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United Nations Office on Drugs and Crime



Central Committee for
Drug Abuse control



Lao National Commission for
Drug Control and Supervision



South-East Asia Opium survey 2011

Lao PDR, Myanmar

South-East Asia: Opium Survey 2011

15 December 2010

**Launch at the
Foreign
Correspondents' Club
of Thailand**

PRESENTATION STRUCTURE

- 1. BIG PICTURE**
- 2. REPORT OVERVIEW**
- 3. MYANMAR**
- 4. LAO PDR**
- 5. CONCLUSIONS**



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1. BIG PICTURE

The Big Picture

“Containment” has worked during past decade

- Number of users level at 4.5% adult population
- Opiate cultivation declines globally over past 2 decades
- Coca/cocaine declines globally over past 2 decades
- Cultivation is limited to a few countries
- ATS use stabilizes across globe

WARNING SIGNS

- **SE Asia: soaring production, trafficking, use of ATS**
- **SE Asia: resurgence of opium cultivation**



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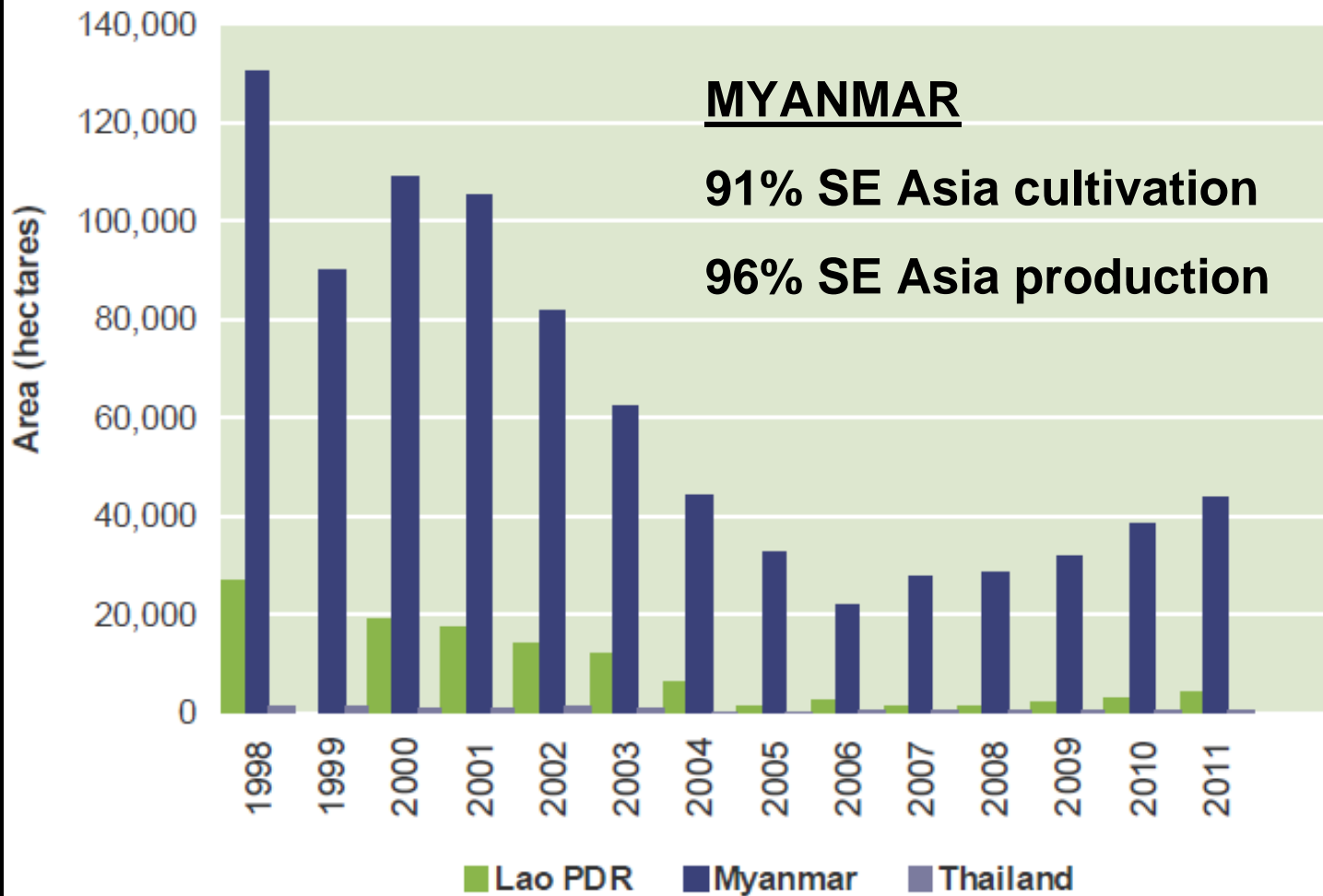
2. REPORT OVERVIEW

CULTIVATION

- Has doubled in SE Asia since 2006
- Myanmar is still world's second largest illicit poppy cultivator after Afghanistan (approx. 23% world cultivation; approx. 10% world production)
- Myanmar: 2011 trend = up
- Lao PDR: 2011 trend = up

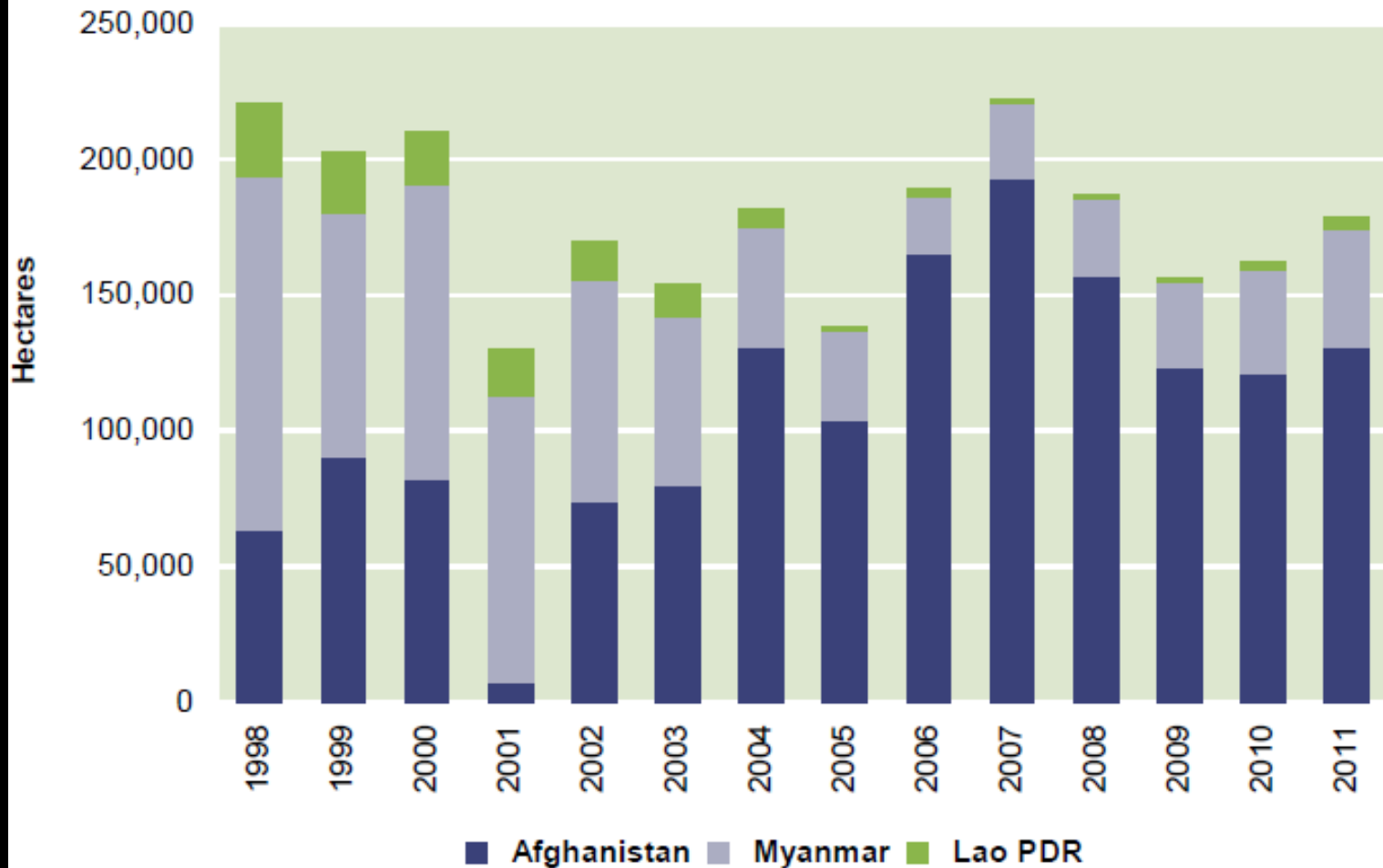
CULTIVATION – SE Asia

Opium poppy cultivation in South East Asia (hectares), 1998 - 2011



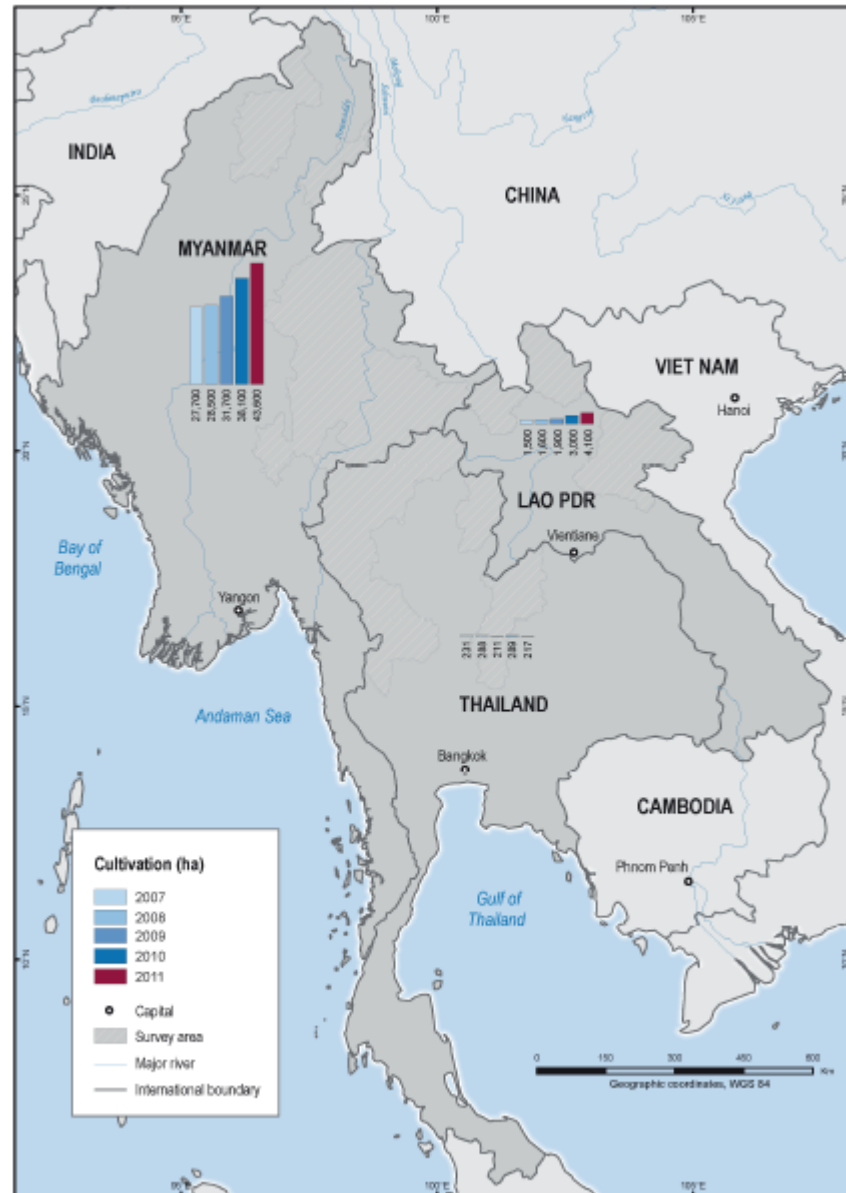
CULTIVATION – Global comparisons

Opium poppy cultivation in major cultivating countries (ha), 1998 - 2011



CULTIVATION

Map 1: Opium poppy cultivation in South East Asia (hectares), 2006 - 2011



Source: Government of Lao PDR, Myanmar and Thailand, national monitoring system supported by UNODC in Lao PDR and Myanmar.
The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations.



CULTIVATION

	2010	2011	Change from
Opium poppy cultivation	41,389 ha	47,917 ha	+16%
Lao PDR	3,000 ha	4,100 ha	+37%
Thailand	289 ha	217 ha	-25%
Myanmar	38,100 ha	43,600 ha	+14%

PRODUCTION

Potential production of opium	603 mt	638 mt	+6 %
Lao PDR	18 mt	25 mt	+37%
Thailand	5 mt	3 mt	-25%
Myanmar	580 mt	610 mt	+5%

MARKET VALUE

Total potential value of opium production	> US\$ 219 million	> US\$ 319 million	+46 %
Of which			
Lao PDR	US\$ 30 million	US\$ 40 million	+34 %
Thailand	US\$ 12 million	US\$ 4 million	-65 %
Myanmar	US\$ 177 million	US\$ 275 million	+56 %



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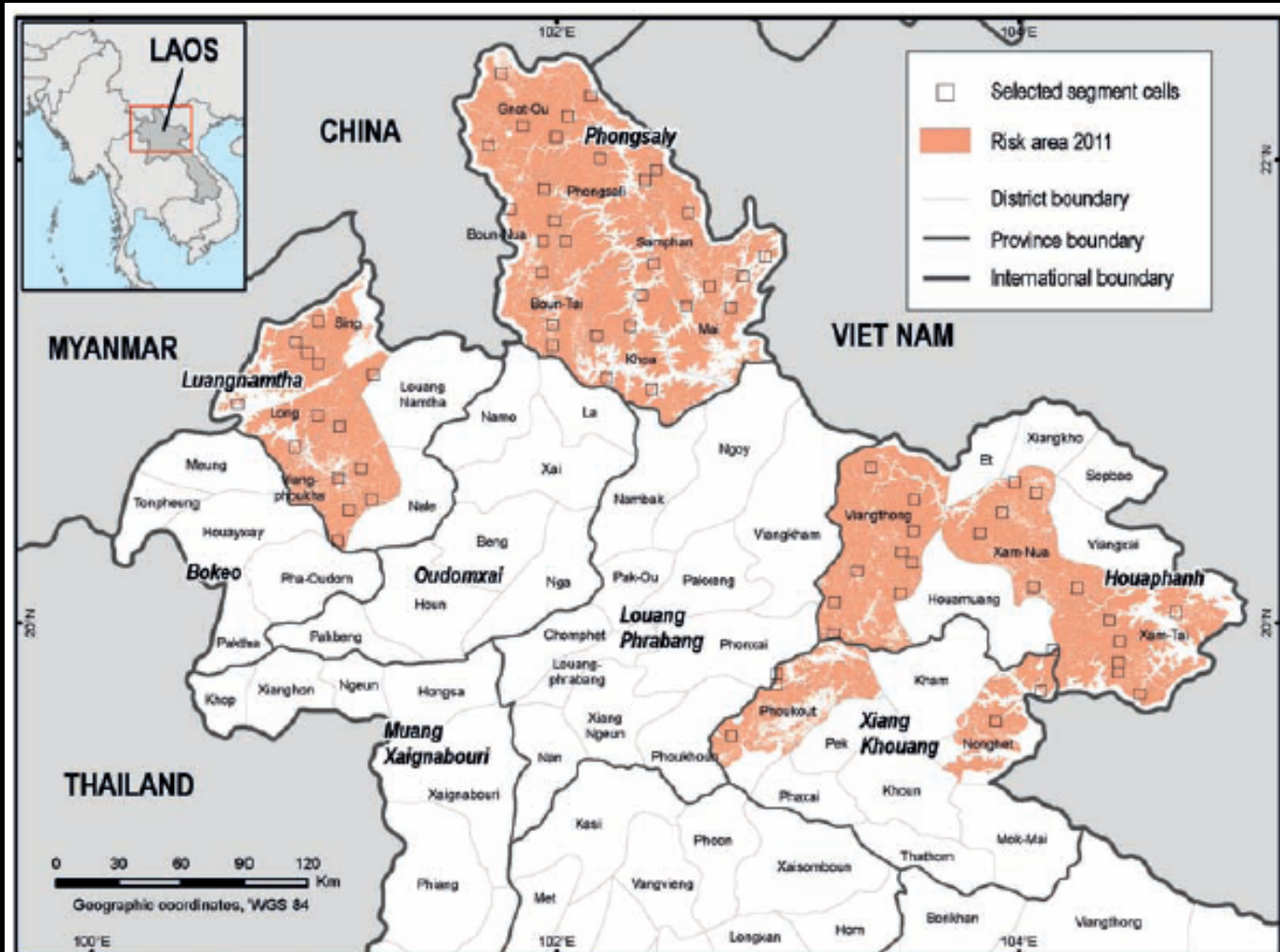
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3. LAO PDR

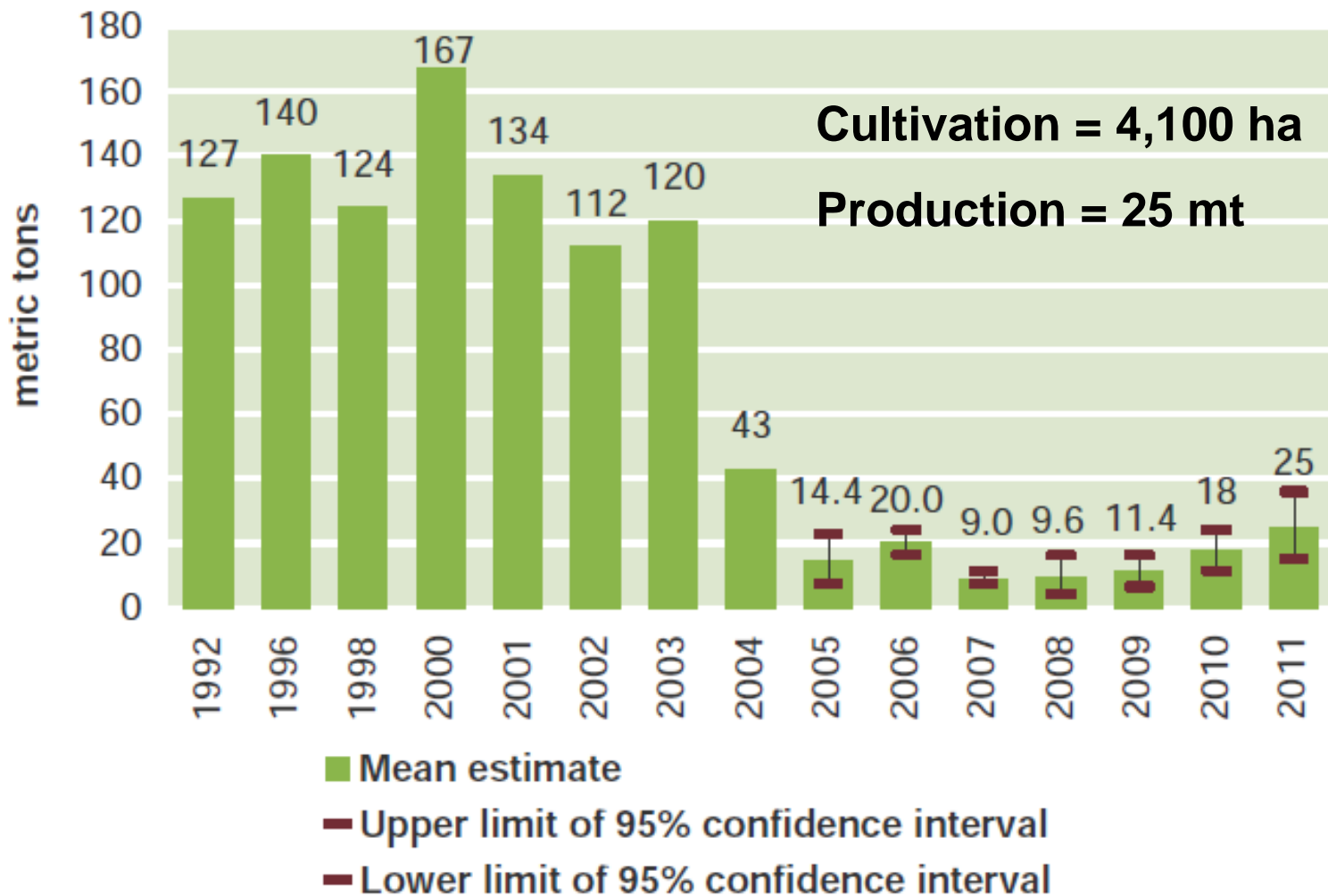
LAO PDR – Cultivation



Source: Government of Lao PDR - National monitoring system supported by UNODC
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LAO PDR – Cultivation

Potential opium production (metric tons), 1992 - 2011





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4. MYANMAR

Satellite Survey

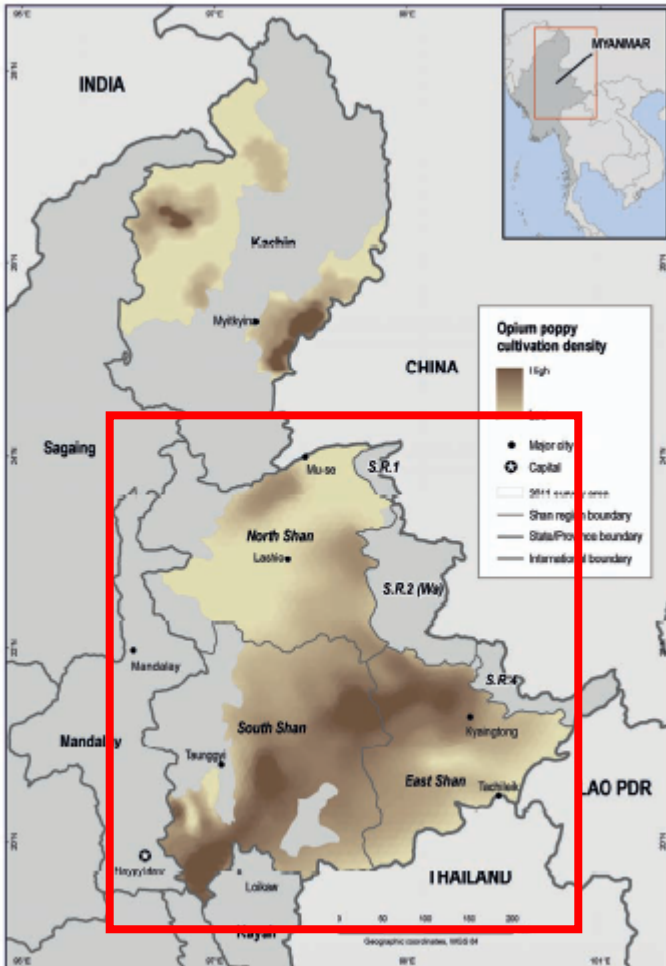
- **Detailed satellite images**
- **Statistical sampling approach**
- **Systematic field verification of all satellite images**
- **Socio-economic survey of villages**

Cultivation = 43,600 ha

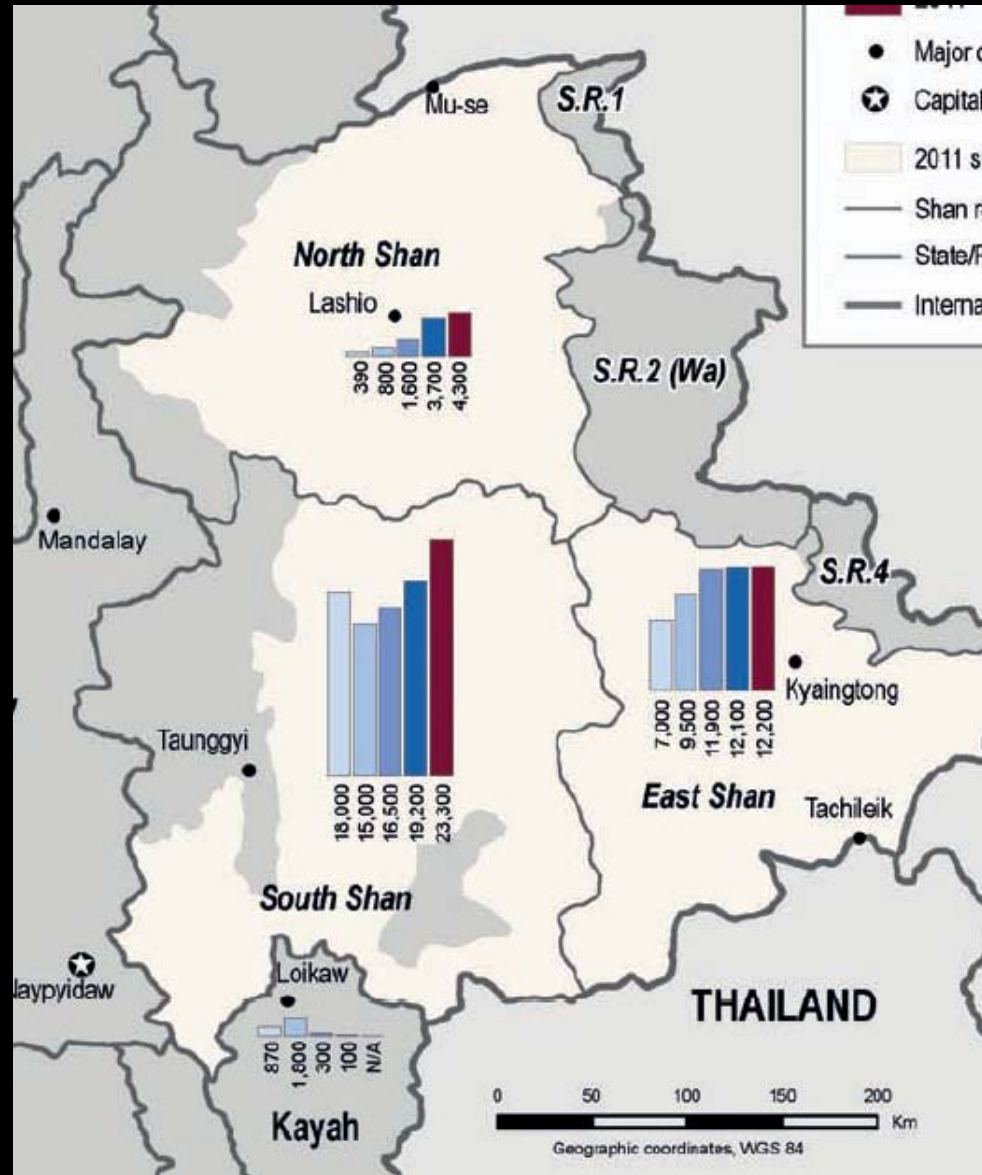
Production = 610 mt

Cultivation

Cultivation density map, Kachin and Shan States, Myanmar 2010



Source: Government of Myanmar - 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.





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5.

CONCLUSIONS

Conclusions

- 1. What is driving opium poppy increase:**
 - a) Food insecurity**
 - b) Poverty**
 - c) Conflict**
 - d) High prices**
- 2. Few international organizations are currently engaging in Shan State in AD**
- 3. Investment in AD by the international community is an investment in peace and security in the border areas of Myanmar**

THANK YOU

www.unodc.org/eastasiaandpacific