



Afghanistan

Opium Winter Rapid Assessment Survey



February 2008

ABBREVIATIONS

UNODC	United Nations Office on Drugs and Crime
ICMP	Illicit Crop Monitoring Programme (UNODC)
MCN	Ministry of Counter-Narcotics
ORAS	Opium Winter Rapid Assessment Survey
RAS	Research and Analysis Section (UNODC)
US\$	United States dollars

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The following organizations and individuals contributed to the implementation of the 2008 Opium Winter Rapid Assessment Survey in Afghanistan and to the preparation of this report:

Survey and Monitoring Directorate of the Ministry of Counter-Narcotics:

Ibrahim Azhar (Director)

Mir Abdullah (Deputy Director)

Survey Coordinators: Fazal Karim (for the central region), Abdul Mateen (Nangarhar province), Abdul Latif Ehsan (Hirat province), Fida Mohammad (Balkh province), Mohammed Ishaq Anderabi (Badakhshan province)

Remote Sensing Analysts: Sayed Mehdi and Ghulam Abbas

Technical staff: Mohammad Khyber Wardak (Database Expert), Sahar (Data Clerk)

United Nations Office on Drugs and Crime (Kabul)

Christina Oguz (Country Representative)

Shirish Ravan (Project Coordinator, ICMP)

Nazir Ahmad Shah (National Project Coordinator)

Ziauddin Zaki (Data Analyst)

Abdul Mannan Ahmadzai (Survey Assistant)

Provincial Coordinators: Fazal Mohammad Fazli (southern region), Mohammad Alam Ghalib (eastern region), Altaf Hussain Joya (western region), Mohammed Alem Yaqubi (north-eastern region), Lutfi Rahman (north region)

Survey Coordinators: Abdul Basir Basiret (eastern region), Abdul Jalil (northern region), Abdul Qadir Palwal (southern region), Fawad Alahi (western region), Mohammad Rafi (north-eastern region), Rahimullah Omar (central region), Sayed Ahmad (southern region), Abdul Rahim Marikh (eastern region), Fardin Osmani (northern region)

Eradication reporters: Ramin Sobhi and Zia Ulhaqa

United Nations Office on Drugs and Crime (Tashkent)

Hakan Demirbüken (Regional Monitoring Expert for South-West Asia and Survey Project Supervisor, RAS/ICMP)

United Nations Office on Drugs and Crime (Vienna)

Anja Korenblik (Programme Manager, RAS/ICMP), Thibault le Pichon (Chief, RAS), Martin Raithelhuber (Programme Officer, RAS/ICMP), Thomas Pietschmann (Research Officer, RAS)

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PREFACE

The opium poppy seedlings are still under the ground or snow in most parts of Afghanistan, but this Winter Assessment broadly anticipates what can be expected when they bloom this spring. Several findings deserve attention.

First, field visits and interviews with village leaders indicate that cultivation levels will be broadly similar to, perhaps slightly lower than, last year's record harvest. While it is encouraging that the dramatic increases of the past few years seem to be leveling off, the total amount of opium being harvested remains shockingly high. Europe, and other major heroin markets, should brace themselves for the health and security consequences.

Second, the cultivation trends for 2008 deepen a dichotomy evident last year: a possibly growing number of opium-free provinces in the north and center of the country; and possibly higher levels of cultivation in the south and west – the areas of greatest instability.

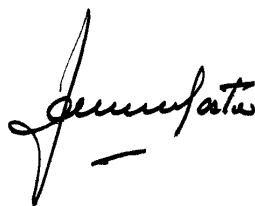
Third, the positive trend in the north is enhanced by decreases in cultivation in Nangarhar and Badakhshan. This is excellent news since these two provinces have been significant exceptions to the rule of an opium-free north-east.

Fourth, the south and southwest continues to grow opium at an alarming rate, perhaps greater than last year when it accounted for 78 percent of total opium cultivation in Afghanistan. This is a windfall for anti-Government forces who take a tax (*usher*) of approximately 10 per cent of opium cultivation in regions under their control – further evidence of the dangerous link between opium and insurgency.

Fifth, this survey, for the first time, includes information about opium stocks. Readers will note a major difference between amounts stock-piled by farmers in villages in the south as opposed to limited reserves in the north. Nevertheless, taking into account the massive amounts of opium that have been produced in the past few years – which far exceed world demand – it would appear that the bulk of this surplus is not being stored by farmers. Which begs the question, where is it?

Sixth, another disturbing trend is the steady rise in cannabis cultivation, giving Afghanistan the dubious distinction of being one of the world's biggest suppliers of cannabis in addition to providing over 90% of the world's illicit opium.

These are order of magnitude figures – the actual harvest will depend on the effectiveness of eradication. The volume of opium production (and eventually heroin) will further depend on the yield, which last year was at a record level. Based on this evidence there is a good chance that the high-water mark reached in 2007 will begin to recede.



Antonio Maria Costa

Executive Director

United Nations *Office on Drugs and Crime*

1. FINDINGS

1.1. GENERAL FINDINGS

Opium poppy cultivation trends

Following a record level of 193,000 hectares (ha) of opium poppy cultivation in 2007, the Opium Winter Rapid Assessment Survey forecasts the following cultivation trends in 2008:

- A sharp increase in cultivation in Nimroz province (western region), with a significant level of cultivation in that province;
- An increase in cultivation in six provinces, mainly in the southern (Kandahar and Uruzgan) and western (Farah, Badghis and Ghor) regions, with a significant level of cultivation in those provinces;
- Cultivation trends are expected to remain stable in five provinces, namely Hilmand, Day Kundi and Zabul in the south and Sari Pul and Takhar in the north. The southern region accounted for 69 per cent of total opium poppy cultivation in 2007; little change is expected in 2008.
- Twelve provinces are likely to remain poppy-free, mainly in the central and northern regions. The number of poppy-free provinces may increase to 14 or 15 if spring cultivation is controlled through effective prevention campaigns and eradication efforts.

Overall, opium poppy cultivation in Afghanistan is likely to decrease slightly in 2008. However, early eradication efforts and an effective awareness campaign to control spring cultivation may reinforce this trend and bring about a further decrease in cultivation.

Table 1: Opium poppy cultivation trends in 2008

Cultivation trend in 2008	No. of provinces	Provinces
Poppy-free	12	Balkh, Bamyan, Ghazni, Khost, Kunduz, Logar, Nuristan, Paktika, Paktya, Panjshir, Parwan, Wardak
Decrease	7	Badakhshan, Baghlan, Hirat, Kabul, Kapisa, Kunar, Laghman
Sharp decrease	3	Faryab, Jawzjan, Nangarhar
Increase	6	Badghis, Farah, Ghor, Kandahar, Samangan, Uruzgan
Sharp increase	1	Nimroz,
Stable	5	Day Kundi, Hilmand, Sari Pul, Takhar, Zabul

In 2007, poppy cultivation increased in eight provinces but decreased in 26 provinces, as a result of which 13 provinces became poppy-free (Annual Opium Survey Report for 2007, UNODC). A total area of 193,000 ha was under opium poppy cultivation in 2007, which represents an increase of 17 per cent as compared to 2006. That increase was chiefly attributable to large-scale poppy cultivation in the south, particularly in Hilmand province, which alone accounted for 53 per cent of total cultivation. A decrease in cultivation was observed in the north-eastern and northern provinces in 2007.

The 2008 ORAS indicates a decrease in poppy cultivation in the east, north and north-east, but an increase in the main poppy-growing areas of the southern and western provinces, which may result in an overall slight decrease in poppy cultivation in 2008.



Alfalfa in Nangarhar province



Wheat in Nangarhar province



Cabbage in central region



Poppy cultivation in Kandahar province

Key highlights of ORAS

The 2008 ORAS highlights the following key cultivation trends as compared to 2007:

- A sharp increase in cultivation in Nimroz province, mainly in the Khash Rod district;
- A sharp decrease in Nangarhar province;
- An increase in the Farah, Badghis, Kandahar and Uruzgan provinces;
- Little change is expected in Hilmand province, which accounted for 53 per cent of total opium cultivation in Afghanistan in 2007;
- At least 12 provinces continue to be poppy-free. Samangan province may remain poppy-free if the Government's public awareness campaign to prevent poppy cultivation is implemented more intensively. Kabul province may become poppy-free if poppy cultivation is eliminated in the Surobhi district.

A sharp decrease in opium poppy cultivation is expected in Nangarhar province in 2008, as was the case in 2005. This forecast is based on the extensive eradication of opium poppy crops (around 8,000 poppy fields) conducted by Governors in 2007, the effective implementation of the awareness campaign between September and November 2007 and agreement between the Governor of Nangarhar province and key Shura leaders.

Balkh is likely to remain poppy-free again in 2008, while a further decrease is expected in Badakhshan province and a sharp decrease in a number of other northern provinces, including Jawzjan and Faryab.

Table 2: Opium poppy cultivation levels from 2004 to 2007 and expected trends in 2008

PROVINCE	Cultivation 2004 (ha)	Cultivation 2005 (ha)	Cultivation 2006 (ha)	Cultivation 2007 (ha)	Change 2006-2007 (ha)	Change 2006-2007 (%)	2008 cultivation trend
Kabul	282	0	80	500	420	525%	Decrease
Khost	838	0	133	0	-133	-100%	Poppy-free
Logar	24	0	0	0	0	0%	Poppy-free
Paktya	1,200	0	0	0	0	0%	Poppy-free
Panjshir	0	0	0	0	0	0%	Poppy-free
Parwan	1,310	0	124	0	-124	-100%	Poppy-free
Wardak	1,017	106	0	0	0	0%	Poppy-free
Ghazni	62	0	0	0	0	0%	Poppy-free
Paktika	0	0	0	0	0	0%	Poppy-free
Central region	4,733	106	337	500	163	48%	
Kapisa	522	115	282	835	553	196%	Decrease
Kunar	4,366	1,059	932	446	-486	-52%	Decrease
Laghman	2,756	274	710	561	-149	-21%	Decrease
Nangarhar	28,213	1,093	4,872	18,739	13,867	285%	Strong decrease
Nuristan	764	1,554	1,516	0	-1,516	-100%	Poppy-free
Eastern region	36,621	4,095	8,312	20,581	12,269	148%	
Badakhshan	15,607	7,370	13,056	3,642	-9,414	-72%	Decrease
Kunduz	224	275	102	0	-102	-100%	Poppy-free
Takhar	762	1,364	2,178	1,211	-967	-44%	Stable
North-eastern region	16,593	9,009	15,336	4,853	-10,483	-68%	
Baghlan	2,444	2,563	2,742	671	-2,071	-76%	Decrease
Balkh	2,495	10,837	7,232	0	-7,232	-100%	Poppy-free
Bamyan	803	126	17	0	-17	-100%	Poppy-free
Faryab	3,249	2,665	3,040	2,866	-174	-6%	Strong decrease
Jawzjan	1,673	1,748	2,024	1,085	-939	-46%	Strong decrease
Samangan	1,151	3,874	1,960	0	-1,960	-100%	Increase
Sari Pul	1,974	3,227	2,252	260	-1,992	-88%	Stable
Northern region	13,789	25,040	19,267	4,882	-14,385	-75%	
Hilmand	29,353	26,500	69,324	102,770	33,446	48%	Stable
Kandahar	4,959	12,989	12,619	16,615	3,996	32%	Increase
Uruzgan	11,080	2,024	9,703	9,204	-499	-5%	Increase
Zabul	2,977	2,053	3,210	1,611	-1,599	-50%	Stable
Day kundi	N/A	2,581	7,044	3,346	-3,698	-52%	Stable
Southern region	48,369	46,147	101,900	133,546	31,646	31%	
Badghis	614	2,967	3,205	4,219	1,014	32%	Increase
Farah	2,288	10,240	7,694	14,865	7,171	93%	Increase
Ghor	4,983	2,689	4,679	1,503	-3,176	-68%	Increase
Hirat	2,531	1,924	2,287	1,525	-762	-33%	Decrease
Nimroz	115	1,690	1,955	6,507	4,552	233%	Strong increase
Western region	10,531	19,510	19,820	28,619	8,799	44%	
Total (rounded)	131,000	104,000	165,000	193,000	28,000	17%	Overall slight decrease

The Khash Rod district of Nimroz province remains an important poppy-growing area. New agricultural areas in the desert were observed with the help of satellite images in 2007. Farmers are using deep wells to irrigate these new agricultural areas, specifically to grow opium poppy. A further increase is therefore expected in Nimroz province.

Opium poppy cultivation is expected to remain at the level of 2007 (102,770 ha) in Hilmand province, which is a major concern for 2008. An increase in opium poppy cultivation is expected in the Kandahar, Uruzgan and Farah provinces, contributing to a further increase in the south and west of Afghanistan and thus widening the north-south divide.

Additional poppy crops may be sown in upland areas of the northern and central provinces before mid-March, particularly in rain-fed areas, unless prompt actions are taken to prevent cultivation. In 2008, rainfall and water availability are expected to be extremely good throughout Afghanistan, which may result in good opium poppy yields. In 2007, opium yield was better than average (42.5 kg/ha) due to good availability of water.

Although the Government and international stakeholders remain committed to eradication, no eradication activities had been initiated in any part of the country by the time this survey was completed in mid-January 2008.

1.2. NUMBER OF VILLAGES GROWING OPIUM POPPY

Of the 469 villages visited, 148 (32 per cent) reported that they would grow opium poppy in 2008. The percentage of poppy-growing villages among those visited varies from region to region.

Table 3: Proportion of opium poppy-growing villages by region

Region	Non-poppy growing	Poppy growing
Central	99%	1%
East	92%	8%
North-east	76%	24%
North	87%	13%
South	15%	85%
West	63%	37%
Total	68%	32%

In the southern region, 85 per cent of the villages visited reported poppy cultivation in 2008. In Helmand province, all villages (30) reported poppy cultivation in 2008. Ninety-two per cent of villages visited in Uruzgan province, 83 per cent of those in Kandahar province and 77 per cent of those in Farah province reported likewise. However, no poppy cultivation was reported in the villages visited in Nangarhar (25) and Balkh (18) provinces, while 28 per cent of villages visited in Badakhshan reported low levels of poppy cultivation in 2008.

1.3. CASH ADVANCES RECEIVED FOR OPIUM POPPY CULTIVATION

Villages in the Day Kundi, Hilmand, Laghman, Zabul, Badakhshan, Kandahar and Uruzgan provinces reported that they had received cash advances from drug traffickers to grow opium poppy. The ORAS indicates that 29 per cent of opium poppy-growing villages received such advances.

Table 4: Cash advances received (by province)

Province	No advance received	Advance received	Total	Advance received (percentage of villages)
Day Kundi	4	8	12	67%
Hilmand	12	18	30	60%
Laghman	2	1	3	33%
Zabul	9	4	13	31%
Badakhshan	7	3	10	30%
Kandahar	19	7	26	27%
Farah	6	1	7	14%
Uruzgan	11	1	12	8%
Badghis	7		7	0%
Baghlan	2		2	0%
Faryab	2		2	0%
Ghor	4		4	0%
Hirat	3		3	0%
Khost	1		1	0%
Kunar	2		2	0%
Nimroz	4		4	0%
Samangan	2		2	0%
Sari Pul	5		5	0%
Takhar	3		3	0%
Total	105	43	148	29%

1.4. FAMILIES INVOLVED IN OPIUM CULTIVATION

The percentage of families involved in opium cultivation in the villages visited is strikingly high in the southern provinces, closely followed by that for the western provinces. A high proportion of families are reported to be involved in opium cultivation in the following provinces: Hilmand (93 per cent), Uruzgan (66 per cent), Zabul (46 per cent), Nimroz (35 per cent), Day Kundi (26 per cent), Farah (24 per cent) and Kandahar (22 per cent).

1.5. AGRICULTURAL ASSISTANCE

Of the 469 villages visited, 152 have received agricultural assistance (32 per cent) in the form of seeds, fertilizers and irrigation facilities. Seventy-six per cent of villages that have received agricultural assistance have not cultivated poppy.

An analysis of the link between agricultural assistance and poppy cultivation by region appears to confirm that villages that have not received assistance are more likely to cultivate opium poppy. However, in the southern region, 69 per cent of villages have cultivated opium poppy despite having received agricultural assistance. The corresponding figure for the north, north-east and west is approximately 30 per cent, while in the eastern and central regions none of the surveyed villages that received agricultural assistance went on to grow poppy.

Table 5: Agricultural assistance vis-à-vis opium poppy cultivation

Region	Agricultural assistance received	No. of villages		Total no. of villages surveyed	% of villages cultivating poppy despite having received agricultural assistance
		No opium poppy cultivation	Opium poppy cultivation		
Central	No	55	1	56	0%
	Yes	36		36	
East	No	33	5	38	0%
	Yes	24		24	
North-east	No	20	4	24	30%
	Yes	21	9	30	
North	No	58	6	64	26%
	Yes	14	5	19	
South	No	9	75	84	69%
	Yes	8	18	26	
West	No	31	20	51	29%
	Yes	12	5	17	

1.6. FIELD SECURITY

The security situation, as reported by respondents of the survey, was good in most provinces during the Opium Winter Rapid Assessment Survey. However, security was a general concern in most areas of Hilmand, Uruzgan, Kandahar, Ghazni, Khost, Paktika, Zabul, Kunar, Badghis, Nimroz and Farah. Since eradication had not begun in any part of Afghanistan by the time this survey was completed, it was not possible to assess the level of resistance among farmers to the eradication campaign.

The survey indicates that approximately 70 per cent of villages with poor security and 63 per cent of those with very poor security are involved in poppy cultivation, as compared to only 26 per cent of villages with good security. There is a strong link between security conditions and opium poppy cultivation in the southern and western provinces, where 100 per cent of villages with poor security have cultivated opium poppy. This percentage is also significantly high (44 per cent) for the eastern region.

Table 6: Security situation vis-à-vis opium poppy cultivation

Security situation	No. of villages		% villages cultivating opium poppy
	No opium poppy cultivation	Opium poppy cultivation	
Very poor	16	27	63%
Poor	21	48	70%
Good	181	62	26%
Very good	102	11	10%

1.7. ERADICATION

The Opium Winter Rapid Assessment Survey did not assess the implementation of the eradication campaign during the most recent cultivation season, but collected general information on eradication activities in those areas visited.

Of the 469 villages surveyed during the ORAS, 206 had planted opium poppy for the 2008 cultivation season. Of these 206 villages, 62 per cent had planted opium poppy in spite of eradication activities in 2007. Seventy-three per cent of villages where eradication measures had not been implemented had planted opium poppy for the coming season. This seems to indicate that the experience of eradication in 2007 was not a strong factor in influencing the decision at the village level whether or not to grow opium poppy in 2008.

The majority of respondents (60 per cent or more) from Day Kundi, Uruzgan, Hilmand, Zabul and Kandahar believed that eradication would not take place in their respective provinces, whereas some of the respondents in the western region (Badghis, Ghor, Farah and Nimroz) believed that it would. Respondents in the southern region believed that external forces/groups would protect their land from eradication, while respondents in the western region said that they themselves would protect their own land from eradication.

Table 7: Eradication in 2007 vis-à-vis opium poppy cultivation in 2008

Eradication in 2007	No. of villages		% of villages cultivating opium poppy
	No opium poppy cultivation	Opium poppy cultivation	
No	33	89	73%
Yes	32	52	62%

An awareness campaign to prevent poppy cultivation was conducted in many areas of Afghanistan in October and November 2007. Of the 183 surveyed villages targeted by the campaign, only 49 (27 per cent) have cultivated poppy, while almost 35 per cent of the 284 villages not included in the campaign have opted for poppy cultivation.

Table 8: Awareness campaign vis-à-vis opium poppy cultivation in 2008

Awareness campaign	No. of villages		% villages cultivating opium poppy after campaign
	No opium poppy cultivation	Opium poppy cultivation	
No	185	99	35%
Yes	134	49	27%

Regional results indicate that the awareness campaign has had some impact in the central and northern regions and mixed success in the western region. In the south, the campaign has had little impact: 80 per cent of villages cultivated poppy in spite of the campaign.

Table 9: Awareness campaign vis-à-vis opium poppy cultivation in 2008 (by region)

Region	Awareness campaign	No. of villages		% villages cultivating opium poppy after campaign
		No opium poppy cultivation	Opium poppy cultivation	
Central	No	84	1	1%
	Yes	7		0%
East	No	15	3	17%
	Yes	42	2	5%
North-east	No	28	1	3%
	Yes	13	12	48%
North	No	29	4	12%
	Yes	41	7	15%
South	No	11	69	86%
	Yes	6	24	80%
West	No	18	21	54%
	Yes	25	4	14%

1.8. PRICES

In addition to the monthly collection of price information for key provinces, the 2008 ORAS collected price information in all 469 villages surveyed. The average farm-gate prices of dry opium (as at the time of the survey) were in line with the monthly price report. An overview of dry opium prices by province shows that prices are higher in the southern, western and eastern provinces, while generally lower in the northern provinces. Farm-gate prices for dry opium were not available in the central region, since farmers did not have any dry opium stock..

The average dry opium price collected from traders was US\$113/kg in December 2007.

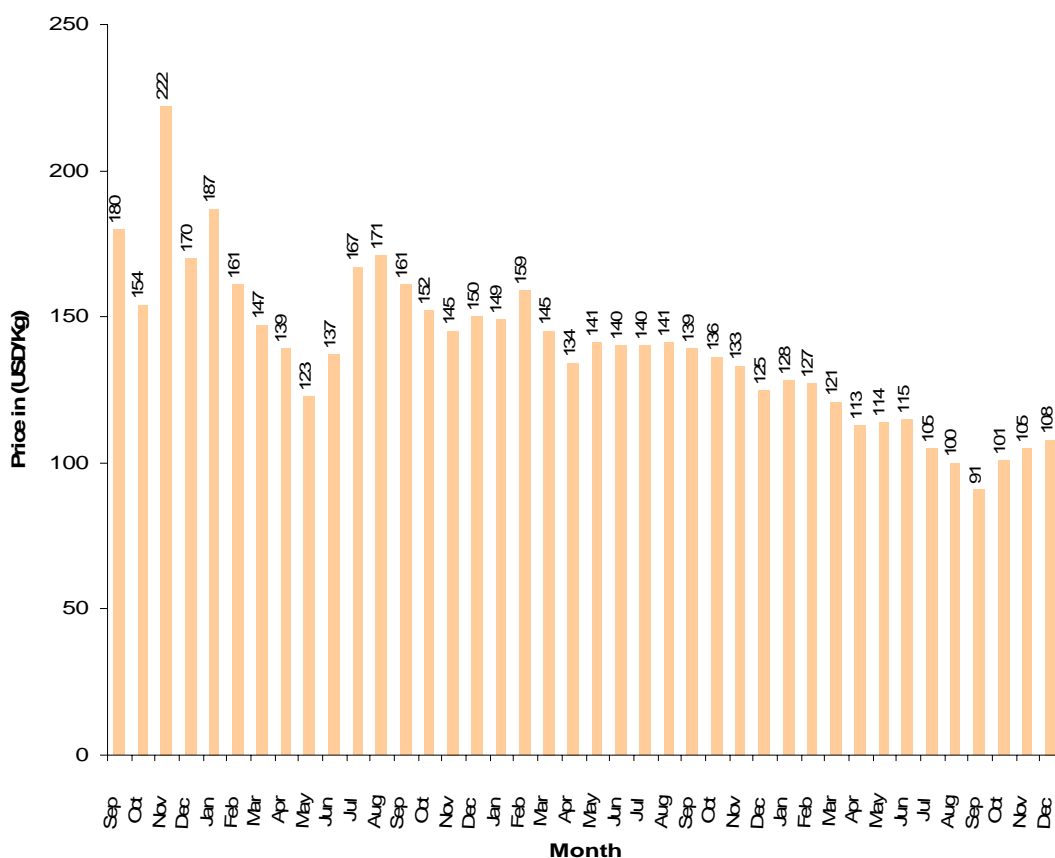
The average price for dry opium at the farm-gate level was US\$ 108/kg in December 2007. Opium prices normally drop during April and May of every year, which is peak harvest season of opium poppy. However, in 2007, opium prices touched rock bottom during month of September 2007. Average lowest opium prices were US\$ 123/kg and US\$ 125/kg in 2005 and 2006 respectively; however, the lowest price of opium in 2007 was US\$ 91/kg. The highest opium prices were US\$ 171/kg and US\$ 158/kg in 2005 and 2006 respectively; while the highest price of opium in 2007 was only US\$ 128/kg. Prices were much higher previous to 2005. This shows the decreasing trend of opium prices.

The average price for fresh opium at the farm-gate level was US\$ 82/kg, whereas average fresh opium price collected from traders was US\$ 91/kg in December 2007.

Fresh opium prices collected from traders and at farm-gate level also showed a decreasing trend after January 2007. Farm-gate prices fell from US\$ 121/kg in January 2007 to about US\$ 80/kg in December 2007. The average heroin price was US\$ 2,557/kg and average price for cannabis resin was US\$ 62/kg at the time of survey.

Farmers in Afghanistan usually cultivate crops twice a year in irrigated areas, typically growing maize, rice, vegetables or cotton following the opium poppy or wheat harvest. Some grow cannabis following the first harvest during the summer. None of Afghanistan's licit agricultural products can currently match per hectare income from opium poppy, which is estimated at US\$ 5,000.

Figure 1: Monthly farm-gate prices for dry opium, Sept. 2004 to Dec. 2007 (US\$/kg)



Source: UNODC Monthly Opium Price Report for Afghanistan, December 2007

1.9. CANNABIS CULTIVATION

A greater number of villages reported cannabis cultivation than in 2007: of the 469 villages surveyed for the 2008 ORAS, 18 per cent reported cannabis cultivation, whereas the corresponding figure in the 2007 ORAS was only 13 per cent. Cannabis cultivation was reported in Uruzgan (85 per cent of villages surveyed), Kandahar (71 per cent), Farah (56 per cent), Paktya (50 per cent), Zabul (47 per cent), Logar and Sari Pul (33 per cent), Hilmand (24 per cent), Nangarhar (24 per cent), Baghlan (23 per cent) and Balkh (22 per cent). Small-scale cultivation of cannabis was also reported in the Day Kundi, Nimroz, Badghis, Kabul and Hirat provinces.

According to the 2007 Afghanistan Annual Opium Survey, an estimated 70,000 ha of cannabis crops were cultivated in Afghanistan in 2007, compared to 50,000 ha in 2006. Data obtained from the field indicated an increase in cannabis cultivation in 2007, particularly in the southern provinces and in some areas of Balkh and Paktya. Cannabis cultivation in Afghanistan is expected to further increase in 2008.

1.10. OTHER FINDINGS

- *Poppy cultivation vis-à-vis cropping intensity:* During the ORAS, cropping intensity was assessed by asking farmers how many crops they cultivated on the same area of land over the course of the year. It was observed that of the 148 respondents who cultivated poppy, 59 per cent reported that they were able to cultivate two crops per year due to better access to irrigation. The remaining 41 per cent reported that they were unable to cultivate a second crop following the poppy harvest.
- *Taxes (usher) for poppy cultivation:* Respondents were asked whether they paid taxes to anti-Government elements. One hundred per cent of respondents in the southern region and 72 per cent of those in the western region replied that they indeed pay *usher* (tax) to several elements.

Respondents in the central, north and north-eastern regions reported that they did not pay such taxes. The majority of usher-paying farmers pay approximately 10 per cent of their income from opium poppy cultivation in taxes. These taxes are paid to one or more sources, such as district administrators, local commanders, mullahs, security commanders or anti-Government elements including the Taliban. The majority share goes to mullahs, the Taliban and local commanders.

- *Compensation by other farmers of losses due to eradication:* Respondents were asked if other farmers compensated the losses of farmers whose crops had been eradicated. It was observed that this practice is not common in the central, eastern and north-eastern regions, and negligible in the north, south and west.
- *Opium stocks:* Of the 469 villages visited, opium stocking was reported by village headmen in 74 villages. Of those 74, fifty-seven were reported in the southern region of Afghanistan. In that region, 52 per cent of the villages visited reported that they held opium stocks. The corresponding figures for the other regions were 11 per cent in the eastern region, 10 per cent in the western region and three per cent in the northern region. Villages visited in central and north-eastern Afghanistan did not report any opium stocks. An average of 55 kg of opium stock per village was reported in the 469 villages visited. In the south, the average opium stock per village was 226 kg, as reported by village headmen. Villages, which will grow opium poppy in 2008, reported more opium stocks than those that will not. UNODC will continue to collect information/data on opium stocks in Afghanistan in 2008.

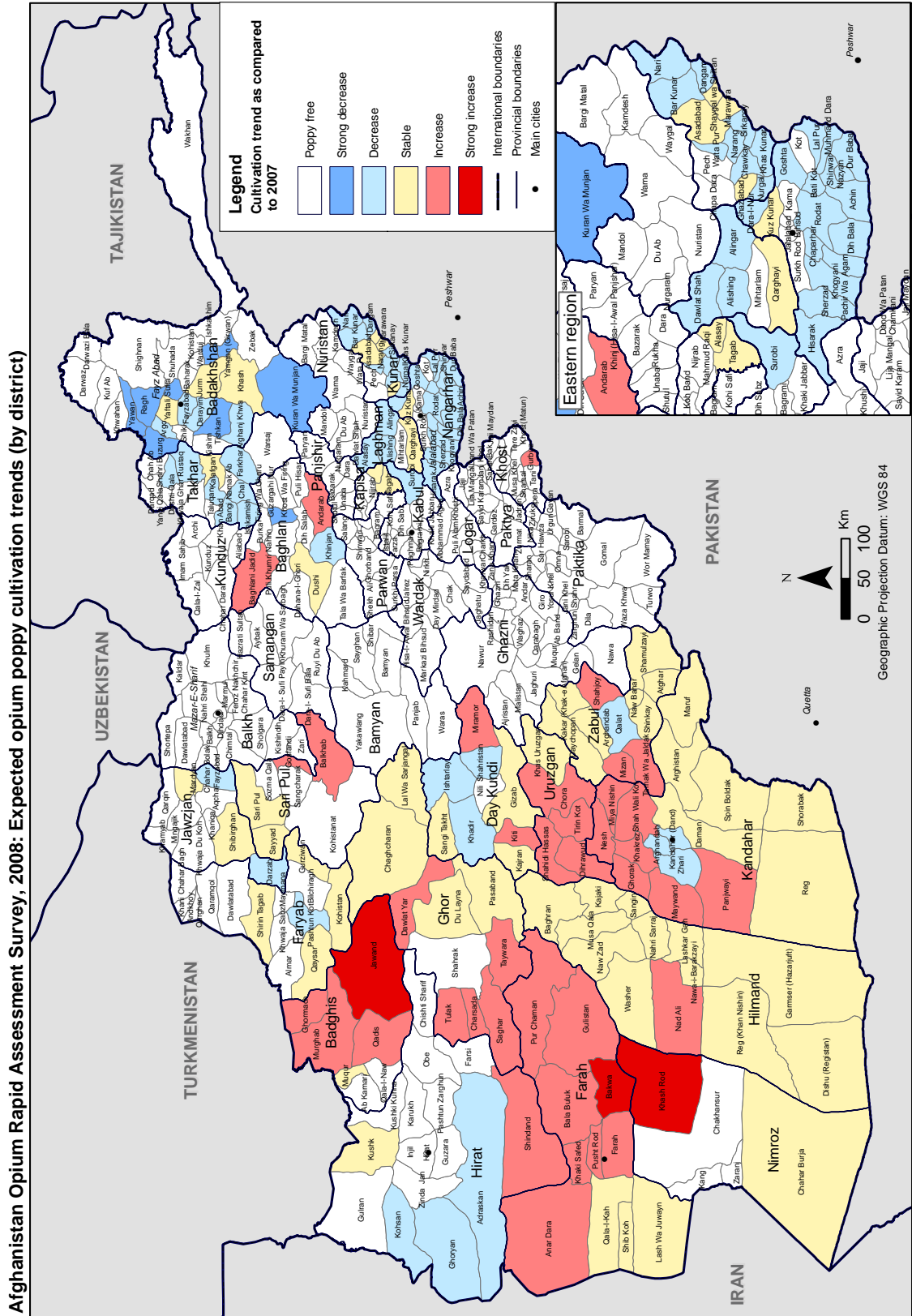
Table 10: Opium stocks in the villages visited during ORAS 2008

Region	Average opium stock per village (kg)	Poppy cultivation in 2008 (Yes/no)	Average opium stock per village (kg)
Central	0	No	0
		Yes	0
East	15	No	4
		Yes	146
North-east	0	No	0
		Yes	0
North	1	No	0
		Yes	6
South	226	No	3
		Yes	257
West	5	No	0
		Yes	13
Total	55		

- *Marketing of opium:* According to the reports of headmen in those villages visited, around 75 per cent of villages sell their opium in fresh form. Almost 60 per cent of farmers in the villages surveyed sell opium immediately after the harvest, while 40 per cent wait for some time after the harvest. Around 94 per cent of the farmers are paid in cash for the opium they sell.

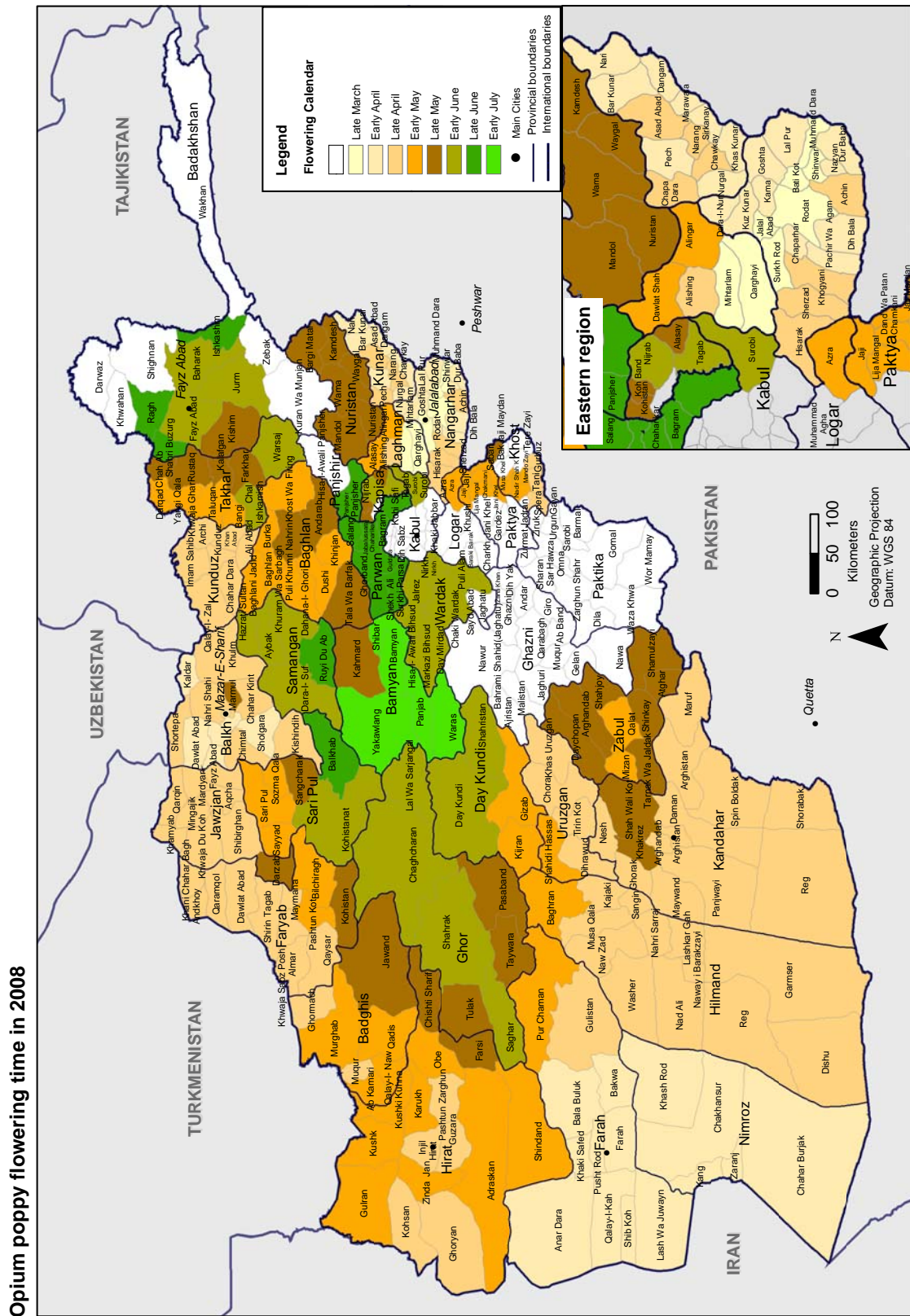
The above data/information (section 1.10) has been collected for the first time for the ORAS. UNODC will continue to collect the same information during the annual village survey that is scheduled to begin in March 2008. The annual village survey is carried out in approximately 1,500 villages, thus offering a better sampling size than ORAS.

Map 2: Expected opium poppy cultivation trends in 2008 (by district)



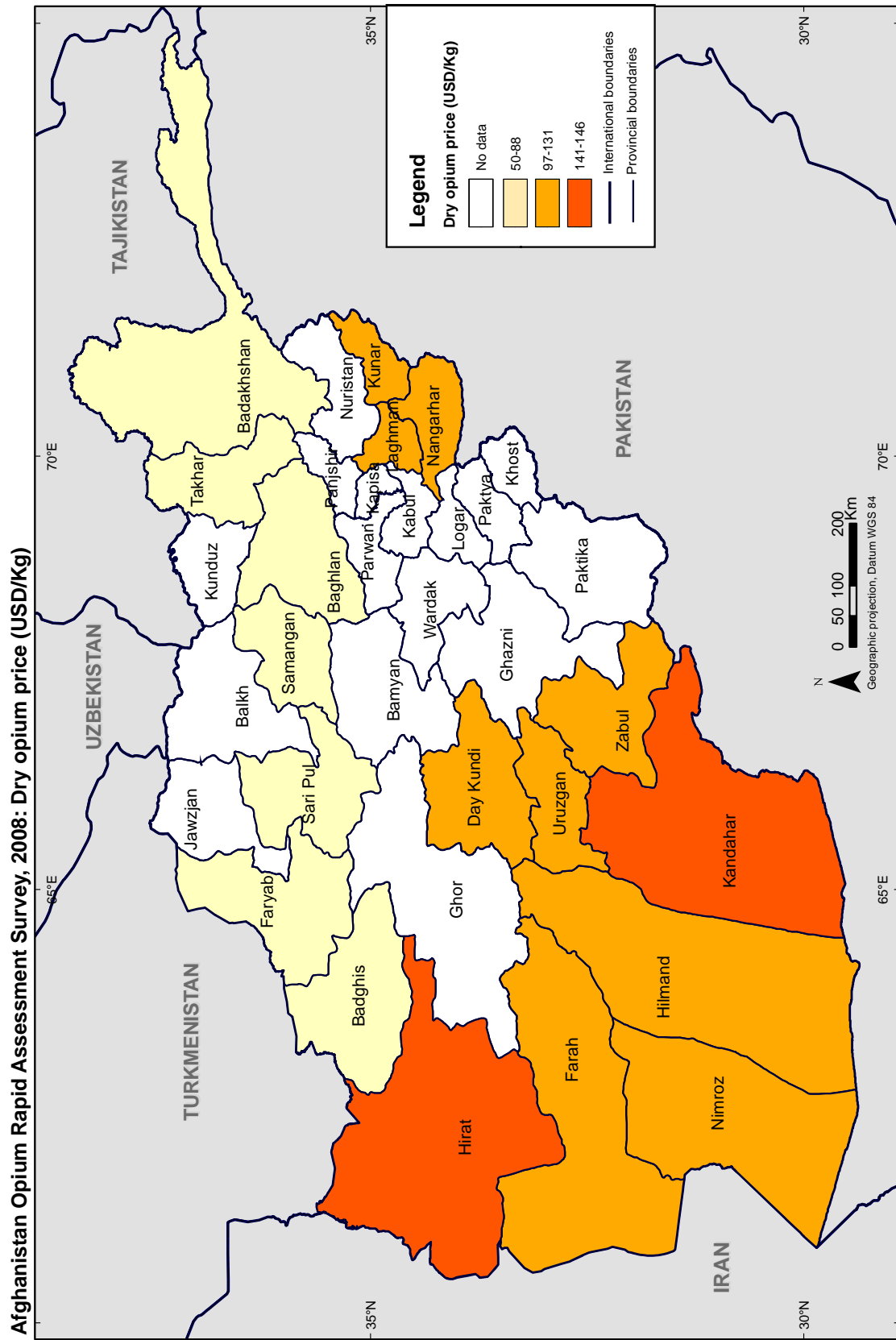
Source: MCN - UNODC Afghanistan Opium Rapid Assessment Survey, 2008 (http://www.unodc.org/uncda/en/crop_monitoring.html)
Note: The boundaries and names shown on this map do not imply official endorsement or acceptance by the United Nations.

Map 4: Expected opium poppy flowering time in 2008

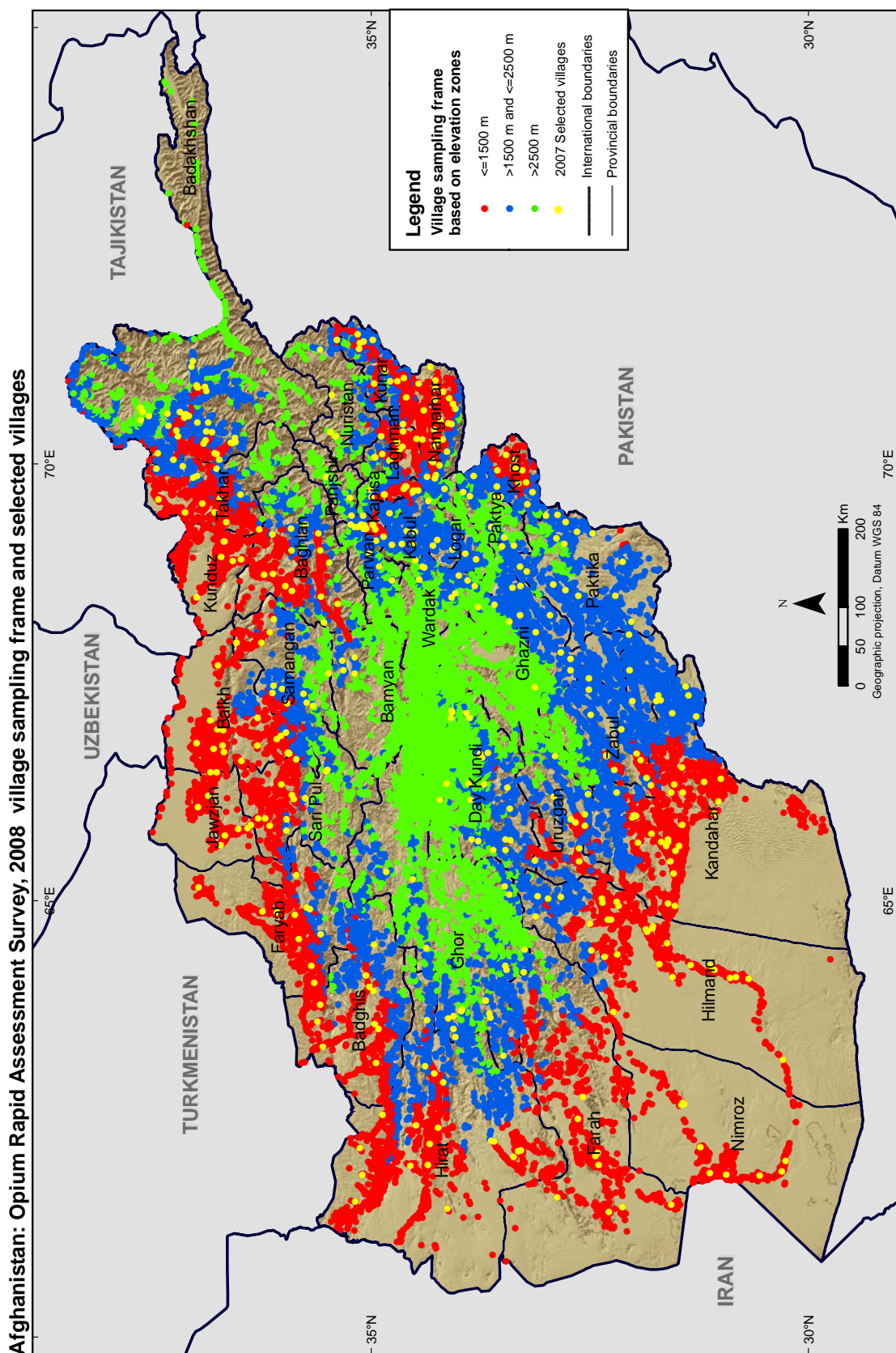


Source: Government of Afghanistan - National monitoring system implemented by UNODC
 Note: The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations.

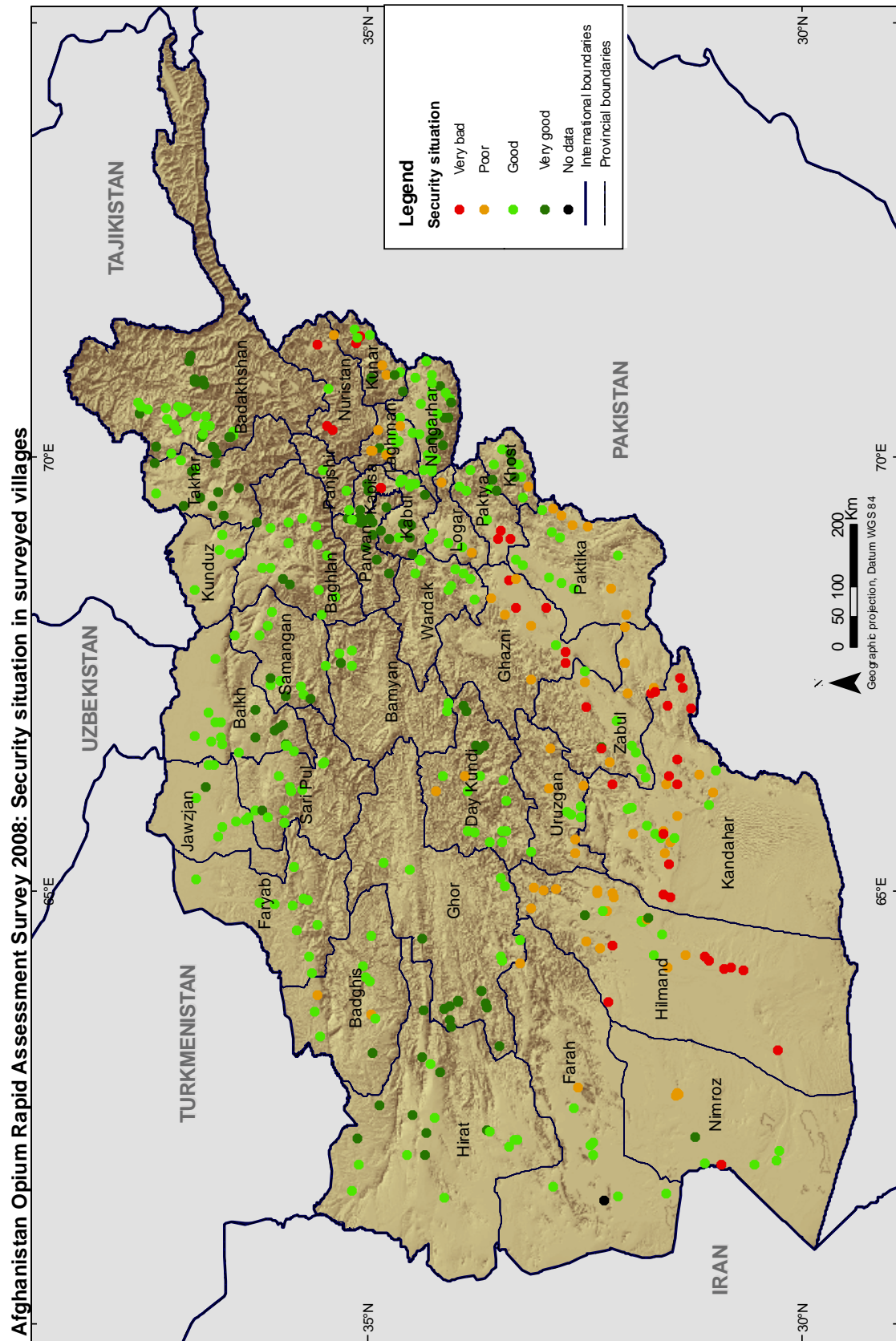
Map 6: Dry opium prices at the farm-gate (US\$/kg)



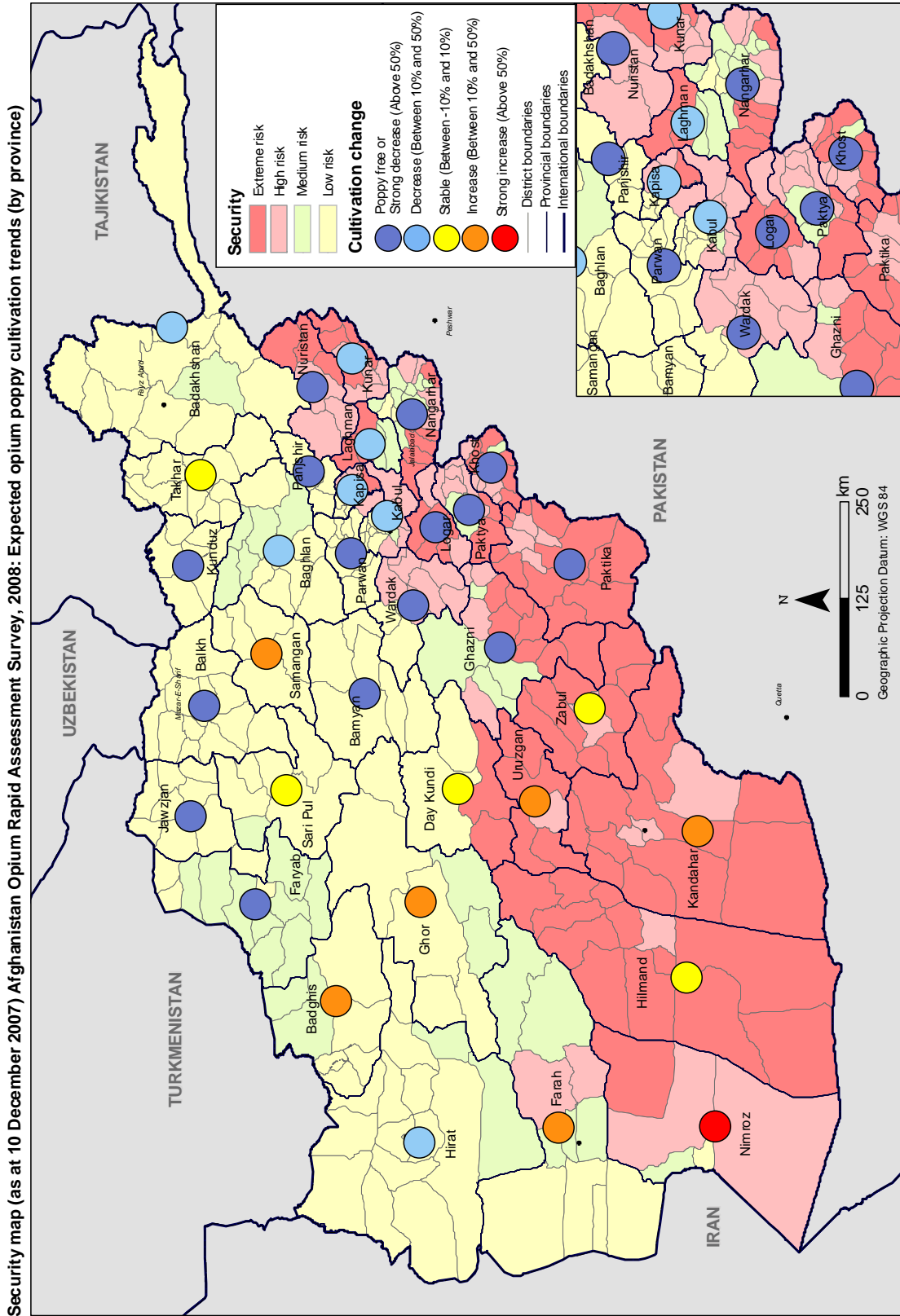
Map 7: Sampling frame and selected villages



Map 8: Security situation in surveyed villages (as reported by respondents)



Map 9: Expected cultivation trend vs. security situation (as reported by UNDSS)



2. Findings by province

NORTH-EASTERN REGION

BADAKHSHAN PROVINCE

Interviews with village headmen indicated that cultivation levels in 2008 may decrease as a result of effective information campaigns against poppy cultivation before the 2008 cultivation season and extensive eradication during the previous season. In 2007, opium poppy cultivation in Badakhshan decreased by 72 per cent. ORAS results indicate a decrease in cultivation in the main poppy cultivation areas, namely the Darayim and Argo valleys and the Faizabad, Jurm, Kishm and Baharak districts. However, this will depend on the level of cultivation during the coming spring.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	3,642
Type of cultivation	Irrigated and rain-fed
Projected trends in 2007-2008	Decrease
Cultivation level	Moderate
Planting time	Autumn/spring
Expected main harvest time	End of June
Security situation	Good
Dry opium price (US\$/kg)	81



Governor of Badakhshan addressing ORAS training programme for Surveyors



Opium poppy stocks captured by CN police in Badakhshan province

TAKHAR PROVINCE

Respondents in all districts reported no change in opium poppy cultivation in 2007. Takhar lies on a major trafficking route to Tajikistan (via the Chah Ab, Yangi Qala, Darqad and Rustaq districts).

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	1,211
Type of cultivation	Irrigated and rain-fed
Projected trends in 2007-2008	Stable
Cultivation level	Low
Planting time	Autumn/spring
Expected main harvest time	Mid-June
Security situation	Very good
Dry opium price (US\$/kg)	81

EASTERN REGION

NANGARHAR PROVINCE

Despite an increase of 285 per cent in opium poppy cultivation in Nangarhar province in 2007 as compared to 2006, a sharp decrease is expected in all main opium poppy-growing districts in 2008 as a result of the strong eradication effort in 2007 and an effective awareness campaign by the Government.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	18,739
Type of cultivation	Irrigated
Projected trends in 2007-2008	Strong decrease
Cultivation level	Low
Planting time	Autumn
Expected main harvest time	Mid-April
Security situation	Good
Dry opium price (US\$/kg)	117

KUNAR PROVINCE

Respondents indicated that the poppy cultivation level in Kunar would remain low in 2008. In 2007, cultivation decreased by 52 per cent compared to 2005. Bar Kunar, Dangam and Nari were the main cultivation areas in 2007.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	446
Type of cultivation	Irrigated and rain-fed
Projected trends in 2007-2008	Decrease
Cultivation level	Low
Planting time	Autumn
Expected main harvest time	Mid-April
Security situation	Poor
Dry opium price (US\$/kg)	106

LAGHMAN PROVINCE

Opium poppy cultivation in Laghman province is expected to decrease and remain at low levels in 2008. In 2007, Alishing and Qarghayi were the main poppy-cultivating districts, which may also show a decrease in cultivation in 2008.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	561
Type of cultivation	Irrigated and rain-fed
Projected trends in 2007-2008	Decrease
Cultivation level	Low
Planting time	Autumn
Expected main harvest time	Beginning of April
Security situation	Good
Dry opium price (US\$/kg)	110

NURISTAN PROVINCE

Nuristan province is expected to remain opium poppy-free in 2008, as in 2007. Nuristan is located at a high elevation, and most planting, if any, will begin in mid-March. The Du Ab and Nurgaram districts reported possible small-scale poppy cultivation in 2008.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	0
Type of cultivation	Irrigated and rain-fed
Projected trends in 2007-2008	Poppy-free
Cultivation level	Negligible
Planting time	Autumn
Expected main harvest time	Beginning of April
Security situation	Very poor
Dry opium price (US\$/kg)	N/A

NORTHERN REGION

BAGHLAN PROVINCE

Cultivation in Baghlan province decreased considerably in 2007 (by 76 per cent as compared to 2006), and may decrease further in 2008. Cultivation will remain at a low level.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	671
Type of cultivation	Irrigated and rain-fed
Projected trends in 2007-2008	Decrease
Cultivation level	Moderate
Planting time	Autumn/spring
Expected main harvest time	End of May to mid-June
Security situation	Very good
Dry opium price (US\$/kg)	70

BAMYAN PROVINCE

The majority of farmers in Bamyan province prefer not to cultivate opium poppy. Bamyan is therefore expected to maintain its poppy-free status in 2008.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	0
Type of cultivation	Irrigated and rain-fed
Projected trends in 2007-2008	Poppy-free
Cultivation level	Nil
Planting time	Spring
Expected main harvest time	Late July
Security situation	Very good
Dry opium price (US\$/kg)	N/A

BALKH PROVINCE

Opium poppy cultivation decreased sharply in Balkh province from 2005 to 2006, and the province became poppy-free in 2007. According to ORAS results, Balkh will remain poppy-free in 2008. This trend may be attributable to successful campaigns by the Government against poppy cultivation.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	0
Type of cultivation	Irrigated and rain-fed
Projected trends in 2007-2008	Poppy-free
Cultivation level	Nil
Planting time	Autumn
Expected main harvest time	End of April
Security situation	Very good
Dry opium price (US\$/kg)	N/A

FARYAB PROVINCE

Opium poppy cultivation was reported to increase from 2005 to 2006, remaining at a stable level in 2007. ORAS results suggest that cultivation in Faryab will decrease sharply in 2008; however, trends may remain stable in the Kohistan, Qaramqol, Qaysa, Qurghan and Shirin Tagab districts.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	2,866
Type of cultivation	Irrigated and rain-fed
Projected trends in 2007-2008	Strong decrease
Cultivation level	Moderate
Planting time	Autumn
Expected main harvest time	Mid-May
Security situation	Very good
Dry opium price (US\$/kg)	69

KUNDUZ PROVINCE

Kunduz province is neither a major nor a traditional opium poppy-growing region. In 2007, Kunduz was poppy-free; no change is expected in 2008.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	0
Type of cultivation	N/A
Projected trends in 2007-2008	Poppy-free
Cultivation level	Nil
Planting time	Autumn
Expected main harvest time	Mid-May
Security situation	Good
Dry opium price (US\$/kg)	N/A

JAWZJAN PROVINCE

Jawzjan province was not a significant opium poppy-growing area until 2002. From 2002 to 2006, however, cultivation increased sharply. In 2007, cultivation decreased by 46 per cent, and a further large decrease is expected in 2008.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	1,085
Type of cultivation	Irrigated and rain-fed
Projected trends in 2007-2008	Strong decrease
Cultivation level	Low
Planting time	Autumn and spring
Expected main harvest time	Late May
Security situation	Very good
Dry opium price (US\$/kg)	N/A

SAMANGAN PROVINCE

Samangan was poppy-free in 2008. Although small-scale opium poppy cultivation was observed during the ORAS, the province may remain poppy-free if eradication is carried out and no further cultivation takes place during the coming spring.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	0
Type of cultivation	Rain-fed and irrigated
Projected trends in 2007-2008	Increase
Cultivation level	Very low
Planting time	Spring
Expected main harvest time	End of July
Security situation	Very good
Dry opium price (US\$/kg)	50

SARI PUL PROVINCE

Opium poppy cultivation decreased dramatically in 2007, by 88 per cent compared to 2006. Little change is expected during 2008; however, this will depend on the extent of cultivation during late March.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	260
Type of cultivation	Irrigated and rain-fed
Projected trends in 2007-2008	Stable
Cultivation level	Very low
Planting time	Spring
Expected main harvest time	Late June
Security situation	Very good
Dry opium price (US\$/kg)	67

CENTRAL REGION

GHAZNI PROVINCE

Ghazni has been poppy-free since 2006. ORAS results suggest that the province may remain poppy-free in 2008.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	0
Type of cultivation	Irrigated
Projected trends in 2007-2008	Poppy-free
Cultivation level	Nil
Planting time	Spring
Expected main harvest time	Late July
Security situation	Very poor
Dry opium price (US\$/kg)	N/A

KHOST PROVINCE

In 2007, Khost was poppy-free. Although small-scale cultivation was observed during the ORAS, results suggest that Khost may remain poppy-free in 2008.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	0
Type of cultivation	Irrigated
Projected trends in 2007-2008	Poppy-free
Cultivation level	Nil
Planting time	Spring
Expected main harvest time	Late May
Security situation	Poor
Dry opium price (US\$/kg)	N/A

LOGAR PROVINCE

Most villages in Logar province do not cultivate opium poppy. This trend is not expected to change in 2008.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	0
Type of cultivation	N/A
Projected trends in 2007-2008	Poppy-free
Cultivation level	Nil
Planting time	Spring/autumn
Expected main harvest time	May/June
Security situation	Very good
Dry opium price (US\$/kg)	N/A

PAKTIKA PROVINCE

Paktika province has been poppy-free since 2006; the same trend is expected in 2008.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	0
Type of cultivation	N/A
Projected trends in 2007-2008	Poppy-free
Cultivation level	Nil
Planting time	Spring
Expected main harvest time	June
Security situation	Poor
Dry opium price (US\$/kg)	N/A

PAKTYA PROVINCE

Paktya province has been poppy-free since 2006; the same trend is expected in 2008.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	0
Type of cultivation	Irrigated
Projected trends in 2007-2008	Poppy-free
Cultivation level	Nil
Planting time	Spring
Expected main harvest time	June
Security situation	Good
Dry opium price (US\$/kg)	N/A

PARWAN PROVINCE

Parwan was poppy-free in 2007 and is expected to maintain the same status in 2008. Opium poppy cultivation was reported for the first time in the province in 2004 (1,310 ha). Cultivation was negligible in 2005, and only 124 ha of poppy were cultivated in 2006.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	0
Type of cultivation	Irrigated
Projected trends in 2007-2008	Poppy-free
Cultivation level	Nil
Planting time	Spring
Expected main harvest time	Late June
Security situation	Good
Dry opium price (US\$/kg)	N/A

KAPISA PROVINCE

Although Kapisa was not a major opium poppy-growing province until 2006, cultivation increased by 196 per cent in 2007. In 2008, cultivation may decrease somewhat.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	835
Type of cultivation	Irrigated
Projected trends in 2007-2008	Decrease
Cultivation level	Low
Planting time	Autumn/spring
Expected main harvest time	Late May/early July
Security situation	Good
Dry opium price (US\$/kg)	N/A

WARDAK PROVINCE

Wardak has been poppy-free since 2006, and is expected to remain so in 2008.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	0
Type of cultivation	Irrigated
Projected trends in 2007-2008	Poppy-free
Cultivation level	Nil
Planting time	Autumn/spring
Expected main harvest time	Late May/early July
Security situation	Poor
Dry opium price (US\$/kg)	N/A



Fields were under snow during ORAS in central zone

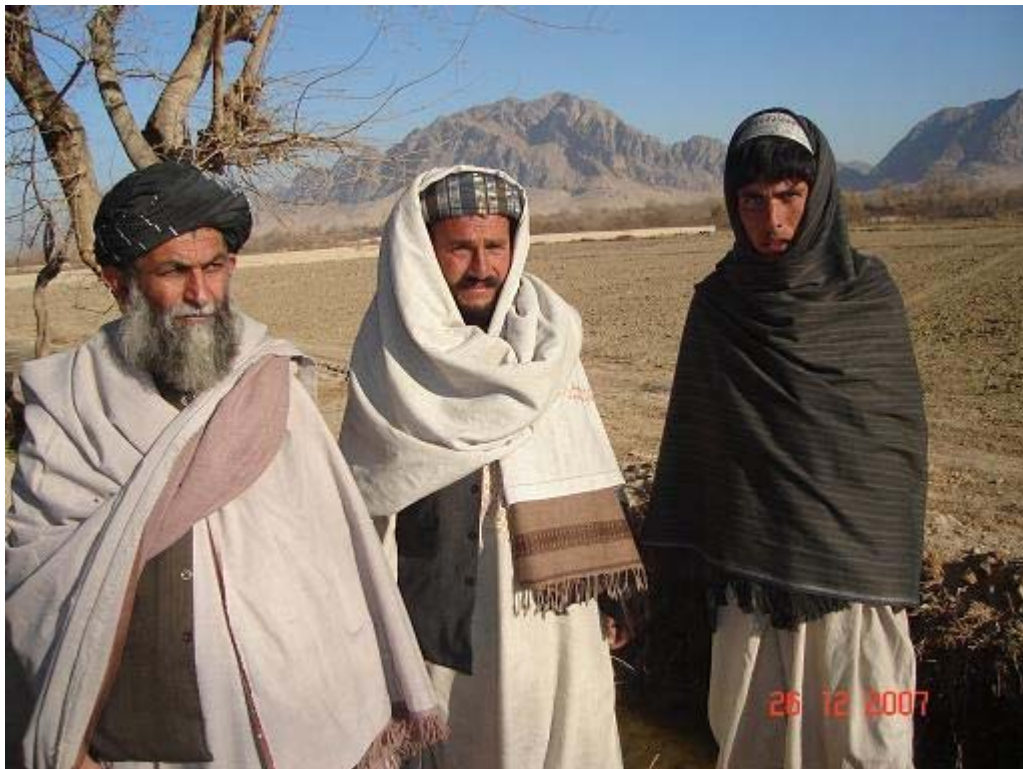
SOUTHERN REGION

KANDAHAR PROVINCE

Cultivation levels remained unchanged at around 12,500 ha in 2005 and 2006, but increased sharply in 2007 (by 32 percent). A further strong increase is expected in the Daman, Ghorak and Zhari districts in 2008. Cultivation in the Maruf and Maywand districts may also increase. Overall, opium poppy cultivation in Kandahar is expected to increase in 2008.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	16,615
Type of cultivation	Irrigated
Projected trends in 2007-2008	Increase
Cultivation level	Very high
Planting time	Autumn
Expected main harvest time	Beginning of May
Security situation	Poor
Dry opium price (US\$/kg)	146



Poppy farmers in Kandahar province during ORAS interview

HILMAND PROVINCE

A steep increase in opium poppy cultivation was observed in Hilmand in 2006, followed by a further sharp increase (48 per cent) in 2007, as a result of which Hilmand accounted for 52 per cent of total opium poppy cultivation in Afghanistan in 2007. ORAS results indicate that cultivation will remain stable in 2008. Hilmand is also the most important province in terms of heroin processing and trafficking.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	102,770
Type of cultivation	Irrigated
Projected trends in 2007-2008	Stable
Cultivation level	Very high
Planting time	Autumn
Expected main harvest time	Beginning of May
Security situation	Very poor
Dry opium price (US\$/kg)	119

All of the villages in Hilmand that were visited during the ORAS reported poppy cultivation in 2008.

URUZGAN PROVINCE

Uruzgan is one of Afghanistan's major traditional opium poppy-growing provinces. Cultivation increased from 4,605 ha in 2005 to 9,703 ha in 2006, but remained stable at 9,204 ha in 2007. ORAS results indicate that there may be an increase in opium poppy cultivation in 2008.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	9,204
Type of cultivation	Irrigated
Projected trends in 2007-2008	Increase
Cultivation level	Very high
Planting time	Autumn
Expected main harvest time	Mid-May
Security situation	Very poor
Dry opium price (US\$/kg)	102

ZABUL PROVINCE

The ORAS predicts no change in opium poppy cultivation in Zabul province in 2008. In 2007, poppy cultivation in the province decreased by 50 per cent, which interrupted an increasing trend observed since 2005. Zabul province is one of the poorest areas of Afghanistan, and a high level of migration from the province to other areas of Afghanistan is reported.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	1,611
Type of cultivation	Irrigated
Projected trends in 2007-2008	Stable
Cultivation level	Moderate
Planting time	Autumn
Expected main harvest time	Mid-May
Security situation	Very poor
Dry opium price (US\$/kg)	117

WESTERN REGION

HIRAT PROVINCE

Hirat was not a major opium poppy-growing province until 2003, but from 2003 to 2006, around 2,000 ha of opium poppy was cultivated each year. Cultivation decreased by 33 percent in 2007 and is expected to decrease further in 2008.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	1,525
Type of cultivation	Irrigated
Projected trends in 2007-2008	Decrease
Cultivation level	Moderate
Planting time	Autumn/spring
Expected main harvest time	Late May/late June
Security situation	Very good
Dry opium price (US\$/kg)	141

FARAH PROVINCE

Opium poppy has been cultivated in all districts of Farah province since 2004. Cultivation in the province decreased sharply from 2005 to 2006, but increased in 2007 to a record level of 14,865 ha (an increase of 92 per cent). Respondents expect a further increase in 2008. A strong increase in cultivation has been observed in the districts of Bakwa, Bala Buluk, Farah, Khaki Safed, Pur Chaman and Pusht Rod in particular.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	14,865
Type of cultivation	Irrigated
Projected trends in 2007-2008	Increase
Cultivation level	Very high
Planting time	Autumn
Expected main harvest time	Early May
Security situation	Poor
Dry opium price (US\$/kg)	131

NIMROZ PROVINCE

Cultivation is expected to show a strong increase in 2008, particularly in the Khash Rod district. The year 2005 was marked by a record increase in cultivation from 115 ha to 1,690 ha, and a further increase was observed in 2006. Cultivation level has increased by a record 233 per cent in 2007. Nimroz lies at the border with Iran and Pakistan, and is therefore one of the major trafficking provinces for the export of Afghan opium.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	6,507
Type of cultivation	Irrigated
Projected trends in 2007-2008	Strong increase
Cultivation level	Very high
Planting time	Autumn
Expected main harvest time	Mid-April
Security situation	Good
Dry opium price (US\$/kg)	129

GHOR PROVINCE

ORAS results indicate an increase in cultivation in Ghor province. Agriculture in Ghor is limited to very narrow valleys, on account of the province's difficult terrain and harsh weather conditions. Ghor is one of the main opium-trafficking provinces.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	1,503
Type of cultivation	Irrigated
Projected trends in 2007-2008	Increase
Cultivation level	Moderate
Planting time	Spring
Expected main harvest time	Late June
Security situation	Very poor
Dry opium price (US\$/kg)	N/A

BADGHIS PROVINCE

ORAS results suggest an increase in poppy cultivation in 2008. Cultivation levels have risen since 2005, following a dramatic increase from 152 ha in 2002 to 4,219 ha in 2007.

Opium poppy cultivation details:

Cultivation in 2007 (hectares)	4,219
Type of cultivation	Irrigated and rain-fed
Projected trends in 2007-2008	Increase
Cultivation level	High
Planting time	Spring
Expected main harvest time	Mid-June
Security situation	Very poor
Dry opium price (US\$/kg)	88



ORAS training in the western region

3. METHODOLOGY

The Opium Rapid Assessment Survey, including training and deployment, was conducted from 10 December 2007 to 14 January 2008 by 82 local field surveyors. It was jointly supervised by the Ministry of Counter-Narcotics (MCN) and UNODC. 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.

Sampling framework

The surveyors conducted structured interviews with the headmen of selected villages in all provinces. A total of 469 villages in 265 districts were surveyed across all provinces.

Opium poppy cultivation is most successful at altitudes below 1,500 m, where it is significantly more widespread than in areas of higher elevation; opium poppy cultivation above 2,500 m is comparatively rare. In view of the uneven distribution of opium poppy cultivation at different elevations, a stratified sampling method was used to select the sample villages. The villages in the sampling frame were divided into three groups (strata) according to their elevation:

Group 1: Villages located at an elevation of less than 1,500 m

Group 2: Villages located at elevations between 1,500 m and 2,500 m

Group 3: Villages located at an elevation of more than 2,500 m

Villages were selected from each group using a systematic random selection technique. The total sampling ratio was 1.5 per cent. The design and size of the sample facilitate 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 poppy cultivation trends and the security situation throughout the province.

Surveyor training

Until 2006, all surveyors were provided with ORAS training in Kabul. For the 2007 and 2008 ORAS, and as part of a capacity-building exercise for national staff, survey coordinators, coordinators of individual provinces and regional survey assistants were trained in Kabul over a four-day period. They in turn trained surveyors in their respective regions. The extension of survey training sessions to the regional level is one of the milestones that have been reached in building national capacity to conduct opium poppy surveys. Training in all regions was supervised by technical staff from ICMP, Kabul.

During the training period, a total of 82 surveyors and nine survey coordinators were trained in the use of the survey form and survey techniques by local UNODC staff in the southern, central, eastern, western, north-eastern and northern regions.

Data collection

Opium poppy cultivation is illegal in Afghanistan, and is considered to be forbidden under Islam. Given the sensitive nature of the issue, data collection is difficult and can be dangerous. Surveyors are selected from different regions of Afghanistan through a very careful selection process. UNODC and MCN regional offices and coordinators recruit surveyors according to survey specifications and the surveyors' skills. Most of the surveyors selected already have experience in conducting UNODC surveys.

Surveyors were trained in techniques for approaching local community members and conducting interviews. Following intensive theoretical and practical training, they were deployed to the field,

where they interviewed headmen of villages and conducted other survey-related activities. UNODC and MCN coordinators monitored data quality and the progress of the survey closely. Fortunately, the surveyors did not encounter any security problems.



ORAS training in Balkh province



Farmers interview in central region

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, inter alia, of various factors thought to influence opium poppy cultivation; the security situation; pressure from the Government concerning survey reports; 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 poppy cultivation; corruption, and; levels of opium poppy and cannabis cultivation. Debriefing facilitates a greater understanding of opium poppy cultivation and the socio-political and other factors that determine cultivation trends, and provides useful guidance in analysing survey data.