



Opium Poppy Cultivation in South-East Asia

Lao PDR, Myanmar



data collection

data transfer

data transfer

December 2009

PART 1. REGIONAL OVERVIEW

FACT SHEET - SOUTH EAST ASIA OPIUM SURVEYS 2009

	2008	2009	Change from
Opium poppy cultivation ¹	30,388 ha	33,811 ha	+11%
Of which			
Lao PDR	1,600 ha	1,900 ha	+19%
Thailand	288 ha	211 ha	-27%
Myanmar	28,500 ha	31,700 ha	+11%
Weighted average dry opium yield			
Lao PDR	6 kg/ha	6 kg/ha	0%
Thailand	15.6 kg/ha	15.6 kg/ha	0%
Myanmar	14.4 kg/ha	10.4 kg/ha	-28%
Potential production of opium ¹	424 mt	345 mt	-19%
Of which			
Lao PDR	9.6 mt	11.4 mt	+19%
Thailand	4.5 mt	3.3 mt	-27%
Myanmar	410 mt	330 mt	-20%
Opium poppy eradication	5,679.5 ha	4,939 ha	-13%
Of which			
Lao PDR	575 ha	651 ha	+13%
Thailand	284.5 ha	201 ha	-29%
Myanmar	4,820 ha	4,087 ha	-15%
Average price of opium			
Lao PDR	US\$ 1,227 /kg	US\$ 1,327 /kg	+8%
Thailand	US\$ 1,250 /kg	n/a	+17%
Myanmar	US\$ 301 /kg	US\$ 317 /kg	+5%
Total potential value of opium production	US\$ 140.4 million	> US\$ 119 million	n/a
Of which			
Lao PDR	US\$ 11.8 million	US\$ 15.1 million	+28%
Thailand	US\$ 5.6 million	n/a million	n/a
Myanmar	US\$ 123 million	US\$ 104 million	-15%

The Office of the Narcotics Control Board, Government of Thailand, is acknowledged for providing the figures on Thailand.

¹ These figures differ slightly from those published in the World Drug Report 2008 and 2009, which subsumes Thailand under the category of "other countries".

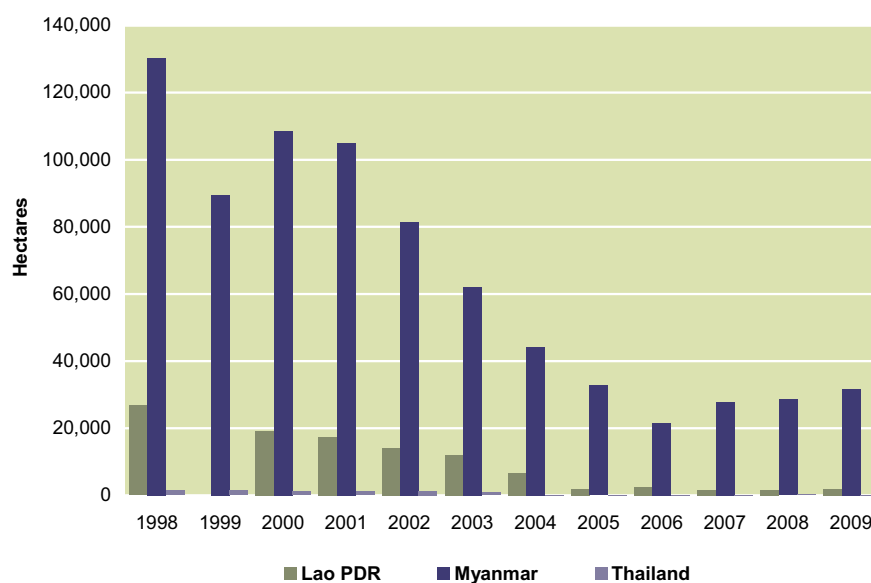
REGIONAL OVERVIEW

In order to assess the scope of opium poppy cultivation and opium production, UNODC has been carrying out opium surveys in cooperation with the respective Governments in Lao PDR (since 1992) and in Myanmar (since 2002), whereas Thailand has established its own monitoring system. This report contains the results of the UNODC supported opium poppy cultivation surveys in Lao PDR and Myanmar. In addition, the results from the opium poppy surveys implemented by the Thai Office of the Narcotics Control Board are presented in this regional overview.

Opium poppy cultivation in South East Asia

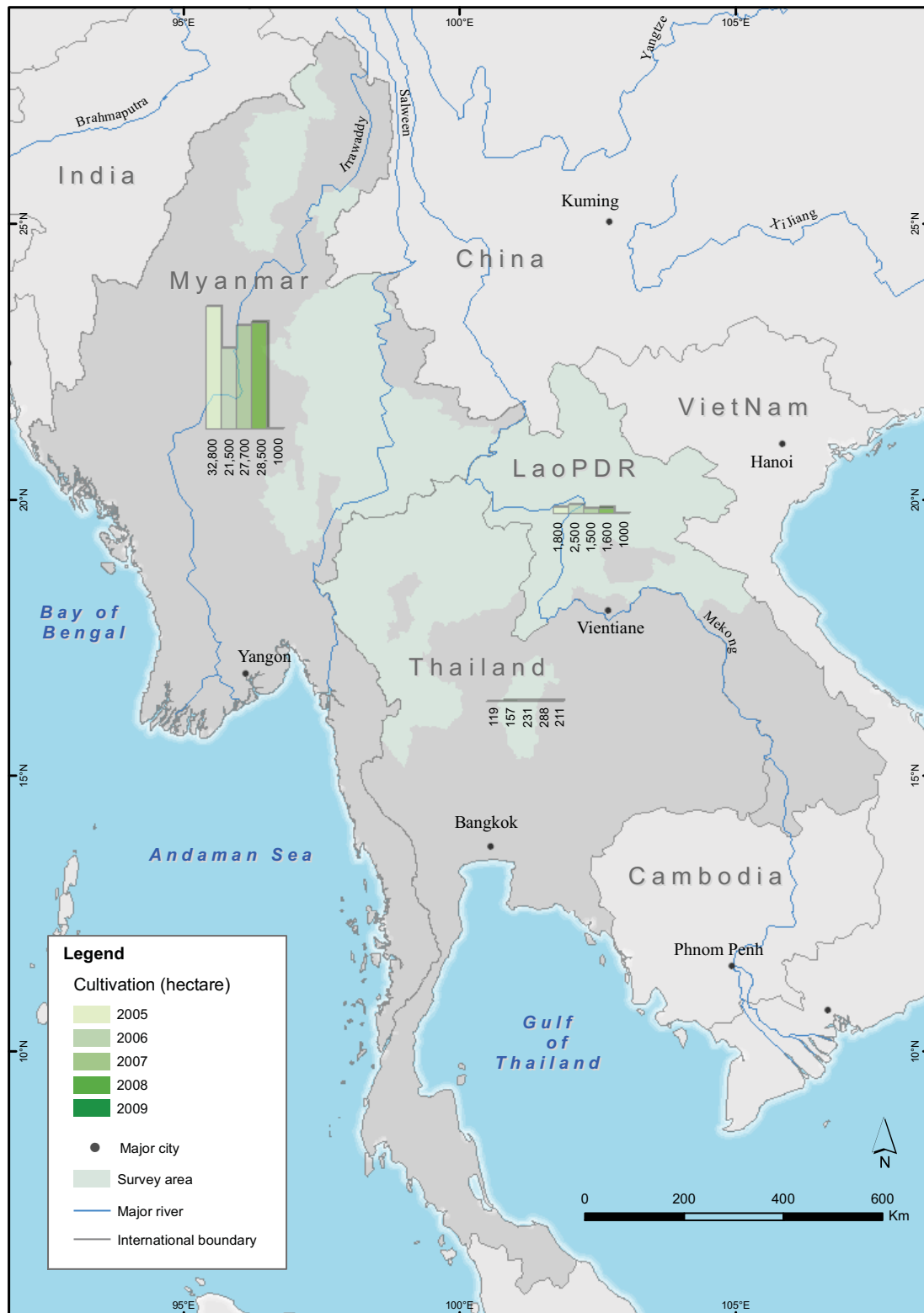
The major part of opium poppy cultivation in South East Asia takes place in Lao PDR, Myanmar and Thailand. The Government of Vietnam indicates that only a negligible amount of opium poppy is cultivated there. Between 1988 to 2006, the cultivation of opium in these three countries decreased from an estimated total of 157,900 hectares in 1998, to only 24,157 hectares in 2006. However, since then, opium poppy cultivation has increased in Myanmar and a mixed pattern of increases and decreases has been observed in Lao PDR and Thailand. Overall, opium poppy cultivation has increased in the region since 2006.

Figure 1: Opium poppy cultivation in South East Asia (hectares), 1998 - 2009



Myanmar, the largest opium growing country in the region, has seen major decreases over the years from 130,300 ha in 1998 to only 21,500 ha in 2006 (an 83% reduction over the period 1998-2006). The downward trend from 2000 to 2006 had been consistent. Since then, opium poppy cultivation has increased although at a relatively slow pace.

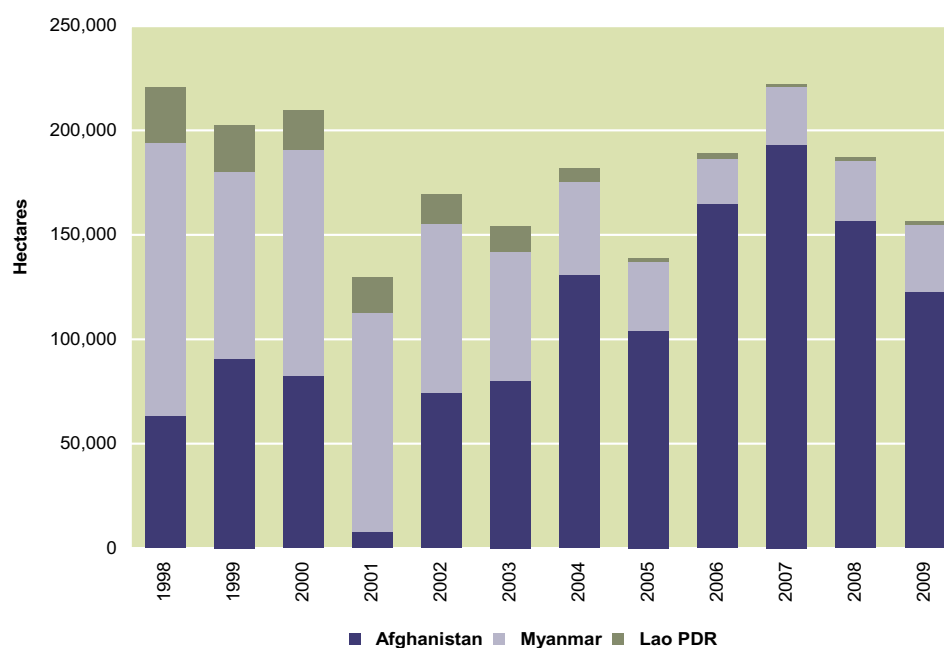
Map 1: Opium poppy cultivation in South East Asia (hectares), 2005 - 2009



The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations.

In Lao PDR, the area under opium poppy decreased from 26,800 ha in 1998 to only 1,600 ha in 2008. This represents a reduction in the area under cultivation by 94%, the largest percentage decline among the three countries. As compared to 2008 however, figures show an increase of 300 ha. This is still insignificant and cannot diminish the efforts of the Laotian government in reducing poppy cultivation in their country. The figures reported by the Thai Government indicated a reduction of its opium poppy cultivation area from 1,486 ha in 1998 to 211 ha in 2008 (a decline of 86%). Lao PDR and Thailand have both reached such low levels of opium poppy cultivation that they no longer produce opium for the international market.

Figure 2: Opium poppy cultivation in major cultivating countries (ha), 1998 - 2009

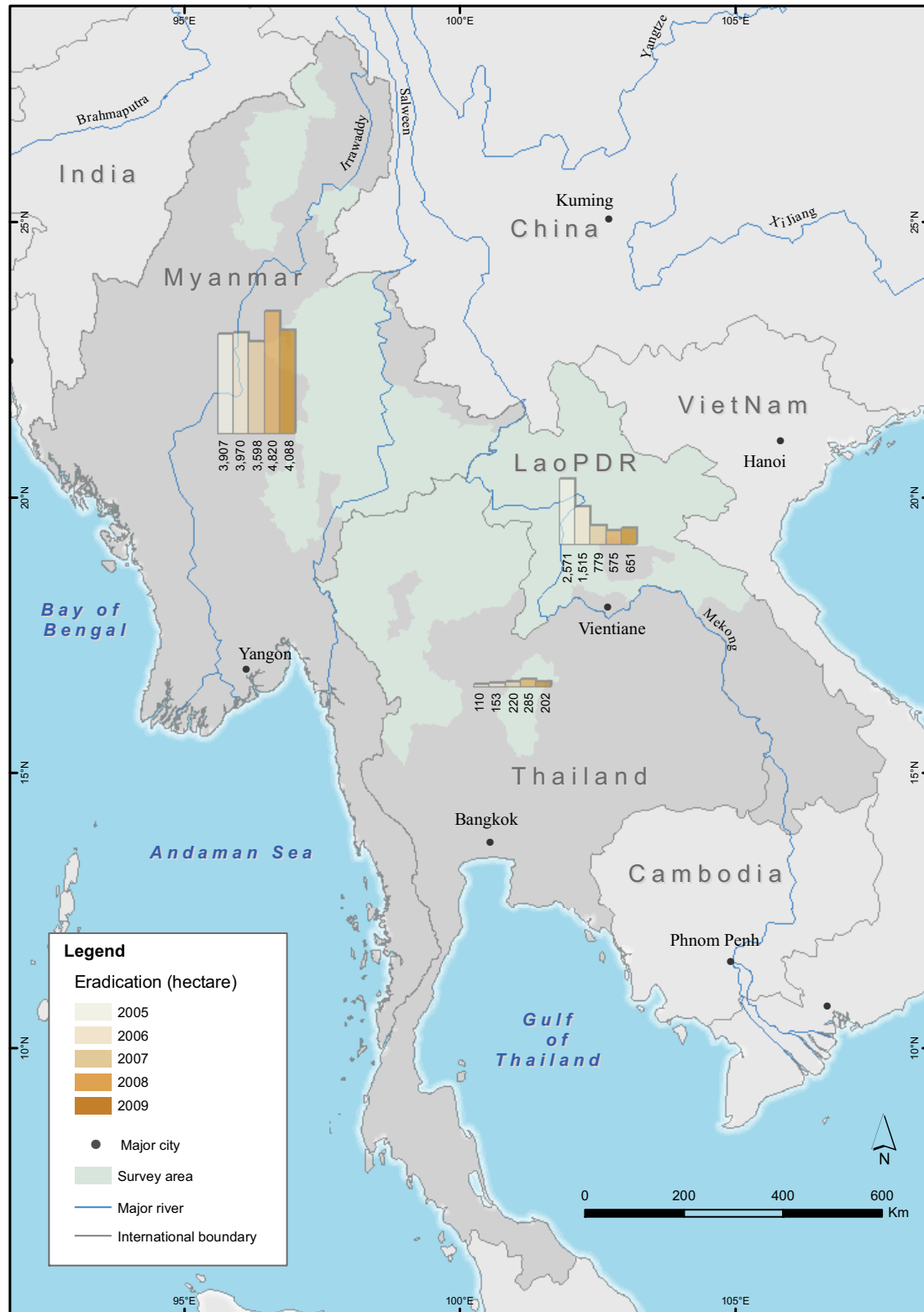


Despite years of decrease between 1998 and 2006, Myanmar is still the second largest opium poppy grower in the world after Afghanistan. Myanmar contributed 20% of opium poppy cultivation in major cultivating countries in 2008. Lao PDR accounted for less than 1% in 2009. Since 2003, South East Asia has clearly ceased to be the largest opium poppy cultivating region, and Afghanistan became the by far the largest opium poppy cultivating country.

Eradication

Official reports from the Governments of Lao PDR, Myanmar and Thailand indicate that a total of 4,939 hectares of opium poppy were eradicated in 2009. This represents a decrease of 13% compared to 2008, when 5,679 ha were eradicated in the region. A total of 651 ha were eradicated in Lao PDR, 4,087 ha in Myanmar and 201 ha in Thailand.

Map 2: Opium poppy eradication in South East Asia (hectares), 2005 - 2009

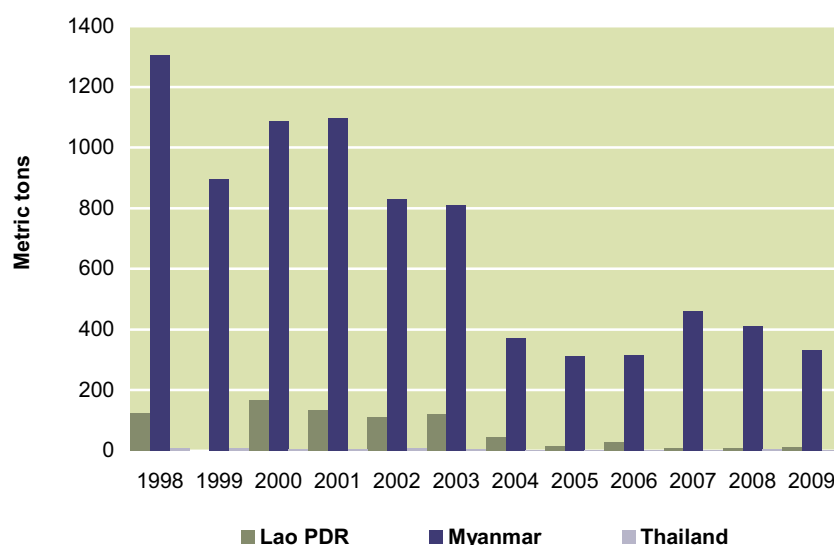


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Opium yield and production

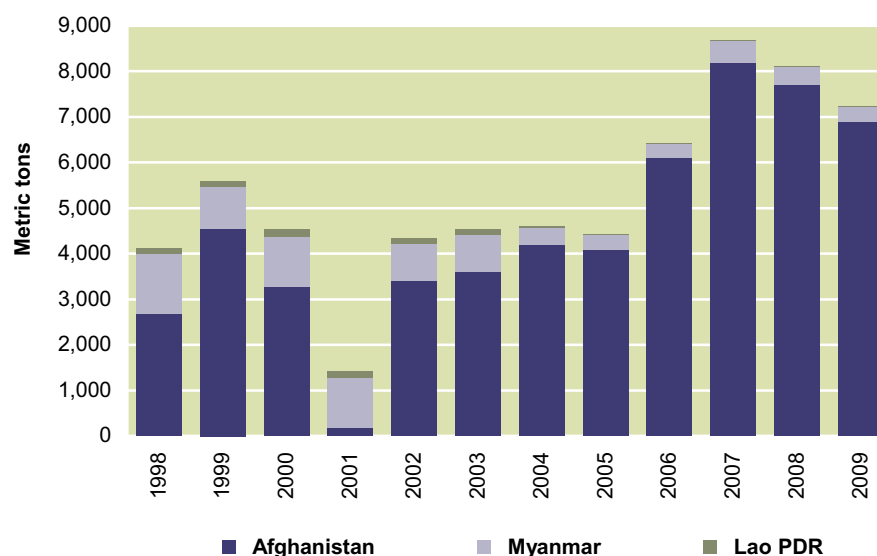
Opium poppy in South East Asia is mostly cultivated on steep hills with poor soil and no irrigation facilities. Opium yields are much lower than in Afghanistan where the crop is often cultivated on good soil and irrigated land. In 2009, opium yields were estimated at 6 kg/ha in Laos, 10.4 kg/ha in Myanmar and 15.6 kg/ha in Thailand. The total potential opium production in South East Asia has decreased from an estimated 1,435 mt in 1998² to only 345 mt in 2009, which represents a decrease of 76%.

Figure 3: Opium production in South East Asia (metric tons), 1998 - 2009



Myanmar is still the second largest producer of illicit opium after Afghanistan. However, its share of opium production of major producing countries fell from 32% in 1998 to only just 5% in 2009.

Figure 4: Opium production in major producing countries (metric tons), 1998 - 2009

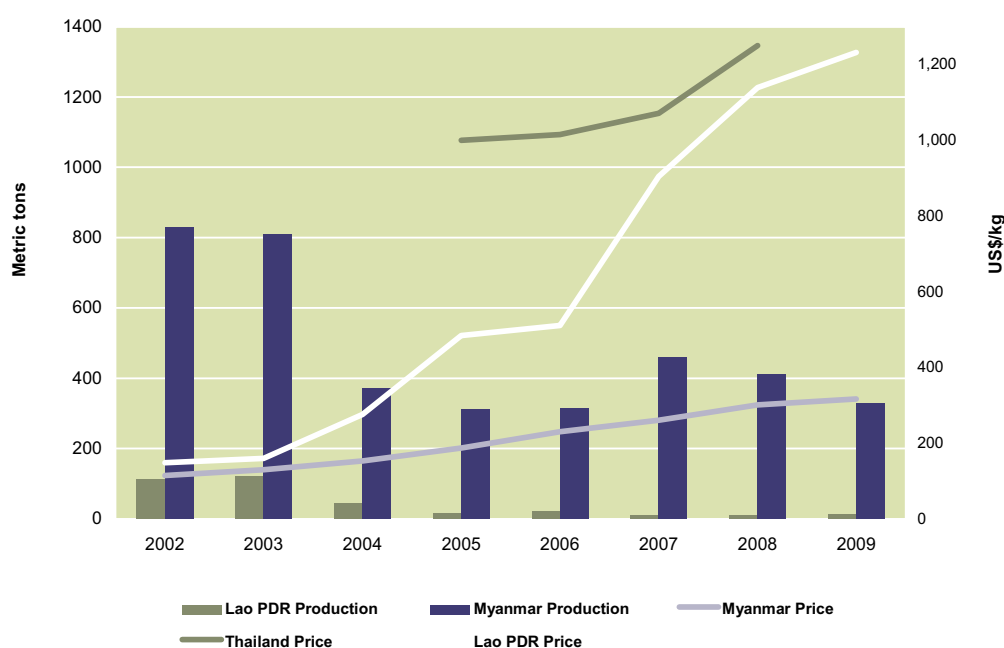


² Source: World Drug Report 2006.

Opium prices

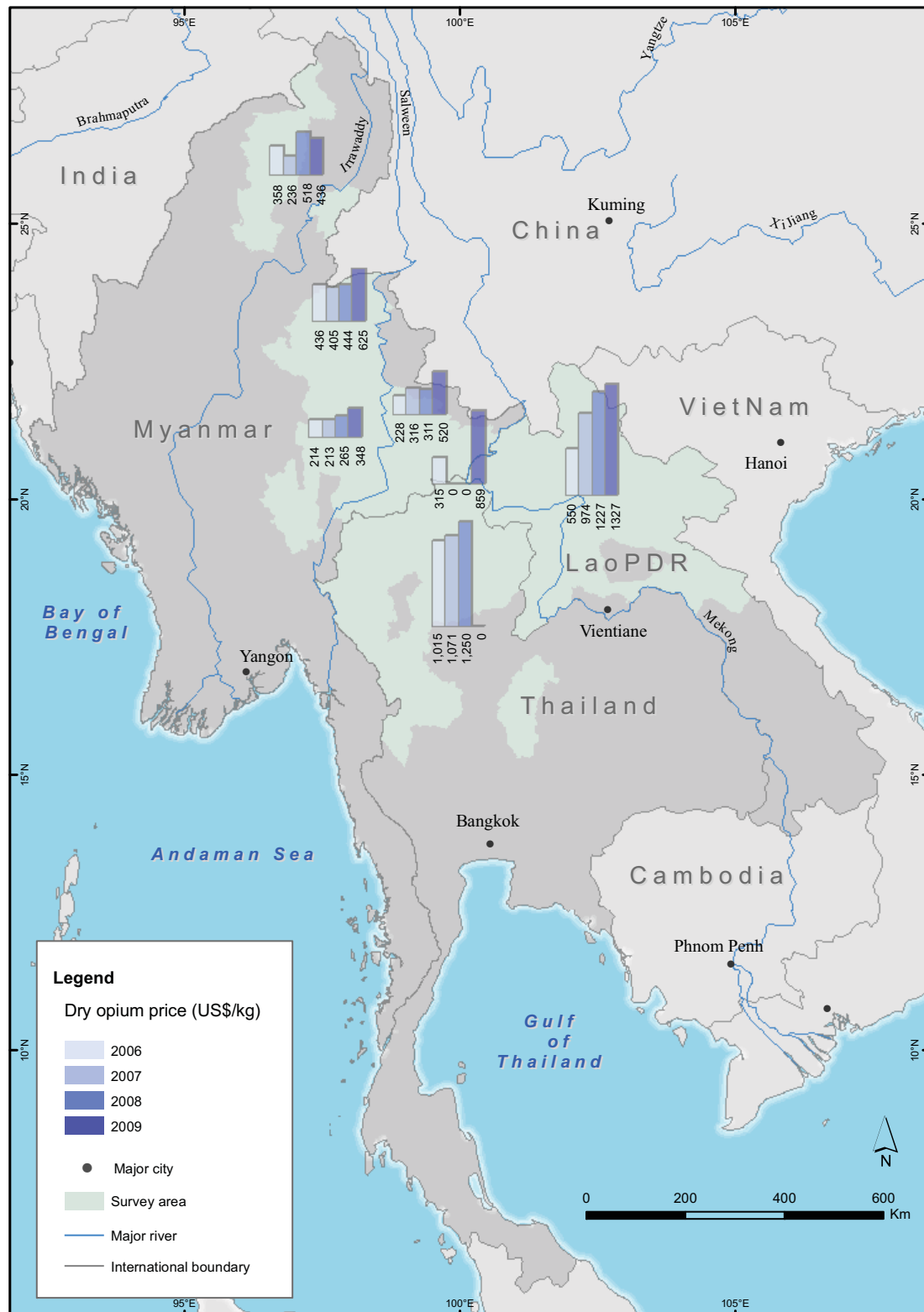
Opium prices in South East Asia have increased over the past years and there are pronounced price differences between countries as well as between regions within these countries. In 2009, the average price of opium was at a very high level in Lao PDR with prices of US\$ 1,327/kg, and similar to the situation in previous years, much lower in Myanmar (US\$ 317/kg at the farm-gate).³ No prices in Thailand were reported for 2009. The steep price upsurge in Lao PDR continues to be due to the scarcity of opium in the country. In some regions, opium cultivation has been completely eliminated or is very scarce, while demand is still relatively high compared to the small amounts of opium produced locally. In Myanmar, by far the largest producer, prices rose much slower, from US\$ 261/kg to US\$ 317/kg from the year 2007 to 2009.

Figure 5: Opium production and prices in cultivating areas in Lao PDR, Myanmar, and Thailand, 2002 - 2009



³ Prices in Lao PDR and Myanmar are not directly comparable as they refer to farm-gate prices in Myanmar and to prices in the Northern region at an unspecified trading level in Lao PDR.

Map 3: Prices of opium in South East Asia (US\$/kg), 2009



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