

SUPPLY OF OPIATE RAW MATERIALS AND DEMAND FOR OPIATES FOR MEDICAL AND SCIENTIFIC PURPOSES

Introduction

1. The International Narcotics Control Board (INCB), in fulfilment of the functions assigned to it under the Single Convention on Narcotic Drugs of 1961¹ and the relevant resolutions of the Economic and Social Council and the Commission on Narcotic Drugs, regularly examines issues affecting the supply of and the demand for opiates for licit requirements, and endeavours to ensure a standing balance between that supply and demand. The present section contains an analysis of the current situation based on the data provided by Governments.²

2. The analysis presented below has been prepared by examining the data on opiate raw materials and on opiates manufactured from those raw materials. In the analysis, raw materials rich in morphine and the opiates derived from them are, in accordance with the methodology adopted by INCB, considered separately from raw materials rich in thebaine and the opiates derived from them. Global supply of opiate raw materials is measured by the levels of stocks and production. Global demand for opiate raw materials is assessed on the basis of data on total utilization of opiate raw materials for the manufacture of all opiates (see para. 20 below). Data concerning total consumption and stocks of opiates are also included, as appropriate.

3. The present analysis complements the comments on the reported statistics for individual opiate raw materials obtained from opium poppy (opium, poppy straw and concentrate of poppy straw) and for the opiates obtained from them; readers are invited to turn to those comments for more in-depth information on long-term developments concerning the individual substances (see pages 21-42 above). The main focus of the analysis is on the present situation and on the last four years for which statistical data are available. For 2013 and 2014, the data on production are based on advance statistical information and estimates received from the main producing countries,³ while the data on the demand for opiate raw materials and the opiates derived from them are INCB projections based on past trends and taking into account relevant estimates furnished by Governments.

4. Finally, in this section INCB examines the trends in global consumption of all opiates and synthetic opioids over the 20-year period from 1993 to 2012. The findings derived from the analysis complement the comments on reported statistics on individual substances and reflect the changes over time in the relative importance of opiates, which are derived from opium poppy, in the global consumption of opioids.

Supply of opiate raw materials

Cultivation of opium poppy for the extraction of alkaloids

5. Table 1 provides information on the area cultivated with opium poppy (*Papaver somniferum*) for the extraction of alkaloids in the main producer countries; data on varieties rich in morphine and those rich in thebaine are listed separately, where applicable. For both types of raw materials, the estimated area of cultivation is given for each year. Data on the area sown and the area actually harvested are given for the years for which such data are available.

6. In 2012, the area sown with opium poppy rich in morphine in major producing countries decreased slightly from the levels of the previous year in Australia, France, India, Spain and Turkey, but increased in Hungary. In 2012, the biggest decrease in the total sown was in Turkey, where it decreased 39 per cent from the level of the previous year. In Turkey, the actual area harvested decreased by 75 per cent from the area of the previous year, while in Hungary the area harvested decreased by 35 per cent; in India by 27 per cent, in Australia by 24 per cent and in Spain by 8 per cent. India is the only opium-producing country included in the present analysis. The total area sown in major producing countries was 67 per cent of the total estimated area.

7. In 2012, cultivation of opium poppy rich in thebaine increased considerably in France and Spain and decreased in Australia and Hungary (decreases of 11 per cent and 41 per cent, respectively, in the area actually harvested). Hungary had previously cultivated small areas of opium poppy rich in thebaine from 2005 to 2007, with the area actually harvested always less than 20 hectares. After a cessation in cultivation of poppy straw rich in thebaine following 2007, Hungary resumed cultivation in 2011, with about 1,532 hectares being harvested. The total cultivation in Hungary in 2012 decreased to 911 hectares.

¹United Nations, *Treaty Series*, vol. 520, No. 7515.

²The analysis excludes data on China and the Democratic Republic of Korea, which produce opiate raw materials solely for domestic use. It also excludes data on the utilization of seized opium that was released for licit use in the Islamic Republic of Iran and on the demand for opiates derived from such opium.

³Those data have been adjusted, as necessary, to reflect industrially recoverable alkaloid content in the raw materials in question.

Table 1. Area cultivated with opium poppy rich in morphine and opium poppy rich in thebaine, 2009-2014
(Estimated area, as confirmed by the International Narcotics Control Board, area sown and area harvested, in hectares)

	2009	2010	2011	2012	2013 ^a	2014 ^b
Australia						
Opium poppy rich in morphine						
Estimated area	10 506	12 770 ^c	14 050 ^c	15 960 ^c	11 100 ^c	12 210
Area sown	5 447	10 462 ^c	11 832 ^c	11 194 ^c	11 978 ^c	..
Actual area harvested	4 598	9 127 ^c	10 973 ^c	8 352	11 484 ^c	..
Opium poppy rich in thebaine						
Estimated area	11 857	11 650	13 580	12 390	12 000	15 420
Area sown	10 439	11 441	13 165	12 191	16 164	..
Actual area harvested	8 894	10 922	13 024	11 559	15 400	..
Opium poppy rich in morphine and thebaine						
Total estimated area	22 363	24 420^c	27 630^c	28 350^c	23 100	27 630
Total area sown	15 886	22 122^c	24 997^c	23 385^c	28 142	..
Total actual area harvested	13 492	20 049^c	23 997^c	19 911^c	26 884	..
France						
Opium poppy rich in morphine						
Estimated area	7 500	8 000	8 978	11 000	11 000	10 300
Area sown	6 837	9 800	9 370	8 960	10 625	..
Actual area harvested	6 750	9 400	8 592	8 680	10 267	..
Opium poppy rich in thebaine						
Estimated area	2 500	5 000	3 922	2 000	2 000	1 700
Area sown	3 002	700	930	1 210	900	..
Actual area harvested	2 990	700	110	1 190	741	..
Opium poppy rich in morphine and thebaine						
Total estimated area	10 000	13 000	12 900	13 000	13 000	12 000
Total area sown	9 839	10 500	10 300	10 170	11 525	..
Total actual area harvested	9 740	10 100	8 702	9 870	11 008	..
Hungary						
Opium poppy rich in morphine						
Estimated area	15 500	8 000	7 000	9 500	11 800	7 500
Area sown	8 204	11 289	7 972	10 005	7 008	..
Actual area harvested	1 114	7 308	6 025	3 929	2 600	..
Opium poppy rich in thebaine						
Estimated area	—	3 000	3 720	3 000	5 100	6 000
Area sown	—	—	2 399	3 351	3 252	..
Actual area harvested	—	—	1 532	911	1 300	..
Opium poppy rich in morphine and thebaine						
Total estimated area	15 500	11 000	10 720	12 500	16 900	13 500
Total area sown	8 204	11 289	10 371	13 356	10 260	..
Total actual area harvested	1 114	7 308	7 557	4 840	3 900	..
India						
Opium poppy rich in morphine						
Total estimated area	11 262	22 000	22 000	21 220	5 240	10 000
Total area sown	11 020	15 851	17 262	16 021	5 794	..
Total actual area harvested	8 853	12 237	16 518	12 092	5 619	..

Table 1. (continued)

	2009	2010	2011	2012	2013 ^a	2014 ^b
Spain						
Opium poppy rich in morphine						
Estimated area	6 590	7 000	8 500	10 000	10 100	11 750
Area sown	7 000	8 383	9 771	8 762	9 545	..
Actual area harvested	6 865	6 439	9 488	8 762	8 762	..
Opium poppy rich in thebaine						
Estimated area	4 410	5 000	5 500	2 000	3 800	4 500
Area sown	5 000	3 529	186	3 572	4 455	..
Actual area harvested	4 925	3 528	186	3 572	3 572	..
Opium poppy rich in morphine and thebaine						
Total estimated area	11 000	12 000	14 000	12 000	13 900	16 250
Total area sown	12 000	11 912	9 957	12 334	14 000	..
Total actual area harvested	11 790	9 967	9 674	12 334	12 334	..
Turkey						
Opium poppy rich in morphine						
Total estimated area^d	70 000	70 000	70 000	70 000	70 000	70 000
Total area sown	60 328	55 296	61 368	37 252	37 117	..
Total actual area harvested	48 893	51 987	54 911	13 511	32 277	..

Note: A field shaded in red signifies that the corresponding total estimated area for both opium poppy rich in morphine and opium poppy rich in thebaine has been exceeded. Two dots (..) indicate that data are not available. Figures not based on official reports (form B and form C) are in blue font.

^aFigures for area sown and actual area harvested in 2013 are based on advance data submitted by Governments to the International Narcotics Control Board.

^bFigures for 2014 are based on estimates submitted by Governments to the Board.

^cFigures for the area cultivated with morphine-rich opium poppy in Australia from 2011 to 2014 include cultivation of an opium poppy variety rich in codeine. In 2010, it was estimated that 800 hectares would be cultivated; in fact, 612 hectares were sown and 580 hectares were harvested. In 2012, it was estimated that 490 hectares would be cultivated; in fact, 2,029 hectares were sown and 1,927 hectares were harvested. The estimate for cultivation in 2013 is 2,100 hectares and the estimate for cultivation in 2014 is 2,960 hectares. For France, the estimate for the cultivation of opium poppy rich in codeine in 2014 is 2,000 hectares.

^dEstimate referring to the maximum area available for cultivation.

8. The advance data for 2013 project a return to the level of 2011 in the actual area of opium poppy rich in morphine harvested in major producing countries for which advance data were available. This was due largely to a 138 per cent increase in the area harvested in Turkey, which had harvested the greatest area of any country in 2012. The area actually harvested decreased in Hungary and India and increased in Australia, France and Turkey. It is expected to stay at the same level in Spain. Cultivation of opium poppy rich in thebaine measured in terms of area harvested increased in Australia and Hungary and decreased in France. In Spain, the area harvested stayed at the same level of 3,572 hectares in 2012 and 2013. However those 3,572 hectares of actual area harvested in Spain represented an increase from the 186 hectares harvested in 2011.

9. For 2014, estimates for cultivation of opium poppy rich in morphine will increase relative to 2013 in Australia and India and will decrease in France and Hungary. With regard to the cultivation of opium poppy rich in thebaine, all major producing countries estimate increases in the area to

be used for the cultivation of that variety of opium poppy, except France, where the estimates for 2014 are almost the same as the expected actual area harvested in 2013.

Production of opiate raw materials

10. Tables 2 and 3 provide an overview of global production of and demand for morphine-rich and thebaine-rich opiate raw materials, respectively, for the period 2009-2014. The total production of morphine-rich opiate raw materials in the main producing countries decreased to 477 tons⁴ in morphine equivalent in 2012. Production declined each year from 2004 to 2008, but rose each year from 2009 to 2011. In 2012 the production dropped back to its 2010 level of 477 tons. Turkey was the largest producer in 2011. A planned, sharp one-year decrease in production in

⁴The analysis is based predominantly on raw materials obtained from opium poppy rich in morphine but includes the morphine alkaloid contained in opium poppy rich in thebaine whenever appropriate.

Table 2. Opiate raw materials rich in morphine: production, demand, balance between the two^a and stocks, in tons of morphine equivalent, 2009-2014

	2009	2010	2011	2012	2013 ^b	2014 ^c
Australia						
Production	60	97	113	174	184	220
France						
Production	84	89	71	92	131	145
Hungary						
Production	5	18	13	9	27	20
India						
Production	45	63	87	83	32	51
Spain						
Production	70	47	73	83	116	143
Turkey						
Production	134	140	164	14	65	108
Other countries						
Production	30	25	20	22	38	22
(1) Total production	428	479	541	477	593	709
Demand for						
Opium	54	49	59	59	60	70
Poppy straw and concentrate of poppy straw	332	352	354	397	420	440
(2) Total demand for opiate raw materials	386	401	413	456	480	510
(3) Total demand for opiates for medical and scientific purposes^d	379	378	391	415	430	445
Balance (1) minus (2)	42	78	128	21	113	199
Balance (1) minus (3)	49	101	150	62	163	264
Stocks of						
Opium	74	78	113	132	..	..
Poppy straw	257	266	285	241	..	..
Concentrate of poppy straw	79	74	95	110	..	..
Total stocks of opiate raw materials	410	418	493	483	596	795
Total stocks of all opiates	370	378	369	428	..	..

Note: Two dots (..) indicate that data are not available.

^aFor more information about the balance between supply (stocks and production) of and demand for opiate raw materials rich in morphine, see para. 25.

^bFigures for 2013 are based on advance data submitted by Governments to the Board.

^cFigures for 2014 are based on estimates submitted by Governments to the Board.

^dExcluding demand for substances not controlled under the 1961 Convention as amended by the 1972 Protocol.

Turkey for 2012 was offset by increases in production in other producing countries. Total production in Turkey dropped from 164 tons in 2011 to 14 tons in 2012, a 91 per cent decrease. Australia became the largest producer in 2012, with 174 tons, accounting for 29 per cent of global production in terms of morphine equivalent.

11. Global production of opiate raw materials rich in morphine is expected to be about 593 tons in morphine equivalent in 2013 (see table 2). Of that amount, poppy straw will account for 561 tons (95 per cent) and opium will account for 32 tons (5 per cent). The main producers

in 2013 will be Australia (31 per cent of total production), France (22 per cent), Spain (20 per cent), Turkey (11 per cent) and India (5 per cent). Those five countries together are thus expected to account for about 89 per cent of global production of opiate raw materials rich in morphine in 2013.

12. According to the information submitted by the Governments of the main producing countries, it is estimated that global production of opiate raw materials rich in morphine will increase to 709 tons in morphine equivalent in 2014, mainly as a result of a return to previous levels of

production in Turkey and planned increases in production in Australia, France and Spain.

13. Global production of opiate raw materials rich in thebaine increased continuously from 2010 to 2012, to 288 tons⁵ in thebaine equivalent (see table 3). It is expected

⁵The analysis is based predominantly on raw materials obtained from opium poppy rich in thebaine but includes the thebaine alkaloid contained in opium poppy rich in morphine whenever appropriate.

that global production in 2014 (417 tons) will be almost twice what it was in 2010 (212 tons). In 2012, Australia accounted for 80 per cent of the global total, Spain for 11 per cent, France for 5 per cent, India for 3 per cent and Hungary 1 per cent. Production stayed at about the same level in Australia, at 231 tons. Spain increased its production from 22 tons in 2011 to 31 tons in 2012. Production recovered slightly in France, following a sharp fall from 2009 (30 tons) to 2010 (2 tons); production in France in 2012 was 14 tons.

Table 3. Opiate raw materials rich in thebaine: production, demand, balance between the two^a and stocks, in tons of thebaine equivalent, 2009-2014

	2009	2010	2011	2012	2013 ^b	2014 ^c
Australia						
Production	142	156	230	231	268	311
France^d						
Production	30	2	10	14	15	29
Hungary						
Production	1	0	3	3	3	10
Spain^d						
Production	63	47	22	31	58	61
India						
Thebaine extracted from opium	4	6	9	8	3	5
Other countries						
Thebaine extracted from poppy straw (M)	1	1	1	1	1	1
(1) Total production	241	212	275	288	348	417
Demand for						
Opium	6	5	6	6	7	8
Poppy straw and concentrate of poppy straw	172	195	220	255	280	300
(2) Total demand for opiate raw materials	178	200	226	261	287	308
(3) Total demand for opiates for medical and scientific purposes^e	100	96	107	124	130	140
Balance (1) minus (2)	63	12	49	27	61	109
Balance (1) minus (3)	141	116	168	164	218	277
Stocks						
Opium	8	8	11	13	..	..
Poppy straw	118	88	85	81	..	..
Concentrate of poppy straw	44	82	83	89	..	..
Total stocks of opiate raw materials	170	178	179	183	244	353
Total stocks of all opiates	157	172	196	225	..	..

Note: Two dots (..) indicate that data are not available.

^aFor more information about the balance between supply (stocks and production) of and demand for opiate raw materials rich in thebaine, see para. 26.

^bFigures for 2013 are based on advance data submitted by Governments to the Board.

^cFigures for 2014 are based on estimates submitted by Governments to the Board.

^dIn France and Spain, large quantities of thebaine alkaloid are extracted from poppy straw rich in morphine in addition to those derived from poppy straw rich in thebaine.

^eExcluding demand for substances not covered by the 1961 Convention as amended by the 1972 Protocol.

14. Global production of opiate raw materials rich in thebaine is expected to increase to about 348 tons in thebaine equivalent in 2013, owing to a planned increase in production in Australia and Spain (total production of about 268 and 58 tons in 2013, respectively). Production is also expected to increase by 6 tons in France. Australia, France and Spain are expected to account for about 98 per cent of the global production of opiate raw materials rich in thebaine in 2013.

15. Production of thebaine-rich materials in 2014 is expected to increase further, reaching about 417 tons. This will be due mainly to an increase in production in Australia and a return to previous levels of production in Spain and France. As in previous years, the actual production of opiate raw materials in 2014 may differ considerably from the estimates, depending on weather and other conditions.

Global stocks of opiate raw materials and of opiates derived from them

16. As shown in table 2, stocks of opiate raw materials rich in morphine (poppy straw, concentrate of poppy straw and opium) amounted to about 483 tons in morphine equivalent at the end of 2012. Those stocks were sufficient to cover 12 months of expected global demand at the 2013 level of demand. In 2012, Turkey continued to be the country with the largest stocks of opiate raw materials (107 tons in morphine equivalent, in the form of poppy straw and concentrate of poppy straw), followed by India (104 tons in morphine equivalent, in the form of opium), Spain (71 tons), France (67 tons), the United States of America (50 tons) and Australia (39 tons). Those six countries together accounted for 91 per cent of global stocks of opiate raw materials rich in morphine. The remaining stocks were held in other producing countries and in countries importing opiate raw materials.

17. Stocks of opiate raw materials rich in thebaine (poppy straw, concentrate of poppy straw and opium) increased to about 183 tons in thebaine equivalent by the end of 2012. Those stocks are sufficient to cover the expected global demand in 2013 for about eight months (see table 3). The United Kingdom Of Great Britain and Northern Ireland and the United States accounted for about 64 per cent of the world total in 2012, while the countries importing those raw materials held the remaining stocks.

18. Global stocks of opiates based on morphine, mainly in the form of codeine and morphine, held at the end of 2012 (428 tons in morphine equivalent) were sufficient to cover global demand for those opiates for 12 months, even without additional opiates being manufactured from opiate raw materials. On the basis of data reported by Governments, total stocks of both opiates and opiate raw materials are fully sufficient to cover demand for opiates.

19. Global stocks of opiates based on thebaine (oxycodone, thebaine and a small quantity of oxymorphone) have increased significantly in recent years, although with fluctuations. At the end of 2012, those stocks stood at 225 tons in thebaine equivalent and were sufficient to cover global demand for such opiates for about 21 months.

Demand for opiates

20. As described below, INCB measures demand for opiates in two ways: (a) in terms of the utilization of opiate raw materials, in order to reflect the demand by manufacturers, and (b) in terms of global consumption of all opiates controlled under the 1961 Convention.⁶

Demand for opiate raw materials by manufacturers measured as utilization of raw materials

21. Global demand by manufacturers for opiate raw materials rich in morphine has increased, with fluctuations of an average of about 2 per cent per year since 2000, reaching 456 tons in morphine equivalent in 2012. In 2013 and 2014, global demand for opiate raw materials rich in morphine is expected to increase again: it is anticipated to be about 480 tons in 2013 and about 510 tons in 2014.

22. Global demand by manufacturers for opiate raw materials rich in thebaine has also been increasing in recent years, albeit also with fluctuations. In 2012, total demand increased again to 261 tons of thebaine equivalent. Global demand for raw materials rich in thebaine is expected to rise to about 287 tons of thebaine equivalent in 2013 and reach 308 tons in 2014.

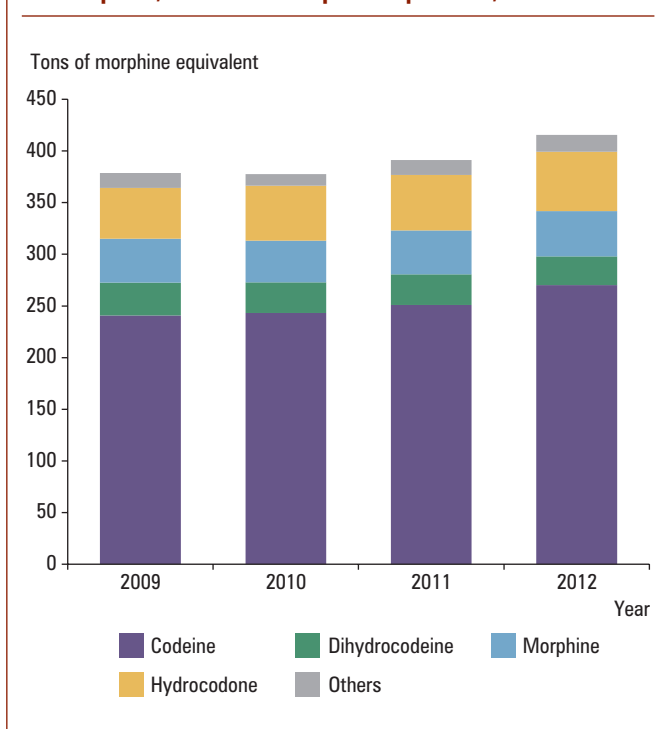
Demand for opiates measured as consumption

23. Figure I presents a breakdown of the demand in terms of consumption for morphine-based opiates, expressed in morphine equivalent, for the main narcotic drugs. Global demand for morphine-based opiates has continued to

⁶Prior to 2003, INCB measured the global demand only by global consumption of major opiates controlled under the 1961 Convention, expressed in morphine equivalent. However, by using that approximation the following were excluded: (a) demand for less commonly used narcotic drugs; (b) demand for substances that are not controlled under the 1961 Convention but are manufactured from opiate raw materials and for the consumption of which data are not available to INCB; and (c) fluctuations in the utilization of raw materials owing to developments in the market anticipated by the manufacturers, such as expectations of sales of opiates, expected changes in prices of raw materials or opiates and so on.

increase, with some fluctuations. In 2012, global demand for morphine-based opiates used for medical and scientific purposes amounted to 415 tons. That demand is expected to increase moderately, and as a result, global demand for opiates based on morphine may reach 430 tons in 2013.

Figure I. Consumption of opiates manufactured from morphine, in tons of morphine equivalent, 2009-2012



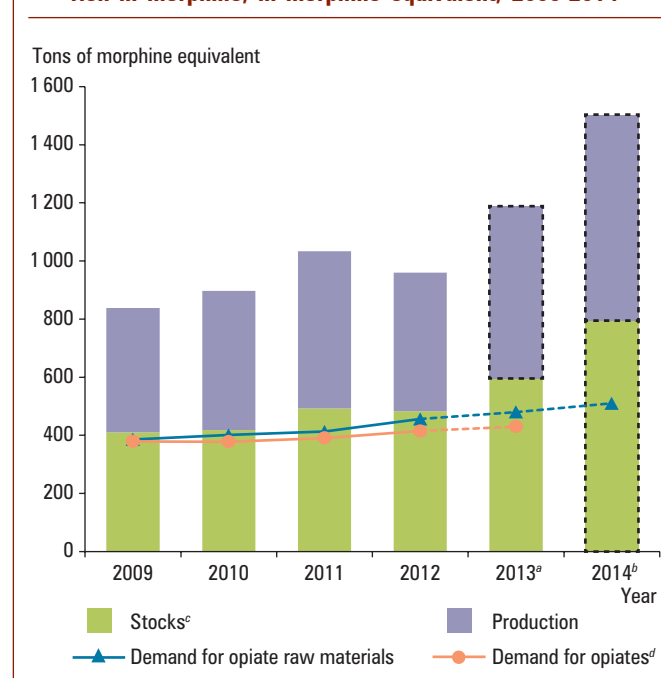
24. Demand for thebaine-based opiates, which is concentrated mainly in the United States and which has increased sharply since the late 1990s, increased in 2012 to 124 tons. It is likely to rise in future years, partly because the consumption of such opiates is expected to spread to other countries. Global demand is anticipated to reach approximately 130 tons of thebaine equivalent in 2013 and 140 tons in 2014.

Balance between the supply of and demand for opiate raw materials

25. While global production of opiate raw materials rich in morphine was lower than global demand for those raw materials in the period 2006-2008, production exceeded demand from 2009 to 2011. As a result, stocks increased and at the end of 2011 stood at about 493 tons, sufficient to cover the expected global demand for 14 months. In 2012, stocks remained at approximately the same level (483 tons) as a result of production exceeding demand, though the gap between the two was considerably reduced in comparison to 2011; stocks were still sufficient to cover

the expected global demand for about 12 months (see figure II).⁷ In 2013, global production of opiate raw materials rich in morphine is expected to exceed global demand again, with the result that global stocks of those raw materials will further increase in 2013. Stocks were expected to reach 596 tons by the end of 2013, which is equivalent to about 15 months of expected global demand at the 2014 level of demand (although not all data for a complete forecast are available). For 2014, producing countries plan to increase production. Stocks are anticipated to reach about 795 tons at the end of 2014, sufficient to cover several months of expected global demand. The global supply of opiate raw materials rich in morphine (stocks and production) will remain fully sufficient to cover global demand.

Figure II. Supply of and demand for opiate raw materials rich in morphine, in morphine equivalent, 2009-2014



^aData for production and demand for 2013 are based on advance data (dotted line) submitted by Governments.

^bData for 2014 are based on estimates (dotted line) submitted by Governments.

^cStocks as at 1 January of each year.

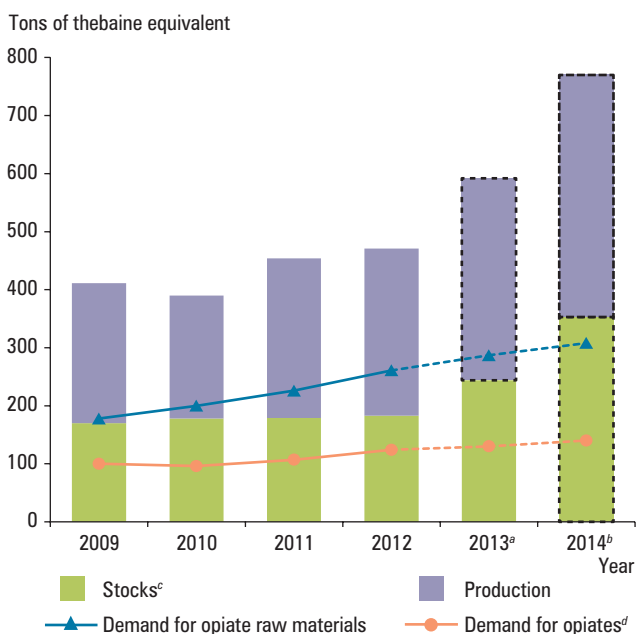
^dExcluding substances not covered by the Single Convention on Narcotic Drugs of 1961 as amended by the 1972 Protocol.

26. In 2012, global production of opiate raw materials rich in thebaine was again higher than demand, leading to a slight increase in stocks (to 183 tons) at the end of 2012, equivalent to global demand for 8 months (see figure III). Production is expected to increase in 2013 and to grow further in 2014. By the end of 2013, global stocks of opiate raw materials rich in thebaine will likely reach 244 tons, sufficient to cover global demand for

⁷Because of a change in format, figures II and III are not directly comparable with the figures that appeared as figures II and III in editions of this technical publication before 2008.

10 months, and at the end of 2014 reach 353 tons, sufficient to cover global demand for several months of expected global demand. The global supply of opiate raw materials rich in thebaine (stocks and production) will be more than sufficient to cover global demand in 2013 and 2014.

Figure III. Supply of and demand for opiate raw materials rich in thebaine, in tons of thebaine equivalent, 2009-2014



^aData for production and demand for 2013 are based on advance data (dotted line) submitted by Governments.

^bData for 2014 are based on estimates (dotted line) submitted by Governments.

^cStocks as at 1 January of each year.

^dExcluding substances not covered by the Single Convention on Narcotic Drugs of 1961 as amended by the 1972 Protocol.

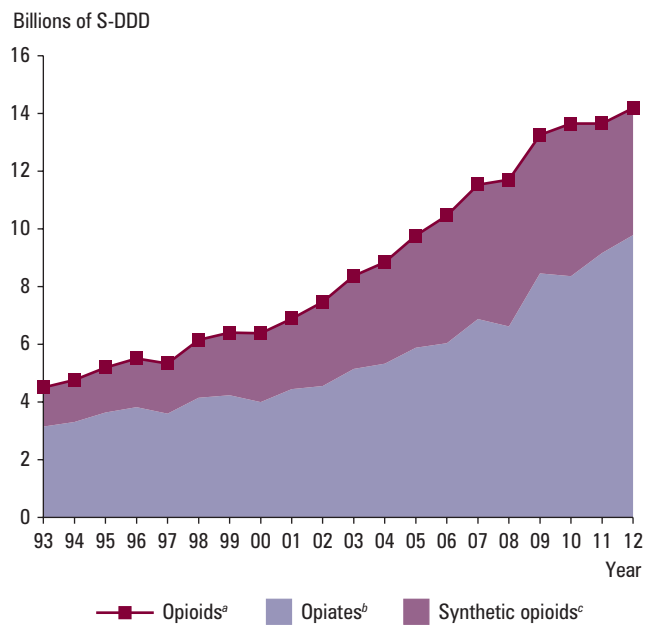
Trends in consumption levels of opioids

27. Figure IV presents the global consumption levels of opiates and synthetic opioids over the 20-year period from 1993 to 2012. The figure reflects data including buprenorphine and pentazocine, which are opioids controlled under the Convention on Psychotropic Substances of 1971.⁸ To allow the aggregation of consumption data for substances having different potencies, the con-

⁸United Nations, *Treaty Series*, vol. 1019, No. 14956.

sumption levels are expressed in billions of defined daily doses for statistical purposes.⁹

Figure IV. Global consumption of opioids,^a expressed in billions of defined daily doses for statistical purposes (S-DDD), 1993-2012



^aOpioids: opiates and synthetic opioids.

^bIncluding buprenorphine, an opiate controlled under the Convention on Psychotropic Substances of 1971.

^cIncluding pentazocine, a synthetic opioid controlled under the Convention on Psychotropic Substances of 1971.

28. The global consumption of opioids more than tripled during the period under consideration. The share of consumption of opiates in the total consumption of opioids declined from 70 per cent in 1993 to 57 per cent in 2008 but rose again to 70 per cent in 2012. As a result, the share of synthetic opioids, which are used for the same indications as opiates, increased from 29 per cent in 1992 to 43 per cent in 2008 but declined to 34 per cent in 2012. Throughout the period, the supply of opiate raw materials from which opiates were obtained was sufficient to cover the increasing demand. It is expected that the demand for opiates will increase again in the future, while their share of the total consumption of opioids may decline, owing to the expected faster growth in the consumption of synthetic opioids.

⁹See the explanatory notes to tables XIV.1-XIV.3 for an explanation of defined daily doses for statistical purposes and for the method used to calculate those consumption levels; see also table XIV.3 for further details on developments in consumption levels.