

## 1.2 Opium / Heroin market

### 1.2.1 Production

*While global cultivation of opium poppy is increasing...*

In 2004, global illicit opium poppy cultivation increased by 16%, due entirely to increased cultivation in Afghanistan. In Southeast Asia, in contrast, opium poppy cultivation has decreased continuously since 1998. In 2004, only 50,900 ha of opium were cultivated in Lao PDR and Myanmar, as compared to 158,000 ha in Lao PDR, Myanmar, Thailand and Viet Nam in 1998. Despite this year's increase, global opium poppy cultivation is still far less than it was in the nineties, and since 1998 - the year of the UNGASS - global cultivation has declined by 18%.

In 2004, 67% of the global opium poppy cultivation took place in Afghanistan. The area under cultivation increased from about 80,000 ha in 2003 to an unprecedented 131,000 ha in 2004. Of greatest concern is the fact that opium poppy cultivation has been introduced into previously unaffected areas and is now found in all 34 provinces of the country.

Over the last six years, the Governments of Lao PDR and Myanmar have achieved a reduction of illicit cultivation in their countries. In Myanmar, rapid reduction is being promoted in line with a national action plan to eradicate the crop by the year 2014. The total area under opium poppy cultivation in Myanmar was reduced 23% to 44,200 ha in 2004. The Government of the Lao PDR has a similar goal of eliminating opium poppy cultivation by the year 2005. The total area under opium poppy cultivation in 2004 was down 43% to 6,600 ha in 2004. Both countries promote alternative livelihood programmes to increase the likelihood that these reductions will be sustainable and the overall goals will be met on target. But many farmers still lack access to these programmes, and assistance from the international community is limited.

After a short boom in 1994, opium poppy cultivation in Colombia has remained relatively stable and was

about 4,000 ha during 2002-2004. The Government reported that 3,000 ha of opium poppy were sprayed and 800 ha manually eradicated in 2004. This is an increase of 71% compared to 2003. The Government of Peru estimated opium poppy cultivation in that country at around 1,500 ha in 2004, about the same as the estimate of 1,400 ha in 2001.

Following declines in the early 1990's, opium cultivation in Pakistan remained below 1,000 ha over the 1996 - 2002 period before increasing strongly in 2003 and 2004. The government has been proactive in implementing eradication, thus keeping cultivation under control. Low levels of opium poppy cultivation exist in many regions and countries such as Viet Nam, Russia, Ukraine, Central Asia, the Caucasus region, Egypt, Peru and Thailand.

*...global opium production is almost stable.*

Global opium production increased by only 2% to 4,850 metric tons in 2004. The increase was minimal due to a relatively low opium yield per hectare in Afghanistan, Lao PDR and Myanmar. Unfavourable weather conditions (insufficient rain and cold temperatures) and disease kept potential opium production in Afghanistan at around 4,200 metric tons (mt), representing an increase of about 17% compared to 2003. In Myanmar, the North Shan experienced a severe drought and the maximum potential yield fell to 8 kg/ha. In Lao PDR the average national opium yield potential for 2004 was even lower, at 6.5 kg/ha. The potential opium production in Lao PDR and Myanmar is around 43 and 370 metric tons respectively. Opium production in Pakistan, Thailand and Viet Nam remained relatively low in 2004. 40 metric tons of opium were produced in Pakistan in 2004. For Latin America opium production is estimated at around 160 metric tons.

The potential farm gate value of opium production in 2004 at the global level is estimated at US\$ 747 million,

less than in 2003 ( 1.2bn). About 80% of this was generated in Afghanistan. Given the strong fall of opium prices in Afghanistan in 2004, the overall farm gate value of opium production was some 41% lower than in 2003 (US\$ 600 million in 2004 against US\$ 1,020 million in 2003).

*Opium prices are inversely proportional to supply trends in Afghanistan.*

Opium prices in Afghanistan were declining with increasing supplies. The average price for fresh opium at the time of harvest, weighted by regional opium production, amounted to US\$ 92 per kilogram in 2004, a 69% decline compared to the previous year. Prices for fresh opium at the farm-gate are, however, still two to three times higher than in the second half of the 1990s.

The opposite trend is observed in Southeast Asia, where farm gate prices of opium have increased in Lao PDR and Myanmar. The average farm gate sale price of opium in 2004 in Myanmar was estimated at US\$ 234/kg, an increase of 80%, in US\$ terms. In Laos, the average farm gate price of opium was estimated at US\$ 218/kg, an increase of 27% over 2003.

Despite increased farm gate prices, it is expected that the decline of cultivation in Southeast Asia will continue as the Government of Lao PDR and the Government of Myanmar remain determined to achieve the goals set in their respective national drug control programmes. The sustainability of these reductions in cultivation will depend on the availability of alternative livelihoods opportunities for local communities. In Afghanistan, the Government has indicated that it will renew its efforts to curb opium poppy cultivation. The first indications of a possible reduction have been reported in the rapid assessment survey conducted by UNODC in the beginning of February 2005.

# OPIUM

**Table 1. GLOBAL ILLICIT CULTIVATION OF OPIUM POPPY AND PRODUCTION OF OPIUM, 1990-2004**

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
<b>CULTIVATION<sup>(a)</sup> IN HECTARES</b>															
<b>SOUTH-WEST ASIA</b>															
Afghanistan	41,300	50,800	49,300	58,300	71,470	53,759	56,824	58,416	63,674	90,583	82,171	7,606	74,100	80,000	131,000
Pakistan	7,488	7,962	9,493	7,329	5,759	5,091	873	874	950	284	260	213	622	2,500	1,500
Subtotal	48,788	58,762	58,793	65,629	77,229	58,850	57,697	59,290	64,624	90,867	82,431	7,819	74,722	82,500	132,500
<b>SOUTH-EAST ASIA</b>															
Lao PDR	30,580	29,625	19,190	26,040	18,520	19,650	21,601	24,082	26,837	22,543	19,052	17,255	14,000	12,000	6,600
Myanmar	150,100	160,000	153,700	165,800	146,600	154,070	163,000	155,150	130,300	89,500	108,700	105,000	81,400	62,200	44,200
Thailand <sup>(b)</sup>	1,782	3,727	3,016	998	478	168	368	352	716	702	890	820	750		
Viet Nam <sup>(b)</sup>	18,000	17,000	12,199	4,268	3,066	1,880	1,743	340	442	442					
Subtotal	200,462	210,352	188,105	197,106	168,664	175,768	186,712	179,924	158,295	113,187	128,642	123,075	96,150	74,200	50,800
<b>LATIN AMERICA</b>															
Colombia <sup>(c)</sup>		1,160	6,578	5,008	15,091	5,226	4,916	6,584	7,350	6,500	6,500	4,300	4,100	4,100	3,950
Mexico <sup>(d)</sup>	5,450	3,765	3,310	3,960	5,795	5,050	5,100	4,000	5,500	3,600	1,900	4,400	2,700	4,800	n.a.
Subtotal	5,450	4,925	9,888	8,968	20,886	10,276	10,016	10,584	12,850	10,100	8,400	8,700	6,800	8,900	8,750 <sup>(g)</sup>
<b>OTHER</b>															
Combined <sup>(e)</sup>	8,054	7,521	2,900	5,704	5,700	5,025	3,190	2,050	2,050	2,050	2,479	2,500	2,500	3,000	3,890
<b>GRAND TOTAL</b>	<b>262,754</b>	<b>281,560</b>	<b>259,686</b>	<b>277,407</b>	<b>272,479</b>	<b>249,919</b>	<b>257,615</b>	<b>251,848</b>	<b>237,819</b>	<b>216,204</b>	<b>221,952</b>	<b>142,094</b>	<b>180,172</b>	<b>168,600</b>	<b>195,940</b>

<b>POTENTIAL PRODUCTION IN METRIC TONS</b>															
<b>OPIUM</b>															
<b>SOUTH-WEST ASIA</b>															
Afghanistan	1,570	1,980	1,970	2,330	3,416	2,335	2,248	2,804	2,693	4,565	3,276	185	3,400	3,600	4,200
Pakistan	150	160	181	161	128	112	24	24	26	9	8	5	5	52	40
Subtotal	1,720	2,140	2,151	2,491	3,544	2,447	2,272	2,828	2,719	4,574	3,284	190	3,405	3,652	4,240
<b>SOUTH-EAST ASIA</b>															
Lao PDR	202	196	127	169	120	128	140	147	124	124	167	134	112	120	43
Myanmar	1,621	1,728	1,660	1,791	1,583	1,664	1,760	1,676	1,303	895	1,087	1,097	828	810	370
Thailand <sup>(b)</sup>	20	23	14	17	3	2	5	4	8	8	6	6	9		
Viet Nam <sup>(b)</sup>	90	85	61	21	15	9	9	2	2	2					
Subtotal	1,933	2,032	1,862	1,998	1,721	1,803	1,914	1,829	1,437	1,029	1,260	1,237	949	930	413
<b>LATIN AMERICA</b>															
Colombia <sup>(c)</sup>		16	90	68	205	71	67	90	100	88	88	80	76	76	73
Mexico	62	41	40	49	60	53	54	46	60	43	21	71	47	84	n.a.
Subtotal	62	57	130	117	265	124	121	136	160	131	109	151	123	160	157 <sup>(g)</sup>
<b>OTHER</b>															
Combined <sup>(e)</sup>	45	45	-	4	90	78	48	30	30	30	38	18	14	24	40
<b>GRAND TOTAL</b>	<b>3,760</b>	<b>4,274</b>	<b>4,143</b>	<b>4,610</b>	<b>5,620</b>	<b>4,452</b>	<b>4,355</b>	<b>4,823</b>	<b>4,346</b>	<b>5,764</b>	<b>4,691</b>	<b>1,596</b>	<b>4,491</b>	<b>4,765</b>	<b>4,850</b>

<b>HEROIN</b>															
<b>Potential HEROIN</b>	<b>376</b>	<b>427</b>	<b>414</b>	<b>461</b>	<b>562</b>	<b>445</b>	<b>436</b>	<b>482</b>	<b>435</b>	<b>576</b>	<b>469</b>	<b>160</b>	<b>449</b>	<b>477</b>	<b>565<sup>(g)</sup></b>

(a) Harvestable after eradication.

(b) Due to small production, cultivation and production were included in the category " Other countries", for Viet Nam as of 2000 and for Thailand as of 2003.

(c) According to the Government of Colombia, cultivation covered 7,350 ha and 6,500 ha and production amounted to 73 mt and 65 mt in 1998 and 1999 respectively.

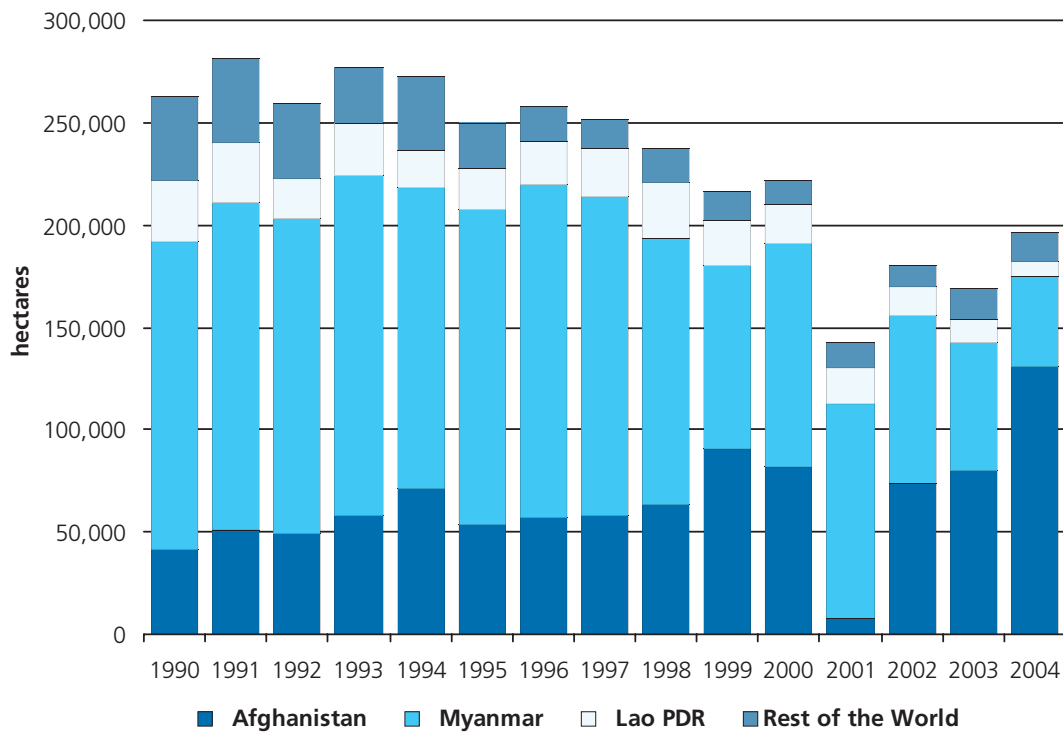
(d) Sources: As its survey system is under development, the Govt of Mexico indicates it can neither provide cultivation estimates nor endorse those published by UNODC which are derived from US Government surveys.

(e) Includes countries such as Russia, Ukraine, Central Asia, Caucasus region, Egypt, Peru, Viet Nam (as of 2000) and Thailand (as of 2003).

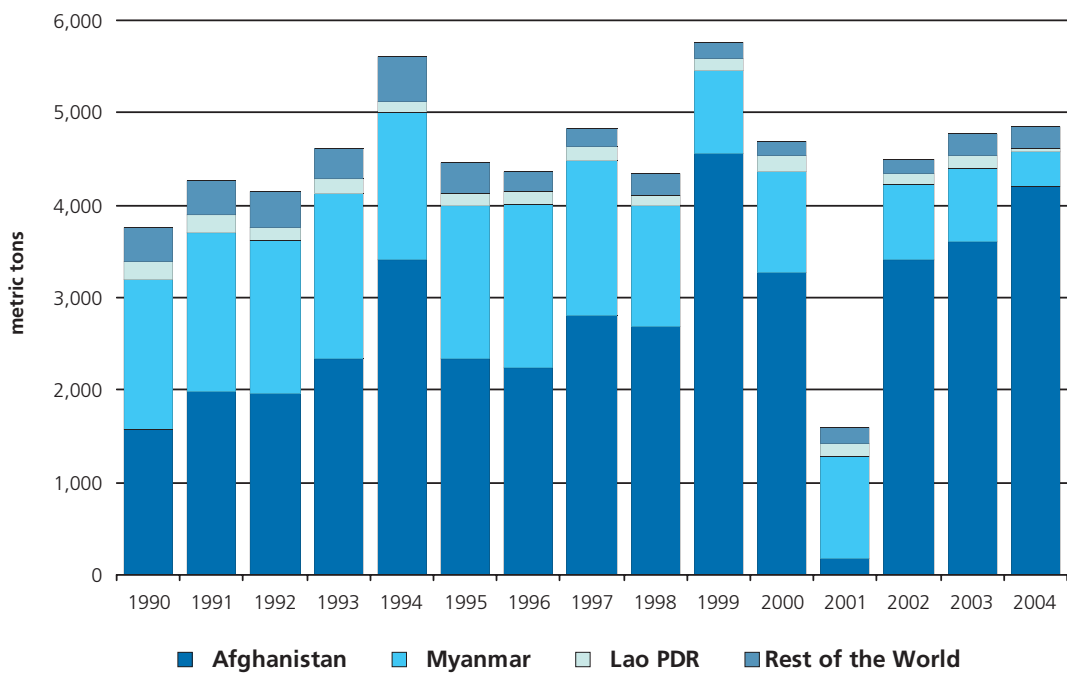
(f) For calculation of regional sub-total for 2004 previous year's estimates were used.

(g) Based on the Afghanistan Opium Survey 2004, estimates of potential heroin production is 500 metric tons (mt) in Afghanistan. For other countries a 10:1 ratio is used for conversion from opium to heroin.

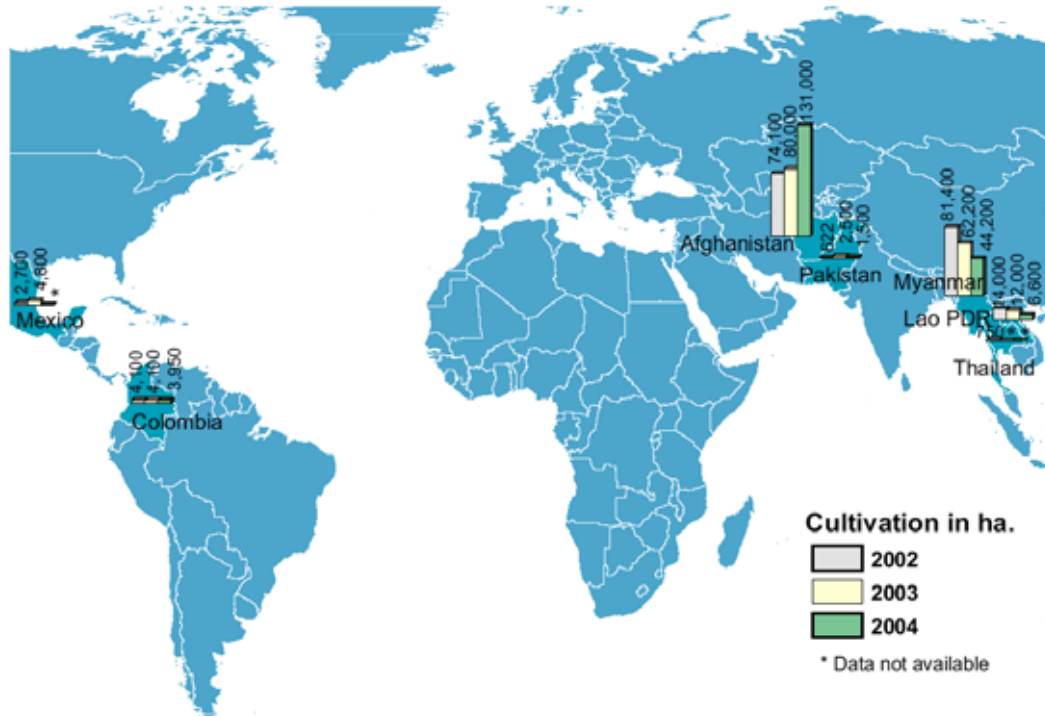
**Fig. 1: Global opium poppy cultivation 1990-2004 (ha)**



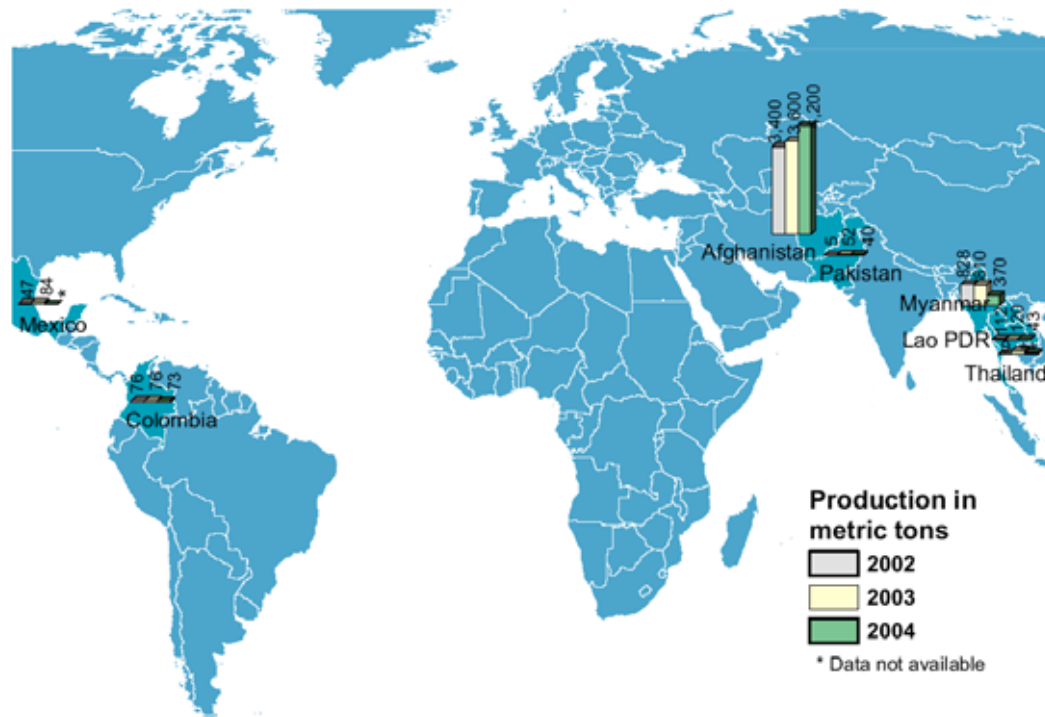
**Fig. 2: Global opium production 1990-2004 (metric tons)**



Map 1. Opium poppy cultivation (2002 - 2004)

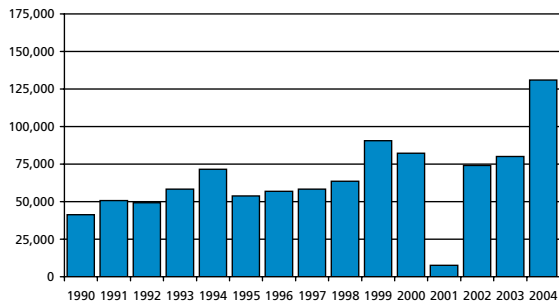


Map 2. Opium production (2002 - 2004)

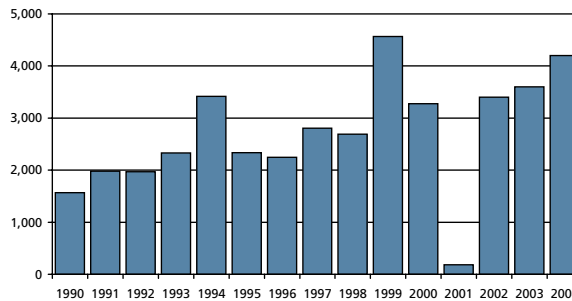


**Fig. 3:**  
Annual opium poppy cultivation and opium production in main producing countries, 1990 - 2004

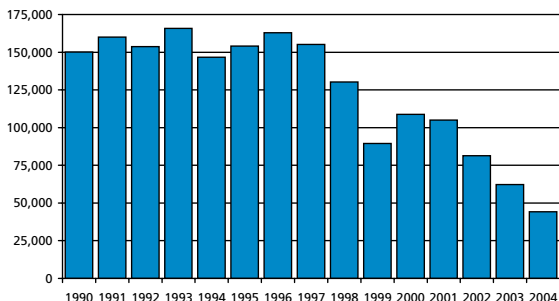
**AFGHANISTAN - OPIUM POPPY CULTIVATION, 1990-2004 (ha)**



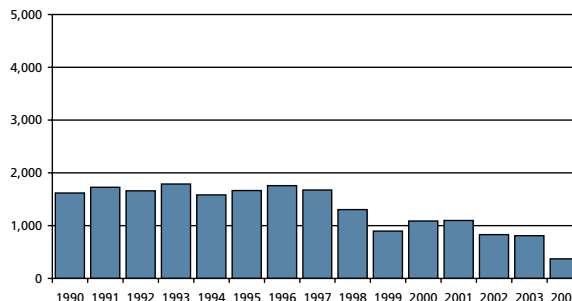
**AFGHANISTAN - OPIUM PRODUCTION, 1990-2004 (metric tons)**



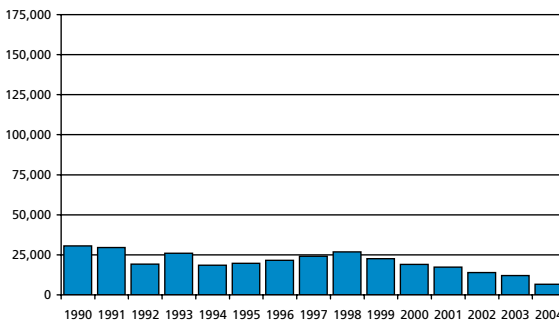
**MYANMAR - OPIUM POPPY CULTIVATION, 1990-2004 (ha)**



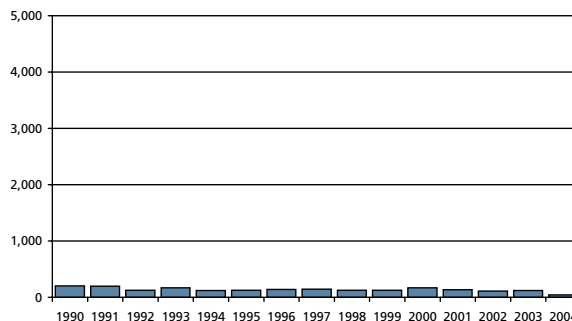
**MYANMAR - OPIUM PRODUCTION, 1990-2004 (metric tons)**



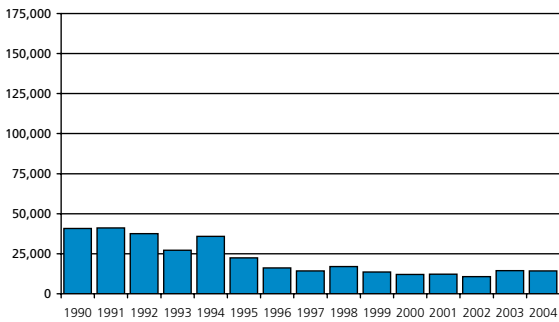
**LAO PDR - OPIUM POPPY CULTIVATION, 1990-2004 (ha)**



**LAO PDR - OPIUM PRODUCTION, 1990-2004 (metric tons)**



**REST OF THE WORLD - OPIUM POPPY CULT., 1990-2004 (ha)**



**REST OF THE WORLD - OPIUM PRODUCTION, 1990-2004 (metric tons)**

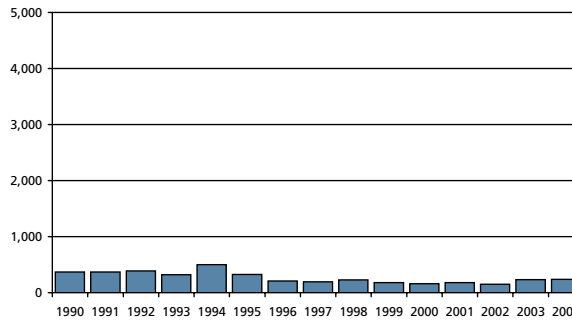
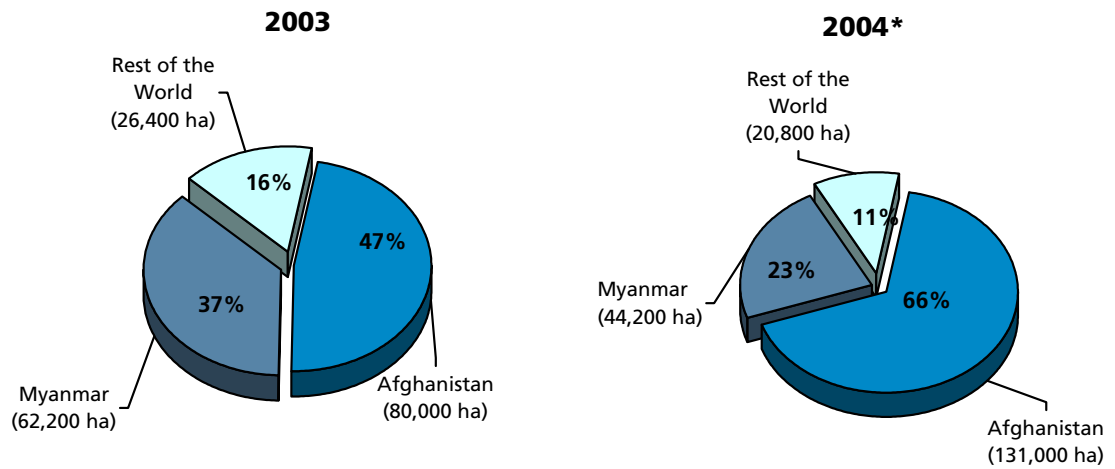
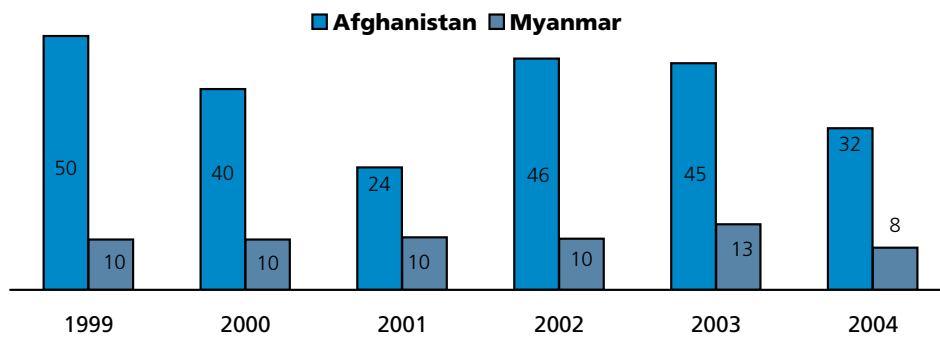


Fig. 4: Opium poppy cultivation



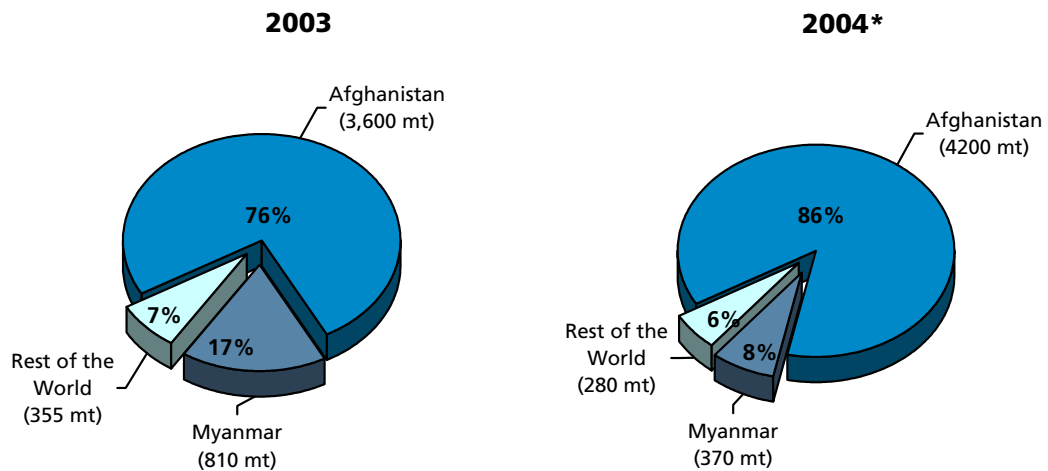
\*Data for the 'rest of the world' is still tentative.

Fig. 5: Opium Yields in Afghanistan and Myanmar (kg/ha)



Differences in opium yield between Afghanistan and Myanmar are due to differences in opium poppy varieties and growing conditions. Variations of yields from year to year in the same country are mostly caused by changes in weather conditions and/or, as in the case of Afghanistan in 2001, by a shift in the relative distribution of cultivation from irrigated to rain-fed land.

Fig. 6: Opium production



\*Data for the 'rest of the world' is still tentative.

Table 2. Estimated farmgate prices for potential opium, 2004

	Farmgate price US\$ per kg	Production metric tons	Potential value (millions of US\$)
Myanmar	234	370	87
Afghanistan	142	4,200	600
Lao, PDR	218	43	9
Colombia <sup>(1)</sup>	194	76	15
Mexico <sup>(1)</sup>	194 <sup>(2)</sup>	84	16
Other <sup>(1) (4)</sup>	196 <sup>(3)</sup>	103	20
<b>Total opium</b>		<b>4,876</b>	<b>747</b>

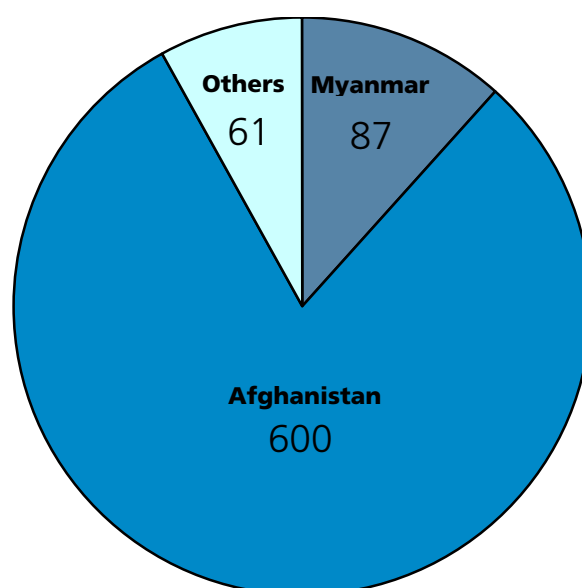
(1) Based on 2002 opium prices and calculated with 2003 production data.

(2) Farmgate price not available: value based on price in Colombia

(3) Average price based on the total value and production from the five countries listed above.

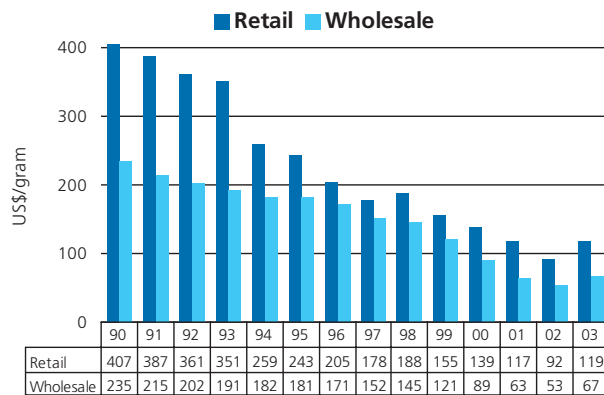
(4) Includes countries such as Pakistan, Central Asia, Russia, Ukraine, Caucasus region, Viet Nam, Thailand, Egypt and Peru.

Fig. 7: Potential farmgate value of opium, 2004 (millions of US\$)

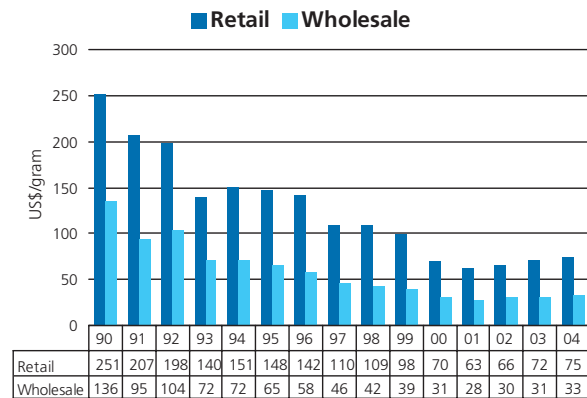




**Fig. 8: USA: heroin retail and wholesale prices, 1990-2003 (US\$/gram)**



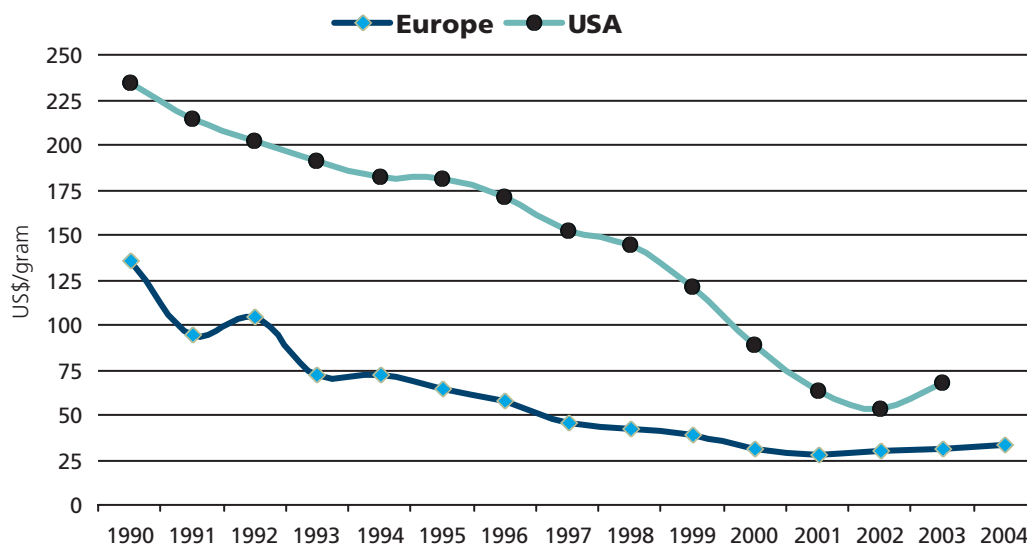
**Fig. 9: Europe: heroin retail and wholesale prices, 1990-2004 (US\$/gram)**



\* preliminary data for 2003.

Note: Retail and wholesale prices are not directly comparable because purity levels differ.

**Fig. 10: Wholesale heroin prices in Europe and the USA, 1990-2004 (US\$/gm, at street purity)**



\* preliminary data for 2003

**Table 3. Reported opium poppy eradication, in ha, 1993 - 2004**

	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Afghanistan							400	121			21,430	
Colombia	9,400	5,314	5,074	7,412	7,333	3,077	8,434	9,279	2,583	3,371	2,994	3865
Lao PDR											4,134	3,556
Mexico	13,015	10,959	15,389	14,671	17,732	17,449	15,461	15,717	15,350	19,157	20,034	
Myanmar	160	1,041	3,310	1,938	3,093	3,172	9,824	1,643	9,317	7,469	638	2,820
Pakistan	856	463		867	654	2,194	1,197	1,704	1,484	n.a.	4,185	5200
Thailand	1,706	1,313	580	886	1,053	716	808	757	832	507	767	
Vietnam		672	477	1,142	340	439		426			n.a.	32.47

### 1.2.2 Trafficking

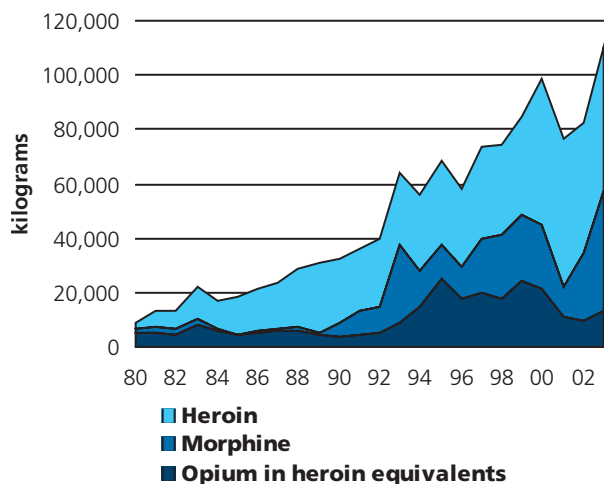
#### *Opiates seizures reached a record high in 2003...*

Global seizures of opiates<sup>7</sup> in 2003 reached 110 mt, a record high and an increase of 33% as compared to a year earlier. The large increase in seizures is thought to reflect higher rates of opiate production and trafficking as well as improved law enforcement activities, notably in the countries surrounding Afghanistan. The interception rate, i.e. seizures of opiates expressed as a percentage of global illicit production, increased to 23% in 2003, up from 18% in 2002 and 14% in 1993.

Interestingly, the increase in seizures was more pronounced for morphine and opium than for heroin, reflecting improved enforcement activities in and around the main producer countries. Broken down by substance, opium seizures increased in 2003 by 38% to

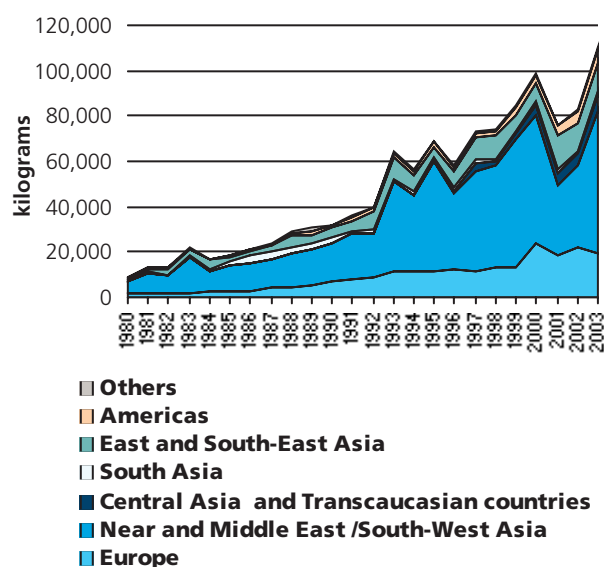
134 mt (or 13.4 mt in heroin equivalents)<sup>8</sup>, morphine seizures increased by 77% to 43.7 mt and heroin seizures increased by 10% to 53.3 mt.

**Fig. 11: Seizures of opiates (in heroin equivalents)<sup>7</sup>, 1980-2003**



Source: UNODC, Annual Reports questionnaire Data/DELTA.

**Fig. 12: Seizures of opiates (in heroin equivalents)<sup>7</sup>, 1980-2003**



Source: UNODC, Annual Reports questionnaire Data/DELTA.

*...with seizures having risen particularly in and around Afghanistan, the world's largest opium producer...*

The countries reporting the largest total opiates seizures<sup>9</sup> for 2003 were Pakistan (34.7 mt) and the Islamic Republic of Iran (26.1 mt) — equivalent to 31% and 24% of global opiate seizures respectively. Encouragingly, the growth of seizures in countries

<sup>7</sup> Opium, morphine and heroin, expressed in heroin equivalents using a 10 : 1 ratio for opium to heroin (i.e. 10 kg opium for the manufacture of 1 kg of heroin) and a 1:1 conversion rate for morphine to heroin.

<sup>8</sup> Using a 10 : 1 ratio for opium to heroin.

<sup>9</sup> In heroin equivalents.

neighbouring Afghanistan was stronger than the growth of Afghanistan's opium production in 2003. Opiates seizures rose in the Near and Middle East/South-West Asia region (which includes Iran, Pakistan and Afghanistan) by 75% in 2003 to 62.9 mt (57% of global opiates seizures). These were the highest opiates seizures ever recorded in this sub-region. Seizures in Central Asia rose by 33% in 2003 to 7.1 mt. Most of the opiates trafficked via Central Asia are destined for the Russian Federation and other CIS countries.

UNODC's 2004 Afghanistan Opium Survey revealed that of Afghanistan's total opiates exports (500 mt of morphine and heroin and close to 1000 mt of opium), about a quarter are being shipped abroad via Central Asia (30% of heroin and morphine exports); the bulk, however, are still exported via Pakistan and Iran to Turkey (directly or via Iraq). The analysis of seizure data in these regions suggests that processing of opium to end products in Afghanistan increased over the last few years, with the trend towards seizing semi-processed (morphine) or end products (heroin) continuing in countries surrounding Afghanistan. UNODC's 2004 Afghanistan Opium Survey showed that 77% of all opiates seizures in the sub-regions surrounding Afghanistan

(South-West and Central Asia) are already in the form of either morphine or heroin, up from 40% in 1995.

*...and temporarily declined in Europe.*

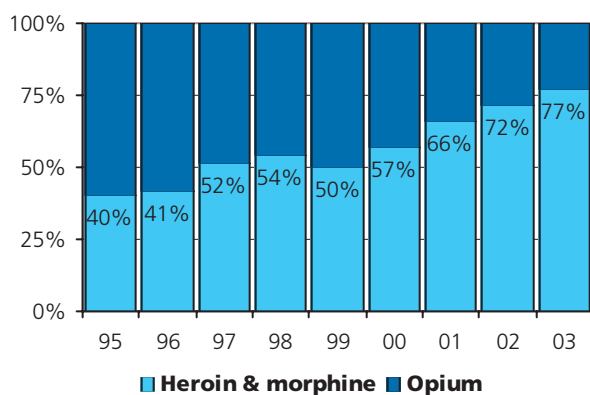
In Europe, in stark contrast to South-West and Central Asia, seizures declined by 13% to 19.4 mt in 2003. Seizures declined both in Western and Central Europe (-11%) and along the Balkan route (-35% as compared to 2002; though up by 12% as compared to 2001). The largest opiate seizures in Western and Central Europe over the last few years have been reported by the UK and Italy, Europe's largest opiate markets.

Heroin prices in Western Europe have continued falling slightly in euro-terms (from €69 per gram in 2001 to €63 in 2002 and €60 in 2003), suggesting that there is no shortage in the availability of heroin. In economic terms, Western and Central Europe continues to be the world's most lucrative heroin market. The continent's overall heroin market (see the market model presented in Chapter 2) is estimated to amount to some 170 mt of which about half is used in Western and Central Europe.

Preliminary data for 2004 suggest that seizures along the Balkan route, through which the bulk of opiates destined for Western Europe continue to be smuggled, increased again. This was primarily the result of successes by the Turkish authorities. In 2003, Turkey's overall opiate seizures<sup>10</sup> amounted to 5.7 mt, representing 5% of global seizures or 30% of all European opiate seizures. In 2004, opiate seizures in Turkey increased by almost 160% to 14.7 mt. Since 1987, Turkey has accounted for Europe's largest opiate seizures.

Criminal groups of Turkish/Kurdish origins continue playing a significant role in wholesale shipments of opiates from Turkey to re-distribution centers across Western Europe.<sup>11</sup> In recent years criminal groups of Albanian origins (based in Kosovo, FYR of Macedonia and Albania) have gained in importance and various other criminal groups from other Balkan countries also participate in this business. Much of the retail trade in Western Europe, however, is now in the hands of criminal groups of West African origin.

**Fig. 13: Proportion of heroin and morphine in opiates seizures in South-West and Central Asia\*, 1995-2003**



\* using a 6.5:1 conversion ratio of opium to heroin and a 1:1 conversion ratio for morphine to heroin.

Source: UNODC, 2004 Afghanistan Opium Survey; UNODC, Annual Reports Questionnaire Data / DELTA

<sup>10</sup> In heroin equivalents.

<sup>11</sup> HONLEA Meeting, Vienna, February 2005.

In East Europe (defined as the CIS countries), opiates seizures continued to rise strongly in 2003 (+78%). According to the Russian authorities, 85% of opiates seized are for domestic use and 15% are intended for onward shipment to other European countries. For the time being not much evidence exists among West European enforcement agencies that opiates trafficked to CIS countries are actually reaching Western Europe; most of these opiates seem to remain within the CIS region for domestic consumption.

*Seizures remained stable - at lower levels - in South-East Asia...*

With opium production in Myanmar and Laos PDR continuing to decline, opiates seizures in South-East Asia (12.4 mt or 11% of global seizures) remained basically stable in 2003 (+4%). In contrast to South-West Asia, opiate seizures in South-East Asia, where heroin is refined close to source, are almost exclusively in the form of heroin. China reported the world's third largest total seizure of opiates (9.6 mt in 2003, or 9% of global seizures) after Pakistan and Iran, ahead of Tajikistan, Turkey and the Russian Federation, and accounted for 77% of all opiates seizures in East and South-East Asia. As almost all of this was heroin (9.5 mt), authorities in China made, for the third year in a row, the world's largest total heroin seizures (18% of the global total), ahead of Pakistan, Tajikistan and Turkey.

*... but increased in the Americas.*

The Americas account for 6% (6.4 mt), of global opiate seizures. In 2003, opiate seizures increased by 20% in the Americas, mainly reflecting increases in Central America (+97%) and in North America (+33%). Seizures in South America, in contrast, declined (-8%). The main heroin trafficking flows within the Americas are from Mexico and Colombia to the USA. The largest opiate seizures in the Americas are made in the USA (2% of global seizures), followed by Mexico and Colombia. The US authorities also name Venezuela and Panama as important transshipment locations.

Map 3. Seizures of opium in Asia in 2003 (only highest ranking countries represented)

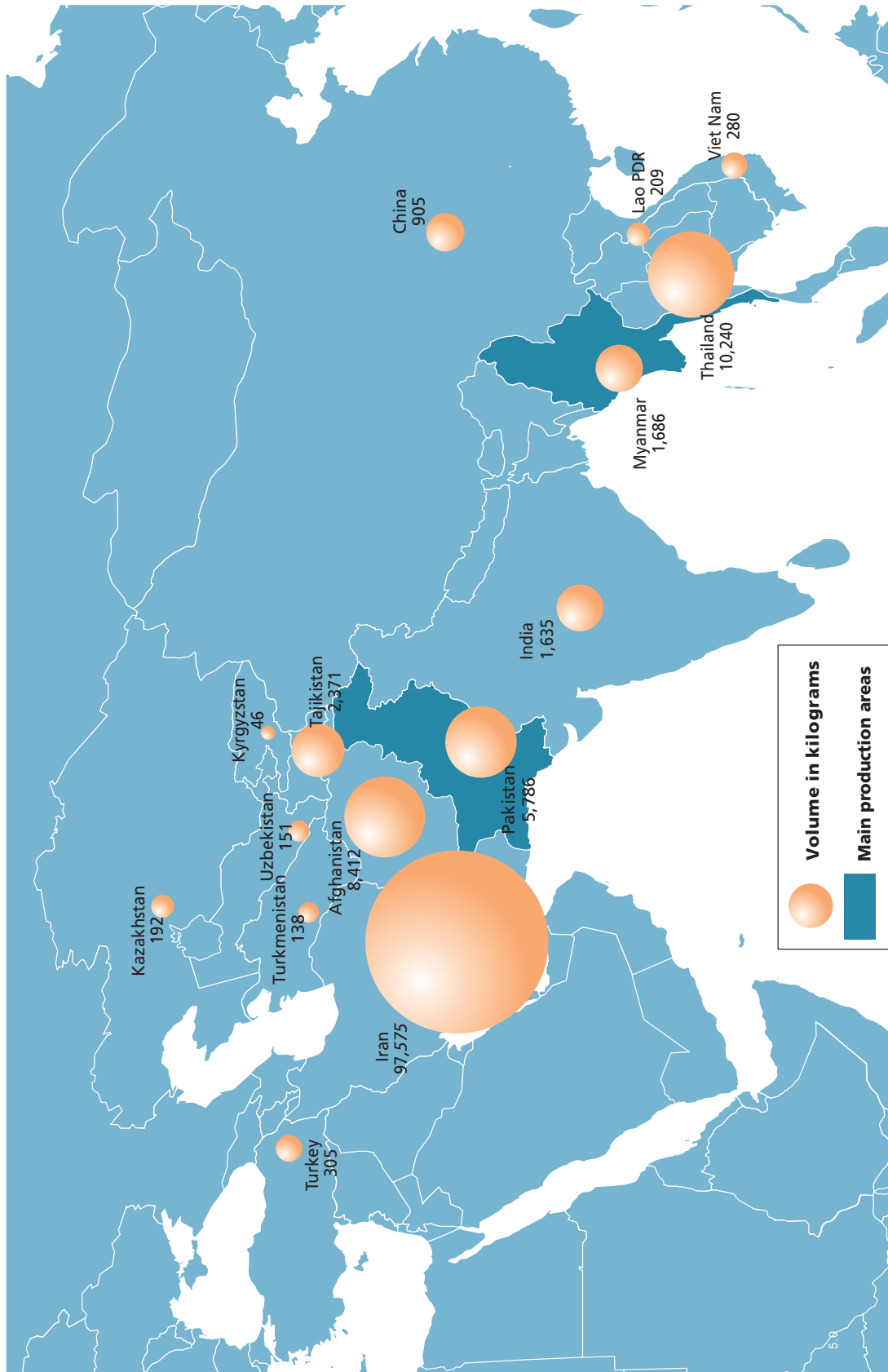


Fig. 14: Global illicit supply of opiates, 1993 - 2003

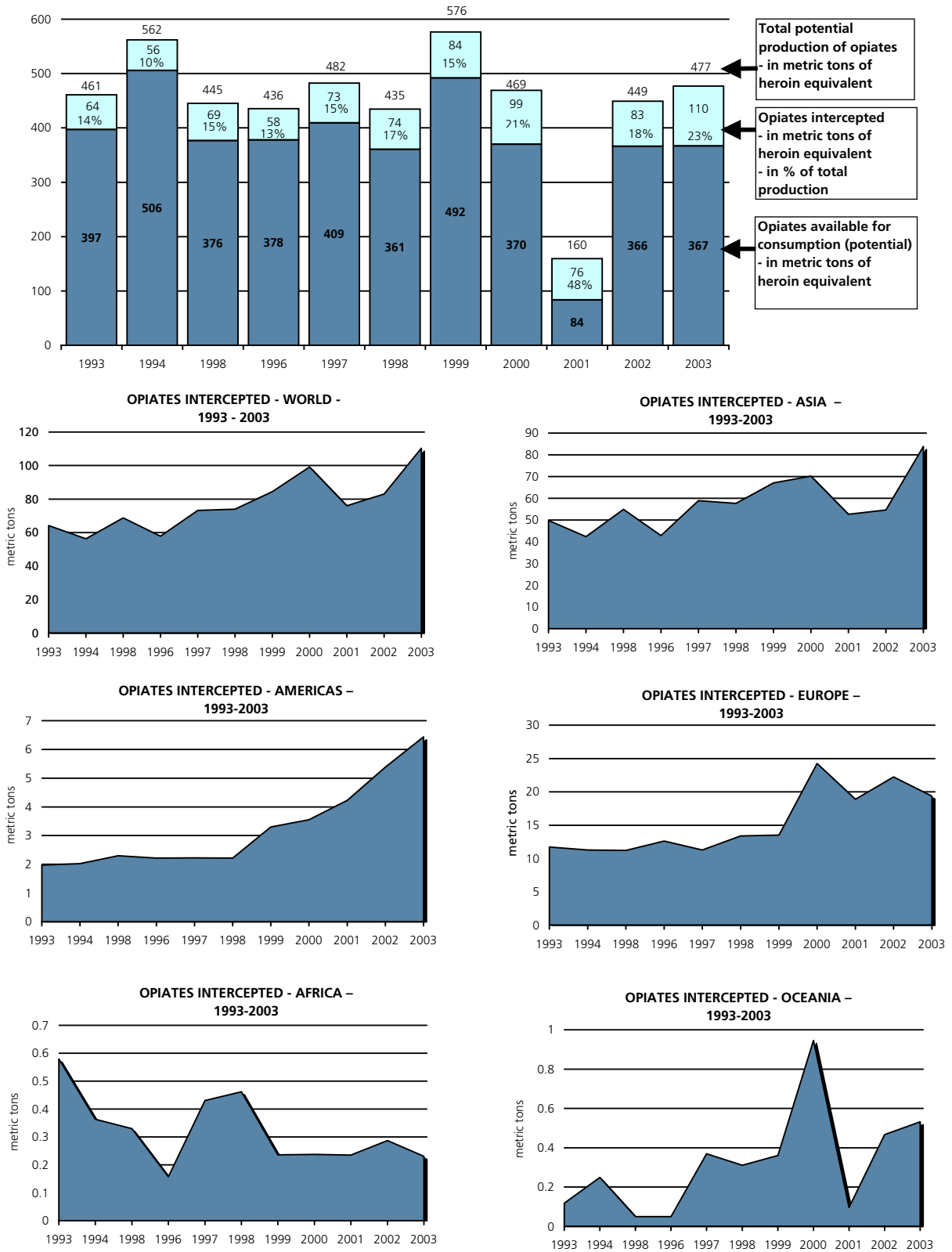
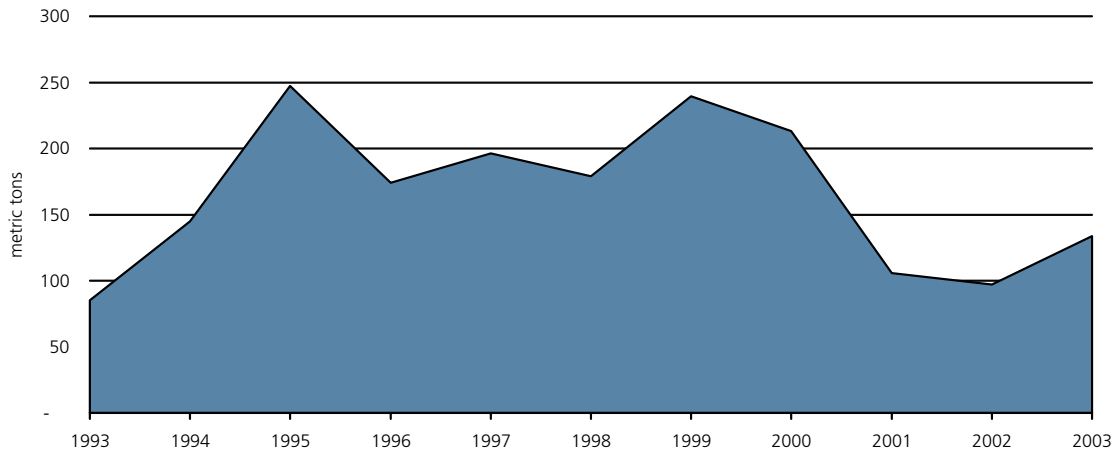


Fig. 15: Global seizures of opium, 1993 - 2003



Year	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
Metric tons	85	145	247	174	196	179	239	213	106	97	134

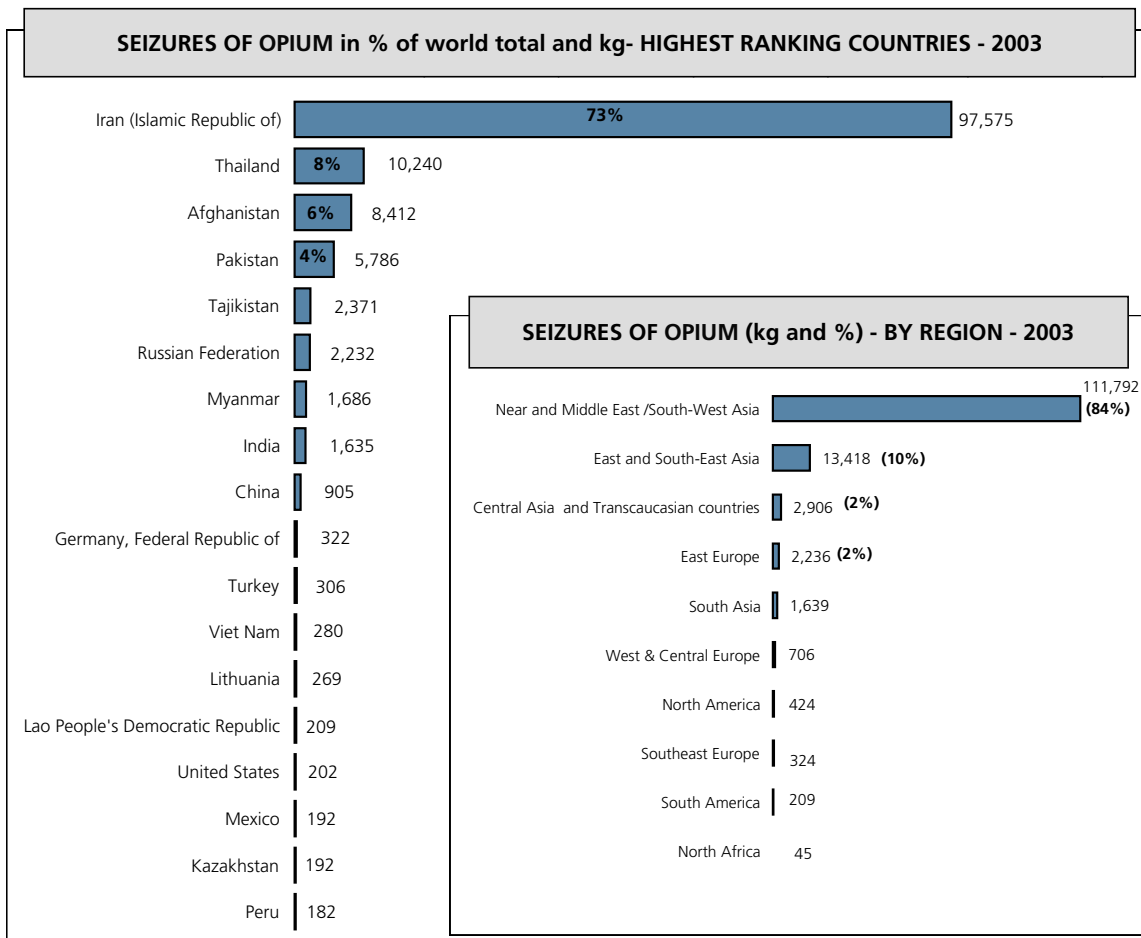
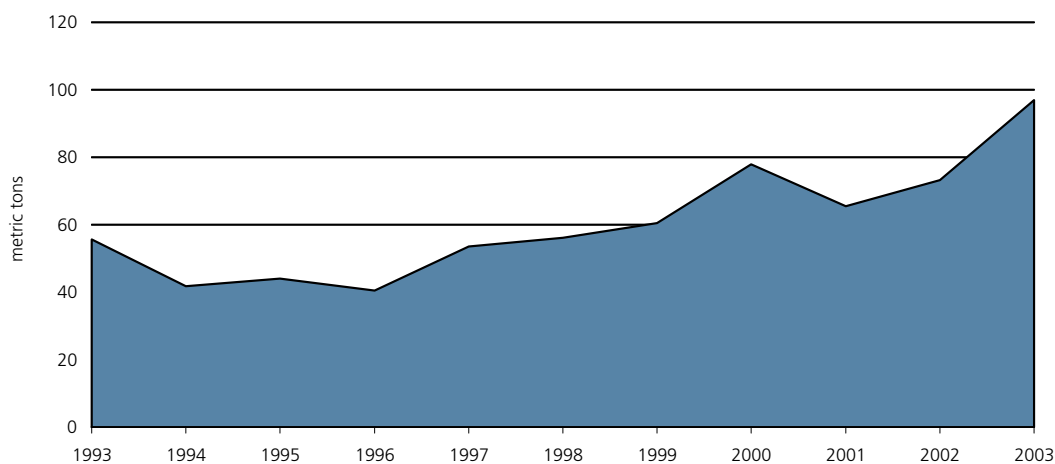
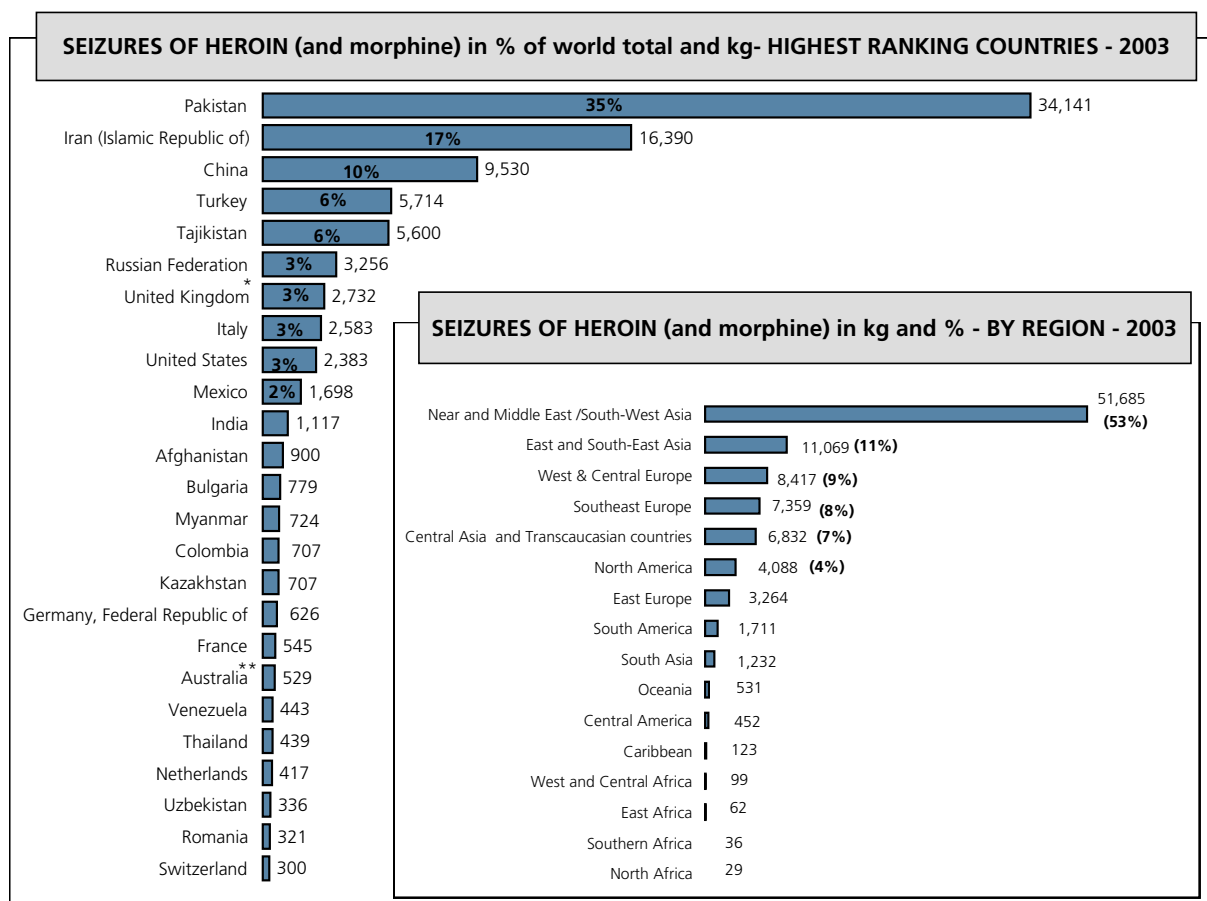


Fig. 16: Global seizures of heroin and morphine, 1993 - 2003



\* metric ton equivalents. 1 kilogram of morphine is assumed to be 1 kilogram of heroin.

Year	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
<b>Metric tons</b>	56	42	44	40	54	56	61	78	65	73	97

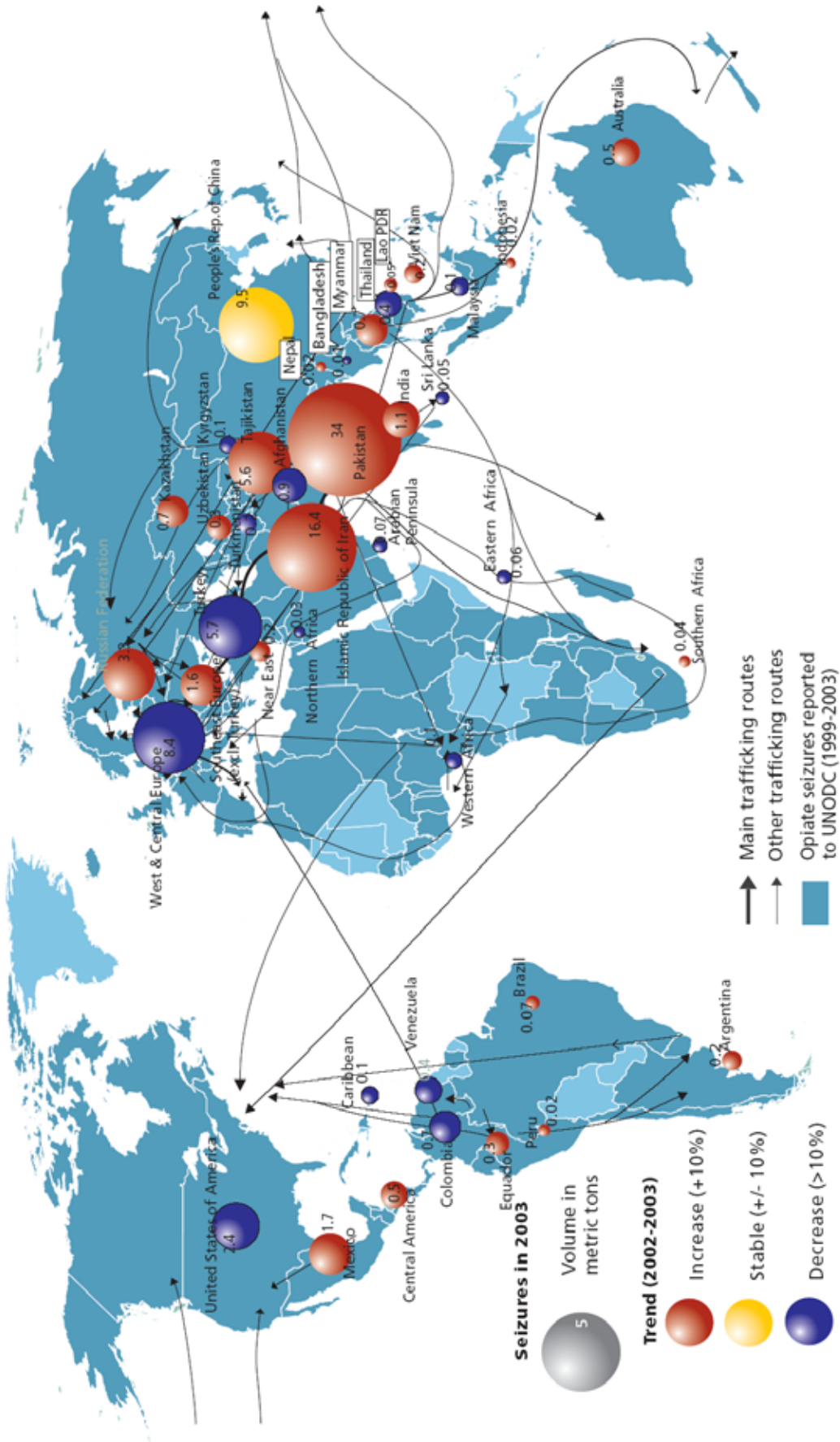


\* data refer to 2002

\*\* total seizures reported by national as well as State & Territory law enforcement agencies which may result in double counting.



Map 4: Heroin and morphine seizures 2002 - 2003 : extent and trends (countries reporting seizures of more than 0.01 mt (10 kg.))



Note: Routes shown are not necessarily documented actual routes, but are rather general indications of the directions of illicit drug flows.

### 1.2.3 Abuse

#### *The extent of opiates abuse remains broadly stable...*

A total of 16 million people worldwide abuse opiates. This is 0.4% of the population age 15-64 and includes some 10.6 million people who abuse heroin (0.3% of the adult population). Opiates, notably heroin, continue to be the main problem drugs in the world. More people (1.3 million) are treated for opiates abuse than for any other substance. Over 60% of drug related treatment demand in Europe and in Asia is related to the abuse of opiates. Out of 1000 opiate (opium, morphine and heroin) users, 78 people worldwide are in treatment for opiate abuse and 2.6 die per year, the highest such ratios for any kind of substance.

More than half of the world's total opiates abusing population is in Asia (8.5 million people) and all indications are that abuse is increasing in this region. In a number of Asian countries, opiates are reported to be the most or secondmost widely consumed drug. The countries with the highest levels of opiate abuse are found in Asia, notably along routes where the drugs are trafficked out of Afghanistan (Iran and Kyrgyzstan).

#### *...with the highest prevalence rate found in Europe...*

The highest regional prevalence rate, however, is found in Europe (0.8%), and the highest levels of opiates abuse can be found in East Europe (notably in the Russian Federation). The number of heroin users in West and Central Europe is estimated at 1.5 million or 0.5% of the population age 15-64. The UK and Italy continue to report high levels of abuse.

Abuse of heroin in the Americas is concentrated in the USA. Heroin abuse continues to be minimal in South America, where abuse of opiates is largely limited to diverted pharmaceutical preparations.

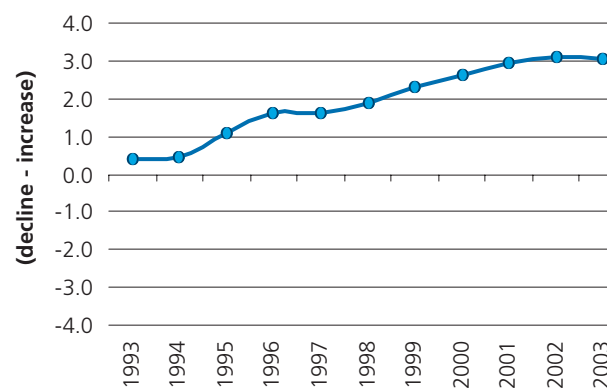
Heroin abuse in the Oceania region, which a few years ago was among the highest in the world, is now near the

average. This reflects primarily the success of Australia in substantially lowering heroin abuse following the heroin shortage in 2001.

#### *...despite some worrying increases linked to the increase in Afghan supply.*

Overall, global trends in opiate abuse were broadly stable in 2003. According to regional experts abuse decreased in several countries of South-East Asia, Australia, and East Europe and was stable in West and Central Europe and in North America. Abuse rose in Central Asia, the Near and Middle East/South-West Asia, South-East Europe, as well as in Eastern and Southern Africa. Almost all of these increases can be linked to the re-emergence of large-scale opium production in Afghanistan.

**Fig. 17: Drug Use Trend Index - Opiates based on expert opinions (weighted by estimated number of opiate users), 1993-2003**



Source: UNODC, Annual Reports questionnaire Data/DELTA.

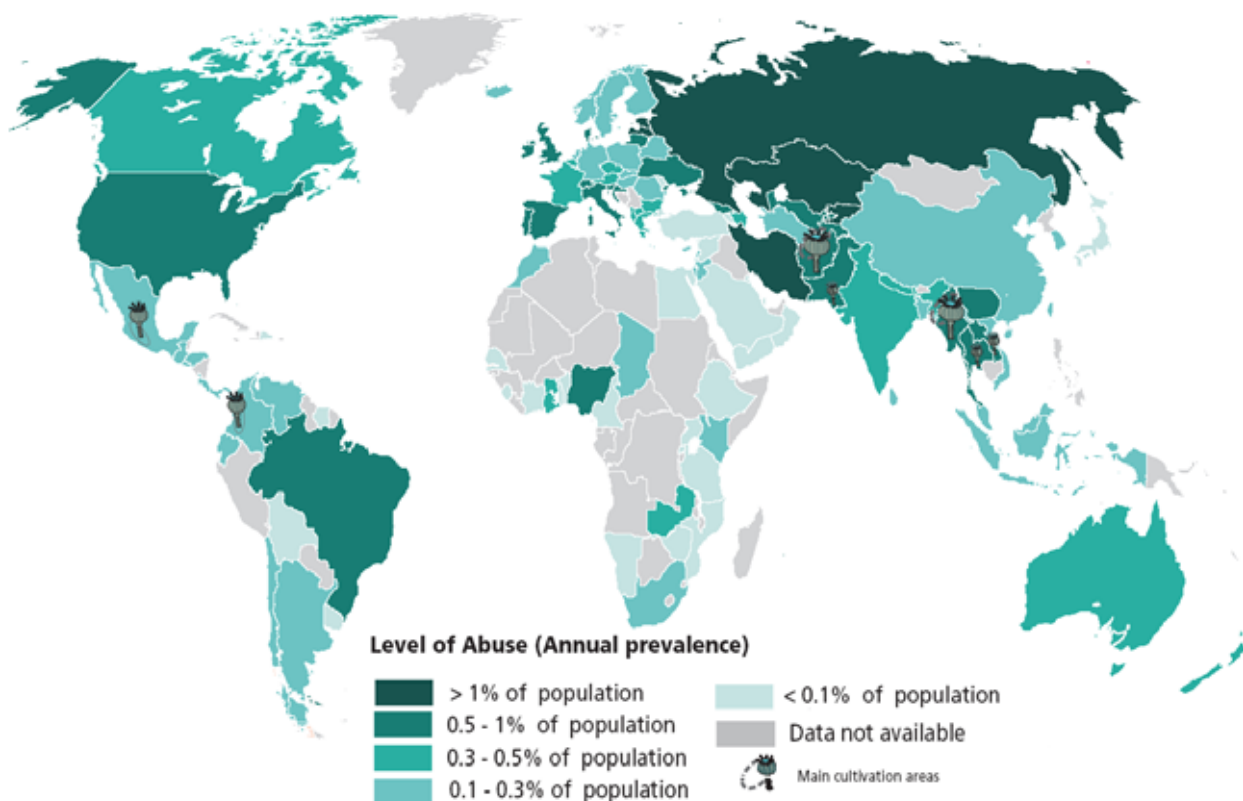
**Table 4. Annual prevalence of opiate abuse, 2002-2004**

	Abuse of opiates		of which abuse of heroin	
	Number of abusers	in % of population age 15-64	Number of abusers	in % of population age 15-64
<b>EUROPE</b>	4,200,000	0.8	2,920,000	0.5
West & Central Europe	1,600,000	0.5	1,500,000	0.5
South-East Europe	180,000	0.2	200,000	0.2
Eastern Europe	2,420,000	1.7	1,200,000	0.8
<b>AMERICAS</b>	2,350,000	0.4	1,560,000	0.3
North America	1,300,000	0.5	1,240,000	0.4
South America	1,050,000	0.4	320,000	0.1
<b>ASIA</b>	8,480,000	0.3	5,290,000	0.2
<b>OCEANIA</b>	90,000	0.4	30,000	0.2
<b>AFRICA</b>	820,000	0.2	810,000	0.2
<b>GLOBAL</b>	<b>15,940,000</b>	<b>0.4</b>	<b>10,610,000</b>	<b>0.3</b>

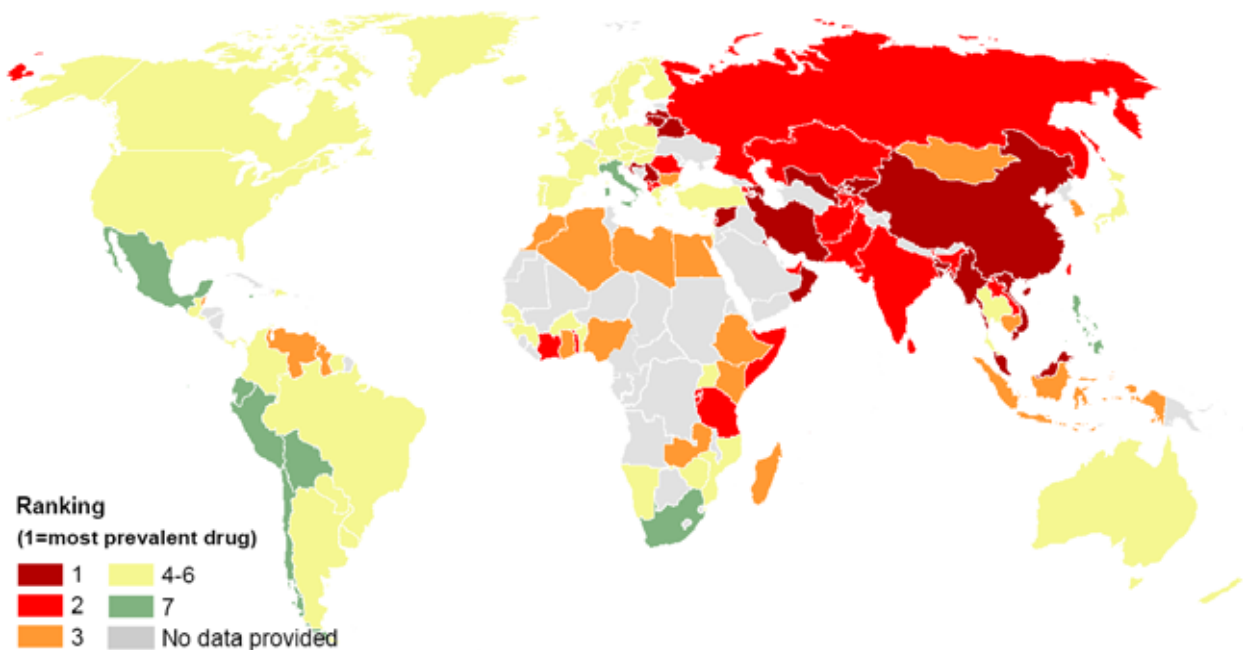
Above global average  
 Around global average  
 Below global average

Sources: UNODC, Annual Reports Questionnaire data, various Govt. reports, reports of regional bodies, UNODC estimates.

Map 5: Abuse of opiates (including heroin) 2002 - 2004 (or latest year available)



Map 6: Ranking of opiates in order of prevalence in 2003



Sources: UNODC Annual Reports Questionnaires data, SAMSHA US National Household Survey on Drug Abuse, Iranian Ministry of Health, Rapid Assessment Study and UNODC ARQ, Council of Europe, ESPAD.

