



UNODC

United Nations Office on Drugs and Crime



Government of Afghanistan
Ministry of Counter Narcotics



Afghanistan

Opium Survey 2012

**Opium Risk Assessment
for all Regions**

(Phase 1&2)

April 2012

ABBREVIATIONS

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

ACKNOWLEDGEMENTS

The following organizations and individuals contributed to the implementation of the 2012 Afghanistan Opium Winter Risk Assessment Survey and to the preparation of this report:

Ministry of Counter-Narcotics:

Mohammad Ibrahim Azhar (Deputy Minister), Mir Abdullah (Director of Survey and Monitoring Directorate), Saraj Ahmad (Deputy Director of Survey and Monitoring Directorate).

Survey Coordinators: Eshaq Masumi (Central Region), Abdul Mateen (Eastern Region), Abdul Latif Ehsan (Western Region), Fida Mohammad (Northern Region), Mohammed Ishaq Anderabi (North-Eastern Region), Khalil Ahmad (Southern Region), Khiali Jan Mangal (Eradication Verification Reporter), Sayed Najibullah Ahmadi (Economic specialist), Mohammad Sadiq Rizaee (Remote Sensing), Shiraz Khan Hadawe (GIS & Remote Sensing Analyst), Mohammad Ajmal (Database Officer), Sahar (Data entry), Mohammad Hakim Hayat (Data entry).

United Nations Office on Drugs and Crime (Kabul)

Jean-Luc Lemahieu (Country Representative), Ashita Mittal (Deputy Representative, Programme), Devashish Dhar (International Project Coordinator), Ziauddin Zaki (National Project Coordinator), Abdul Mannan Ahmadzai (Survey Officer), Noor Mohammad Sadiq (Database Developer)

Remote sensing analysts: Ahmad Jawid Ghiasee and Sayed Sadat Mehdi

Eradication reporters: Ramin Sobhi and Zia Ulhaq

Survey Coordinators: Abdul Basir Basiret (Eastern Region), Sayed Ahmad (Southern Region), Fawad Ahmad Alaie (Western Region), Mohammad Rafi (North-eastern Region), Rahimullah Omar (Central Region),

Provincial Coordinators: Fazal Mohammad Fazli (Southern Region), Mohammad Alam Ghalib Eastern Region), Altaf Hussain Joya (Western Region), Lutfurhaman Lutfi (Northern Region).

United Nations Office on Drugs and Crime (Vienna)

Sandeep Chawla (Director, Division for Policy Analysis and Public Affairs), Angela Me (Chief, Statistics and Surveys Section-SASS), Martin Raithelhuber (Programme Officer), Philip Davis (Statistician), Coen Bussink (GIS & Remote Sensing Expert), Irmgard Zeiler (Research Expert) (all SASS), Suzanne Kunnen (Public Information Assistant, Studies and Threat Analysis Section).

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

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

TABLE OF CONTENTS

1 GENERAL FINDINGS.....	2
1.1. DRIVING FORCES BEHIND OPIUM CULTIVATION TRENDS	8
1.2. CASH ADVANCES RECEIVED FOR OPIUM CULTIVATION	9
1.3. AGRICULTURAL ASSISTANCE	10
1.4. FIELD SECURITY DURING ORAS IMPLEMENTATION	10
1.5. AWARENESS AND ERADICATION EXPERIENCE	11
1.6. PRICES	12
2 FINDINGS BY PROVINCE	15
2.1 NORTH-EASTERN REGION	15
<i>BADAKHSHAN PROVINCE</i>	15
<i>TAKHAR PROVINCE</i>	15
<i>KUNDUZ PROVINCE</i>	15
2.2 NORTHERN REGION	16
<i>BAGHLAN PROVINCE</i>	16
<i>BAMYAN PROVINCE</i>	16
<i>BALKH PROVINCE</i>	16
<i>FARYAB PROVINCE</i>	16
<i>JAWZJAN PROVINCE</i>	17
<i>SAMANGAN PROVINCE</i>	17
<i>SARI PUL PROVINCE</i>	18
3 METHODOLOGY.....	28

Maps

Map 1 Expected opium cultivation trends in 2012 (by province)	4
Map 2: Expected opium cultivation level in 2012 (by province)	5
Map 3 Regional grouping of provinces for opium surveys in Afghanistan	6
Map 4 Dry opium prices March 2012 (US\$/kg)	14
Map 5 Sampling frame and selected villages for the Winter Assessment 2012 (Phase 1 and 2)	27

EXECUTIVE SUMMARY

In 2012, the Opium Risk Assessment is carried out in two phases similar to last year. The first phase was carried out in December 2011 and January 2012 and covered the Central, Eastern, Southern and Western region, where opium is sown in fall 2011.

The second phase took place in February-March 2012 and covered the Northern and North-eastern regions, where opium poppy is cultivated in spring. This report presents the findings of both phases.

The result of this assessment in the Phase-1 regions indicates that the largest opium cultivating provinces, Hilmand and Kandahar, are not likely to see an increase in cultivation despite the current high price of opium. In Hilmand, no major changes in the level of opium cultivation are expected and in Kandahar, opium cultivation is expected to decrease in 2012. The reasons for this development were multiple and differed from area to area. In parts of Hilmand and Kandahar the main dominant reason for declining in poppy cultivation is due to improvement in the security situation, campaign by the government, fear of eradication and agriculture assistance particularly within the Hilmand food zone.

In the western provinces namely Farah, Hirat Ghor and Nimroz, poppy cultivation is expected to increase. Similar increasing trends were reported in eastern region namely Nangarhar, Kunar and Kapisa. However, these provinces would still remain at much lower level of cultivation as compared to Hilmand and Kandahar. The increase in poppy cultivation in Ghor province may lead to the loss of its poppy-free status if poppy eradication is not implemented in time. The remaining provinces in the central and eastern regions, which were poppy-free in 2011, are expected to remain so in 2012.

The result in the Phase-2 Regions indicates that the largest cultivating province in the north-east, Badakhshan is likely to see an increase in opium cultivation this year. The status of opium cultivation in Takhar remains unpredictable due to large part of the province covered with snow during the survey. There would be no major changes expected in opium cultivation in Faryab and Baghlan provinces in the Northern region. These two provinces lost their poppy-free status last year after two years. The remaining provinces in the northern region would remain poppy-free this year as well.

Confirming the findings of the 2011 Afghanistan Opium Survey, the Risk Assessment of this year indicated the strong association between insecurity, lack of agricultural assistance and opium cultivation. Villages with a low level of security and which had not received agricultural assistance in the previous year were significantly more likely to grow poppy in 2012 than villages with good security and those, which had received assistance. Similarly, villages which had been targeted by an anti-poppy awareness campaign were significantly less likely to grow poppy in 2012.

The findings of the Risk Assessment in the Southern region are encouraging. A combination of events seemed to have contributed to this development. Efforts directed against poppy cultivation, increasing government control as well as licit alternatives to poppy may have played a role in preventing farmers from resuming poppy cultivation in the two major poppy growing provinces Hilmand and Kandahar despite the fact that high opium prices provide a strong incentive. However, due attention is required for province like Ghor, which could loose its poppy-free status. Faryab and Baghlan can be poppy free if effective eradication is implemented. The increasing cultivation trends in the Western Eastern and North-eastern regions would also need attention, especially in Nangarhar and Badakhshan provinces, which, in the past, has shown its potential to be major poppy cultivating provinces.

1 GENERAL FINDINGS

Similar to 2011, the 2012 Opium Risk Assessment has been carried out in two phases. In the first phase, the southern, western, central and the eastern regions were surveyed in December. The Northern and the North-eastern regions were covered during February-March 2012 since the sowing starts later in these regions. This was done to facilitate an early assessment of the major opium cultivating provinces. The sampling frame was stratified based on risk areas and the number of villages surveyed was increased to have better understanding of the trends. Still, the Opium Risk Assessment is based on a relatively small sample of villages and qualitative in nature. It is meant to provide an early, qualitative indication of cultivation trends and may not capture minor proportional or absolute changes in poppy cultivation. The assessment provides information on the risk that a certain development will take place based on the information available at that point in time. It is not meant to predict the level of area under opium cultivation at harvest time, which is also influenced by (at the time of the survey) unknown factors such as climatic conditions (frost, drought) and eradication activities taking place later in the growing season.

The results of the qualitative assessment by province are the following:

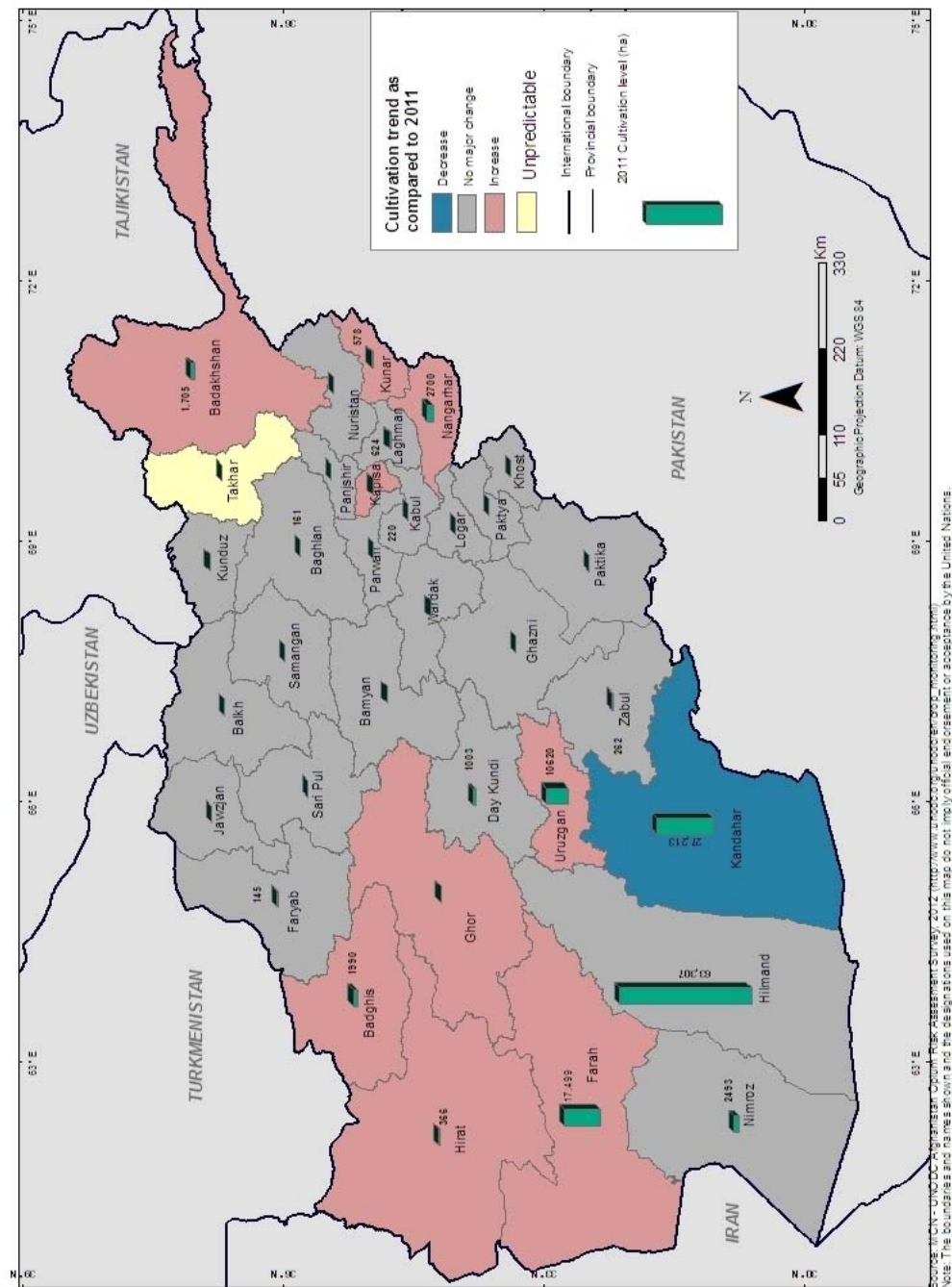
- A decrease in opium cultivation is expected in Kandahar province.
- No major changes in opium cultivation are expected in Hilmand province.
- No major changes in opium cultivation are expected in Faryab, Baghlan, Kabul, Laghman, Nimroz, Day Kundi and Zabul provinces. Faryab and Baghlan provinces lost their poppy-free status last year after two years and are likely to remain same in 2012 unless eradication is implemented on time.
- Six provinces, Badghis, Farah, Kunar, Nangarhar, Uruzgan and Badakhshan are likely to show an increase in opium cultivation.
- Increases in opium cultivation are also expected in Ghor, Hirat and Kapisa provinces. Ghor which was poppy-free in 2011 may not remain so in 2012 unless timely eradication is implemented.
- The opium cultivation status remains unpredictable in Takhar province due to large part of the province covered with snow at the time of survey.
- Fifteen provinces, Ghazni, Khost, Logar, Paktika, Paktya, Panjshir, Parwan, Wardak, Nuristan, Balkh, Bamyan, Jawzjan, Samangan, Sari Pul and Kunduz which were poppy-free in 2011, are likely to remain so in 2012.

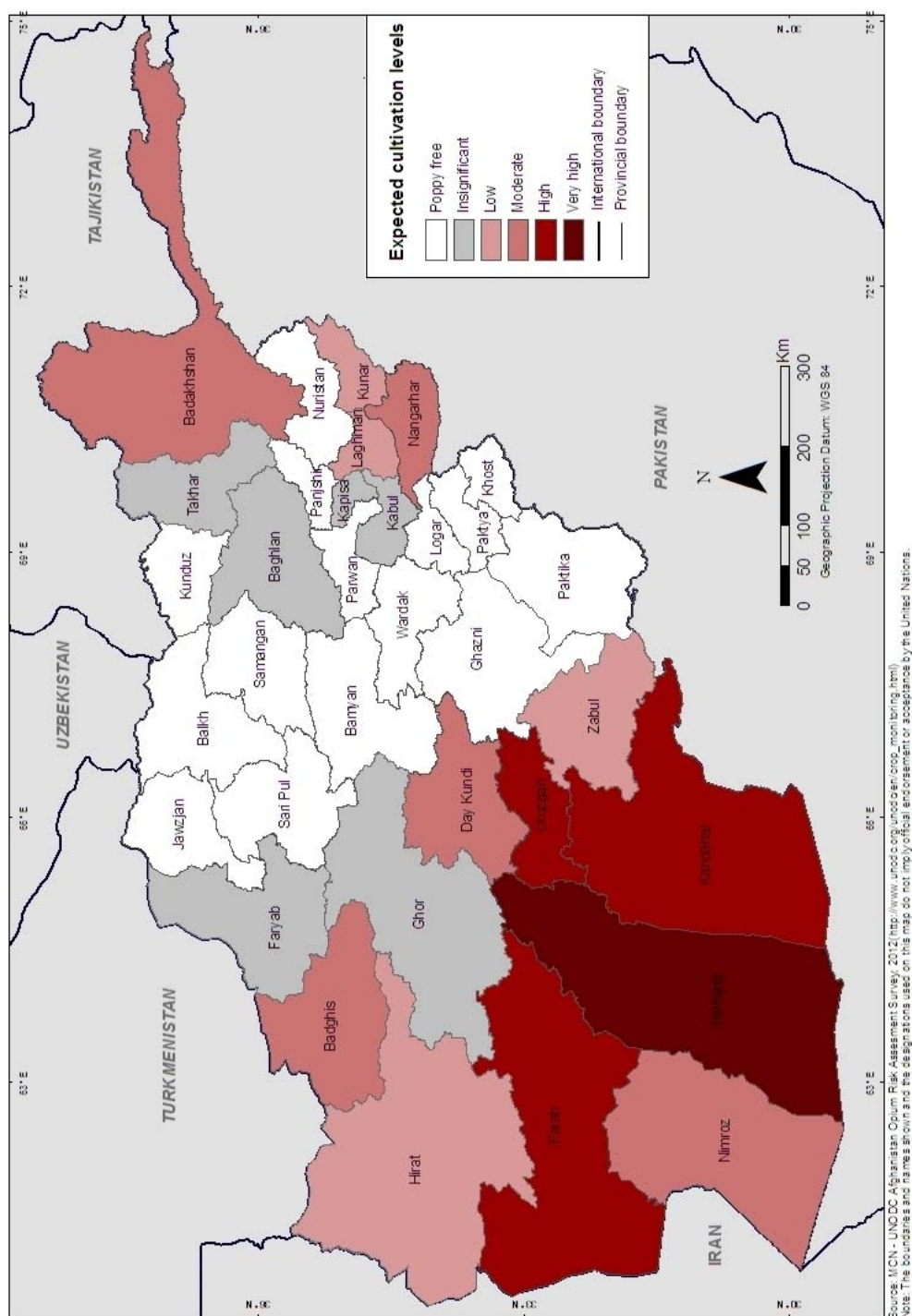
The provinces which are likely to see an increase would still remain considerably below the cultivation levels of Hilmand and Kandahar. Timely eradication measures in provinces with very low levels of opium cultivation such as Kabul, Hirat, Kapisa, Faryab and Baghlan could lead to achieving poppy-free status.

Table 1: Expected opium cultivation trends in 2012 at a glance (Phase 1&2)

Cultivation trend in 2012	No. of provinces	Provinces	Comments
Poppy free	15	Ghazni, Khost, Logar, Paktika, Paktya, Panjshir, Parwan, Wardak, Nuristan, Balkh, Bamyan, Jawzjan, Samangan, Saripul and Kunduz	These provinces were poppy free in 2011 as well.
No major change	8	Hilmand, Daykundi, Zabul, Nimroz, Kabul, Laghman, Faryab and Baghlan	Last year the poppy cultivation had slightly decreased compared to 2010 in Hilmand, Daykundi, Zabul and increased in Nimroz, Kabul, Laghman, Faryab and Baghlan. Faryab and Baghlan lost its poppy-free status in 2011.
Decrease	1	Kandahar	Last year the poppy cultivation had increased in Kandahar
Increase	9	Badakhshan, Baghis, Farah, Uruzgan, Kunar, Nangarhar, Ghor, Hirat and Kapisa	Last year the poppy cultivation had increased in Farah, Uruzgan, Kunar and Nangarhar provinces compared to 2010. Ghor remained poppy free in 2011 and could be poppy free if effective eradication is implemented
Unpredictable	1	Takhar	Takhar remained poppy-free in 2011. The assessment of the opium cultivation trend was difficult due to snow cover during survey.

Map 1 Expected opium cultivation trends in 2012 (by province)





Map 3 Regional grouping of provinces for opium surveys in Afghanistan

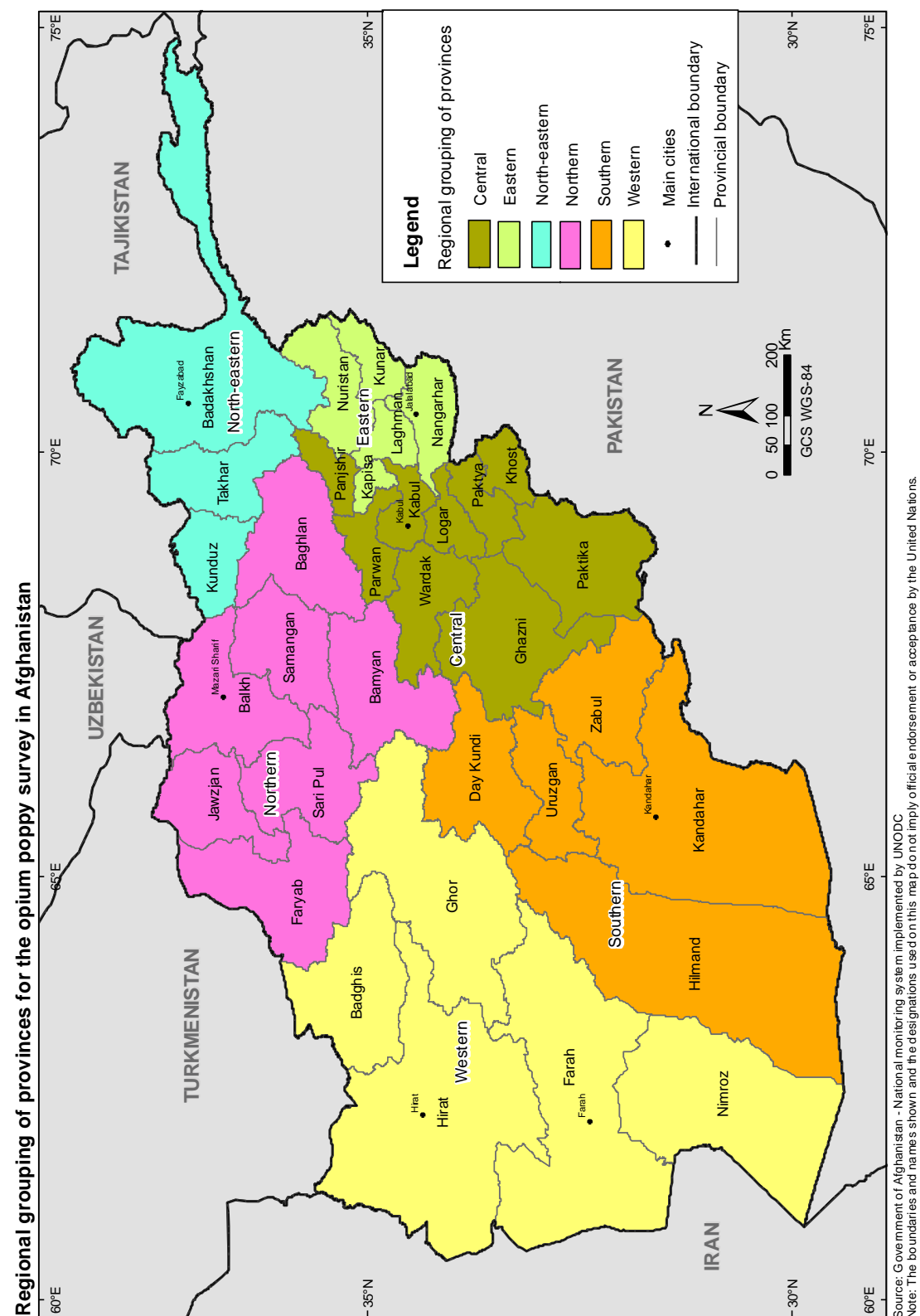


Table 2: Expected opium cultivation trends in 2012 (by province, results of Phase 1 & 2)

Phase	Region	Province	Cultivation 2011 (ha)	2012Expected opium cultivation change	Expected opium cultivation level
Phase-1	Central	Ghazni	Poppy free	No major change	Poppy free
		Kabul	220	No major change	Insignificant
		Khost	Poppy free	No major change	Poppy free
		Logar	Poppy free	No major change	Poppy free
		Paktika	Poppy free	No major change	Poppy free
		Paktya	Poppy free	No major change	Poppy free
		Panjshir	Poppy free	No major change	Poppy free
		Parwan	Poppy free	No major change	Poppy free
		Wardak	Poppy free	No major change	Poppy free
	Eastern	Kapisa	181	Increase	Insignificant
		Kunar	578	Increase	Low
		Laghman	624	No major change	Low
		Nangarhar	2,700	Increase	Moderate
		Nuristan	Poppy free	No major change	Poppy free
	Southern	Day kundi	1,003	No major change	Moderate
		Hilmand	63,307	No major change	Very high
		Kandahar	27,213	Decrease	High
		Uruzgan	10,620	Increase	High
		Zabul	262	No major change	Low
	Western	Badghis	1,990	Increase	Moderate
		Farah	17,499	Increase	High
		Ghor	Poppy free	Increase	Insignificant (Not poppy free)
		Hirat	366	Increase	Low
		Nimroz	2,493	No major change	Moderate
Phase-2	North	Balkh	Poppy free	No major change	Poppy free
		Baghlan	161	No major change	Insignificant
		Bamyan	Poppy free	No major change	Poppy free
		Faryab	145	No major change	Insignificant
		Jawzjan	Poppy free	No major change	Poppy free
		Samangan	Poppy free	No major change	Poppy free
		Sari Pul	Poppy free	No major change	Poppy free
	North-east	Badakhshan	1,705	Increase	Moderate
		Kunduz	Poppy free	No major change	Poppy free
		Takhar	Poppy free	Unpredictable	Insignificant

Trends by region

- **Southern region:** Poppy cultivation in Hilmand, the main opium cultivating province in the country, is not expected to have major changes. Kandahar province is likely to have a decrease in opium cultivation. An increase in opium cultivation is expected in Uruzgan province. No major changes are expected in Zabul and Day Kundi provinces. The Southern region would still remain the largest opium cultivating region. Hilmand province is expected to retain its status of the largest opium cultivating province.
- **Western region:** Two of the main opium cultivating provinces in this region, Farah and Badghis are expected to have an increase in opium cultivation and maintain a relatively high cultivation level. Opium cultivation in major rain-fed areas in Badghis could increase depending on weather conditions during spring season. An increase in opium cultivation is also expected in Hirat and Ghor provinces. Ghor province may not remain poppy-free in 2012. However, opium cultivation in the province would remain at an insignificant level compared to the main cultivation provinces. No major changes are expected in Nimroz province.
- **Central region:** No major changes are expected in Kabul province. However, due to the very low level of opium cultivation, the entire Central region could become poppy-free if effective eradication is implemented in Surobi district of Kabul province.
- **Eastern region:** Opium cultivation in Eastern region may increase. The cultivation level in Kunar, Laghman and Kapisa provinces will remain low. Opium cultivation in Nangarhar province is expected to increase. Despite the increase expected in Nangarhar, cultivation level in this region is expected to remain contained if compared with the high cultivation levels observed few years ago. Nuristan will probably remain poppy-free in 2012. An increase is expected in Kunar province while no major changes are expected in Laghman.
- **Northern region:** Most of the provinces in this region would remain poppy-free as in 2011. No major changes are expected in the opium cultivation in Faryab and Baghlan provinces which had lost their poppy-free status last year. However the cultivation level in these two provinces would remain low compared to the main cultivating provinces.
- **North-eastern region:** An increase is expected in the opium cultivation in Badakhshan province this year. The opium cultivation level in Badakhshan would remain moderate. Opium cultivation in Takhar province still unpredictable due to snow covers during the assessment survey. Kunduz would remain poppy-free like in 2011.

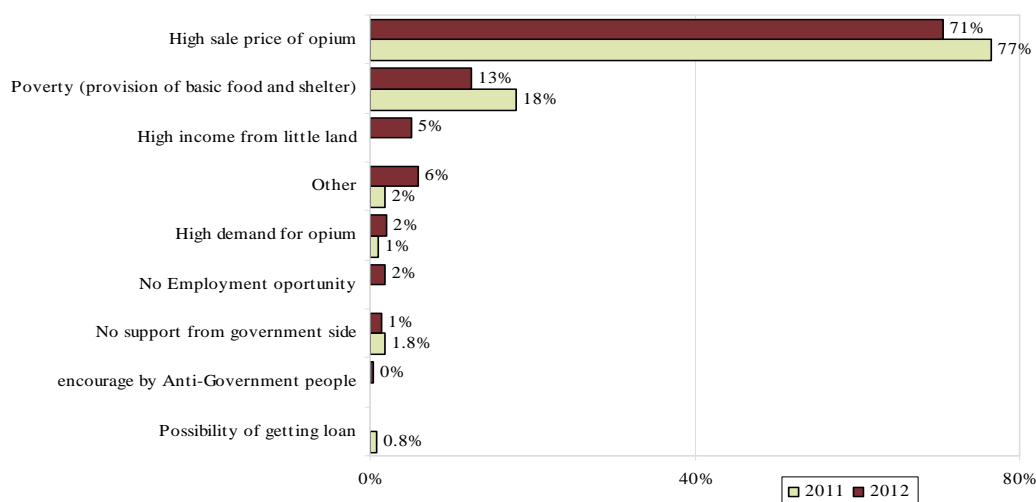
1.1. DRIVING FORCES BEHIND OPIUM CULTIVATION TRENDS

During the 2012 ORAS Phase 1 and 2, 535 village headmen from poppy growing and non-poppy growing villages were asked to state the main reason why farmers chose to cultivate opium instead of other crops or not to cultivate it at all.

Reasons for opium cultivation in 2012

“High sales price of opium” was the predominant reason (71%) for growing opium (77% in 2011). After many years of decreasing trends, the opium price has sharply increased in 2011 making opium more and more attractive to farmers. About 13% of respondents in villages with opium cultivation cited that poverty was the reason for cultivating opium. This was followed by “high income from little land” (5%) as reason for cultivating opium.

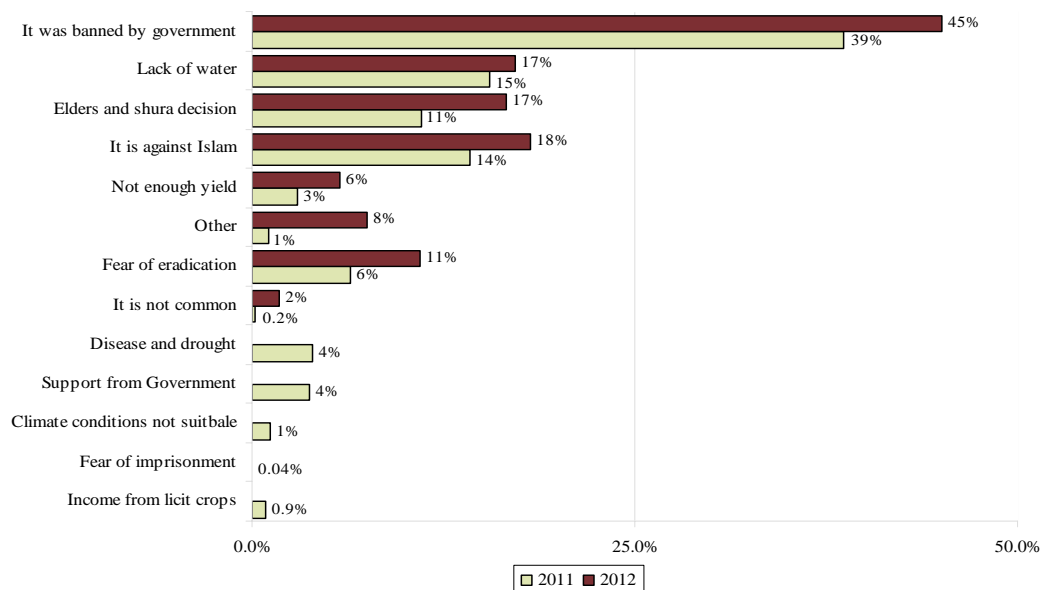
Figure 1 Reasons for opium cultivation in 2012 in opium growing villages



Reasons for not cultivating opium in 2012

The predominant reason given by 45% of respondents for not growing poppy was ‘banned by the Government’ (39% in 2011). 17% of headmen made a reference to the adverse climatic conditions prevailing in some poppy areas mentioning ‘lack of water’ as the reason not to cultivate poppy. 17% reported ‘Elders and Shura decision’ and 18% mentioned the ‘opium cultivation is against Islam’ as reason for not growing poppy. ‘Fear of eradication’, ‘support from Government’ and ‘Not enough yield’ were also mentioned, but by fewer headmen. The “not enough yield” reason was reported mainly from Eastern region.

Figure 2 Reasons for not cultivating opium in 2012



1.2. AGRICULTURAL ASSISTANCE

Among the surveyed villages, only 30% received agricultural assistance in the preceding year in the form of seed, fertilizers and irrigation facilities. 70% reported not to have received such assistance.

By comparison, 73% (46% of total villages surveyed) villages, which cultivated opium in 2012, had not received agricultural assistance in 2011. 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 27% (17% of total villages surveyed) of all villages surveyed had received agricultural assistance and still continued to grow opium. This indicates that other factors also play a role.

There was a strong, statistically significant association between lack of agricultural assistance and poppy cultivation.¹ Villages, which had not received agricultural assistance, were more likely to grow poppy than villages which had received assistance. This confirms the results of the Opium Surveys conducted during the preceding years, which found an equally strong association.

Table 3: Agricultural assistance vis-à-vis expected opium cultivation in 2012

Agricultural assistance received	Opium cultivation in 2012		Total
	No	Yes	
No	24%	46%	70%
Yes	13%	17%	30%
Total	37%	63%	100%

1.3. FIELD SECURITY DURING ORAS IMPLEMENTATION

The statistical association between poor security and poppy cultivation was even stronger than in the case of agriculture assistance. Almost all villages with very poor security and most villages with poor security were cultivating poppy. In other words, villages in insecure areas had a high probability of cultivating poppy, and villages in areas with good security were less likely to have poppy cultivation.

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

Table 4: Security situation vis-à-vis expected opium cultivation in 2012 (n=115)

Poppy cultivation 2012	Village Security situation				Grand Total
	Very Good	Good	Poor	Very Poor	
No	9%	23%	5%	0%	37%
Yes	3%	34%	23%	4%	63%
Grand Total	12%	57%	28%	4%	100%

¹ A statistically significant association was assumed when the significance of the Pearson Chi-square test of independence was below 0.05.

1.4. AWARENESS CAMPAIGN

An awareness campaign to prevent opium cultivation was conducted in many areas of Afghanistan in October and November 2011. 81% of villages in the surveyed area were reached by awareness campaigns. However, those villages which had been covered by the campaign, were less likely to grow poppy than those which had not been reached by the campaign. This association was significant. Therefore the awareness campaign seems to have had a positive influence on the decision not to grow opium.

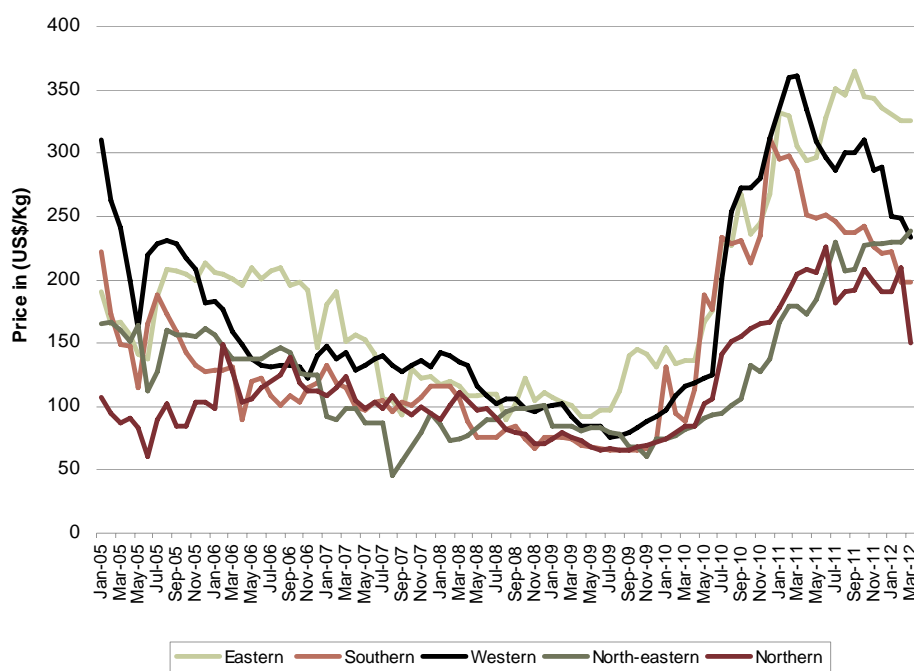
Table 5: Awareness campaign in 2011 vis-à-vis expected opium cultivation in 2012

Awareness campaign	No. of villages surveyed		Total
	No opium poppy cultivation in 2012	Opium poppy cultivation in 2012	
No	3%	16%	19%
Yes	34%	47%	81%
Total	37%	63%	100%

1.5. PRICES

UNODC collects monthly opium prices from 18 key provinces. In addition to this, the ORAS 2012 collected price information in the 544 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 March 2012. The detailed overview of opium prices is provided based on monthly Opium Price Report for Afghanistan, March 2012.

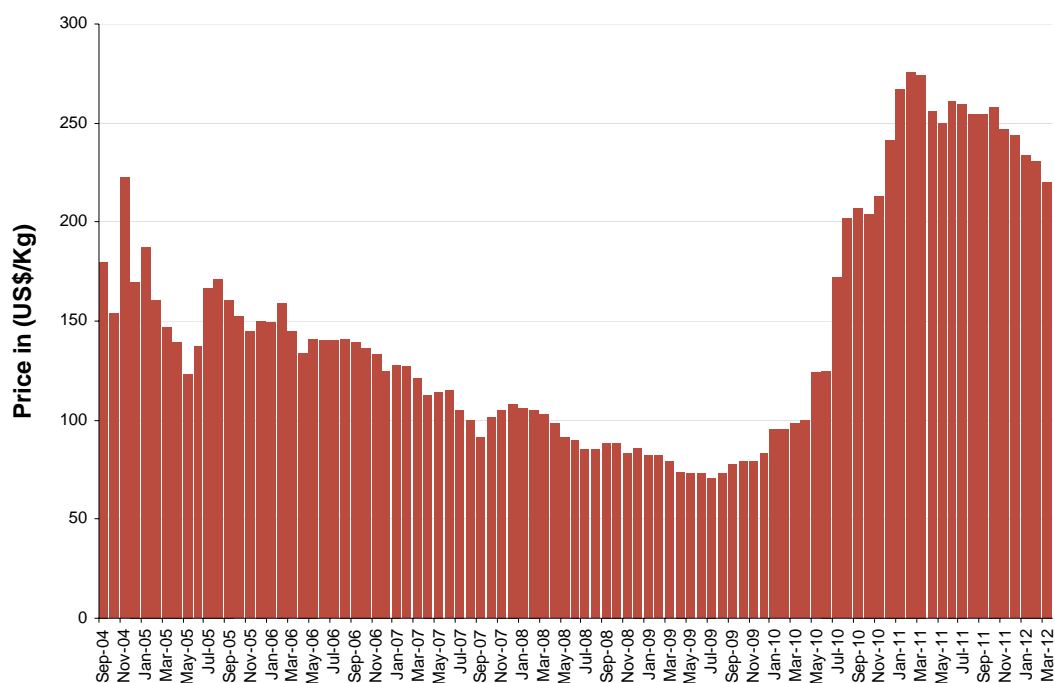
Figure 3 Regional average price of dry opium collected from traders, February 2005 – March 2012



Source: MCN/UNODC Monthly Opium Price Report for Afghanistan, March 2012

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.

During ORAS, respondents were asked about the market prices of agricultural commodities. A comparison of prices collected during ORAS 2011 and ORAS 2012 shows increases in the price wheat, rice and maize while there is slight decrease in the prices of opium between February 2011 and February 2012.

Figure 4 Average farm-gate prices for dry opium, September 2004 – March 2012

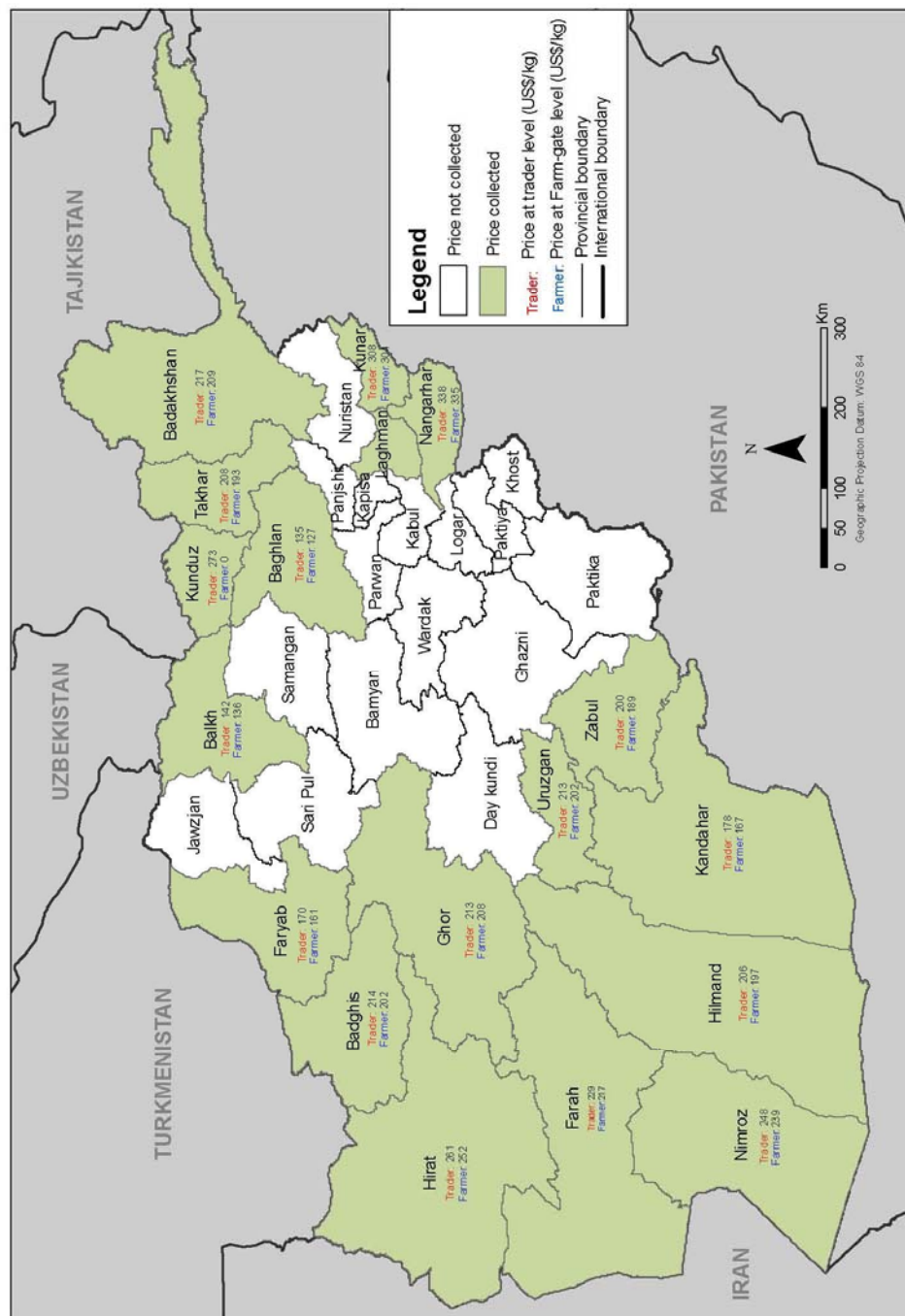
Source: MCN/UNODC Monthly Opium Price Report for Afghanistan, March 2012

Table 6: Price of dry opium and food grains in 2011 and 2012 (US\$/kg)

Crop name	Prices (US\$ per Kg)		% difference
	ORAS 2011	ORAS 2012	
Dry opium	256.21	254.39	-0.7%
Fresh opium	196.59	183.38	-7%
Wheat	0.40	0.45	15%
Rice	0.98	1.17	19%
Maize	0.33	0.34	3%

Source: ORAS 2012 Village Survey

Map 4 Dry opium prices March 2012 (US\$/kg)



Source: Government of Afghanistan - National monitoring system implemented by MCN/ UNODC
 Note: The boundaries and names shown 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

The debriefing of the surveyors indicated that there will be increase in opium cultivation in Badakhshan province in 2012. The increase will change the opium cultivation level in Badakhshan from low to moderate level. In 2011, opium cultivation in Badakhshan increased by 55%.

Opium cultivation details:

Cultivation in 2011 (hectares)	1,705
Cultivation practices	Irrigated and rain-fed
Projected trends in 2012	Increase
Cultivation level	Moderate
Planting time	Autumn/spring
Expected main harvest time	Late June and early July
Security situation	Good

TAKHAR PROVINCE

The opium cultivation status remains unpredictable in Takhar province due to large part of the province covered with snow at the time of survey. In 2011, Takhar province was poppy free.

Opium cultivation details:

Cultivation in 2011 (hectares)	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2012	Unpredictable
Cultivation level	Insignificant
Planting time	Autumn/spring
Expected main harvest time	Late may and early June
Security situation	Good

KUNDUZ PROVINCE

Respondents across all districts reported no change in opium cultivation in 2012 and the province is likely to remain poppy-free.

Opium cultivation details:

Cultivation in 2011 (hectares)	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2012	Poppy-free
Cultivation level	Poppy-free
Planting time	Autumn
Expected main harvest time	Early May
Security situation	Good (Poor at few places)

2.2 NORTHERN REGION

BAGHLAN PROVINCE

In 2011, Baghlan province lost its poppy free status. There will be no major change in the poppy cultivation in 2012. The province could become poppy-free if there is effective eradication of opium cultivation.

Opium cultivation details:

Cultivation in 2011 (hectares)	161
Cultivation practices	Irrigated and rain-fed
Projected trends in 2012	No major change
Cultivation level	Insignificant
Planting time	Autumn/spring
Expected main harvest time	Late May and early June
Security situation	Good (Poor at few places)

BAMYAN PROVINCE

Bamyan province is expected to remain poppy-free in 2012 like in 2011.

Opium cultivation details:

Cultivation in 2011 (hectares)	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2012	Poppy-free
Cultivation level	Poppy-free
Planting time	Spring
Expected main harvest time	Late July
Security situation	Very Good

BALKH PROVINCE

Balkh province is expected to remain poppy-free in 2012 like in 2011 and 2010. This trend may be attributed to successful campaigns by the Government against opium cultivation.

Opium cultivation details:

Cultivation in 2011 (hectares)	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2012	Poppy-free
Cultivation level	Poppy-free
Planting time	Autumn
Expected main harvest time	Late April and early May
Security situation	Good (Poor at few places)

FARYAB PROVINCE

Faryab became poppy-free in 2010 from 291 ha opium cultivation in 2008. In 2011 the province lost its poppy free status. It is expected that there will be no major change in opium cultivation in 2012. The province could become poppy-free if there is effective eradication of opium cultivation.

Opium cultivation details:

Cultivation in 2011 (hectares)	145
Cultivation practices	Irrigated and rain-fed
Projected trends in 2012	No major change
Cultivation level	Insignificant
Planting time	Autumn
Expected main harvest time	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 2010 and 2011 the province was poppy-free, and it is expected to remain poppy-free in 2012 as well.

Opium cultivation details:

Cultivation in 2011 (hectares)	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2012	Poppy-free
Cultivation level	Poppy-free
Planting time	Autumn and spring
Expected main harvest time	May
Security situation	Good

SAMANGAN PROVINCE

Samangan province was poppy-free in 2007, 2008, 2010 and 2011. It is expected to remain poppy-free in 2012.

Opium cultivation details:

Cultivation in 2011 (hectares)	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2012	Poppy-free
Cultivation level	Poppy-free
Planting time	Spring
Expected main harvest time	Late June and early July
Security situation	Very Good

SARI PUL PROVINCE

Sari Pul province was poppy-free in 2008, 2010 and 2011. In 2012, it is expected to remain poppy-free.

Opium cultivation details:

Cultivation in 2011 (hectares)	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2012	Poppy-free
Cultivation level	Poppy-free
Planting time	Spring
Expected main harvest time	Late June and early July
Security situation	Good

2.3 EASTERN REGION

NANGARHAR PROVINCE

There could be an increase in opium cultivation in Nangarhar province in 2012, but the cultivation level should remain moderate compared to the high levels few years ago. The main opium poppy growing districts are Khogyani, Sherzad and Lalpur districts. This year the cultivation has been extended to Chaparhar, Deh-Bala and Pachir Wagam districts.

Opium cultivation details:

Cultivation in 2011 (hectares)	2700
Cultivation practices	Irrigated
Projected trends in 2012	Increase
Cultivation level	Moderate
Planting time	Autumn
Expected main harvest time	Mid-April/ Early May
Security situation	Poor

KUNAR PROVINCE

Opium cultivation in 2012 is expected to increase, however the level of cultivation would remain low in Kunar. Main opium poppy growing districts in Kunar are Dara-i-pech, Shigal wa sheltan, Watapoor, Dangam , Chapa dara and Sawkai.

Opium cultivation details:

Cultivation in 2011 (hectares)	578
Cultivation practices	Irrigated and rain-fed
Projected trends in 2012	Increase
Cultivation level	Low
Planting time	Autumn
Expected main harvest time	Mid-April/ Early May
Security situation	Poor

LAGHMAN PROVINCE

No major change is expected in opium cultivation in 2012 in Laghman province, however the level of cultivation would remain low. In 2011, Alingar, Alisheng and Mihtarlam were the main poppy-cultivating districts.

Opium cultivation details:

Cultivation in 2011 (hectares)	624
Cultivation practices	Irrigated and rain-fed
Projected trends in 2012	No major change
Cultivation level	Low
Planting time	Autumn
Expected main harvest time	Mid-April/ Early May
Security situation	Poor

NURISTAN PROVINCE

Nuristan is located at a high elevation and is expected to remain poppy-free in 2012.

Opium cultivation details:

Cultivation in 2011 (hectares)	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2012	Poppy-free
Cultivation level	Nil
Security situation	Poor

KAPISA PROVINCE

There would be an increase in opium cultivation in 2012 in Kapisa province. This province was not poppy-free in 2011. The level of cultivation would remain insignificant. The main opium poppy growing districts are Tagab and Alasai.

Opium cultivation details:

Cultivation in 2011 (hectares)	181
Cultivation practices	Irrigated
Projected trends in 2012	Increase
Cultivation level	Insignificant
Planting time	Autumn/spring
Expected main harvest time	Late May
Security situation	Poor

2.4 CENTRAL REGION

GHAZNI PROVINCE

Ghazni province has been poppy-free since 2005. ORAS results suggest that the province will remain poppy-free in 2012.

Opium cultivation details:

Cultivation in 2011 (hectares)	Poppy-free
Cultivation practices	Irrigated
Projected trends in 2012	Poppy-free
Cultivation level	Nil
Security situation	Very poor

KHOST PROVINCE

Khost province has been poppy-free since 2007 and it is expected to remain so in 2012.

Opium cultivation details:

Cultivation in 2011 (hectares)	Poppy-free
Cultivation practices	Irrigated
Projected trends in 2012	Poppy-free
Cultivation level	Nil
Security situation	Poor

LOGAR PROVINCE

Logar province has been poppy-free since 2005 and it is expected to remain so in 2012.

Opium cultivation details:

Cultivation in 2011 (hectares)	Poppy-free
Cultivation practices	Irrigated
Projected trends in 2012	Poppy-free
Cultivation level	Nil
Security situation	Poor

PAKTIKA PROVINCE

Paktika province has been poppy-free since 2004 and the same trend is expected to continue in 2012.

Opium cultivation details:

Cultivation in 2011 (hectares)	Poppy-free
Cultivation practices	Irrigated and rain-fed
Projected trends in 2012	Poppy-free
Cultivation level	Nil
Security situation	Poor

PAKTYA PROVINCE

Paktya province has been poppy-free since 2005 and the same trend is expected to continue in 2012.

Opium cultivation details:

Cultivation in 2011 (hectares)	Poppy-free
Cultivation practices	Irrigated
Projected trends in 2012	Poppy-free
Cultivation level	Nil
Security situation	Poor

PARWAN PROVINCE

Parwan has been poppy-free since 2007 and it is expected to stay poppy-free in 2012.

Opium cultivation details:

Cultivation in 2011 (hectares)	Poppy-free
Cultivation practices	Irrigate
Projected trends in 2012	Poppy-free
Cultivation level	Nil
Security situation	Good

PANJSHIR PROVINCE

Panjshir province has always been poppy-free and it is expected to maintain the same status in 2012.

Opium cultivation details:

Cultivation in 2011 (hectares)	Poppy-free
Cultivation practices	Irrigated
Projected trends in 2012	Poppy-free
Cultivation level	Nil
Security situation	Very good

WARDAK PROVINCE

Wardak has been poppy-free since 2006 and it is expected to remain so in 2012.

Opium cultivation details:

Cultivation in 2011 (hectares)	Poppy-free
Cultivation practices	Irrigated
Projected trends in 2012	Poppy-free
Cultivation level	Nil
Security situation	Very poor

KABUL PROVINCE

There would be no major change in opium cultivation in Kabul in 2012. Opium cultivation in Kabul is confined to Surobi district where the security situation is very poor.

Opium cultivation details:

Cultivation in 2011 (hectares)	220
Cultivation practices	Irrigated
Projected trends in 2012	No major change
Cultivation level	Low
Planting time	Autumn
Expected main harvest time	Late May
Security situation	Very good (very poor in Surobi district)

2.5 SOUTHERN REGION

KANDAHAR PROVINCE

Last year there was an increase in opium cultivation in Kandahar province by 5% compare to 2010. In 2012, cultivation in Kandahar is expected to decrease. The cultivation level would still remain high. The main opium cultivation districts in 2011 were Ghorak, Khakrez, Maywand, Nesh, Panjwayee, Spin Boldak and Zhire. The decline in poppy cultivation is mainly expected in Panjwayee and Zhari districts due to an increased number of security post/bases of international and national forces.

Opium cultivation details:

Cultivation in 2011 (hectares)	27,213
Cultivation practices	Irrigated
Projected trends in 2012	Decrease
Cultivation level	High
Planting time	Autumn
Expected main harvest time	End of April/Beginning of May
Security situation	Very poor

HILMAND PROVINCE

No major change in opium cultivation is expected in Hilmand in 2012. The area under opium cultivation decreased slightly in 2011 to around 63,307 ha compared to 65,045 ha in 2010. In 2012, the cultivation level is expected to remain very high. The main opium cultivation districts in 2011 were Baghran, Garmser (Hazarjuft), Musa Qala, Nad Ali and Naher-i-Saraj. In 2011, there was significant reduction of opium cultivation in the central part of Hilmand which coincides with the so-called food zone. This year some further decline of poppy cultivation is expected in the northern part of central Hilmand up to the Boghra canal. Some farmers reportedly left central Hilmand with the intention to plant opium elsewhere and migrated to Farah province where they perceive conditions for opium cultivation to be more conducive. (See more details under Farah province)

Opium cultivation details:

Cultivation in 2011 (hectares)	63,307
Cultivation practices	Irrigated
Projected trends in 2012	No major change
Cultivation level	Very high
Planting time	Autumn
Expected main harvest time	Late April/Beginning of May
Security situation	Very poor

URUZGAN PROVINCE

Uruzgan has traditionally been one of Afghanistan's major opium poppy-growing provinces. Opium cultivation increased 7,337 ha in 2010 to 10,620 ha in 2011. In 2012, cultivation is expected to increase further. The main opium cultivation districts in 2011 were Dehrawud, Shahidi Hassas and Tirinkot (Provincial Centre). The increase in cultivation is expected mainly in Dehrawud district.

Opium cultivation details:

Cultivation in 2011 (hectares)	10,620
Cultivation practices	Irrigated
Projected trends in 2012	Increase
Cultivation level	High
Planting time	Autumn
Expected main harvest time	Mid-May
Security situation	Very poor

ZABUL PROVINCE

In 2011, there was a significant decrease by 46% in opium cultivation in Zabul province compared to 2010. In 2012, no major change is expected in opium cultivation. The main poppy growing districts in 2011 were Mizan and Daychopan.

Opium cultivation details:

Cultivation in 2011 (hectares)	262
Cultivation practices	Irrigated
Projected trends in 2012	No major change
Cultivation level	Low
Planting time	Autumn
Expected main harvest time	Mid-May
Security situation	Very poor

DAYKUNDI PROVINCE

In 2011, there was a 35% decrease in opium cultivation in Daykundi province and no major change is expected in 2012. The main opium poppy growing districts in 2011 were Gizab, Kijran and Kiti.

Opium cultivation details:

Cultivation in 2011 (hectares)	1,003
Cultivation practices	Irrigated
Projected trends in 2012	No major change
Cultivation level	Moderate
Planting time	Spring
Expected main harvest time	July
Security situation	Good (poor in two districts)

2.6 WESTERN REGION

HIRAT PROVINCE

In 2011, the poppy cultivation was stable compared to 2010. An increase is expected in opium cultivation in 2012. However, the level of opium cultivation will probably continue to remain low in 2012. The province could become poppy-free if effective poppy eradication measures were implemented. The only opium cultivation district in Hirat province is Shindand.

Opium cultivation details:

Cultivation in 2011 (hectares)	366
Cultivation practices	Irrigated
Projected trends in 2012	Increase
Cultivation level	Low
Planting time	Autumn/spring
Expected main harvest time	Late April/early May
Security situation	Good (poor at few places)

FARAH PROVINCE

Opium cultivation increased by 20% in 2011 compared to 2010. In 2012, opium cultivation is expected to further increase and the cultivation level will probably remain high in the province. Opium cultivation is expected to increase in all districts which were already growing opium in 2011, namely Bala Buluk, Bakwah, Delaram, Gulistan and Purchaman. In addition, opium cultivation is expected to spread to new districts and areas which were not or not much affected by opium cultivation in past years. Reportedly, this development is partly driven by farmers who left central Hilmand and migrated to Bakwah district in Farah province to resume opium cultivation in new areas where they perceive the risk of eradication to be lower. In central Hilmand, a significant reduction of opium cultivation was achieved in 2011 through a combination of measures including the provision of subsidized agricultural inputs, eradication, awareness campaigns, security and presence of government institutions.

Opium cultivation details:

Cultivation in 2011 (hectares)	17,499
Cultivation practices	Irrigated
Projected trends in 2012	Increase
Cultivation level	High
Planting time	Autumn
Expected main harvest time	Early May
Security situation	Poor

NIMROZ PROVINCE

In 2011, there was a 22% increase in opium cultivation compared to 2010. In 2012, no major change is expected in opium cultivation in the main opium growing district of Khash Rod. The level of cultivation is expected to remain moderate. 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 2011 (hectares)	2,493
Cultivation practices	Irrigated
Projected trends in 2012	No major change
Cultivation level	Moderate
Planting time	Autumn
Expected main harvest time	Mid-April
Security situation	Poor

GHOR PROVINCE

Ghor province was poppy-free since 2008. In 2012, an increase in opium cultivation is expected and the province may lose its poppy-free status. However, the cultivation level would remain insignificant. Last year, Ghor remained poppy free due to timely eradication efforts by the government.

Opium cultivation details:

Cultivation in 2011 (hectares)	Poppy-free
Cultivation practices	Irrigated
Projected trends in 2012	Increase (may not remain poppy-free)
Cultivation level	Insignificant
Planting time	Spring
Expected main harvest time	Late June
Security situation	Poor

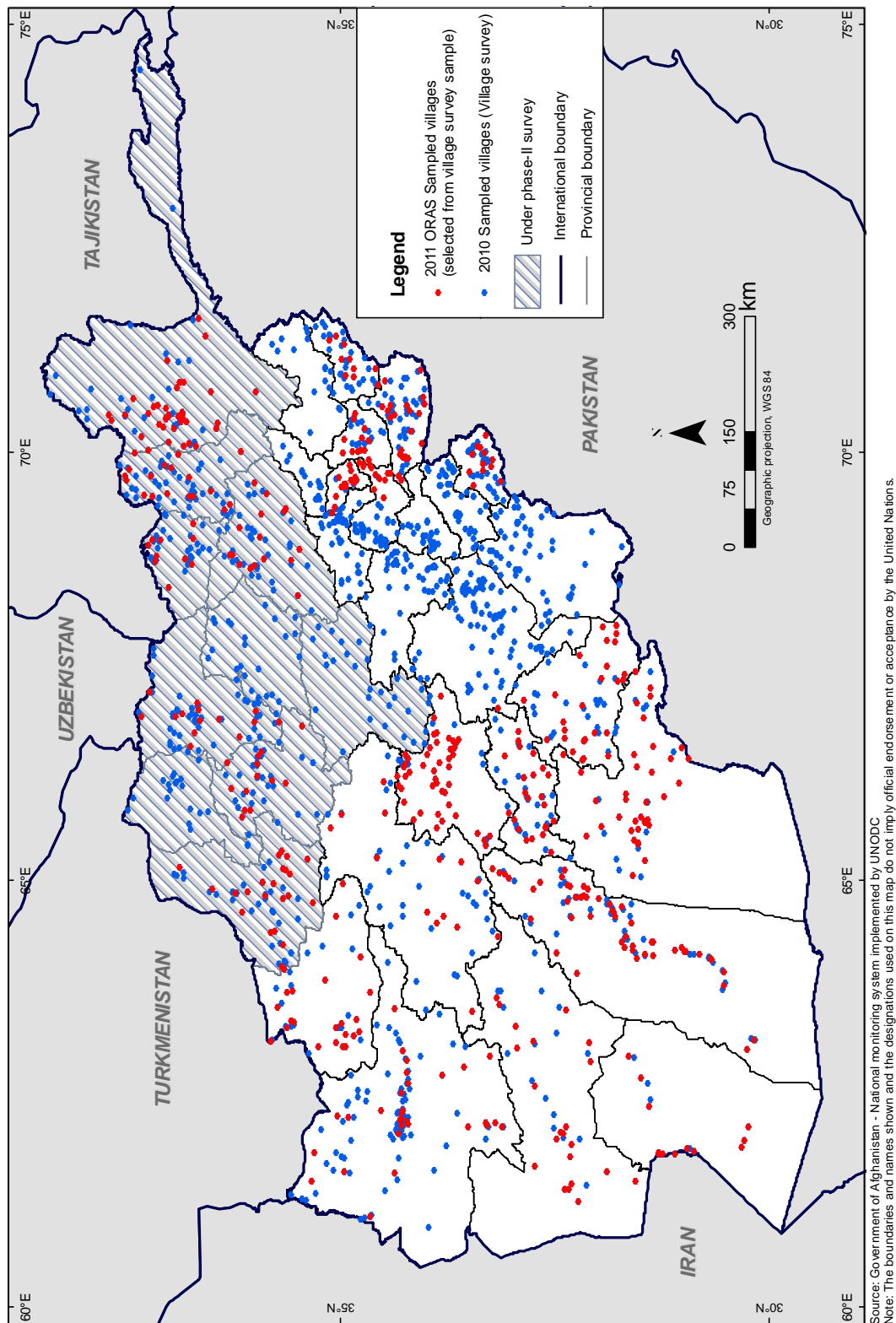
BADGHIS PROVINCE

In 2011, there was a decrease by 33% in opium cultivation compare to 2010. In 2012, the opium cultivation trend is expected to increase. There could be increase in opium cultivation in major rain-fed areas. The cultivation level would remain moderate. The main poppy growing districts are Bala Murghab and Ghormach.

Opium cultivation details:

Cultivation in 2010 (hectares)	1,990
Cultivation practices	Irrigated and rain-fed
Projected trends in 2011	Increase
Cultivation level	Moderate
Planting time	Spring
Expected main harvest time	Mid-June
Security situation	Good (poor in two district)

Map 5 Sampling frame and selected villages for the Winter Assessment 2012 (Phase 1 and 2)



Note: The villages surveyed for the Winter Assessment 2012 are a subsample of the villages surveyed during the 2011 Opium Survey.

3 METHODOLOGY

The Winter Opium Risk Assessment in 2012 was divided in to two phases. In the first phase Southern, Western, Eastern and Central regions were surveyed. Northern and North-eastern regions were surveyed in the second phase of ORAS started in the mid of February.

The first phase of the Opium Risk Assessment including training and deployment was conducted from 25 November 2011 to 3 January 2012 by 57 local field surveyors. The survey was jointly planned and implemented by the Ministry of Counter-Narcotics (MCN) of the Government of Afghanistan and UNODC.

The second phase of the Winter Opium Risk Assessment including training and deployment was conducted from 5 February 2012 to 15 March 2012 by 11 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 frame

For the 2012 ORAS, four strata were defined:

1) Poppy risk area covers whole province (11 provinces)

Sample for ORAS was a sub-sample of the village surveyed in 2011, whereby half the sample was drawn from villages having reported opium cultivation in 2011 and half from non-growing villages using systematic random sampling. The provinces covered under the first strata were Hilmand, Kandahar, Uruzgan, Day Kundi, Zabul, Farah, Nimroz, Badghis, Kunar, Laghman and Ghor.

2) Poppy risk only in target areas within province (5 provinces)

In provinces where opium cultivation in 2011 was confined to certain areas (so-called target areas in the 2011 survey), a completely new sample of villages was drawn randomly from the village frame for the ORAS 2012 as the number of villages covered by the 2011 opium survey was too low to select a sufficiently high number of villages for the ORAS. The provinces covered under the first strata were Hirat, Badakhshan, Baghlan and Faryab.

3) Poppy risk low or confined to small and/or difficult to access areas (6 provinces)

In provinces where opium areas were too small, too disperse or difficult to access, no sample was drawn. Instead, surveyors visited villages and gathered information on the opium cultivation trends along observation routes and in specific areas of interest. The provinces covered under the first strata were Balkh, Kabul, Sari Pul, Jawzjan, Takhar, Nangarhar and Kapisa.

4) Outside risk area (12 provinces)

Some provinces, which have been poppy-free for a longer period of time and where no resumption of opium cultivation was expected in 2012, were excluded from the frame: Logar, Paktiya, Paktika, Panjshir, Ghazni, Wardak, Parwan and Nuristan.

In the first phase of the ORAS 2012 covering Eastern, Southern, Central and Western regions, 477 villages in 109 districts were selected from strata 1 and 2. Out of the selected 477 village, only 458 villages could be surveyed. The remaining 19 villages could not be surveyed mainly because of security reasons.

Limitations:

The ORAS is designed to assess cultivation trends; is not meant for calculating quantitative area 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. The trend assessment for each province is thus a combination and triangulation of information gathered systematically and through unsystematic observation. It is based as much on experience and the personal judgement of field surveyors and analysts as on statistical analysis. While this is a limitation as it is difficult to determine how reliable the established trend is, the survey design allows to assess opium cultivation at a very early point in time when quantitative, systematic approaches do not yet work.

Training of surveyors and data collection

The surveyors were selected on the basis of a written test, their experience in conducting opium poppy surveys as well as knowledge of local customs and their acceptance by local communities. During the training period, the MCN/UNODC survey coordinators and 57 surveyors were trained in understanding the questionnaire and effective survey techniques.

The surveyors conducted structured interviews with the headmen of selected villages in provinces within the sampling frame. UNODC and MCN coordinators monitored data quality and the progress of the survey closely. Special monitoring cells consisting of survey coordinators and trusted supervisors were setup in all the three regions to control and monitor the survey activities in the field effectively.



Evaluation for selection of surveyors in Southern region



ORAS field survey (headman interview) in Eastern region



ORAS training in the Eastern region



ORAS field survey (headman interview) in Western region

Debriefing

This year the debriefing exercise was carried out in the regions in the presence of all surveyors and survey coordinators involved in the field surveys in order to obtain accurate and first hand information about the opium cultivation trends. A core team of MCN and UNODC visited the regional offices and carried out the debriefing sessions in a structured and systematic manner.

In addition to the information obtained through village survey analysis the debriefing information was very helpful 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 2011 and expected trends in 2012

Province	Cultivation 2005 (ha)	Cultivation 2006 (ha)	Cultivation 2007 (ha)	Cultivation 2008 (ha)	Cultivation 2009 (ha)	Cultivation 2010 (ha)	Cultivation 2011 (ha)	Change 2010-2011 (ha)	Change 2010-2011 (%)	2012 Cultivation trend
Ghazni	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	NA	NA	No major change
Kabul	Poppy free	80	500	310	132	152	220	68	45%	No major change
Khost	Poppy free	133	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	NA	NA	No major change
Logar	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	NA	NA	No major change
Paktika	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	NA	NA	No major change
Paktya	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	NA	NA	No major change
Panjshir	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	NA	NA	No major change
Parwan	Poppy free	124	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	NA	NA	No major change
Wardak	106	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	NA	NA	No major change
Central Region	106	337	500	310	132	152	220	68	45%	
Kapisa	115	282	835	436	Poppy free	Poppy free	181	NA	NA	Increase
Kunar	1,059	932	446	290	164	154	578	424	275%	Increase
Laghman	274	710	561	425	135	234	624	390	167%	No major change
Nangarhar	1,093	4,872	18,739	Poppy free	294	719	2,700	1,981	276%	Increase
Nuristan	1,554	1,516	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	NA	NA	No major change
Eastern Region	4,095	8,312	20,581	1,151	593	1,107	4,083	2,976	269%	
Hilmand	26,500	69,324	102,770	103,590	69,833	65,045	63,307	-1,738	-3%	No major change
Kandahar	12,989	12,619	16,615	14,623	19,811	25,835	27,213	1,378	5%	Decrease
Uruzgan	2,024	9,703	9,204	9,939	9,224	7,337	10,620	3,283	45%	Increase
Zabul	2,053	3,210	1,611	2,335	1,144	483	262	-221	-46%	No major change
Day Kundi	2,581	7,044	3,346	2,273	3,002	1,547	1,003	-544	-35%	No major change
Southern Region	46,147	101,900	133,546	132,760	103,014	100,247	102,405	2,158	2%	
Badghis	2,967	3,205	4,219	587	5,411	2,958	1,990	-968	-33%	Increase
Farah	10,240	7,694	14,865	15,010	12,405	14,552	17,499	2,947	20%	Increase
Ghor	2,689	4,679	1,503	Poppy free	Poppy free	Poppy free	Poppy free	NA	NA	Increase (May not be poppy free)
Hirat	1,924	2,287	1,525	266	556	360	366	6	2%	Increase
Nimroz	1,690	1,955	6,507	6,203	428	2,039	2,493	454	22%	No major change
Western Region	19,510	19,820	28,619	22,066	18,800	19,909	22,348	2,439	12%	
Badakhshan	7,370	13,056	3,642	200	557	1,100	1,700	600	55%	Increase
Kunduz	275	102	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	NA	NA	No major change
Takhar	1,364	2,178	1,211	Poppy free	Poppy free	Poppy free	Poppy free	NA	NA	Unpredictable
North-eastern Region	9,009	15,336	4,853	200	557	1,100	1,700	600	55%	
Baghlan	2,563	2,742	671	475	Poppy free	Poppy free	161	161	NA	No major change
Balkh	10,837	7,232	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	NA	NA	No major change
Bamyan	126	17	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	NA	NA	No major change
Faryab	2,665	3,040	2,866	291	Poppy free	Poppy free	145	145	NA	No major change
Jawzjan	1,748	2,024	1,085	Poppy free	Poppy free	Poppy free	Poppy free	NA	NA	No major change
Samangan	3,874	1,960	Poppy free	Poppy free	Poppy free	Poppy free	Poppy free	NA	NA	No major change
Sari Pul	3,227	2,252	260	Poppy free	Poppy free	Poppy free	Poppy free	NA	NA	No major change
Northern Region	25,040	19,267	4,882	766	Poppy free	Poppy free	306	306	NA	
Total (rounded)	104,000	165,000	193,000	157,000	123,000	123,000	131,000	8,000	7%	

*Due to administrative boundary changes, the 2010 and 2011 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.