

**Economic and Social Council**

Distr.: General
20 January 2003

Original: English

Commission on Narcotic Drugs

Forty-sixth session

Vienna, 8-17 April 2003

Item 5 (a) of the provisional agenda*

**Illicit drug traffic and supply: world situation with regard
to drug trafficking and action taken by the subsidiary
bodies of the Commission**

World situation with regard to illicit drug trafficking**Report of the Secretariat***Summary*

The present report provides an overview of global trends and patterns in illicit drug production and trafficking in the period 2001-2002.

The global production of opium fell significantly in 2001 owing to events in Afghanistan, where opium poppy cultivation was drastically reduced; however, such production rose again in 2002. Global seizures of opiates, which were assessed up to 2001, showed declining trends, possibly due to a low level of production in 2001. However, while opium and morphine seizures, most of which were made in south-West Asia, decreased significantly, global heroin seizures were less affected by that decreasing trend. One explanation may be that heroin was released from stockpiles during the year of low opium production. Another explanation could be that the available heroin was increasingly diluted in response to shortages of the drug, impacting upon purity and price levels. Opiate prices increased significantly in South-West Asia in 2001, while in Europe, heroin prices remained stable, but purity levels decreased. Fewer changes were noted in East and South-East Asia.

* E/CN.7/2003/1.



Cocaine production remained stable in 2002. Seizures of cocaine in 2001 also remained stable in North America, while in the same reporting period there was a significant decrease in South America. In Western Europe, cocaine seizures increased, breaking a steady trend of recent years. Overall, cocaine prices remained stable but purity levels appear to have declined in the Americas and Europe.

Stable trends were recorded in trafficking in methamphetamine in North America and amphetamine in Western Europe. In East and South-East Asia, methamphetamine seizures decreased in 2001. That reversed the trend of increasing seizures in 1999 and 2000 that was mainly due to large seizures being made in China. Global seizures of Ecstasy-type substances decreased in 2001, after having increased significantly for several years.

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I. Introduction

1. The present report provides an overview of the latest trends in illicit drug production and trafficking at the regional and global levels and summarizes information received from Governments and other sources. The statistics and analyses are presented by drug type and provide an overview of trends in the illicit cultivation and production of cannabis, opium and coca leaf, trends in trafficking in cannabis, opiates and cocaine and the illicit manufacture of and trafficking in synthetic drugs, mainly amphetamine-type stimulants (ATS).

2. The primary source of information used for the statistics and analyses presented in the present document is the annual reports questionnaire, part III (Illicit supply of drugs), submitted by Governments to the United Nations International Drug Control Programme (UNDCP). Particular focus is given to the annual reports questionnaires for 2001, the latest reporting year. For 2001, a total of 117 questionnaires were received by 19 December 2002. However, a number of States that are of particular relevance for identifying trafficking trends continued to return questionnaires very late; some of those States had not yet returned questionnaires at the time of preparation of the present report.

3. In order to identify drug trafficking trends, information has also been drawn from reports on individual cases involving significant drug seizures, which are submitted by Governments to UNDCP pursuant to article 18, subparagraph 1 (c), of the Single Convention on Narcotic Drugs of 1961 as amended by the 1972 Protocol¹ and article 16, paragraph 3, of the Convention on Psychotropic Substances of 1971.² Approximately 30 States are regularly reporting significant seizures, mostly on a quarterly basis. In 2001, a total of 7,648 seizure cases were reported to UNDCP; approximately 4,500 seizure cases were reported by 19 December 2002 for the first three quarters of the year. The reporting of significant drug seizures is of particular importance as it enables a timely and detailed analysis of drug trafficking patterns and trends to be made.

4. The analysis of significant drug seizure data benefited from the cooperation mechanism established among the International Criminal Police Organization (Interpol), the Customs Cooperation Council (also called the World Customs Organization) and UNDCP. The three organizations exchange drug seizure data on a quarterly basis.

5. Finally, other government reports received by UNDCP and country reports as submitted to the Subcommission on Illicit Drug Traffic and Related Matters in the Near and Middle East or meetings of heads of national drug law enforcement agencies have been used as a source of information.

6. In the absence of replies to the annual reports questionnaires or other government information or in cases where insufficient information was provided in the questionnaires, the following supplementary sources have been used: Interpol; World Customs Organization; International Narcotics Control Board; and Inter-American Drug Abuse Control Commission (CICAD) of the Organization of American States.

7. It needs to be emphasized that statistics and data on illicit drug trends continue to have limitations. For example, drug trafficking trends are assessed mainly on the basis of seizure data. Seizures are, however, indirect rather than direct indicators, measuring not only drug trafficking trends, but also the level and effectiveness of law enforcement capacities. Nevertheless, the congruence of trends on illicit drug production and seizures in the case of both opiates and coca supports their statistical worth.

II. Global trends in illicit crop cultivation and the production of plant-based drugs, 2001-2002

8. The information on illicit crop cultivation and the production of plant-based drugs provided in the present report is based on estimates. The data presented for 2002 are preliminary. The estimates provide an indication of current trends in illicit drug production and the availability of drugs on illicit markets.

A. Cannabis

9. Cannabis remains the most widely used plant-based drug; it is cultivated and trafficked in most countries. Cannabis herb continues to be grown and trafficked primarily in Africa, the Americas and Central, South and South-East Asia. In addition, the indoor cultivation of cannabis continues to be of great concern in Europe and North America. The most important sources of cannabis resin remain North Africa and South-West Asia. Data and statistics on the growth in the wild and illicit cultivation of the cannabis plant continue to be scarce, making it difficult to estimate the extent of cannabis cultivation worldwide.

B. Opium

1. The illicit cultivation of opium poppy and the production of opium

10. The illicit world production of opium increased to an estimated 4,600 tons in 2002, up from 1,600 tons in 2001, a trend mainly relating to developments in Afghanistan.

11. In 2001, opium production in Afghanistan dropped to a low level, but it rose again to a high level in 2002. According to a survey carried out by UNDCP in 2002, the total area of cultivation was 74,000 hectares (ha) and the resulting production was 3,400 tons.³ That is similar to the amount produced in 2000 and higher than the amount produced during the 1990s (only in 1999 was more opium produced, during a peak harvest year). With this renewed increase, Afghanistan has again become the world's largest opium producer, accounting for almost 75 per cent of world annual opium production.

12. In 2002, UNDCP carried out the first comprehensive survey of opium poppy cultivation in Myanmar.⁴ The survey was conducted only in the Shan State; it should be noted, however, that the Shan State accounts for more than 90 per cent of the opium poppy cultivated in Myanmar. Extrapolations to the whole of Myanmar were based on eradication estimates. The results reflected a decrease in poppy

cultivation and the production of opium. About 828 tons of opium were produced in 2002, compared with 1,097 tons in 2001. The total area under opium poppy cultivation was estimated at approximately 81,400 ha. Estimates of the areas under cultivation in recent years were above 100,000 ha. The opium yield for the Shan State was found to range from 6.9 to 13.1 kilograms per hectare (kg/ha), with a mean of 10 kg/ha. The amount of opium produced in Myanmar accounted for less than 20 per cent of global production in 2002, a lower share than in previous years (except for 2001).

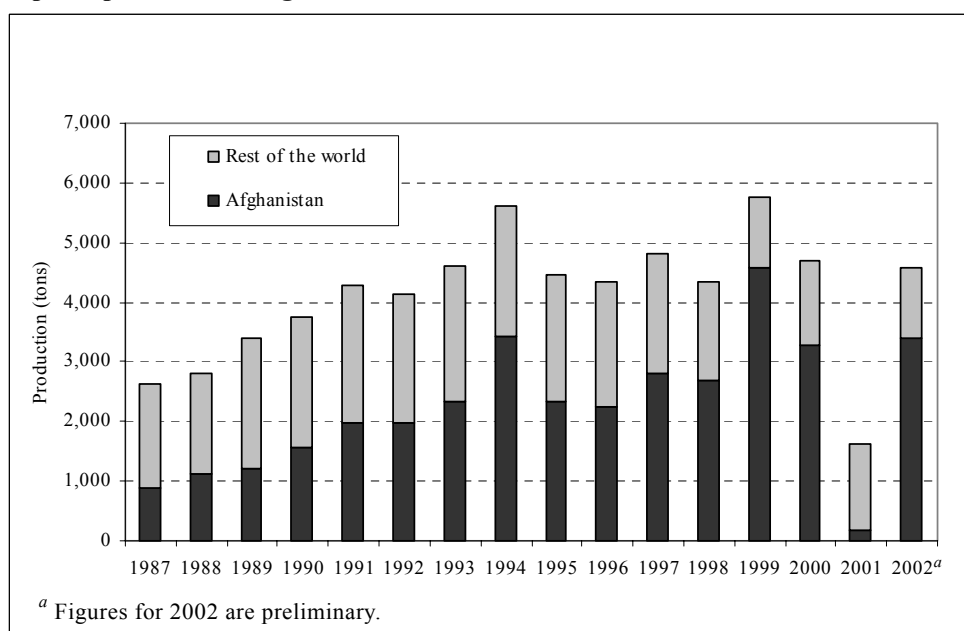
13. A survey of the extent of opium poppy cultivation was also carried out in the Lao People's Democratic Republic in 2002. The results of the survey indicated that there were 14,052 ha of opium poppy under cultivation in the season 2001/2002. That was the lowest national estimate since 1992, representing a reduction of 18 per cent compared with the previous season. That confirms the downward trend in opium poppy cultivation in the Lao People's Democratic Republic since 1999. The total potential opium production was estimated at 112 tons, with an average yield of 8 kg/ha.⁵

14. Opium production in other countries in Asia has remained limited. Thailand and Viet Nam have continued to reflect low levels of production and decreasing trends since mid-1990. Viet Nam reported a total of 323 ha under opium poppy cultivation in 2001. The reduction in opium poppy cultivation in Pakistan has been sustained in recent years. The country reported a total of 1,019 ha under opium poppy cultivation in 2001, of which 696 ha have been eradicated. Other countries that reported the illicit cultivation of opium poppy in 2001 included Armenia, Azerbaijan, Egypt, India and Lebanon. However, the total area that was detected to be under cultivation in those countries remained small and several countries reported that eradication campaigns had been implemented.

15. In Latin America, opium production continued in Colombia and Mexico, though remaining at a lower level than in Asia. The resulting heroin products, especially those from Colombia, were thought to be of very high purity. Heroin manufactured in Latin America continued to supply mainly illicit drug markets in North America. Other countries in Latin America that reported opium cultivation in 2001, though to a limited extent, included Guatemala (0.13 ha), Peru (135 ha) and Venezuela (39 ha).

16. Two countries produce most of the world's opium: Afghanistan (75 per cent) and Myanmar (slightly less than 20 per cent). Thus, less than 10 per cent of the world's opium originates in other countries. Of that, the Lao People's Democratic Republic accounted for 2 per cent. Other countries in Asia together continue to account for only 1 per cent and Latin America for about 3 per cent of the opium produced worldwide (see figure I).

Figure I

Opium production, Afghanistan and the rest of the world, 1987-2002**2. Opium farmgate prices**

17. Opium farmgate prices in South-West Asia have historically been far below the level of prices in South-East Asia. In 2001, however, prices in Afghanistan increased as a result of the sharp decline in opium production during that year. The average farmgate price for fresh opium was US\$ 301/kg in 2001, a 10-fold increase on the average price of US\$ 30/kg of previous years. The potential gross income from the sale of fresh opium by growers was around US\$ 56 million in 2001, approximately 38 per cent less than the estimate for 2000 (of around US\$ 91 million). Prices rose as a result of the reduction in opium production in 2001. Particularly sharp rising trends were noted during the second half of 2001, a possible indication that opiate stocks had started to be depleted. Latest estimates for November 2002 indicated a price of above US\$ 400 per kg of dry opium.⁶

18. In Myanmar, the average opium price in 2002 was estimated at US\$ 151 per kg.⁷ In recent years, opium farmgate prices in Myanmar were approximately US\$ 220 per kg and those in the Lao People's Democratic Republic were approximately US\$ 160 per kg. It was concluded that the price fluctuations in Myanmar over the year were owing to the fact that most opium was sold soon after it was harvested, between February and May.

3. The illicit manufacture of heroin

19. From the estimated total of 4,600 tons of opium produced in 2002, a potential 460 tons of heroin could be manufactured, although not all opium is converted into heroin. It is assumed that, in South-West Asia, the processing of opium into heroin is increasingly taking place within Afghanistan, making trafficking more profitable and the transportation of drugs easier. Estimates of the quantity and quality of

heroin manufacture in Afghanistan are not available. Reports received in November 2002 stated that three drug-processing laboratories had been dismantled in the province of Nangarhar, Afghanistan.⁸ Pakistan did not report any heroin processing in 2001. Turkey reported the detection of clandestine heroin manufacture and India detected six laboratories manufacturing heroin and one manufacturing morphine in 2001.

20. Reports of the illicit manufacture of heroin in South-East Asia have been received from the Hong Kong Special Administrative Region (SAR) of China and Myanmar in recent years. In 2001, Hong Kong SAR of China reported the detection of 12 heroin laboratories and Myanmar reported 16. In Latin America in 2001, the manufacture of heroin was reported by Colombia at six heroin manufacturing sites and by Mexico at one such site.

21. In Eastern Europe, the processing of opiate products, such as "Polish heroin", partly from poppy straw, was reported. In 2001, Poland dismantled 408 manufacturing sites, the Republic of Moldova reported the detection of 11, the Russian Federation detected 232 and Ukraine reported 30.

C. Coca

1. The illicit cultivation of coca bush and the production of coca leaf

22. Updated data on illicit coca bush cultivation and the production of coca leaf in 2002 were not yet available at the time that the present report was being prepared.

23. Global illicit coca bush cultivation and coca leaf production appeared to have stabilized in recent years, with between 800 and 1,000 tons of cocaine manufactured annually. While coca production in Bolivia and Peru registered a declining trend after the mid-1990s, coca production in Colombia rose during that period. In 2001, coca bush cultivation in Colombia appeared to have declined for the first time in a number of years. Such cultivation remained at high levels in 2002.

24. Estimates for 2001 indicated that the area under coca bush cultivation was 145,000 ha in Colombia, 46,000 ha in Peru and about 20,000 ha in Bolivia. That could result in the manufacture of more than 600 tons of cocaine in Colombia, 150 tons in Peru and 60 tons in Bolivia. Colombia thus accounts for about 75 per cent of global coca production, Peru for 18 per cent and Bolivia for 7 per cent. In 2001, the area under coca bush cultivation in Venezuela was reported to be 47 ha.

2. Coca farmgate prices

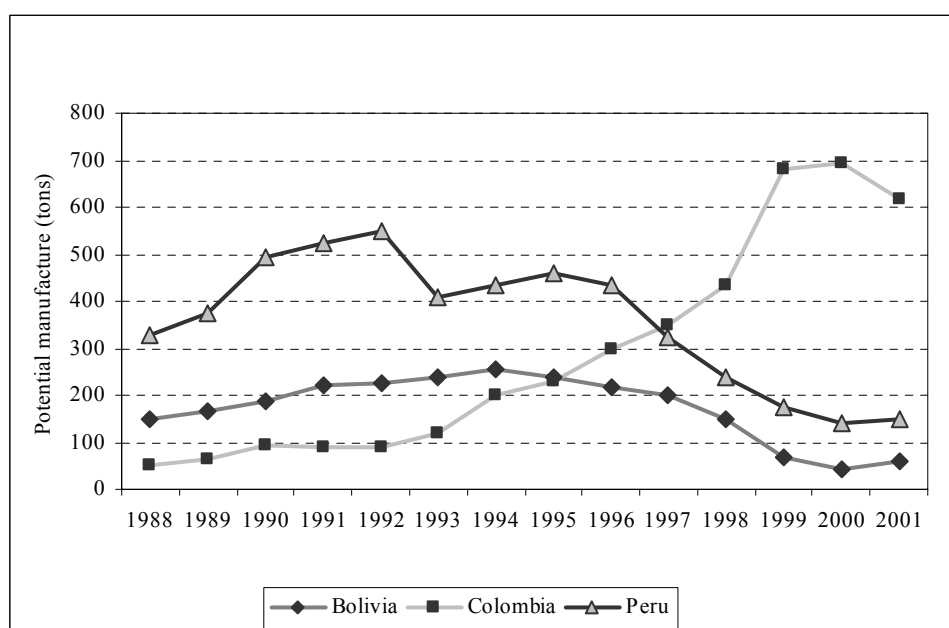
25. Farmgate prices for coca leaf remained high in all three producer countries. In Bolivia and Peru, the high prices were seen as an incentive for coca growers to replant coca bush. For 2001, Bolivia reported an average farmgate price of US\$ 4.34 per kg of coca leaf and US\$ 500 per kg of cocaine base. Prices reported by Peru ranged from US\$ 1.8 to US\$ 7 per kg for coca leaf, from US\$ 275 to US\$ 400 for coca paste and from US\$ 700 to US\$ 1,000 for cocaine base. Colombia reported a price range of US\$ 913-1,400 for cocaine base.

3. The illicit manufacture of cocaine

26. Estimates of the amount of cocaine manufactured were based on data for coca leaf production. The conversion rate for the processing of coca leaf into cocaine varied among producer countries. Since data for the cultivation of coca bush and the production of coca leaf for 2002 were not available at the time of compiling the present report, the latest estimates for the amount of cocaine manufactured have been based on coca production data for 2001. During that year, 827 tons of cocaine could have been manufactured, which is less than in 1999 and 2000 (see figure II).

Figure II

Potential cocaine manufacture, by producer country, 1988-2001



27. The detection of clandestine laboratories for the manufacture of coca products was reported by several countries in Latin America in 2001. Colombia reported the seizure of 1,085 cocaine laboratories and 470 laboratories manufacturing coca base. Peru detected 2 laboratories manufacturing cocaine hydrochloride and 64 laboratories manufacturing coca base. Two cocaine manufacturing sites were detected in Bolivia, six in Argentina and two in Venezuela.

28. In North America, the United States of America reported the detection of three cocaine laboratories and Canada dismantled one site manufacturing coca paste. Hong Kong SAR of China reported the detection of two laboratory sites for the clandestine manufacture of crack cocaine. The processing of cocaine products was also taking place in some countries in Europe. In 2001, Germany reported the detection of one laboratory and Spain detected five.

III. Global and regional trends in trafficking in plant-based drugs, up to 2001

A. Cannabis

1. Trafficking and seizure trends

29. Cannabis remains the most widely used plant-based drug of abuse and trafficking in both cannabis herb and cannabis resin continues on a large scale.

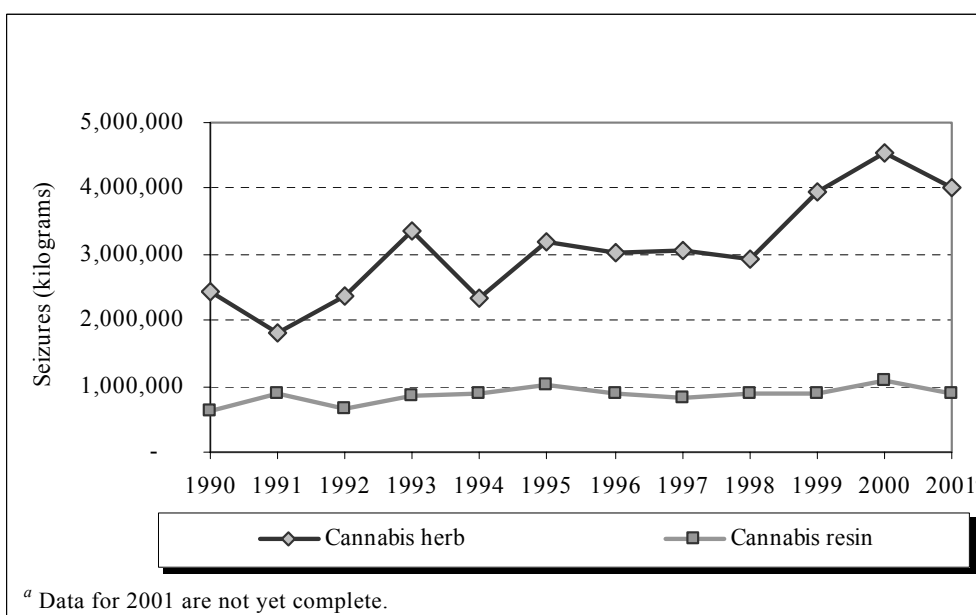
(a) Cannabis herb

30. The primary producer and consumer regions for cannabis herb remain Africa and the Americas. Cannabis herb is also widely available in Asia.

31. The most significant trend observed in recent years in respect of trafficking in cannabis herb has been the continuous increase in seizures at the global level. In the early 1990s, approximately 2,000 tons of cannabis herb were seized globally; between 1995 and 1998 3,000 tons were seized, in 1999, almost 4,000 tons, in 2000, 4,500 tons and in 2001, seizures dropped back to 4,000 tons (see figure III).

Figure III

Seizures of cannabis resin and cannabis herb, world total, 1990-2001



32. A regional breakdown of the data showed that, even in 2001, almost all regions reported seizure increases, including the Americas, which accounted for 70 per cent of global seizures, and Asia and Europe, which each accounted for about 5 per cent. Africa, which accounted for 20 per cent of global seizures, showed a decrease in 2001, mainly due to drops in South Africa (from 718 tons in 2000 to 123 tons in 2001) and in Malawi (from 312 to 8.6 tons). Other countries in Africa,

however, reported relatively large seizures in 2001, including Egypt (50 tons), Uganda (50 tons), the United Republic of Tanzania (250 tons) and Nigeria (318 tons). The United Republic of Tanzania and Nigeria reported the third and fourth largest seizure volumes worldwide in 2001.

33. The largest seizures by volume continue to be made in Mexico and the United States. Seizures in Mexico were particularly high in 2000 (1,837 tons) but declined somewhat in 2001, while remaining above the level of previous years. The reverse was noted in the United States, where seizures dropped significantly in 2000 but increased again in 2001 (683 tons).

(b) Cannabis resin

34. Cannabis resin, originating mainly in North Africa and South-West Asia, continues to be smuggled into Western Europe, the most important consumer region of that drug.

35. Global seizures of cannabis resin levelled off at less than 900 tons during the 1990s. In 2000, however, seizures increased to over 1,000 tons. That increase was mainly owing to a large volume of seizures in Morocco. In 2001, global seizures returned to 900 tons, the average level of previous years (see figure III).

36. Europe continued to account for 70 per cent of the global volume of seizures of cannabis resin. France and Spain, important entry points for cannabis resin originating in North Africa, registered rising seizure trends in 2001, amounting to 514 and 58 tons, respectively. However, Italy (16 tons), the Netherlands (11 tons), Portugal (6.5 tons) and Turkey (270 kg) registered declines. Relatively large seizure volumes were recorded by Romania (13 tons) and the Russian Federation (1.4 tons) in 2001.

37. Asia accounted for 15 per cent of global seizures of cannabis resin. Seizures in 2001 declined significantly in Pakistan (75 tons) and Saudi Arabia (1.8 tons) but increased in the Islamic Republic of Iran (46 tons), the United Arab Emirates (6.1 tons), Oman (2.4 tons) and Iraq (2.3 tons). India recorded a relatively stable level of 5.6 tons. South-West Asia remains an important source of cannabis resin. The pattern of seizures indicates that the route from South-West Asia via countries in the Near and Middle East to Europe remains an important trafficking gateway.

38. North Africa, another important source of cannabis resin, generally accounts for less than 10 per cent of global seizures. Morocco, which intercepts the largest quantities of cannabis resin in the region, reported 144 tons, a relatively large seizure volume, for 2000. In 2001, the volume seized, at 61 tons, marked a return to the average level of previous years.

B. Opiates

1. Trafficking and seizure trends

39. Global seizures of opiates (including heroin, morphine and opium) fell from 98 tons (in heroin equivalent) in 2000 to 70 tons in 2001. While morphine and opium seizures declined by more than 50 per cent, heroin seizures declined by less than 10 per cent.

40. The overall decline in seizures of opiates was related to the low opium production level in Afghanistan in 2001. The reason for the larger decline in opium and morphine production as compared to heroin production was the shift in trafficking patterns that had occurred in the years prior to 2001, in particular in South-West Asia. In the past, opiates had been trafficked out of producer regions in the form of opium and morphine and transported to other countries for further conversion into heroin. More recently, heroin has increasingly been processed closer to the production sites (for example, within Afghanistan). Thus, opiates have been increasingly smuggled out of producer areas in the form of heroin. As a result, seizures of opium and morphine, which are less frequently trafficked, decreased in 2000 and 2001. Seizures of heroin increased steadily in recent years, with a particularly large rise in 2000, reflecting the very large production levels in Afghanistan in 1999 and 2000. Similarly, the slight drop in heroin seizures in 2001 was related to the lower production level during that year.

(a) Opium

41. Global seizures of opium declined from 213 tons in 2000 to 103 tons in 2001, the lowest level since the early 1990s. The Islamic Republic of Iran continued to account for about 80 per cent of worldwide opium seizures. That country recorded decreases in opium seizures, from 204 tons in 1999 to 179 tons in 2000 and 81 tons in 2001.

42. Other countries in South-West and Central Asia also registered declining opium seizures in 2001. Pakistan reported a decrease from 8.8 tons in 2000 to 5.2 tons in 2001. Opium interceptions in Tajikistan fell from 4.8 tons to 3.6 tons, those in Uzbekistan declined from 2 tons to 240 kg and seizures in Kyrgyzstan decreased from 1.4 tons to 470 kg. All those declines were related to the decrease in opium production in Afghanistan in 2001.

43. The Russian Federation and Turkey recorded a decline in opium seizures in 2001. Opium interceptions in the Russian Federation declined from 2.2 tons in 2000 to 863 kg in 2001 and in Turkey from 363 kg in 2000 to 261 kg in 2001. The only countries in the South-West and Central Asia and Eastern Europe that reported a significant increase in opium seizures in 2001 were Lithuania (up from 1 kg to 436 kg), and the Republic of Moldova (up from 1.6 to 1.9 tons).

44. In 2001, opium seizures in South and South-East Asia remained at levels similar to those of 2000. The quantities intercepted in Myanmar remained stable (1.7 tons); they registered a slight decline in India (2.5 tons), in Viet Nam a slight increase (580 kg) and in China a somewhat larger increase (2.8 tons).

(b) Morphine

45. Seizures of morphine fell significantly in 2001. The Islamic Republic of Iran accounted not only for the largest opium seizures, but also for the bulk (90 per cent of morphine seizures worldwide). Seizures in the Islamic Republic of Iran declined, however, from 20.7 tons in 2000 to 8.6 tons in 2001. Pakistan reported, for the first time, significant quantities of morphine seizures in 2001, amounting to 1.8 tons.

46. Morphine continued to be smuggled through the Islamic Republic of Iran into Turkey, for conversion into heroin. Turkey, generally the only other country in the world with significant morphine seizures, also reported a decrease in 2001. The total

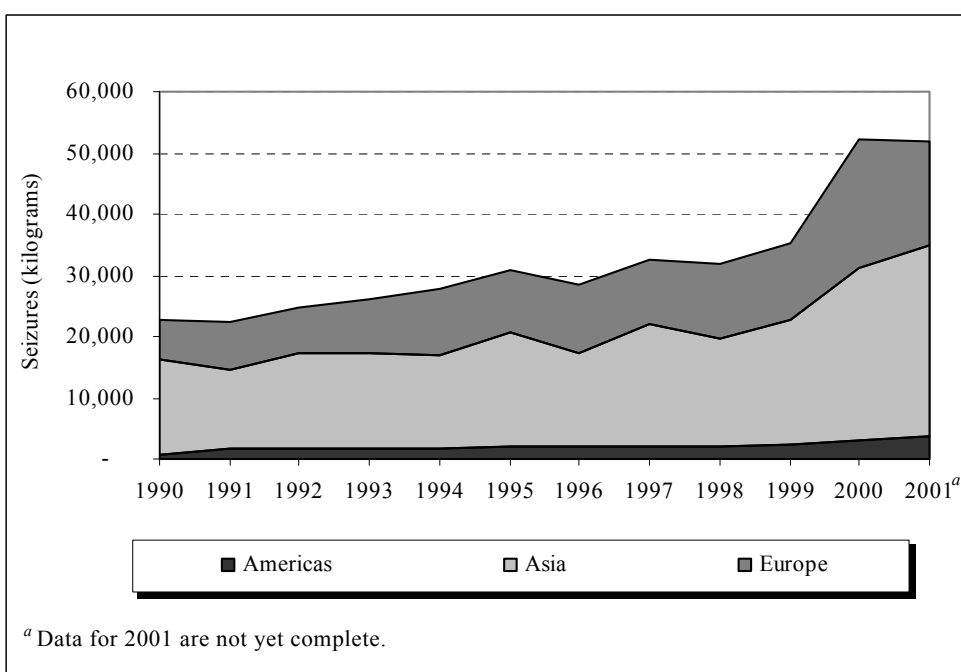
volume of morphine seized in the world amounted to 797 kg in 2001, down from 2.5 tons in 2000.

(c) Heroin

47. Global heroin seizures decreased in 2001 compared with the level of 2000. Heroin interceptions had risen steadily over previous years, reaching an unprecedented level of over 53 tons in 2000. That seizure record related to the record opium production level in Afghanistan in 1999 and 2000. In 2001, a total of 50 tons of heroin were seized, a 6 per cent decrease from the level of 2000, but the second highest level ever recorded. The decrease was assumed to be linked to the low opium production in Afghanistan during that year, though heroin manufactured in earlier years continued to be trafficked, thus resulting in only a slight decline in seizures. Most decreases occurred in countries along the trafficking routes in South-West Asia and Europe, while other regions, in particular East and South-East Asia, registered rising trends (see figure IV).

Figure IV

Heroin seizures in the Americas, Asia and Europe, 1990-2001



48. With the decrease in South-West Asia, the region's share of global heroin seizures declined from about 30 to 23 per cent. A similar share was accounted for by Western Europe. By contrast, heroin seizures in East and South-East Asia increased from approximately 15 to 27 per cent of the world total. Despite declining trends in neighbouring regions, heroin seizures in Central Asia increased and now account for 10 per cent of the world total. Eastern Europe and the Americas account for about 7 per cent each.

49. Heroin seizures in South-West Asia amounted to 11.3 tons in 2001, a 30 per cent decrease from the level of 2000. Both the Islamic Republic of Iran and Pakistan reported a decrease in 2001. In the Islamic Republic of Iran, heroin seizures dropped from 6.2 to 4 tons and those in Pakistan declined from 9.5 to 6.9 tons. However, the significant declines in both countries could be the result of the low opium production in Afghanistan in 2001, as well as the use of different trafficking routes in the region.

50. The three main routes used for smuggling opiates from Afghanistan to illicit markets, mainly in Europe, continue to be through the Islamic Republic of Iran, Pakistan and Central Asia. While all three routes continue to be used extensively, there has been an increasing shift in recent years to the use of the northern route, through Central Asia.

51. Heroin seizures in Central Asia have steadily increased in recent years, reaching an unprecedented 5 tons in 2001. That increase was mainly the result of Tajikistan's rising heroin seizures, which reached 4.2 tons in 2001 compared with 1.8 tons in 2000. However, heroin seizures in other Central Asian countries, which remain at a much lower level, decreased slightly in 2001.

52. Similar to trends in South-West Asia, heroin seizures in countries in South Asia, mainly India, declined from 1.3 tons in 2000 to roughly 900 kg in 2001.

53. In East and South-East Asia, heroin seizures increased in 2001, reaching a record level of almost 14 tons. That trend was mainly related to China, where the level of such seizures doubled in 2001 (compared with the level of 2000), amounting to 13.2 tons. In recent years, China has been used as an important transit country for heroin trafficking in the region.

54. Rising heroin seizure trends have also been recorded in countries in Oceania, mainly Australia, in recent years. In 2001, however, that country reported a seizure volume of 82 kg, which represented a significant decline from the levels recorded in previous years.

55. In Africa, heroin seizures remained at a relatively low level. That could be in part attributable to difficulties relating to law enforcement capacities in the region and a lack of reporting rather than being a true reflection of the extent of drug trafficking. Africa continues to be heavily used as a transit region, primarily for heroin manufactured in Afghanistan and mainly destined for Western Europe which is often trafficked via Pakistan. In reports received from African countries, Pakistan was mentioned as the country from which heroin was most frequently smuggled into Africa. The largest heroin seizures were reported in 2001 by Nigeria (47 kg), Egypt (38 kg) and Mauritius (25 kg).

56. Heroin seizures in countries in Western Europe (excluding the United Kingdom of Great Britain and Northern Ireland) fell slightly in 2001, amounting to roughly 11 tons. In many European countries, heroin seizures have been fluctuating in recent years, with decreasing trends recorded in 2001. Turkey reported a seizure volume of 4.3 tons in 2001, down from 6 tons in 2000. Decreased heroin seizures were also recorded in Greece (330 kg) and to a lesser extent in the Netherlands (740 kg) and Portugal (316 kg). Rising trends were observed in Italy (2 tons), Germany (835 kg), Spain (630 kg) and Austria (288 kg).

57. In Eastern Europe, the most noticeable change in heroin seizure trends occurred in Bulgaria, which reported a heroin seizure volume of 1.5 tons in 2001, compared with 2 tons in 2000. Bulgaria's heroin seizures in previous years, however, were at a much lower level. Other countries in Eastern Europe with declining heroin seizure volumes in 2001 included Poland (208 kg), Hungary (154 kg), Slovenia (89 kg) and the Czech Republic (88 kg). The only country in Eastern Europe with a significant increase in heroin seizures in 2001 was the Russian Federation, which reported a heroin seizure volume of 1.3 tons. Heroin seizure increases in the Russian Federation, in addition to those in Tajikistan, further indicated the increased use of the northern trafficking route.

58. In North and South America heroin seizures continued to rise. The United States reported record seizures of almost 2 tons in 2001, a 16 per cent increase compared with those made in 2000. Seizures also increased in Colombia (787 kg), Ecuador (254 kg) and Venezuela (228 kg). The two latter countries border Colombia and continue to be used as transit countries for drugs smuggled out of Colombia, mainly into the United States and Canada. Mexico registered a slight decrease in heroin seizures (263 kg).

2. Interception rate and potential availability of opiates on the world market

59. In 2001, heroin manufacture was estimated at about 160 tons, a very low level attributable to the drop in opium production in Afghanistan. The total amount of opiates seized worldwide in 2001 amounted to 70 tons (in heroin equivalent), which would be an interception rate of 44 per cent. The potential availability of opiates (in heroin equivalent) on the world market would be 90 tons (160 tons minus 70 tons), based on a one-year period. The interception rate was previously between 10 and 20 per cent and the availability of opiates varied from roughly 300 to 500 tons. Both the above-mentioned interception rate and the potential availability for 2001 would appear to be unrealistic. It was concluded that a portion of the opiates produced during harvests prior to 2001 must have been stockpiled and released during the low opium production year of 2001.

3. Heroin prices and purity levels

60. Pakistan reported that heroin retail prices had increased sharply in 2001, following the opiate price increase in Afghanistan. That was seen as an indication that stocks of opiates in Afghanistan had started to be depleted towards the end of that year, which was characterized by very low production. Further, the Islamic Republic of Iran reported that prices of opiates had started to rise at the end of 2000 and continued to do so until mid-2001.

61. Heroin prices in Europe seem to have remained stable. However, a number of countries, including Finland, Portugal and the United Kingdom, reported a decrease in the purity of heroin in 2001. In the United Kingdom, for example, the purity level of heroin at the street level fell from 61 per cent at the beginning of 2001 to 43 per cent at the end of 2001. It appears that drugs were increasingly being diluted due to the decrease in the availability of heroin.

C. Cocaine

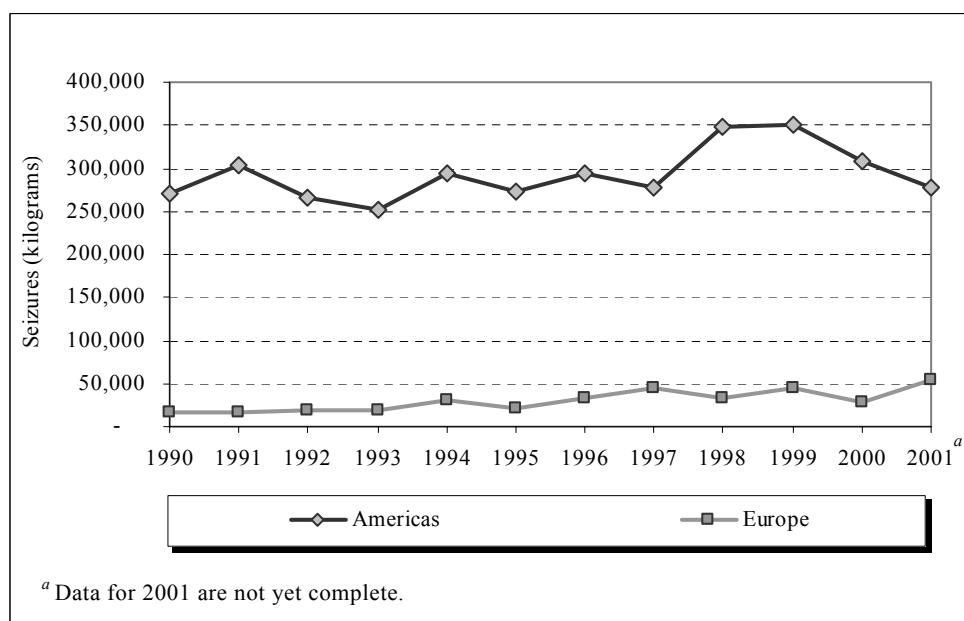
62. In 2001, the amount of cocaine manufactured worldwide was estimated at about 830 tons and global cocaine seizures amounted to just above 300 tons, indicating an interception rate of 36 per cent. The potential availability of cocaine on world markets would be 530 tons. Such estimates remain within the average range of recent years.

1. Trafficking and seizure trends

63. Cocaine trafficking, measured in terms of global seizure trends, appears to have remained largely unchanged in 2001 and 2000. Global cocaine seizures were estimated at 380 tons in 1998 and 395 tons in 1999, decreasing to 338 tons in 2000, and were presumed to be at similar levels in 2001 (see figure V).

Figure V

Cocaine seizures in the Americas and Europe, 1990-2001



64. In 2000, the decreasing seizure trend mainly related to North America and Western Europe, the two principal illicit markets for cocaine. In 2001, however, interceptions of cocaine consignments decreased in South and Central America, while cocaine seizures in North America and Western Europe rose again.

65. In 2001, cocaine seizures rose in Canada (1.7 tons), Mexico (30 tons) and the United States (106 tons). Seizures in Canada and Mexico have registered comparable fluctuation trends in recent years. Both countries recorded an increase in 2001, which was, however, within their average range. Cocaine seizures in the United States decreased significantly in 2000 and rose again somewhat in 2001, though remaining below the levels of 1998 and 1999.

66. In South America, the most significant decrease in cocaine seizures in 2001 occurred in Colombia. That country recorded a total cocaine seizure volume of 73.8 tons in 2001, compared with 110 tons in 2000. Declining cocaine seizures were also recorded in Bolivia and Peru. Ecuador and Venezuela, both bordering Colombia, have registered rising trends in recent years. In 2001, Venezuela's cocaine seizures (13.5 tons) were slightly below the 2000 total, while Ecuador's seizures (12.2 tons) more than tripled. Cocaine interceptions in Argentina (2.2 tons) and Chile (2.4 tons) remained stable. A particularly large seizure total, amounting to 2.3 tons, was reported by Suriname in 2001. Suriname is used as a gateway for consignments of illicit drugs destined for countries in Europe, mainly the Netherlands. Since cocaine seizures have also been rising significantly in Western Europe, it may be assumed that Europe is again being increasingly targeted by cocaine traffickers.

67. With regard to drug trafficking routes, Brazil remains an important transit country in particular for consignments of illicit drugs such as cocaine destined for Western Europe and often diverted via Africa. In addition, the Pacific and Caribbean routes, the latter in particular, continue to be frequently used to smuggle drugs from Colombia into the United States and Europe; Colombia is an important source not only of cocaine, but also of heroin and cannabis.

68. Cocaine seizures in Central America have declined in recent years. The subregion is largely used as a transit area for illicit drug consignments destined for the United States. Cocaine seizures in the United States have registered similar declines since 2000. The most significant decreases were recorded in Costa Rica (1.7 tons) and Panama (2.6 tons), while Belize (3.8 tons) and Guatemala (4.1 tons) registered increases.

69. Cocaine seizures in the Caribbean have remained largely stable, with minor fluctuations, in recent years. The total for 2001 was also within the average range, amounting to roughly 11 tons. Some countries and territories, such as the British Virgin Islands (2.1 tons), the Dominican Republic (1.9 tons), Jamaica (2.9 tons) and Trinidad and Tobago (820 kg), recorded rising cocaine seizures in 2001, while the Bahamas (1.4 tons) and Haiti (1 ton) noted declining seizures.

70. Africa continues to be used as a transit area for cocaine consignments destined mainly for Europe. The number of cocaine seizures reported remained at a relatively low level, which is possibly a reflection of the difficulties faced by law enforcement agencies, combined with incomplete reporting, rather than a reliable indication of trafficking trends. However, various African countries, including the Congo, Kenya, Namibia, South Africa, Swaziland, Uganda, Zambia and Zimbabwe, reported on the problems and consequences of drugs being trafficked through their territories. One of the consequences described was the spillover effect. In South Africa, for example, cocaine abuse was rising significantly. In 2001, cocaine seizures rose in Nigeria (195 kg), South Africa (155 kg) and Togo (30 kg).

71. Asia remains less affected by cocaine trafficking. The only countries or territories with regular seizures of small quantities of cocaine remain Hong Kong SAR of China (30 kg), Indonesia (31 kg), Japan (24 kg), Israel (24 kg) and Lebanon (7 kg). The exception is the Syrian Arab Republic, which reported a relatively large volume of cocaine seizures in 2001, amounting to over 1 ton.

72. Australia reported relatively large cocaine seizures in 2000 and 2001, amounting to 1.4 and 1.2 tons, respectively. Prior to 2000, cocaine seizures amounted to less than 105 kg.

73. Western Europe was the only subregion worldwide with a significant increase in cocaine seizures in 2001. The total volume of cocaine seizures in the region had been steadily rising until the mid-1990s, but since then, interception rates have fluctuated between about 30 and less than 45 tons. A relatively low cocaine seizure level was recorded in 2000, amounting to 27.7 tons. In 2001, however, seizures have been rising again and may have reached more than 55 tons.

74. Europe remains an important consumer market for cocaine. The greatest increase in cocaine seizures was reported by Spain, which reported having seized a total of 33.7 tons of cocaine in 2001, up from 6.2 tons in 2000. But other countries in Europe also reported rising cocaine seizures, including France (2.1 tons), Germany (1.3 tons), the Netherlands (8.4 tons) and Portugal (5.6 tons), all of which were important entry points for cocaine shipments originating in the Americas. The only country in Europe that reported a significant decrease in cocaine seizures in 2001 was Italy (1.8 tons).

75. Seizures in Eastern Europe remain small. The subregion does not seem to have been targeted as an entry point for cocaine consignments destined for Western Europe. Cocaine for consumption purposes may have been available in some countries in Eastern Europe such as the Russian Federation, which recorded relatively large cocaine seizures (82 kg).

2. Interception rate and potential availability of cocaine on the world market

76. In recent years, interception rates for cocaine, assessed on the basis of global seizure quantities measured against production levels, have been much higher than interception rates for opiates. It is assumed that that may partly be due to differences in trafficking patterns.

3. Cocaine prices and purity levels

77. Several countries in the Americas reported that prices for cocaine remained stable in 2001. The purity level, however, seemed to have decreased slightly. Argentina reported that purity levels of cocaine continued to decrease. Panama noted a decline from 80 to 60 per cent. The United States reported purity levels of 77 per cent in 2000 and 68 per cent in 2001.

78. A similar trend was noted in Europe. While some countries reported no change in 2001, others, including Norway and the United Kingdom, reported a decrease in the purity level of cocaine. Portugal noted the price of cocaine had declined in 2001.

IV. Global and regional trends in the illicit manufacture of and trafficking in synthetic drugs, up to 2001

A. Amphetamine-type stimulants

79. Amphetamine-type stimulants (ATS), including amphetamine, methamphetamine and substances similar to methylenedioxymethamphetamine (MDMA), known as Ecstasy, remain the synthetic drugs of greatest concern.

80. The illicit manufacture of and trafficking in ATS continue, mainly in North America, Western Europe and South-East Asia. Unlike plant-based drugs, the manufacture of synthetic drugs occurs within their main consumer areas, such that, with the exception of Ecstasy-type substances, trafficking in synthetic drugs is largely confined to the regional level.

81. Although stimulant seizure trends rose rapidly in all three regions from 1991 to 2000, they started to stabilize in North America in 2000 and fell in Western Europe after 1999; in East and South-East Asia they continued to rise rapidly during that period. In 2001, seizures remained more or less stable in North America and Western Europe, while East and South-East Asia recorded a significant decline. Seizures of Ecstasy, which had been steadily rising worldwide until 2000, declined for the first time in 2001.

1. Illicit manufacture of amphetamine-type stimulants

82. The statistics on detections of clandestine laboratories provided in the present chapter do not give an indication of the volume of synthetic drugs manufactured. Information on laboratory seizures is included here to provide an overview of regional trends in the manufacture of ATS.

83. Data on the detection of methamphetamine laboratories in North America revealed a rise in 2001. Both Canada and the United States reported an increase in the number of laboratories seized, while Mexico recorded a decline. In 2001, the United States again reported the highest number of seizures of methamphetamine laboratories, totalling 7,990, while Canada dismantled 13 and Mexico 19. It remains to be seen whether that increase in the United States suggests a rise in the availability and abuse of methamphetamine in the country.

84. In South-East Asia, the manufacture of methamphetamine continued on a large scale. Laboratories were detected in Thailand (10), Myanmar (5), the Philippines (3) and the Republic of Korea (1). China also reported the seizure of 44 clandestine laboratories manufacturing ATS. New Zealand has reported an increasing number of seizures of methamphetamine laboratories in recent years; a total of 39 were reported for 2001.

85. In Europe, where the abuse of methamphetamine is less widespread, the number of countries reporting manufacture of that drug has been rising in recent years. The Czech Republic, which used to be the only country reporting methamphetamine manufacture in Europe, detected 28 laboratories manufacturing that substance in 2001. Slovakia dismantled 10 methamphetamine laboratories and Germany 3. It appears that the manufacture of methamphetamine may have spread from the Czech Republic to neighbouring countries.

86. The manufacture of amphetamine continues to take place primarily in Western Europe. The Netherlands, which remains an important source country for ATS, detected 10 amphetamine laboratories in 2001, while the United Kingdom reported detecting 5, Sweden 3 and Belgium, Denmark and Germany 1 each. In Eastern Europe, Poland remains an important source of amphetamine. The country dismantled 12 laboratories manufacturing amphetamine in 2001. Bulgaria reported six such amphetamine manufacturing sites. The number of amphetamine laboratories detected in the Russian Federation has been rising in recent years and a total of 71 were reported to have been seized in 2001. Finally, the United States reported having seized 52 amphetamine laboratories, in addition to the huge number of methamphetamine laboratories (see paragraph 83 above).

87. The Netherlands remains the most important country used for the manufacture of Ecstasy-type substances: it dismantled a total of 25 laboratories manufacturing MDMA in 2001. Other countries in Europe that detected the manufacture of Ecstasy in 2001 included Belgium (4), Germany (2) and the United Kingdom (1).

88. While Ecstasy-type substances manufactured in Western Europe continue to be trafficked worldwide, the number of detected laboratories manufacturing those substances in other regions is rising. In 2001, the United States reported having seized 17 MDMA laboratories and Canada reported having seized 2 MDA laboratories. The manufacture and availability of Ecstasy are also rising in East and South-East Asia. Laboratory seizures in 2001 included nine in Indonesia, three in Hong Kong SAR of China and two in New Zealand. South Africa reported the detection of five MDMA laboratories in 2001.

2. Trafficking and seizure trends

89. In North America, the main stimulant seized continued to be methamphetamine. Both the United States (2.8 tons) and, to a lesser extent, Canada (53 kg) recorded a slight increase in the volume of methamphetamine seizures in 2001. The United States accounted for 85 per cent of stimulant seizures in the region. Mexico reported a decrease in seizures of methamphetamine (398 kg) and amphetamine (20 kg).

90. ATS seizures in Western Europe are mostly of amphetamine, though an increasing number of countries are additionally recording some methamphetamine seizures. Seizures of ATS in the Netherlands, which had significantly declined in 2000, rose once again in 2001 (579 kg). Of particular interest is the apparent trend in the Nordic countries. Denmark (160 kg), Finland (137 kg) and Sweden (245 kg) recorded a relatively large rise in amphetamine seizures in 2001. Norway's seizures of 93 kg remained unchanged from 2000. In addition, each of the four countries reported seizures of methamphetamine to be at a low level but, in most cases, slightly increased compared with previous years. Decreasing trends in amphetamine seizures were recorded by Germany (262 kg), France (57 kg) and, in smaller quantities, Switzerland (4.6 kg). Spain and Italy reported having seized relatively small quantities of amphetamine in 2001, but both countries additionally made some methamphetamine seizures.

91. Seizures of stimulants in Eastern Europe increased in Poland (195 kg), which is increasingly emerging as a source of amphetamine. The trafficking in ATS also continued in the Baltic States. Estonia and Latvia recorded increases in

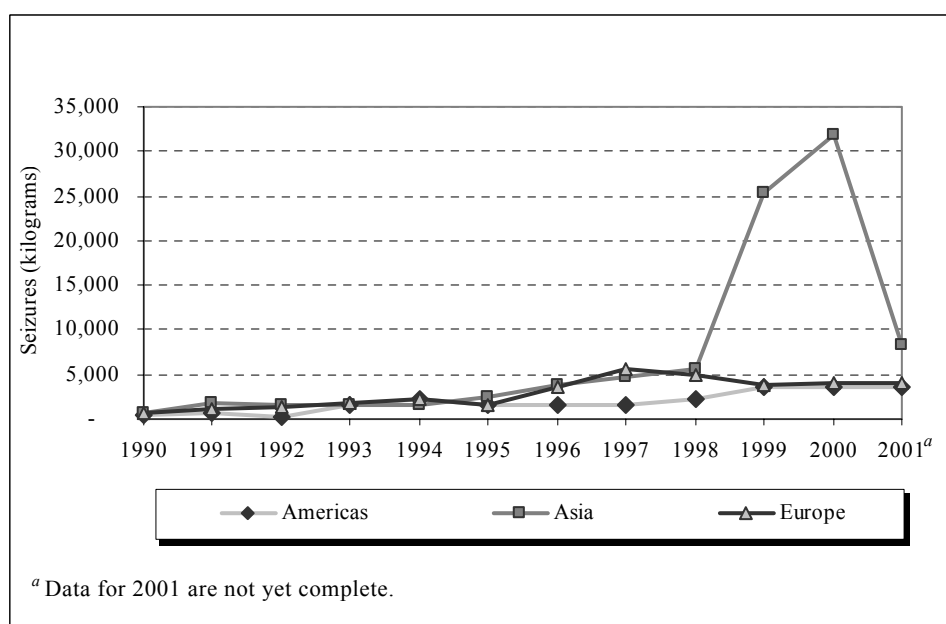
amphetamine seizures, while Lithuania noted a decrease in amphetamine seizures but a relatively large volume of methamphetamine seizures (6.9 kg). The Czech Republic continued to intercept mainly methamphetamine (17.2 kg), but also reported seizures of amphetamine (6 kg) in 2001. A number of other countries in Eastern Europe, including Hungary, Slovakia and Slovenia, continued to record seizures of relatively small quantities of amphetamine, but had also made some methamphetamine seizures in 2001. It appears that the availability of methamphetamine in Europe is rising.

92. The global decline in stimulant seizures in 2001 is related to trends in South-East Asia, mainly China. That country reported very large methamphetamine seizures in 1999 and 2000: over 16 and 20 tons, respectively. In 2001, however, methamphetamine seizures in China declined to 4.8 tons. Japan also noted a significant decline, from 2 tons in 1999 and 1 ton in 2000 to 419 kg in 2001. Other countries in South-East Asia, however, continued to report rising methamphetamine seizures, including the Philippines (1.7 tons), Myanmar (993 kg) and the Republic of Korea (170 kg).

93. In 2001, a decrease in seizures of Ecstasy-type substances was noted globally, after many years of continuously rising trends. In North America, seizures in both the United States and Canada had increased significantly in previous years and, in particular, in 1999 and 2000. Both countries recorded a decrease in 2001, reporting 854 kg and 506 kg, respectively (see figure VI).

Figure VI

Seizures of stimulants, including amphetamine and methamphetamine, in the Americas, Asia and Europe, 1990-2001



94. A similar trend was noted in Western Europe. The Netherlands, the main source country of Ecstasy-type substances, recorded an enormous seizure volume in 2000, while the volume seized in 2001 fell somewhat (to 981 kg). Declining trends were also noted in Austria, France, Ireland, Italy, Sweden and Switzerland. However, other countries in Western Europe recorded an increase in seizures of Ecstasy in 2001, including Denmark, Germany, Norway, Portugal and Turkey. Seizures in Finland, Greece and Spain remained more or less stable. No figures on seizures were available from Belgium or the United Kingdom, which generally record relatively large volumes. Interceptions of Ecstasy in Eastern Europe, which remained relatively low until 1999, rose in 2000 and 2001, particularly in Bulgaria, the Czech Republic, Poland and Romania.

95. Ecstasy-type substances continued to be trafficked to East and South-East Asia. China, which usually records the largest seizure volumes, noted an increase in 2001 (270 kg). A rising trend was also noted in Japan, though seizures there were at a lower level. It remains to be seen whether methamphetamine, seizures of which had been decreasing in both China and Japan, is being replaced by Ecstasy.

B. Other drugs

1. Illicit manufacture of other drugs

96. Reports received on the illicit manufacture of other drugs in 2001 mentioned the detection of four laboratories manufacturing phencyclidine (PCP) in the United States and one manufacturing lysergic acid diethylamide (LSD) in Denmark.

2. Trafficking and seizure trends

97. As for seizures of hallucinogens (other than Ecstasy-type substances) in 2001, the United States reported the seizure of a total of 125 kg of PCP and Canada the seizure of 37 kg of methylphenidate. The largest LSD seizures in 2001 were made by Canada and the Russian Federation.

98. Large quantities of depressants were intercepted by Oman, which reported seizing a total of 1.8 tons of barbiturates. Some countries in Africa continued to report seizures of large quantities of depressants. Togo reported the seizure of 1.9 tons of depressants, including pharmaceutical products and Côte d'Ivoire seized 298 kg of benzodiazepines.

99. Seizures of methaqualone rose again in 2001. The illicit manufacture of that drug is assumed to take place in China and India and large quantities continue to be smuggled into Southern Africa, where its illicit manufacture has also started. Global methaqualone seizures rose sharply at the beginning of the 1990s, reaching 45 tons in 1994. The bulk was intercepted by India. After 1996, seizures remained below 2.3 tons. In 2001, however, they exceeded 10 tons, most of which was seized in South Africa, one of the most important consumer countries of that drug. Seizures in South Africa rose steadily throughout the 1990s, reaching 780 kg in 2000. In 2001, a total of 8.3 tons was intercepted. It is assumed that methaqualone is also being manufactured in Southern Africa. India seized a total of 2 tons in 2001.

100. Khat, which is not under international control, continues to be seized in large quantities by countries in East Africa and the Middle East. Saudi Arabia reported the seizure of 93 tons of khat and the United Republic of Tanzania 1.9 tons in 2001. In 2001, large seizures were recorded by Canada (12 tons), Denmark (3.3 tons), Finland (660 kg), Germany (2.9 tons), Norway (2.3 tons) and Sweden (4 tons).

V. Conclusions

101. The major issues confronting Governments in their response to illicit drug trafficking include:

- (a) The effect of the widespread illicit cultivation of opium poppy and the production or manufacture of and trafficking in opium and heroin in Afghanistan;
- (b) Aggressive trafficking in cocaine using new and diverse routes and a modus operandi of rapidly adaptive concealment;
- (c) The underrated threat posed by cannabis abuse to health security and the social fabric of societies, particularly in Africa;
- (d) The significant rise in the manufacture and abuse of synthetic drugs, in particular ATS;
- (e) The ongoing requirement to develop stronger controls over the movement of precursors subject to diversion for purposes of illicit drug manufacture.
- (f) The need to deprive traffickers of their ill-gotten gains by continuing to press for an effective strategy against money-laundering to ensure the freezing, seizing and confiscation of assets derived from drug trafficking.

102. The statistical data on seizures of illicit drugs and precursors provided by Governments highlight areas where interdiction efforts have succeeded and areas where they have failed, when mutual support, cooperation and coordination between law enforcement agencies could have been improved.

103. The illicit cultivation and production of opium in Afghanistan poses a threat to the immediate region and beyond. States that share borders with Afghanistan should be encouraged to cooperate with the Transitional Authority of Afghanistan to develop effective border control strategies that would enhance the capacity of law enforcement agencies to counter illicit drug trafficking.

104. Responding quickly to the ability of trafficking groups to adapt their modus operandi in response to law enforcement initiatives is crucial to successful interdiction. It should be a matter of priority for Governments to ensure that all their agencies work together and pool their resources and intelligence to combat drug trafficking. Governments must continue to look closely at ways of enabling their law enforcement agencies to strengthen their capacity to counter drug trafficking networks by making effective bilateral and regional agreements. Even the adoption of direct and simple responses such as the posting of drug liaison officers can bring significant and immediate benefits.

105. All Member States should review, as a matter of urgency, their current policies and assess the steps they have taken to control the manufacture, movement and use of the precursor chemicals essential to the manufacture of illicit drugs. The growing

interest in and widespread abuse of ATS and the evident mobility of their places of manufacture are additional reasons for reviewing such controls. Operation Topaz, Operation Purple and Project Prism have highlighted how specific and focused attention on a few key precursors can prevent their diversion for illicit purposes and should be fully supported.

106. Action to halt the illicit manufacture of, trafficking in and abuse of synthetic drugs should be given a higher priority. Established production regions are now exporting their technical expertise as well as their illicit products in order to help establish production sites in States previously exposed to minimal quantities of imported ATS.

107. The trafficking in and abuse of cannabis continue to give cause for concern in many Member States. The abuse of cannabis threatens the health and social fabric of many societies, while its trafficking, particularly in Africa, supports criminal enterprises that undermine the security of communities. Greater priority should be given to countering the abuse of and trafficking in cannabis in order to avoid undermining the drug control policies of Governments aimed at countering all illicit drugs.

Notes

¹ United Nations, *Treaty Series*, vol. 976, No. 14152.

² Ibid., vol. 1019, No. 14956.

³ United Nations, Office on Drug Control and Crime Prevention, *Afghanistan: Opium Survey 2002* (October 2002).

⁴ United Nations, Office on Drug Control and Crime Prevention, *Myanmar: Opium Survey 2002* (August 2002).

⁵ United Nations, Office on Drug Control and Crime Prevention, *Lao People's Democratic Republic: Opium Survey 2002* (August 2002).

⁶ United Nations, Office on Drug Control and Crime Prevention, Country Office for Afghanistan, "Monthly situation report", November 2002.

⁷ United Nations, Office on Drug Control and Crime Prevention, *Myanmar: Opium Survey 2002* (August 2002).

⁸ United Nations, Office on Drug Control and Crime Prevention, Country Office for Afghanistan, "Monthly situation report", November 2002.