



South-East Asia Opium survey 2010

Lao PDR, Myanmar

South-East Asia: Opium Survey 2010

13 December 2010

Launch at the
Foreign
Correspondents Club
of Thailand

PRESENTATION STRUCTURE

1. OVERVIEW

- Cultivation
- Yield
- Production
- Eradication
- Prices

2. LAO PDR

3. MYANMAR

4. CONCLUSIONS



1. OVERVIEW



Flowering-stage poppy

CULTIVATION

Lao PDR – up
Myanmar – up
Thailand – up

Map 1: Opium poppy cultivation in South East Asia (hectares), 2006 - 2010

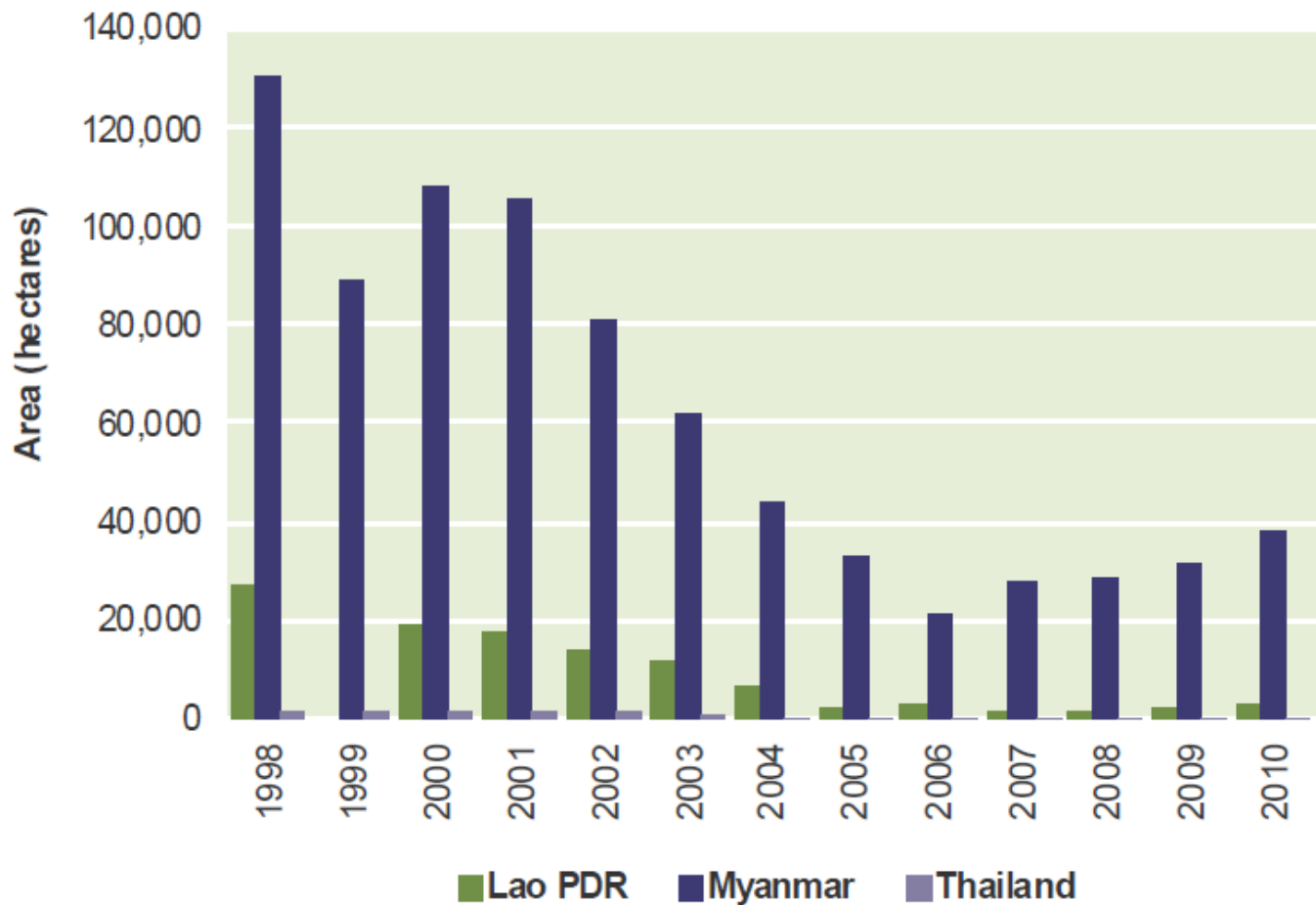


	2009	2010	Change from
Opium poppy cultivation ¹	33,811 ha	41,389 ha	+22%
Lao PDR	1,900 ha	3,000 ha	+58%
Thailand	211 ha	289 ha	+37%
Myanmar	31,700 ha	38,100 ha	+20%

Source: Government of Lao PDR, Myanmar and Thailand; national monitoring system supported by UNODC in Lao PDR and Myanmar

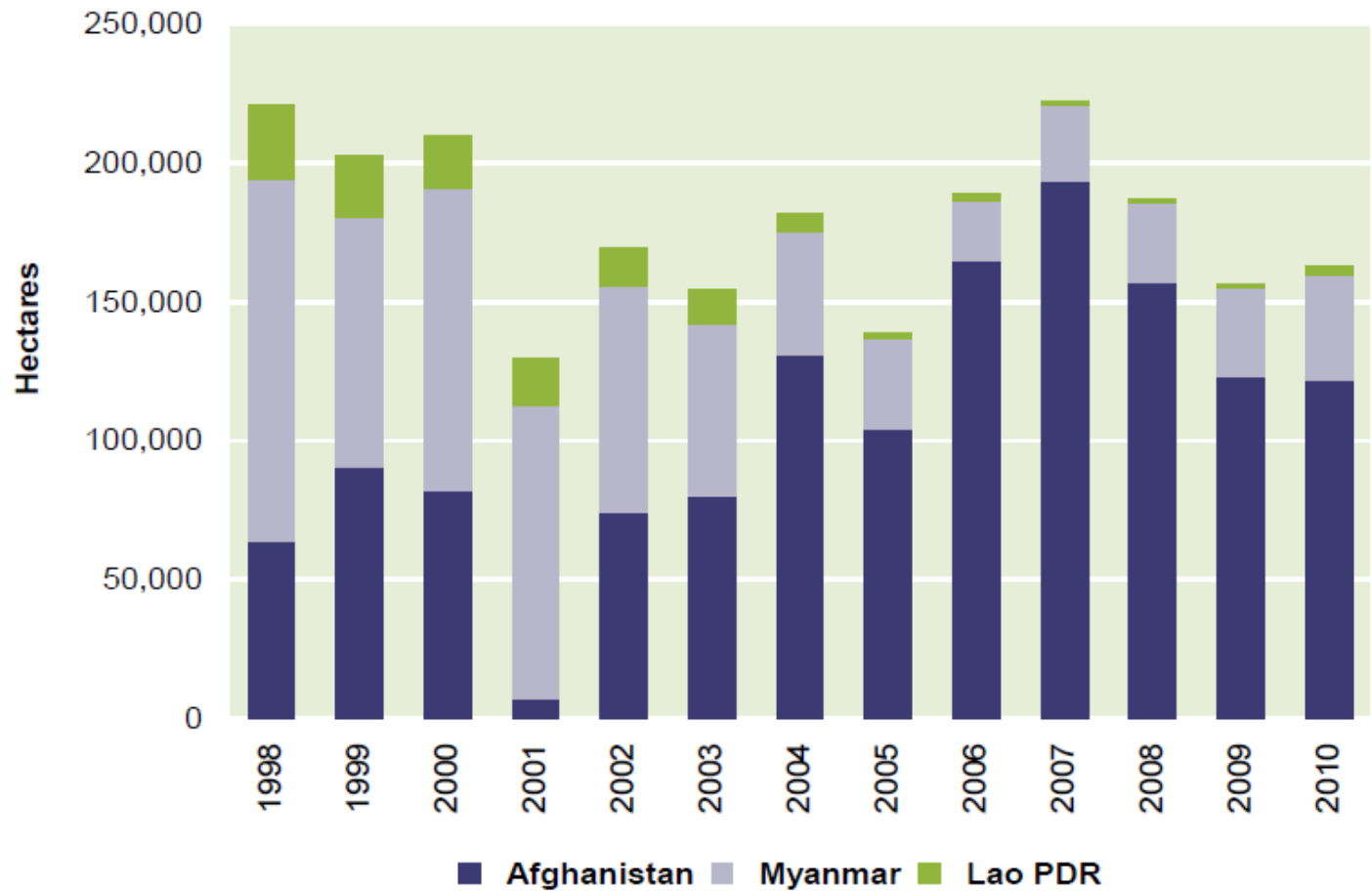
CULTIVATION – SE Asia

Figure 1: Opium poppy cultivation in South East Asia (hectares), 1998 - 2010



CULTIVATION – Global

Figure 2: Opium poppy cultivation in major cultivating countries (ha), 1998 - 2010



YIELD

	2009	2010	Change from
Weighted average dry opium yield			
Lao PDR	6.0 kg/ha	6.0 kg/ha	0%
Thailand	15.6 kg/ha	15.6 kg/ha	0%
Myanmar	10.4 kg/ha	15.2 kg/ha	+46%

Lao PDR – same

Myanmar – up

Thailand – same

PRODUCTION

	2009	2010	Change from
Potential production of opium ¹	345 mt	603 mt	+75%
Lao PDR	11 mt	18 mt	+58%
Thailand	3 mt	5 mt	+36%
Myanmar	330 mt	580 mt	+76%

Lao PDR – up
Myanmar – up
Thailand – up

- = 16% global production**
- increased Ha**
- increased yield**

ERADICATION

	2009	2010	Change from
Opium poppy eradication	4,939 ha	9,125 ha	+85%
Lao PDR	651 ha	579 ha	-11%
Thailand	201 ha	278 ha	+38%
Myanmar	4,087 ha	8,268 ha	+102%

Lao PDR – down

Myanmar – up

Thailand – up

PRICES

	2009	2010	Change from
Average price of opium ²			
Lao PDR	1,327 US\$/kg	1,670 US\$ /kg	+26%
Thailand	n/a	2,700 US\$/kg	n/a
Myanmar	317 US\$ /kg	305 US\$/kg	-4%

Lao PDR – up

Myanmar – slightly down

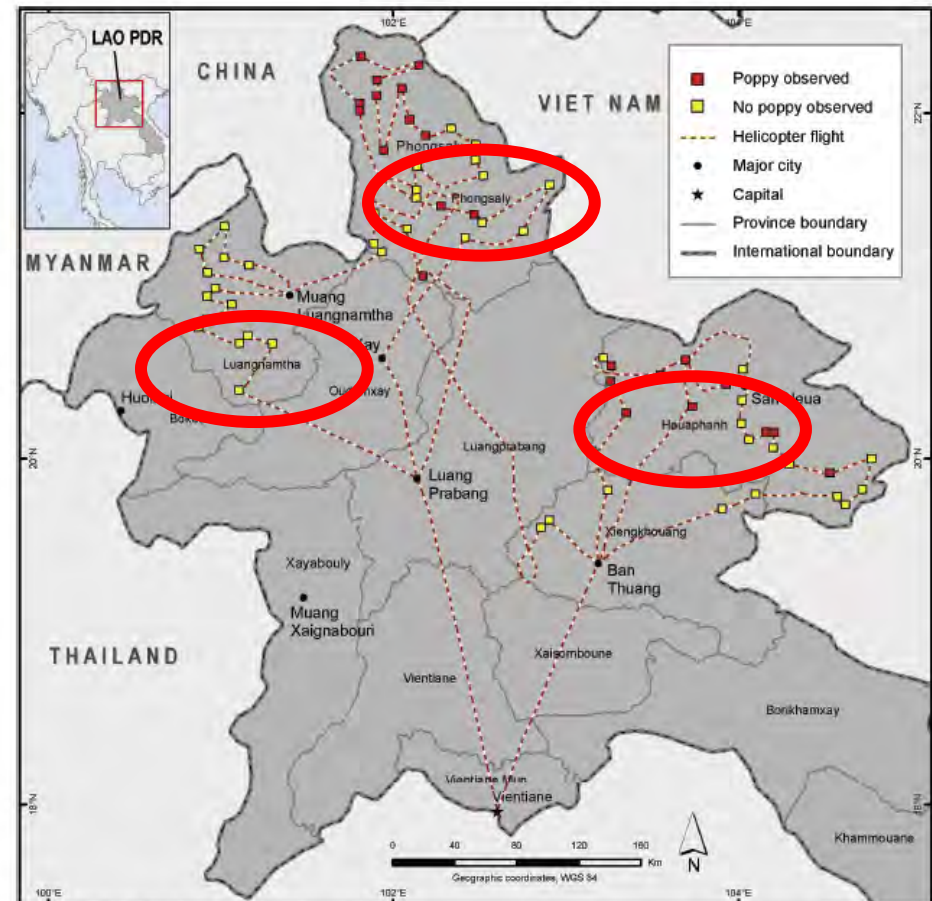
Thailand – n/a

2. LAO PDR

LAO PDR – Helicopter survey



Map 1: Sample segments surveyed by helicopter, Northern Lao PDR, 2010

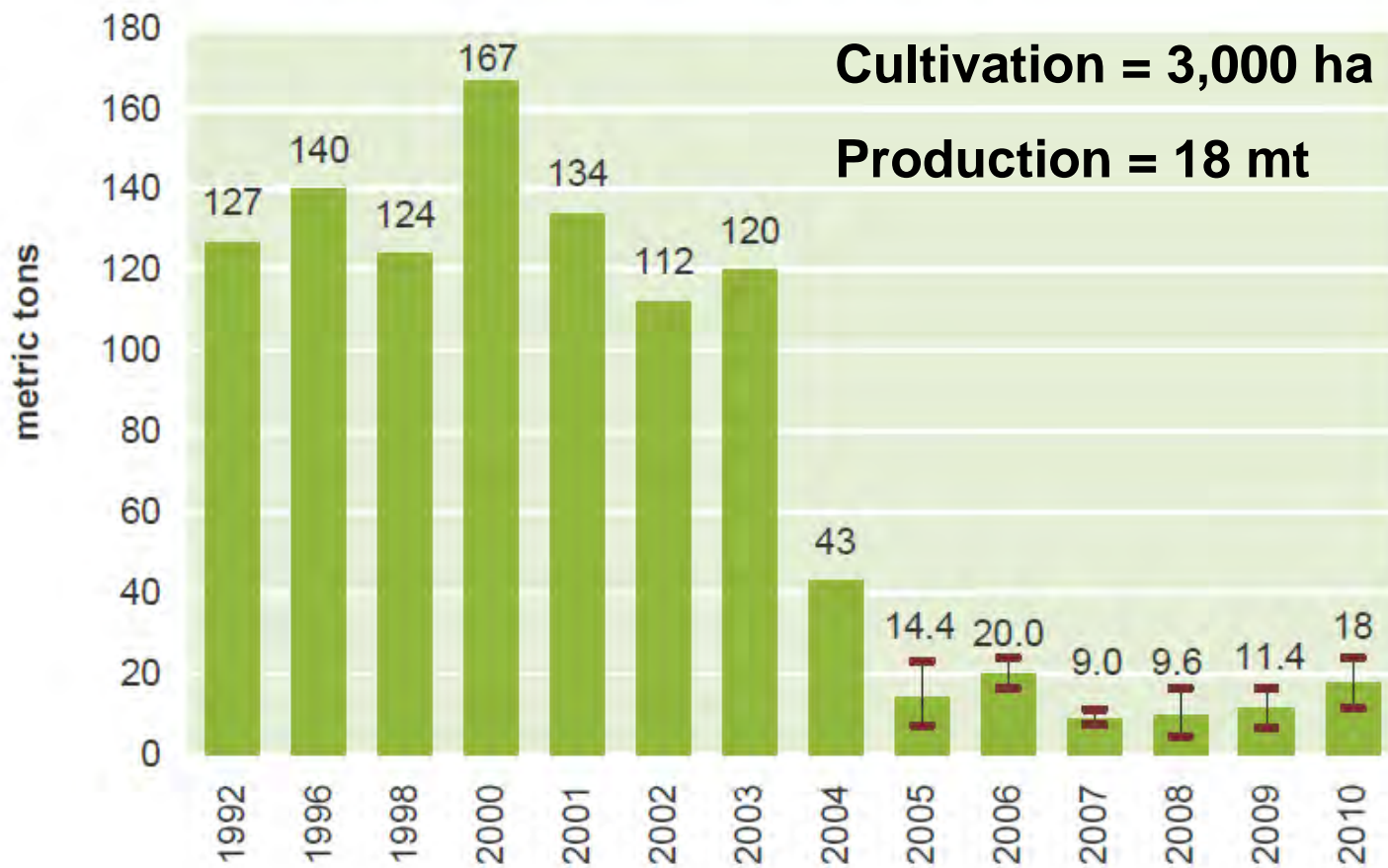


Source: Government of Lao PDR - National monitoring system supported by UNODC
The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations

- Helicopter survey
- Sample sites
- 6 provinces
- Northern Lao PDR

LAO PDR – Cultivation

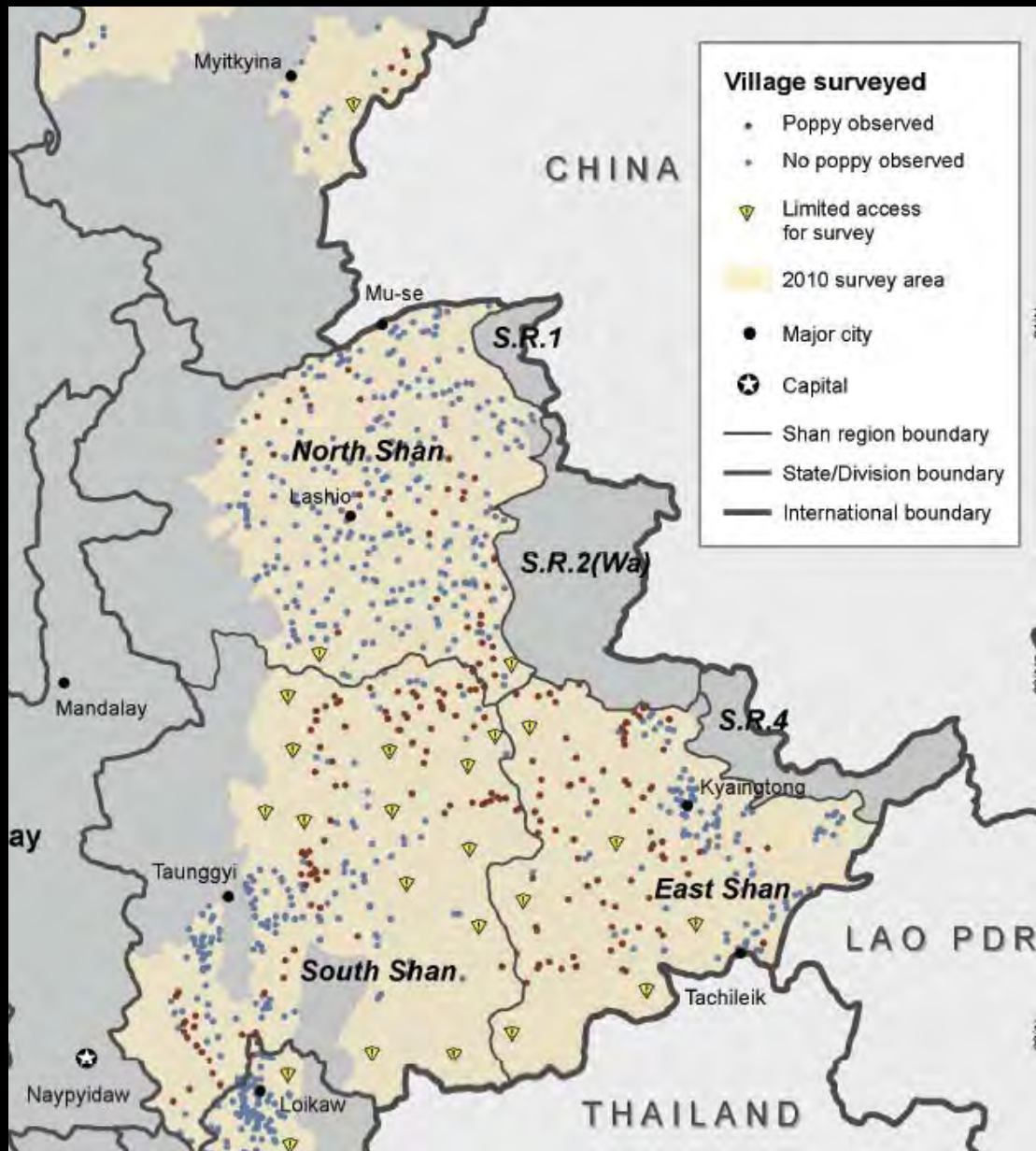
Figure 4: Potential opium production (metric tons), 1992 - 2010



3. MYANMAR

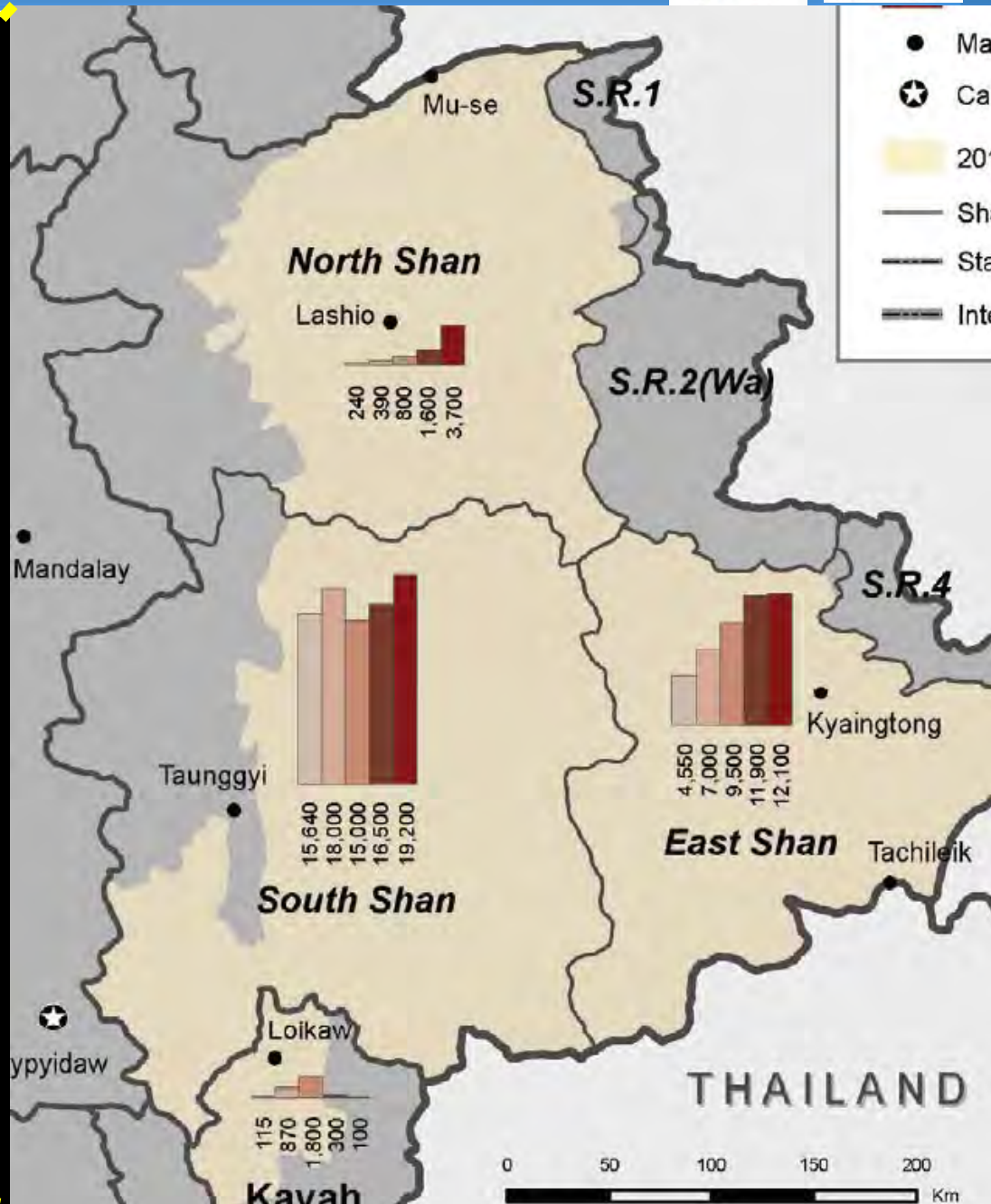
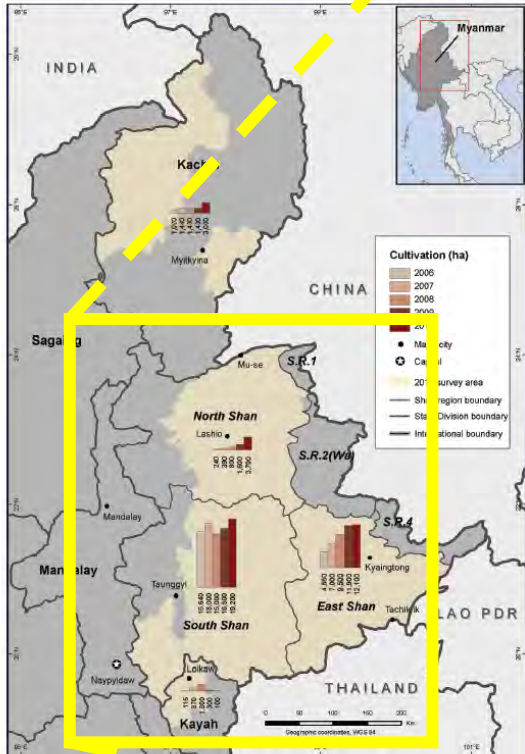
Satellite Survey

- Detailed satellite images
- Statistical sampling approach
- Systematic field verification of all satellite images
- Socio-economic survey of villages



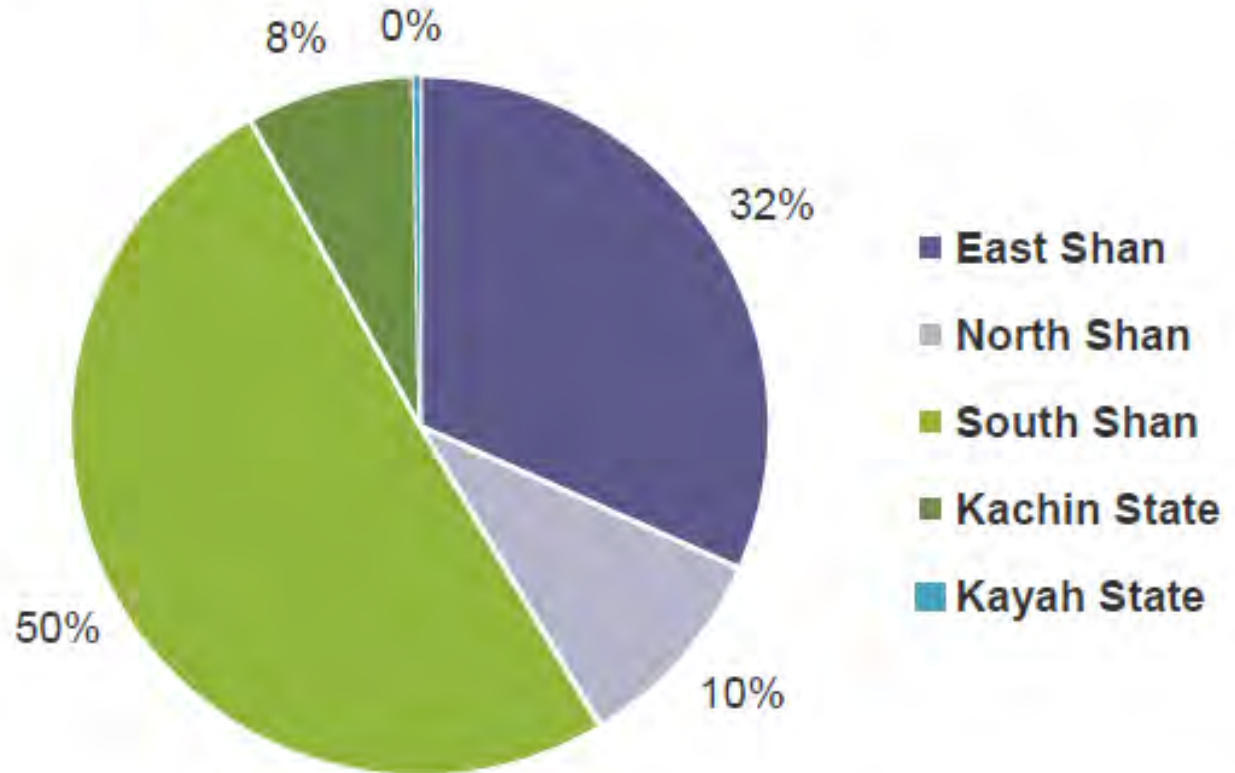
Cultivation

Map 1: Opium poppy cultivation in Kachin, Kayah and Shan States, Myanmar 2006-2010



Cultivation

Figure 4: Opium poppy cultivation shares by state in 2010





UNODC

United Nations Office on Drugs and Crime



Central Committee for
Drug Abuse control

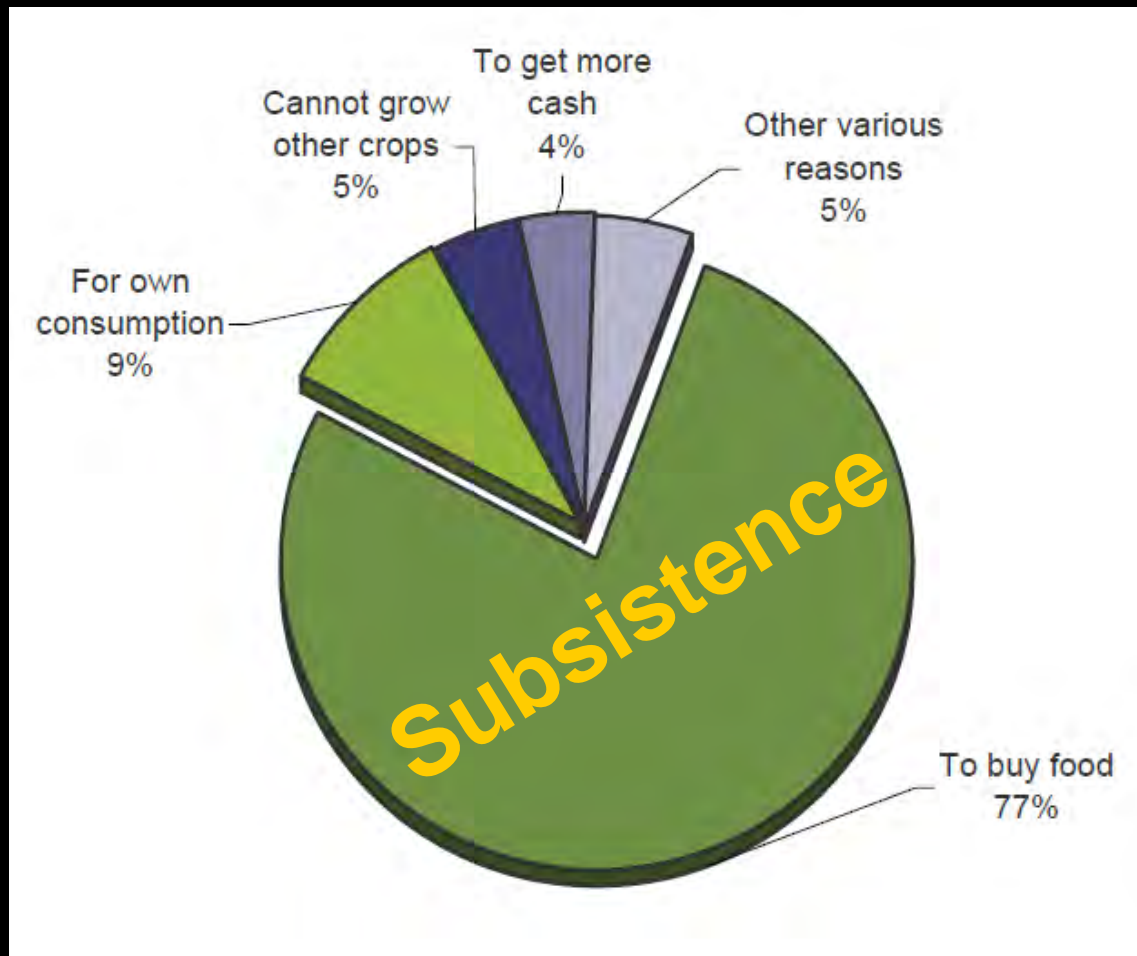


Lao National Commission for
Drug Control and Supervision

FOOD SECURITY

**Percentage of
households that had
enough rice for 12
months**

Reasons for farmers to grow poppy



**Est. # households involved in poppy cultivation
= 224,000**

% of income derived from opium poppy cultivation

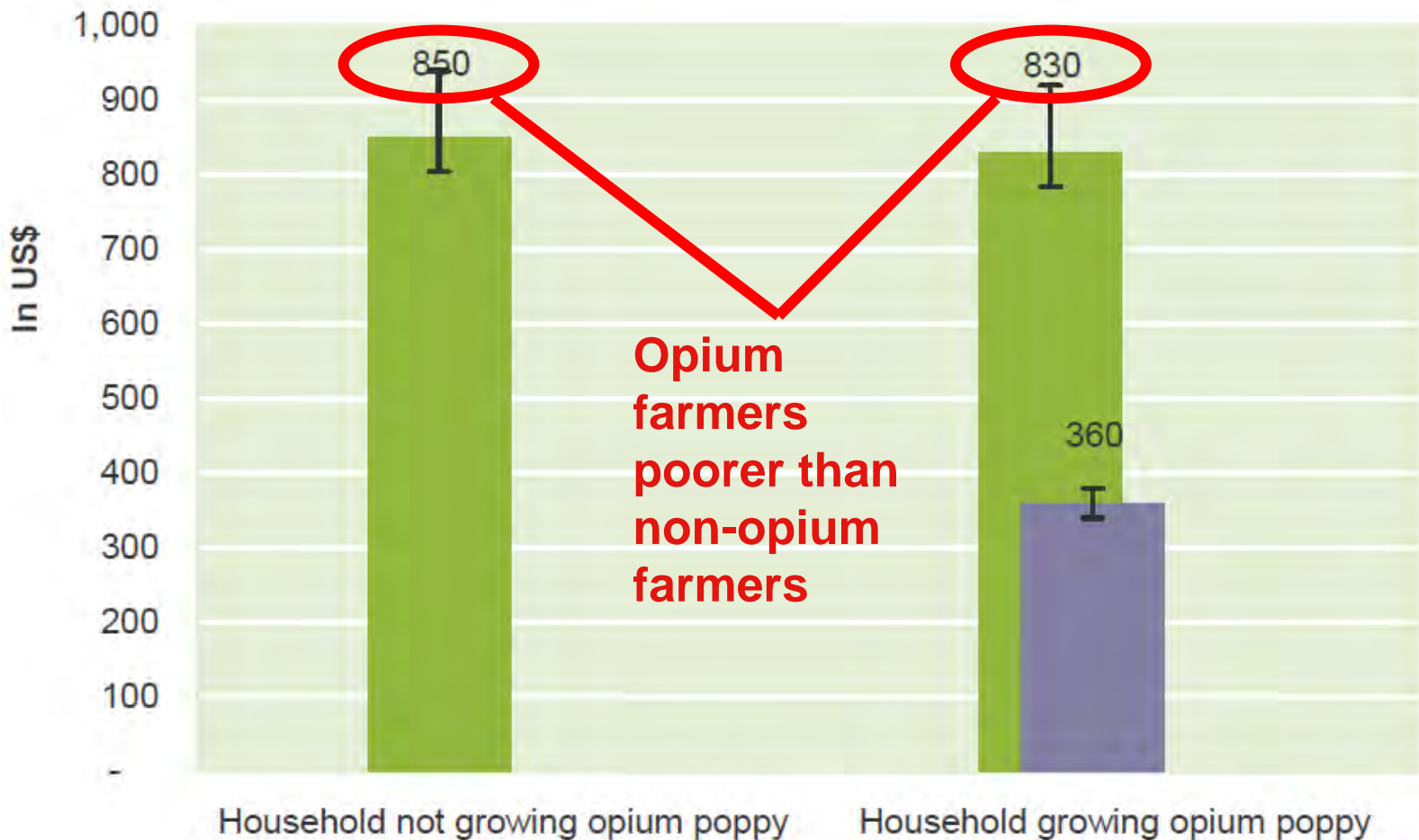
2003 = 70%

2008 = 20%

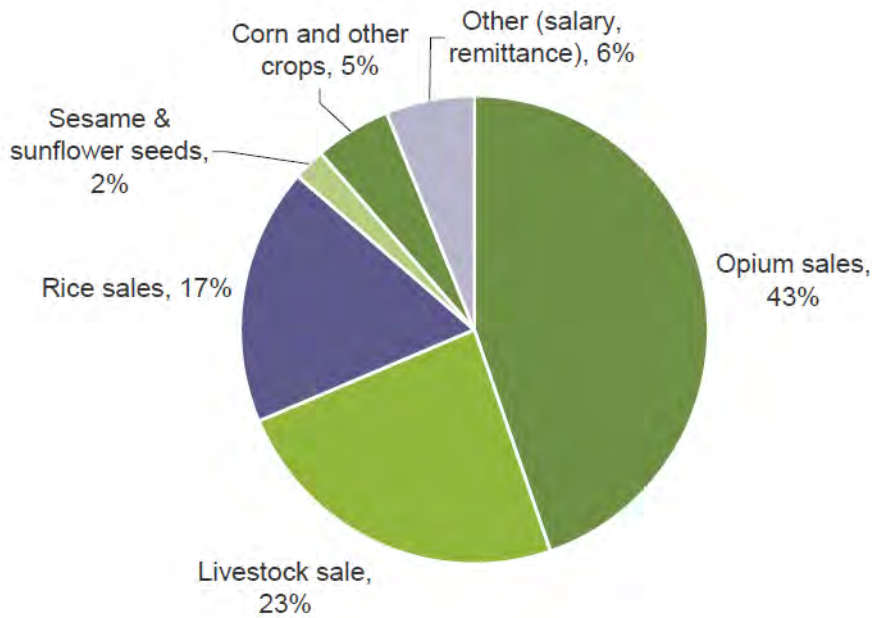
2009 = 43%

**Est. # households involved in poppy cultivation (2009)
= 224,000**

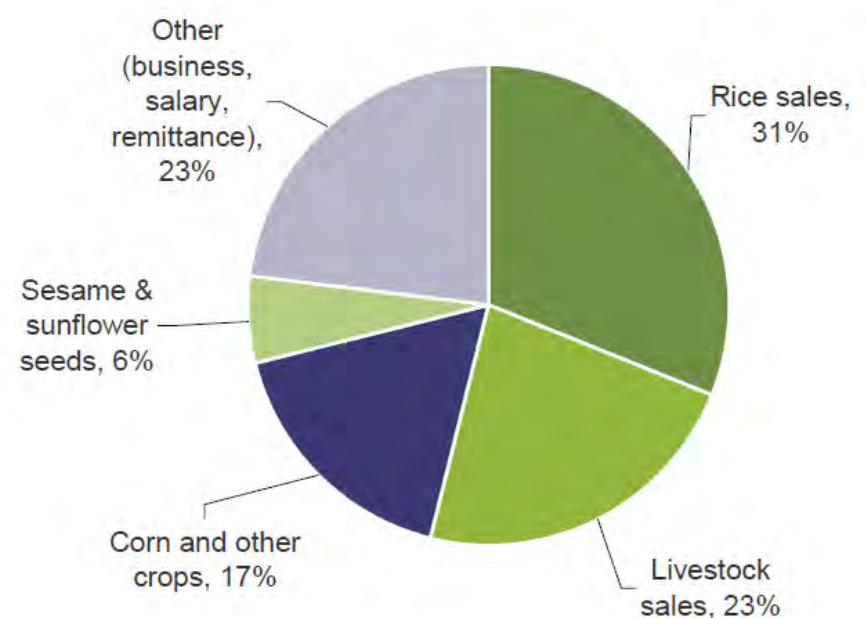
Total average income of households in Shan State (US\$/year) asked for 2009



Sources of income – Shan State villages (2010)



Poppy village



Non-poppy village

Many farmers who stopped growing poppy

- Had to purchase food on credit
- Had to borrow food
- Had to rely on relatives / friends

**Est. # households involved in poppy cultivation (2009)
= 224,000**

Food security

Region	In 2008	In 2009
Kachin	72%	83%
Kayah	49%	90%
East Shan	53%	60%
North Shan	64%	52%
South Shan	83%	60%
Total	72%	61%

Poppy village

Region	In 2008	In 2009
Kachin	87%	85%
Kayah	84%	69%
East Shan	60%	79%
North Shan	73%	51%
South Shan	88%	69%
Total	78%	65%

Non-poppy village



UNODC

United Nations Office on Drugs and Crime



Central Committee for
Drug Abuse control



Lao National Commission for
Drug Control and Supervision

4.

CONCLUSIONS

Conclusions

- 1. Opium problem getting more severe**
- 2. Food security has deteriorated**
- 3. Insecurity – conflict prevents access**
- 4. Poverty also impacting environmental change – timber harvesting, NTFP**
- 5. Few international organizations engaging in Shan State on food insecurity and poverty**
- 6. Solutions must involve emergence of peace**
- 7. Funding required**

THANK YOU

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