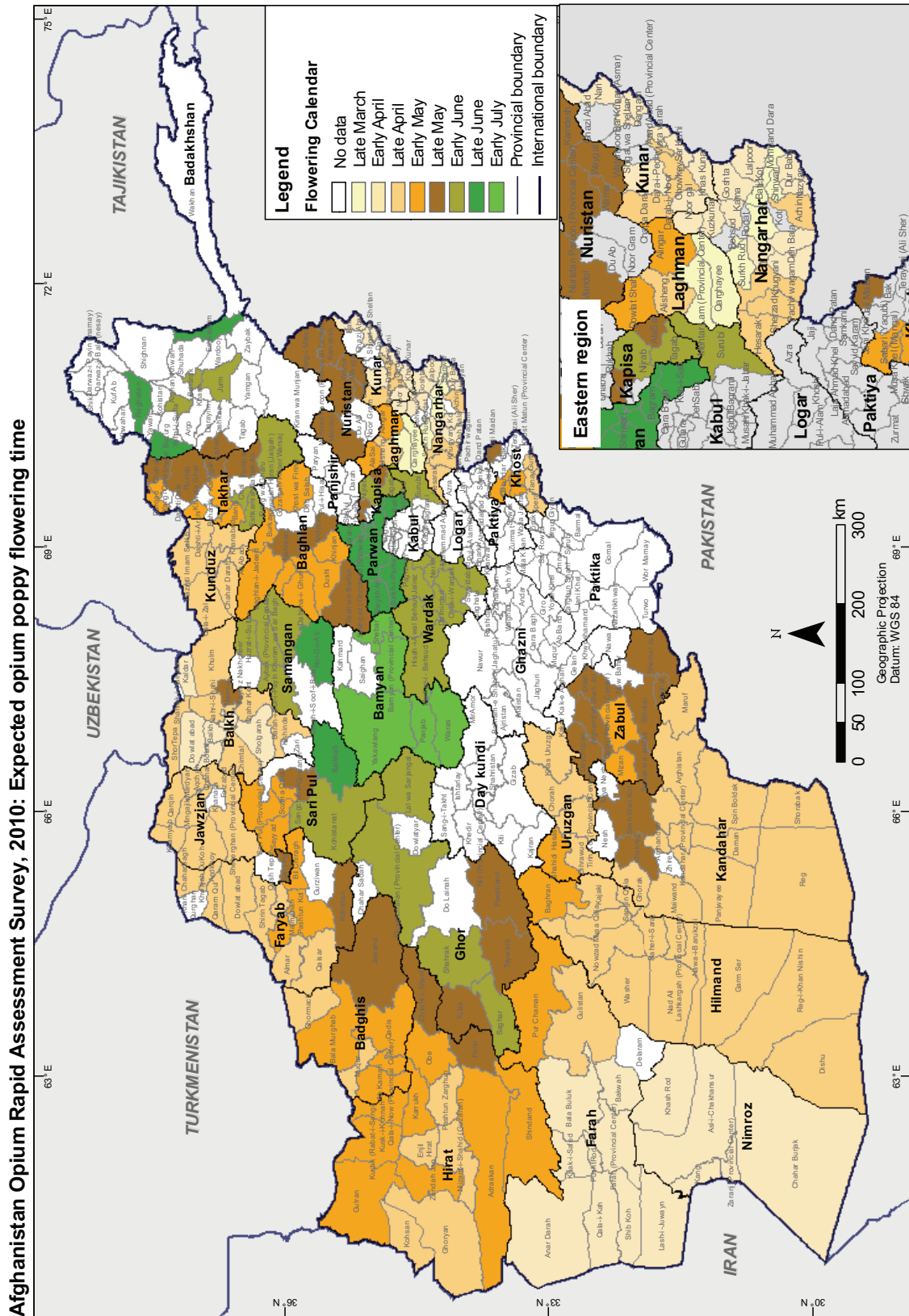
Product	Price (US\$/kg)		% change
	ORAS 2009	ORAS 2010	
Dry opium	85.16	80.23	-6%
Fresh opium	61.74	53.66	-13%
Wheat	0.6	0.34	-43%
Rice	1.12	1.03	-8%
Maize	0.42	0.26	-38%

Map 5: Opium poppy planting time



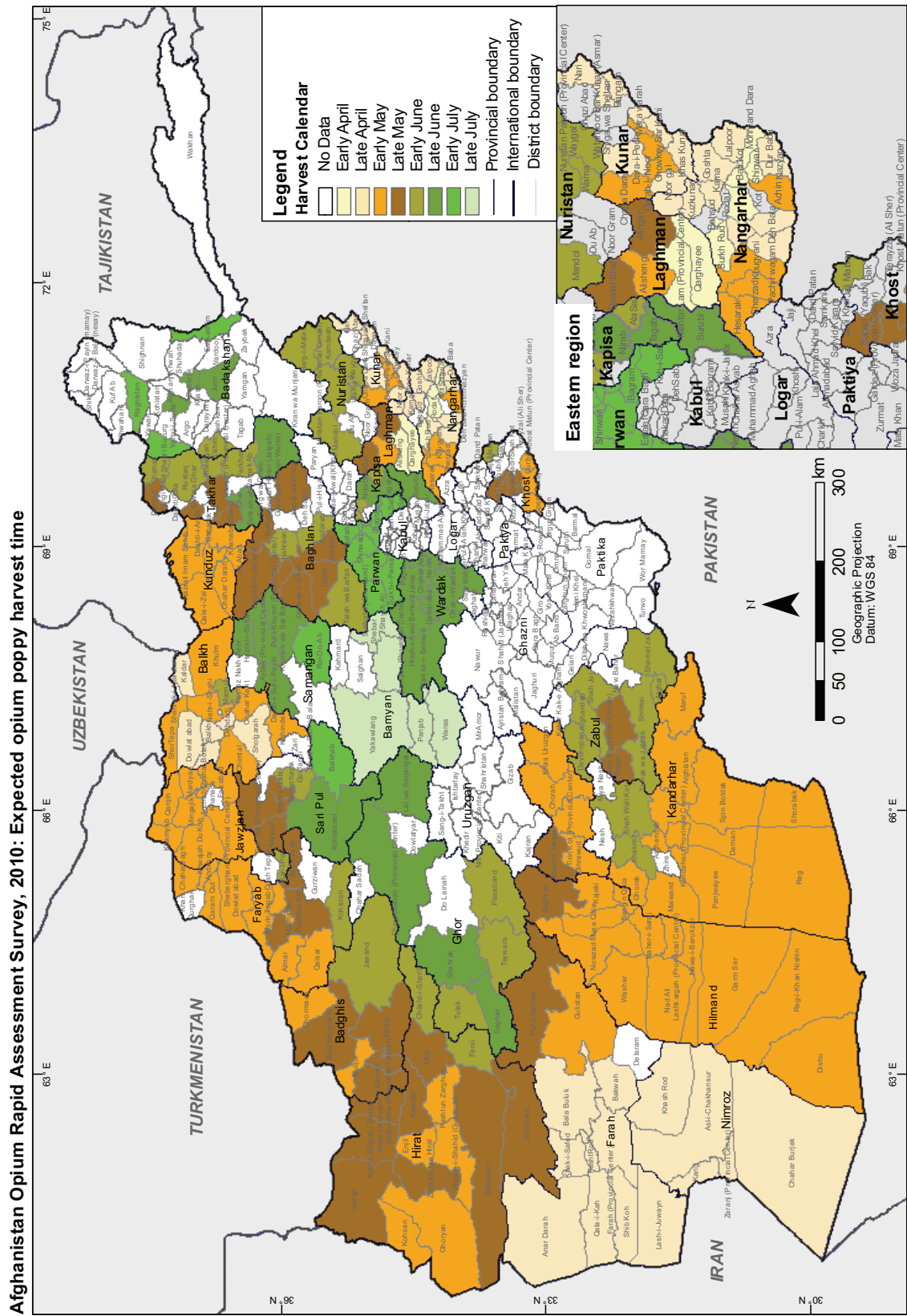
Source: Government of Afghanistan - National monitoring system implemented by UNODC
Note: The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations.

Map 6: Opium poppy flowering time



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.

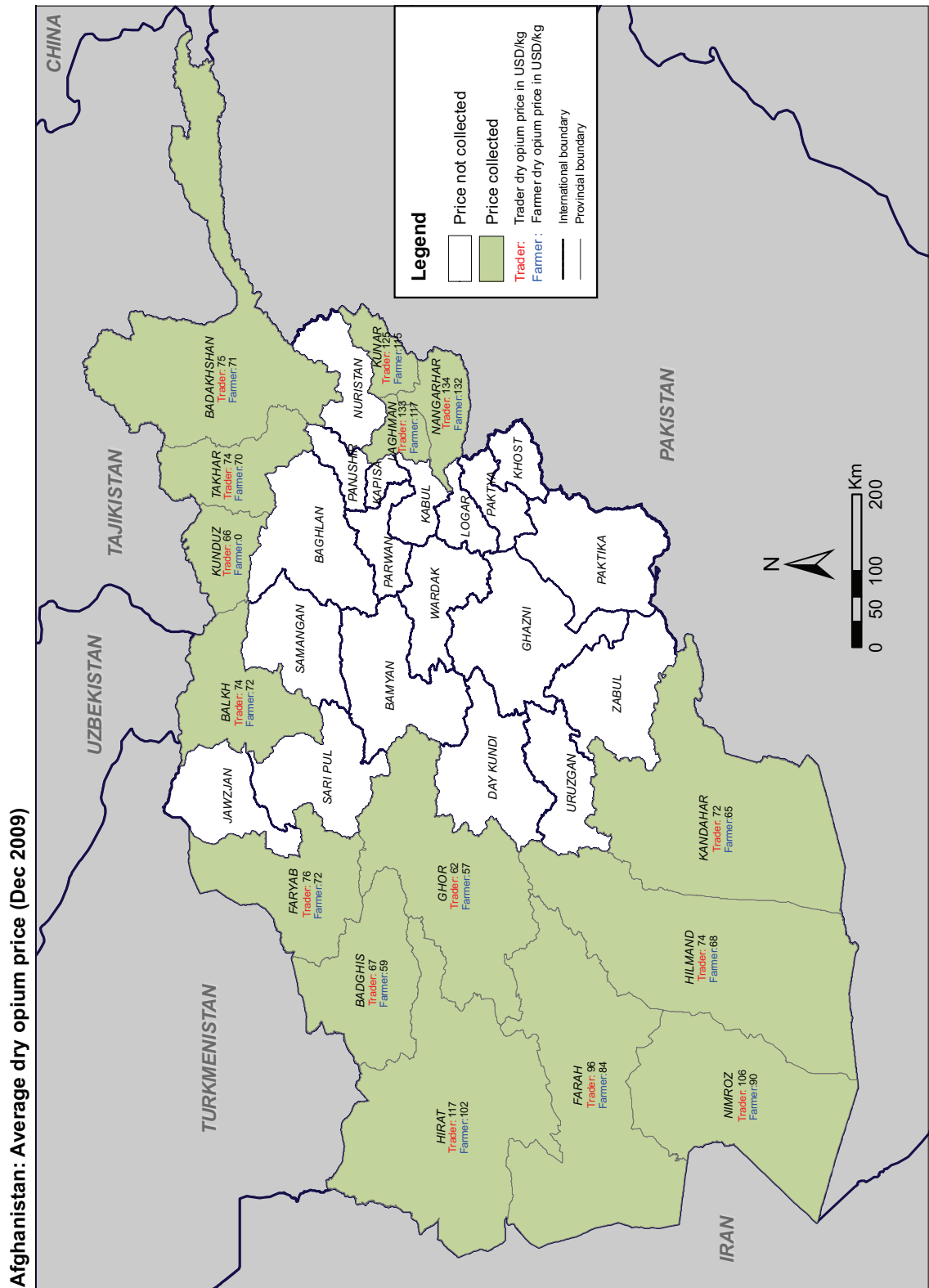
Map 7: Opium harvest time



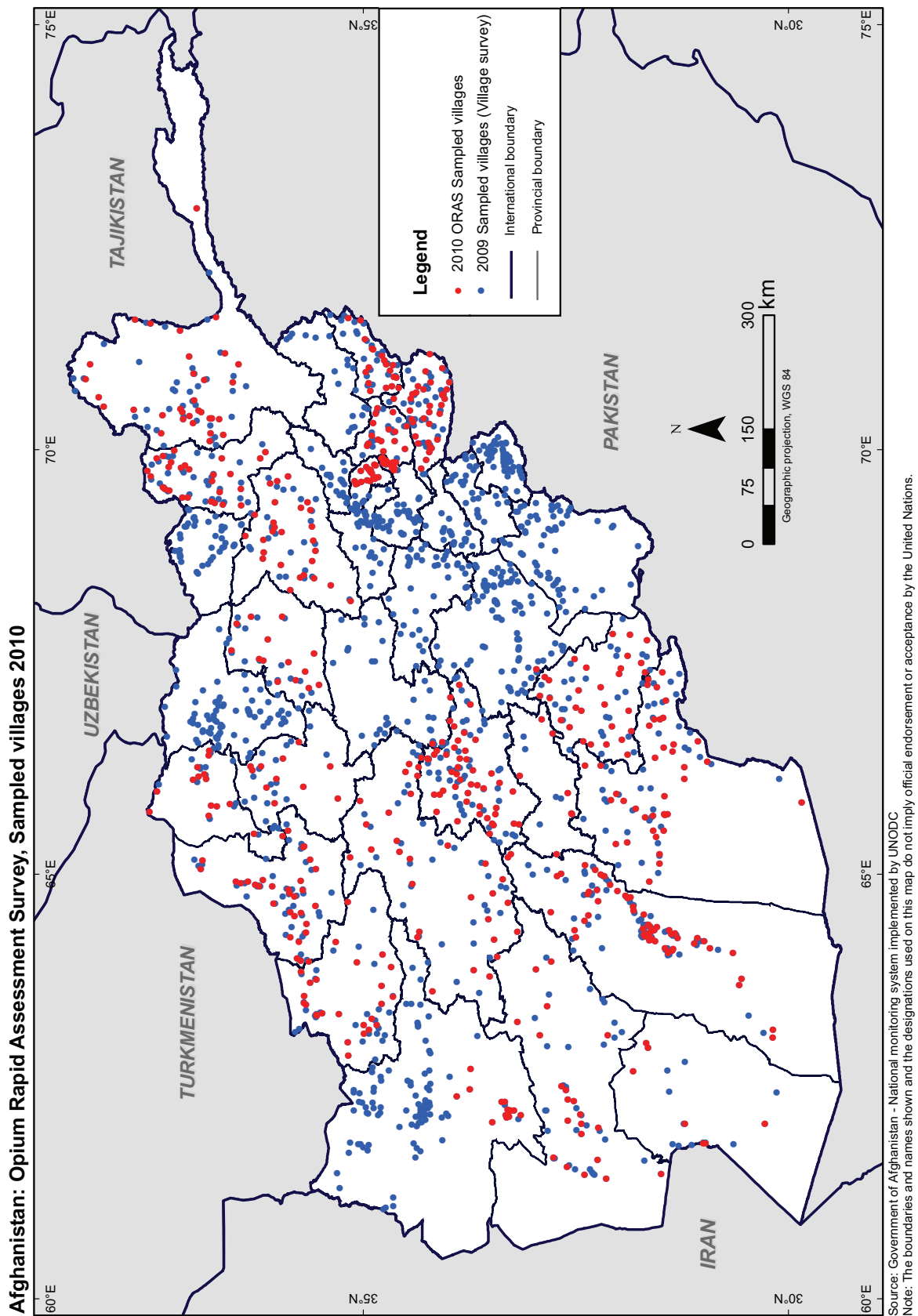
Afghanistan Opium Rapid Assessment Survey, 2010: Expected opium poppy harvest time

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

Map 8: Dry opium prices December 2009 (US\$/kg)

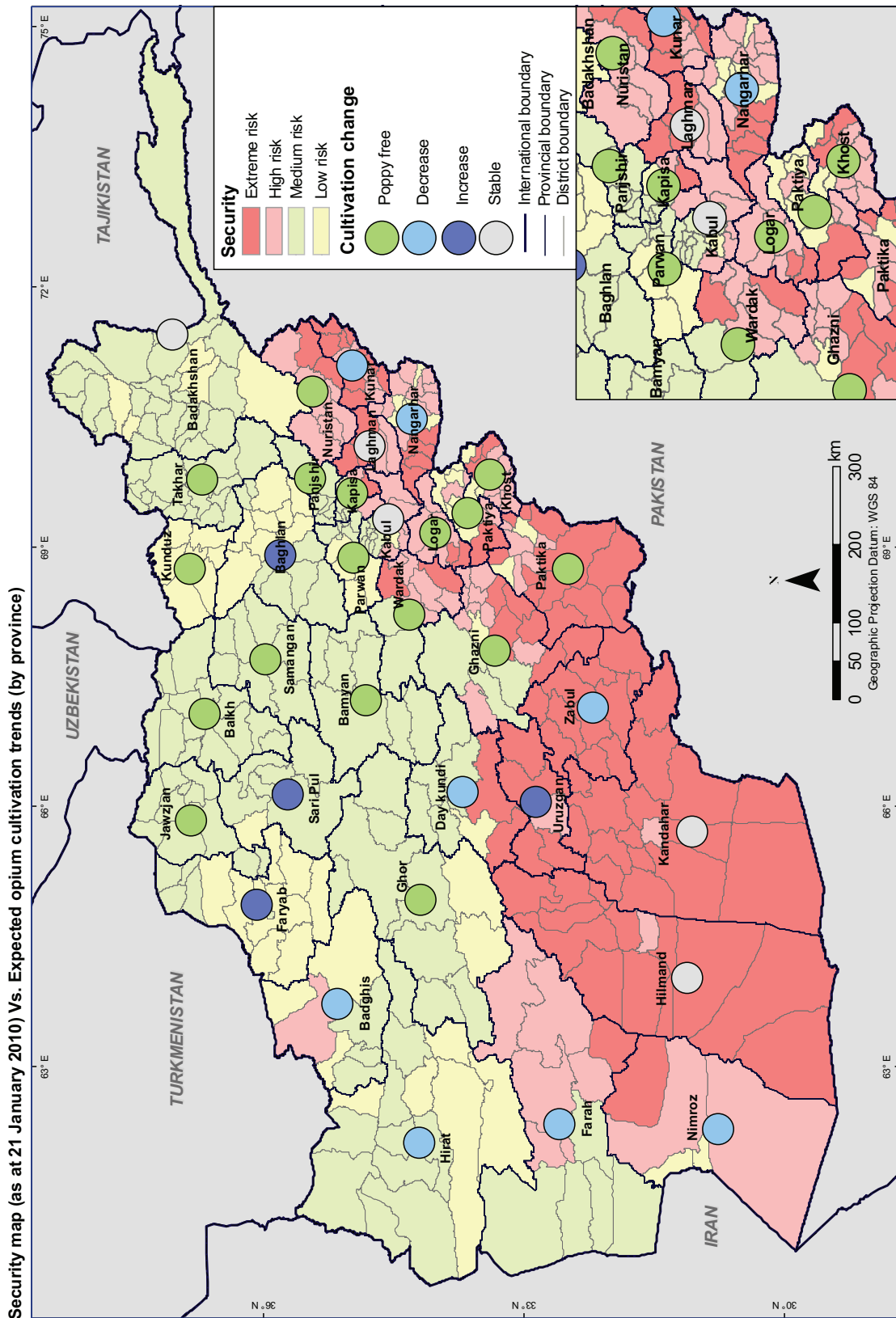


Map 9: Sampling frame and selected villages for the Winter Assessment 2010



Note: The villages surveyed for the Winter Assessment 2010 are a subsample of the villages surveyed during the 2009 Opium Survey.

Map 10: Cultivation trend vs. security situation



Security map (as at 21 January 2010) Vs. Expected opium cultivation trends (by province)

Source security map: UNDCS
 Source: MCN - UNODC Afghanistan Opium Rapid Assessment Survey, 2010 (http://www.unodc.org/unodc/en/crop_monitoring.html)
 Note: The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations.

2. FINDINGS BY PROVINCE

2.1. NORTH-EASTERN REGION

BADAKHSHAN PROVINCE

Interviews with the selected village headmen indicated that cultivation level in 2010 is low as a result of effective information campaigns against opium cultivation and eradication in 2009. In 2009, opium cultivation in Badakhshan increased sharply by 179%. It is expected to remain stable in 2010. The opium cultivation is expected to increase moderately in Baharak, Tagab and Khash districts, while there could be a slight decrease in Faizabad and Wardooz districts. The situation will be clearer during the upcoming spring cultivation season (March/April 2010).

Opium cultivation details:

Cultivation in 2009 (hectares)	557
Cultivation practices	Irrigated and rain-fed
Projected trends in 2010	Stable
Cultivation level	Low
Planting time	Autumn/spring
Expected main harvest time	End of June
Security situation	Good

TAKHAR PROVINCE

Respondents in all districts reported no change in opium cultivation in 2010 and it is expected that Takhar remains poppy-free in 2010. Even though this province falls on a major trafficking route to Tajikistan (via the Chah Ab, Yangi Qala, Darqad and Rustaq districts).

Opium cultivation details:

Cultivation in 2009 (hectares)	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2010	Poppy-free
Cultivation level	Poppy-free
Planting time	Autumn/spring
Expected main harvest time	Mid-June
Security situation	Good

KUNDUZ PROVINCE

Respondents across all districts reported no change in opium cultivation in 2009 and it is likely that it will remain poppy-free.

Opium cultivation details:

Cultivation in 2009 (hectares)	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2010	Poppy-free
Cultivation level	Poppy-free
Planting time	Autumn
Expected main harvest time	Mid-May
Security situation	Good

2.2. EASTERN REGION

NANGARHAR PROVINCE

There could be moderate decrease in opium cultivation in Nangarhar province and the cultivation level seems to be low. The province can once again remain poppy-free with effective eradication efforts.

Opium cultivation details:

Cultivation in 2009 (hectares)	294
Cultivation practices	Irrigated
Projected trends in 2010	Moderate decrease
Cultivation level	Low
Planting time	Autumn
Expected main harvest time	Mid-April
Security situation	Poor

KUNAR PROVINCE

Opium cultivation in 2010 is expected to further decrease as it did in 2009. Low cultivation in Kunar province is attributed to pressure by the Governor as well as to high prices of food grains and low prices of opium. Main opium poppy growing districts in Kunar are Asadabad, Barkunar, Nari, Sirkanay and Chawkay.

Opium cultivation details:

Cultivation in 2009 (hectares)	164
Cultivation practices	Irrigated
Projected trends in 2010	Moderate decrease
Cultivation level	Low
Planting time	Autumn
Expected main harvest time	Mid-April
Security situation	Poor

LAGHMAN PROVINCE

Opium cultivation in Laghman province is expected to remain stable at low levels in 2010. Low cultivation in Laghman province is attributed to pressure by the Governor as well as to high prices of food grains and low prices of opium. In 2009 Qarghayi and Mihtarlam were the main poppy-cultivating districts.

Opium cultivation details:

Cultivation in 2009 (hectares)	135
Cultivation practices	Irrigated and rain-fed
Projected trends in 2010	Stable
Cultivation level	Insignificant
Planting time	Autumn
Expected main harvest time	Beginning of April
Security situation	Poor

NURISTAN PROVINCE

Nuristan is located at a high elevation and is expected to remain poppy-free in 2010 like in 2009.

Opium cultivation details:

Cultivation in 2009 (hectares)	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2010	Poppy-free
Cultivation level	Poppy-free
Planting time	Autumn
Expected main harvest time	Beginning of April
Security situation	Poor

KAPISA PROVINCE

Kapisa is expected to remain poppy-free in 2010 as in 2009.

Opium cultivation details:

Cultivation in 2009 (hectares)	Poppy-free
Cultivation practices	Irrigated
Projected trends in 2010	Poppy-free
Cultivation level	Poppy-free
Planting time	Autumn/spring
Expected main harvest time	Late May / early July
Security situation	Poor

NORTHERN REGION

BAGHLAN PROVINCE

Baghlan was poppy-free in 2009, however it is expected that there will be a moderate increase in opium cultivation in Baghlan-I-Jadeed, Dahana-I-Ghuri, Deh Salah and Pul-I-Hisar districts. The province could become poppy-free if spring opium cultivation is prevented.

Opium cultivation details:

Cultivation in 2009 (hectares)	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2010	Moderate increase
Cultivation level	Insignificant
Planting time	Autumn/spring
Expected main harvest time	End of May to mid-June
Security situation	Good (Poor at few places)

BAMYAN PROVINCE

Bamyan province is expected to remain poppy-free in 2010 like in 2009.

Opium cultivation details:

Cultivation in 2009 (hectares)	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2010	Poppy-free
Cultivation level	Poppy-free
Planting time	Spring
Expected main harvest time	Late July
Security situation	Good

BALKH PROVINCE

Balkh province is expected to remain poppy-free in 2010 like in 2009 and 2008. This trend may be attributed to successful campaigns by the Government against opium cultivation.

Opium cultivation details:

Cultivation in 2009 (hectares)	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2010	Poppy-free
Cultivation level	Poppy-free
Planting time	Autumn
Expected main harvest time	End of April
Security situation	Good

FARYAB PROVINCE

Faryab became poppy-free in 2009 from 291 ha opium cultivation in 2008. In 2010 it is expected to moderately increase in opium cultivation in districts of Bil Chiragh, Gurziwan and Kohistan.

Opium cultivation details:

Cultivation in 2009 (hectares)	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2010	Moderate increase
Cultivation level	Insignificant
Planting time	Autumn
Expected main harvest time	Mid-May
Security situation	Good (Poor at few places)

JAWZJAN PROVINCE

Jawzjan province was not a significant opium poppy-growing area until 2002. From 2002 to 2006, however, cultivation increased sharply. In 2009, the province was poppy-free, and it is expected to remain poppy-free in 2010 as well.

Opium cultivation details:

Cultivation in 2009 (hectares)	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2010	Poppy-free
Cultivation level	Poppy-free
Planting time	Autumn and spring
Expected main harvest time	Late May
Security situation	Good (Poor at few places)

SAMANGAN PROVINCE

Samangan province was poppy-free in 2007, 2008 and 2009. It is expected to remain poppy-free in 2010.

Opium cultivation details:

Cultivation in 2009 (hectares)	Poppy-free
Cultivation practices	Rain-fed and irrigated
Projected trends in 2010	Poppy-free
Cultivation level	Poppy-free
Planting time	Spring
Expected main harvest time	End of July
Security situation	Good

SARI PUL PROVINCE

Sari Pul province was poppy-free in 2008 and 2009. However, in 2010, there could be a moderate increase in cultivation in the districts of Kohistanat and Sayyad.

Opium cultivation details:

Cultivation in 2009 (hectares)	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2010	Moderate increase
Cultivation level	Low
Planting time	Spring
Expected main harvest time	Late June
Security situation	Good (Poor at few places)

CENTRAL REGION

GHAZNI PROVINCE

Ghazni province has been poppy-free since 2005. ORAS results suggest that the province will remain poppy-free in 2010 as well.

Opium cultivation details:

Cultivation in 2009 (hectares)	Poppy-free
Cultivation practices	Irrigated
Projected trends in 2010	Poppy-free
Cultivation level	Poppy-free
Planting time	Spring
Expected main harvest time	Late July
Security situation	Very poor

KHOST PROVINCE

Khost province has been poppy-free since 2007 and it is expected to remain poppy-free in 2010 as well.

Opium cultivation details:

Cultivation in 2009 (hectares)	Poppy-free
Cultivation practices	Irrigated
Projected trends in 2010	Poppy-free
Cultivation level	Poppy-free
Planting time	Spring
Expected main harvest time	Late May
Security situation	Poor

LOGAR PROVINCE

Logar province has been poppy-free since 2005 and it is expected to remain poppy-free in 2010..

Opium cultivation details:

Cultivation in 2009 (hectares)	Poppy-free
Cultivation practices	Irrigated
Projected trends in 2010	Poppy-free
Cultivation level	Poppy-free
Planting time	Spring/autumn
Expected main harvest time	May/June
Security situation	Poor

PAKTIKA PROVINCE

Paktika province has been poppy-free since 2004 and the same trend is expected to continue in 2009.

Opium cultivation details:

Cultivation in 2009 (hectares)	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2010	Poppy-free
Cultivation level	Poppy-free
Planting time	Spring
Expected main harvest time	June
Security situation	Poor

PAKTYA PROVINCE

Paktya province has been poppy-free since 2005 and the same trend is expected to continue in 2010.

Opium cultivation details:

Cultivation in 2009 (hectares)	Poppy-free
Cultivation practices	Irrigated
Projected trends in 2010	Poppy-free
Cultivation level	Poppy-free
Planting time	Spring
Expected main harvest time	June
Security situation	Poor

PARWAN PROVINCE

Parwan has been poppy-free since 2007 and it is expected to stay poppy-free in 2010 as well.

Opium cultivation details:

Cultivation in 2009 (hectares)	Poppy-free
Cultivation practices	Irrigated
Projected trends in 2010	Poppy-free
Cultivation level	Poppy-free
Planting time	Spring
Expected main harvest time	Late June
Security situation	Good

PANJSHIR PROVINCE

Panjshir province has always been poppy-free and it is expected to maintain the same status in 2010.

Opium cultivation details:

Cultivation in 2009 (hectares)	Poppy-free
Cultivation practices	Irrigated
Projected trends in 2010	Poppy-free
Cultivation level	Poppy-free
Planting time	Autumn
Expected main harvest time	May
Security situation	Very good

WARDAK PROVINCE

Wardak has been poppy-free since 2006 and it is expected to remain so in 2010.

Opium cultivation details:

Cultivation in 2009 (hectares)	Poppy-free
Cultivation practices	Irrigated
Projected trends in 2010	Poppy-free
Cultivation level	Poppy-free
Planting time	Autumn/spring
Expected main harvest time	Late May/early July
Security situation	Very poor

KABUL PROVINCE

There was 57% reduction in opium cultivation in Kabul province in 2009. The cultivation in 2010 is likely to remain stable. There is only one district namely Sarobi where opium is cultivated.

Opium cultivation details:

Cultivation in 2009 (hectares)	132
Cultivation practices	Irrigated
Projected trends in 2010	Stable
Cultivation level	Insignificant
Planting time	Autumn
Expected main harvest time	Late May
Security situation	Very good

SOUTHERN REGION

KANDAHAR PROVINCE

There was an increase in opium cultivation in Kandahar province in 2009 (35%). In 2010, cultivation level is expected to remain stable. The cultivation level would remain high. The main opium cultivation districts in 2009 were Khakrez, Miya Nishin, Nesh, Panjwayee, Zhari and Shah Walikot.

Opium cultivation details:

Cultivation in 2009 (hectares)	19,811
Cultivation practices	Irrigated
Projected trends in 2010	Stable
Cultivation level	High
Planting time	Autumn
Expected main harvest time	Beginning of May
Security situation	Very Poor

HILMAND PROVINCE

Cultivation level decreased in 2009 to around 69,833 ha as compared to 103,590 ha in 2008. In 2010, cultivation level is expected to remain stable. The main opium cultivation districts in 2009 were Bagran, Garmser (Hazarjuft), Kajaki, Lashkar Gah, Musa Qala, Nad Ali, Naway-i-Saraj, and Nawzad.

Opium cultivation details:

Cultivation in 2009 (hectares)	69,833
Cultivation practices	Irrigated
Projected trends in 2010	Stable
Cultivation level	High
Planting time	Autumn
Expected main harvest time	Beginning of May
Security situation	Very poor

URUZGAN PROVINCE

Uruzgan has traditionally been one of Afghanistan's major opium poppy-growing provinces. Opium cultivation reduced slightly in 2009 from 9,939 ha in 2008 to 9,224 ha in 2009. In 2010 cultivation is expected to moderately increase in the districts of Shahidi Hassas and Tirinkot.

Opium cultivation details:

Cultivation in 2009 (hectares)	9,224
Cultivation practices	Irrigated
Projected trends in 2010	Moderate increase
Cultivation level	High
Planting time	Autumn
Expected main harvest time	Mid-May
Security situation	Very poor

ZABUL PROVINCE

In 2009 there was a decrease of 51% in opium cultivation in Zabul province and it is further expected to moderately decrease in 2010. The main opium poppy growing districts in 2009 were Kakar (Khak-e-Afghan) , Mizan Day Chopan, Qalat, Shahjoy, Tarnak wa Jaldak, Shinkay, Shamulzayi, Naw Bahar, and Arghandab.

Opium cultivation details:

Cultivation in 2009 (hectares)	1,144
Cultivation practices	Irrigated
Projected trends in 2010	Moderate decrease
Cultivation level	Moderate
Planting time	Autumn
Expected main harvest time	Mid-May
Security situation	Very poor

DAY KUNDI PROVINCE

In 2009 Day Kundi experienced an increase of 32% in opium cultivation; however it is expected to decrease in 2010. The main opium poppy growing districts in 2009 were Gizab, Ishtarlay, Kiti and Miramor.

Opium cultivation details:

Cultivation in 2009 (hectares)	3,002
Cultivation practices	Irrigated
Projected trends in 2010	Moderate decrease
Cultivation level	Moderate
Planting time	Spring
Expected main harvest time	July
Security situation	Poor

WESTERN REGION

HIRAT PROVINCE

In 2009 there was an increase in opium cultivation in Hirat province (109%). In 2010, a moderate decrease is expected in opium cultivation in the province. The level of opium cultivation should continue to remain low in 2010 and it could become poppy-free if effective poppy eradication measures are implemented.

Opium cultivation details:

Cultivation in 2009 (hectares)	556
Cultivation practices	Irrigated
Projected trends in 2010	Moderate decrease
Cultivation level	Low
Planting time	Autumn/spring
Expected main harvest time	Late May/late June
Security situation	Good

FARAH PROVINCE

Opium cultivation decreased by 17% in 2009 compared to 2008. In 2010, opium cultivation is expected to decrease in all the opium growing districts namely Bala Buluk, Bakwa, Khaki Safed, Pur Chaman, Pusht Rod, Gulistan, Farah, Qalay-I-Kah, Shib Koh, Anar Dara and Lash Wa Jauwayn. However the cultivation level would remain high in the province

Opium cultivation details:

Cultivation in 2009 (hectares)	12,405
Cultivation practices	Irrigated
Projected trends in 2010	Moderate decrease
Cultivation level	High
Planting time	Autumn
Expected main harvest time	Early May
Security situation	Very Poor

NIMROZ PROVINCE

In 2009 there was a decrease of in opium cultivation. In 2010, opium cultivation is expected to moderately decrease further in the opium growing districts namely Khash Rod, Asl-i-Chakhansur Chahar Burja and Chakhansur. The level of cultivation would be low. However, Nimroz will continue to play an important role in trafficking given its location at the border with Iran and Pakistan.

Opium cultivation details:

Cultivation in 2009 (hectares)	428
Cultivation practices	Irrigated
Projected trends in 2010	Moderate decrease
Cultivation level	Low
Planting time	Autumn
Expected main harvest time	Mid-April
Security situation	Very Poor

GHOR PROVINCE

Ghor province was poppy-free in 2009 and is expected to remain poppy-free in 2010. Ghor is one of the main opium-trafficking provinces.

Opium cultivation details:

Cultivation in 2009 (hectares)	Poppy-free
Cultivation practices	Irrigated
Projected trends in 2010	Poppy-free
Cultivation level	Poppy-free
Planting time	Spring
Expected main harvest time	Late June
Security situation	Good (Poor at few places.)

BADGHIS PROVINCE

In 2009 there was a strong increase in opium cultivation (822%) compared to 2008 in Badghis province. In 2010 however, a moderate decrease is expected in the province. The cultivation level would remain high. The main poppy growing districts are Jaywand and Bala Murghab.

Opium cultivation details:

Cultivation in 2009 (hectares)	5,411
Cultivation practices	Irrigated and rain-fed
Projected trends in 2010	Moderate decrease
Cultivation level	High
Planting time	Spring
Expected main harvest time	Mid-June
Security situation	Good (Poor in one district)

3. METHODOLOGY

The Winter Opium Rapid Assessment, including training and deployment, was conducted from 6 December 2008 to 7 January 2010 by 86 local field surveyors. The survey was jointly planned and implemented by the Ministry of Counter-Narcotics (MCN) of the Government of Afghanistan and UNODC.

Sampling framework

A total of 547 villages in 188 districts were selected across all poppy growing provinces, however only 536 villages could be surveyed.

The villages were selected from sampled villages of the 2009 village survey using a systematic random selection technique. No sampling was done for the 12 provinces that have been poppy-free for many years (Logar, Paktiya, Paktika, Panjshir, Ghazni, Wardak, Parwan, Kundus, Balkh, Nuristan, Bamyán and Khost).

The design and size of the sample facilitated the establishment of cultivation trends; the sample is not designed for calculating quantitative areas or production estimates. In addition to the sample villages, the surveyors, using their knowledge of the local situation, visited other areas in the province to complement their assessment both of opium cultivation trends and the security situation throughout the province.

Training of surveyors and data collection

The surveyors were selected on the basis of a written test, their experience in conducting opium poppy surveys, knowledge of local customs and their acceptance by local communities. During the training period, a total nine survey coordinators and 86 surveyors were trained in the use of the survey form and survey techniques.

The surveyors conducted structured interviews with the headmen of selected villages in all provinces. UNODC and MCN coordinators monitored data quality and the progress of the survey closely.



ORAS training in Eastern region



ORAS monitoring in Eastern region



ORAS training in Southern region



ORAS training of the trainers in Kabul

Debriefing

At the end of the survey, surveyors were debriefed by survey coordinators, reporting on their findings in the areas they had visited and providing an assessment of various factors that influence opium cultivation. The debriefing information was also used to understand the socio-political situation; difficulties encountered in conducting the survey; the level of control exercised by Governors over their respective provinces; the presence of anti-Government elements and the resulting impact on opium cultivation; corruption etc.

ANNEX 1: Cultivation levels from 2005 to 2009 and expected trends in 2010

PROVINCE	Cultivation 2005 (ha)	Cultivation 2006 (ha)	Cultivation 2007 (ha)	Cultivation 2008 (ha)	Cultivation 2009 (ha)	Change 2008-2009 (ha)	Change 2008-2009 (%)	2010 Cultivation trend
Kabul	Poppy free	80	500	310	132	-178	-57%	Stable
Khost	Poppy free	133	Poppy free	Poppy free	Poppy free	NA	NA	Poppy free
Logar	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	NA	NA	Poppy free
Paktya	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	NA	NA	Poppy free
Panjshir	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	NA	NA	Poppy free
Parwan	Poppy free	124	Poppy free	Poppy free	Poppy free	NA	NA	Poppy free
Wardak	106	Poppy free	Poppy free	Poppy free	Poppy free	NA	NA	Poppy free
Ghazni	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	NA	NA	Poppy free
Paktika	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	NA	NA	Poppy free
Central Region	106	337	500	310	132	-178	-57%	
Kapisa	115	282	835	436	Poppy free	NA	NA	Poppy free
Kunar	1,059	932	446	290	164	-126	-43%	Moderate decrease
Laghman	274	710	561	425	135	-290	-68%	Stable
Nangarhar	1,093	4,872	18,739	Poppy free	294	NA	NA	Moderate decrease
Nuristan	1,554	1,516	Poppy free	Poppy free	Poppy free	NA	NA	Poppy free
Eastern Region	4,095	8,312	20,581	1,151	593	-558	-48%	
Badakhshan	7,370	13,056	3,642	200	557	357	179%	Stable
Takhar	1,364	2,178	1,211	Poppy free	Poppy free	NA	NA	Poppy free
Kunduz	275	102	Poppy free	Poppy free	Poppy free	NA	NA	Poppy free
North-eastern Region	9,009	15,336	4,853	200	557	357	179%	
Baghlan	2,563	2,742	671	475	Poppy free	NA	NA	Moderate increase
Balkh	10,837	7,232	Poppy free	Poppy free	Poppy free	NA	NA	Poppy free
Bamyan	126	17	Poppy free	Poppy free	Poppy free	NA	NA	Poppy free
Faryab	2,665	3,040	2,866	291	Poppy free	NA	NA	Moderate increase
Jawzjan	1,748	2,024	1,085	Poppy free	Poppy free	NA	NA	Poppy free
Samangan	3,874	1,960	Poppy free	Poppy free	Poppy free	NA	NA	Poppy free
Sari Pul	3,227	2,252	260	Poppy free	Poppy free	NA	NA	Moderate increase
Northern Region	25,040	19,267	4,882	766	Poppy free	NA	NA	
Hilmand	26,500	69,324	102,770	103,590	69,833	-33,757	-33%	Stable
Kandahar	12,989	12,619	16,615	14,623	19,811	5,188	35%	Stable
Uruzgan	2,024	9,703	9,204	9,939	9,224	-715	-7%	Moderate increase
Zabul	2,053	3,210	1,611	2,335	1,144	-1,191	-51%	Moderate decrease
Day Kundi	2,581	7,044	3,346	2,273	3,002	729	32%	Moderate decrease
Southern Region	46,147	101,900	133,546	132,760	103,014	-29,746	-22%	
Badghis	2,967	3,205	4,219	587	5,411	4,824	822%	Moderate decrease
Farah	10,240	7,694	14,865	15,010	12,405	-2605*	(-17%)	Moderate decrease
Ghor	2,689	4,679	1,503	Poppy free	Poppy free	NA	NA	Poppy free
Hirat	1,924	2,287	1,525	266	556	290	109%	Moderate decrease
Nimroz	1,690	1,955	6,507	6,203	428	-5775*	(-93%)	Moderate decrease
Western Region	19,510	19,820	28,619	22,066	18,800	-3,266	-15%	
Total (rounded)	104,000	165,000	193,000	157,000	123,000	-34,000	-22%	Overall stable

*Due to administrative boundary changes, the 2009 estimates for Farah and Nimroz were calculated considering parts of Khash Rod district, the main cultivating district in Nimroz, as being part of Farah province. The 2008 figures include all of Khash Rod district in Nimroz province.

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