



United Nations
Office on Drugs and Crime



UNODC INFORMATION CENTRE
For researching and analyzing transnational
threats related to drugs and crime



AFGHANISTAN DRUG INSIGHTS VOLUME 2

2024 OPIUM PRODUCTION AND RURAL DEVELOPMENT

VOLUME 1: OPIUM POPPY
CULTIVATION 2024

VOLUME 2: 2024 OPIUM PRODUCTION
AND RURAL DEVELOPMENT

NOVEMBER 2024

Acknowledgements

This report was prepared by the Research and Trend Analysis Branch, United Nations Office on Drugs and Crime (UNODC), supported by the UNODC Information Centre for Researching and Analysing Translational threats related to Drugs and Crime. It is part of a series of shorter reports for 2024 that detail several developments in Afghanistan.

UNODC is grateful for the financial contribution of the United States of America to the Afghanistan Opium Survey.

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THE SERIES ON AFGHANISTAN DRUG INSIGHTS

The Afghanistan Drug Insights are a series of reports that provide latest data and in-depth analysis on aspects of the evolving drug situation in Afghanistan. This second volume provides the latest figures on national and regional opium poppy production in 2024 and the challenges farmers are facing as they adapt to new economic conditions. The remaining reports in the series will cover a range of topics related to the drug situation in Afghanistan, including the socioeconomic situation of farmers after the drugs ban; drug trafficking and supply; and treatment availability and drug use.

Given the unprecedented nature of the ongoing drugs ban in Afghanistan, having continued for a second year, UNODC has sought to examine different aspects of the drug situation in that country. Taken together, reports in the series paint a comprehensive picture of the enforcement of the ban on production, trafficking and consumption of all drugs, and delve deep into the impacts of the ban on the Afghan population, as well as on neighbouring countries and the wider region.

The insights are aimed at informing efforts to address demand and supply of drugs within and outside Afghanistan in an objective and timely manner, using latest data at highest quality standards.

The present insight has been produced under the project “Monitoring of Opium Production in Afghanistan” (AFG/F98). Information and data contained in this report, unless otherwise stated, are based on data collected by UNODC through remote sensing techniques, rural village surveys; as well as through global data collections on drugs (UNODC Annual Report Questionnaires and UNODC Drugs Monitoring Platform). Data on opium cultivation and production are based on the Afghanistan Opium Surveys 1994-2020 jointly published by UNODC and the Government of Afghanistan, as well as the Afghanistan Opium Surveys conducted by UNODC in 2021, 2022, and 2023.





AFGHANISTAN DRUG INSIGHTS VOLUME 2:

2024 OPIUM PRODUCTION AND RURAL DEVELOPMENT

Opium production and the challenges faced by farmers after two years of reduced poppy cultivation

Key points

Opium production in Afghanistan continues being much lower than before the drugs ban in 2022, despite an increase by 30% between 2023 and 2024, reaching 433 tons in 2024. Even with such an increase, production remains 93% below 2022 levels, prior to the enforcement of the drugs ban by the De facto Authorities (DfA).

In terms of geography, cultivation has shifted. While the South-western provinces were the epicentre of opium cultivation in the last two decades, including through 2023, in 2024, over two thirds of opium production were concentrated in the North-eastern provinces, particularly Badakhshan.

Maintaining a low level of opium cultivation and production in two consecutive years is unprecedented in Afghanistan. The previous ban in the year 2000 only lasted for a year before higher levels of production resumed.

In 2024, farmers cultivated more alternative crops on land that was previously left fallow, turning to staples such as cereals, and to a lesser extent cash crops like cotton. However, crops cultivated by farmers in alternative to opium remain significantly less profitable than opium, with opium providing up to 60 times more revenues when compared to wheat. Without profitable licit alternatives, the continued loss of opium income could encourage some farmers to challenge the drug ban and return to opium poppy cultivation, shift to other negative coping mechanisms or migrate outside of the country.

The value of the opiate harvest has grown by 130% when compared to 2023, but remains 80% lower than in 2022. Although rising opium prices have moderately compensated for the steep drop in cultivation area, the value of the 2024 opium harvest is still around 80% lower than in 2022, at roughly US\$260 million. The total potential farmer revenue for 2024 was about 130% higher than in 2023, due to a slight yield increase and a sharp rise in prices, which have averaged about US\$740 per kilogram nationwide.

The DfA reported on the eradication of opium fields across Afghanistan. However, low opium production levels are primarily the result of farmers adhering to the ban, choosing not to cultivate poppy rather than due to eradication efforts after cultivation.

Climatic factors further compounded challenges faced by farmers.

An unseasonably warm and dry autumn and early winter stunted all crops growth, followed by an exceptionally cold March and devastating torrential rains. These extreme weather events have severely impacted agricultural output, placing additional strain on Afghan farmers.

The lack of licit alternatives to poppy cultivation appears to have increased the illicit production of other substances, such as synthetic drugs.

Drugs such as methamphetamine are experiencing much more stable prices than drugs from agricultural origin, such as opium and cannabis, which confirms UNODC research regarding production and trafficking of methamphetamine.

Minimal opium production for a second consecutive year raises concerns that illicit cultivation in other countries could increase to meet global demand.

While there are some reports of this occurring, the scale and spread remain unclear. Nevertheless, there is need for greater international cooperation to address this risk.

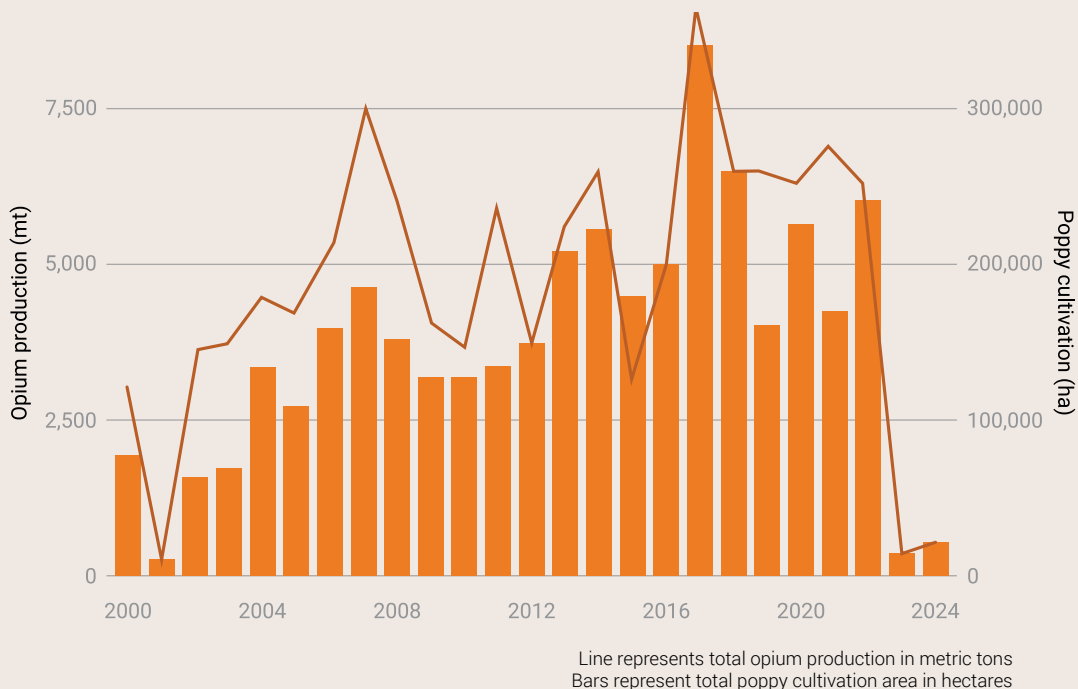
Policy implications

To ensure that the narcotic production ban is comprehensive and sustainable, a series of measures need to be taken in the agriculture sector and beyond, both within Afghanistan and internationally:

- **The country's economy needs diversification to support its transition from illicit to licit production:** the continued sharp reduction in opium cultivation revenues means poppy-dependent rural communities require sustained support through humanitarian assistance and alternative livelihood options in the short and medium term. In the long term, the country must invest to secure a transition from an illicit opium-based economy to a licit economy, diversified across all sectors– agriculture, manufacturing, and services – supplying both domestic and international markets.
- **Preventing drug production from shifting to new regions, both within the country and abroad is necessary:** the shift in cultivation to the North-east poses a risk of further expansion, given current production trends and agricultural land availability. The shift could undermine the sustainability of the poppy ban, requiring close monitoring, alternative livelihood support, and broader regional cooperation.
- **Upgrading farmers' skills is necessary to increase agricultural productivity and income:** expanding the cultivation of licit crops as alternatives to opium requires stronger support to farmers to prevent soil depletion and over-farming. Farmers need training in sustainable, intensive agriculture, including best practices such as cultivating drought-resistant or soil-enriching crops to address the impacts of climate change. Farmers also need support to invest in up-to-date tools and technologies that make agricultural practices more efficient and profitable. All these initiatives should ensure that women's specific economic needs are well-represented in the national economic landscape.
- **There is a need to upgrade infrastructure to increase agricultural productivity and income:** value addition requires investing in roads, irrigation systems, energy, machinery, and equipment. Roads are necessary for market access, while water infrastructure investments should include rainwater harvesting structures, water canals, and solar-powered drip irrigation to maximize water use efficiency. Energy infrastructure is also needed to support post-harvest management facilities, including cold storage.
- **It is necessary to prevent drug production from shifting to alternative synthetic drugs and non-medical use of pharmaceutical drugs, both domestically and internationally:** as Afghan opiate stocks decrease overtime, international drug markets might seek for other drug sources. It is crucial for regional and global actors to adopt a coordinated approach to address the growing complexity of drug production and trafficking in the region before it becomes an even more serious issue.

Opium production

Figure 1: Afghan opium production and poppy cultivation estimates, 2000-2024



Now entering its second year of enforcement, the drug ban continues to hold. In 2024, the area under cultivation was estimated at 12,800 ha, or 19% more than in 2023 (10,800 ha), but still far below levels prior to the ban. In 2022 an estimated 232,000 ha were cultivated. Likewise, national opium production in 2024 increased 30% compared to 2023, reaching 433 tons of opium. This increase of around 100 tons¹ is substantial compared to 2023 and given the current elevated prices it has a certain economic value, but it is still 93% lower than the last annual pre-ban harvest total of 6,200 tons in 2022. Maintaining a low level of opium cultivation and production in two consecutive years is unprecedented in Afghanistan. The first major opium ban in 2001 saw a sharp reduction on the first year but production resumed the year after.

¹ UNODC *Afghanistan opium survey 2023*

For 2024, the estimated total of 433 tons could be converted into a range of 32-50 tons of heroin of export quality (50-70% purity), which is slightly higher than the 24-38 tons of export quality heroin produced in 2023, but down substantially from the 350-580 tons estimated in 2022.

The economic consequences of the steep reduction in opium production are only beginning to manifest. The release of opium stocks² due the historically high prices has likely softened some of the immediate financial impacts of the loss of opium income. However, if the drugs ban continues to be followed in the coming years, many Afghan farmers could face severe economic hardship as they liquidate their remaining opium stocks. The reliance on opium poppy cultivation has long been a source of income for some rural households, so shifting away from opium threatens rural livelihoods if no efforts are made to find suitable alternatives. These economic pressures may lead some farmers to return to poppy cultivation, enticed by higher opium prices and the lack of alternative crops of similar profitability. This shift could also be exacerbated by the uneven enforcement of the drug ban across the country. South-Western provinces, traditionally the heart of Afghanistan's opium production, is where the ban in poppy cultivation has been most successful, leading to massive production decreases. In contrast, the North-eastern provinces now account for over two-thirds of the country's total opium production.

Looking at regional variations, the North-eastern provinces have become the epicentre of opium production in 2024, while other areas such as Helmand and Kandahar—major opium-producing regions during the previous era —have seen production sharply decline. However, even within these Southern provinces, small but significant pockets of poppy cultivation remain, mostly in remote or less accessible areas. In western Afghanistan, provinces like Badghis or Farah have experienced a more generalized increase in opium cultivation and production between 2023-2024, reflecting the broader challenge of uneven economic impact.

² More details available in the forthcoming Afghanistan Drug Insights Volume 4

Figure 2: Regional distribution of opium production, 2022-2024

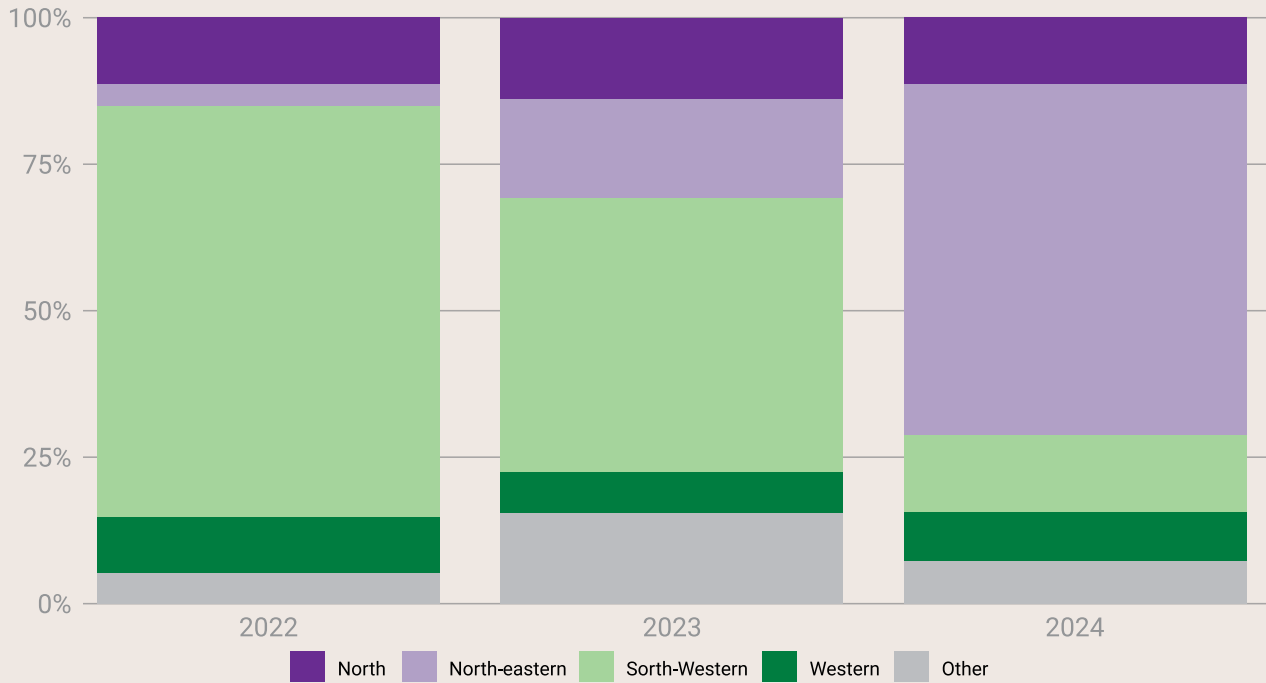


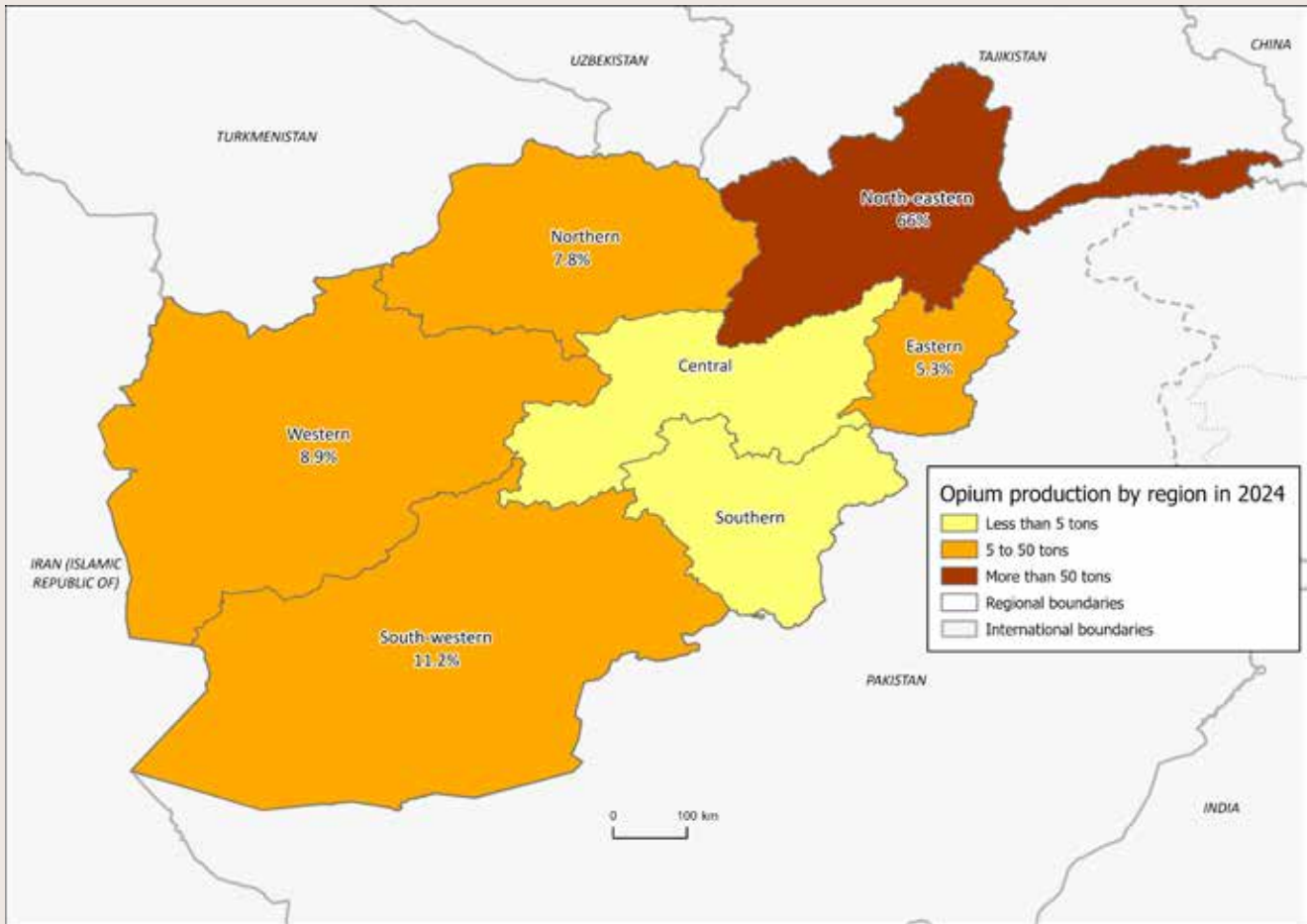
Table 1: Regional estimated totals of poppy cultivation in the hectares and opium production in tons, 2022-2024³

	2022			2023			2024		
Region	Poppy (ha)	Opium (Tons)	Yield (kg/ha)	Poppy (ha)	Opium (Tons)	Yield (kg/ha)	Poppy (ha)	Opium (Tons)	Yield (kg/ha)
Central	1,236	38	30.7	Poppy free	Poppy free	-	Poppy free	Poppy free	-
Eastern	7,165	268	37.4	1,329	47	34.8	528	23	39.2
Northern	16,415	555	33.8	983	37	35.3	899	34	34.8
North-eastern	4,920	181	36.8	1,573	60	35.4	7,563	286	37.7
Southern	163	6	36.8	Poppy free	Poppy free	-	Poppy free	Poppy free	-
South-western	169,791	4,496	26.5	5,316	158	29.8	1,874	49	25.8
Western	33,059	656	19.8	1,142	25	21.3	1,679	39	22.9
National	233,000	6,200	30.8	10,800	333	32.3	12,800	433	33.9

Note: Cultivation and production estimates may not sum up to totals as they are rounded to nearest whole number. National cultivation total and regional production values includes opium poppy found in poppy-free provinces. Yield estimates in 2024 have been calculated using a new machine learning method and may not be directly comparable with prior years.

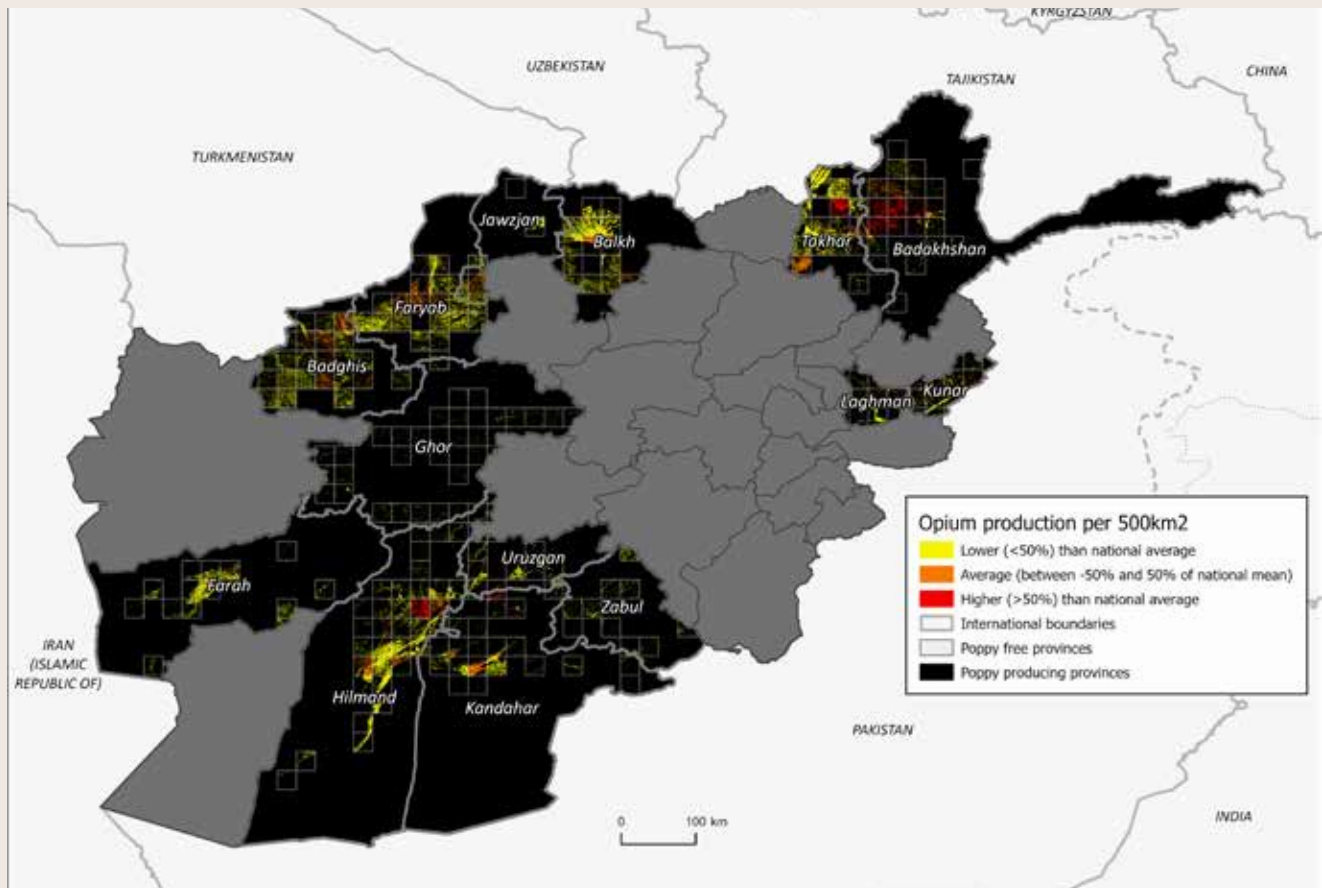
³ Yield estimates in 2024 have been calculated using a machine learning method fed by a variety of earth observation datasets and climate indices in order to generate yield for each region. Further details can be found in: https://www.unodc.org/documents/crop-monitoring/Afghanistan/AOS_2024_Methodology.pdf

Figure 3: Opium production by region in 2024



The boundaries and names shown, and the designations used on this map, do not imply official endorsement or acceptance by the United Nations. Dotted line represents approximately the Line of Control in Jammu and Kashmir agreed upon by India and Pakistan. The final status of Jammu and Kashmir has not yet been agreed upon by the parties.

Figure 4: Opium production density per 500km² in 2024



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Opiate economy

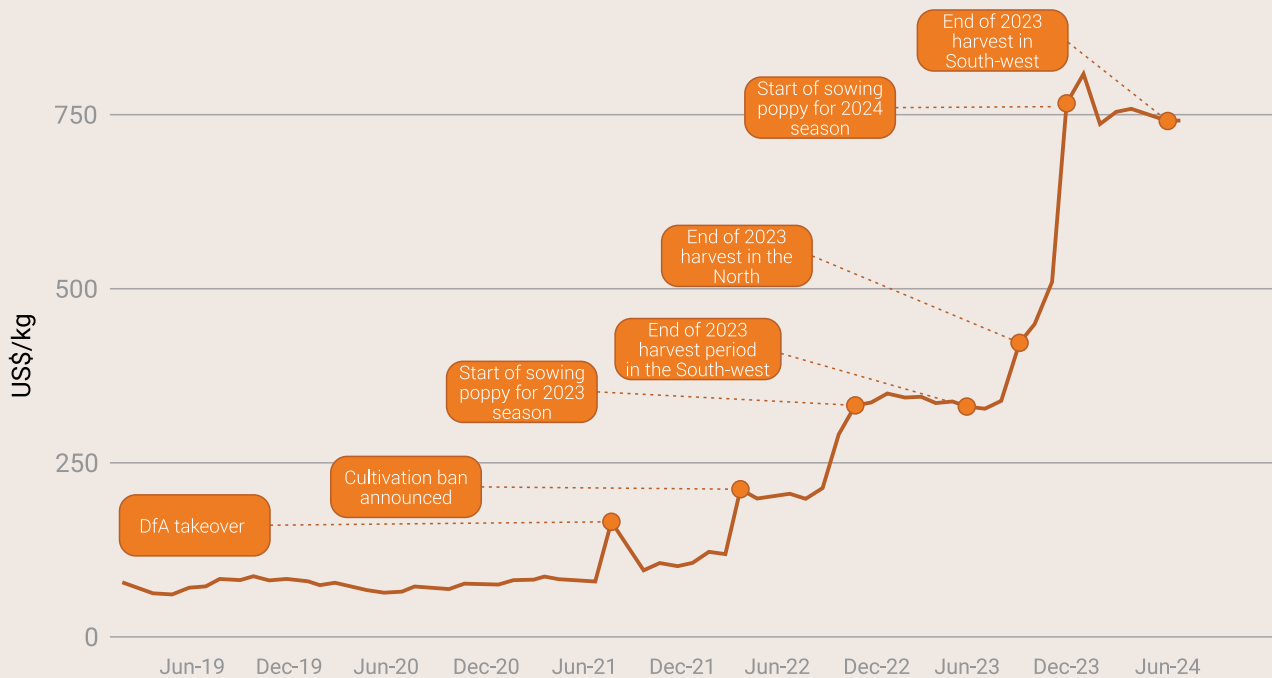
Dry opium prices continued to increase in 2024 after hitting historic highs at the start of the 2023 harvest season. The average annual price for a dried kilogram of opium in 2023 at trader level was US\$440. Between January and June 2024, the same average price reached US\$740. It was not possible to collect the prices of opium sold by farmers (so called Farmgate price) because too little opium was sold at the farmgate in 2024⁴.

Prior to the De-facto Authorities (DfA) takeover and the subsequent drug ban, dry opium prices were closer to US\$75 a kilogram. There was an initial jump in prices, which reflected immediate uncertainty when the DfA gained control of the country. In the second half of 2021 and until the announcement of the drug ban by the authorities in April 2022, monthly kilogram prices increased to around US\$110. Current prices are about seven times higher than the long-running pre-ban average and are now hovering around US\$750 per kilogram and about four times higher than when the drug ban was announced.

In the South-western region, which has been in the past the centre of opium production in the country, prices remained in 2024 the highest at well over \$1,100 a kilogram. The North-eastern region, in 2024, reported the lowest price of a kilogram at the trader level, hovering around \$500 a kilogram.

⁴ Farmgate and dry opium prices track very closely, and dry prices historically have been about 8% more than farmgate prices, although that gap has closed in recent years to 2-5%.

Figure 5: Monthly national average dry opium prices 2019-2024



The estimated potential income for farmers from opium production (farmgate value of that year’s harvest excluding the sale of stocks) in 2021 was estimated to be US\$425 million. The following year, potential earnings tripled to an estimated US\$1.36 billion, the highest value since the record harvest of 2017. Of that, cultivators in Hilmand, the country’s largest opium-producing province, could have earned some US\$733 million. The increase in earnings was driven by jumps in farmgate prices and not because of increased productivity.

In 2023, the first year of the drug ban enforcement, total national potential farmer’s income from the sale of that year’s opium harvest was sharply reduced by more than 92% to an estimated US\$113 million. Even at much higher prices, the amount sold from the 2023 harvest was much reduced. Alongside higher prices, this reflects a general shortage in the availability of fresh opium. In 2024, with higher average farmgate prices, farmers could have potentially generated some US\$260 million. The increase in potential income in 2024 is mainly driven by sharp price increases and to a lesser extent by higher production levels. Taken together, there has been much less fresh opium sold by farmers to traders, higher opium prices are likely to signal overall shortages (or the perception of shortages) in the availability of opium in Afghanistan.

Figure 6: Farmer's income from opium sales to traders, 2008-2024

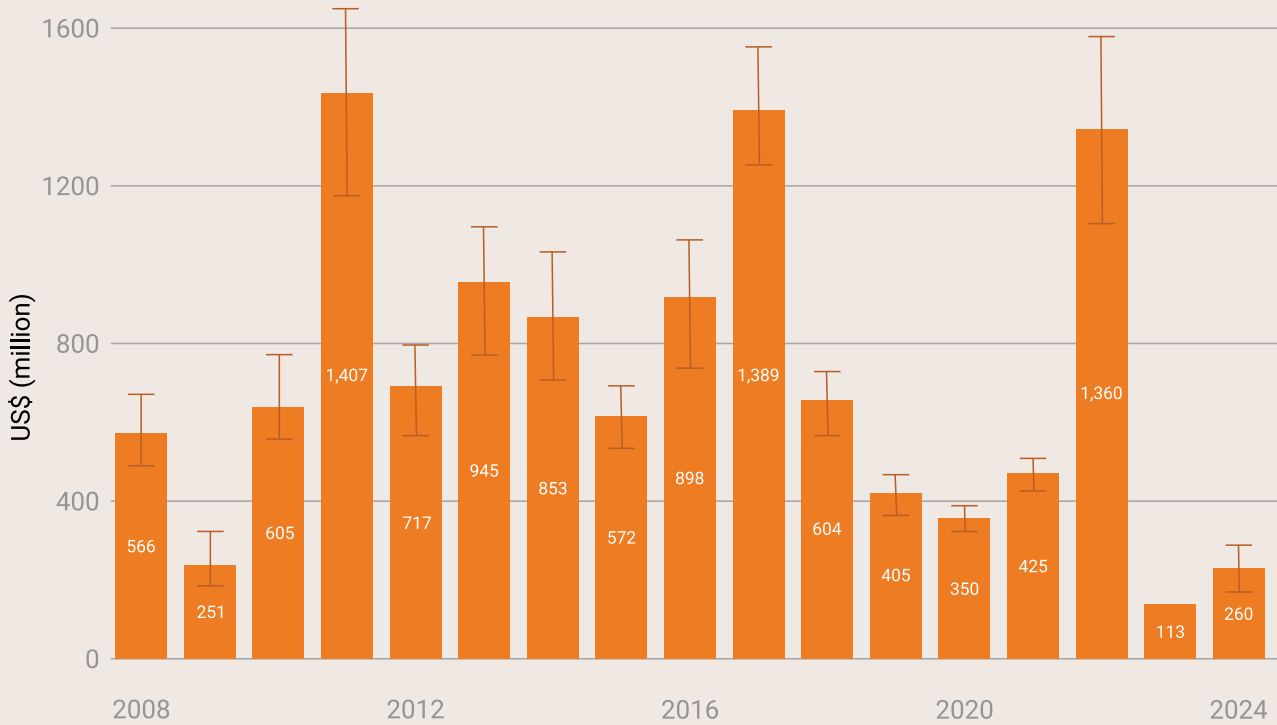
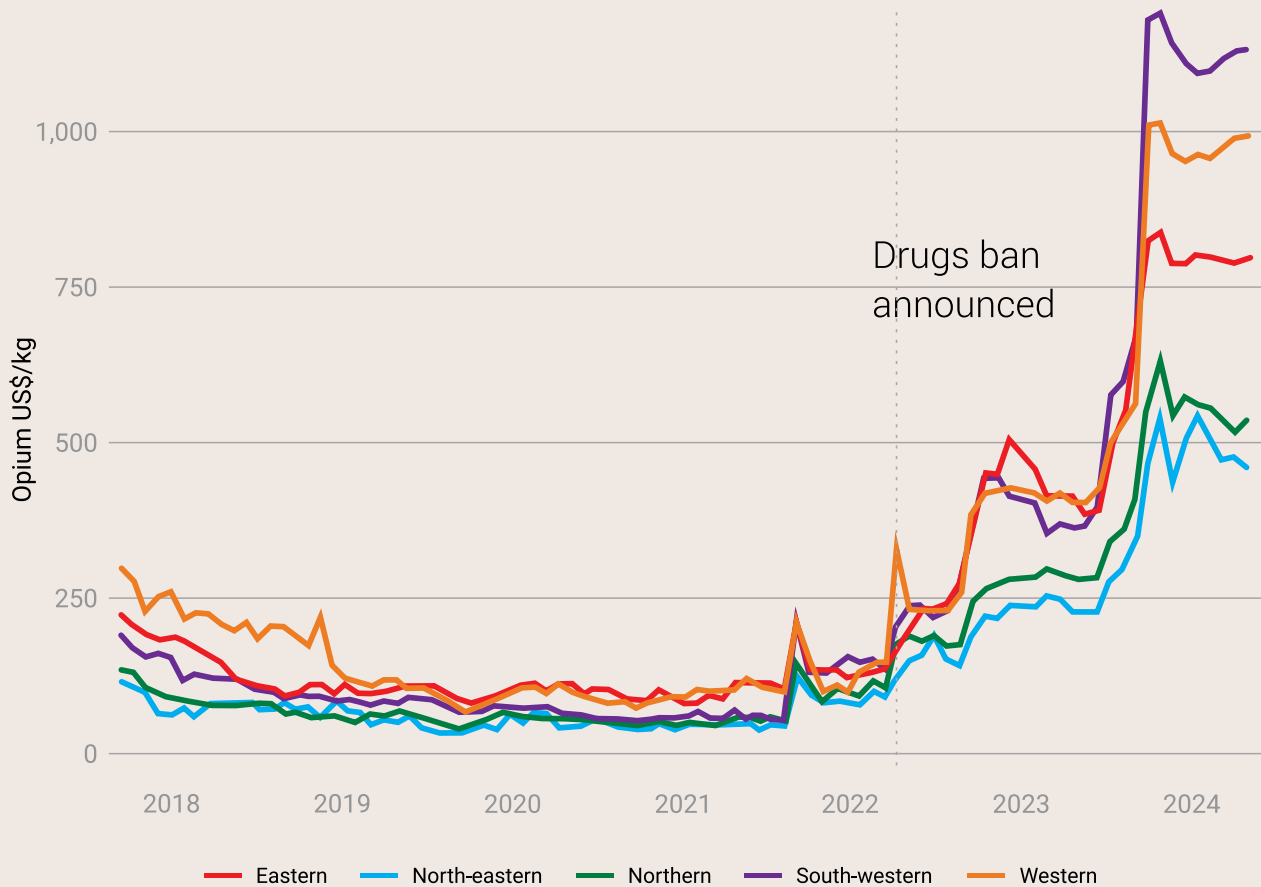


Figure 7: Monthly regional trader prices for dry opium, 2017-2024



Prices are not adjusted for inflation
Data from UNODC Afghanistan Price Monitoring

As of 2024, the North-eastern region of the country accounted for two-thirds of national opium production, generating some \$135 million or just over half of the national total income from the sale of harvested opium. In 2022, that region's share of the national total potential revenues from the sale of that year's opium harvest was estimated to be about six percent. Nevertheless, remaining opium holdings in the South-western region, which has long been the most productive region in the country, may be worth considerable sums.

Table 2: Regional estimated potential opium revenues (millions of US\$) and their share of national total, 2022-2024

	2022		2023		2024	
Region	Value (US\$ millions)	Share	Value (US\$ millions)	Share	Value (US\$ millions)	Share
Central	8	1%	2	2%	2	1%
Eastern	42	3%	18	16%	18	7%
North	1	>1%	11	9%	18	7%
North-eastern	86	6%	14	12%	135	52%
Southern	59	4%	-	-	-	-
South-western	1,016	75%	58	51%	53	20%
Western	148	11%	10	9%	37	14%
National	1,360	100%	113	100%	260	100%

Estimates are rounded to nearest whole number and may not sum up.

How farmers replaced opium with other crops

With the enforcement of the drug ban, the 2023 season marked shifts in land use, with over two-thirds of the land previously allocated to opium poppy cultivation converted to cereal production, mostly wheat. The remaining land became either fallow or was utilized for summer crops. The shift towards cereal production can improve food security in the country. However, this change reduces farmer incomes, as the income generated per area unit of opium far exceeds that of wheat. Therefore, farmers adhering to the drug ban are forgoing substantial potential losses of income. Although, given market dynamics, had opium production remained unaffected by the ban in 2023 and 2024, the current opium price would likely be much lower and the price difference between opium and wheat would likely remain but not be so dramatic. Nevertheless, this economic loss is particularly acute given the profitability of opium, which offers farmers more income per hectare of cultivated land. In 2024, opium could have generated about US\$30,000 per hectare in Helmand and US\$18,000 in Badakhshan. Conversely, a hectare of a staple crop such as wheat would have generated less than US\$500^{5,6,7}, and the same area of a cash crop such as cotton around US\$1,200^{8,9,10}, while one of the most valuable licit crops, saffron, would output US\$3,600¹¹.

Between 2023 and 2024, land use patterns changed slightly. The distribution of land dedicated to cereals, summer crops, and fallow fields remained stable, with cereals continuing to dominate as the primary crop replacing opium. The amount of fallow land was lower in 2024 than it was during the peak years of opium production, representing about 5% less agricultural land cover than in previous years. Extrapolating this nationally, up to 300,000 more hectares of previously fallow land were cultivated with licit crops during the 2024 poppy cultivation period. This means that more land was under cultivation than before the drug ban came into effect. This shift in using more fallow land suggests that farmers are attempting to compensate for the loss of opium income by expanding the amount of farming land. Nevertheless, the persistence of fallow land, which still accounted in 2024 for around a third of all agricultural land, highlights ongoing challenges for farmers to exploit all available land.

The move to cultivate more crops on previously fallow land comes with its own set of risks, as over-cultivation without adequate rest periods or without the application of costly fertilizers, can lead to declining yields and soil degradation in the medium term. In the long term, this could compromise the sustainability of farming practices, as lower productivity would further reduce the already diminished incomes of farmers.

⁵ <https://apps.fas.usda.gov/psdonline/circulars/production.pdf>

⁶ <https://www.fao.org/4/al376e/al376e.pdf>

⁷ <https://www.fao.org/giews/countrybrief/country.jsp?code=AFG&lang=ar>

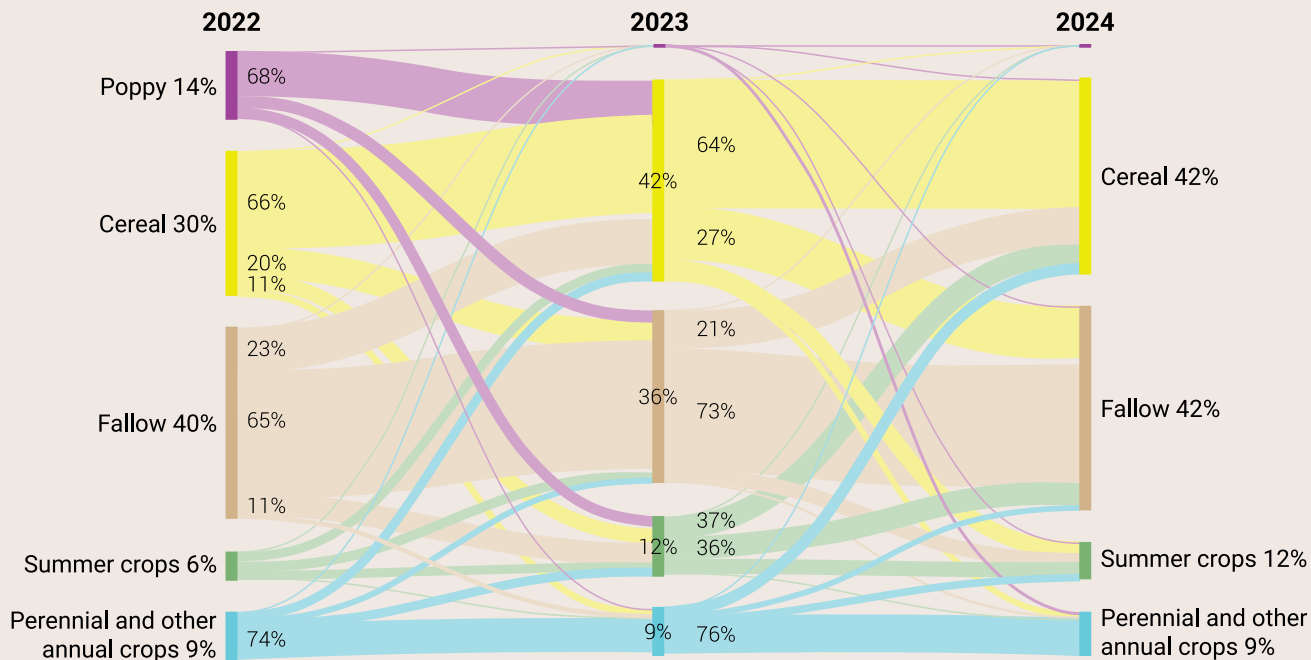
⁸ <https://statics.teams.cdn.office.net/evergreen-assets/safelinks/1/atp-safelinks.html>

⁹ Food and Agriculture Organization of the United Nations - Production: Crops and livestock products (2023)

¹⁰ Prices obtained from UNODC's field activities

¹¹ Esar Ahmad Bashir, Singh Gurlal, Younisi Hamidullah, "Afghanistan Saffron and Potential for the Economy: An Overview of International Trade and Domestic Well Being" *Agricultural Reviews*. 45(2) (2024): 297-303. doi: 10.18805/ag.RF-290

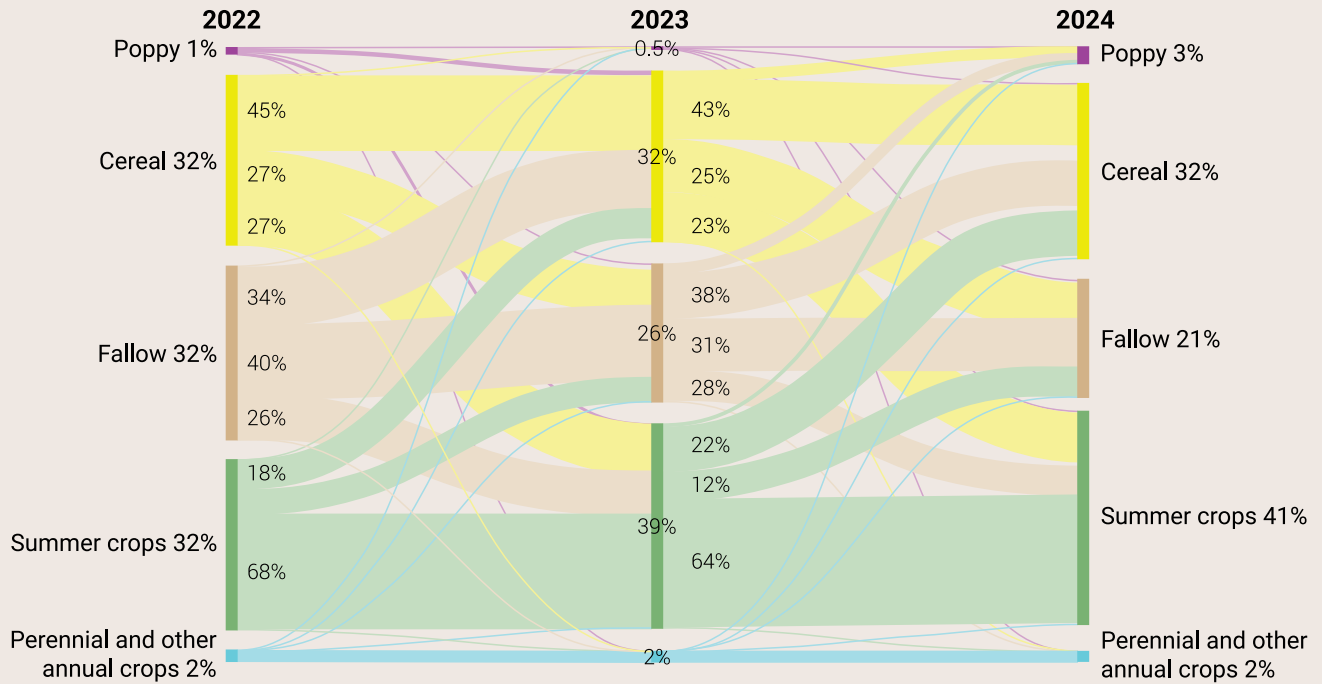
Figure 8: Land use change in Farah, Kandahar, Hilmand and Nangarhar¹²



In contrast to the national patterns, the province of Badakhshan presents a different scenario. There, land use has remained relatively stable over the years, as opium poppy has played a smaller role in the province’s agricultural landscape compared to other regions. While there has been a modest increase in the amount of land dedicated to poppy cultivation in 2024, with production levels higher than those seen in 2022, the overall scale remains limited. Only about 3% of the sampled fields in Badakhshan contained poppy in 2024, indicating that the crop still occupies a minor portion of the province’s agricultural output. However, the fact that poppy cultivation has increased in this region suggests that production could expand further, particularly if enforcement of the drug ban is less stringent or less likely to be adhered to as compared to southern provinces. Badakhshan could potentially see a further increase in poppy cultivation, contributing to a broader national shift in production

¹² In 2022 these four provinces accounted for 74% of all the opium production of the country.

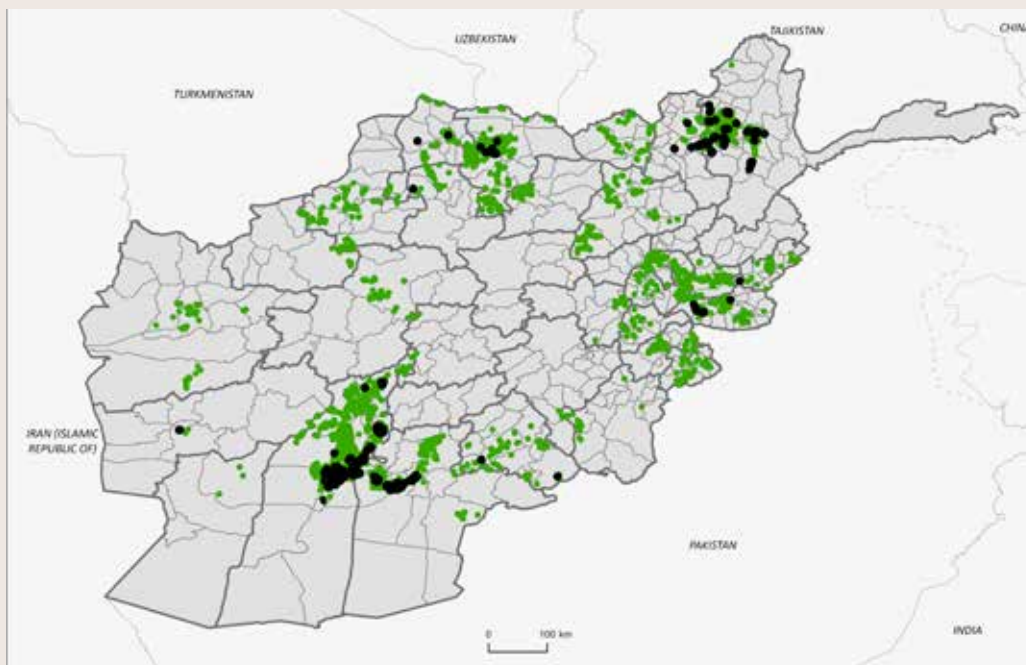
Figure 9: Land use change in Badakshan



Eradication

The De-facto Authorities provided eradication data to UNODC. These figures could not be verified by UNODC but according to the information provided by the DfA, approximately 92% of the fields reported as eradicated had undergone eradication prior to the acquisition of satellite imagery. So where eradication may have eliminated opium poppy, UNODC would not have counted it in its final estimate.¹³

Figure 10. Eradication in Afghanistan during the 2024 season as reported by the DfA



Locations of eradicated fields shared by the de facto authorities with UNODC. 'Evaluated eradication' refers to the fields that UNODC was able to evaluate, while 'Other eradication' refers to all other fields.

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¹³ The DfA has reported to UNODC the eradication of poppy fields amounting to a total of 16,000ha. UNODC could not verify the information provided by the DfA on the location and total number of hectares eradicated.

Figure 11. Eradication Efforts taking place in a closed field in Hilmand in 2024



Source: UNODC

The enforcement of the drug ban, including crop eradication, may have encountered more resistance from farmers in the North-eastern provinces¹⁴ where opium cultivation has increased. Farmers in Southern provinces may be enticed by higher farmgate prices and return to poppy cultivation. Any forceful imposition of the drug ban might provoke social and political unrest, jeopardizing fragile stability in these areas.

¹⁴ <https://www.reuters.com/world/asia-pacific/taliban-say-order-restored-after-afghan-opium-poppy-protests-2024-05-07/>

Climatic challenges

The 2024 agricultural growing season has been extremely challenging for all Afghan farmers, not just those involved in opium poppy cultivation. Analysis of weather data for Afghanistan from the European Centre for Medium-Range Weather Forecasts, shown below, suggest an increase in weather anomalies that are likely to affect agricultural activities in the country. The main opium growing season typically stretches from October to around May or June across much of provinces where opium poppy is cultivated. However, this year the weather patterns were highly unusual and could be divided into two contrasting seasons. The autumn and early winter months were characterized by severe dryness and unseasonably warm temperatures, leading to drought-like conditions (figures 12, 13). In these months, rainfed crops struggled to grow due to the lack of water.

This period of drought was followed by a dramatic shift in the weather in March, when an unseasonably cold and wet spell struck, bringing heavy rainfall to many parts of the country (figures 13, 14). This sudden change caused further issues, as the late frost and excessive rainfall may have damaged a wide variety of crops, including opium poppy, in many districts (figure 15). To make matters worse, the heavy rainfall led to catastrophic flash floods, which, according to media, killed hundreds of people and swallowed entire villages in several provinces of the northern side of the country, from Ghor to Badakhshan.¹⁵ Fields located near riverbeds were particularly vulnerable, with some completely wiped out by floods (figure 15). But the rain benefited some other agricultural fields not directly affected by the flooding, allowing crops to recover from the earlier drought and eventually grow to maturity and, in some areas, even produce above average yields¹⁶. In this way, the same weather brought devastation to some and relief to others.

On a broader climatic scale, these unpredictable weather patterns are affecting all types of crops, not just opium poppy, forcing farmers to adapt to the changing conditions. Some farmers cultivating opium poppy have begun staggering the planting of their crops at different stages (figure 16). Rainfed areas, which rely solely on natural precipitation, are particularly vulnerable to weather shifts, as they depend directly on climatic conditions for access to water. However, irrigated areas are not immune to risk either. Snow in Afghanistan's mountainous regions acts as a critical water reservoir, gradually feeding the dams and canals that sustain agriculture during the dry months of the year. Yet, the amount of snow accumulating in the mountains is declining (figure 17), which could pose a serious threat to farming in the valleys below. Without sufficient snowmelt, farmers in many areas may face challenges in the coming years, and their livelihoods could be at risk unless effective mitigation strategies are put in place.

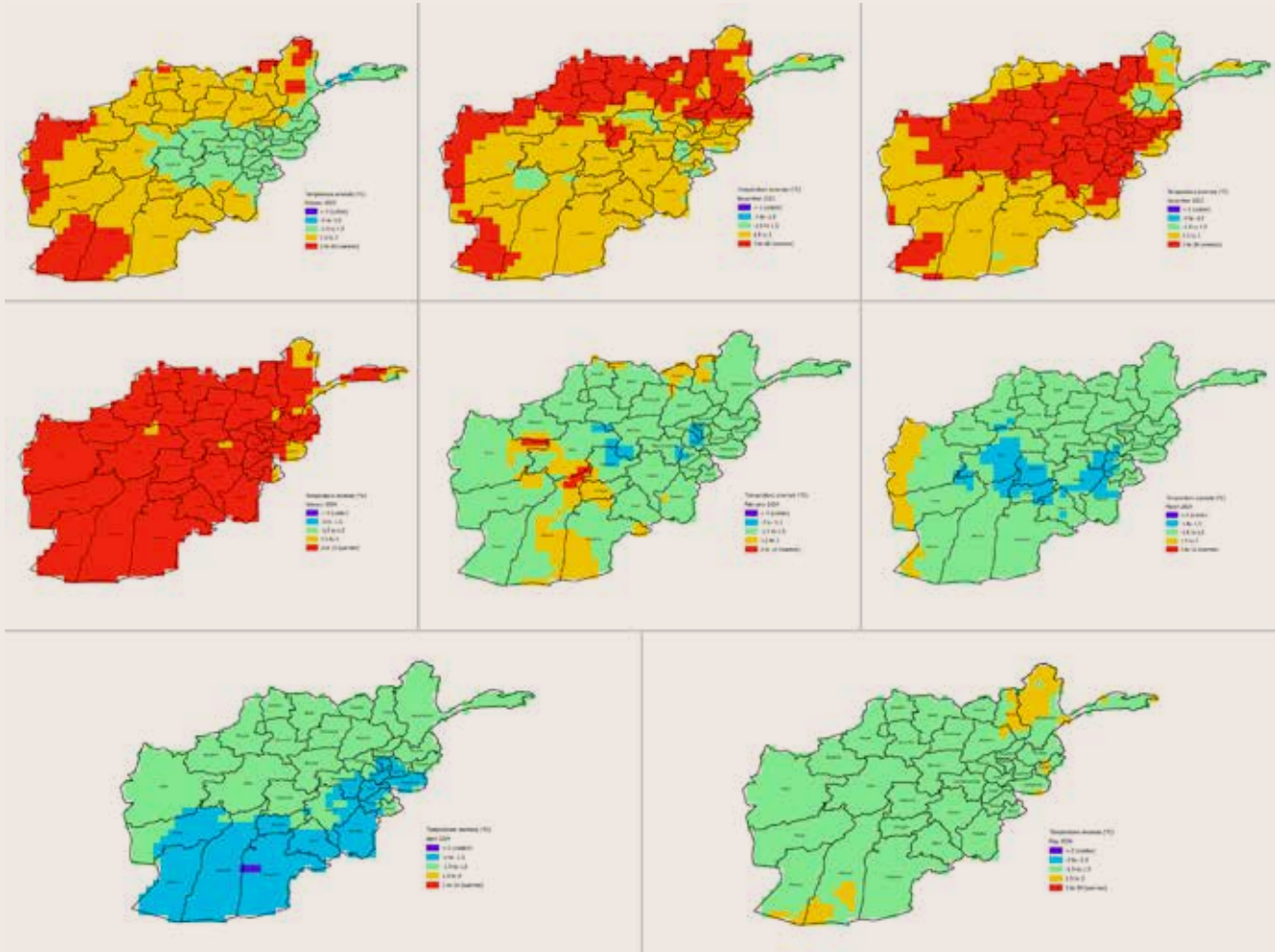
¹⁵ <https://news.un.org/en/story/2024/05/1150066>

¹⁶ <https://www.fao.org/giews/countrybrief/country.jsp?code=AFG&lang=ar>

The uncertainties brought about by climate change will require farmers to continue adapting their practices and possibly even reconsider the crops they choose to grow. As these changes unfold, opium production could also be significantly affected. Climate change could make growing poppy more difficult by altering rainfall patterns, increasing the frequency of extreme weather events, and impacting the availability of water resources. Additionally, the geographic distribution of poppy cultivation and the agricultural cycle calendar may shift, as farmers in new areas where the crop can thrive under changing conditions choose to grow it. Some farmers, struggling to make a living from licit crops in an increasingly uncertain environment, may even turn back to poppy cultivation, as it is a crop that offers a higher income. However, cultivating opium poppy also demands a great deal of water, something that could exacerbate the challenges faced by the country's water reservoirs. As climate change continues to reshape Afghanistan's agricultural landscape, both the challenges and the decisions that farmers face will become more complex, with long-term consequences for food security, livelihoods, and the illicit opium economy.

Figure 12: Temperature anomalies in Afghanistan, October 2023 to May 2024

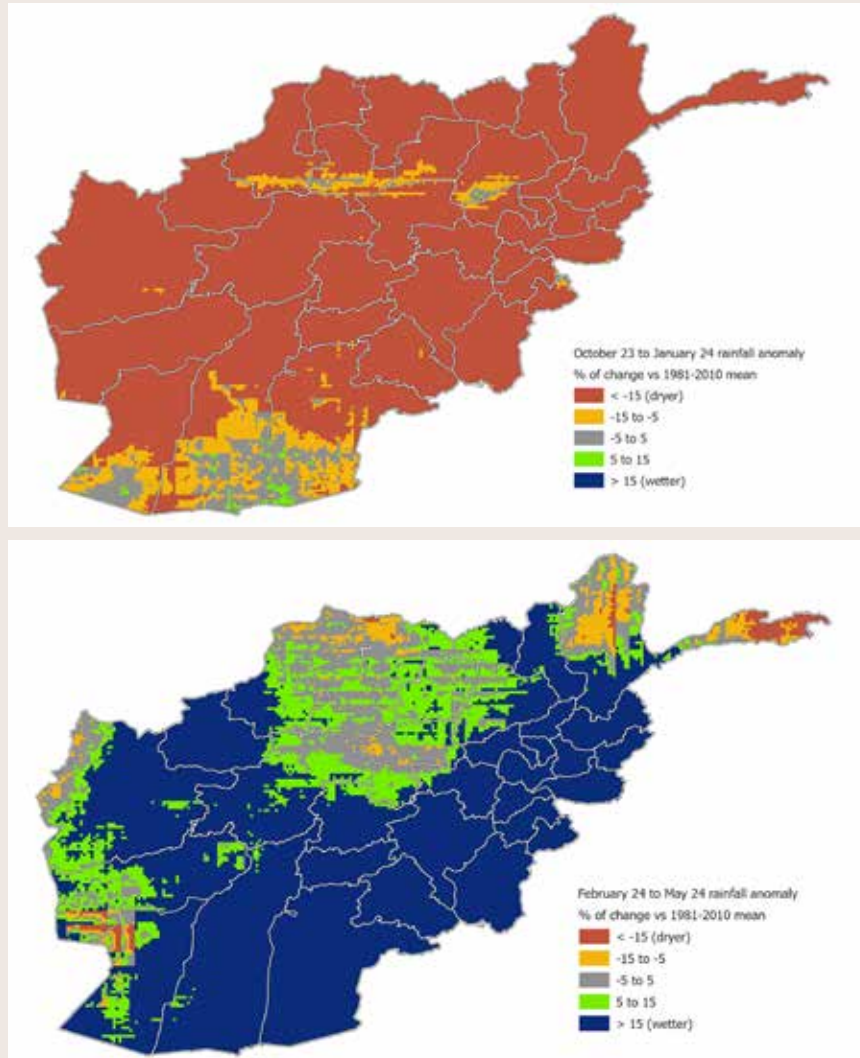
Temperature anomaly (°C) ■ <-3 (colder) ■ -3 to -1.5 ■ -1.5 to 1.5 ■ 1.5 to 3 ■ 3 to 10 (warmer)



Anomalies calculated from the 1981-2010 climatic mean using data from ECMWF.

Figure 13: Rainfall anomalies vs 1981-2010 mean in Afghanistan

October to January and February to May



Anomalies calculated from the 1981-2010 climatic mean using data from ECMWF.

Figure 14: Poppy crops affected by late frost in 2024, before and after

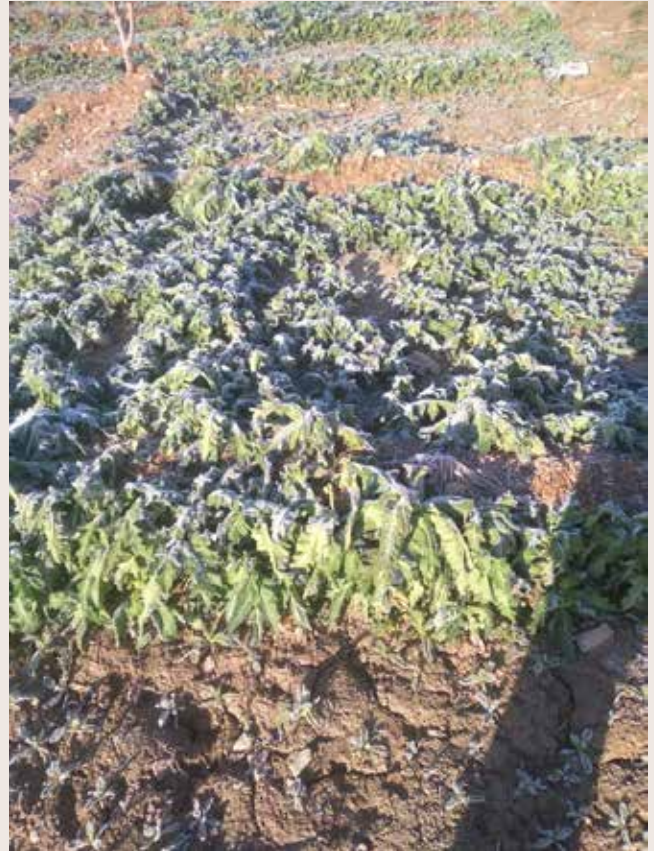


Figure 15: Satellite images comparison before and after the catastrophic flooding in Ghor in 2024

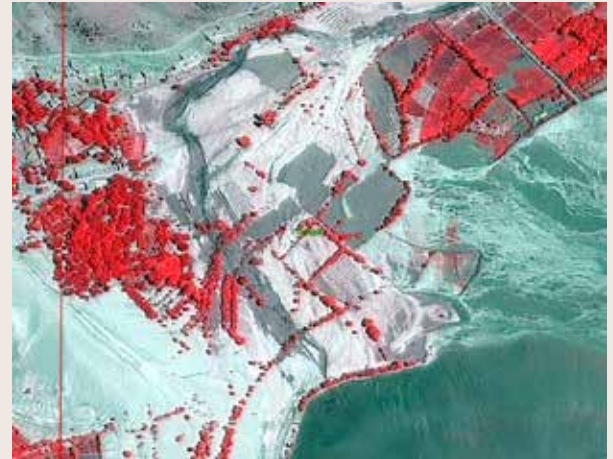
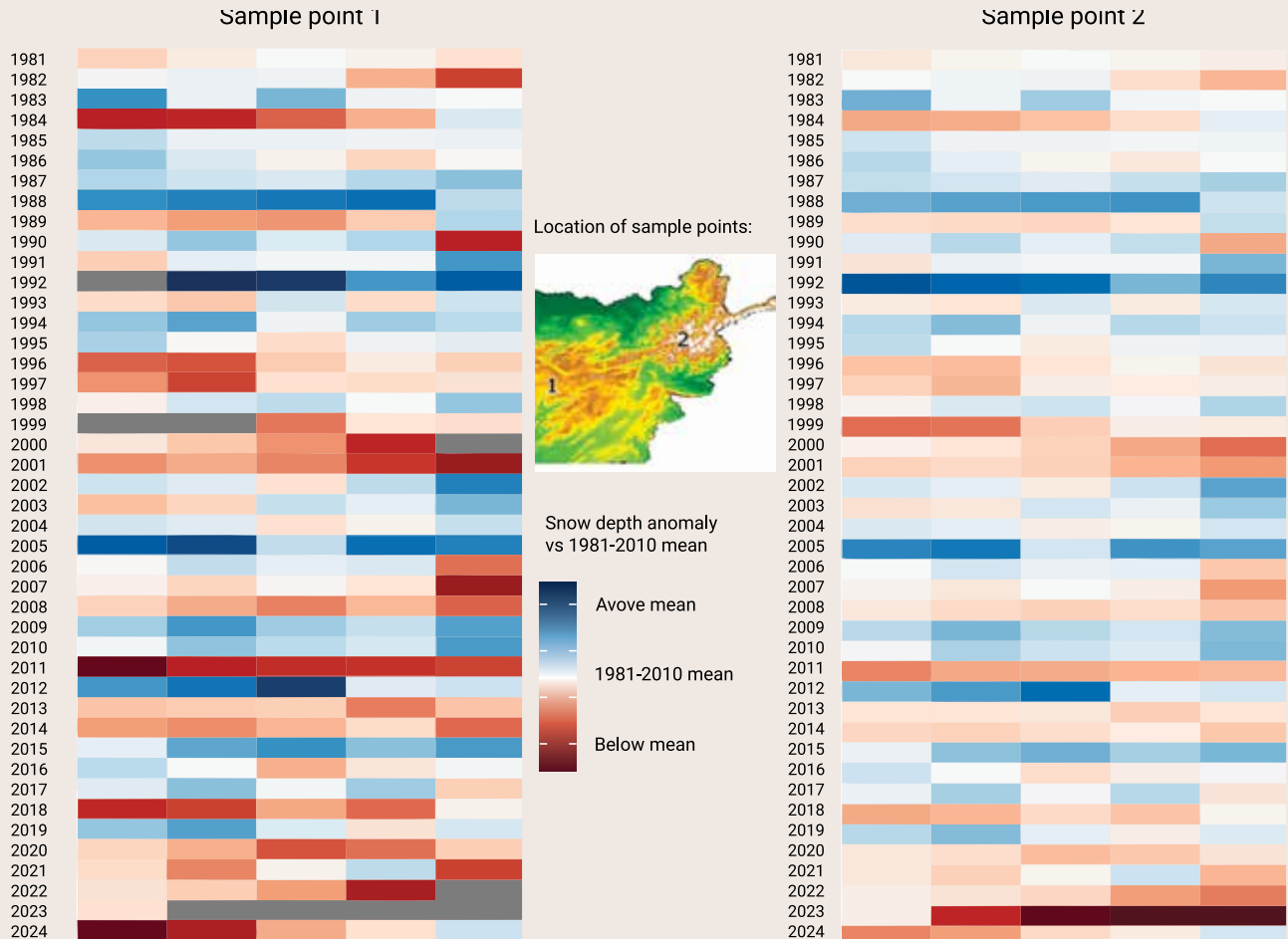


Figure 16: Neighbouring and concurrent poppy fields at different stages of growth



Figure 17: Snow depth anomaly in two key water divides in Afghanistan (1981- 2024)



Sample point 1 is located at the water divide between the Hilmand, Hirat and Northern rivers (34.3342, 66.4989, 3,260m aslm). Sample point 2 is located at the water divide between the Kabul river and the Amu Darya basins (35.8578, 70.2894, 4,950m amsl) Anomalies calculated from the 1981-2010 climatic mean using data from ECMWF

Poppy cultivation within the broader region

Afghan opium production has long been intertwined with global drug markets, fueling the supply chains for heroin that extend far beyond its borders. However, as the dynamics of drug production and trafficking continue to evolve, this narrative may be oversimplifying a more complex regional pattern.

The current high prices of wholesale quantities of opium and heroin could encourage production not only inside Afghanistan but also in countries neighboring Afghanistan. Existing connections between smuggling networks and ethnic ties across the region could facilitate the expansion of opium poppy cultivation outside of traditional areas inside Afghanistan¹⁷. This would represent a significant shift, as Afghanistan has historically been the global dominant supplier of opiates.

In addition to unconfirmed media reports, recent responses from member states in the region have noted rising poppy cultivation. For example, data submitted to UNODC by the Government of Pakistan show that opium poppy cultivation and eradication has risen in Pakistan from 27 hectares in 2020 to 380 hectares (about 340 of which were reportedly eradicated) in 2023. Poppy eradication has increased in India as well, from 4,358 hectares in 2020 to 5,583 hectares in 2022¹⁸, although developments in India are hard to assess given that the country maintains licit poppy cultivation. Reports of eradication efforts and laboratory dismantling initiatives in Kazakhstan, Kyrgyzstan and Uzbekistan suggest that some countries are taking steps to address the problem. Law enforcement agencies in neighbouring countries of Afghanistan continue seizing and combatting illicit drugs¹⁹, suggesting that countries across the region are concerned about shifting supply patterns and activities.

¹⁷ <https://www.crisisgroup.org/sites/default/files/2024-09/340-afghanistan-opium-fields.pdf>

¹⁸ Analysis of ARQ data.

¹⁹ <https://dmp.unodc.org/index.php/brief6-public>

ANNEX

ISLAMIC EMIRATE OF AFGHANISTAN MINISTRY OF INTERIOR AFFAIRS DIRECTORATE OF SECURITY COOPERATION AND BORDER AFFAIRS

Number: 498

Date: 1446 for this: 10/05/1446

In the name of Allah, the Most Gracious, the Most Merciful

The Ministry of Foreign Affairs of the Islamic Emirate of Afghanistan presents its compliments to the United Nations Office on Drugs and Crime (UNODC), in Kabul. Reference to your letter No. ODC/AFG/2024/070, dated 28 October 2024, and our follow-up letter No. 433, dated 7 /4/1446, the Ministry respectfully submits the following:

The Deputy Ministry of Counter Narcotics has reviewed the UNODC's draft report on poppy cultivation in Afghanistan for 2024, and submitted its comments attached in three pages.

With this note, we express our appreciation to the UNODC for incorporating these comments into the final report.

The Ministry of Foreign Affairs takes this opportunity to renew its assurance of high consideration.

TECHNICAL COMMENTS OF THE NARCOTICS SURVEY AND ANALYSIS DEPARTMENT (NSAD) ON UNODC REPORT

Methodology Section:

In this section for the 2024 opium production estimation, various sources were referenced, including Remote Sensing (RS) surveys, villages' survey, international sources, and surveys from previous years indicated.

- Estimating opium production ideally requires a physical presence in the field, conducting a fully technical survey, and considering different categories of poppy-cultivated land based on land quality. However, such a survey has not been conducted in recent years.
- Additionally, the village survey, listed as a source for opium production estimation, has not been carried out in the past four years by the UNODC.
- All other international sources without a physical presence in poppy cultivation areas are not considered reliable for this estimation.
- The reliance on data from past surveys is also concerning, as recent changes, particularly the import and use of improved poppy seeds, have significantly altered the ground reality.

Opium Production Section:

- The estimation presented in this section indicates a 30% increase in opium production in 2024 compared to 2023. This estimate, however, does not account for the eradicated poppy areas—achieved at great financial and human cost. Subtracting the eradicated poppy areas from the 2024 figures would reveal a significant decrease in estimated opium production.
- We previously provided detailed feedback on poppy cultivation estimates in our comments on the first report of these series, which play a crucial role in the accuracy of 2024 production figures.
- Findings from the village survey by the Deputy Ministry of Counter Narcotics indicate a significant increase in per-hectare opium production, yet the UNODC's estimation relies on outdated data from previous years.

Converting Opium to Heroin Section:

The UNODC report estimates a conversion rate of 9 to 14 kilograms of opium for each kilogram of heroin. However, with the use of improved poppy seeds and various fertilizers, farmers have increased opium production, though the opium quality has declined compared to previous years. As a result, more opium is now required to produce one kilogram of heroin than in the past.

This shift in quality suggests that traditional calculation formulas for opium and heroin production need to be updated to reflect current realities. Conducting related surveys would help provide more accurate information.

Price Trends:

According to the monthly drug price surveys by the Narcotics Survey and Analysis Directorate (NSAD), since 2021, opium prices have shown significant fluctuations due to reduced availability in the markets. Our findings indicate that opium prices have multiplied compared to previous years.

Unfortunately, the figures presented in your report do not align with current field data. The omission of poppy eradication figures further skews revenue calculations.

For an accurate estimation of Afghanistan's opium revenue, we recommend the following steps:

1. A realistic estimation of poppy cultivation areas.
2. Subtracting eradicated poppy areas from the total estimated cultivation area.
3. Gathering precise price data through field surveys.
4. Calculating total revenue based on these data.

Alternative Cultivation to Poppy Section:

NSAD's poppy cultivation and village survey results show that, following the decree of His Highness Amir al-Mu'minin, farmers across Afghanistan have widely replaced poppy with alternative crops, such as wheat, tomatoes, potatoes, onions, maize, beans, watermelons, melons, cotton, chickpeas, sesame, rice, saffron, mustard and sugarcane. Additionally, many farmers have begun cultivating fruit-bearing trees like apples, almonds, pomegranates, and grapes but the UNODC report mentions only wheat and cotton as alternatives.

Finally, a notable discrepancy has been observed between field data and revenue estimates per hectare for poppy and legal crops (wheat and cotton).

Respectfully

