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Afghanistan's Drug Economy: Assessing the Impact of the Taliban's Opium Ban and Its Regional and Global Implications

Sara Hakimi





A N D I A N A F O U N D A T I O N

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Sara Hakimi is a former diplomat, Research and Evaluation Analyst at the International Republican Institute (IRI), and Advisory Board Member at the Afghanistan Center for Peace and International Studies (ACPIS). Her work has been featured in esteemed publications such as the Women and Public Policy Journal of the Organization for Policy Research and Development Studies (DROPS) and the Hudson Institute. Additionally, she has contributed insightful commentary to renowned outlets including The Washington Post, The Sunday Guardian, Hasht-e Subh, Amu TV, and Afghanistan International TV.

Sara specializes in research and policy analysis, with a particular emphasis on the Middle East and South Asia regions. She also possesses expertise in counter-narcotics, counterterrorism, and extremism initiatives, including a deep understanding of the political and military dynamics involving non-state actors.

Sara holds a master's degree in security studies from Walsh School of Foreign Service (SFS), Georgetown University. Hakimi examines the intricate web of drug production, trafficking, and consumption, seeking to illuminate the multifaceted impact of this phenomenon on Afghanistan as well as its neighboring countries.



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Executive Summary

Afghanistan has long been the world's leading producer of opium, with its narcotics trade deeply embedded in the country's socio-economic, political, and security landscape. The illicit drug economy has perpetuated cycles of poverty, crime, and insecurity, fueling insurgency and organized crime while hindering governance and development. Despite significant international investment in counter-narcotics efforts, Afghanistan's opium trade has remained resilient, evolving alongside political shifts and economic challenges.

This paper examines Afghanistan's opium production and drug trade from historical, regional, and global perspectives, analyzing the impact of past and current policies, particularly the Taliban's recent ban on opium cultivation. Key findings highlight the economic, social, and political ramifications of the ban, as well as its effects on regional and global drug markets.

Key Findings

1. **Dramatic Decline in Opium Cultivation:** Following the Taliban's 2022 decree, opium cultivation decreased by 95%, leading to severe economic consequences for rural communities dependent on poppy farming.
2. **Shifts in Cultivation Patterns:** Northeastern provinces now dominate opium production, reflecting geographic and political adaptations to the ban.
3. **Economic Fallout:** The ban has worsened Afghanistan's economic crisis, disproportionately affecting land-poor farmers while benefitting wealthier landowners with stockpiled reserves.
4. **Regional and Global Drug Trade Dynamics:** Despite reduced opium cultivation, overall drug trafficking continues unabated, with methamphetamine production emerging as a significant concern.
5. **Social and Political Unrest:** The ban risks alienating rural communities and undermining the Taliban's political support base, increasing the potential for unrest.

The recommendations presented in this paper provide a roadmap for mitigating the multifaceted impacts of Afghanistan's drug trade, without unduly affording political recognition to the Taliban regime. These include:

1. **National-Level Measures:** The Taliban must enforce counter-narcotics laws uniformly, dismantle trafficking networks, and provide alternative livelihoods for farmers. Expanding drug treatment programs and raising public awareness are essential to address addiction and reduce societal harm.
2. **Regional Cooperation:** Neighboring countries and regional organizations must enhance collaboration through platforms like the Heart of Asia-Istanbul Process and the Shanghai Cooperation Organization. Strengthening border controls, tracking precursor chemicals, and conducting joint operations can disrupt trafficking networks.
3. **Global Strategies:** Consumer and transit countries must invest in their own nations' demand reduction programs, addiction treatment services, and efforts to restrict the flow of precursors into Afghanistan. International aid should prioritize rural development and market access for Afghanistan's legal agricultural products.

Introduction

Afghanistan has long been synonymous with opium production, consistently serving as the world's leading producer of illicit opium and a major source of heroin for global markets. This prominence stems not only from favorable climatic and geographical conditions but also from decades of political instability, poverty, and inadequate governance. For many rural communities, cultivating opium poppy represents not only an economic lifeline but also a survival strategy in the absence of viable alternatives. Efforts to curtail the opium economy have historically faced substantial challenges. During the Republic era (2001-2021), Afghanistan implemented various counter-narcotics policies, often with international support. Billions of dollars were spent on supply-related programs such as eradication campaigns, rural development initiatives, and interdiction. However, these efforts achieved limited success, often driving resentment among rural populations, creating economic refugees, and inadvertently strengthening insurgent groups such as the Taliban.

The return of the Taliban to power in August 2021 marked a dramatic shift in Afghanistan's governance and its narcotics policy. In April 2022, the Taliban announced a ban on opium cultivation, a move that resulted in a dramatic 95%

reduction in poppy cultivation by 2023.¹ This policy, while effective in reducing production, has had other, far-reaching and mostly negative consequences. Rural farmers who relied on the poppy economy face dire economic straits, while drug traffickers and insurgent groups have adapted by shifting to other narcotics, such as methamphetamine. The ban has also exposed deep economic inequities, with wealthier landowners benefitting from stockpiled reserves while land-poor farmers struggle to survive.

The scope of this paper encompasses the historical and contemporary dimensions of Afghanistan's narcotics trade, with a particular focus on the Taliban's recent policies. It examines the socio-economic, political, and global implications of the opium ban, drawing on data from key stakeholders, satellite imagery, and field research. The objectives are threefold:

1. **To provide a comprehensive analysis of Afghanistan's drug economy** over the past two decades, focusing on the shifts in cultivation, trafficking, and enforcement policies.
2. **To evaluate the impact of the Taliban's 2022 opium ban** on Afghanistan's economy, social fabric, and political stability, as well as its regional and global ripple effects.

- 3. To propose actionable recommendations** for national, regional, and international stakeholders to address the interconnected challenges posed by the narcotics trade.

This paper argues that a balanced approach, combining robust enforcement, sustainable rural development, and coordinated international collaboration, is essential for mitigating the adverse impacts of Afghanistan's drug trade while promoting long-term stability and growth. It seeks to inform policymakers, practitioners, and researchers engaged in counter-narcotics and development efforts in Afghanistan and beyond.

Context and Background

Afghanistan's Opium Cultivation and Drug Trade Pre-2021

Over the past two decades, opium poppy cultivation has remained a central component of Afghanistan's economic and political landscape, deeply woven into the country's socio-economic fabric and consequently its power dynamics. During the twenty years following the Taliban's removal from power in 2001, Afghanistan

experienced a dramatic increase in poppy cultivation and opiate production, establishing itself as the world's leading producer of heroin. Often, the individuals and groups involved in the drug economy span opposing sides of the conflict, indicating a complex web of connections and overlapping interests. For example, throughout this period corrupt police units have imposed taxes on the drug economy, while local commanders and powerbrokers have owned or sponsored poppy fields, rented land to farmers, and provided loans for cultivation.

During the twenty years following the Taliban's removal from power in 2001, Afghanistan experienced a dramatic increase in poppy cultivation and opiate production, establishing itself as the world's leading producer of heroin.

Additionally, border officials at strategic crossings have allowed trafficking to continue for a share of the profits. As Farhad Basharyar, former Afghan diplomat and counter-narcotics expert, pointed out in a 2024 interview with the author, corruption was rampant within Afghanistan's justice

and law enforcement agencies, allowing powerful drug lords and criminal networks to operate openly, evade prosecution, and avoid accountability. He further stated that high-level government officials and their relatives were frequently involved in narcotics trafficking and enjoyed political immunity, preventing their arrest and prosecution. This lack of accountability facilitated an environment conducive to drug trafficking.²

High levels of opium production did not begin only after the 2001 U.S. invasion; rather, opium poppy cultivation and heroin production are characteristic of Afghanistan and were already thriving during the Taliban's first rule. The Taliban's attempted ban on opium cultivation in 2000 was difficult to sustain. During the Taliban's first rule in the 1990s, their stance on opium evolved in response to political and economic pressures. Initially, they sought to prohibit poppy cultivation, viewing it as anti-Islamic. However, over time, the Taliban adapted to the economic realities, opting for a tax-and-regulate model. This shift allowed them to issue licenses to farmers and impose taxes on opium production, generating significant revenue. In 2000, the Taliban attempted a total ban on poppy cultivation, reducing production dramatically. Although hailed internationally at the time as one of the most effective bans in history, the move created severe economic

hardships for farmers, sparking unrest and uprisings, such as the notable revolt in Achin in April 2001. Ultimately, the Taliban rescinded the ban by late 2001, prioritizing political stability and financial resources over the ban's enforcement.³

Under heavy pressure from the U.S., countering opium production became central to Afghanistan's drug policy.

After the Taliban was ousted in 2001, the new Afghan Republic government upheld the policy of banning opium to align with international drug control standards. Under heavy pressure from the U.S., countering opium production became central to Afghanistan's drug policy. The United States and other international donors invested several billion dollars to combat the illicit drug trade, fearing it was fueling the Taliban insurgency and fostering organized crime and corruption within Afghan government institutions. Between 2002 and 2018, the U.S. provided nearly \$8.78 billion in aid for counter-narcotics efforts, principally supporting eradication campaigns across the country. However, these campaigns were largely ineffective and politically damaging. Afghanistan's drug economy saw significant growth following the US-

and NATO-led invasion in 2001.⁴

Between 2002 and 2020, the area used for poppy cultivation nearly tripled, and the country also began manufacturing low-cost methamphetamine, utilizing the locally abundant ephedra plant. The drug economy peaked in 2017, surpassing any figures recorded globally since World War II.⁵ In 2020, Afghanistan saw opium poppy cultivation reach approximately 224,000 hectares, one of the highest levels in its history, and the United Nations reported that Afghanistan was responsible for approximately 85 percent of the world's opium production.⁶ Under the previous Republic, the drug trade dominated Afghanistan's economy, offering full-time jobs to more than half a million people.

National and Regional Counter Narcotic Strategies and Policies

In the previous government, various documents, mechanisms, and initiatives at the national, regional, and international levels aimed to prevent and combat opium cultivation and drug trafficking. Afghanistan's legal framework includes the Constitution of Afghanistan, Penal Code, Law on Counter Narcotics and Intoxicants, National Action Plan on Counter Narcotics, etc. The previous government of Afghanistan also collaborated with regional countries

on combating drug trafficking, precursors, and psychotropic substances through bilateral and multilateral frameworks. A Regional Counter-Narcotics Strategy was developed by Afghanistan's Ministry of Counter-Narcotics in October 2017. This strategy comprehensively addressed the regional aspect of drug trafficking, aiming to resolve related challenges upon implementation. Afghanistan has also signed counter-narcotics agreements with countries such as Pakistan, Iran, China, Tajikistan, Uzbekistan, Kazakhstan, Russia, and the United Arab Emirates.

Key Regional and Multilateral Mechanisms

- Triangular Initiative among Afghanistan, Iran, and Pakistan;
- Triangular Initiative among Afghanistan, Kyrgyzstan, and Tajikistan (AKT);
- UNODC Program for Afghanistan and the Region;
- Central Asian Regional Information and Coordination Center (CARICC);
- Heart of Asia–Istanbul Process;
- Shanghai Cooperation Organization (SCO);
- Commission on Narcotic Drugs (CND);
- The Paris Pact Initiative

Key International Conventions on Drug Control

- Single Convention on Narcotic Drugs, 1961, amended by the 1972 Protocol;
- Convention on Psychotropic Substances, 1971;
- United Nations Convention against Illicit Traffic in Narcotic Drugs and Psychotropic Substances, 1988;
- United Nations Convention against Transnational Organized Crime, 2000.

Implementation Challenges

The Republic of Afghanistan's counter-narcotics mechanisms were designed to address drug trafficking, precursors, and psychotropic substances comprehensively. However, their effectiveness was hindered by significant obstacles, including insufficient political will and the involvement of Pakistan, Iran, and other countries in the criminal economy linked to this issue. The relevant authorities did not systematically or regularly follow up on implementing bilateral and multilateral commitments. Some bilateral agreements did not reflect the current drug situation, and there was a need to establish cooperation and mechanisms with certain countries. There was insufficient sharing of scientific research on new drugs and psychotropic substances

among regional governments, which limited the collective ability to address these challenges effectively.⁷

According to Merwais Qaderi, former deputy of the Directorate of Security Cooperation and Borders Affairs at the Afghanistan Ministry of Foreign Affairs, while the existing counter-narcotic policies may have seemed logical and feasible in the documentation for an idealized government, they revealed serious gaps in practical application under actual circumstances. Although narcotics were considered a major threat to Afghanistan's national security in official documents, this perception was not shared widely among the public. In areas where narcotics were cultivated, locals saw it as an economic opportunity and did not cooperate with the government's eradication efforts.⁸

Access to regional and global markets for Afghanistan's legal agricultural products was hindered, diminishing economic opportunities for farmers and the incentives to grow within the formal economy. However, the continued appetite around the globe for narcotics drove a rise in opium poppy cultivation across Afghanistan. Besmillah Taban, General Director of Crime Investigation at the Afghanistan Ministry of Interior, argued in an interview with the author that the lack of a unified regional strategy on narcotics acted as both a challenge for the



Afghan police officers destroying opium poppy flowers fields near Faizabad city in Afghanistan. (Adobe Stock)

government and an opportunity for the narcotics trade. The open borders of Afghanistan and the lack of interest among neighboring countries in preventing narcotics trafficking further stimulated the trade. The safe trafficking routes from Afghanistan to other regions and the involvement of large international networks gave Afghan narcotics producers confidence that their products would reach markets and provide substantial income. He further suggested that at the very least, narcotics should have been treated as a zero-tolerance priority within the broader fight against terrorism.⁹

Trafficking networks also exploited the old routes, using them to smuggle drugs from Afghanistan to destinations across the region and beyond.

It was also through these same networks that precursors and psychotropic substances entered the country, which in turn made the manufacturing of synthetic drugs such as methamphetamine possible.¹⁰ Moreover, the Taliban and its affiliated terrorist networks thrived on the drug trade as a mainstay of income generation. These groups funded their activities and grew by controlling the supply chains for cultivation, production, and trafficking.

International Enforcement Efforts and Effectiveness

The counternarcotics policies implemented during the 2000s largely failed to curtail the illicit economy and inadvertently

hindered broader goals of peace, state-building, and economic recovery. Qaderi stated that counter-narcotics policies and strategies in Afghanistan had only limited effectiveness under the Republic because despite having these policies signed and in place, there was no efficient mechanism to implement, enforce and monitor their progress. The lack of a robust reporting system to track outcomes and evaluate the effectiveness of these strategies led to their neglect and insufficient attention from relevant authorities.¹¹ Similarly, Naeem Poyesh, former consular officer at the Afghanistan Embassy in Vienna, emphasized to the author that international counter-narcotics efforts lacked coordination.

The United States and other international stakeholders funded and implemented fragmented programs, often without regular evaluations to assess effectiveness.

The United States and other international stakeholders funded and implemented fragmented programs, often without regular evaluations to assess effectiveness. For example, programs offering farmers alternative livelihoods inadvertently incentivized further narcotics cultivation. Many such

incentives targeted insecure provinces, where funds were often misused by warlords and local commanders. In some cases, recipients used these funds to purchase additional land and increase poppy cultivation rather than transition to alternative crops.¹²

Initially, the U.S. intervention in Afghanistan focused on dismantling al Qaeda and enacting regime change, with drug-related issues deemed secondary. The military recognized that eradicating poppy crops would jeopardize intelligence-gathering efforts against the Taliban and al Qaeda. Relying on powerful warlords for military support and intelligence further complicated the situation, as many of these warlords were deeply enmeshed in the drug trade.¹³ Consequently, until 2003, U.S. policy was essentially hands-off regarding opium production. In addition, Britain was designated as the lead nation for counternarcotics in 2002 but encountered significant challenges with its compensated eradication program, which aimed to pay farmers for eliminating poppy fields. Their initiative was marred by corruption and was abandoned within a year. By 2004, the focus shifted to interdiction, targeting large traffickers and processing facilities, but this strategy was often exploited by local strongmen to eliminate competition rather than targeting the actual masterminds of the drug trade.¹⁴ This resulted in a more vertically integrated drug industry and allowed the Taliban to re-establish its presence in the

drug trade as they were seen as protectors of traffickers.

The U.S. eventually invested billions of dollars in Afghanistan to eliminate opium production and trafficking to disrupt the Taliban's funding sources. These efforts included airstrikes targeting poppy fields in areas controlled by the Taliban, burning stockpiles of opium, and conducting raids on drug laboratories. By 2004 and 2005, there were renewed calls in the U.S. for a stringent eradication campaign, including aerial spraying, which led to violent resistance from local populations and significant social unrest. NATO's interdiction policies from 2008 onward did not successfully weaken the Taliban nor address the structural issues driving the poppy economy. At the peak of the crisis, during the 2017-2018 period poppy cultivation spanned over 330,000 hectares. Between 2016 and 2020, U.S. efforts to bomb Taliban drug facilities yielded limited results.¹⁵ None of the counterdrug initiatives implemented by the U.S., its allies, or the Afghan government achieved lasting reductions in poppy cultivation or opium production.

International support for counter-narcotics policy implementation was fragmented and lacked a unified action plan; efforts were disconnected and tailored to each country's interest in counter-narcotics. Basharyar noted that one of the significant failures

in counter-narcotics efforts was the lack of commitment from regional countries. Although neighboring nations often pledged cooperation and information-sharing on regional platforms, these commitments frequently went unfulfilled. The political interests of neighboring countries often overshadowed genuine collaboration with Afghanistan, with each nation focusing on its own agenda.¹⁶

Towards the end of the Republic period, the 2020 U.S.-Taliban "Doha" agreement further restricted military actions against drug operations, and rural development initiatives failed to address the root causes of poppy cultivation, struggling to maintain viability amidst growing insecurity and the Taliban's expanding control. Ultimately, effective measures to suppress the supply of drugs have never succeeded in conflict zones in Afghanistan. Although some success was achieved in reducing cultivation, the eradication efforts often failed to provide alternative livelihoods, leading to increased poverty and desperation among farmers. Many were driven into debt and forced to sell their daughters or flee to Pakistan, where they sometimes ended up in radical madrassas, rejoining the Taliban. Corruption plagued eradication efforts, with powerful elites managing to evade penalties while the most vulnerable farmers suffered the consequences. Ultimately, reductions in opium poppy cultivation achieved through

eradication were rarely sustained.

Taliban and Narcotics during the Republic Government

Before taking power, the Taliban profited significantly from the drug trade, alongside various criminal gangs, elements of the Afghan police, militias, tribal elites, and former warlords-turned-government officials. The Taliban, with its extensive territorial control, collected taxes on cultivation, processing, and smuggling, even permitting its fighters to harvest opium during lulls in conflict. This involvement led to the Taliban generating hundreds of millions annually from the Afghan poppy economy, with estimates in 2020 reaching as high as \$416 million.¹⁷ According to Basharyar, several southern provinces, including Helmand, Kandahar, Uruzgan, Nimroz, Farah, and others, remained insecure, with the government unable to maintain effective control. Each year, around the time of the poppy harvest, the Taliban, drug traffickers, and mafias would orchestrate artificial conflicts, leveraging the instability to facilitate drug trade.¹⁸

As anti-drug policies alienated rural farmers reliant on the opium trade for survival, the Taliban capitalized on this discontent, gaining support among those communities. This growing rural base contributed to the Taliban's

eventual return to power in 2021. Former Interior Ministry official Taban explained that terrorist organizations such as the Taliban, along with certain organized crime groups, capitalized on farmers' struggles for economic survival. They fueled insecurity and mobilized communities to oppose government initiatives, simultaneously using this dynamic to fund their operations.¹⁹ Thus, eradication efforts did not effectively dismantle the Taliban's financial foundation; instead, they strengthened the group by creating economic refugees who turned to it for support. These policies also alienated local populations, diminishing their willingness to cooperate with counterinsurgents while fostering intelligence sharing with the Taliban.

Taliban's Return to Power and Opium Production: 2021-2024

Afghanistan has made several attempts to ban opium in the past, but none were as successful as the recent effort. For the past 30 years, the country has been the world's largest producer of illicit heroin. As noted above, the Taliban played a significant role in sustaining the trade, protecting farmers, and fueling political opposition whenever the Afghan government tried to enforce a ban. However, in April 2022, Taliban leader Haibatullah Akhundzada issued a decree prohibiting the cultivation of

Opium production

Figure 1: Afghan opium production and poppy cultivation estimates, 2000-2024

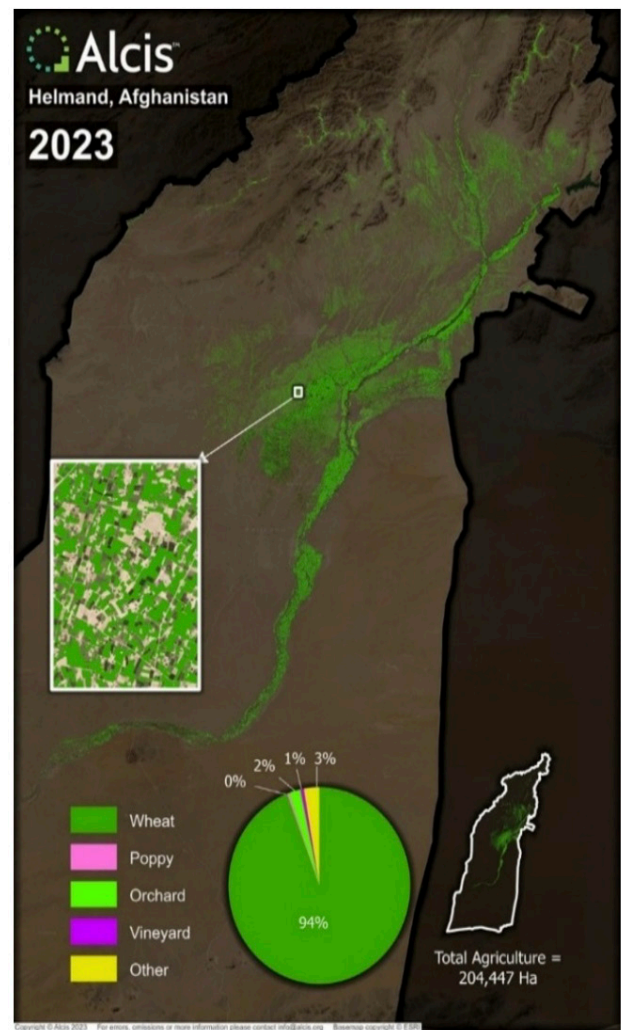
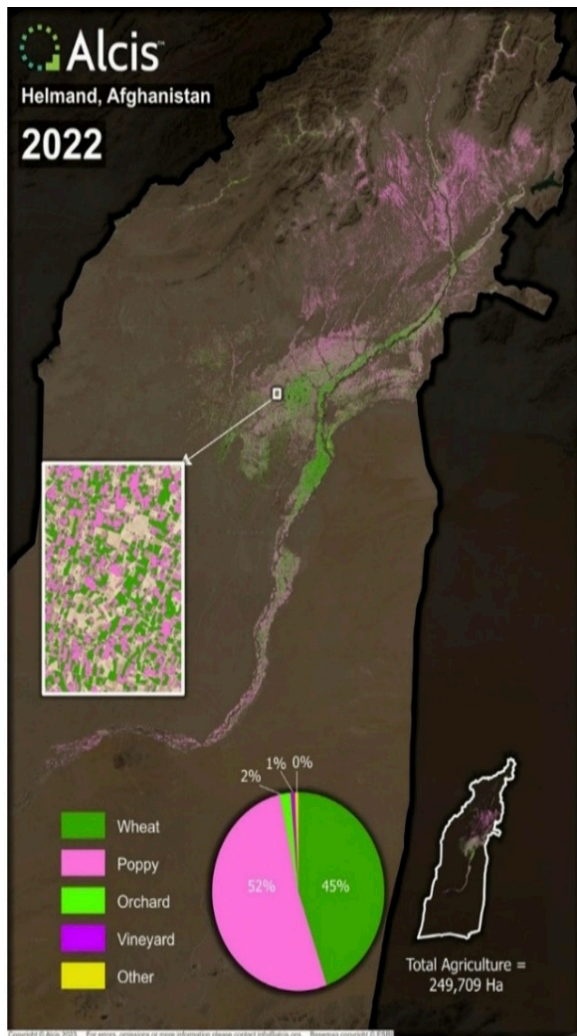


poppy, the source of opium used to produce heroin. Those who violate this ban face the destruction of their crops and penalties under Sharia law.²⁰ The Taliban's decree did not affect the 2022 opium harvest, which, according to the United Nations Office on Drugs and Crime (UNODC), saw a one-third increase compared to 2021. The crackdown was focused on the second opium crop of the season, which was significantly smaller than the first.²¹

Opium poppy production in Afghanistan has plummeted following this ban on poppy cultivation, according to a United Nations report. The UN Office on Drugs and Crime (UNODC) revealed that opium cultivation dropped dramatically from 233,000 hectares in 2022 to just 10,800 hectares in

2023, a 95% reduction that slashed output to 333 tons, resulting in a staggering \$1 billion revenue loss for Afghan farmers. This sharp decline has put immense pressure on Afghan farmers, many of whom relied on poppy cultivation for their livelihoods. While UN officials acknowledge that this decline could aid efforts against the illicit opium trade, they also warn of potential risks for a population that has historically relied on the poppy trade for its livelihood. Many farmers have turned to growing wheat, which provides significantly less income than poppy cultivation.²²

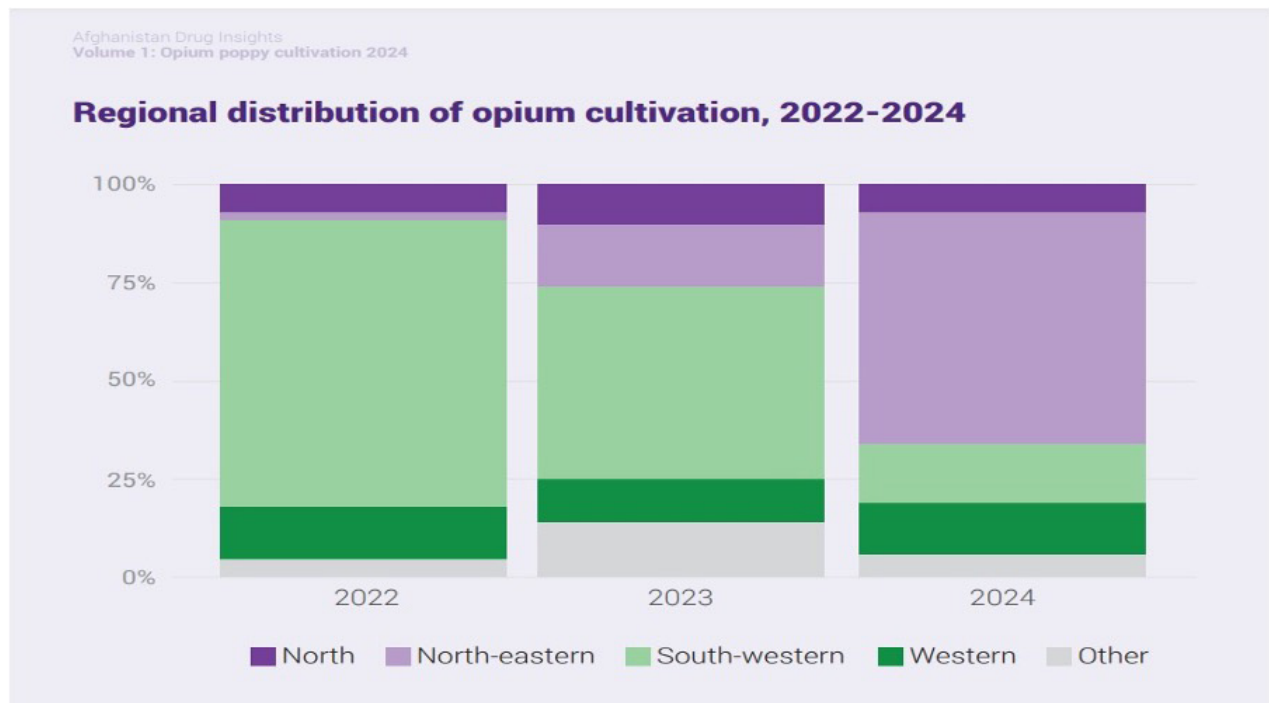
Satellite imagery analyzed by Alcis, alongside research by David Mansfield, a leading expert on Afghanistan's opium sector, reveals



that the Taliban's 2022 opium ban has been highly effective. In Helmand, the country's leading opium-producing province, the area dedicated to poppy farming plummeted from over 129,000 hectares in 2022 to just 740 hectares by April 2023. Similarly, Nangarhar, another key opium-producing province, saw a reduction from more than 7,000 hectares in 2022 to only 865 hectares in 2023. This trend was consistent across southern and southwestern Afghanistan, although reductions in provinces like Badakhshan were less pronounced due to their historically lower opium

production. This current decline is notable, especially considering the larger scale of the opium economy today, estimated at 233,000 hectares in 2022, compared to around 82,000 hectares in 2000.²³

However, in November 2024, the United Nations Office on Drugs and Crime (UNODC) reported a 19% increase in opium cultivation in Afghanistan compared to the previous year, with the area under cultivation reaching approximately 12,800 hectares. Despite the recent increase, cultivation levels remain significantly lower than in 2022,



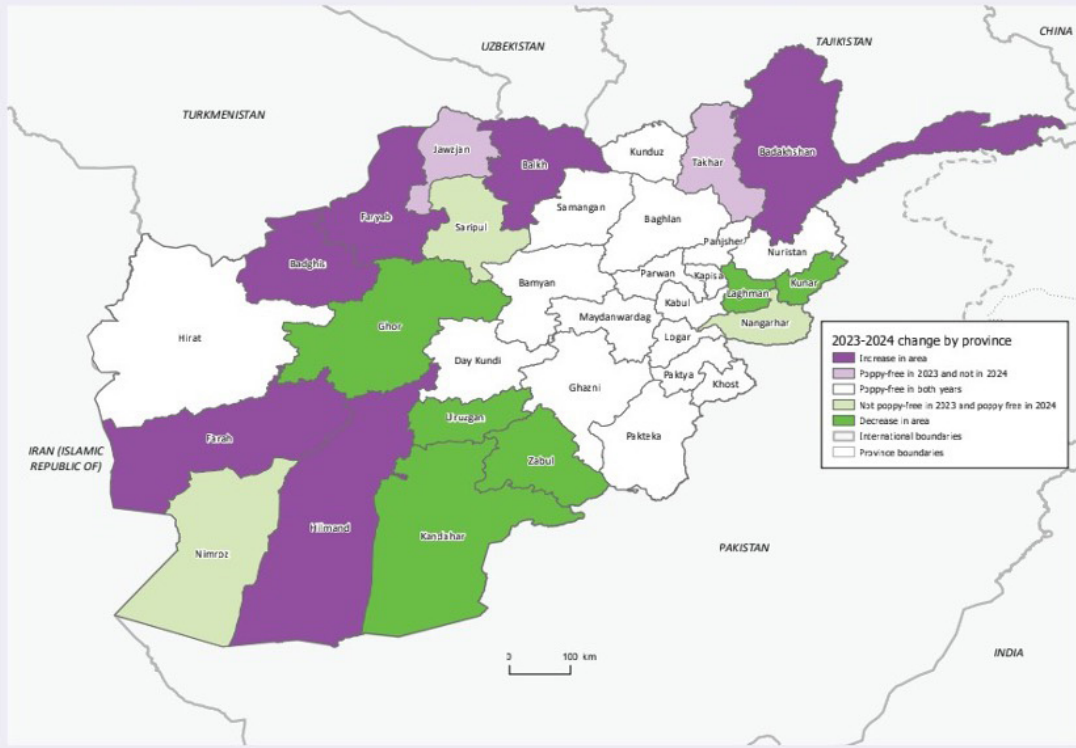
when 232,000 hectares were used for opium poppy farming. The report also revealed a geographic shift in cultivation. While the southwestern provinces had historically been the epicenter of opium farming, 2024 saw the northeastern provinces account for 59% of the cultivation—a staggering 381% rise compared to 2023.²⁴

The southwest, which borders Pakistan and was responsible for nearly half of Afghanistan's opium production in 2023, experienced a steep 65% decline in cultivation in 2024. Among the southwestern provinces, only Helmand recorded an increase, with cultivation skyrocketing by 434%—though from an exceptionally low starting point. In contrast, the northeastern region, bordering Turkmenistan,

Uzbekistan, and Tajikistan, emerged as the new epicenter of opium farming, with cultivation surging by 381% to 7,563 hectares—four times the area cultivated in the southwest, now the second-largest production region. Almost all the northeast's output came from Badakhshan, a mountainous province that includes the Hindu Kush range and Afghanistan's short border with China.²⁵²⁶

The Taliban's Opium Ban Policies and Enforcement

The Taliban implemented a gradual approach to its opium ban. Initially, the ban was announced without eradicating the bumper crop of poppy fields ready for harvest in 2022, avoiding

Change in opium cultivation by province, 2023-2024

potential backlash. This led to some speculation that the ban lacked seriousness. However, the Taliban did focus on eradicating the smaller spring and summer crops planted later in 2022 to discourage further cultivation. These actions communicated clear warnings to rural communities before the fall 2022 planting season, effectively deterring the planting of opium poppy in southern and southwestern Afghanistan. Most of the reduction in poppy cultivation stemmed from a lack of new plantings, along with the eradication of some already planted fields.²⁷

In 2022, opium cultivation in Afghanistan surged by 32%, despite the Taliban's proclaimed ban on narcotics. The 2022 opium crop was the most profitable in years, with cultivation covering around 576,000 acres, making it one of the largest harvests since monitoring began in 1994. This increase occurred amid Afghanistan's deepening economic and humanitarian crises. Southern Afghanistan, long the hub of opium production, remained the epicenter, accounting for 73% of the total cultivation area. Despite the 2022 decree, enforcement was reportedly lax, and much of the opium harvest was left untouched. Given the severe economic and humanitarian crisis gripping the country since August

2021, it will be extremely difficult, if not impossible, for the regime to eradicate an industry that so many impoverished Afghans depend on for their livelihood.²⁸

While the Taliban did not eradicate the winter crop, it appeared that the opium trade originating in crops harvested in 2022 and earlier has continued. With the substantial decline in new poppy cultivation in 2023, much of the ongoing trade likely relies on older supplies of opium, with the UNODC estimating production at 6,800 metric tons in 2021 and 6,200 metric tons in 2022. It remains uncertain whether this trade allowance will be temporary or more permanent; during the earlier ban in 2000-2001, opiate trade continued without interruption.²⁹

Current evidence indicates that the Taliban has largely failed to enforce its ban on drug trafficking as the levels have remained high or increased since their takeover of Afghanistan. A 2023 report by David Mansfield suggests that the Taliban has increased revenue by implementing stricter border controls. However, these measures seem to prioritize imports over exports, with Mansfield noting a lack of evidence that the Taliban's enforcement extends to curbing drug trafficking. In fact, significant drug seizures indicate that smuggling operations remain robust, with no sign of a decrease in narcotics along the

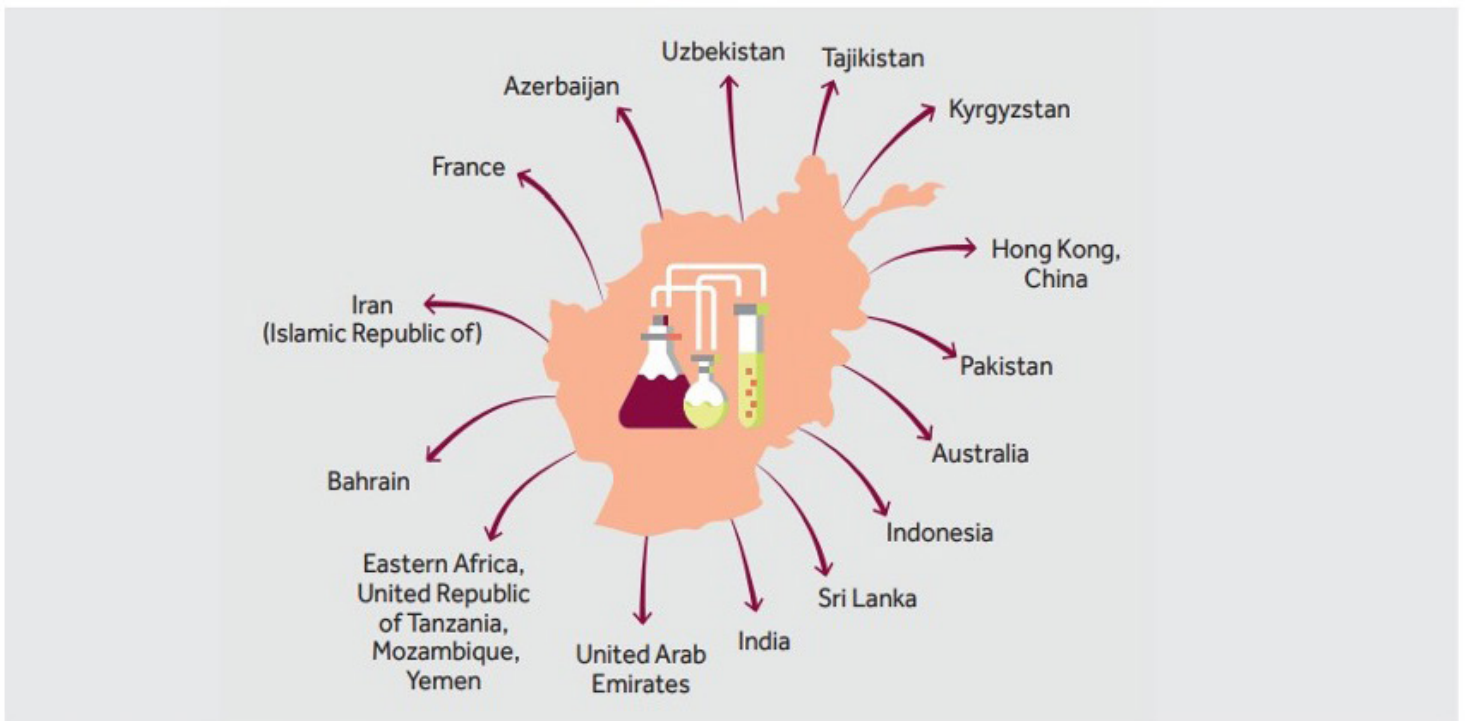
primary trafficking routes out of Afghanistan.³⁰

Methamphetamine

While the Taliban and other terrorist networks derived a significant portion of their funding from opium cultivation and heroin production, the emergence of methamphetamine has created new profit margins for the Taliban. The first recorded seizure of methamphetamine in Afghanistan, amounting to 4 grams, occurred in 2008. By 2019, methamphetamine seizures had risen to 1,250 kilograms. Herat Province, particularly the Ghurian District, along with Farah and Nimroz Provinces, are considered major centers of methamphetamine production in Afghanistan. As the raw materials for producing methamphetamine are cheaper than those for heroin, and the primary precursor, ephedrine, is also produced in Afghanistan, methamphetamine production does not require large laboratories. Moreover, the profit margins from methamphetamine production are significantly higher than those for heroin.³¹

As an insurgent group, the Taliban controlled 60% of methamphetamine production laboratories in Farah and Nimroz provinces.³² It was also reported that methamphetamine production generated approximately \$4.2 million annually in taxes paid

Reported destination of methamphetamine originating in Afghanistan, 2019 and 2022

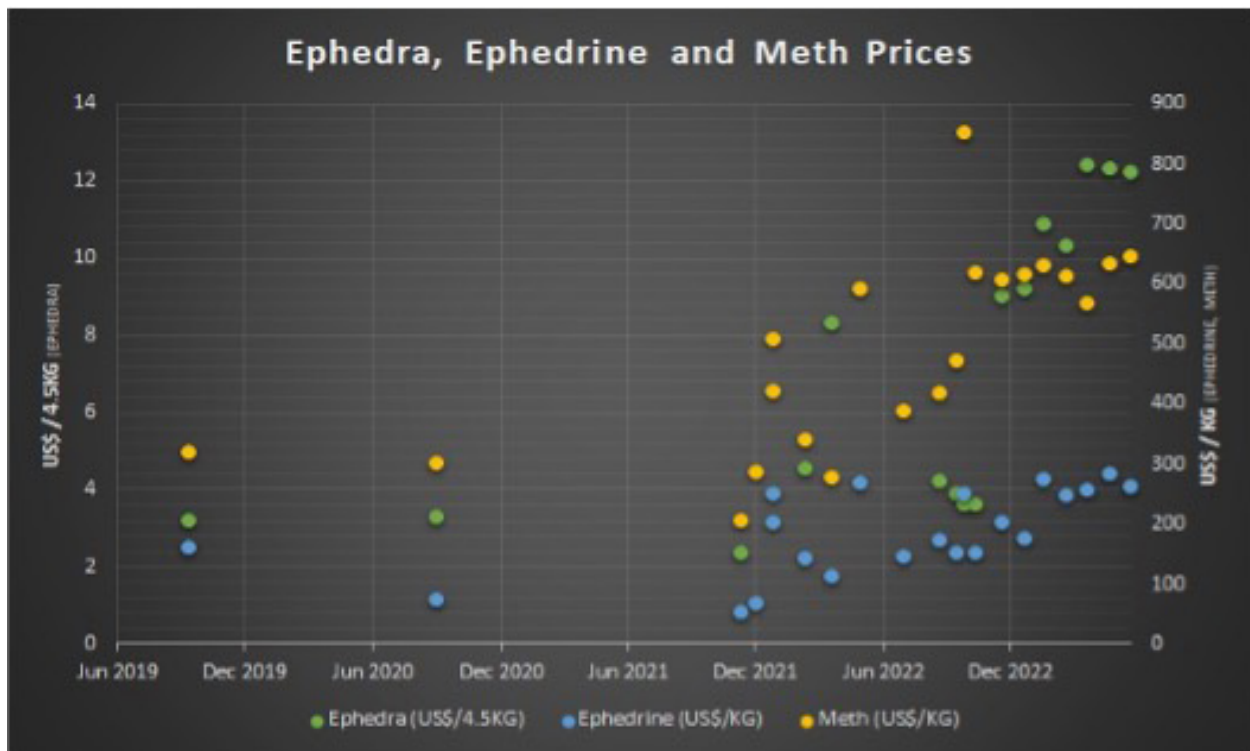


Source: UNODC, Drugs Monitoring Platform

to the Taliban. Drug trafficking organizations in Afghanistan have already established trafficking routes for opiate derivatives, which were easily utilized for smuggling any type of narcotics. Methamphetamine has been seized at Afghanistan's border crossing points, including Islam Qala (on the Afghanistan-Iran border), Spin Boldak (on the Durand Line between Afghanistan and Pakistan), and Hamid Karzai International Airport, from where it is trafficked abroad via air routes.³³

By early November 2018, the supply was so abundant that ephedra prices had plummeted, dropping from \$1.80 per kilogram to just \$0.63 per kilogram, but in

December 2022, the Taliban quietly imposed a ban on the plant, causing prices to surge. A focal point of this effort was Abdul Wadood bazaar in Bakwa, a central hub for the ephedra trade, which supplies meth labs across Afghanistan. In 2022, the Taliban closed the market and dismantled surrounding ephedrine labs, significantly disrupting production. High-resolution satellite imagery revealed a stark decline in operational labs from 174 in early 2020 to zero by September 2022. However, the decree, limited to a few provinces, came too late to impact the recent harvest. More importantly, it actually benefited meth and ephedrine producers by driving up profits, while also increasing the Taliban's revenue



through fines on those transporting ephedra.³⁴ Naeem Poyesh agreed with the issue that although the Taliban has taken steps to shut down methamphetamine laboratories, production has merely shifted to remote rural areas where oversight is difficult. These rural labs, located near ephedra plant sources, continue to produce methamphetamine. The Taliban’s ban on methamphetamine production appears largely superficial, with enforcement focusing primarily on high-visibility areas.³⁵ Thus, while the Taliban’s actions caused significant disruption, the methamphetamine industry’s adaptability suggests that elimination remains unlikely.

National Implications of the Taliban’s Counter-Narcotics Policy

Economic Consequences of the Opium Ban

Since the Taliban took control in August 2021 following the withdrawal of US-led forces, Afghanistan has faced severe humanitarian and financial challenges. The Taliban has struggled to revitalize the economy due to international sanctions and

its isolation from the global financial system, as well as the loss of billions in international aid from the IMF, World Bank, the United States, and the European Union, while its central bank reserves remain frozen in the U.S. International humanitarian assistance and the informal economy can only partially compensate for these losses, and a long-term ban on poppy farming will lead to widespread unrest and social instability.

The Taliban's opium ban has had a massive economic impact on Afghanistan, particularly for its rural economy.

The Taliban's opium ban has had a massive economic impact on Afghanistan, particularly for its rural economy. According to research by David Mansfield, in 2022 the opium industry employed approximately 450,000 people and generated \$1.3 billion in net income for farmers. Beyond direct cultivation, the industry supported millions through weeding, harvesting, and trade-related jobs. However, rampant inflation and soaring food prices, up by 35%, meant that even with increased earnings, many farmers struggled to make ends meet.³⁶ Sadia Tajali, a reporter at Freedom Radio, claims that for Afghan women, the effects are especially severe. Afghanistan's patriarchal

society, already fragile, becomes even more dysfunctional as communities become involved in the narcotics trade. In some cases, women work in narcotics cultivation or production for financial reasons, while others are coerced into participating. In households with addicted men, domestic violence has increased, and some families have resorted to forced and underage marriages of their daughters to cope financially.³⁷

The economic fallout from the ban varies widely among Afghanistan's farmers, driven by differences in land ownership and access to resources. Wealthier landowners in the south and southwest, who dominate poppy cultivation, have been able to profit significantly from rising opium prices by stockpiling their harvests.³⁸ In 2022, opium prices soared to as high as \$360 per kilogram. This allowed well-resourced farmers to sell small portions of their reserves while holding the rest, leveraging their inventories for greater financial gain. In contrast, land-poor farmers, sharecroppers, and itinerant workers are disproportionately affected. These groups often sell their entire yield at harvest to meet immediate needs, leaving them without reserves to benefit from rising prices.³⁹ With limited income alternatives and no surplus to draw on, many face economic hardship, relying on seasonal labor or selling assets to survive.



Opium poppy flowers in hands of police officers destroying poppy fields near Faizabad city in Afghanistan. (Adobe Stock)

In northeastern Afghanistan, particularly among ethnic minorities who opposed Taliban rule in the 1990s, there has been resistance to the ban. Some areas, such as Nangarhar province, continue to cultivate and trade opium, driven by both economic incentives—fewer competitors in the market—and political defiance. The UNODC has warned that Afghanistan's reliance on opium highlights the urgent need for international assistance to address the country's economic and humanitarian challenges. Switching from poppy to wheat, as many farmers have done, is not a viable long-term solution. Wheat is a low-value crop, and most Afghan households do not achieve food security through subsistence farming. Many rely on cash crops, livestock, or other work to purchase food. While wheat may temporarily replace opium, more sustainable options like fruits or tree

crops require substantial time and investment.⁴⁰

Social Impacts on Rural Communities

Afghanistan's cultivation practices are deeply embedded in the socio-economic structure of rural communities. For many farmers, opium poppy cultivation is a survival strategy, driven by poverty and the absence of alternative livelihoods. The country's arid climate and limited access to agricultural resources exacerbate this reliance, making opium a lucrative, though perilous, economic option.

Wealthier households who have stored opium from the 2022 bumper crop can sell their reserves

to offset their losses, but this buffer won't last forever. Poorer households, already struggling, may resort to more drastic coping strategies, such as selling livestock, skipping medical care, eating less, or marrying off daughters early. This worsening economic situation may also drive more Afghans to leave the country in search of better opportunities, particularly in Europe, where the cost of smuggling is low compared to potential gains from remittances. Other options for work, like urban jobs or military service, have largely disappeared since August 2021.⁴¹

For many land-poor families, migration has become a critical survival strategy. Provinces like Nangarhar, where small landholdings and high population densities prevail, are particularly vulnerable. Without sufficient land to grow food or secure alternative income, families are increasingly selling long-term assets such as land and vehicles to fund migration. Afghanistan's longstanding networks of migration, coupled with recent economic pressures, suggest that a continued ban could trigger a significant increase in outmigration. For Europe, this could present a stark choice between addressing the fallout of Afghanistan's drug ban or dealing with a surge in Afghan migrants.⁴²

In addition, Afghanistan faces significant domestic challenges linked to drug use, with increasing

rates of substance dependency posing a growing public health crisis. Many impoverished Afghans are turning to narcotics as a means of escape, and tragically, many addicts are abandoned to die in public spaces. The rising addiction rates are highlighted with prevalence rates in some regions exceeding 10% of the adult population, a significant public health concern.⁴³

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Journalist Tajali highlighted that increased drug production and availability have fueled addiction. As addiction rates rise, more of the younger generation are pulled into the drug trade's demand-supply cycle, further strengthening the influence of drug mafias. With schools and universities closed and widespread unemployment, Afghanistan's youth face immense social and economic pressures. Many are turning to drugs as a means of escape, which ultimately deteriorates their physical and mental health.⁴⁴ The Taliban does not have an effective policy to tackle this issue. When they intervene, their methods are often harsh, involving the public humiliation of

drug users through beatings, head shaving, and water dousing.

Political Implications for the Taliban: Rise in Violence and Local Resistance

The Taliban's political support, particularly from influential landowners and those involved in the drug trade, could become harder to maintain if the ban continues into 2025. In his 2023 analysis for Alcis, David Mansfield warned that by enforcing a drug ban and pushing for crop destruction in remote areas without providing alternatives, the Taliban risks inciting rural unrest and dissent within its ranks. This is especially true for Taliban members from these regions who are accountable to their families and local communities.⁴⁵

The key question now is whether the Taliban will maintain the opium poppy ban for the coming years. While there have been past successes in Afghanistan with opium bans, such as the temporary national ban in 2000-2001 and regional bans in provinces like Nangarhar and Helmand, sustaining such bans has historically proven difficult. The 2000 ban, for instance, contributed to the Taliban's political weakening and, partially, to their swift defeat following 9/11. If the current ban continues, increasing resistance is likely, especially as farmers deplete

their opium stocks and begin to suffer economically. Landowners, particularly those in the south and southwest, who are core Taliban supporters, may start lobbying against the ban, while resistance is already growing in the east and northeast, where landholdings are smaller.⁴⁶

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The potential for discontent among the Taliban's mid-level commanders poses a particularly serious risk to the regime's stability. While the Taliban maintained cohesion during its insurgency, the complexities of governance reveal differing views among various factions on issues like inclusivity, economic policy, and foreign relations. Younger commanders, often more extreme than their older counterparts, could challenge the leadership's authority if their financial needs are not met. To maintain control, the Taliban must balance these competing

interests while ensuring that key commanders and fighters have adequate income to discourage defections. The ban on poppy cultivation will severely limit their financial resources. The Taliban's rapid advance in 2020-2021 relied on promising local leaders the ability to continue benefiting from local economies, including drug trafficking. If the Taliban attempts to monopolize these markets, it risks reigniting conflict and opposition.⁴⁷

Additionally, the regime faces other challenges, including integrating former Afghan security forces, many of whom are now unemployed. These individuals may resort to banditry or join new militias without a stable income. Another challenge is terrorism. The Taliban's revenue from informal trade with neighboring countries, which has provided hundreds of millions in taxes, relies on their ability to address counterterrorism concerns from Iran, Russia, and China. These nations prioritize security over economic ties, and outside of China and some Gulf states, their financial support is limited.⁴⁸

Global and Regional Impacts on Drug Trade and Markets

Historically, Afghanistan has dominated the global opium trade, supplying over 80% of the world's opium and serving as a major heroin source for Europe and Asia as the heroin made from Afghan opium

makes up 95% of the market in Europe.⁴⁹ Under the previous Taliban regime, this trade contributed an estimated \$400 million to the group's revenue between 2018 and 2019.⁵⁰ On a global scale, Afghanistan's opium production has profound implications. It sustains international heroin markets, and variations in Afghan production levels can disrupt supply chains worldwide.

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The trafficking of narcotics and other psychotropic substances from Afghanistan to the region and beyond primarily occurs through three routes: the southern route, the northern route, and the Balkan route.⁵¹ The trafficking patterns vary depending on the destination country. Afghanistan serves as a major supply market for neighboring countries (mainly Iran and Pakistan), Central Asia, the Caucasus, India, Europe, the Middle East, and the Near East, as well as South Asia and Africa. To a lesser extent, it also supplies Southeast Asia, North America, and Oceania.

The ban's effects on global drug supplies will take time to manifest. After the Taliban's previous ban in 2000, it took 18 months to two years for heroin prices in Europe to rise, primarily through reduced purity. A similar trend could occur if the current ban continues, potentially leading to higher overdose risks for drug users. While the U.S. opioid crisis did not stem from Afghanistan's product and has shifted to the more dangerous fentanyl, Europe, Asia, and Africa's opioid markets have long been fueled by Afghan heroin. There are concerns that the ban could lead to increased fentanyl use in these regions, causing a similar crisis.⁵²

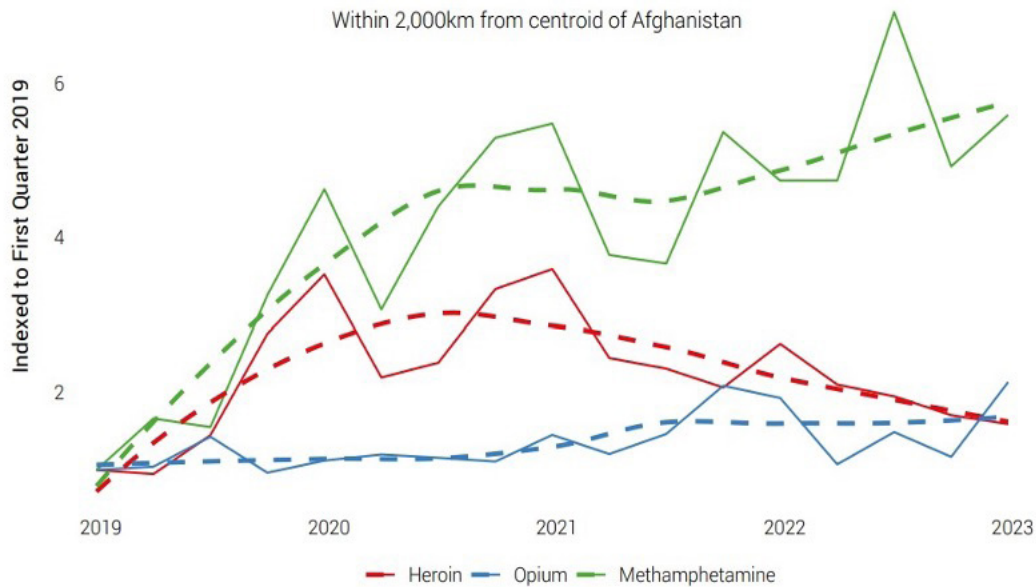
The ban has not significantly impacted Western markets due to extensive past stockpiling by those involved in drug trafficking. The dynamics of the market have remained consistent over the past two decades. David Mansfield notes that opium and heroin prices are at their highest levels in 20 years with reduced poppy cultivation. This trend indicates that substantial previous stockpiles remain and trade in heroin is still ongoing. Additionally, drug seizures in neighboring countries suggest that a heroin shortage is not on the horizon. While the poppy trade often dominates the conversation, drug trafficking out of Afghanistan, particularly methamphetamine, remains high.⁵³

While the poppy trade often dominates the conversation, drug trafficking out of Afghanistan, particularly methamphetamine, remains high.

The "Balkan Route" and the "Northern Route" are the primary pathways through which Afghan heroin is smuggled into Europe and Asia. Major highways continue to serve as key routes, with large quantities of heroin and methamphetamine flowing along the Balkan Route from Pakistan, Iran, and Turkey into Europe, as well as to other regions. These trafficking routes not only support organized crime globally but also fuel insecurity and instability in regions surrounding Afghanistan, as trafficking routes often coincide with areas of political and social unrest.⁵⁴

South Asia:

Drug trafficking has increased southward since the Taliban's rise to power and seizures have been substantial. At the Torkham border crossing between Afghanistan and Pakistan, authorities seized an unprecedented amount of drugs in late 2021 and early 2022, including a record 130 kilograms of heroin. In

Trend in quarterly counts of seizure events relative to Q1 2019

October, Peshawar witnessed one of its largest methamphetamine busts. In November huge quantities of narcotics reached Pakistan's coastal areas in Balochistan and Karachi.⁵⁵

In May, Pakistan's Anti-Narcotics Force confiscated over a ton of opiates and 255 kilograms of methamphetamine in Balochistan. Around the same time, the Pakistani Navy intercepted 4.5 tons of drugs in the northern Arabian Sea. Pakistan is not only a transit country for Afghanistan's methamphetamine but also a major market, especially in educational institutions. Afghan-origin drugs are also spreading across South Asia. In Sri Lanka, multiple maritime drug hauls have been reported since the Taliban takeover, including a 325-kilogram

seizure of heroin and meth in April. In July, Nepal recorded an unusually large heroin bust, which authorities suspect originated in Afghanistan, indicating further growth in the regional drug trade.⁵⁶

India is a particularly concerning hotspot for Afghan-origin drug trafficking due to its large population and high number of opioid users. In January, the Director-General of India's Narcotics Control Bureau, S.N. Pradhan, warned that the Taliban's rise could intensify drug trafficking via established smuggling routes, including those through Punjab (sometimes using drones) and by sea to India's western coast. Notable drug seizures include nearly three tons of heroin at Mundra port in

Gujarat last September, which allegedly originated from Kandahar, Afghanistan, and was trafficked through Iran. Gujarat police seized a record amount of drugs in 2021, and the trend has continued into 2022, with additional busts, such as 260 kilograms of heroin in Kandla port in April and 75 kilograms near Mundra in July. Moreover, fentanyl seizures in Pakistan rose last year, raising concerns for India, which has a substantial population of opioid users and a poorly regulated chemical and pharmaceutical industry that could supply these substances.⁵⁷

The Broader Middle East and Central Asia:

Afghan drugs bound for Europe frequently pass through Iran. In Iran's southeastern region, close to the Afghan border, authorities seized more than 100 tons of drugs in the last eight months of 2021. Large seizures have continued, including over a ton of opium and a record-breaking 1.1 tons of methamphetamine hidden in tankers from Afghanistan. Iranian officials report a rise in seizures of Afghan-origin meth and heroin. From Iran, drugs flow into Turkey, where traffickers have exploited the ongoing refugee crisis to smuggle narcotics across the border. Turkey has also reported significant drug seizures, including over a ton of liquid and crystal meth in Istanbul in May and another large haul in July.⁵⁸

Afghan meth has been flooding into Iran as a destination as well as a transit country, as well as other parts of the region. According to the United Nations Office on Drugs and Crime (UNODC), seizures of Afghan-origin drugs in the Near and Middle East rose between 2020 and 2021.⁵⁹ Iraq, long a destination for drugs smuggled from Iran, saw a surge in drug-related arrests near its eastern border in 2021, with crystal meth, making up 60 percent of the country's drug trade. The Gulf states have also been affected, with the United Arab Emirates reporting that crystal meth is among the most commonly seized drugs. Dubai saw a massive bust of over a ton of methamphetamine in April 2022, while Oman has also reported meth seizures this year.⁶⁰

In Central Asia, Afghanistan-origin drugs are trafficked through countries like Tajikistan and Kyrgyzstan, both of which have reported increased seizures. Tajikistan saw a 52 percent rise in drug seizures in the first half of 2022, with officials noting an uptick in trafficking since the Taliban's takeover.⁶¹ Kyrgyzstan intercepted around six tons of illicit drugs in the first half of 2022, marking a 60 percent increase compared to the previous year.⁶²

Sub-Saharan Africa:

Drugs from Afghanistan are also trafficked along the Southern

Route through Pakistan and Iran to Africa. Recent years have seen seizures of heroin and meth in the Arabian Sea and Indian Ocean, in route to countries like Mozambique, Tanzania, and South Africa.⁶³ In November 2021 alone, international maritime forces carried out eight separate drug interdictions along this route, seizing a record amount of heroin and three times more meth than in any previous year since 2016.⁶⁴

In early 2022, the British Royal Navy intercepted over a ton of Afghan-origin heroin, hashish, and meth in the Gulf of Oman, followed by another 90 kilograms of heroin in May. Further south, South African police seized 75 kilograms of heroin and meth in July, arresting a suspect with ties to an Afghan-based drug gang, underscoring the reach of Afghanistan's drug trade into African markets.⁶⁵

Analysis and Assessment

The Uncertain Longevity of the Opium Ban

The Taliban's return to power in Afghanistan triggered a swift economic collapse due to international sanctions, the freezing of central bank assets, and the cessation of foreign aid.

These measures left many Afghans, particularly rural farmers, with limited options for generating income, pushing them toward opium cultivation. Simultaneously, the economic crisis deprived the Taliban regime of essential resources to combat the drug trade, a problem exacerbated by the withdrawal of foreign law enforcement agencies that had supported the Republic's anti-drug efforts.

The 2022 ban on opium production has exacerbated Afghanistan's severe humanitarian crisis. Over 40% of the population faces acute food insecurity, with more than half relying on humanitarian aid. For rural farmers, the ban has been devastating, depriving them of their primary source of income and intensifying existing struggles with drought, conflict, and natural disasters. The lack of viable alternative livelihoods has made curbing the opium industry a formidable challenge, as it remains an economic lifeline for many Afghans. Furthermore, the dire consequences of this policy are compounded by the Taliban's isolation, international sanctions, and numerous governance, security, and economic challenges. As donors grapple with the dilemma of whether to support the Taliban's drug crackdown or push for better governance, some experts conclude that allowing a continued flow of drugs from Afghanistan might be the least problematic option.⁶⁶

The Taliban's prohibition on poppy cultivation raises questions about its sustainability and potential long-term effects. Experts predict significant political and economic ramifications by 2025, as the country grapples with this decision's impact. David Mansfield highlights the fear of prohibition driving up methamphetamine and opiate prices. He suggests that while the Taliban might act against meth precursors like ephedra to signal compliance with international demands, the move would likely exacerbate broader employment concerns.⁶⁷

Taban mentioned that expecting the Taliban to combat narcotics (production, processing, and trafficking) is akin to asking a wolf to guard sheep. He alleges that current changes are a tactical maneuver, aiming to release their strategic reserves of narcotics (opium and heroin) onto the market. This allows them to deplete reserves that are challenging to store long-term (beyond five years) while also driving up prices.⁶⁸ If the Taliban were to enforce a long-term ban on opium production, sustaining it would pose significant challenges. Even with robust security measures and international support for alternative livelihoods, achieving sufficient rural development to replace the income derived from poppy cultivation would require decades of consistent policies and favorable conditions.

The Taliban's Strategic Calculations

The effects of the current Taliban-imposed drug ban on Afghanistan's opium economy are fundamentally different from the prohibition implemented from 1999-2001. Comparing these two bans is misleading, given the distinct socio-economic and agricultural contexts in which they were enforced. In 2000, the ban was announced three months after the prior crop was harvested and just before the next planting season, leaving farmers little opportunity to retain their opium. At that time, poppy cultivation rarely exceeded 70,000 hectares, and opium prices were significantly low—approximately \$30 per kilogram—forcing farmers to sell their entire crop to cover household expenses. The 2022 ban, however, occurred in a vastly different landscape. Between 2013 and 2022, poppy cultivation regularly surpassed 200,000 hectares, supported by an additional 237,000 hectares of agricultural land developed in former desert areas of the south and southwest. Announced two weeks before the harvest, the 2022 ban coincided with rising opium prices and granted farmers a two-month grace period to collect their crops, enabling them to store more opium than before.⁶⁹

Therefore, the Taliban's current approach to drug policy appears more strategic, aiming to balance internal political stability

and external pressures. By driving up opium prices and consolidating control over the drug trade, the group gains significant revenue while positioning itself as willing to negotiate with the international community. Experts suggest that the Taliban may demand international recognition and development aid in exchange for enforcing a comprehensive poppy ban. Poyesh and Basharyar agreed that the Taliban may use their temporary ban on narcotics production as a tactic to seek international recognition and attract foreign aid. As stockpiles diminish, the Taliban may seek financial assistance in exchange for maintaining the ban. However, if international aid decreases and economic pressures mount, there is a significant risk that narcotics cultivation will resume. This ban is unlikely to eliminate the narcotics threat, as the Taliban may alter their strategies to maximize profits.⁷⁰⁷¹ Thus, any sustainable solution would require decades of rural development and support for alternative livelihoods.

Rising Opium Prices and Farmer Inventories

The concept of inventory is central to understanding the impact of the current ban. Unlike perishable crops, opium can be stored for years, retains its value, and is easily sold at the farm gate. Many farmers stagger their sales, keeping reserves to capitalize on potential

price increases. However, the ability to maintain these inventories depends on factors such as land size, yield, household needs, and economic shocks like healthcare expenses or weddings. Farmers with small landholdings often sell their entire crop to cover necessities. Conversely, those with larger farms or non-agricultural income sources retain significant amounts of opium, particularly when prices rise. Land ownership patterns vary significantly across Afghanistan, influencing the capacity to grow and store opium. In the mountainous areas of Nangarhar and Badakhshan, small, fragmented plots and poor soil conditions limit farmers' ability to cultivate sufficient crops or retain inventory. These regions typically lack substantial reserves.⁷²

The timing of the Taliban's April 2022 edict significantly influenced opium prices and farmer behaviors. By December 2023, the price of opium soared to over \$1,000 per kilogram. Farmers, particularly those with larger landholdings in the south and southwest, benefited immensely from this price surge, increasing their purchasing power and capital. These farmers could afford to retain much of their 2022 harvest, preparing for potential enforcement of the ban in subsequent years. The opium ban has caused a dramatic shift in the terms of trade. For example, a solar-powered irrigation system costing \$4,000 would have required 67 kilograms of opium at the 2021 price

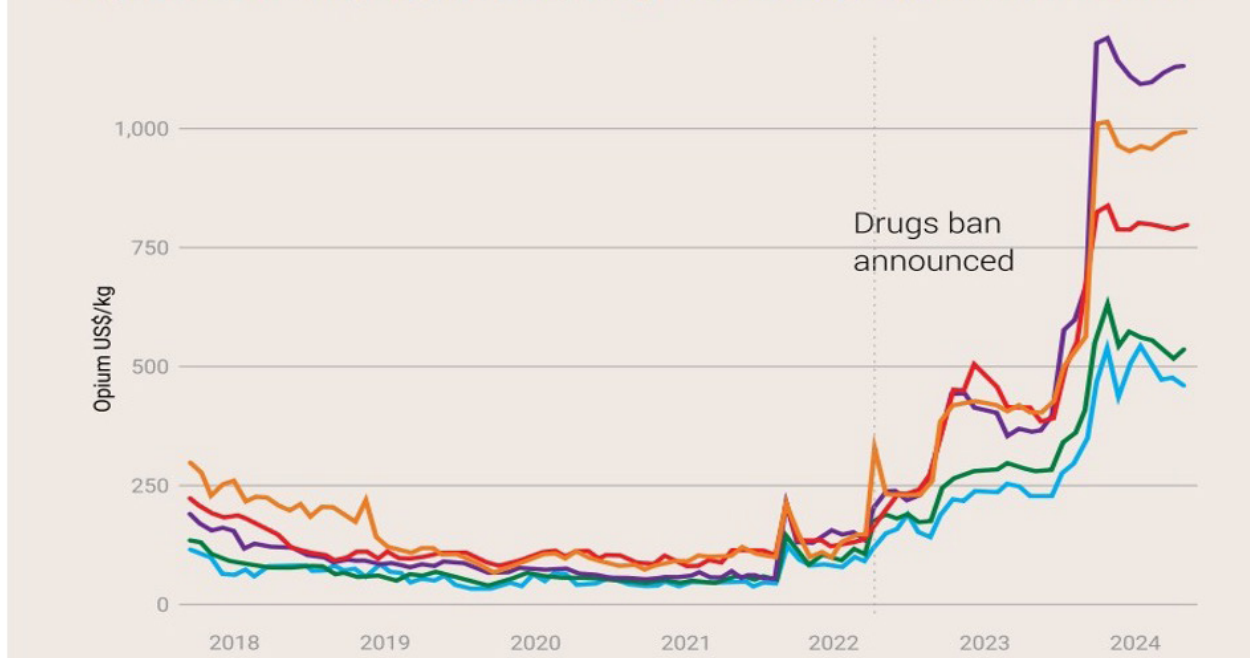
of \$60 per kilogram. By late 2023, at \$1,024 per kilogram, only four kilograms of opium were needed. This price surge has significantly improved the purchasing power of farmers with large inventories, reinforcing their support for the ban.⁷³ Furthermore, prices for dry opium, which surged to a 20-year high of \$408 per kilogram in 2023, have stabilized around \$730 per kilogram in the first half of 2024, significantly higher than the pre-ban average of \$100 per kilogram. This sharp price increase, combined with dwindling stockpiles, raises concerns that farmers may be tempted to defy the ban, particularly in areas outside traditional cultivation zones and in neighboring countries.⁷⁴

In contrast, the south and southwest regions, where larger landholdings are common due to past irrigation projects, have seen a significant expansion of agriculture into former desert lands. Farmers in these areas often dedicate around 40% of their agricultural land to poppy cultivation, supported by solar-powered deep wells for irrigation.⁷⁵ Between 2019 and 2023, nearly half of Afghanistan's poppy crop was cultivated in these desert regions, which now account for over 90,000 hectares of poppy cultivation annually. Farmers in these areas, benefiting from larger plots and higher yields, were able to retain significant opium inventories. By 2023, some estimates suggested farmers in the south and southwest held up to 13,717 metric tons of

opium, worth approximately \$203,000 per household. This explains the continued support for the ban among landed farmers in these regions, who have seen dramatic economic gains.⁷⁶

While the Taliban's heartlands benefit from the ban, areas with smaller inventories perceive it as a policy that exacerbates economic inequality.

The economic advantages of the ban are not evenly distributed. Large landowners in the south and southwest, who constitute the Taliban's core constituency, continue to benefit from high opium prices and substantial inventories. In contrast, smaller landholders and sharecroppers, particularly in provinces like Nangarhar, are struggling to cope. With limited land and dwindling opium reserves, these farmers face growing economic hardships, including reduced food quality and the sale of essential assets. The disparity between regions has political and social implications. While the Taliban's heartlands benefit from the ban, areas with smaller inventories perceive it as a policy that exacerbates economic inequality. Development efforts targeting the south and southwest

Figure 7: Monthly regional trader prices for dry opium, 2017-2024

risk further reinforcing these disparities, creating tensions between the landed elite and the land-poor.⁷⁷

Accurately quantifying opium inventories is complex. Farmers and traders are reluctant to disclose their reserves due to concerns over theft or exposure of their wealth. However, satellite imagery and crop mapping provide insights, particularly in the uniform layouts of desert farms. In these areas, farms average 4.89 hectares, with about three hectares typically dedicated to other crops. Economic analysis shows that farmers in the desert regions can meet household expenses with income from non-poppy crops, allowing them to

retain most of their opium harvests. In contrast, land-poor farmers must sell their entire yield to survive, leaving them without reserves in the face of economic shocks.⁷⁸

Current Developments in Drug Trade

Despite the ban on poppy cultivation enacted in April 2022, the Taliban has not eliminated the drug trade. Instead, they have consolidated control over it. Afghanistan's dominance in the \$55 billion global heroin trade reflects the Taliban's stronghold on the market. A notable figure in this domain, drug lord Bashir Noorzai, who was previously imprisoned

in the United States for heroin smuggling, has reportedly resumed his activities since returning to Afghanistan. While major consumer regions such as Europe, the Middle East, and South Asia have so far experienced no substantial shortages, that stability may shift if future harvests remain diminished.⁷⁹

Large stockpiles of opium and heroin remain in Afghanistan, and traffickers continue to export these at increased prices to regional countries.

According to Poyesh, under the Taliban regime over the past three years, although narcotics cultivation has decreased the drug trade has surged, with trafficking networks and mafia groups expanding significantly. Large stockpiles of opium and heroin remain in Afghanistan, and traffickers continue to export these at increased prices to regional countries. This strategy has allowed the Taliban to profit from narcotics trafficking without engaging directly in cultivation, thereby bolstering their revenue streams.⁸⁰ The United Nations Office on Drugs and Crime (UNODC) estimated that the drug trade accounted for up to 14% of Afghanistan's GDP, with opium prices soaring since the implementation of the ban. This price surge has driven

a global increase in heroin and methamphetamine seizures as producers stockpile in anticipation of shortages. Additionally, the report noted a record high in cocaine supply during 2022, though patterns of consumption varied. While usage appeared to decline in the United States, analysis revealed rising consumption levels in Europe.⁸¹

Moreover, the Taliban appears to be shifting to more profitable synthetic drug production methods, such as chemically synthesized methamphetamine, which could be their next focus due to its efficiency and profitability.⁸² Methamphetamine production will become an increasingly attractive option for the Taliban, given its low production costs, the availability of precursor chemicals, and the high profitability of the drug. The difficulty of detecting meth labs via satellite imagery further adds to its appeal, making it a viable and potentially lucrative focus for the Taliban in the years to come. This pivot aligns with a broader strategy to consolidate control over drug markets and adapt to changing economic dynamics.⁸³ According to Taban, the Taliban have recognized shifts in the international market toward synthetic drugs, and they have organized efforts to shift production and trade from traditional narcotics to synthetic drugs. Methamphetamine production in Afghanistan has significantly increased, posing a potential threat to the narcotics trade.⁸⁴

Eliminating poppy cultivation could deepen poverty for hundreds of thousands of farmers and lead to the rise of synthetic opioids, as seen in North America.

Eliminating poppy cultivation could deepen poverty for hundreds of thousands of farmers and lead to the rise of synthetic opioids, as seen in North America. Reports of tramadol-containing pills, such as “Tablet K,” already indicate a potential shift towards synthetic drug use in Afghanistan. The report also emphasized the potential for a surge in demand for treatments like methadone, buprenorphine, and slow-release morphine. However, inadequate access to these services could lead heroin users to substitute other opioids, some of which are significantly more potent and dangerous. The UNODC expressed concern about synthetic opioids such as fentanyl analogues and nitazenes, which have surfaced in Europe and could result in higher overdose rates.⁸⁵ As the Taliban navigates these complexities, some experts argue that allowing a continued flow of drugs from Afghanistan may pose fewer problems than the alternatives, particularly in light of the Taliban’s governance and economic constraints.

Recommendations

Beyond destabilizing Afghanistan, this entrenched narcotics criminal economy is a major challenge to regional stability and counter-narcotics activism globally. Thus, to tackle these interrelated problems, a coordinated international response is needed that disrupts consumer markets and the supply chains of illicit drugs, while also advancing alternative livelihoods and access to the market for Afghanistan’s legal agricultural sector.

Addressed to Taliban Regime (National-Level Strategies)

1. Enhancing Enforcement of Counter-Narcotics Laws

The Taliban should enforce existing counter-narcotics laws from the former Republic government uniformly across Afghanistan. They can strengthen legal frameworks to eliminate political protection for traffickers, ensuring high-level traffickers and small-scale actors are prosecuted. Taliban should also rigorously implement measures such as the destruction of stored narcotics and dismantling trafficking networks, supported by transparent monitoring mechanisms.

2. Developing Alternative Livelihoods and Improving Agricultural Marketing

To reduce reliance on opium poppy cultivation, Afghanistan should implement government-led programs providing technical support, seeds, and tools for high-value crops aligned with market demands. Partnering with international organizations can fund rural development projects, promote crop diversification, and train farmers in modern techniques. Strengthening trade opportunities through international fairs, regional agreements, and partnerships can expand markets for Afghan agricultural products. Additionally, investing in cold storage facilities and transportation infrastructure will enable farmers to profitably sell perishable goods, fostering a sustainable agricultural economy and broader economic stability.

3. Expanding Drug Treatment Programs

The Taliban should establish and broaden access to drug treatment centers to address Afghanistan's critical addiction problem. These centers should focus on holistic treatment plans, including mental health support and vocational training, to enable long-term recovery. By developing technical and evidence-based rehabilitation programs tailored to Afghanistan's unique context, they can address the needs of the

country's high number of addicts.

4. Raising Public Awareness

To combat the pervasive impacts of narcotics, strategic national campaigns should be launched through media and community engagement to educate Afghans on the societal, health, and economic harms caused by drug production and addiction. These efforts must be complemented by localized outreach initiatives targeting regions most affected by narcotics cultivation and substance abuse, ensuring tailored interventions that resonate with local communities. Additionally, equipping the Ministry of Agriculture with the necessary resources will enable direct engagement with farmers and communities, promoting sustainable livelihood options and reducing reliance on narcotics production as a source of income.

Addressed to Regional Countries and the International Community (Global and Regional Strategies)

1. Supporting Sustainable Livelihood Programs

Regional countries and the international community through the World Bank should invest in

small-scale rural development initiatives to address the socio-economic drivers of drug cultivation and promote sustainable livelihoods. These efforts should be focused on a few agricultural support programs that encourage the cultivation of high-value crops, such as fruits and vegetables, offering farmers better returns and economic stability to demonstrate how the funds should be spent within these programs. Small-scale livestock farming should also be promoted to enhance income generation and food security in rural communities.

2. Strengthening Regional Cooperation Mechanisms

Regional countries and the international community should revitalize platforms like the Heart of Asia-Istanbul Process to facilitate coordinated efforts among regional stakeholders in addressing narcotics challenges. Multilateral initiatives, such as the Triangular Initiative (TI) involving Afghanistan, Iran, and Pakistan, and the Central Asian Regional Information and Coordination Centre (CARICC), should be evaluated and strengthened to enhance their effectiveness in combating drug trafficking. Furthermore, regional organizations like the Shanghai Cooperation Organization (SCO) can play a critical role in adopting unified strategies and fostering collaboration to counter the production, trafficking, and consumption of narcotics. It is

important to emphasize that the Taliban should not be invited to represent Afghanistan on such platforms. The abovementioned mechanisms should be held in the Track II format to invite and discuss the Afghanistan drug issue with non-Taliban experts.

3. Strengthening Afghan Customs and Capacity Building

Regional countries and the United Nations should prioritize building the capacity of Afghan customs officials through training and technology support to enhance their ability to combat narcotics trafficking and transnational organized crimes. Joint controlled delivery operations with countries such as China, Iran, and Pakistan can effectively dismantle trafficking networks and disrupt the flow of illicit drugs. Establishing a regional Counter-Narcotics Research Center would further facilitate information sharing, operational coordination, and strategy development among stakeholders.

Additionally, finalizing and implementing operational mechanisms with key partners such as Pakistan, Russia, and India with the coordination of the United Nations Office for Drugs and Crime (UNODC) will solidify collaborative efforts and enhance regional coordination to address the narcotics trade comprehensively.

4. Addressing Demand in Consumer Countries

Regional countries and the international community should launch global public awareness campaigns to highlight the devastating impact of Afghan opium, aiming to reduce demand in consumer countries. These efforts should be paired with collaboration with public health systems in major consumer regions to improve addiction treatment programs. By addressing the demand side of the narcotics trade, these initiatives can reduce global dependency on Afghan opium and complement efforts to curb its production, fostering a more comprehensive approach to combating the narcotics crisis.

5. Restricting Narcotics Trafficking Routes and Combating Trafficking of Precursors

Regional countries and the international community should collaborate with transit countries to dismantle trafficking networks and reduce cross-border narcotics flows. Facilitating data-sharing agreements among regional stakeholders is crucial for tracking production, trafficking, and consumption patterns, enabling more targeted interventions. Mechanisms must also be developed to monitor and prevent the trafficking of precursors, such as acetic anhydride, which are essential

for heroin production.

Strengthening oversight and imposing sanctions on countries and companies involved in the illegal production and export of precursor chemicals is necessary to disrupt these supply chains. International cooperation should be encouraged to block the illicit flow of precursors into Afghanistan, ensuring a comprehensive approach to countering the narcotics trade and its enabling mechanisms.

6. Promoting Accountability and Transparency

To ensure transparency and effectiveness in counter-narcotics efforts, regional countries and the international community should distribute aid through independent organizations, minimizing the risk of misuse and fostering accountability. Mandating evidence-based evaluations by international bodies such as the UNODC will provide critical insights into the impact and efficiency of counter-narcotics programs, enabling continuous improvement. Additionally, conducting on-ground surveys and engaging directly with local farmers will help collect reliable data and assess the real outcomes of interventions, ensuring that programs address the root causes of drug cultivation and meet the needs of affected communities effectively.

Conclusion

Afghanistan's narcotics trade represents one of the most complex and persistent challenges for the country, its neighbors, and the global community. The Taliban's April 2022 ban on opium cultivation, while dramatic in its impact, underscores the deeply entrenched nature of this issue. By slashing cultivation levels by 95% within a year, the Taliban demonstrated their capacity for enforcement, but the economic and social consequences have been severe. Farmers, particularly those with limited landholdings, have been pushed further into poverty, while wealthier landowners with stockpiled reserves have benefitted from soaring opium prices. Meanwhile, trafficking networks have diversified into synthetic drugs like methamphetamine, sustaining Afghanistan's role as a global narcotics hub.⁸⁶

The political implications of the ban are profound. Rural communities, alienated by the loss of their primary income source, are increasingly discontented, raising the potential for unrest and resistance. Within the Taliban itself, factions reliant on the opium trade for funding may challenge the leadership's authority, jeopardizing the regime's cohesion. The ban also risks exacerbating Afghanistan's broader economic crisis, with limited international aid, frozen assets, and ongoing sanctions

leaving the Taliban with few viable options for revenue generation.

Afghanistan's opium economy has historically fueled heroin markets in Europe and Asia, while its trafficking routes have contributed to instability in neighboring countries.

At the regional and global levels, the implications are equally significant. Afghanistan's opium economy has historically fueled heroin markets in Europe and Asia, while its trafficking routes have contributed to instability in neighboring countries. Although the ban has temporarily disrupted supply chains, existing stockpiles, the existence of other opium cultivation nations such as Myanmar, and the rise of synthetic drugs suggest that the broader drug trade remains robust. Addressing these challenges requires a concerted international response that integrates law enforcement, rural development, and demand reduction strategies.

The sustainability of the Taliban's opium ban hinges on addressing the economic drivers of cultivation, providing viable alternatives for rural communities,

and fostering a coordinated global response to the narcotics trade. The stakes are high: failing to act risks deepening Afghanistan's humanitarian crisis, destabilizing the region, and perpetuating global drug markets. Conversely, implementing the proposed recommendations offers an opportunity to break the cycle of dependency on narcotics and pave the way for a more stable and prosperous Afghanistan. Achieving this vision will require long-term commitment, international cooperation, and innovative solutions to one of the world's most intractable challenges. 🌐

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