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Southwest Asia Opium Production: 1984 Update

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A Research Paper

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Southwest Asia Opium Production: 1984 Update

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A Research Paper

This paper was prepared by analysts in the Strategic Narcotics Branch, Office of Global Issues, with contributions from the Analytic Support Group. Comments and queries are welcome and may be directed to the Chief, Strategic Narcotics Branch, OGI,

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**Southwest Asia
Opium Production:
1984 Update** [redacted]

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Summary

*Information available
as of 26 October 1984
was used in this report.*

We estimate 1984 opium production from Southwest Asia—Pakistan, Afghanistan, and Iran—to be between 500 and 800 metric tons, enough for the region to maintain its position as the leading supplier of heroin for the US market. [redacted]

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[redacted] we believe Pakistan will produce approximately 46 tons of opium, about as much as last year, and Afghanistan should produce about 160 tons. [redacted] our Afghan estimate is below the most recent Drug Enforcement Administration calculations. Our estimate of Iranian production, [redacted]

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[redacted] is between 400 and 600 tons. [redacted] 25X1 25X1

Serious political, economic, and security demands on the governments of Southwest Asia prevent implementation of the stringent narcotics control measures that would cut opium production enough to significantly affect heroin supplies. Dozens of heroin laboratories have been established over the last three years along the Pakistan/Afghanistan border and, in recent years, Pakistani traffickers have taken greater control of trafficking routes partially replacing the Italians, Turks, and Iranians who had been the largest manufacturers and traffickers of Southwest Asian heroin. [redacted]

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In 1985 production from the area probably will increase, and heroin exports could rise sharply—perhaps by 50 percent. Much of the increase would result from the recent expansion in cultivation in Pakistan plus a return to normal yields. Yields fell this year because of bad weather. If this increase in supplies materializes, much of it will be aimed at the US market. The US market may become saturated because of a large increase in Mexican opium supplies this year. With exportable production from both Mexico and Southwest Asia increasing, heroin prices may decline slightly and purities will rise. [redacted]

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**Southwest Asia
Opium Production:
1984 Update** [Redacted]

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Introduction

Southwest Asia—Pakistan, Afghanistan, and Iran—has been an important supplier of heroin to the United States since 1979, and opium produced in the region currently accounts for about half of the heroin imported into the United States. Most of the opium is grown illicitly in tribal areas where the governments are unable to enforce prohibitions against cultivation. Pakistan has attempted to reduce cultivation in those areas where the government has control, but there is little chance that either the Iranian Government or the Soviet-backed regime in Afghanistan will attempt to reduce production. Without controls, production from the region will increase and the United States may become an even more important target for Southwest Asian heroin traffickers. [Redacted]

**Table 1
Pakistan: Opium Crop, 1984^a**

Agency	Poppy Hectarage (hectares)	Opium Yield (kilograms per hectare)	Opium Production (metric tons)
Total	3,300	14 (average)	46
Dir	810	18	15
Gadoon/Amazai	820	13	11
Malakand	130	12	2
Bajaur	430	12	5
Mohmand	230	12	3
Others	840	12	10

^a Estimated. Data for crop year for the fall of 1983 to spring of 1984.

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[Redacted]

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Pakistan: Production Stable

We estimate Pakistan's 1984 opium crop at about 46 tons, approximately the same as last year's crop (table 1). [Redacted]

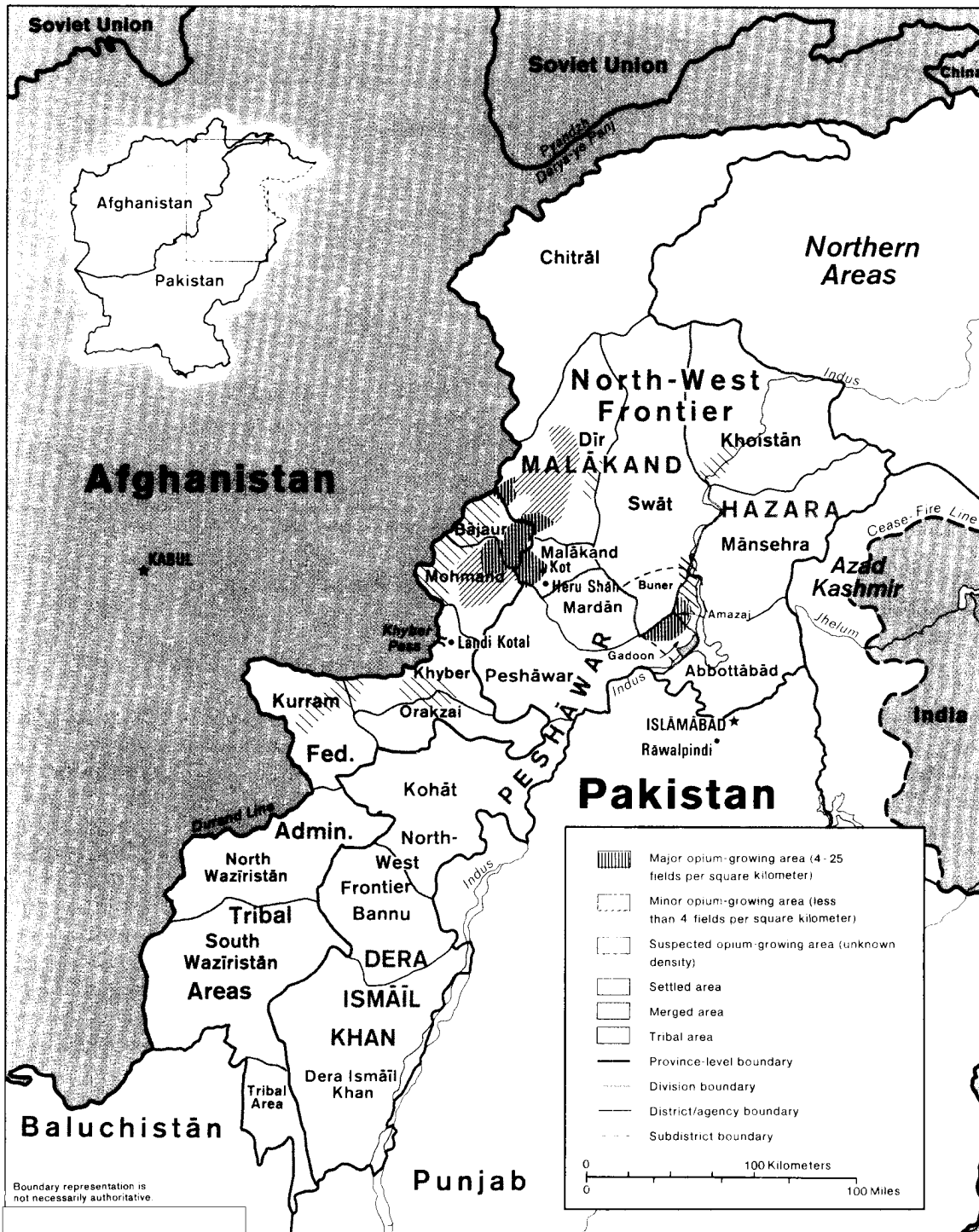
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Figure 2
Opium-Growing Areas in Northwestern Pakistan, 1984



Boundary representation is not necessarily authoritative.

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Cultivation Patterns

Poppies in Pakistan are grown largely on nonirrigated fields, making the crop highly sensitive to extreme weather. Ideally, the crop is planted in October and November when moisture from the July to September rains causes germination. Rainfall is needed in January and February for the crop to mature properly. If the rains are delayed, as in 1984, the crop may fail to mature or die. During the end of the growth cycle in March or April, the poppies need warm dry weather. Heavy rains in the spring can cause mildew and diseases that spoil the crop or, during harvesting, wash away the opium that is collecting on incised poppy bulbs. [redacted]

The 1984 poppy crop covered an estimated 3,300 hectares, a 20-percent increase in harvested area over 1983 and a strong indication that growers intended to increase opium production beyond the levels of the past few years. We are confident that opium cultivation expanded substantially this year [redacted]

[redacted] The most dramatic increase appears to have occurred in tribal areas along the Afghan border where government authority is confined to main roadways. Although these areas traditionally produce only about one-fourth of Pakistan's opium, [redacted] cultivation in Mohmand, Bajaur, and Khyber Tribal agencies almost doubled—from 400 to nearly 800 hectares. A US Department of State consultant estimates that the poppy hectareage in the tribal areas may have increased by over 70 percent. [redacted]

Cultivation also increased in some parts of Malakand, a major growing region of the North-West Frontier Province where the government is attempting to implement a number of development projects to move farmers away from opium cultivation. [redacted] production in Dir increased by at least 20 percent in 1984. [redacted]

The increased area under cultivation offset what we believe was a significant decline in opium yields. Meteorological data indicate that weather conditions in the growing areas significantly reduced yields in

1984—perhaps by 40 percent [redacted] Many fields, especially those at lower elevations, either failed or produced a poor crop. [redacted] 25X1

We do not have reliable information on the specific effects of the poor weather on yields. Embassy sources reported that yields averaged only about 14 kilograms per hectare (kg/ha) countrywide versus average countrywide yields of 22 kg/ha during good years. Some growers confessed to harvesting 20 kg/ha in areas where water was plentiful. [redacted] 25X1

Controlling Cultivation

Government attempts to control poppy cultivation have clearly had mixed results in Pakistan. [redacted] the elimination of poppies in Buner, once a major producing region where the United Nations has been sponsoring a development project for several years, and a reduction in Gadoon, the location of a US-funded development project. [redacted] 25X1

[redacted] nearly all arable land was planted in poppies, and villagers reported that cultivation may be more extensive than the year before. [redacted] the reported decline in Buner and Gadoon is being offset by increased cultivation in a new area to the north. [redacted] 25X1

Fear of government enforcement has generally deterred cultivation by some tribesmen in areas where the government has extended its influence. For example, although cultivation increased elsewhere in Malakand, no opium was grown in the Heru Shah area where authorities eradicated 40 hectares of poppies the year before. A better test will be whether farmers in Kot—where 175 acres were destroyed in a bloody eradication operation last fall—abstain from growing [redacted] 25X1

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Figure 3. Pakistan: Drought Damaged Poppyfields in Gadoon
 This photo gives an indication of the extent of poppy cultivation in Gadoon and the effects of the January and February drought on the 1984 crop. It was taken in April when the poppies normally should be in full flower and almost ready to harvest. Instead, the photo reveals a village surrounded by poppyfields containing stunted, nonproductive plants.

poppies this year. Enforcement, however, has clearly contributed to a shift in cultivation to remote areas where the government has neither the influence nor the means to control opium production and where security concerns take precedence over narcotics control. [redacted]

An anticipated rise in opium prices may also be responsible for increased plantings. As harvesttime approached in April, growers were telling Embassy officials that opium was selling for \$75 a kilogram, the highest price in five years. This may reflect the asking price rather than the actual selling price. But State Department sources report opium brokers, anticipating stronger antinarcotics measures and concerned with maintaining operations at heroin refining

centers, may have bid prices up to increase cultivation and ensure adequate supplies. [redacted]

Production Trends

We believe that 1984 opium production in Pakistan is not likely to fall below the 40-to-60-ton range that we estimated for the last two years. We also believe the 1985 crop is likely to show an increase because of the expanded area under cultivation. This expansion in cultivated area, despite government eradication efforts, suggests that opium production is now in the hands of growers who will not abandon cultivation unless forced. Further reduction in plantings will require government coercion at the risk of widespread

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Table 2
Afghanistan: Opium Poppy Cultivation, 1984^a

	Total Poppyfields Estimated (number)	Cultivated Area ^a (hectares)	Opium Production ^{a, b} (metric tons)
Total^c	49,000	3,979	140 to 180
Northeast Provinces	47,965	3,788	114
Kabul	692	17	1
Kapisa	2,717	66	2
Konarha	4,062	245	7
Laghman	4,696	175	5
Lowgar	3,300	432	13
Nangarhar	32,498	2,853	86
Helmand Valley	1,040	191	6
Helmand	745	125	4
Oruzgan	295	66	2
Other	NA	NA	20 to 60^d

^a Estimated data for crop year fall, 1983–early summer 1984.

^b Yields of 30 kilograms/hectare.

^c Because of rounding, components may not add to totals shown.

[Redacted]

unrest and considerable bloodshed as during the eradication operation at Kot last fall. Such a move is likely to cause additional confrontations with tribesmen that could destabilize the North-West Frontier Province. [Redacted]

Several other factors are now raising production in Pakistan and bringing back farmers who had abandoned the trade:

- Opium stocks in the North-West Frontier Province, which were plentiful following the record harvests in 1978 and 1979, probably have been depleted.
- Demand for Pakistani opiates remains strong. Domestic abuse continues to grow, and one [Redacted] believes the number of Pakistani heroin addicts could more than triple to 300,000 by 1985. Trafficking patterns suggest that Pakistani heroin is likely to account for a bigger share of the international market.

- Vigorous enforcement, while eliminating production in government-controlled areas, is causing cultivation to expand in areas without it.

- The reduction in opium stocks and vigorous enforcement are likely to cause prices to rise, attracting both new and former growers into the market. [Redacted]

Afghan Production Uncertain

We estimate Afghanistan's 1984 opium crop to be between 140 and 180 tons (table 2). This is well below the 1984 Drug Enforcement Administration (DEA) estimates, which range from 200 to 300 tons; the DEA estimate is based on limited field reporting.

[Redacted]

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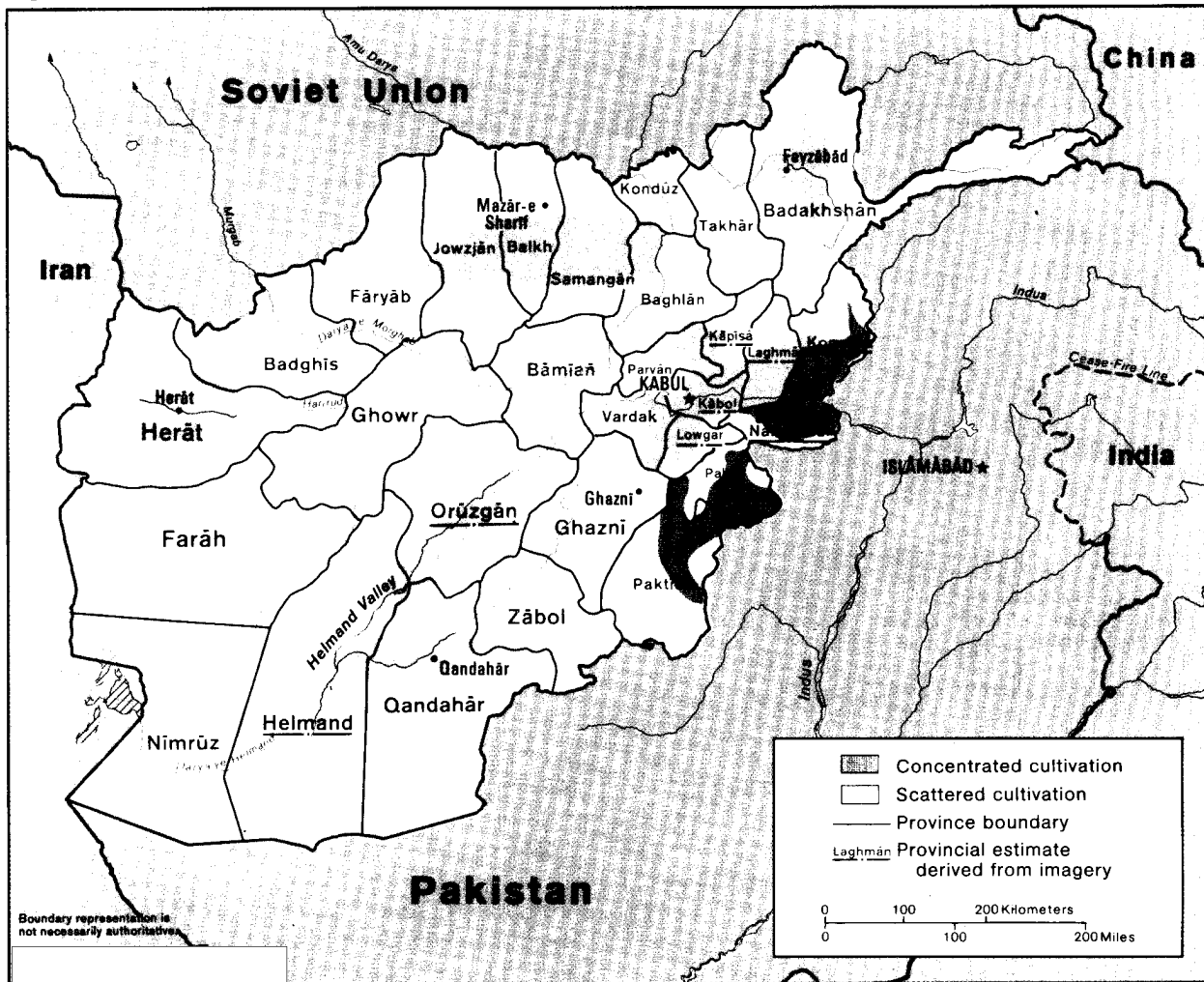
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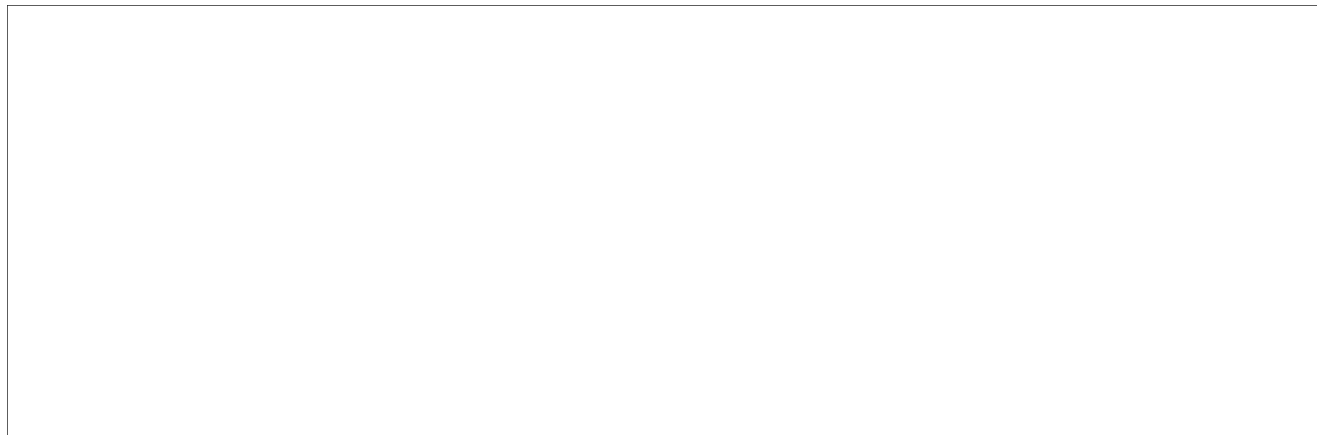
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Figure 4
Opium-Growing Areas in Afghanistan, 1984

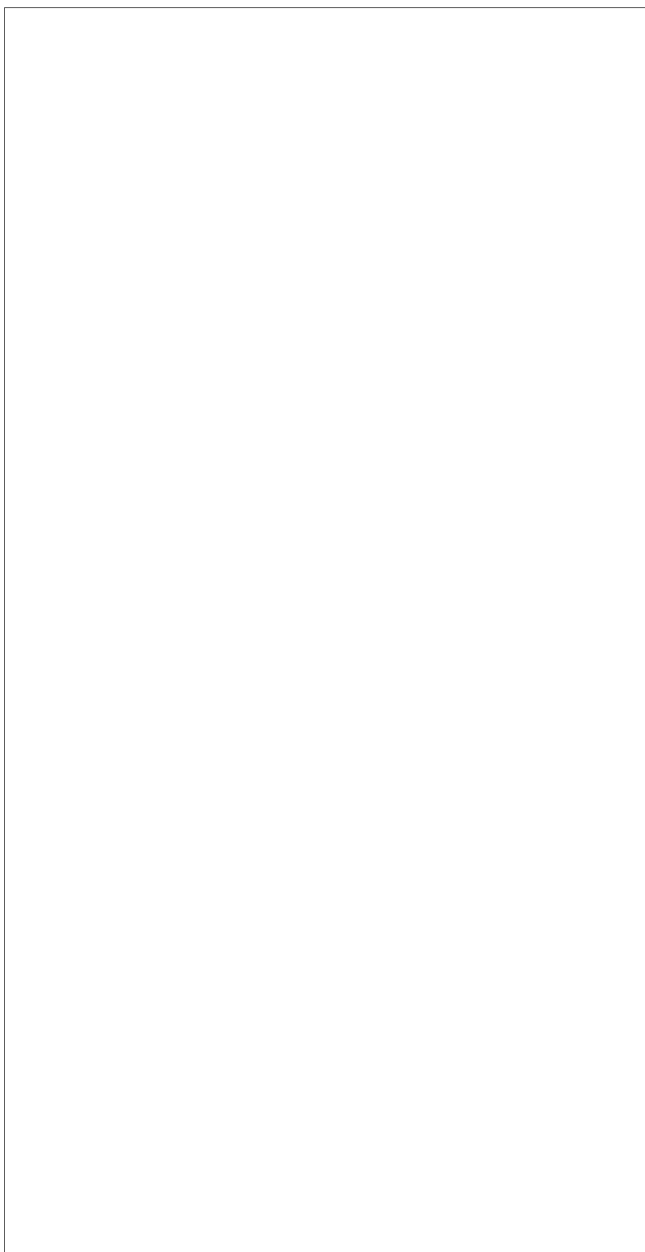


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percent in other northeastern provinces and 10 percent in the Helmand Valley. Countrywide, about two-thirds of all fields identified as poppy were located in Nangarhar. [redacted]

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Poppy cultivation in the other northeastern provinces and the Helmand River Valley was less extensive and not nearly as concentrated as in Nangarhar. In Kapisa, Konarha, and Laghman Provinces much of the land is mountainous with some terraced areas, smaller average field sizes, and lower poppy densities. Poppy cultivation in the Helmand Valley is all on irrigated land, and opium yields can be expected to be high. [redacted]

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The major uncertainty in our estimate is the extent of cultivation in other areas of Afghanistan. Paktia and Paktika Provinces [redacted]

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[redacted] are reportedly major producers. [redacted] poppy fields in these provinces are planted in the spring and harvested in the fall, a contrast with cultivation patterns in most of the country [redacted]

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[redacted] Badakhshan, in the extreme northeast of the country, is also reported to have extensive poppy cultivation. [redacted]

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Opium cultivation in Afghanistan could easily increase next year because there are no apparent barriers to expansion. The limited government enforcement efforts in effect before 1979 are no longer imposed. The Soviets, though increasingly worried about drug abuse among enlisted troops, seem to be preoccupied with the insurgency [redacted]

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[redacted] fighting is not significantly disrupting opium cultivation. [redacted]

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Cultivation Patterns

Nangarhar Province is the source of most of the Afghan opium entering Pakistan, and the province's dominant role as an opium producer [redacted]

[redacted] Approximately 30 to 40 percent of the cultivated fields were sown to poppy in some areas of the province compared with 5

Estimated Yields

Opium yields are one of the major unknowns in Afghanistan. Previous studies conducted in the early 1970s by the UN Food and Agriculture Organization

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and the US Agency for International Development reported yields ranging from a low of 20 kg/ha under rainfed conditions to over 50 kg/ha on irrigated well-fertilized lands where average yields are about 30 kg/ha. DEA uses a yield ranging between 25 and 50 kg/ha. Drought during this year's growing season probably cut yields significantly in the rainfed fields, but, because about 90 percent of the opium poppy in Afghanistan is grown on irrigated land largely unaffected by rainfall variations, we believe average yields of about 30 kg/ha were probably obtained in 1984.

[Redacted]

Production Trends

We expect to see a gradual increase in the level of opium production in Afghanistan over the next few years. Unless the Afghan Government begins an eradication campaign, there are no barriers to such an increase other than the general disruption caused by the Soviet occupation and the insurgency. A number of incentives could cause production to increase:

- Opium is the most valuable cash crop available to Afghan farmers. It is also easily stored and transported and is imperishable, an important consideration during wartime.
- Demand for opium within Afghanistan is increasing. It is used to bribe Soviet soldiers at checkpoints and border crossings, and the Soviet troop demand for drugs—albeit still low—is growing rapidly. There is also some evidence of increased Afghan drug abuse.
- Pakistan's trafficking networks, now moving larger amounts of heroin to Europe and the United States, need to be resupplied.
- [Redacted] more heroin laboratories and refineries are being located in Afghanistan, and they are likely to stimulate opium cultivation.

[Redacted]

The Iran Situation

[Redacted]

[Redacted]

No current or reliable data exist on levels of production and consumption of opium in Iran. The Islamic Government takes a harsh view toward narcotics production and trafficking and indeed took some successful actions early on to curtail domestic cultivation and drug consumption. We believe that both have rebounded, primarily because of the government's preoccupation with other problems. Most estimates of annual production are in the range of 400 to 600 tons, making Iran the largest producer in Southwest Asia and the second largest in the world after Burma.

[Redacted] the number of opium and heroin addicts has also increased rapidly—to an estimated 1 million—and we believe Iran is probably a net importer of opiates. [Redacted]

Marketing Southwest Asian Opium

Southwest Asian opium suppliers should have no trouble meeting regional and international narcotics demands. Most of Southwest Asia's opium is consumed within the region by opium smokers and a growing number of heroin addicts. Less than 15 percent of the crop—perhaps no more than 100 tons—is used to produce heroin; yet this is more than enough to supply approximately half of the US and nearly all of the European market. [Redacted]

In recent years, Pakistanis have taken greater control of this trade partially replacing the Italians, Turks, and Iranians who had been the largest manufacturers and traffickers of Southwest Asian heroin. Despite piecemeal enforcement by the Government of Pakistan, dozens of heroin laboratories have been established over the last three years in the tribal areas in

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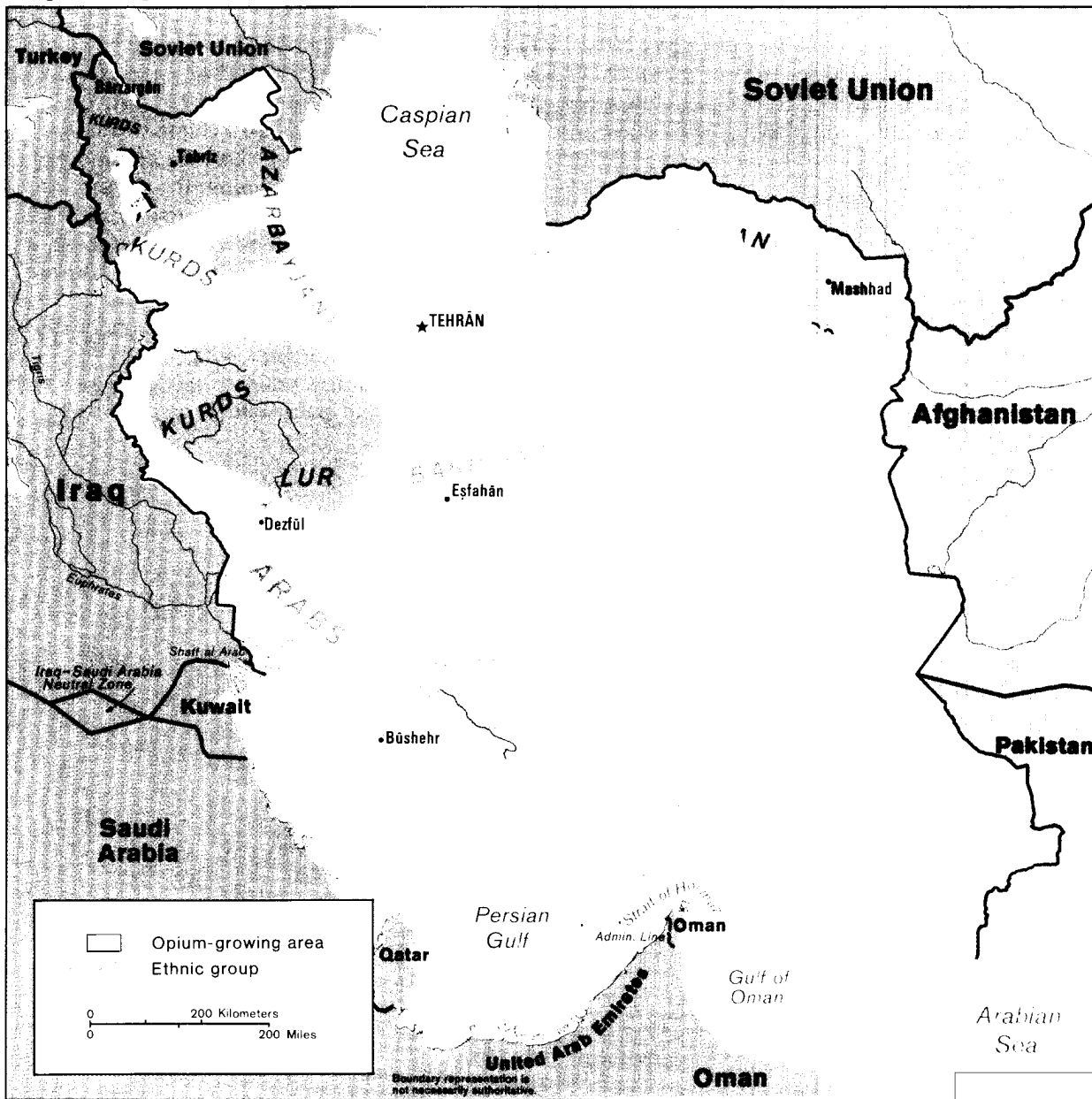
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Figure 6
Suspected Opium-Growing Areas in Iran, 1984



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and around Landi Kotal, an ancient smuggling city in the Khyber Pass, and across the border in Afghanistan. High-quality heroin is usually sent from these laboratories to traffickers in Pakistan's major cities who arrange to have it smuggled into Europe and the

United States. Although they often use direct smuggling routes, increased surveillance at ports of entry and the search for new markets are causing the Pakistanis to exploit new routes, especially through Africa and India.

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The western flank of Southwest Asia, though not as influential as it once was, remains active in the international heroin trade. Narcotics from Iran still flow into eastern Turkey where they are either converted into heroin and smuggled to Europe, shipped to processing centers in Italy or, increasingly, smuggled into Syria for processing into heroin in laboratories around Aleppo. [REDACTED]

Outlook

Southwest Asian opium producers are likely to sustain a level of output that keeps the region a leading source of heroin for the US and European markets. Serious political, economic, and security demands on the governments of Southwest Asia prevent the stringent narcotics control measures that would cut opium production enough to significantly affect heroin supplies:

- Even if the Government of Pakistan eliminates opium production in all the areas it has targeted this year—a highly unlikely event—production would be cut by only 25 tons. This amount could be made up easily from elsewhere in the region, possibly even from increased production in the autonomous tribal areas.
- In Afghanistan, Soviet and Afghan forces will not be able to gain control of the countryside where opium is produced unless they substantially escalate their war against the insurgents. Any major operation, especially in the eastern growing areas, almost certainly would be aimed more at cutting supplies to the insurgents than at eradicating opium production.
- Iranian authorities view narcotics abuse as a serious social problem, but more immediate economic and security issues take precedence over narcotics suppression. For now, Tehran is likely to emphasize stopping drug smuggling from Pakistan more than ending domestic poppy cultivation in the Kurdish-dominated northwest. [REDACTED]

Given the constraints on controlling opium production, we see little likelihood of any reduction in the supplies available to Western markets over the next year or so. The only limiting factor might be more weather damage. Indeed, if weather patterns return to normal, heroin exports from Southwest Asia could rise sharply by late 1985. The increase would tend to come mostly from Pakistan where the recent expansion in cultivated area could result in a 60-percent production increase if 1985 has normal weather. If such an increase in production materializes, most of the heroin produced would be aimed at the United States. This increase plus a major expansion in Mexican opium production would seriously threaten US interdiction efforts. Moreover, with supplies from both sources increasing, prices on the US market may decline slightly, and heroin quality will increase.

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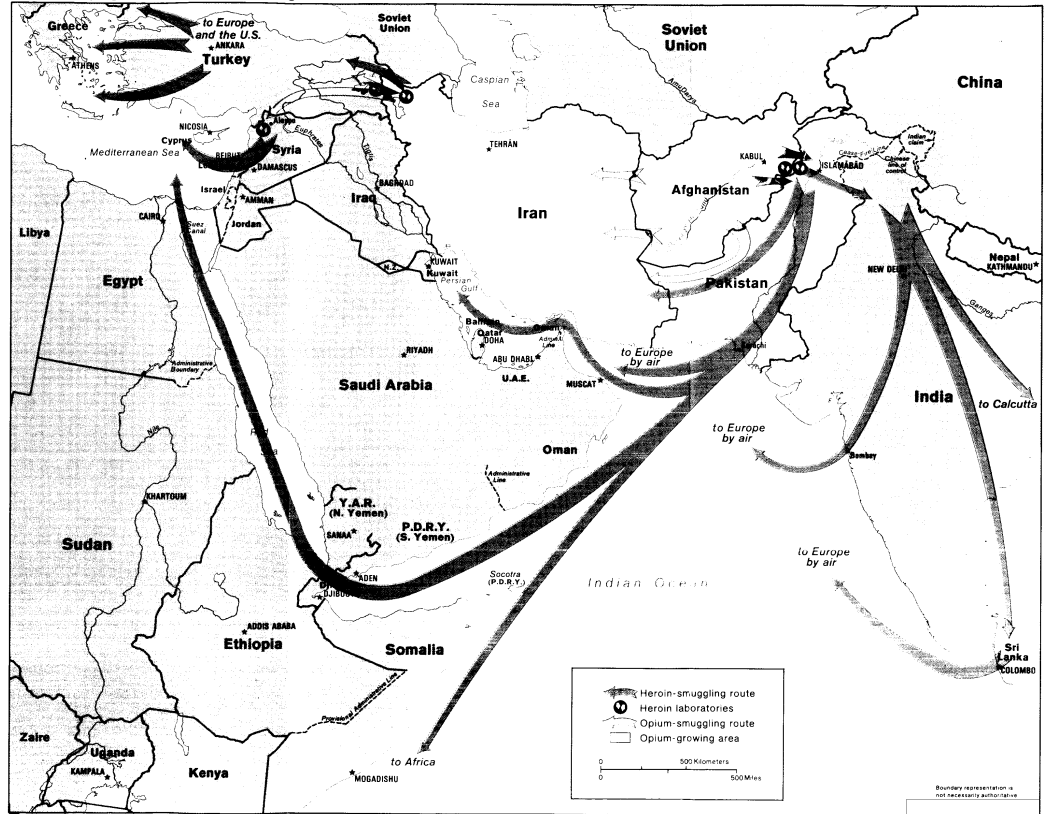
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Figure 7
Major Smuggling Routes and Opium-Growing Areas in the Golden Crescent



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