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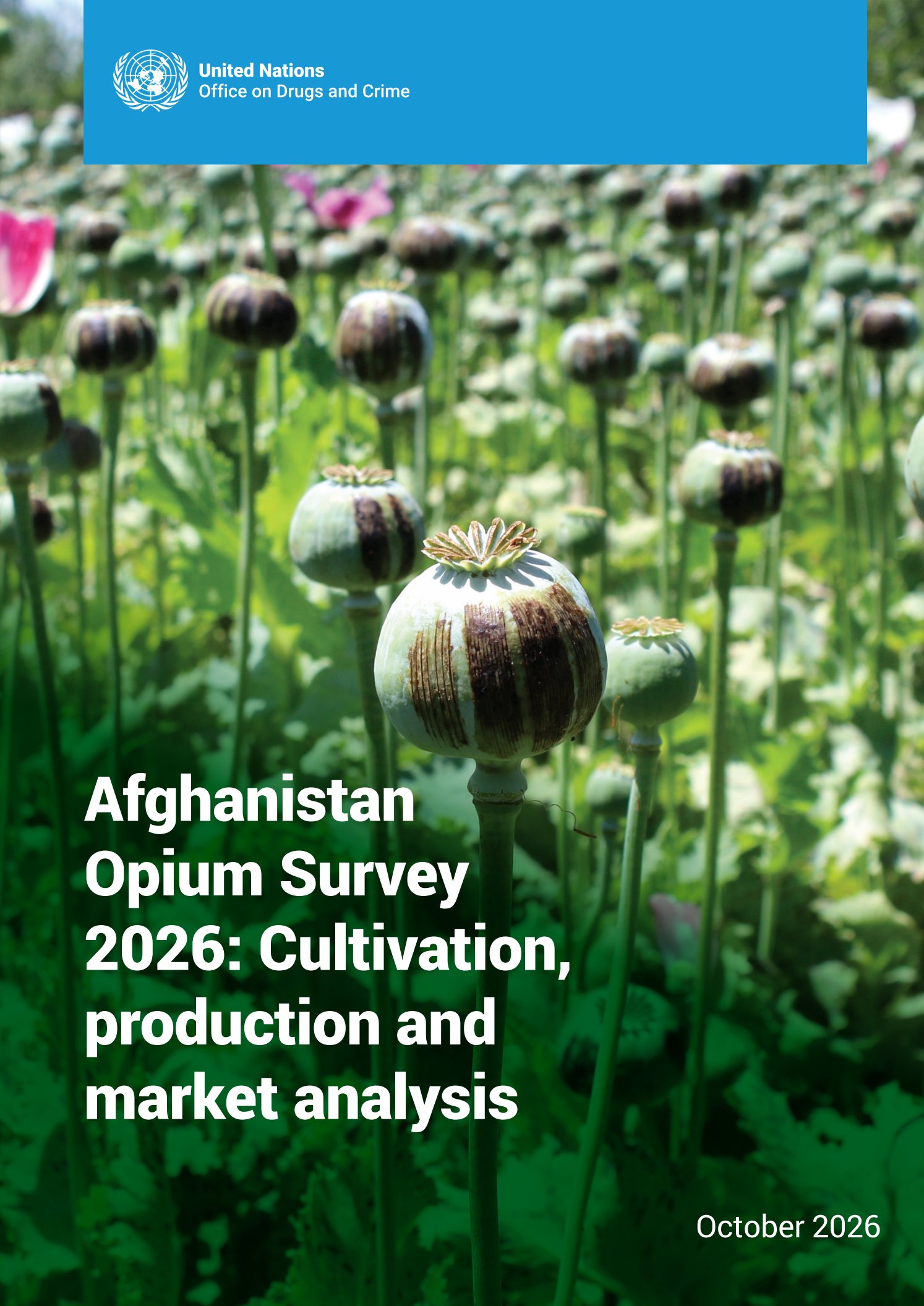

Afghanistan Opium Survey 2026: Cultivation, production and market analysis

October 2026

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Mandates

The opium surveys are being implemented within the technical framework of the UNODC Illicit Crop Monitoring Programme (ICMP), established in 1999 upon request of the Commission on Narcotic Drugs in its resolution 42/3, Monitoring and verification of illicit cultivation. The objective of ICMP is to assist the international community in monitoring the extent and evolution of illicit crops and to compile reliable and internationally comparable data. Currently, UNODC carries out and supports monitoring activities in the following countries affected by illicit crop cultivation: coca surveys in Bolivia, Colombia, and Peru; and opium poppy surveys in Afghanistan, Mexico and Myanmar. ICMP is part of UNODC's Research and Trend Analysis Branch.

Acknowledgements

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KEY TAKEAWAYS

In 2026, the drugs ban in Afghanistan appears to be weakening. Although estimated cultivation remains well below pre-ban levels, it increased sharply from around 10,000 hectares in 2025 to more than 43,000 (32,000 – 61,000) hectares in 2026. There are now 16 out of 34 provinces – five more than in the year before – that saw poppy cultivation. At 76 per cent of total area, cultivation continues to be concentrated in the North-East, specifically in Badakhshan. Estimated national opium production increased from about 300 tons in 2025 to just under 1,500 (800 - 2,400) tons in 2026.

Despite lower production volumes, the total income from harvested opium sales has recovered to the pre-ban levels and remains an attractive source of income for farmers, traders, and other actors involved in the opiate economy. Within Afghanistan, opium generated an estimated USD 525 million for traders in 2026, comparable to the 2018–2021 average but still well below peaks recorded in years such as 2017 and 2022. Although prices for dried opium have declined from last year, averaging around USD 570 per kilogram in 2025 and USD 500 per kilogram in 2026, they remain substantially above pre-ban levels of less than USD 100 per kilogram, contributing to higher overall revenues despite reductions in total production.

To contextualize this, total estimated income from opium sales constitutes a sizable share of Afghanistan's economy, equivalent to 2.7 per cent of national GDP or 8.5 per cent of the agricultural sector. In comparison, farmers' income between 2018 and 2021 was estimated at between 1.8 and 3.3 per cent of Afghanistan's total economy. None of these estimates capture the additional value generated through subsequent processing, trafficking, exporting or any other activities further along the supply chain. In short, the opiate economy remains an important economic activity in the country.

Farmers adapted to perceived or actual enforcement pressures. Small poppy plots have been hidden within cereal fields, cultivated inside walled compounds, and planted and harvested at staggered times to reduce risks of detection, eradication, and adverse weather conditions. In Hilmand, where cultivation rose to 3,500 hectares, over 90 per cent of opium poppy fields were concealed, with over 50 per cent inside cereal fields and over 40 per cent inside walled areas.

Large regional differences in trader prices suggest that Afghanistan's opium market has not yet stabilized and may encourage substantial internal trafficking. That is, some individuals or groups may try to buy opium from the North-Eastern region, where most cultivation takes place and opium prices are lowest, and resell it in regions where the price may be double, such as in the South-West. The internal opium market could therefore play an important role in local economies, with some trafficking networks finding lucrative opportunities. It may also incentivize migration for cultivation or harvesting, as has been documented in the past.

Seizure data reported to UNODC suggest that opiate trafficking in the region, although becoming less in recent years, has remained resilient despite the drugs ban. The most likely explanation is the clearance of stocks during periods of low productivity. While pre-ban opium stocks have mitigated the severe disruption in supply from cultivation, they may have become increasingly depleted – UNODC estimated that opium stocks in Afghanistan could have lasted through 2025 or 2026. Supply from countries other than Afghanistan could have also contributed to continued trafficking.

At the same time, opium prices in Afghanistan increased sharply following the ban, allowing traffickers to release stocks gradually while making large profits. If these stocks are now largely exhausted, there may be a strong incentive to resume poppy cultivation. For farmers, many of whom were unable to accumulate large stocks and continue to face severe economic hardship, opium cultivation may remain one of the few available sources of income, providing reason to grow despite the enforcement risks.

Taken together, these factors could contribute to a renewed increase in opium poppy cultivation and heroin trafficking beyond 2026. However, the extent of this will depend on whether the market stabilizes at relatively low production and high prices, or returns to higher production and lower prices; on whether demand in destination markets declines, remains stable, or increases again; on the emergence of new consumer markets and alternatives to heroin; and on the extent to which opiate production in other countries is able to meet global demand.

Besides opiates, methamphetamine is also trafficked in the region. In contrast to opiates, seizure cases in the wider region have not shown strong signs of a decline since the drugs ban, pointing towards sustained supply. What share of this supply originates in Afghanistan or elsewhere is still not precisely understood.

Continued monitoring of cultivation, production, prices and trafficking in Afghanistan, together with demand and market trends, including data on local prices and purities, in destination countries, will be critical to determine whether the recent increase in cultivation is a temporary adjustment or the start of a resurgence in opium production and heroin trafficking.

POLICY IMPLICATIONS

The survey findings have implications for four policy areas: addressing cultivation through alternative development, countering trafficking and organized crime, reducing demand for opiates in destination markets, and strengthening monitoring of illicit drug production in Afghanistan and the wider region. Across these areas, the overarching objective should be to support a sustainable transition from illicit to licit economic activities in a context of reduced development resources, trade disruptions, large-scale returns and persistent economic vulnerability.

Alternative development addresses the root causes of illicit crop cultivation and can only be effective when licit livelihoods are economically competitive with opium cultivation.

- This requires moving beyond crop substitution towards a broader local economic development approach combining agriculture, employment creation, skills development, access to finance and business development services, vocational training, infrastructure and private-sector engagement.
- *Access to markets*, including export markets, is paramount; local demand alone is often insufficient to incentivize a shift away from poppy cultivation. Interventions should also improve post-harvest management, quality standards, certification, storage, cold-chain logistics, processing and export readiness, while diversifying access to domestic, regional and international markets to reduce exposure to border closures and market disruptions.
- Targeted *infrastructure investments* such as irrigation systems, greenhouses and low-cost storage facilities can strengthen the viability of legal agricultural livelihoods. These should, where feasible, be complemented by investments in electricity, transport connectivity and other productive infrastructure.
- Enhanced *technical assistance* enables farmers to meet quality standards to access higher-value markets. Alternative development interventions should also be designed around the economic needs of the whole household, including opportunities for women and other household members, to diversify income sources and strengthen household resilience.
- A strong focus is needed on areas where cultivation is greatest or at greatest risk of resuming, such as Badakhshan, Takhar, Hilmand, and Kandahar as well as on households facing economic vulnerability, climate-related risks, and limited legal income opportunities. Interventions should be tailored to provincial and district conditions, including water availability, climate, terrain and market potential, and geographic priorities should be periodically reviewed as cultivation patterns shift.
- Long-term, predictable and flexible funding is needed because sustainable reductions in illicit cultivation require *sustained investments*. Evidence indicates that short-term interventions are unlikely to generate lasting change when licit alternatives remain less profitable than illicit crops.
- Coordination and programme consolidation across all implementing entities improve efficiency and scale. In the context of the Doha Process and its Joint Action Plan on Alternative Development, stronger coordination among donors is essential to ensure that limited resources are used efficiently and strategically, especially under current international funding cuts.

Supply-side measures should target the full drug trafficking chain, including production, trafficking networks, precursor diversion and associated criminal activities, rather than relying solely on eradication, interdiction and seizures.

- Strengthening *data collection*, intelligence-sharing and early-warning systems improves operational effectiveness. This needs to include forensic capacity to analyse the origin and production methods, especially of methamphetamine trafficked in the region.
- Considering the large profits from drug trafficking, *financial investigations* should be systematically integrated into international drug trafficking investigations to identify, trace and disrupt illicit financial flows (IFFs) and deprive criminal networks of the proceeds of crime.
- Supply reduction strategies should *account for displacement* effects, as enforcement can shift cultivation, production and trafficking to new areas. This is particularly relevant to the potential and likely spread or displacement of poppy cultivation beyond Afghanistan and the risk of relocation of methamphetamine production within the region.
- Regional law-enforcement and border-management cooperation should be strengthened, including efforts to control precursor movements and improve cooperation along major trafficking routes.

Reducing demand for opiates and methamphetamine in destination markets is essential to weakening the economic incentives behind drug trafficking.

- Large profit margins that incentivize drug trafficking and high demand for drugs in destination markets continue to serve as important drivers. Evidence has shown that successfully *reducing demand* can reduce the supply of drugs. Evidence-based prevention, treatment, care, and harm-reduction services should therefore complement supply-reduction interventions.
- Illicit drug trafficking therefore remains a *shared international responsibility* requiring coordinated, balanced and comprehensive action by all Member States to address its root causes through development, health, and law enforcement responses.

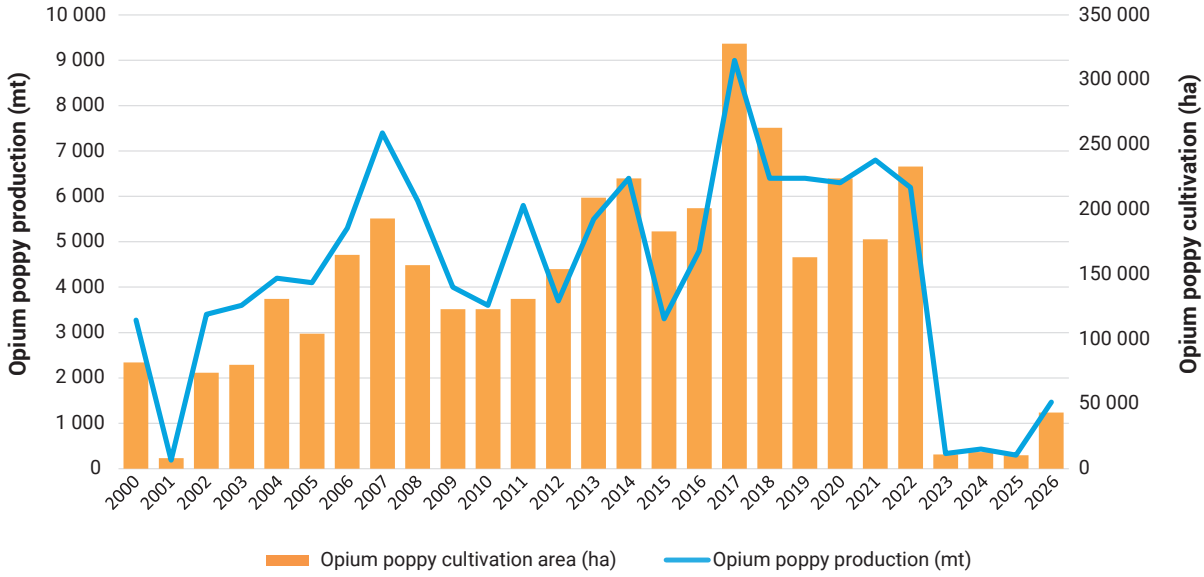
There remain **severe information gaps** for understanding the direction the global opiate market will take.

- *Continued monitoring* is needed to assess how the drug ban is reshaping opium, heroin and methamphetamine markets within and around Afghanistan. Remote sensing combined with ground information provides a robust approach for measuring changes in cultivation patterns and heroin manufacture. Evaluating the impact of alternative development (AD) interventions is crucial to implement programmes effectively.
- The data available show continued methamphetamine and opiate trafficking in the wider region but preclude strong attribution of the drug's origin in all cases. Monitoring, including through forensic analysis of seizures to determine purity, production inputs, or other unique signatures, will be essential to understand spillover effects of potential poppy cultivation and methamphetamine manufacture to other countries.
- Further information is also required to strengthen opium production estimates, including updated information with ground truthing as to the morphine content of opium poppy as well as better information on heroin conversion, including the use of alternative precursors or techniques, in clandestine settings that could portend more efficient processing.
- Analysis of illicit financial flows is needed to understand who benefits from the drug economy and how profits are distributed within and beyond Afghanistan. This analysis should also inform financial investigations and improve understanding of how drug-economy profits are distributed across farmers, intermediaries, and higher-level trafficking networks.

OPIUM POPPY CULTIVATION

After three unprecedented years of very little opium poppy cultivation and production in Afghanistan, area under cultivation increased sharply from an estimated 10,000 hectares in 2025 to more than 43,000 hectares in 2026 (95 per cent confidence interval (CI) of 32,000 to 61,000 hectares). While still below the pre-ban levels where the area under cultivation could surpass 200,000 hectares, this sharp upward trend is a reversal of three years of low productivity.

FIGURE 1. ESTIMATES OF OPIUM PRODUCTION (TONS) AND OPIUM POPPY CULTIVATION (HECTARES) IN AFGHANISTAN, 2000–2026



Opium poppy cultivation further spread across the country. In 2026, opium poppy was present in 16 out of 34 provinces – 5 more than in the year before. Cultivation in Balkh, Day Kundi, Farah, Herat, Laghman and Nangarhar has increased such that they are no longer considered poppy-free.[1] Only one province became poppy-free in 2026, Zabul. Out of those provinces with opium poppy cultivation, only Kunar and Faryab declined in the estimated area under cultivation. In the remaining 13, estimated opium poppy cultivation increased, at times substantially.

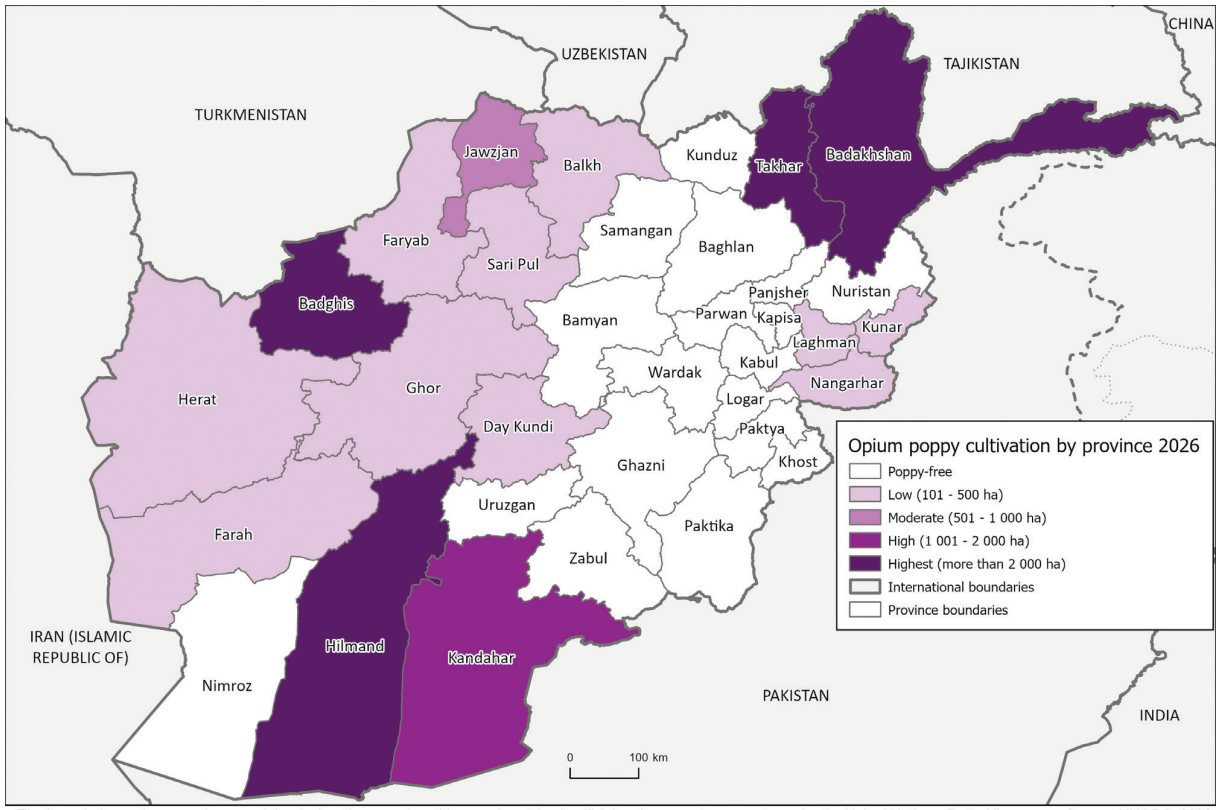
The North-Eastern region has further consolidated as Afghanistan's main opium-poppy-cultivating area since the ban came into effect in 2023, replacing the South-Western region. In 2026, it accounted for 76 per cent of the country's total area and most of the absolute year-on-year increase. Estimates increased from just under 7,000 hectares to nearly 33,000 hectares, largely because of expansion in Badakhshan and Takhar provinces. The increase in the North-East outpaced increases in other parts of the country, including the South-Western region. Although estimated cultivation

1 Provinces with an opium poppy cultivation estimate below 100 ha are considered poppy-free provinces.

in the South-West increased from approximately 1,300 hectares in 2025 to just over 5,000 hectares in 2026, it remained far below pre-ban levels. Overall, three out of every four hectares of poppy cultivated in Afghanistan in 2026 were in the North-East, confirming the region's continued dominance.

Eradication efforts also continued to generate local resistance. In May and June 2026, attempts to eradicate opium poppy in some of the main opium-producing districts in Badakhshan triggered protests and clashes between residents and security forces, resulting in several deaths and injuries.[2] Local media reported that some protesters supported the eradication of poppy but objected to the methods used and damage to other crops and property during operations.[3] The De-facto Authorities (DfA) reported a national eradication figure of around 22,000 ha. UNODC could not technically verify the information provided by the DfA. Considering that in previous years most eradication usually took place before the satellite survey, it is not expected that the results will affect the area estimates. A more detailed analysis will be provided in an upcoming UNODC publication.

FIGURE 2. OPIUM POPPY CULTIVATION BY PROVINCE, 2026

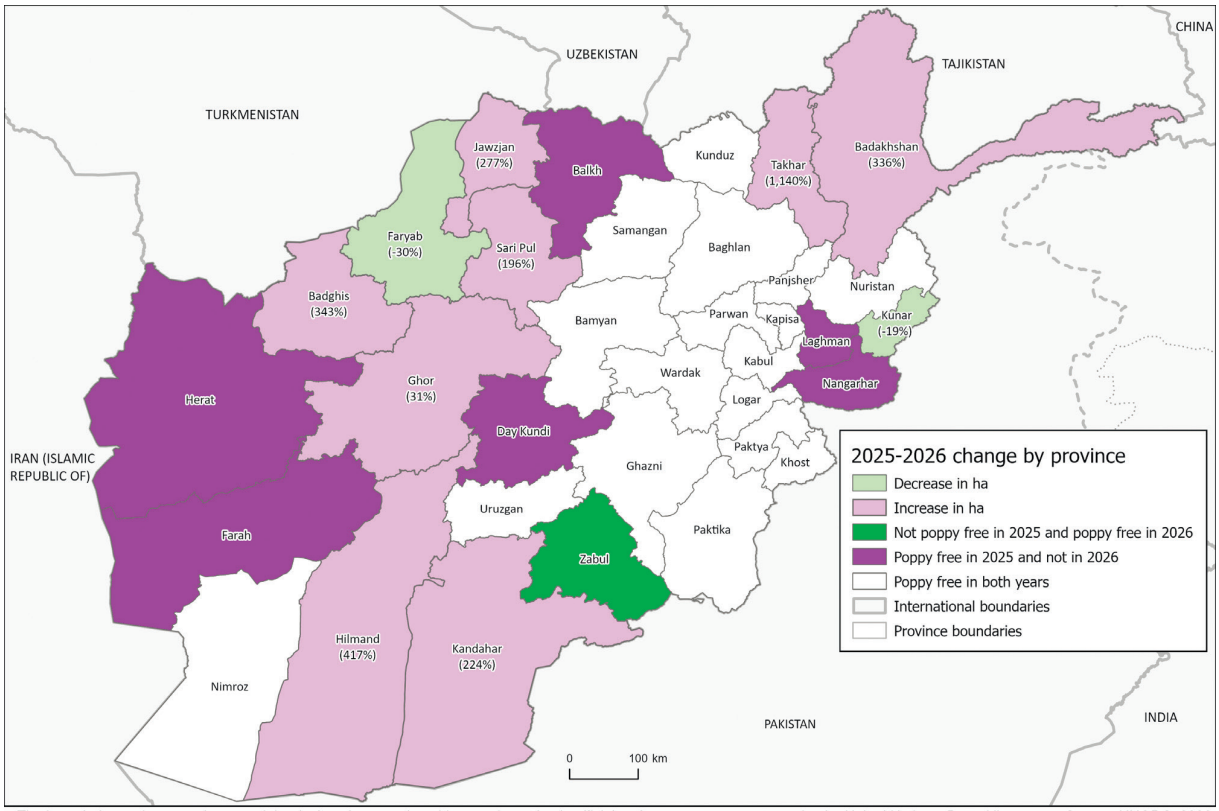


The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations. Dotted line represents approximately the Line of Control in Jammu and Kashmir agreed upon by India and Pakistan. The final status of Jammu and Kashmir has not yet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

Source: UNODC, 2026

2 United Nations Assistance Mission in Afghanistan. (2026, July 28). Update on the human rights situation in Afghanistan: April–June 2026. United Nations.
3 TOLOnews. (2026, May 9). Local Badakhshan officials visited Argo to hear demands. TOLOnews https://www.tolonews.com/afghanistan-188662.

FIGURE 3. CHANGE IN OPIUM POPPY CULTIVATION BY PROVINCE, 2025–2026



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Source: UNODC, 2026

FIGURE 4. REGIONAL SHARES OF NATIONAL OPIUM POPPY CULTIVATION AREA, BY YEAR

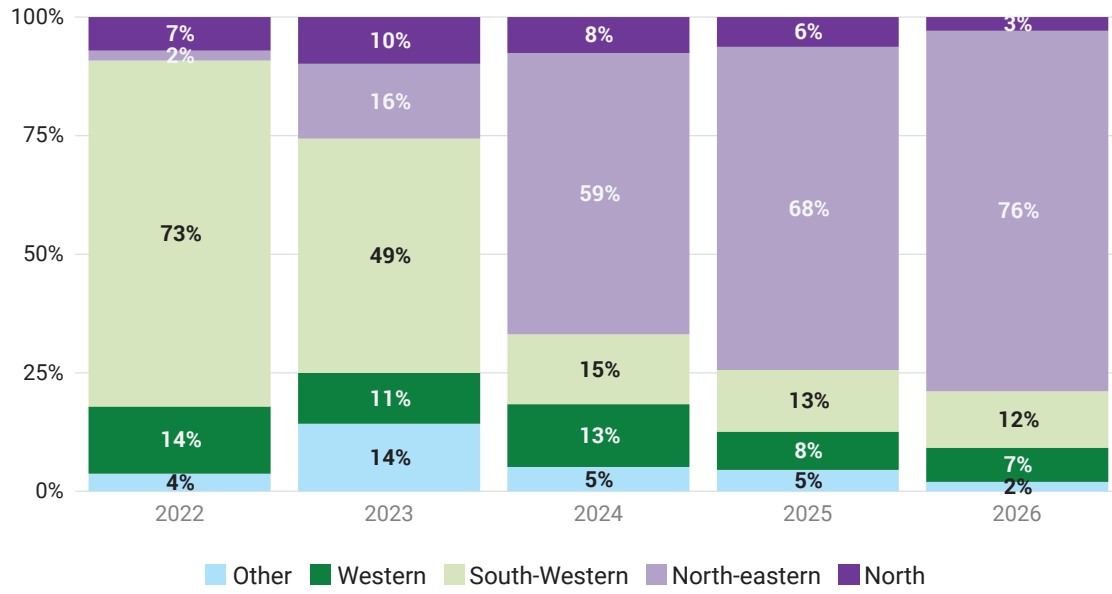
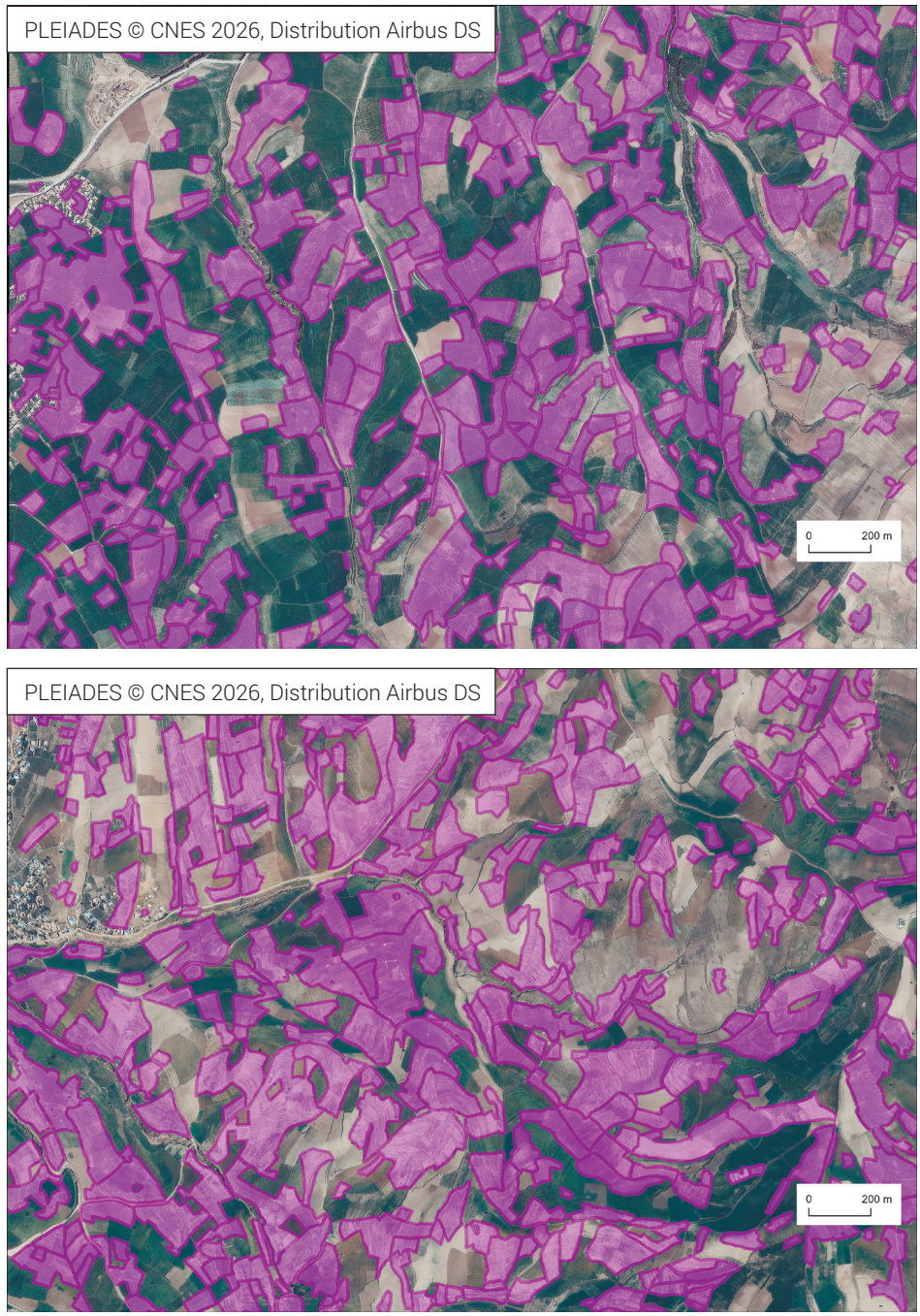
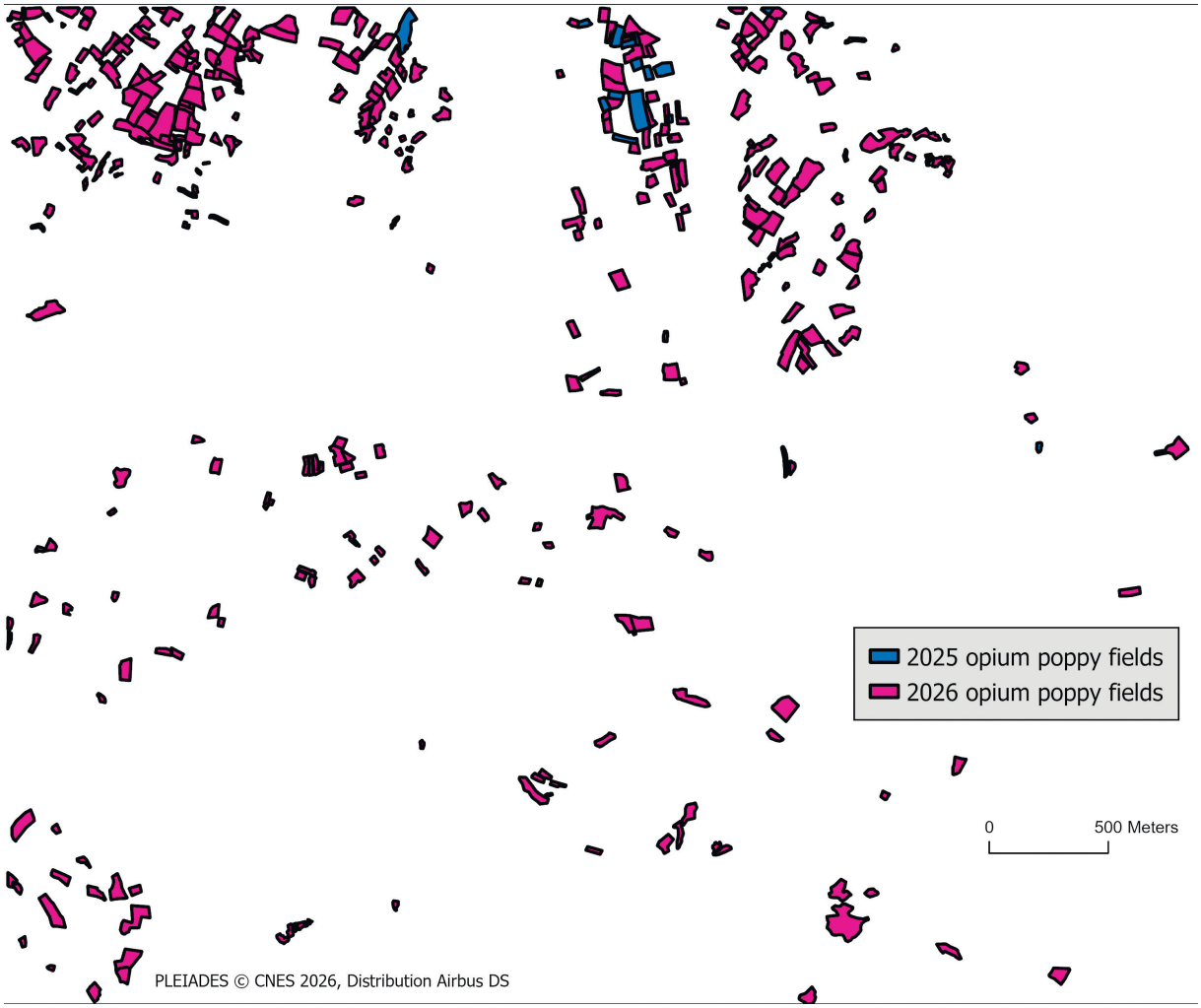


FIGURE 5. IN SOME LOCATIONS, ESPECIALLY IN BADAKHSHAN, OPIUM POPPY FIELDS (PURPLE) ARE THE MOST COMMON CROP



Source: UNODC Analysis

FIGURE 6. TAKHAR HAS SEEN THE LARGEST POPPY CULTIVATION INCREASE IN RELATIVE TERMS, WITH SOME AREAS IN THE PROVINCE EXPERIENCING VERY LARGE EXPANSIONS BETWEEN 2025 AND 2026.



Source: UNODC Analysis

TABLE 1: OPIUM POPPY CULTIVATION (HECTARES) BETWEEN 2021 AND 2026, BY PROVINCE.

PROVINCE	Cultivation 2021 (ha)	Cultivation 2022 (ha)	Cultivation 2023 (ha)	Cultivation 2024 (ha)	Cultivation 2025 (ha)	Cultivation 2026 (ha)	Change 2025-2026
Bamyan	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Day Kundi	792	837	Poppy-free	Poppy-free	Poppy-free	321	To poppy
Kabul	216	216	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Kapisa	216	184	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Logar	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Panjshir	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Parwan	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Wardak	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Central Region	**1,223**	**1,236**	**Poppy-free**	**Poppy-free**	**Poppy-free**	**355**	**To poppy**
Kunar	626	822	364	238	252	205	-47ha (-19%)
Laghman	987	1,102	435	290	Poppy-free	102	To poppy
Nangarhar	2,027	5,241	530	Poppy-free	Poppy-free	197	To poppy
Nuristan	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Eastern Region	**3,639**	**7,165**	**1,329**	**528**	**252**	**503**	**251ha (22%)**
Badakhshan	3,561	4,305	1,573	7,408	6,639	29,482	22,843ha (344%)
Baghlan	188	615	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Kunduz	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Takhar	Poppy-free	Poppy-free	Poppy-free	155	274	3,401	3,127ha (1,140%)
North-Eastern Region	**3,750**	**4,920**	**1,573**	**7,563**	**6,913**	**32,935**	**26,022ha (374%)**
Balkh	2,177	4,542	132	181	Poppy-free	136	To poppy
Faryab	4,778	6,929	532	565	304	212	-92ha (-30%)
Jawzjan	708	1,359	Poppy-free	153	146	550	404ha (277%)
Samangan	141	132	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change

Sari Pul	1,975	3,454	318	Poppy-free	116	345	229ha (196%)
Northern Region	**9,780**	**16,415**	**983**	**899**	**566**	**1,247**	**681ha (95%)**
Hilmand	109,778	122,045	142	757	681	3,525	2,844ha (417%)
Kandahar	16,971	29,229	3,544	884	481	1,558	1,077ha (224%)
Nimroz	2,304	2,429	102	Poppy-free	Poppy-free	Poppy-free	No change
Uruzgan	9,746	14,557	647	115	Poppy-free	Poppy-free	No change
Zabul	980	1,531	882	118	132	Poppy-free	To poppy-free
South-Western Region	**139,780**	**169,791**	**5,316**	**1,874**	**1,294**	**5,145**	**3,851 (289%)**
Khost	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Ghazni	127	163	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Paktya	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Paktika	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	Poppy-free	No change
Southern Region	**127**	**163**	**Poppy-free**	**Poppy-free**	**Poppy-free**	**Poppy-free**	**No change**
Badghis	4,904	14,110	368	1255	573	2,538	1,965ha (343%)
Farah	11,461	15,829	127	196	Poppy-free	240	To poppy
Ghor	1,451	1,784	647	228	183	241	58ha (31%)
Herat	290	1,337	Poppy-free	Poppy-free	Poppy-free	109	To poppy
Western Region	**18,107**	**33,059**	**1,142**	**1,679**	**756**	**3,127**	**2,371ha (279%)**
Total (rounded)	**177,000**	**233,000**	**10,800**	**12,800**	**10,200**	**43,300 (32,000 to 61,000)**	**33,100ha (325%)**

Poppy-free provinces include provinces with less than 100 ha in cultivation. National total includes opium poppy found in provinces classified as poppy-free. Numbers are rounded; percentages are calculated based on exact figures.

** While classed as poppy-free in 2024 due to the province holding less than 100 ha in cultivation, Sari Pul had some opium cultivation. The percentage change has been calculated using that value.*

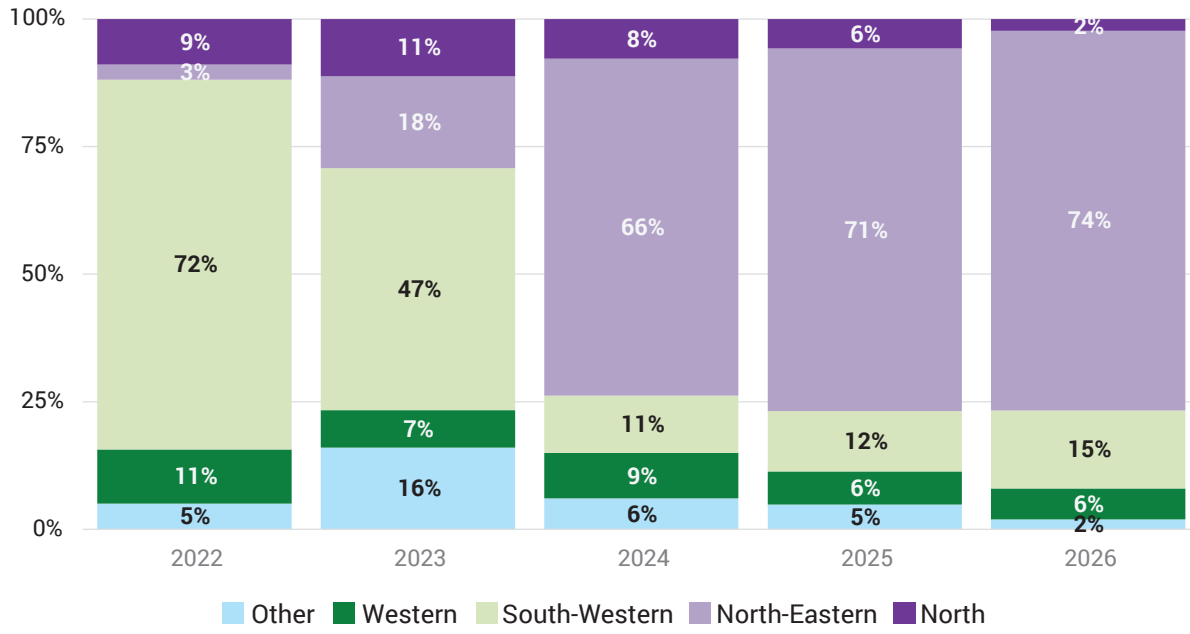
ESTIMATED OPIUM PRODUCTION

Estimated opium production increased from about 300 tons in 2025 to just under 1,500 tons in 2026 (95 per cent CI of 800 to 2,400 tons). The increase in opium production was caused by both increased area under cultivation and increased yields. Nationally, opium-yield estimates increased from 29 to nearly 34 kilograms per hectare. Unlike the previous agricultural season, which was affected by persistent drought and challenging weather conditions, 2026 brought more favourable rainfall during the key period of poppy growth. Improved water availability and suitable temperatures enabled farmers to harvest more opium per hectare on average.

The North-Eastern region also accounted for most of Afghanistan's opium production. The region was estimated to have produced almost 1,100 tons of opium, about three quarters of the national total. The South-Western region saw a sharp increase in opium production from 35 to 225 tons, increasing its share of the total from 12 per cent to 15 per cent.

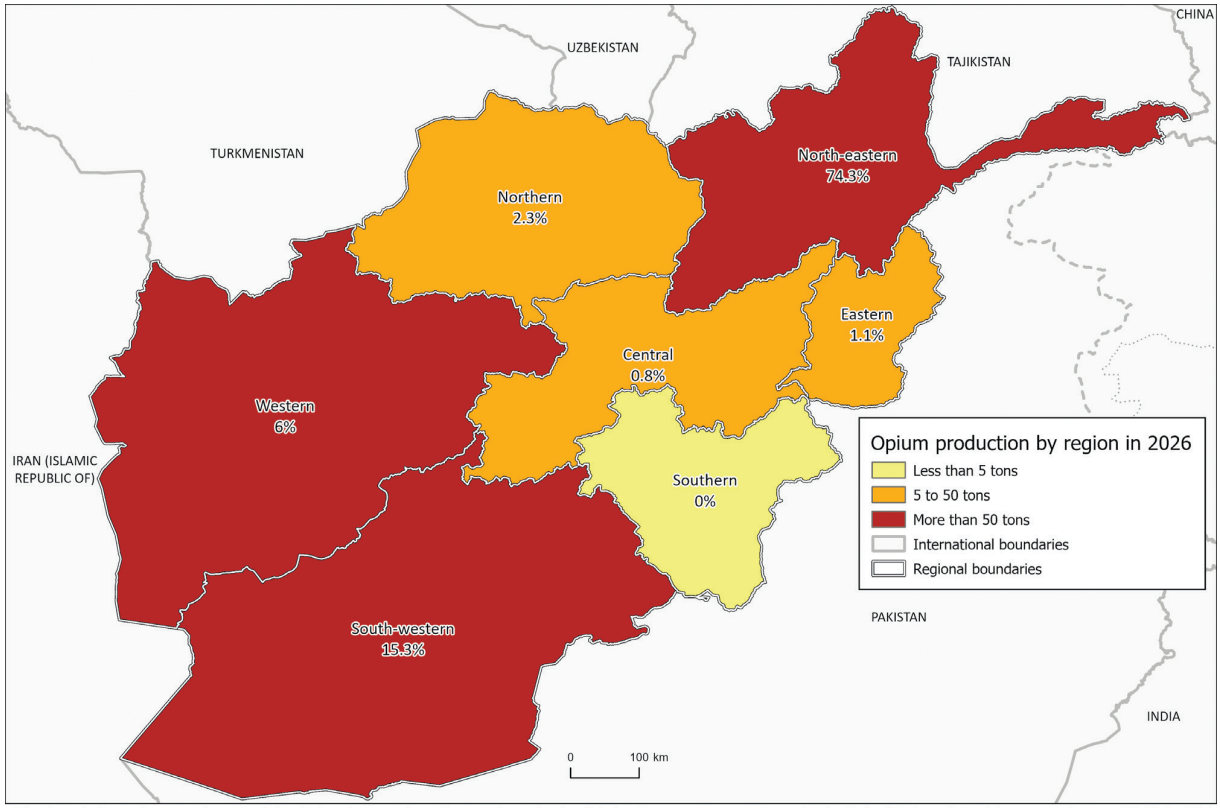
Yield estimates have been calculated using a machine-learning method fed by a variety of Earth-observation datasets and climate indices to generate yield for each region.[4]

FIGURE 7. REGIONAL SHARES OF NATIONAL OPIUM PRODUCTION, BY YEAR



4 Further details can be found in Annex 2

FIGURE 8. ESTIMATED OPIUM PRODUCTION BY REGION IN 2026



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Source: UNODC, 2026

TABLE 2. REGIONAL ESTIMATED TOTALS OF OPIUM POPPY CULTIVATION IN HECTARES AND ESTIMATED OPIUM PRODUCTION IN TONS, 2023–2026

		Region							
	Year	**Central**	**Eastern**	**Northern**	**North-Eastern**	**Southern**	**South-Western**	**Western**	**National (rounded)**
Opium poppy (ha)	**2023**	Poppy-free	1,329	983	1,573	Poppy-free	5,316	1,142	**10,800**
	2024	Poppy-free	528	899	7,563	Poppy-free	1,874	1,679	**12,800**
	2025	Poppy-free	413	641	6,950	Poppy-free	1,324	824	**10,200**
	2026	355	503	1,247	32,935	Poppy-free	5,145	3,127	**43,300 (31,700 to 61,200)**
Opium (tons)	**2023**	Poppy-free	47	37	60	Poppy-free	158	25	**333**
	2024	Poppy-free	23	34	286	Poppy-free	49	39	**433**
	2025	Poppy-free	13	17	210	Poppy-free	35	19	**296**
	2026	12	16	34	1,090	Poppy-free	225	88	**1,466 (805 to 2,439)**
Yield (kg/ha)	**2023**	-	34.8	35.3	35.4	-	29.8	21.3	**32.3**
	2024	-	39.2	34.8	37.7	-	25.8	22.9	**33.9**
	2025	-	30.6	26.7	30.2	-	26.3	23.2	**29**
	2026	34.4	32.2	27.6	33.1	-	43.7	28.2	**33.8**

PRICE DATA RAISES QUESTIONS ON CHANGING EFFICIENCY OF HEROIN MANUFACTURE

Presently, UNODC estimates that the total 2026 opium production could be converted to between 107 and 168 tons of heroin of between 50 and 70 per cent purity.

Prior to the enforcement of the 2022 drugs ban, when opium was cheap and available, UNODC estimated heroin production in Afghanistan by assessing the quantity of opium available for processing after accounting for raw-opium consumption and then applying different factors regarding morphine content and extraction efficiency, heroin-manufacturing efficiency, and heroin purity. Rather than using a single conversion coefficient, the methodology generates a range of possible values reflecting uncertainty regarding opium production, laboratory practices, and purity.[5]

Since the return of the Taliban, UNODC has not been able to verify or validate these conversion factors and instead has relied on historical data on conversion. However, there is increasing reason to question these heroin production totals, which are likely underestimated in today's conditions. Price differentials between a kilogram of opium and a kilogram of heroin have narrowed considerably starting in 2022. The average annual ratio in price between a kilogram of heroin and a kilogram of opium (both of unknown purity) fell from 30:1 in 2019 to 22:1 in 2021 to just over 9:1 in 2026. See Figure 16 for more information on opium, heroin, and other drug prices. This is largely because opium prices have risen more relative to heroin prices. The ratio in price provides a helpful heuristic in assessing changes in efficiency as it offers, roughly, a sense of how much opium is needed for the sale of a kilogram of heroin to be profitable. All else being equal, a decline in this ratio would imply that less opium is now used for manufacturing heroin than in previous years.

However, the price ratio can also be affected by other factors, including inertia in markets, changes in profit margins of traffickers, and availability and use of less costly precursor substances. Considering the contraction of opium production, it would be an economically sensible decision to make heroin manufacture more efficient. Therefore, current estimates of heroin production, which are based on older data, may not reflect improved conversion efficiency and underestimate total possible heroin production.

UNODC is committed to continued monitoring of the situation. Expanded data collection, both in Afghanistan and in destination markets, on key indicators such as prices, purities, precursors and qualitative information, will be needed to determine how far heroin manufacture has evolved and what other shifts market conditions may have affected the price ratio of opium to heroin.

5 See for example https://www.unodc.org/documents/crop-monitoring/Afghanistan/Afghanistan_opium_survey_2017_peace_security_web.pdf for a detailed discussion.

CULTIVATION OCCURS CONCEALED AND SHIELDED FROM DETECTION

UNODC collects and analyses around 1,000 very-high resolution satellite images each year, covering an area of over 30,000km^2. These images allow for detailed insights into cultivation practices. In 2026, possibly in response to perceived or real eradication and enforcement pressures, UNODC identified potential concealment and risk mitigation strategies of farmers. For example, across provinces, hundreds of small poppy plots have been embedded within larger cereal fields, mainly wheat and barley, which makes it difficult to detect them from the ground or by conventional monitoring. Alongside this, as in previous cropping seasons,[6] farmers used traditional walled compounds to shield cultivation from view, particularly in South-Western provinces. In Hilmand province, over 90 per cent of poppy fields sown during the 2026 season used one of these two concealment methods.

At the same time, staggered sowing and harvesting times are being used to avoid uniform, easily recognizable stands and to spread both enforcement and weather risks. These practices are not new in Afghanistan,[7] [8] but now appear across multiple provinces including Hilmand, Kandahar, Herat, Day Kundi, and Takhar. The magnitude and geographical spread of this phenomenon indicate that such practices are not isolated or used only by individual farmers. The scale at which they are being implemented is remarkable, with many of the newly established fields being cultivated in hiding.

Strategy 1. Opium poppy embedding within cereal fields

Concealing illicit poppy crops within or alongside other licit crops was used extensively in the 2026 agricultural season.[9] Concealed opium poppy cultivation was detected in many provinces, including those that had the strongest reduction of cultivation under the DfA, such as Hilmand and Kandahar. The most common cover crops were cereals, which are widely grown and do not raise suspicion when cultivated at scale. Embedding smaller poppy plots within such fields allows farmers to blend illicit cultivation into local agriculture, especially in areas with high – perceived or real – enforcement risks.

As an example, Hilmand shows a marked shift in cultivation patterns between 2025 and 2026. While last season only six per cent of fields were concealed within other crops, in the current season, this increased to over half of fields. Given the increase in the number of fields cultivated in the province, in absolute terms there were fifty times more intercropped fields in 2026 than in 2025.

Strategy 2. Walled fields

The use of walled fields within compounds was noticeable particularly in the South-West. This is a long-standing agricultural practice in Afghanistan

6 United Nations Office on Drugs and Crime. (2024). Afghanistan Drug Insights Volume 2: 2024 Opium Production and Rural Development. https://www.unodc.org/documents/crop-monitoring/Afghanistan/Afghanistan_Drug_Insights_V2.pdf.
7 United Nations Office on Drugs and Crime. (2024). Afghanistan Drug Insights Volume 1: Opium Poppy Cultivation 2024. https://www.unodc.org/documents/crop-monitoring/Afghanistan/Afghanistan_Drug_Insights_V1.pdf.
8 United Nations Office on Drugs and Crime. (2023). Afghanistan opium survey 2023. https://www.unodc.org/documents/crop-monitoring/Afghanistan/Afghanistan_opium_survey_2023.pdf.
9 UNODC analysis of satellite imagery.

whereby plots are enclosed by mud or stone walls to protect them from animals, wind and theft. Since the start of enforcement of the opium poppy ban, illicit cultivation has been increasingly detected within such walled fields. Field observations and remote sensing analysis indicated that many farmers sought to cultivate as much opium poppy as possible within the physical limits of what can be effectively concealed.

This practice was already the predominant form of opium poppy cultivation in some areas. In Hilmand, for example, 81 per cent of fields in 2025 were located behind walls, either in walled fields or gardens. In 2026, the expansion of intercropped poppy reduced the relative proportion of fields cultivated in this manner to 42 per cent. Nevertheless, the absolute number of such fields increased substantially, with the number of fields located in gardens tripling compared with 2025.

FIGURE 9. OPIUM POPPY FIELDS HIDDEN BY OTHER CROPS (YELLOW) AND WALLS (RED)

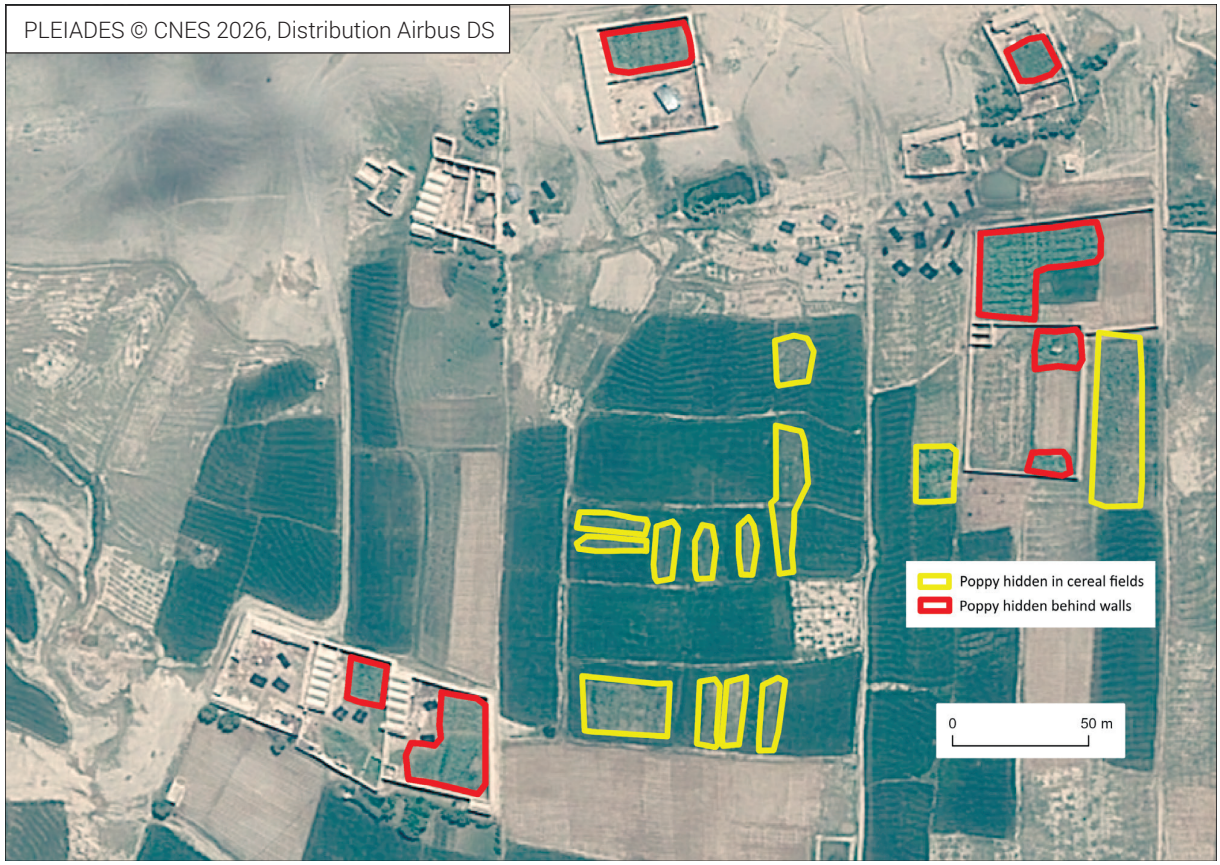
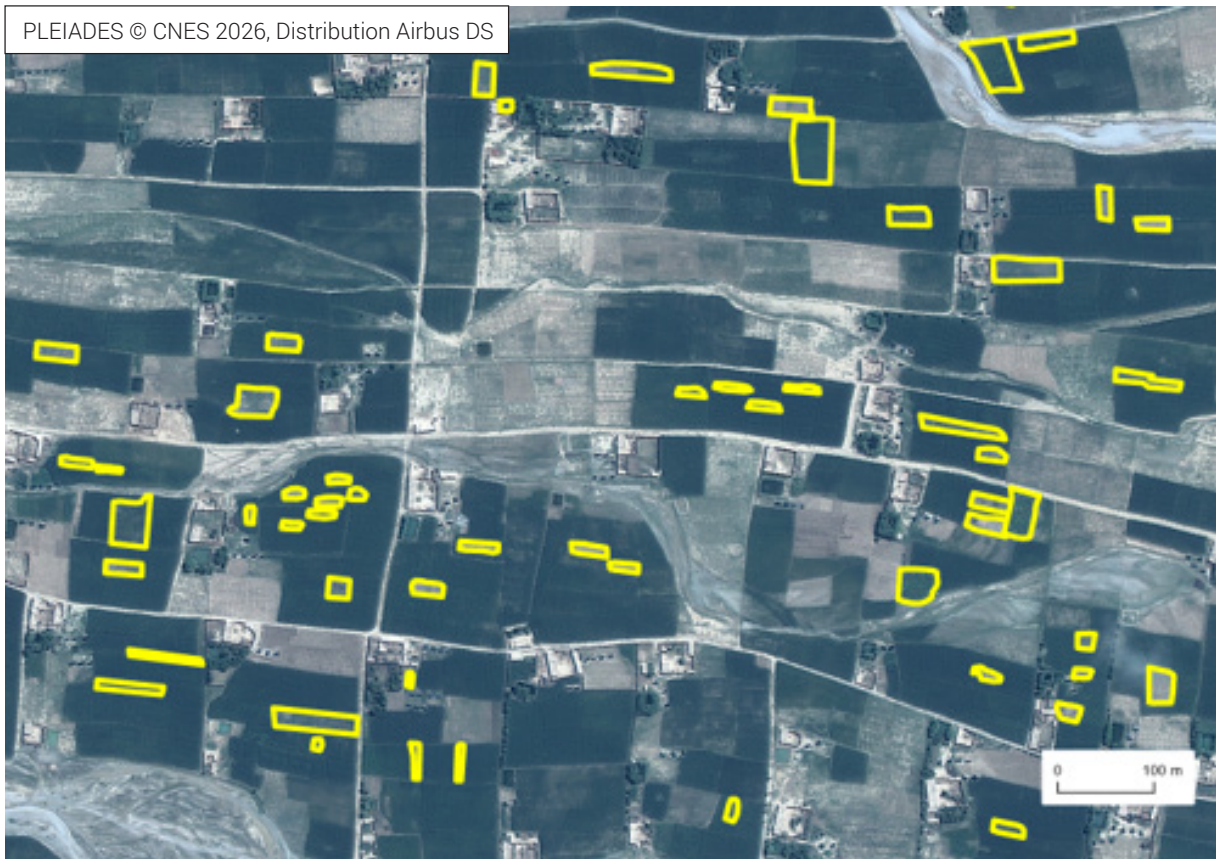


FIGURE 10. IN SOME LOCATIONS, ALMOST ALL OPIUM POPPY CROPS – IN YELLOW – ARE FOUND CONCEALED INSIDE OF CEREAL FIELDS, MAKING THEM MORE DIFFICULT TO IDENTIFY FROM GROUND LEVEL



Strategy 3. Staggered sowing

A third strategy is the deliberate staggering of sowing and harvesting times within a plot and across fields. Instead of planting all opium poppy at the same time, farmers distribute sowing over several weeks, so that different key growth stages, such as the cabbage, flowering and capsule stages, occur at the same time. This reduces the occurrence of large, uniform stands of flowering poppy, which would be easily recognizable by eradication teams.

Staggered sowing also reduces risks of harvest loss. Eradication often focuses on stages where poppy is close to harvest, and staggering increases the chances that at least part of the crop will survive. If earlier-sown poppy is detected and eradicated, later-sown plots may still be at a less conspicuous growth stage and escape intervention; conversely, if eradication teams arrive later in the season, some of the earlier plots may already have been harvested and the opium collected. This practice may therefore also increase the time and costs of eradication efforts, as several repeated visits to the same location may be necessary to eradicate all opium poppy being produced in one area.

In addition, staggering can reduce risks from loss due to adverse weather conditions, such as late frost.[10] If sown later, parts of the fields may survive a frost spell or hail, while other parts are lost.

10 Food and Agriculture Organization of the United Nations. (2011). Managing risk in farming: How to improve the livelihoods of smallholder farmers. FAO. https://www.fao.org/4/i0412e/i0412e.pdf.

FIGURE 11. OPIUM POPPY FIELDS AT DIFFERENT GROWING STAGES RIGHT NEXT TO EACH OTHER. THE OPIUM POPPY IN THE FOREGROUND IS AT THE FLOWERING STAGE, WHILE THE OPIUM POPPY FIELDS IN THE BACKGROUND ARE AT A MUCH EARLIER CABBAGE STAGE.[11] THIS INCREASES THE FARMER'S LIKELIHOOD OF HARVESTING AT LEAST SOME OF THE CROP.



Source: UNODC

11 Poppy plants progress through several distinct stages during the growing season. In chronological order, these are: sowing, emergence, cabbage, stem-elongation, flowering, capsule, lancing, and harvest.

OPIUM-RELATED LAND AND FINANCING ARRANGEMENTS

UNODC collected qualitative information during the 2026 opium season through informal field discussions with farmers, residents and individuals familiar with agricultural and economic conditions in selected rural areas of the North-East. The findings illustrate practices reported in these locations and are not statistically representative of all communities or regions. The findings are consistent with practices that have been previously documented about opium-linked credit and land-access mechanisms,[12] [13] with the most notable difference being the alleged participation of non-local agents.

In the assessed areas, opium cultivation is reportedly supported by informal arrangements involving farmers, landowners, traders and other local or non-local actors. Similar to the situation before the ban, these include land rental or purchase, cash advances, pre-harvest crop sales (locally known as salam or salaam), loans repaid with opium, shop credit and sharecropping.[14] While these arrangements provide farmers with land, capital and inputs where formal finance is limited, informants note that they also increase dependence on the opium economy and the risk of indebtedness.

The continued reliance on informal credit and land-access arrangements reflects the limited availability of viable economic alternatives. Evidence from UNODC surveys indicates that many farming households remain unable to fully replace income previously derived from opium cultivation, increasing the attractiveness of financing arrangements linked to the opium economy and heightening the risk of renewed cultivation.[15]

Non-local actors from former main cultivating provinces in the South-West are reportedly present in Badakhshan, according to information collected by UNODC. Locals from the province claim that non-local actors play a role in renting or buying land and financing cultivation, but this has not been independently confirmed by UNODC. Field information collected in Takhar, however, reported that opium-related credit and partnerships appear to involve mainly local residents. While this information is qualitative in nature and a systematic study would be required to quantify the land and financing aspects of the opiate economy, this anecdotal evidence points towards a similar situation to before the ban, when farmers had a variety of options available to facilitate the financing of opium cultivation.[16]

The reported participation of non-local actors raises questions about the extent to which farming households ultimately benefit from opium cultivation. Where cultivation depends on external financing, land rental arrangements or advance payments, a share of profits may go to actors beyond the farming household and from outside the province. This provides context when assessing the impact of renewed opium production on local rural economies.

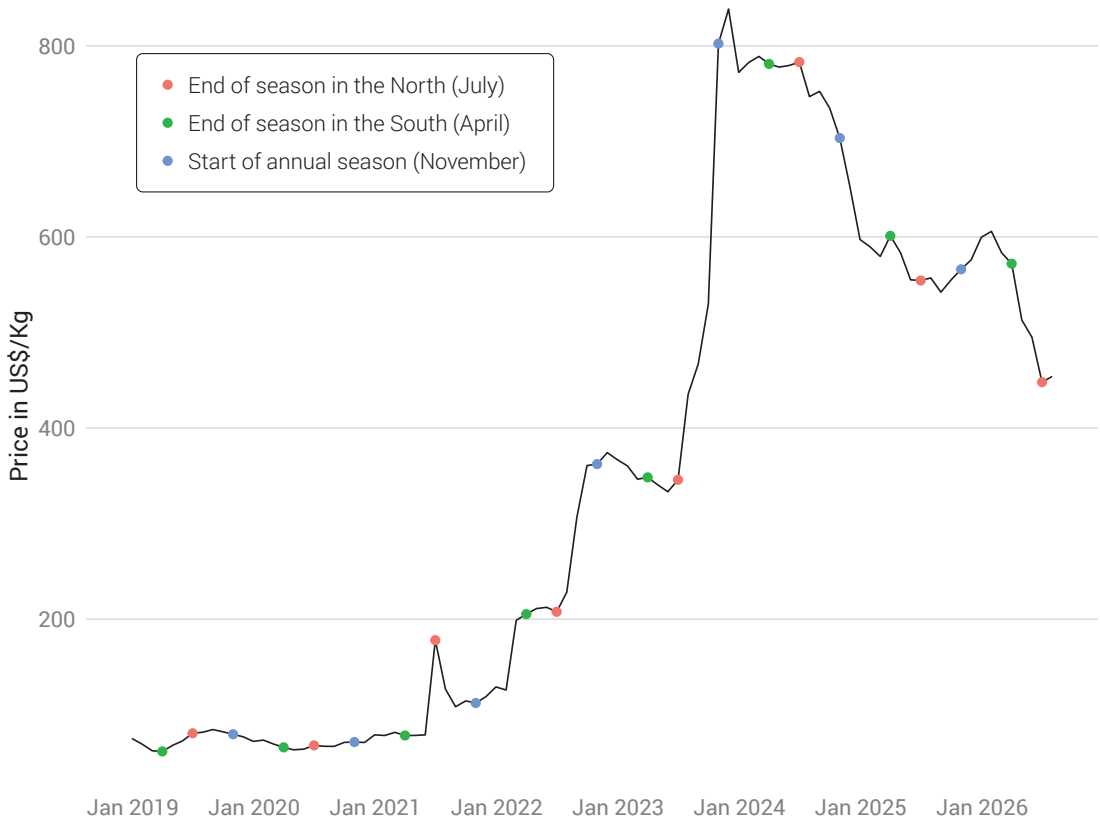
12 United Nations Office on Drugs and Crime. (2017). Afghanistan opium survey 2016: Sustainable development in an opium production environment. https://www.unodc.org/documents/crop-monitoring/Afghanistan/Afghanistan_sustainable_development_for_web.pdf.
13 Byrd, W., & Ward, C. (2004). Drugs and development in Afghanistan (Social Development Papers: Conflict Prevention & Reconstruction, Paper No. 18). World Bank. https://documents1.worldbank.org/curated/en/156391468740439773/pdf/30903.pdf.
14 United Nations Office on Drugs and Crime. (2001). Analysis of the impact of the 2000 Taliban opium ban on the Afghan population. UNODC. https://www.unodc.org/pdf/report_2001-06-26_1/analysis_afghanistan.pdf.
15 United Nations Office on Drugs and Crime (2026), Socio-Economic Impact of the Narcotics Ban in Afghanistan with a Focus in Northern Provinces.
16 United Nations Office on Drugs and Crime. (2003). The opium economy in Afghanistan: An international problem. United Nations. https://digitallibrary.un.org/record/488828/files/afg_opium_economy_www.pdf.

OPIUM ECONOMY AND RELATED DATA

Opium prices

In 2026, opium prices continued their decline from the previous year but remained well above pre-ban levels. Nationally, seasonal (April to July) average dried opium prices peaked in 2024 at USD 780 per kilogram. This declined in 2025 to USD 570 per kilogram and fell again to just over USD 500 per kilogram in 2026. This is a 12 per cent decline from the year before and a decline of 36 per cent from the peak seasonal average in 2024. The current dry prices of opium, while having declined, are still more than three times their pre-ban seasonal averages.

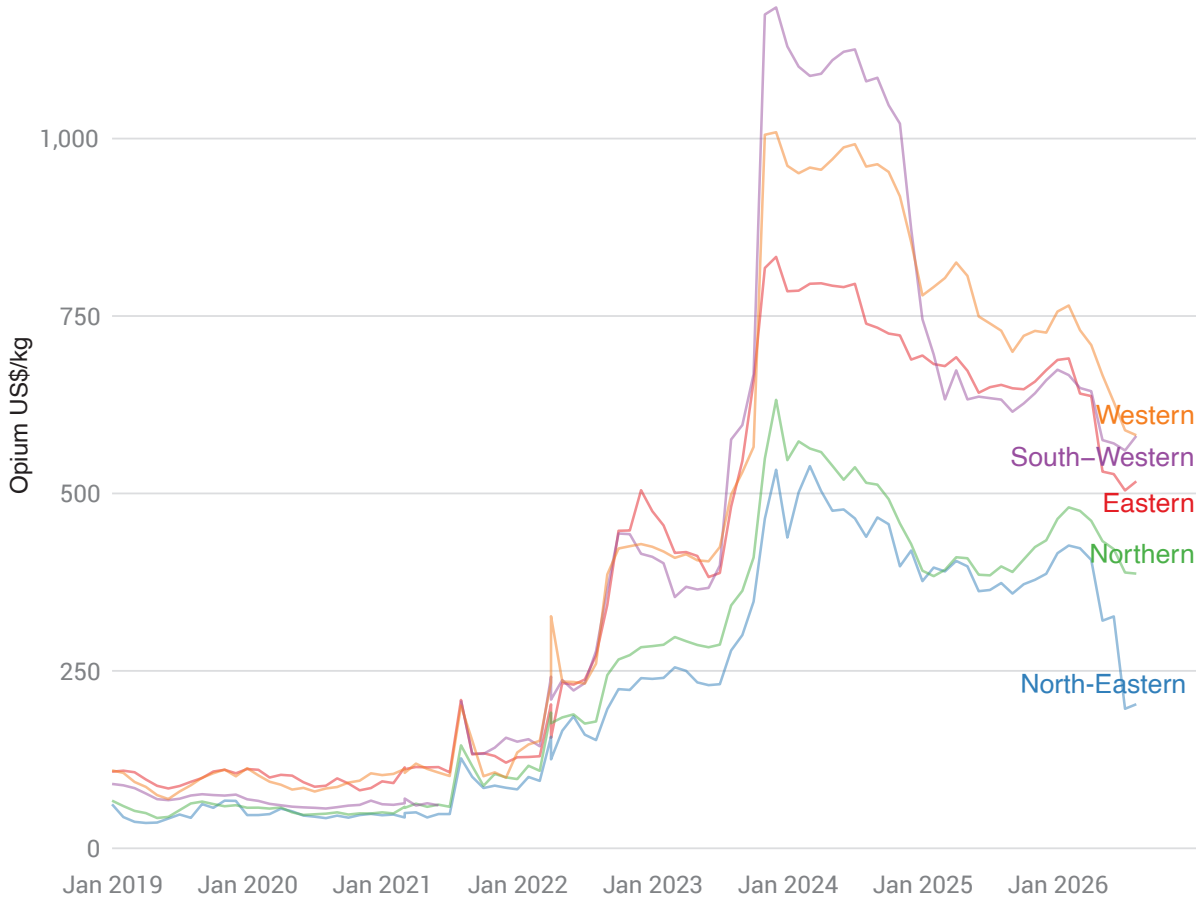
FIGURE 12. MONTHLY NATIONAL AVERAGE OF DRY OPIUM IN AFGHANISTAN, 2019–2026



Source: First-level trader prices collected through UNODC's price monitoring system. First-level traders are traders that buy from farmers and go on to trade opium to other higher-level traders.

The decline in prices was not uniform and regional variations continued to emerge. In the South-Western region seasonal prices fell from around USD 650 per kilogram to USD 590 per kilogram between 2025 and 2026 – about 10 per cent. The North-Eastern region saw the sharpest decline in the 2026 season and prices there seem to have fallen farther and faster than elsewhere. Seasonal prices per dried kilogram of opium were trading at about USD 310, a decline of about 18 per cent from the previous seasonal trader price. As shown in the figure below, the dispersion in trader prices has narrowed since 2024 when variance in trader prices was at its highest. However, regional price differences are still high compared to earlier trends, suggesting that supply has not fully stabilized. Price declines point to increased production across the country, with the drop in the North-Eastern region most strongly correlated with the increasing opium production in that region.

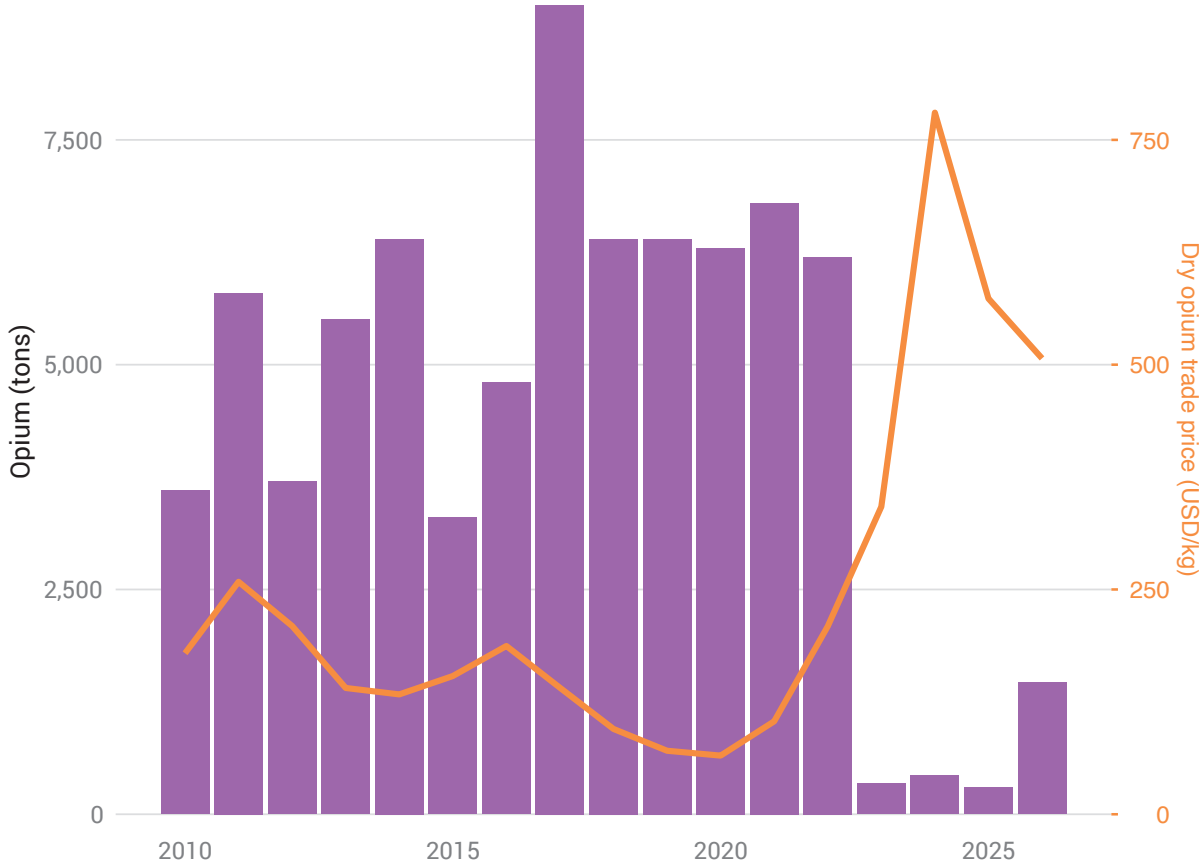
FIGURE 13. MONTHLY TRADER PRICES FOR DRY OPIUM BY REGION, 2019–2026



Source: UNODC Afghanistan price monitoring

These substantial regional differences in trader prices are noteworthy because they can create a strong economic incentive for arbitrage. That is, some individuals or groups may try to buy dried opium from the North-Eastern region and resell it in regions where the price may be double, such as in the South-West. As a result, the internal illegal opium market could play an important role in local economies, with some trafficking networks finding lucrative opportunities.

FIGURE 14. ANNUAL OPIUM PRODUCTION AND SEASONAL DRY OPIUM TRADE PRICES



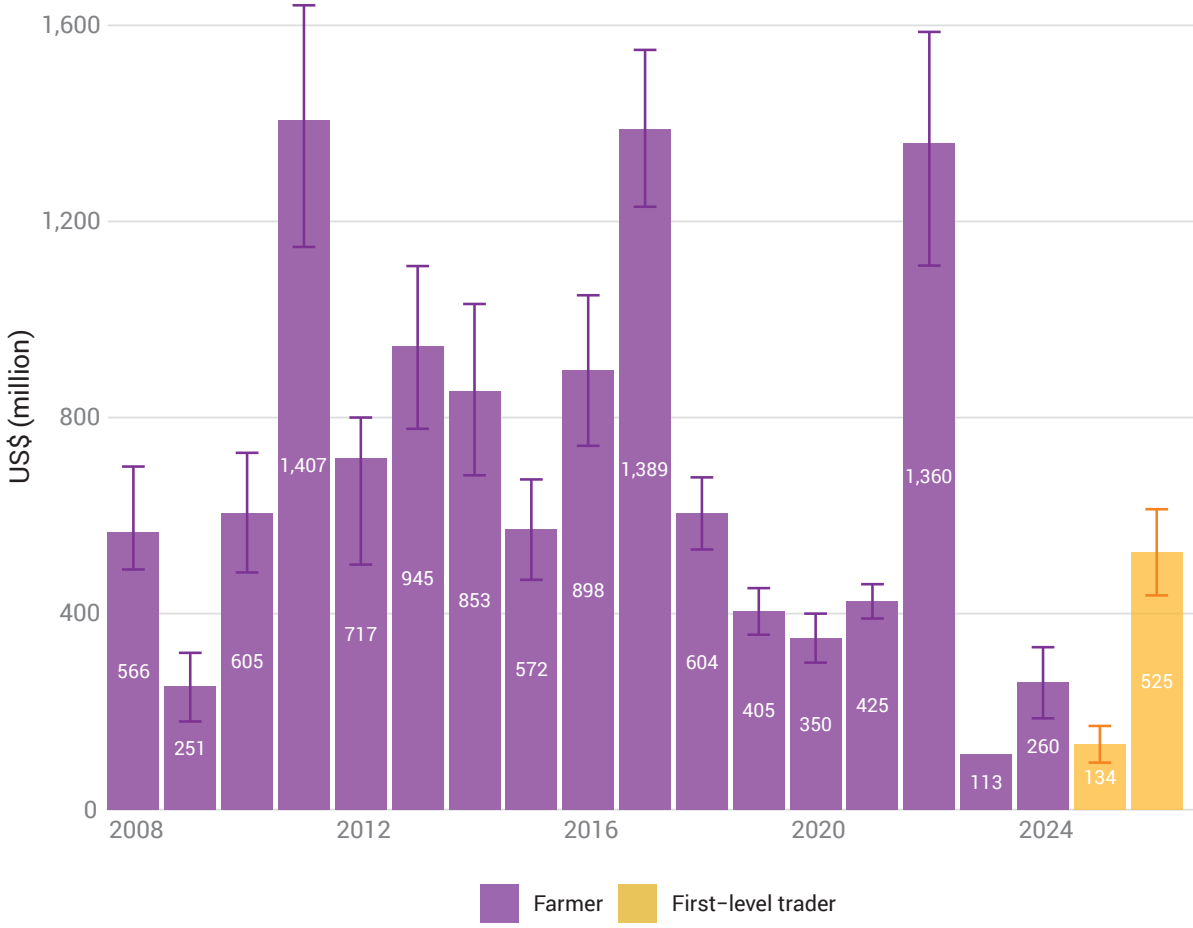
Value of the opium economy

The decline in prices was offset by increased opium production. In 2026, total income of traders from the first-level selling of opium was estimated to be USD 525 million, a stark increase from the previous year when total first-level trader income was estimated to be USD 134 million. Of note, this year's estimate, like last year's, is derived from the first-level trader sales of opium and not farmgate prices. Farmgate prices have not been obtained since 2023 due to the reduced production in recent years but have been closely correlated with first-level trader prices in the years prior to the 2022 drugs ban. The first-level trader price was used to derive a total for 2026 that is of the same order of magnitude as the total farming income estimates in the years before the ban, which usually ranged from USD 350 to 600 million. Apart from 2022, which was an anomaly because opium prices were driven up by the announcement of the ban, the total income to first-level traders in 2026 is the highest since 2018. This reverses three years of very low profits from harvested opium.

The calculations presented here are intended to provide reasonable orders of magnitude of the income generated rather than exact amounts and should therefore be interpreted as indicative of broad market trends rather than precise financial outcomes.

The estimates represent the gross value of opium production at first-level traders and therefore do not capture the additional value generated through subsequent processing, trafficking, exporting or any other activities further along the supply chain.

FIGURE 15. FARMERS' INCOME FROM OPIUM SALES TO TRADERS, 2008–2024 AND FIRST-LEVEL TRADER INCOME IN 2025 AND 2026



Note: First-level trader income totals were estimated for 2025 and 2026. First-level traders are traders that buy from farmers and go on to trade opium to other higher-level traders. Farmer income totals for 2025 and 2026 were not calculated, but are slightly lower than first-level trader income. The prices applied are average prices of the months of the harvest and the one after. Estimates are intended to provide reasonable orders of magnitude of the income generated rather than exact amounts.

Opiate economy as a share of national GDP

In 2025, Afghanistan's estimated GDP was USD 19.66 billion.[17] The total income from the sale of opium comprised approximately 2.7 per cent of national GDP. This compares to pre-ban measures when the farming revenues generated from the sale of opium (farmgate value) comprised anywhere between 1.8 and 3.3 per cent of GDP between 2018 and 2021. For reference, Afghanistan's nominal GDP increased from about USD 18.9 billion in 2019 to USD 20.1 billion in 2020, then fell sharply to USD 14.3 billion in 2021 following the political transition. GDP then gradually recovered to an estimated USD 19.66 billion in 2025.[18]

In comparison to the value of the agriculture, forestry, and fishing sector, the total income from opium sales is estimated to stand at 8.5 per cent of its total value. The sector, excluding illegal activities, accounted for an estimated 34.3 per cent of Afghanistan's GDP in 2024.[19] This suggests that the opium economy has regained significance in the context of Afghanistan's highly constrained and aid-dependent economy. Formal economic activity has contracted and there are limited alternative sources of employment, foreign exchange, and export earnings.

Opium sales make up an important source of income for those rural farming households that cultivate. Therefore, changes in income totals for this segment can have an outsized effect on agricultural labour markets and local economies – directly and indirectly. Opium production is labour intensive, creating on-farm employment and income for those without their own land, including impoverished daily labourers, and funds small-scale traders, transporters and other actors.[20] Those who are not directly partaking in opium-related activities also benefit, since Afghan farmers purchase food and daily needs products, have medical expenses and invest opium money in one-off activities like weddings, creating multiplier effects throughout the local economy and generating income opportunities for a wide range of service providers, traders, and small businesses.[21]

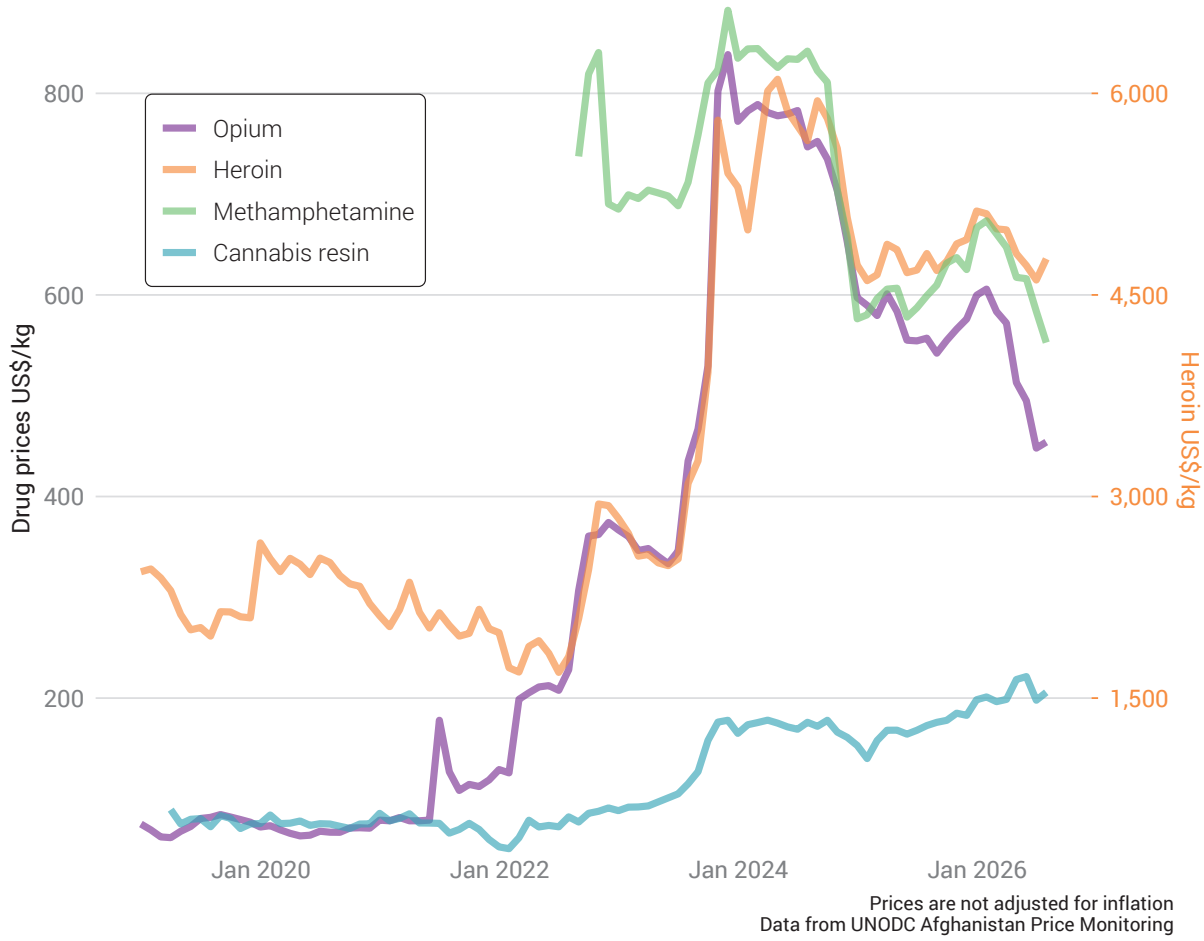
Regionally, the North-Eastern provinces of Afghanistan may have benefited the most from opium production, accounting for almost two-thirds of the value of national income from the sale of opium, with sales of opium estimated to have generated upwards of USD 352 million. However, it is hard to say what portion went to farming households or how much remained in the region as traders and labourers may have migrated to the region for the harvest season and then invested their earnings in other parts of the country.

Other drug prices in Afghanistan

From the price monitoring data, prices for opium, heroin, and methamphetamine have all declined through 2025 into 2026. Heroin prices have continued to parallel those for opium, with opium having declined more sharply during the first half of 2026 to just over USD 500 a kilogram while heroin has remained steadier, trading at just under USD 5,000 since the start of 2025 after peaking at close to USD 6,000 a kilogram. Methamphetamine prices have continued to decline and are now trading at just USD 600 a kilogram. An open question remains as to how strong the links between methamphetamine manufacture and opium production are – methamphetamine and opiates may develop in the same direction when complementary; however, if methamphetamine has become a substitute for opiates, the markets may develop in opposite directions.

17 International Monetary Fund. (2026). Afghanistan: Nominal gross domestic product (NGDPD) [Data mapper]. World Economic Outlook. https://www.imf.org/external/datamapper/NGDPD@WEO/AFG.
18 Ibid.
19 World Bank. (2026). Agriculture, forestry, and fishing, value added (% of GDP) – Afghanistan [Indicator NV.AGR.TOTL.ZS]. World Development Indicators. https://data.worldbank.org/indicator/NV.AGR.TOTL.ZS?locations=AF.
20 See for example: United Nations Office on Drugs and Crime. (2022). Afghanistan opium survey 2021: Cultivation and production. UNODC. https://www.unodc.org/documents/crop-monitoring/Afghanistan/Afghanistan_Opium_Survey_2021.pdf.
21 See for example: United Nations Office on Drugs and Crime. (2021). Afghanistan opium survey 2019: Socio-economic survey report – Drivers, causes and consequences of opium poppy cultivation. UNODC. https://www.unodc.org/documents/crop-monitoring/Afghanistan/20210217_report_with_cover_for_web_small.pdf.

FIGURE 16. MONTHLY PRICES OF ILLEGAL DRUGS IN AFGHANISTAN



Note: The price of heroin per kilogram is indicated on the right-hand side axis; all other drug prices per kilogram are on the left-hand side axis.

ILLICIT DRUG MARKET DEVELOPMENTS IN THE WIDER REGION

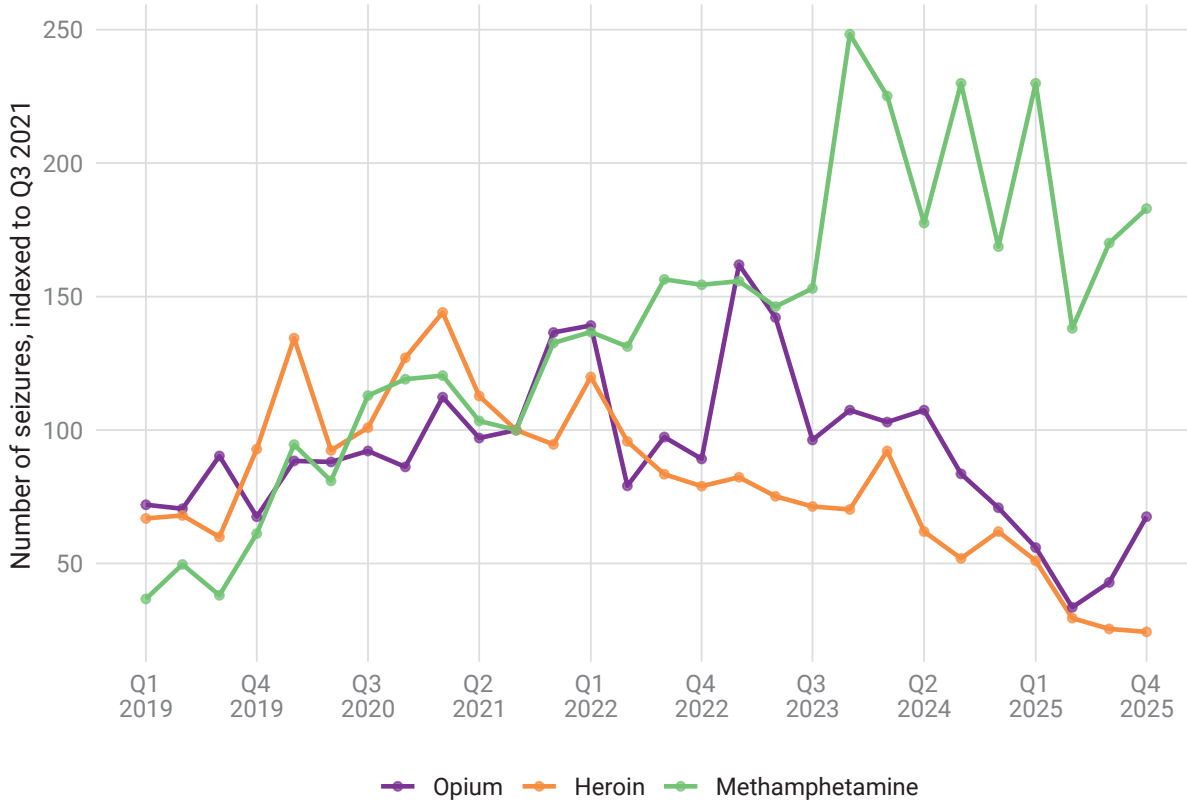
UNODC systematically collects drug seizure events at global level to examine changes in numbers of seizure events (counts) and the average weight of seizure events.[22] Instead of looking at overall seizure totals, the counts and average weights decompose weight totals into two useful measures of frequency and intensity of trafficking. Seizures are frequently driven by chance and by changes in law enforcement activity. Therefore, looking at these two measures allows for an analysis that is more robust towards influences that are not directly related to trends in drug trafficking.

Taken together, the trends in counts and average weights suggest continued but gradually declining opiate trafficking since the ban and through the end of 2024. Measures for methamphetamine, while increasingly volatile, do not point to declines in either their frequency of events or their volumes. The increase in opium seizure events and average heroin seizure weights toward the end of the series would suggest that the supply of opiates did rebound somewhat.

Indexing the number of events to the third quarter of 2021, which is about when the DfA took over, shows that heroin seizures have continued to be less frequent. By the start of 2025, the quarterly counts were half the number they were at the index point of the third quarter of 2021. By the end of 2025 they had fallen by 75 per cent relative to the index period. The number of opium seizure events also showed a marked decline relative to the third quarter of 2021, after initially climbing in the first two quarters of 2023. Starting in the third quarter of 2024, events steadily declined, bottoming out in the second quarter of 2025 at 30 per cent of their baseline count. After that point, seizure counts sharply increased for two quarters through the end of 2025 where they are now down by only a third relative to the index period of the third quarter of 2021. In contrast, methamphetamine seizure counts report no such sustained decline but show substantial quarterly volatility starting in the latter half of 2023. Seizure events since then have remained, overall, stable at around two times more relative to the index quarter. This would suggest a general interruption in the availability of opiates through most of the post-ban period but no clear trend in methamphetamine seizure events.

22 UNODC Drugs Monitoring Platform, DMP Portal.

FIGURE 17. QUARTERLY COUNTS OF SEIZURE EVENTS BY DRUG, INDEXED TO Q3 2021. OBSERVATIONS WITHIN 3,000KM FROM AFGHANISTAN

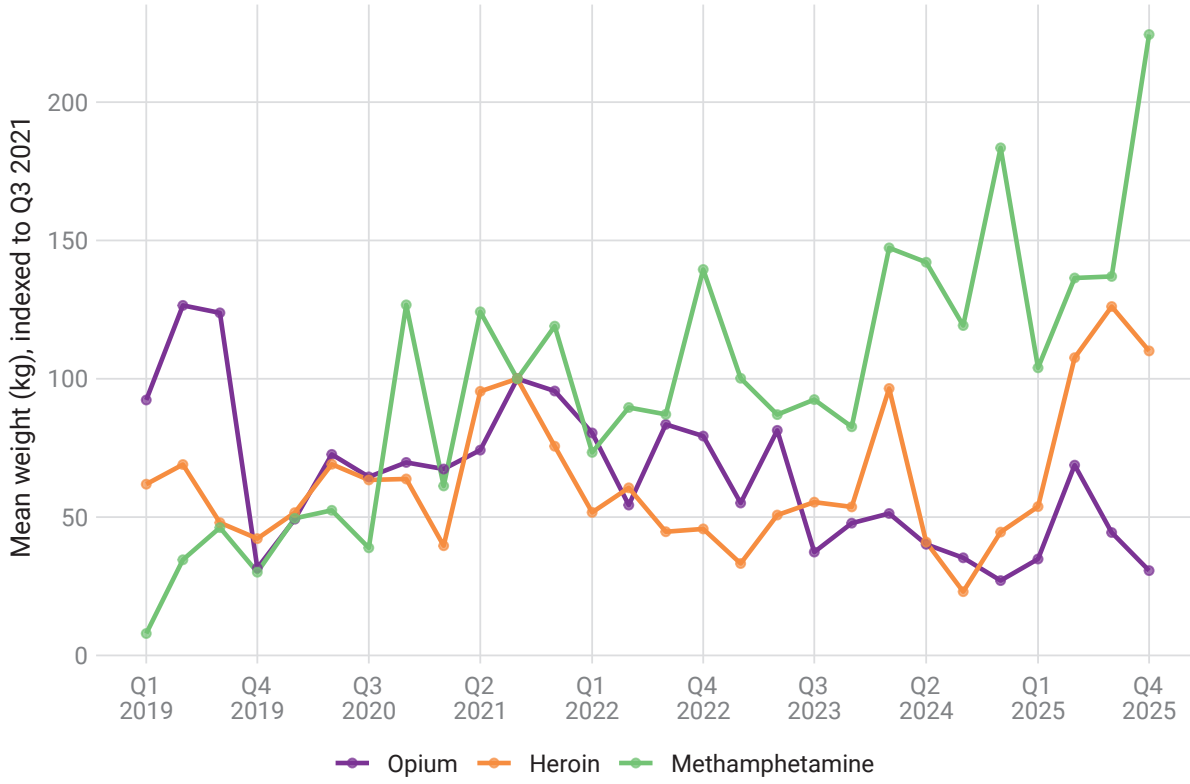


Observations below 0.1kg are omitted
Data from UNODC Drugs Monitoring Platform

In addition to the numbers of events, average weights across the three drug categories also show important recent shifts. For opium seizures, there is a general downward trend in average weights relative to the third quarter of 2021. Overall, average weights declined, bottoming by almost three quarters at the end of 2024. Starting in 2025, average weights increased before declining again at the end of 2025 and are now at about a third of their indexed levels.

Average heroin seizure weights declined through most of the post-ban period but started to rise in the latter half of 2024. They eventually peaked at 125 per cent of their baseline levels in the third quarter of 2025 then fell to just about baseline average weights. In contrast, average methamphetamine seizure weights have continued to increase, and are now more than double their baseline weight averages.

FIGURE 18. AVERAGE WEIGHT OF SEIZURE EVENTS BY DRUG, INDEXED TO Q3 2021. OBSERVATIONS WITHIN 3,000KM FROM AFGHANISTAN



Observations below 0.1kg are omitted
Data from UNODC Drugs Monitoring Platform

Because the data capture geospatially located events within 3,000 kilometres from Afghanistan, it is impossible to validate their country of origin in all instances. Other explanations may exist, including the possibility that opiates or methamphetamine were increasingly produced outside of Afghanistan.

The evidence of opium poppy in cultivation in countries near Afghanistan is limited. Only India and Pakistan report data on eradication to UNODC,[23] and latest available data are from 2024. Data shows a marked increase in eradication in Pakistan between 2021 and 2022 and again between 2023 and 2024. In India, eradication gradually increased between 2020 and 2022, before more than doubling in 2023. In 2024, eradication decreased, but remained at higher levels than before. Eradication is an imperfect proxy indicator for cultivation, but the timely closeness to developments in Afghanistan suggests a reaction of illicit cultivation to the opium poppy ban.

More information and close monitoring through survey work are needed to fully understand the extent to which the 2022 drugs ban in Afghanistan may have affected cultivation in countries other than Afghanistan – and how the renewed dynamics in cultivation will affect it in future years.

23 Annual Report Questionnaires submitted to UNODC.

TABLE 3: HECTARES OF OPIUM POPPY ERADICATED, AS REPORTED TO UNODC THROUGH THE ANNUAL REPORT QUESTIONNAIRE

	2020	2021	2022	2023	2024
India	4,358	4,462	5,583	12,863	9,110
Pakistan	26.7	16.2	286	337	745

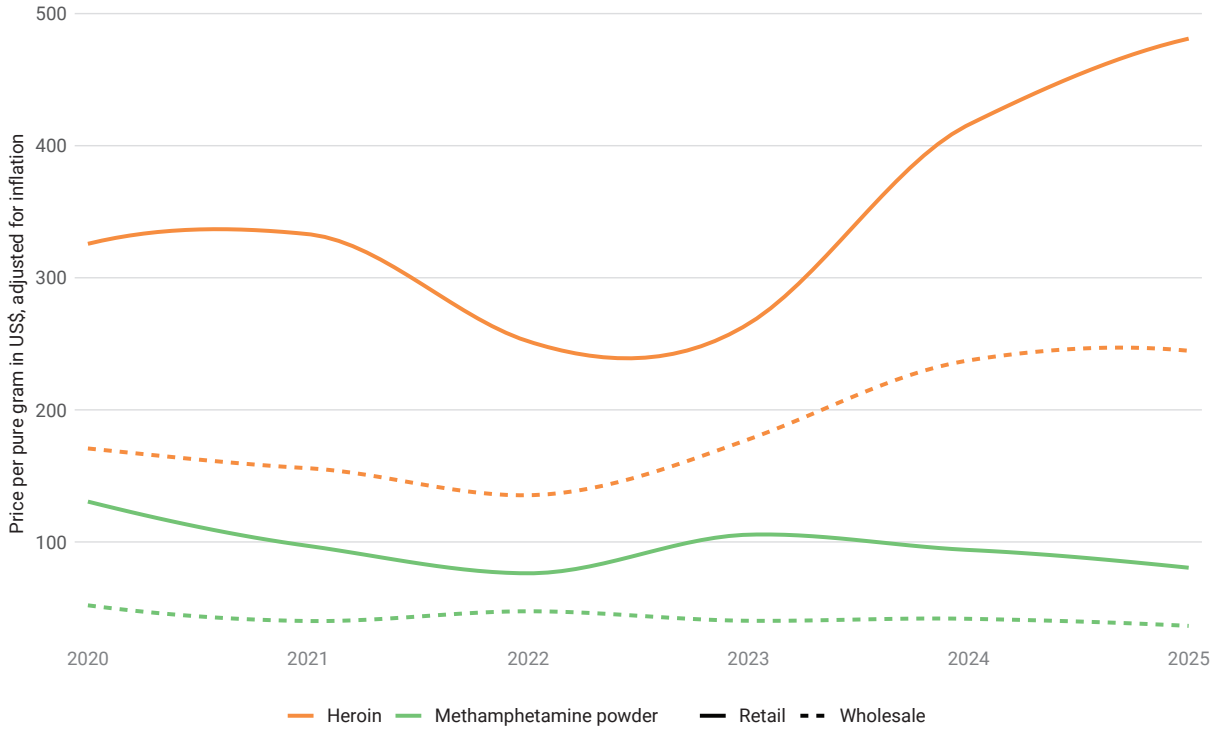
Indicators in destination markets suggest heroin supply constraints

By calculating the purity-adjusted prices of heroin and methamphetamine across retail and wholesale levels in multiple markets it is possible to better appreciate possible changes in supply as a result of several years of minimal opium production in Afghanistan. An examination of data reported to UNODC by Member States continues to indicate declining availability of heroin in countries known to be a transshipment point or destination for Afghan heroin.[24] Purity-adjusted prices of heroin, also adjusted for inflation, have increased dramatically starting in 2024 and continuing into 2025 (the latest year for which data are available). As shown below, the average inflation-adjusted price per pure gram of heroin at retail across 20 transshipment and destination countries (mostly in Europe) has almost doubled from a low of about USD 250 in 2022 to USD 470 in 2025. Across both retail and wholesale levels, the price per pure gram of heroin increased. That said, the purity-adjusted prices for methamphetamine continue to decline in these same drug markets, albeit most European markets are supplied with methamphetamine by sources closer to end markets.

This broadly suggests that major heroin markets, mostly in Europe, have faced supply constraints, which temporally correlate with the start of the Afghan ban that took effect in 2023. Because there is no appreciable change in methamphetamine prices during this period, it is unlikely that the price increases in heroin are a result of greater interdiction efforts or local drug law enforcement in destination markets. That said, opiate stocks in Afghanistan and along trafficking corridors have likely softened such supply shortages as heroin is still available in Europe but at much higher prices than before.

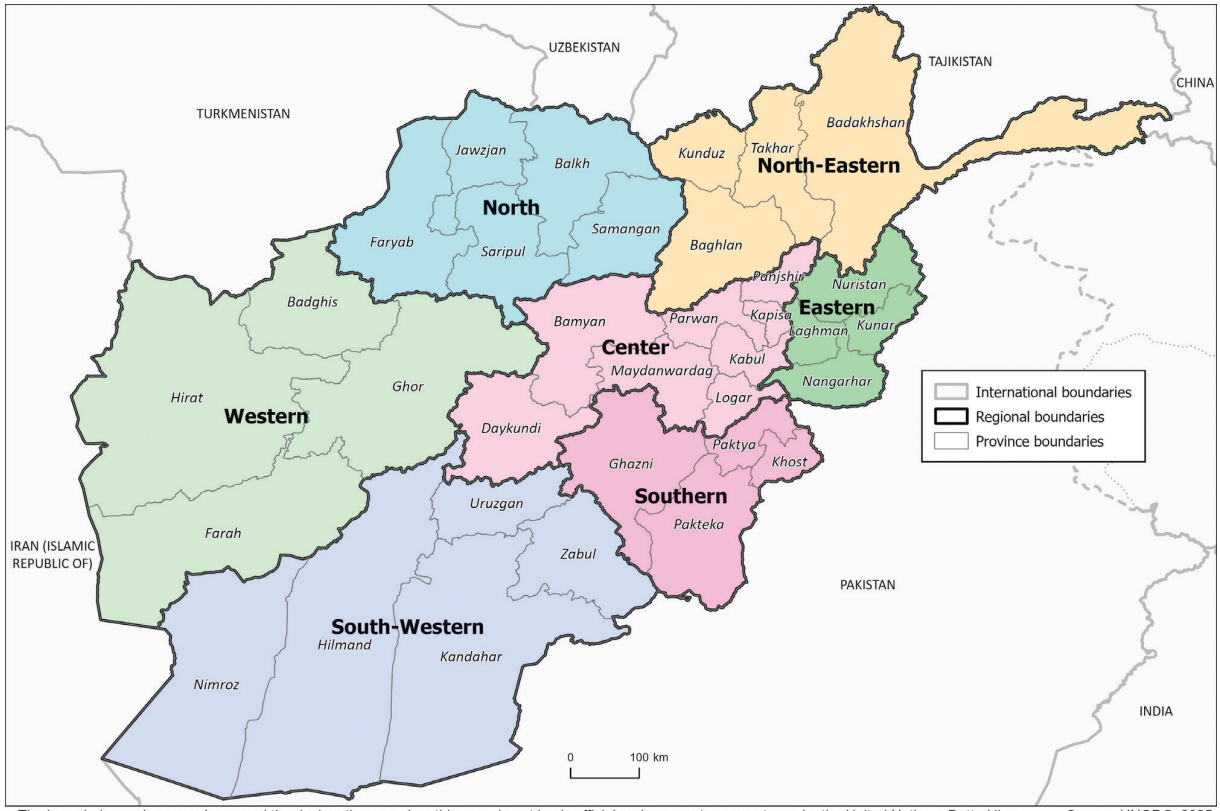
24 UNODC Annual Report Questionnaires.

FIGURE 19. AVERAGE PURITY-ADJUSTED PRICES PER PURE GRAM OF HEROIN AND METHAMPHETAMINE IN USD FOR 20 DESTINATION MARKETS



UNODC: ARQ Data
Averages for 20 destination countries across the series.

ANNEX 1: REGIONAL BREAKDOWN USED IN THE REPORT



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.

Source: UNODC, 2025

ANNEX 2: AFGHANISTAN OPIUM SURVEY REPORT 2026 - METHODOLOGY

1. Estimation of area under opium poppy cultivation

Remote sensing methodologies have been used by UNODC since 2002 to monitor the extent of opium poppy cultivation in Afghanistan. Changes in the location of opium poppy cultivation and the increased security difficulties involved in accessing the area of interest require continuous improvements of the survey designs.

A sampling approach is used to cover those provinces where most of the poppy is found, whereas a targeted approach is used in provinces with a low level of opium poppy cultivation. "Targeted approach" means that a certain area of a province is fully covered by satellite imagery.

From 2015, new and better satellite technology allowed for a major change in the study design: the size of the grid cells used for acquiring satellite imagery has been reduced from 10 x 10 km images to 5 x 5 km images. This change affected only provinces where a sampling approach was used; all other provinces were not affected by this change.

In 2026, out of 34 provinces in Afghanistan, 17 were sampled, 7 were targeted, and one both, sampled and targeted. The remaining 8 provinces were considered to be poppy-free based on information from the field. The main change has been that Logar and Kunduz have been removed from the target province list as they have had virtually no poppy in over a decade and information from the ground indicated this would not change in 2026. One target area from Nuristan was also remover for the same reason. 12 sample cells were also removed -two in Badakhshan, Ghor and Sari-Pul and one each in Helmand, Jawzjan, Laghman and Uruzgan- as no agriculture had been present in them for at least the past four years. Images in Badakhshan have continued being acquired twice with a month of difference in order to ensure that poppy sowed in a staggered manner was identified.

Other than these changes, the same sampling locations have been used since 2019, which ensures high levels of comparability of the annual estimates.

TABLE 1 AREA ESTIMATION METHOD, BY PROVINCE, 2026

Region	Targeted approach	Sampling approach
Central	Kabul, Parwan, Day-Kundi	Day-Kundi
Eastern	Kapisa, Nuristan	Kunar, Nangarhar, Laghman
Northern	Samangan	Faryab, Jawzjan, Balkh, Sari-Pul,
North-eastern	Baghlan	Badakhshan, Takhar
Southern	Ghazni	
Western	Hirat	Badghis, Farah, Ghor
South-western		Helmand, Kandahar, Uruzgan, Zabul, Nimroz

2. Study design

The study design applied in the Afghanistan opium survey was developed in 2015 and since then adapted for selected provinces when appropriate.

2.1 Sampling frame

Thesampling frame was established by extracting the area of land potentially available for opium poppy cultivation in 18 provinces. This area was divided into regular 5 km by 5 km grids, which constituted the sampling frame. The final sampling frame, from which the satellite images were randomly selected, consisted of 8,208 cells. In the case of images that cut across provincial boundaries, only the part falling into a particular province was considered to be in that province.

The area available for agriculture in the sampling frame covers irrigated and rain-fed land.[25] The total area in the 18 provinces was 52,928 km^2, which is equivalent to 41%of all potential agricultural land in Afghanistan. Potential land refers to all land available for cultivation and also includes land that is currently fallow.

Cells containing less than 0.25 km^2 of potential agricultural land were excluded from the sampling frame in order to reduce the likelihood of choosing cells with very little arable land. In total, the exclusions represented less than 1% of the total potential agricultural land.

2.2 Sample size determination

The total number of images to be selected in the sampled provinces was determined in 2015 with the goal to increase accuracy of the estimates and to save cost when compared to previous years.

The accuracy of area estimates depends on the proportion of land covered by satellite imagery and even more so on the number of images than can be acquired. With opium poppy cultivation being concentrated in hot spots and thus unevenly distributed across the agricultural land, information from a large, contiguous piece of land has less value than geographically evenly distributed, smaller pieces information. Costs associated with satellite imagery depends mainly on the total area covered (and not on the number of images). By using 5 x 5 km instead of 10 x 10 km images, at same costs four times the number of images can be acquired. Further details on the sample size determination methodology can be found in Opium Survey, December 2015, page 42.

2.3 Sample size allocation

Theavailable number nof images has been distributed to provinces haccording to a so-called power allocation, which uses agricultural area as size measure. For provincial sample size n_h,

$$n_h = n \frac{X_h^q \, CV_h}{\sum_{h=1}^{H} X_h^q \, CV_h}$$

where $CV_h$is the coefficient of variation of area under poppy cultivation in province *h* and $X_h$land available for agriculture in province *h*. This approach ensures that sample size depends on both the variability of poppy and the size of the province measured by agricultural land. After an empirical assessment, the smoothing parameter *q, 0≤q≤1*, was set to 0.2. In addition, a minimum of 20 samples per provinces was set, which took effect in Day-Kundi and Kunar.

25 The agricultural land for each province is regularly updated in order totake into account any changes.

TABLE 2 SAMPLE SIZE AND AGRICULTURAL LAND AND SAMPLING RATIO, BY PROVINCE, 2026

Province	Total arable land (km²)	Frame	Effective sample size	Arable land in selected cells	% of arable land represented by selected cells
		# cells	# cells	(km²)	
Badakhshan	4,338	396	86	530	12%
Badghis	7,136	636	50	830	12%
Faryab	7,794	532	86	1,461	19%
Jawzjan	3,484	294	38	519	15%
Laghman	262	103	24	60	23%
Ghor	1,694	1144	81	111	7%
Day Kundi	672	406	20	29	4%
Farah	2,820	604	46	480	17%
Helmand	7,802	696	97	1,569	20%
Kandahar	5,176	695	80	909	18%
Kunar	293	124	24	50	17%
Nangarhar	1,330	181	26	361	27%
Nimroz	1,223	213	28	263	22%
Balkh	7,802	256	40	859	11%
Saripul	5,239	379	54	650	12%
Takhar	6,098	456	30	565	9%
Uruzgan	884	277	29	94	11%
Zabul	2,168	541	29	179	8%
Total	**66,215**	**7,933**	**908**	**9,519**	**14%**

2.4 Sample design

In 2015, MCN/UNODC undertook an extensive simulation study which compared various sampling designs and estimation methods in order to determine the best (most accurate with a given number of samples) design for a certain situation.

Case studies were undertaken for Helmand and Kandahar province. The sampling designs considered have been used in the past by MCN/UNODC:

- simple random sampling,
- probability proportional to size sampling (PPS), using agricultural area as a size measure,
- stratified random sampling using compact geo-strata of equal size as strata,
- systematic random sampling.

Two estimation methods have been compared: a ratio estimator using agricultural area as auxiliary variable and the Horvitz-Thompson estimator.

The study concluded that for the two cases considered

- PPS performed best, and
- The ratio estimator is to be preferred for simple random sampling, systematic random sampling, and stratified random sampling. For PPS, it does not yield any improvements in accuracy.

The PPS builds on the correlation between the size measure and the variable of interest. In provinces where poppy and agricultural land are highly correlated, PPS is expected to perform best. In provinces, however, where poppy and agricultural land are only weakly correlated, PPS does not bring any advantages and might reduce accuracy. The drastic reduction in opium poppy cultivation since 2023 may have led in some cases to reduced accuracy of the estimation, as poppy has moved to more remote locations and away from the main agricultural areas.

In Badghis, Balkh, Farah, Faryab, Helmand, Kandahar, Nimroz, Takhar and Zabul, PPS was applied. In the remaining provinces, systematic random sampling was used, a sampling design that ensures an even geographical distribution of samples (see the "Opium poppy 2015 – Cultivation and production" for more details).

In more detail, in a PPS design without replacementa unit has a probability to be selected in the first draw of

$$pi = \frac{x_i}{\sum_{i=1}^{H} x_i}$$

where *x*is the size variable (agricultural land) in unit *i*, and *N*is the number of units that can be selected. The subsequent units have slightly modified inclusion probabilities. For drawing the samples and for calculating the inclusion probabilities the statistical software R(package *sampling*) was used.

Since agricultural area tends to be concentrated in one or more clusters in a province, PPS sampling without further stratification would lead to a concentration of samples in a few spots and possibly do not cover every district. Therefore, in all PPS provinces, the sample was stratified by district.

In the remaining provinces, a one-stage systematic random sampling approach was employed in which a sampling rule was applied that ensured good geographic coverage. Starting from a randomly chosen cell, every kth element from then onwards was chosen, where k is determined by the number of cells in the frame and the desired sample size (the actual sample size might differ slightly).

In *Nangarhar* province, the districts Dara-e-Nur, Kuzkunar, Kama, Behsud, Jalalabad and partially Surkhrod were excluded from the frame.

In 2025, the agricultural area used as the size measure in the sampling frame was updated for 14 provinces, providing a more accurate and up-to-date representation of cultivated land. This improvement strengthens the robustness of the sampling design,

particularly in provinces where probability proportional to size (PPS) sampling is applied, as selection probabilities are directly linked to the distribution of agricultural area. By better capturing recent changes in land use and cultivation patterns, the updated data can enhance the alignment between the size measure and the variable of interest, supporting more reliable and representative estimates. At the same time, the update ensures that the methodology remains responsive to evolving ground conditions while maintaining consistency in the overall sampling approach.

3. Area estimation in sampled provinces

The estimation of the extent of opium poppy cultivation is a ratio estimate[26] for each of the provinces, using potential agricultural land as an auxiliary variable. The national estimate was obtained by adding up the provincial estimates in what is known as a separate ratio estimate.

In provinces where systematic random sampling was applied, the area of opium poppy cultivation, Yk, within province k, is estimated as:

$$Y_k = X \frac{\sum_{i=1}^{n_k} y_i}{\sum_{i=1}^{n_k} x_i}$$

where n_k is the number of satellite image locations within the province; y_i is the area of poppy cultivation in image *i*; x_i is the area of land potentially available for poppy cultivationin image *I*, and *X*is the total potential land available for poppy cultivation in province *k*.

In PPS provinces, where units are selected with unequal inclusion probability, a slightly different ratio estimate was used that incorporates the inclusion probability (Horvitz-Thompson estimator).

3.1 Uncertainty

Since 2023 the drastic reduction in opium poppy cultivation led to a strongly skewed distribution of the observed opium poppy in the samples. Consequently, for provinces where a sample-based approach was applied and production levels were sufficient, bootstrapping was used to estimate variance and derive provincial-level confidence intervals.

26 The ratio estimator did not outperform the Horvitz Thompson estimator in the PPS provinces. The ratio estimator was applied in all provinces for reasons of consistency and to account for possible updates of the agricultural area in future years.

TABLE 3 AREA ESTIMATES OF SAMPLE PROVINCES WITH 95% CONFIDENCE INTERVAL, 2026 (HECTARES)

Province	Point estimate (Hectares)	Lower bound (Hectares)	Upper bound (Hectares)
Badakhshan	29,482	18,091	46,074
Badghis	2,538	879	8,086
Day Kundi	321	157	749
Kunar	205	98	542
Takhar	3,401	1,86	6,405

3.2 Area estimation in target provinces

In provinces where opium poppy cultivation has been highly concentrated in comparable little land, targeted satellite images were obtained to measure the areas involved. The total poppy area of a target province is equal to the poppy area measured on the imagery without any further calculation. For a list of provinces for which the target approach was used see respective table.

In provinces where satellite images were targeted, the estimated area under opium poppy cultivation is not affected by sampling errors, although they may be affected by the omission of areas with very little cultivation. Area estimates of target provinces should therefore be considered as a minimum estimate.

3.3 District level estimation

Following the do no harm principle, district-level estimates of poppy cultivation were not published from 2023 to 2025 due to the decline in cultivation. Instead, a gridded system indicating relative poppy concentration was adopted. In 2026, the increase in poppy cultivation made it possible to resume the publication of district-level estimates. These estimates are calculated by multiplying the proportion of the area of sampled fields identified as poppy fields in each district by the estimated total poppy cultivation area in the corresponding province. This method assumes that the proportion of the area poppy fields observed in the sample is representative of the district's share of provincial cultivation. Districts are then classified according to their estimated cultivated area as Poppy Free (0 ha), Low (greater than 0 to 50 ha), Medium (greater than 50 to 100 ha), High (greater than 100 to 500 ha), or Very High (greater than 500 ha).

3.4 Accuracy assessment

Due to the difficult security situation in many parts of Afghanistan which prevented surveyors from carrying GPS it was not possible to conduct a systematic accuracy assessment. However, spot checks were conducted across the country in order to improve accuracy.

3.5 Estimation of the net cultivation area

In years where eradication took place and was verified, the area figure presented has been the net harvestable opium poppy cultivation area. The effect of poppy eradication activities was taken into account based on data from the eradication verification survey, which provided exact GPS coordinates of all eradicated fields supplemented with additional information. The gross cultivation areas would be the net cultivation plus eradication.

In 2026, no in-house data was available to incorporate eradication efforts into the estimation of cultivated area. However, the DfA provided several datasets on eradication, which were analysed. Although reported technical issues with data collection prevented a full assessment of eradication impacts, it was possible to determine the timing of these efforts. Findings showed that over 85% of reported eradication occurred before UNODC acquired satellite imagery, meaning nearly all eradication was accounted for in the reported poppy cultivation and opium production figures.

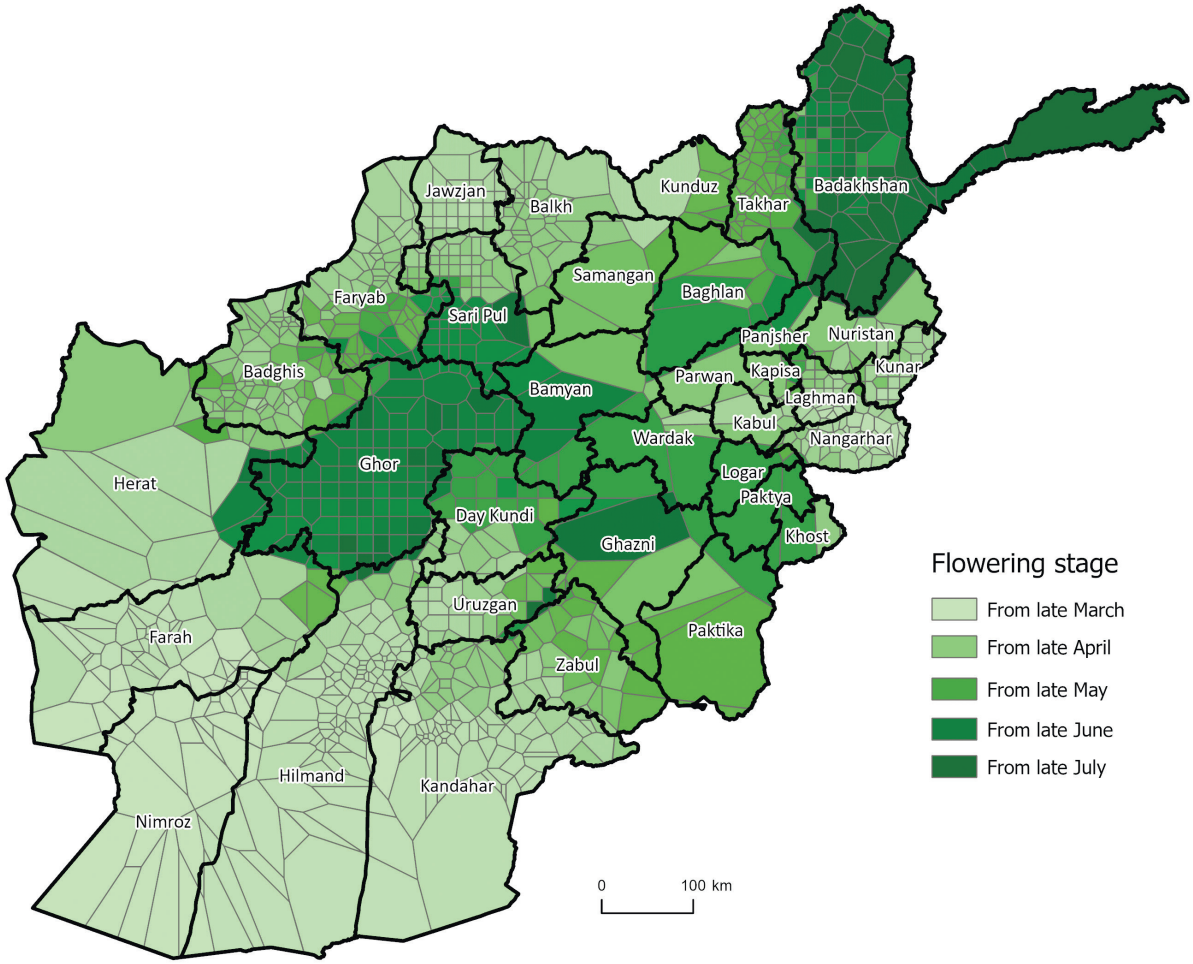
4. Satellite image interpretation

4.1 Acquisition of satellite images

The acquisition of satellite images at the appropriate growth stage of the opium poppy is key to the successful identification of opium poppy fields on satellite images. In recent years, detailed information on the crop growth cycle of each district has been collected in the form of a phenological chart,which is useful for deciding on appropriate dates for satellite data acquisition. Images of the Southern, Eastern and Western regions are collected during March and April due to the early cultivation and maturity of crops in those regions. The crop growth cycle begins later as one goes northward and elevations are increased. Images of the North and North-eastern region are acquired during May, June and July.

The time window for satellite data acquisition is twenty days, depending on the scheduled passing of satellite and weather conditions. The time window for image acquisition aims to capture the full flowering stage. Images acquired in the middle of the prescribed time window facilitate optimum discrimination between opium poppy and other crops. In 2026, the usual acquisition windows were used, as the crop's phenology was normally across the country.

FIGURE 1 NORMAL OPIUM POPPY PHENOLOGY IN AFGHANISTAN



The figure below illustrates the spectral characteristics (expressed in a Normalized Difference Vegetation Index; NDVI) of opium poppy and other crops between February and June. Wheat and opium poppy have the same growth cycle between March and June, as illustrated. The spectral differences between those two crops are more pronounced in February, which marks the beginning of the capsule stage of the crop in this example.

FIGURE 2 SPECTRAL REFLECTANCE OF OPIUM POPPY AND OTHER CROPS

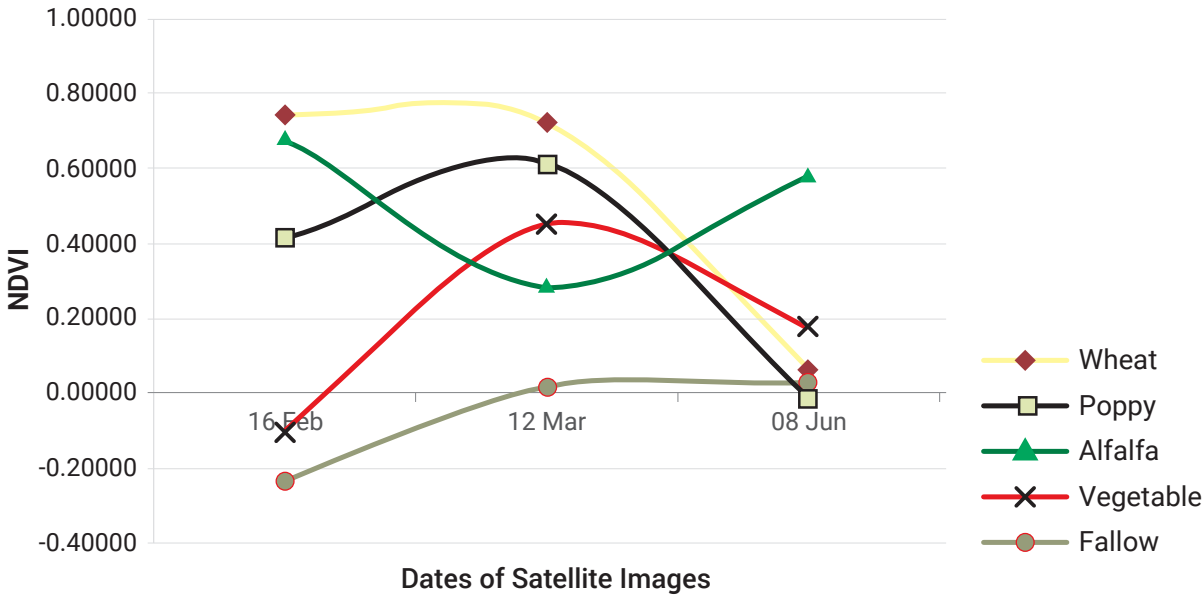
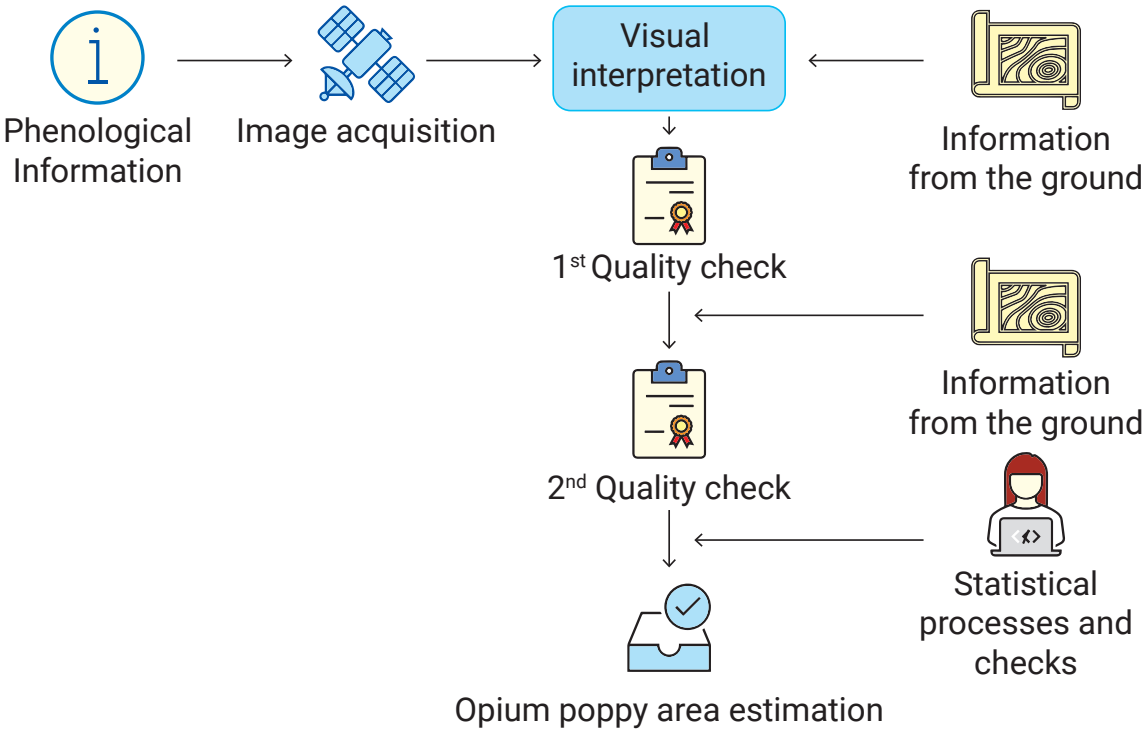


FIGURE 3 IMAGE CLASSIFICATION METHODOLOGY FOR ESTIMATING OPIUM POPPY CULTIVATION AREA



4.2 Interpretation of opium poppy cultivation from satellite images

Images were acquired during the flowering stage of the plant, when their spectral signature is clearest. This helps distinguishing opium poppy fields from other crops, such as wheat, which appears much redder when observed using false colour composite, or against other crops that may not have matured yet and will appear much paler.

Visual interpretation was used to delineate opium poppy fields by interpreting PLEIADES images covering a 5 km by 5 km area. Ortho-rectified PLEIADES images of 0.5 m resolution (PAN-sharpened) were used for this purpose. Opium poppy was identified using these high-resolution images. On top of this, very high resolution Maxar imagery is used when available to perform diachronic checks in areas where the poppy signature is not as clear.

Ground truth information was not possible to be collected systematically this year due to the security and political situation in the country. However, images and reports from different sources were used to confirm or reject those cases where doubts existed about the presence of poppy. Poppy field boundaries were delineated by an on-screen digitization method.

4.3 Band combination for opium poppy identification

Two kinds of band combination were used to detect opium poppy. True-colour combination (blue, green, red) was employed with false-colour combination (infra-red, red, green) in all cases. Analysts used both combinations simultaneously to optimize discrimination between opium poppy and other crops.

4.4 Quality control

A quality control mechanism was applied to the image interpretation process, with each analyst's work being checked by at least two other experts, and in more complex cases three or even reviewers were involved in elucidating if certain fields were poppy or otherwise. All fields determined as likely to be under opium poppy cultivation (potential opium poppy fields) were delineated on the basis ofthe agreement of all interpreters involved. A final overarching quality control stage was introduced to make sure all fields were correctly included as part of the opium estimations.

5. Opium yield and production

In 2026, due to the continuing situation on the ground, it was not possible to systematically collect opium yield data from field measurements. In the absence of the field survey, a method that adapted the the Global Agriculture Monitoring System (GLAM) system to the yield monitoring of opium was designed .

The methodology for forecasting poppy yields in Afghanistan in 2026 uses a range of Earth Observation (EO) datasets, including NDVI, rainfall, temperature, soil moisture, and the Evaporative Stress Index (ESI). These datasets provide insights into vegetation health, climatic stress, and soil moisture, all critical for understanding poppy growth conditions. The data is processed to ensure compatibility with a poppy-specific crop mask and poppy crop calendars. Key climatic-impact drivers are created from this data, capturing agricultural conditions that affect yield. Correlation analysis is then performed to assess how these drivers align with historic yield data. The best-correlated indicators help build a yield forecasting model, specifically a CatBoost machine learning model, which accommodates complex, non-linear relationships between climate data and crop performance.

To refine the model, the CatBoost framework is calibrated through various yield scenarios, including assessments with individual data types to identify region-specific yield drivers. The final model's interpretability is enhanced with SHAP values, which identify the EO variables most impacting yield predictions in different regions. For instance, temperature emerges as a major factor in the southern regions, whereas soil moisture and ESI are more impactful in the northern areas. Confidence intervals for the predictions are generated using conformal prediction, providing reliable uncertainty estimates for the 2026 forecast. This combined approach enables a nuanced and regionally adaptive forecasting tool, designed to capture Afghanistan's varied poppy cultivation dynamics accurately

TABLE 4 YIELDS (KG/HA) APPLIED FOR EACH PROVINCE FOR THE 2026 OPIUM SEASON

Province	Yield
Badakhshan	33.1
Badghis	28.2
Baghlan	33.1
Balkh	27.6
Day Kundi	34.4
Farah	28.2
Faryab	27.6
Ghazni	40.5
Ghor	28.2

Province	Yield
Helmand	43.7
Hirat	28.2
Jawzjan	27.6
Kabul	34.4
Kandahar	43.7
Kapisa	34.4
Kunar	32.2
Laghman	32.2
Nangarhar	32.2

Province	Yield
Nimroz	43.7
Samangan	27.6
Saripul	27.6
Takhar	33.1
Uruzgan	43.7
Zabul	43.7

6. Crop change

Examining how crops change from year to year in Afghanistan involved a focus on four prominent provinces – Kandahar, Helmand, Nangahar, and Farah. These provinces collectively contributed to 74% of the opium production in 2022, making them significant areas for observation. A cloud of approximately 9,700 sample points was randomly allocated within the opium poppy sample areas on agricultural lands. The number of points was calculated so it was representative sample of the agricultural practices of the studied provinces. In order to avoid coding the same field more than once, points were all located at least 50 m away from other points.

At each sample point, the identification of crops for both the current and preceding years was conducted using satellite imagery in line with the broader opium survey methodology. This standardized approach ensured a detailed analysis of the dynamics in crop types.

From 2024, and given its current importance in poppy cultivation in Afghanistan, this exercise was expanded to also cover Badakhshan, with a further 2,587 sample points.

TABLE 5 NUMBER OF SAMPLE POINTS PER PROVINCE

Province	Number of sample points
Badakhshan	2,587
Farah	2,134
Helmand	3,589
Kandahar	2,793
Nangahar	1,832

ANNEX 3:
VIEWS OF THE SURVEY AND ANALYSIS DIRECTORATE OF THE COUNTER NARCOTICS OF THE DEPUTY OF MINISTRY OF INTERIOR ON THE UNODC OPIUM POPPY 2026 REPORT

Islamic Emirate of Afghanistan
Ministry of Interior Affairs
Counter-Narcotics Deputy Ministry

Views of the Counter-Narcotics Deputy Ministry Regarding the UNODC Draft Annual Report

✅ Opium poppy cultivation has increased from 10,000 hectares to more than 43,000 hectares in the year 2026. Badakhshan province ranks first with 29,482 hectares, Helmand province ranks second with 3,525 hectares, Takhar province ranks third with 3,401 hectares, and Badghis province ranks fourth with 2,538 hectares of cultivation.

1. The estimated increase in opium poppy cultivation level from approximately 10,200 hectares in 2025 to 43,300 hectares in 2026 requires investigation, verification, and technical validation of data accuracy. In addition to using online satellite imagery, the Counter-Narcotics Deputy Ministry possesses ground information and GPS-recorded geographic points from all provinces. This information can be utilized to compare the satellite estimate with the actual reality on the ground and to review the accuracy of identifying opium poppy fields. For this very purpose, our estimates, relying on satellite imagery, GPS points, and practical presence on the ground in the provinces, indicate 24,000 hectares, which shows a lower number compared to the UNODC office's figure.
2. Spatial higher accuracy alone does not prove the exact area and depends on other factors as well:
   - On the other hand, during the year, the Counter-Narcotics Deputy Ministry eradicated approximately 23,000 hectares of opium poppy fields by conducting ( )eradication operations at heavy human and financial cost, leaving only a very small area harvested. Out of this harvested portion, a significant amount was also discovered and seized during operations by law enforcement agencies. And the eradicated poppy areahave not been taken into account in the total estimated poppy cultivation within the report.
   - Imaging requires considering the growth stages of poppy plants, which varies by province and at different times.
   - A resolution of 0.5 meters provides the possibility for more detailed identification; however, on its own, it does not prove that all poppy fields have been correctly identified. The accuracy of the estimate also depends on the classification method, the date of the imagery, geographic coverage, and validation with actual ground data.
   - UNODC must provide the actual number of imageries, the exact area covered, the sampling method, and the validation results; because merely mentioning 1,000 imageries covering an area of 30,000 square kilometers with a resolution of 0.5 meters, without explaining the sampling methodology criteria and accuracy of results, is not sufficient to confirm the estimate of 43,300 hectares.

- The method of distinguishing opium poppy from wheat and other crops has not been explained;
- The definition of a poppy field and how its area is calculated has not been explained;
- Having sufficient ground data and access to GPS data across the 34 provinces of the country.
- Comparing satellite imagery results with actual ground data and calculating the error rate.
- Specifying the margin of probable error and the confidence level/interval.

☑ **You have acknowledged that the Afghanistan opium survey in the year 2026 shows that the level of compliance with the ban on poppy cultivation and its implementation in Afghanistan is decreasing.**

The claim of a decrease in compliance with the poppy cultivation ban, without providing measurable indicators, valid comparisons between time periods, and direct evidence of the cultivation status, cannot be accepted as a definitive conclusion.

Qualitative information gathering through informal discussions with local farmers and residents alone is not sufficient to prove a decrease in compliance with the ban at the national level. Such a conclusion requires a systematic comparison of areas under cultivation, the number of areas with cultivation, geographic and temporal changes, and verified information about the actions of responsible authorities, as well as precise statistics.

Therefore, until measurable and verifiable evidence is provided, the conclusion regarding the decrease in compliance with the poppy cultivation ban is not scientifically or technically acceptable.

☑ **It is stated in the report that poppy cultivation has expanded from 11 provinces to 15 provinces of Afghanistan in the year 2026.**

The provinces of Daikundi, Laghman, Nangarhar, Balkh, and Farah have turned from poppy-free provinces into provinces affected by poppy cultivation, and likewise, Zabul province has changed from an affected status to a poppy-free province.

☑ We accept that in some provinces including Daikundi, Laghman, Nangarhar, Balkh, and Farah, poppy cultivation has taken place during the year 2026; however, based on documented information and evidences available in our office, the identified poppy fields in these provinces have been eradicated. Therefore, merely identifying cultivation at a single point in time, without considering the imaging date and eradication operation outcomes, is not sufficient for final classification of these provinces as provinces with poppy cultivation.

☑ **Opium production has reached nearly 1,500 metric tons in the year 2026 from 300 metric tons.**

In the years prior to 2022, the per-hectare yield was estimated through direct sampling from fields, measuring poppy capsules, and carrying out complex technical stages. If, in your current survey, the stated method has been replaced with climate models and information related to rainfall, drought, and crop health, it is necessary to test the accuracy and validity of this model against actual field data. The fundamental question is, on the basis of which actual samples or which analyzed model has the per-hectare yield of 34 kilograms been calculated and its informational accuracy verified? Without clarity in this regard, the figure of nearly 1,500 metric tons should be presented in the estimated figures while factoring in the potential margin of error.

☑ **The price of opium has been around $500 per kilogram and remains high.**

You have reported the price of opium to be around 500 dollars per kilogram and have still described it as high; whereas, if a regular field survey has not been conducted in the provinces to collect and verify these prices, it is necessary to clarify the source of information, collection date, number and volume of samples, and the method used to calculate the average prices. The price of opium in different regions varies based on quality, supply and demand, and market levels; therefore, generalizing a single figure nationwide without fresh and verifiable data from local markets requires clarification and further explanation.

✅**The income of traders from opium in the year 2026 is estimated at around 525 million dollars.**

✅ According to t1he reported figures of the esteemed UNODC office, the opium cultivation area is 43,300 hectares, the yield per hectare is 34 kilograms, and the total production is estimated at nearly 1,500 metric tons. Additionally, the income of farmers is reported to be 525 million dollars. Calculating the cultivation area multiplied by the yield per hectare shows a production equivalent to 1,472.2 metric tons, which matches the approximate figure of 1,500 metric tons. However, if the price of each kilogram of opium is considered to be 500 dollars, the total value of 1,500 metric tons reaches 750 million dollars; whereas the reported income of farmers is stated to be 525 million dollars. Therefore, it is necessary for UNODC to clarify the method of calculating income, the actual price at the farmgate level, the source of price information, and the potential discrepancy between the total value of production and the net or gross income of the farmers.

✅ The total production is estimated to be nearly 1,500 metric tons. Meanwhile, during the year, the Deputy Ministry of Counter Narcotics carried out ( )operations and eradicated an area of approximately 23,000 hectares of poppy fields at a heavy human and financial cost, and a large quantity of the harvested product was also seized and confiscated during these operations by law enforcement agencies. Subtracting the eradication figures of the poppy fields from the total estimated cultivation of poppy has not been taken into account in the report, and an imaginary estimate has been presented. This report indicates that the exact amount cultivated was harvested without any hindrance.

✅ **The opium economy constitutes about 2.7% of the country's GDP and 8.5% of the agricultural sector.**

✅ UNODC has reported the share of the opium economy to be about 2.7% of the Gross Domestic Product (GDP) of the country and 8.5% of the agricultural sector; however, if the sources of the presented figures, the year, the calculation method, and the figures used for GDP and the value added of the agricultural sector are not specified, independent verification of the accuracy of these percentages is difficult. To validate this estimate, UNODC needs to clarify the source of the GDP figures, the value added of the agricultural sector, the method of calculating the opium economy, and the way farmers' income is separated from the total value of production. Additionally, it must be clarified whether these percentages are calculated based on the gross value of opium production or its economic value added; because these two indicators are not identical from the perspective of economic activities.

Meanwhile, out of the total area under cultivation, a large percentage of it has been eradicated (meaning its yield was not harvested), and on the other hand, a large amount of the cultivated product was seized and confiscated by law enforcement forces. So, how have you concluded that 1,500 metric tons of poppy product was available and entered the trafficking market?

✅ **Continuous monitoring of cultivation, production, price, and trafficking remains necessary.**

✅ Monitoring of cultivation, production, price, and trafficking of narcotics is always carried out by various counter-narcotics sectors of the Islamic Emirate of Afghanistan, and annually thousands of counternarcotics operations (trafficking, production, eradication, arrest, destruction of narcotics production factories, etc.) are launched in different parts of the country and borders, and the relevant reports are prepared and shared with relevant domestic and foreign agencies."

✅ **The ban on poppy cultivation is not a sustainable solution to reduce poppy cultivation.**

✅ We also accept that the ban on poppy cultivation by itself is not a sustainable and long-term solution and must be accompanied by alternative livelihood programs, economic support for farmers, and the creation of job opportunities. However, the implementation of such programs requires cooperation and support from the international community as well; combating narcotics is a shared international responsibility, and without comprehensive cooperation in the development,

economic, and alternative livelihood sectors, achieving a sustainable solution will be difficult. But, in the absence of international community support, we cannot stop the law enforcement process.

It should be noted that the Islamic Emirate of Afghanistan, in cooperation with the people, eradicates any cultivation that is hidden from sight, and in this regard, we have live examples with us that we can share with you along with its implementation mechanism if necessary.

- ✅ **Farmers hide poppy cultivation in grain fields and walled lands to reduce the risk of their poppy fields being eradicated.**
- ✅ If farmers hide their opium poppy cultivation among grain crops or walled lands to prevent the eradication of poppy fields, this issue could indicate their anxiety regarding identification and the eradication of poppy fields. Such a situation is directly related to the seriousness of responsible departments in implementing the ban decree on cultivation and executing eradication operations. However, for an accurate conclusion, it is necessary that this claim be verified with documented field and verifiable evidence and information.

Therefore, our claim in this section also holds true that distinguishing poppy among herbs and mixed grain fields is difficult, and the probability of error is higher when relying solely on satellite imagery.

- ✅ **Multi-stage cultivation and harvesting have also been used as a method to reduce the risk and eradication of poppy fields; meaning a single plot of land has been cultivated with poppy multiple times.**
- ✅ Mentioning multi-stage cultivation and harvesting on a single plot of land require time-and-space analysis and are verifiable. If the **UNODC** office has only imaged the targeted areas once, how did it determine that a single plot of land was under multi-stage cultivation during a single crop season?

Proving this claim directly requires multi-temporal satellite imagery, or alternatively, monitoring growth stages and valid ground-truth data. Therefore, the **UNODC** office must clarify its information source and technical methodology to verify this claim. It must clarify whether this phenomenon was observed directly or is merely based on assumption, intuition, and statistical inference.

- ✅ **In Helmand, about 90% of poppy fields were hidden in some manner (more than 50% in grain fields and more than 40% in walled compounds).**
- ✅ Your assessment indicates that around **90%** of poppy fields in Helmand were hidden, with more than **50%** inside grain fields and over **40%** within walled compounds. These figures require explanation and verification. Given that the imagery used has 0.5-meter pixels, separating poppy from grains in mixed fields and determining accurate boundaries without ground-truth validation methods and ground data faces technical limitations. Furthermore, it must be clarified based on what standard criteria walled compounds were identified, and how it was confirmed that poppy was cultivated inside them. Therefore, **UNODC** must clarify whether these percentages are based on direct observation, image analysis, and field sampling, or if they are purely a modeled calculation.

- ✅ **Drug trafficking has not completely stopped after the ban and is likely supplied from previous stockpiles.**
- ✅ In the report from the esteemed UNODC office, it is stated that drug trafficking has not stopped after the ban and is partly supplied from previous stockpiles. which requires valid evidence and statistical data. While all areas and lands of the country are under the security and intelligence coverage of law enforcement agencies, no probable stock from previous years can remain hidden from the sight of counter-narcotics intelligence agencies. It is necessary to clarify based on what figures and market data or analysis of previous stocks this conclusion has been made. Furthermore, it must be clarified how the share of previous stocks from current trafficking has been segregated and estimated. Without presenting sources, analytical methodology, and verifiable evidence, this claim remains a mere probability and cannot be accepted as a definitive conclusion.

☑ **Opium Previous stockpiles are likely declining; UNODC had estimated that these stockpiles could last until 2025 or 2026.**

You have stated that opium pervious stockpiles are likely declining and may last until the years **2025** or **2026**. Necessary components of this estimate include the baseline source, initial volume of the stockpiles, annual consumption rates, and the methods used to calculate reduction. It is necessary to specify the source of this estimate, the initial volume of the stocks, the annual consumption and trafficking rates, and the methodology used to calculate the depletion of the stocks. Without presenting documented data and a calculation methodology, determining how long the previous stocks will last cannot be independently verified.

☑ **Increased opium prices after the ban have created significant profit margins for traffickers.**

Regarding the analysis of opium prices after the ban and the creation of significant profit margins for traffickers, the source must be cited. Official and credible price figures from both before and after the ban, along with the date, transaction locations, and calculation methods of the profit margins, must be provided to support this claim. Without providing this evidence, the rate of price increase, and its impact on traffickers profits cannot be independently verified. While the land area utilized by traffickers decreases from 260,000 hectares of land to 10,000 hectares, how can the traffickers be considered in profit.

☑ **Declining stockpiles may serve as an incentive for traffickers to encourage farmers to resume poppy cultivation.**

Increasing the traffickers' incentive to encourage farmers to resume poppy cultivation is merely a probabilistic and qualitative interpretation, not a statistical figure or a definitive conclusion. Therefore, the source of this analysis and its supporting evidence must be clearly specified. Presenting this as a proven conclusion must be avoided. Furthermore, if possible, the level of uncertainty or limitations of these evaluations should be explained.

☑ **Economic problems and the lack of alternative income sources can drive some farmers back to poppy cultivation.**

☑ From our point of view this analysis can inherently encourage farmers to resume poppy cultivation. It is clear that the economic difficulties of the farmers must be resolved; the Islamic Emirate of Afghanistan has fulfilled its responsibility to the best of its ability in this regard, and the international community must step forward to resolve this issue.

☑ **The likelihood of a resurgence in poppy cultivation and heroin trafficking after 2026 exists; this trend depends on price, global demand, new markets, and the production of opium-based substances in other countries.**

Assessing the likelihood of a resurgence in poppy cultivation and heroin trafficking after the year **2026** must be based on a comprehensive analysis and the presentation of exact numbers regarding the cultivation level, production volume, prices, global demand, trafficking trends, and the status of opium production in other countries. Otherwise, this assessment carries an inherently speculative and unpredictable nature and cannot be accepted as a documented and credible conclusion. This is because the expansion or contraction of poppy cultivation areas depends on multiple interconnected variables, making any absolute prediction highly difficult and speculative.

☑ **Methamphetamine trafficking continues, and unlike other narcotics, no clear reduction has been observed in its seizures.**

☑ The claim regarding the continuation of methamphetamine trafficking and the lack of a clear reduction in its seizure amounts must be documented by presenting detailed figures and comparing seizures across different years, categorized by substance type, trafficking routes, and relevant regions. Additionally, the source of information and analysis methodology must be specified, because seizure volumes alone do not necessarily reflect the actual scale of trafficking; an increase or decrease can be influenced by detection activities, operational capacity, and shifts in trafficking routes.

- ✅ **It is not yet clear whether the seized methamphetamine was produced inside Afghanistan or smuggled in from other countries.**
- ✅ If the origin of the methamphetamine seized inside Afghanistan is still unknown, this matter must be investigated using technical data and evidence. It is necessary that laboratory research results, the evaluation of precursor chemicals, evidence related to discovered production laboratories, and trafficking routes be analyzed if available. Otherwise, without sufficient evidence, domestic production or the influx of these substances from other countries cannot be confirmed, and this matter should be stated as an information gap, not a definitive conclusion.

- ✅ **In most provinces where cultivation occurs, the cultivation area has increased.**
- ✅ Statements regarding the increase in poppy cultivation areas in most provinces must be documented with precise, comparative data for each province in the years 2025 and 2026, along with information sources and estimation methodologies. Also, the criteria for accepting poppy cultivation must be based on GPS data, official cadastral statistics of poppy fields, and the physical presence of surveyors on the ground.

- ✅ **This increase could represent a return to an upward trend in cultivation after three years of decline.**
- ✅ An increase in the estimated cultivation area in a single year is not sufficient on its own to prove the return of a sustained upward trend following three years of decline. For such a conclusion, valid figures and multi-year comparisons, a uniform estimation methodology across different years, and the effective factors influencing cultivation changes must be presented. Furthermore, it is necessary to clarify to what extent the reported increase corresponds with ground survey information and official statistics on fields eradication; otherwise, this statement should merely be raised as a probability, not a registered document.

- ✅ **The northeast in the year 2026 was the main center of poppy cultivation in Afghanistan, accounting for about 76% of the country's cultivation.**
- ✅ Your findings stating that 76 percent of opium poppy cultivation in Afghanistan in 2026 was concentrated in the northeastern region is not an accurate assessment; the Directorate of Narcotics Survey and Analysis has its own estimate in this regard, and such figures are incorrect. If needed, we can share the precise cultivation figures across Afghanistan with you.

- ✅ **Opium poppy cultivation in the northeast increased from less than 7,000 hectares to nearly 33,000 hectares in the year 2026, with most of the increase related to Badakhshan.**
- ✅ Your Statements regarding estimated cultivation in the northeast must be documented by presenting province-by-province comparative data specifically for Badakhshan and by verifying it with reliable satellite imagery, GPS data, and official eradication statistics from the Deputy Ministry of Counter Narcotics. Otherwise, the accuracy of this increase cannot be confirmed.

- ✅ **Opium poppy cultivation in the southwest also increased from 1,300 to more than 5,000 hectares.**
- ✅ This claim also needs to be documented with precise data separated by southwestern provinces, and verified against satellite imagery, GPS data, and official field eradication statistics to make the reported increase verifiable.

- ✅ **Eradication operations in some parts of Badakhshan during the months of May and June 2026 were accompanied by local protests, resulting in a number of deaths and injuries.**
- ✅ The eradication of poppy fields—ordered by the leadership of the Islamic Emirate of Afghanistan—is a mandatory directive. While counter-narcotics enforcement naturally faces protests as a normal part of implementing the law, this action has never caused the poppy eradication process to halt, and the process continues strictly.

✅ **According to the report, some protests were mostly related to operational methods and damage to crops and property of the people.**

✅ No harm has ever been inflicted upon farmers and their legitimate crops in Badakhshan province; and whenever individuals cause harm and loss to farmers covered by the eradication process, serious legal action is taken against them.

✅ **At the national level, the yield estimate has increased from 29 kg per hectare to nearly 34 kg per hectare.**

✅ The estimate of the yield increasing from 29 to 34 kg per hectare requires reliable field survey information, direct measurement of poppy capsules, and a scientific sampling method. Such an estimate cannot be determined solely based on theoretical analyses or estimation models, unless the model used has been validated with actual field data and its calculation method and margin of error are transparently presented.

✅ **From the 2026 opium production, the equivalent of 107 to 168 tons of heroin with a purity of 50-70% can be obtained.**

✅ The estimate of producing 107 to 168 tons of heroin with a purity of 50–70% relies on two disputed foundations: first, the estimated area of poppy cultivation, the accuracy of which is not confirmed; second, the volume of opium production, which cannot be verified without a reliable field survey and scientific measurement of the yield per hectare.

✅ Furthermore, converting opium to heroin depends on technical factors, including the conversion coefficient and the purity level of the product. Therefore, it is necessary to transparently present the information sources, calculation methods, and underlying assumptions; otherwise, this estimate lacks sufficient grounds for acceptance.

✅ **The price ratio of heroin to opium has decreased from 30 times in 2019 to 22 times in 2021, and to just over 9 times in 2026. The main reason for this decrease has been a greater increase in the price of opium compared to heroin.**

✅ Your statement regarding the decrease in the price ratio of heroin to opium from 30 times in the year 2019 to 22 times in the year 2021 and just over 9 times in the year 2026, requires providing the actual and comparable prices of both substances in the mentioned years, broken down by market location, data collection date, and heroin purity level. This ratio is obtained by dividing the price of each kilogram of heroin by the price of each kilogram of opium; therefore, without the original figures, the calculation cannot be independently verified, nor can the drop in the ratio be attributed solely to a higher increase in opium prices. Likewise, given that the production estimate is disputed and there is a lack of sufficient clarity regarding the price collection methodology, it is necessary to transparently present the information source, calculations, and factors affecting price changes.

✅ **Annually, UNODC reviews around 1,000 satellite images covering an area of more than 30,000 square kilometers.**

✅ If UNODC reviews about 1,000 satellite images annually with a total coverage of more than 30,000 square kilometers, the average coverage of each image would be more than 30 square kilometers. However, a spatial resolution of 0.5 meters alone is not sufficient to verify this area; because the actual dimensions of the images, the coverage rate, and the net area covered must be specified. Similarly, the estimate of 43,300 hectares of poppy cultivation is equivalent to 433 square kilometers; meaning it is about 1.44 percent of the claimed coverage of 30,000 square kilometers. This ratio alone does not prove the accuracy of the estimate. To validate the estimate, UNODC must provide the location of the images, acquisition dates, the method for selecting areas, the criteria for distinguishing poppies from other crops, the classification method, and the ground validation results.

✅ **Poppy cultivation among grains in Helmand has increased from 6% in 2025 to more than 50% in 2026.**

Given the lack of direct access to the targeted areas, the claim of poppy cultivation increasing among

grains from 6% to more than 50%, without a field survey and verifiable evidence, requires further clarity and documentation.

☑ **Walled-off land: In Helmand, the proportion share of walled-off land decreased from 81% to 42%; however, the absolute number of enclosed farms increased.**

The decrease in the proportion share of walled-off lands from 81% to 42%, simultaneously with an increase in the actual number of enclosed farms, requires the presentation of absolute numbers, calculation methods, and reviewable images. Given the lack of direct access to the areas, this claim cannot be verified without a field survey or independent evidence, and it is not sufficient on its own to prove a real increase in enclosed farms.

☑ **Staged cultivation: planting and harvesting are done at different times so that simultaneous identification and eradication become more difficult. The main objective of these methods is to reduce the risk of identification and total loss of the crop.**

The identification of staged cultivation, and its objective is to make the identification and eradication of poppy fields more difficult, cannot be definitively proven solely with one or two rounds of satellite imagery and without direct access to the area. To verify this claim, multi-stage images at different stages of growth and harvest, along with field survey information or independent evidence, are required. Otherwise, this conclusion is more of a hypothesis than a field-validated finding.

☑ **Securing land and capital for poppy cultivation is carried out through renting, advance payments, loans, pre-harvest sales, and sharecropping.**

☑ The claim regarding the securing of land and capital for poppy cultivation through renting, advance payments, loans, pre-harvest sales, and sharecropping requires economic evidence and direct information from farmers. In the absence of direct access to the area and conducting field interviews, it is not clear on what basis this information was collected and to what extent it represents the actual situation of farmers at the national level.

☑ **The price of dry opium has decreased from $780 in 2024 to $570 in 2025 and to slightly more than $500 in 2026, but it is still high.**

Your writing regarding the decrease in the price of dry opium from $780 in the year 2024 to $570 in 2025 and slightly more than $500 in 2026, must be documented by providing reliable sources, the location of price collection, the recording time, and the number of analyzed transactions. Without direct access to the markets and reliable evidence and documents to verify the accuracy of the figures, the representativeness of these figures for the country's different markets cannot be confirmed with certainty.

☑ **The Northeast accounts for about two-thirds of the total income from opium sales; more than $352 million.**

☑ Your note stating that more than $352 million, equivalent to about two-thirds of the total income from opium sales, is allocated to the northeastern regions requires the presentation of the baseline price calculation method, estimated sales volume, and a breakdown of income at the provincial level. In the absence of direct information from markets and documented economic evidence, the accuracy of this figure and the share of the Northeast out of the overall total income cannot be verified. Furthermore, when the hypotheses of poppy cultivation, opium production, and heroin production are not confirmed, these figures will not be correct.

☑ **Large regional differences in traders' purchase prices indicate that the Afghanistan opium market has not yet reached stability, and this situation may encourage domestic trafficking. In other words, some individuals or groups might purchase opium from the northeast of the country, where the most cultivation takes place, and resell it in areas like the southwest, where prices could be twice as high.**

☑ The difference in opium purchase prices across various regions of Afghanistan is not, in itself, definitive proof of the expansion of domestic trafficking or the organized transfer of opium from one region to another. Regional prices can be influenced by various factors, including

transportation costs, supply and demand levels, market access, product quality, trading risks, economic conditions, and law enforcement execution. Therefore, attributing price differences to traffickers' activities without examining other contributing factors has methodological limitations. Furthermore, the claim ofpurchasing opium from the northeast and reselling it in the southwest is presented in the provided text as a possibility, not as a documented and proven event. To verify such a claim, it is essential to provide specific evidence regarding transport routes, transaction volumes, transfer timing, and documented cases of seizure. Consequently, price differences alone cannot form the basis for a conclusion regarding an increase in domestic trafficking in Afghanistan.

✅ **In addition to farmers, opium income also generates economic activity for laborers, traders, transporters, and other local individuals.**

Your statement that opium income generates economic activity for laborers, traders, transporters, and other local individuals is a general conclusion without the presentation of field data and economic analysis. To evaluate it, the number of individuals dependent on these activities, their income levels, and the share of these activities in the local economy must be specified.

✅ **You have stated that during the 2026 poppy cultivation season, you collected qualitative information through informal field discussions with farmers, local residents, and individuals familiar with agricultural and economic conditions, and that these discussions were conducted in selected rural areas of the northeast.**

✅ Regarding the collection of information through informal discussions with farmers and local residents, it must be clarified in coordination with which official authorities and based on which permit or procedure these interviews were conducted.

✅ **Official figures on the poppy eradication process have not been shared by the current authorities with the UNODC office.**

✅ This has already been officially sent via an official letter (Maktoob); furthermore, the geographical coordinates of the poppy eradication fields have also been handed over to your representative.

Suggestions

1. The United Nations Office on Drugs and Crime (UNODC), which has prepared the draft of the Afghanistan annual drug report, must provide the poppy cultivation area data at the district (Wolaswali) level, so that the relevant bodies can express their views on the accuracy or inaccuracy of the provided figures.
2. In the event that the report is finalized by the relevant agencies, this report should not be published until the end of the poppy cultivation season. Because with the publication of this report and its reaching the ears of the farmers, those farmers who had previously abandoned poppy cultivation will be encouraged again and will resort to poppy cultivation, and this matter could cause an increase in poppy cultivation in the coming year.

