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**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 drug trafficking**Report of the Secretariat***Summary*

The present report contains an overview of global trends and patterns in illicit drug production and trafficking according to the latest information available to the United Nations Office on Drugs and Crime.

In 2005, the area under illicit opium poppy cultivation in Afghanistan declined by 21 per cent. However, as a result of good weather conditions, total opium production declined only marginally. In South-East Asia, illicit opium poppy cultivation continued to decline in both the Lao People's Democratic Republic and Myanmar. The net result of those developments is an estimated decline of 4 per cent in potential heroin manufacture to 467 tons. Afghanistan currently accounts for 88 per cent of the world's illicit opium production.

In the Andean countries, after declining for three consecutive years, illicit coca bush cultivation increased by 3 per cent in 2004. Coca bush cultivation declined in Colombia, but increased in both Bolivia and Peru. Potential cocaine production was estimated at 687 tons in 2004 (an increase of 2 per cent compared with the previous year). Of that total, Colombia accounted for 56 per cent, Peru 28 per cent and Bolivia 16 per cent.

* E/CN.7/2006/1.



The year 2004 saw increased seizures of all drugs except amphetamine-type stimulants (minus 26 per cent). Global seizures of Ecstasy-type substances, however, increased by 77 per cent.

Record-high volumes of both heroin (59 tons, an increase of 11 per cent) and cocaine (578 tons, representing an increase of 16 per cent) were seized in 2004.

Countries in Europe reported the largest absolute increase in heroin seizures. For the first time, the volume of heroin seized in South-Eastern Europe surpassed the volume seized in Western and Central Europe. Countries neighbouring Afghanistan continued to be heavily affected by trafficking in opiates. Heroin seizures in the Americas and in Oceania declined but increased in Africa, in particular in Western Africa.

Cocaine seizures in North America and South America together accounted for more than three fourths of the global total. Seizures in Europe remained stable, but at high levels. Central America continued to be one of the main transit routes targeted by traffickers. In Africa, from comparatively low levels, cocaine interdiction increased twofold.

Global interdiction of cannabis herb rose by 7 per cent and that of cannabis resin by 6 per cent. Africa and North America continued to account for the bulk of cannabis herb interdiction, and European countries accounted for the greater part of cannabis resin seizures.

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I. Introduction

1. The present report provides an overview of developments in the production of and trafficking in the main illicit drugs at the global and regional levels, based on the latest information available to the United Nations Office on Drugs and Crime (UNODC).
2. The report presents an overview of the drug trafficking situation worldwide to assist Member States in their efforts to fight illicit drug production and trafficking.
3. Information on illicit drug crop cultivation and on the production of plant-based drugs has been drawn from the latest illicit crop monitoring surveys conducted by UNODC. The primary sources of information on drug seizures were replies to the annual reports questionnaire, part III (Illicit supply of drugs), submitted by Governments for 2004 and previous years.
4. Other sources of information included reports on significant drug seizures and other reports received by UNODC or submitted to the Commission on Narcotic Drugs and its subsidiary bodies. The report is based on information received by UNODC as at 17 November 2005.¹
5. The trafficking trends described in the report are mainly based on drug seizure data. Statistics on drug seizures offer valid, indirect indicators of trafficking trends. However, they should be treated with caution, as they also reflect on the level and effectiveness of law enforcement and different reporting practices.

II. Global trends in illicit drug crop cultivation and the production of plant-based drugs, 2004-2005

A. Cannabis

6. Cannabis continues to be the most widely produced, trafficked and consumed plant-based drug worldwide. Morocco remains the main producer of cannabis resin (hashish) in the world; cannabis resin is produced in that country primarily for European markets. The 2004 survey of cannabis plant cultivation conducted by UNODC in Morocco² estimated an area of 120,500 hectares (ha) under such cultivation (10 per cent less than in 2003). Afghanistan and Pakistan also supply cannabis resin to the international market, for an estimated total global production of 7,400 tons. More than 300 illicit laboratories producing substances of the cannabis-based group were reported to have been dismantled worldwide in the period 2003-2004; the majority of them were in countries in Europe. A total of 41 Member States in all regions reported on cannabis plant eradication efforts over the same period.

B. Opium

1. Illicit cultivation of opium poppy and production of opium

7. In 2005, the area under illicit opium poppy cultivation in Afghanistan declined by 21 per cent to 104,000 ha. That overall decline, however, disguises significant

regional differences. Opium production doubled in the northern and western parts of Afghanistan, while declining in the central, eastern and north-eastern provinces. Due to good weather conditions, the average opium yield increased by 22 per cent. As a result, total opium output declined only marginally (4,100 tons, compared with 4,200 tons in 2004).³

8. As a result of developments in Afghanistan and in South-East Asia, the total area under illicit opium poppy cultivation worldwide fell by 22 per cent to 152,700 ha. Global illicit opium production declined by 4 per cent to 4,670 tons (see figures 1 and 2). Afghanistan currently accounts for 88 per cent of the illicit opium produced worldwide.

Figure 1

Global illicit opium poppy cultivation, 1993-2005

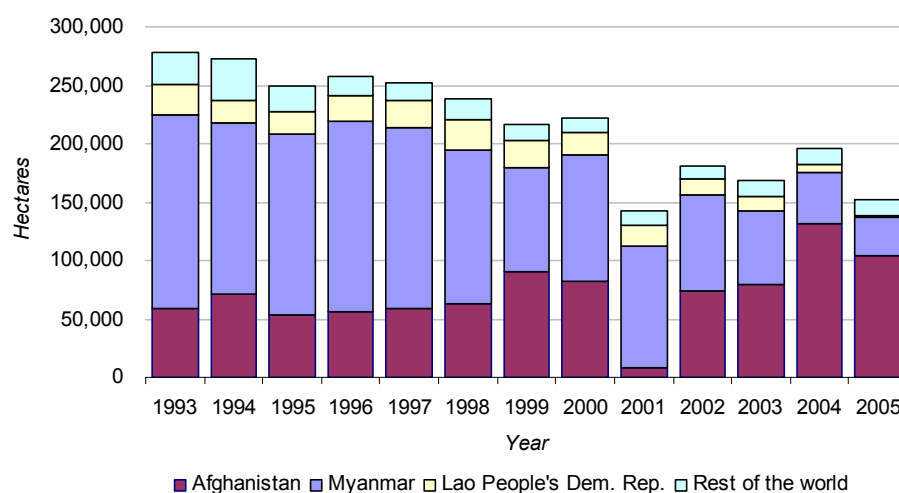
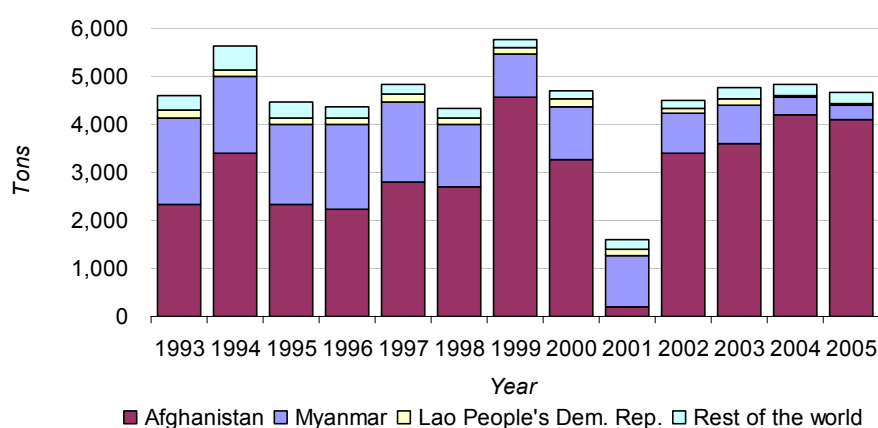


Figure 2

Global illicit opium poppy production, 1993-2005



9. The 2005 UNODC opium survey conducted in Myanmar,⁴ the second largest illicit opium producer in the world, showed that the area under illicit opium poppy cultivation declined by a further 26 per cent, to 32,800 ha. Potential opium production was estimated at 312 tons (16 per cent less than in 2004). Thus, Myanmar currently accounts for 7 per cent of the illicit opium produced worldwide, down from 8 per cent in 2004 and close to a quarter of global production in 2000.

10. Approximately 193,000 households, or close to 1 million people, continue to be involved in opium poppy cultivation in Myanmar (a decline of 26 per cent over the previous year). There is, however, concern that the rapid eradication of opium poppy of the last few years could be undone if increasing poverty among farmers is not addressed.

11. The 2005 UNODC opium survey conducted in the Lao People's Democratic Republic⁵ indicated a further decline of 73 per cent in the area under opium poppy cultivation, which currently amounts to only 1,800 ha. The Lao People's Democratic Republic was the third largest illicit opium poppy producer in the world in 2000; only 14 tons of opium were estimated to be produced in that country in 2005. Notwithstanding, 270 villages, or 6,200 households, were still cultivating opium poppy in that country in 2005. Colombia, the Lao People's Democratic Republic, Mexico, Pakistan and other countries together account for the remaining 5 per cent of global illicit opium production.

12. In addition to eradication efforts in Afghanistan, the Lao People's Democratic Republic and Myanmar, reports on opium poppy eradication in 2004 were received from Colombia, India, Mexico, Pakistan, Peru, the Republic of Moldova and the Russian Federation. Seven other countries reported the eradication of opium poppy on areas totalling less than 100 ha.

2. Illicit manufacture of heroin

13. In 2004, heroin continued to be manufactured within Afghanistan's borders. The Afghan authorities reported having dismantled 125 illicit drug laboratories (including laboratories engaged in the production of cannabis resin). The precursor chemicals used in those illicit laboratories for the manufacture of heroin were reported to be from various countries in Asia, as well as Europe.

14. In South and South-East Asia, illicit laboratories manufacturing opiates were reported to have been dismantled by the authorities of the Hong Kong Special Administrative Region of China, India, Malaysia and Myanmar. In Europe, the illicit manufacture of opiates was reported in Belarus, the Republic of Moldova, the Russian Federation and Turkey. The authorities of Poland reported a decline in the detection of illicit "Polish heroin" laboratories, which, according to the authorities, may reflect a decrease in heroin manufacture and increased levels of illicit amphetamine manufacture and cannabis production. In the Americas, Colombia and Mexico reported having dismantled heroin laboratories.

C. Coca

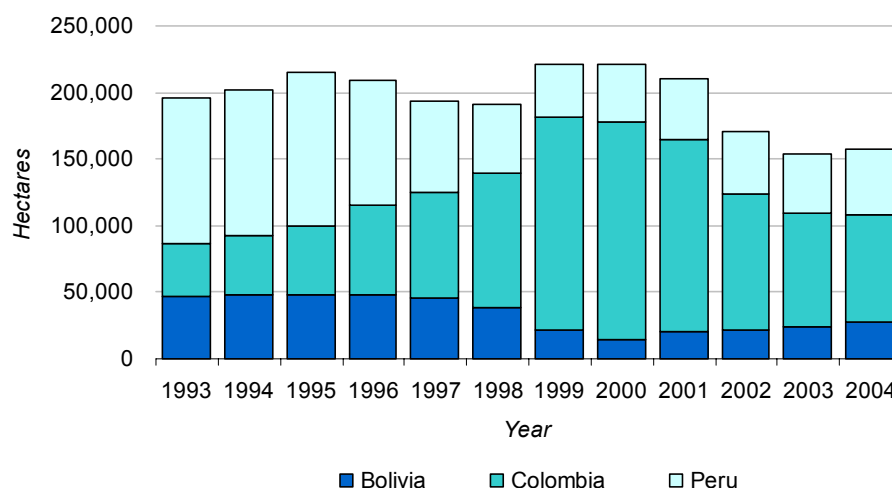
1. Illicit cultivation of coca bush and production of cocaine

15. The 2005 UNODC surveys of coca bush cultivation in the Andean countries (Bolivia, Colombia and Peru)⁶ showed that, following a decline for three consecutive years, illicit coca bush cultivation increased by 3 per cent to 158,000 ha in 2004. Coca bush cultivation in the Andean subregion as a whole has declined by 29 per cent since 2000, the last peak year of such cultivation. In Colombia, the area under coca bush cultivation has been reduced by more than 50 per cent in the last five years.

16. In 2004, coca bush cultivation in Colombia declined by 7 per cent to 80,000 ha. Such cultivation increased in Bolivia by 17 per cent to 27,700 ha, and in Peru by 14 per cent, to 50,300 ha. Colombia continues to account for 51 per cent of the coca bush cultivation in the world; that country is followed by Peru (32 per cent) and Bolivia (18 per cent) (see figure 3).

Figure 3

Global illicit coca bush cultivation, 1993-2004



17. Total potential production of dry coca leaf in the three Andean countries was estimated at 244,200 tons in 2004 (an increase of 3 per cent compared with 2003). The potential cocaine manufacture from that production was estimated at 687 tons (an increase of 2 per cent over 2003). In 2004, Colombia accounted for 56 per cent of global potential cocaine production, Peru 28 per cent and Bolivia 16 per cent (see figures 4-6).

Figure 4
Global potential cocaine manufacture, 1993-2004

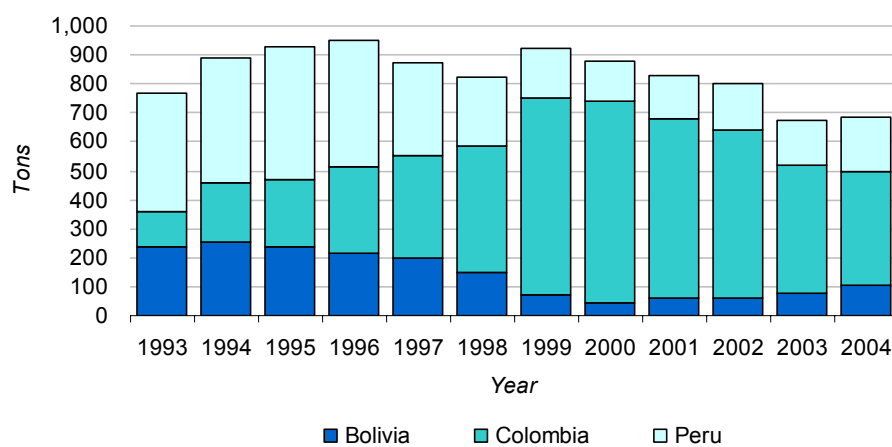


Figure 5
Potential cocaine manufacture as a percentage of global potential cocaine manufacture, Bolivia, Colombia and Peru, 2003
(N=674 tons)

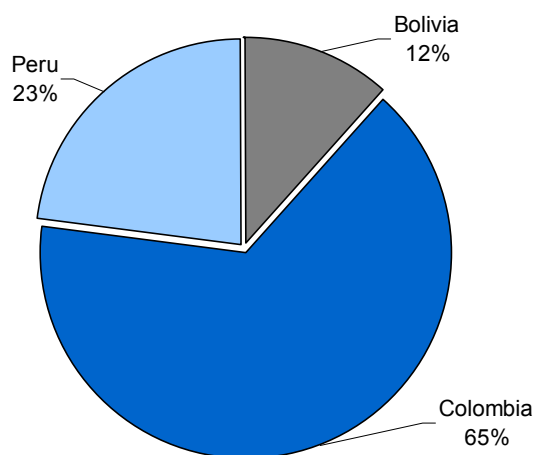
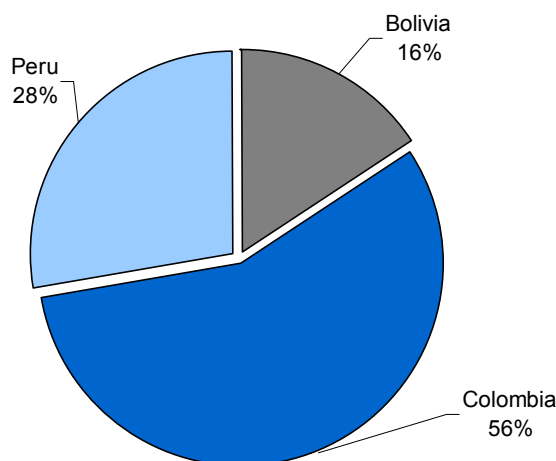


Figure 6
Potential cocaine manufacture as a percentage of global potential cocaine manufacture, Bolivia, Colombia and Peru, 2004
 (N=687 tons)



18. The reported cumulated spraying of coca bush in Colombia in 2004 amounted to 136,552 ha, while a further 2,589 ha of coca bush were eradicated manually. The decrease in coca bush cultivation in Colombia can be attributed to two main factors: aerial spraying and the implementation of alternative development projects. Long-term sustainability of eradication efforts will depend to a large extent on the real alternatives open to the farmers and to the non-displacement of coca bush cultivation into new and more remote areas of the country. Visual observations during verification flights showed a significant replanting rate for coca bush in 2004 in Nariño, the department accounting for about 18 per cent of the total area under illicit coca bush cultivation in Colombia in 2004.

19. Peru reported the eradication of 10,257 ha of illicit coca bush cultivation in 2004. The increase in coca bush cultivation was mostly in the Alto Huallaga area and in the remote area of San Gabán. In Bolivia, 8,437 ha of coca bush were eradicated, mostly in the Chapare area. In Bolivia, Colombia and Peru, coca bush cultivation continues to take place and has actually increased in areas that do not meet the ecological conditions for agriculture and should be protected or used exclusively for forestry activities.

2. Illicit manufacture of cocaine

20. A total of 8,196 illicit laboratories for processing coca-type substances were dismantled in 2004. That record-high number represents an increase of 21 per cent over the figure for the previous year. About 68 per cent of the laboratories detected and dismantled were in Bolivia, 22 per cent were in Colombia and 10 per cent were in Peru. Of the laboratories detected and dismantled in Bolivia, only four had been manufacturing cocaine hydrochloride. The bulk of the laboratories consisted of

facilities for producing coca paste and coca base: in Colombia, for example, 240 of the dismantled laboratories had been illicitly manufacturing cocaine and 1,556 had been producing coca paste and coca base; in Peru, 11 of the dismantled laboratories had been producing cocaine and 810 had been producing coca paste. The dismantling of illicit laboratories for processing coca-type substances was also reported in Argentina, the Hong Kong Special Administrative Region of China, Spain and the United States of America.

III. Global and regional trends in illicit drug trafficking, up to 2004

21. Figure 7 shows changes in illicit drug seizures at the global level in the 10-year period 1993-2004. Figures 8-13 compare changes at the global and regional levels in 2004 with the previous year. A detailed analysis of seizure patterns and trends per drug type is presented in the paragraphs which follow.

Figure 7

Changes in global drug seizures, 1993-2004

(Index: average for the period 1990-1992=100)

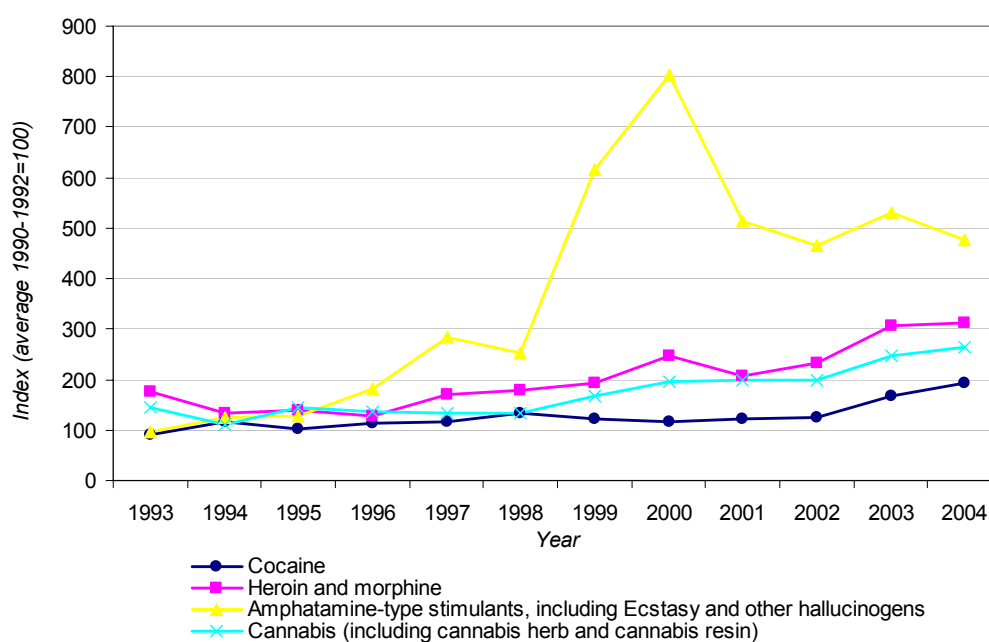


Figure 8
Changes in global drug seizures, 2003-2004
 (Percentage)

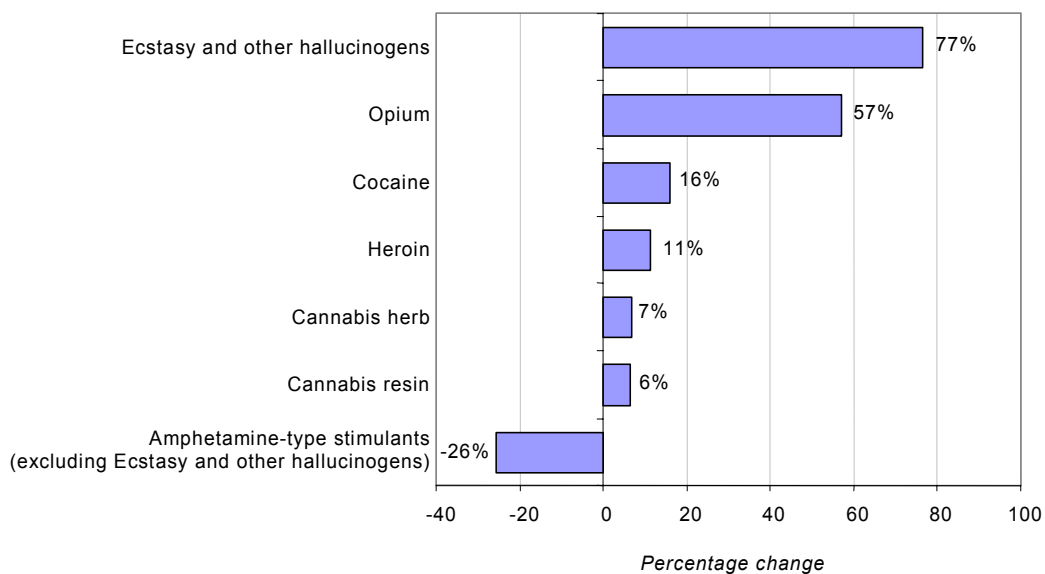


Figure 9
Changes in drug seizures in Africa, 2003-2004
 (Percentage)

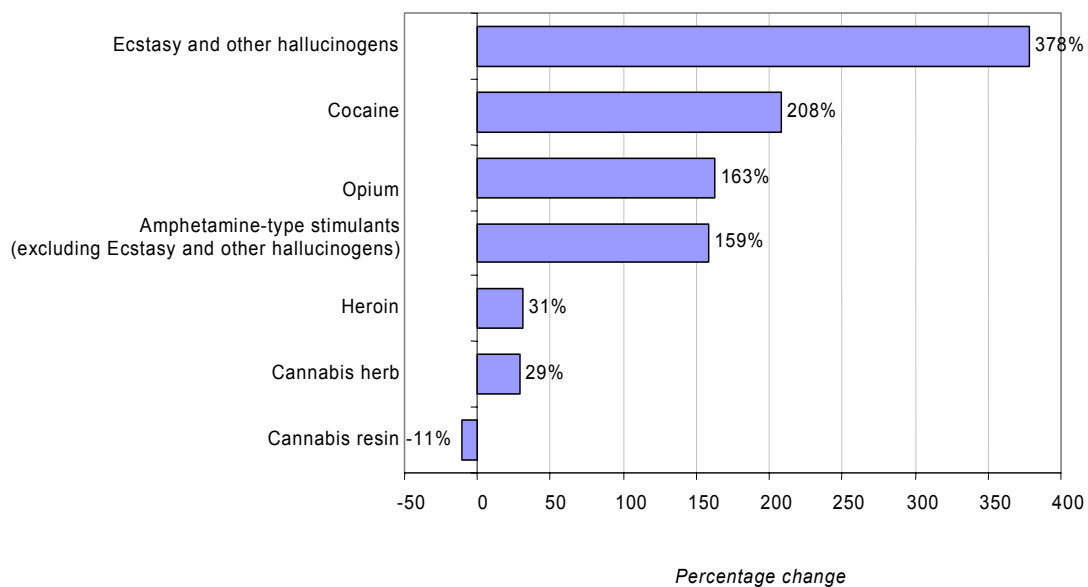


Figure 10
Changes in drug seizures in the Americas, 2003-2004
 (Percentage)

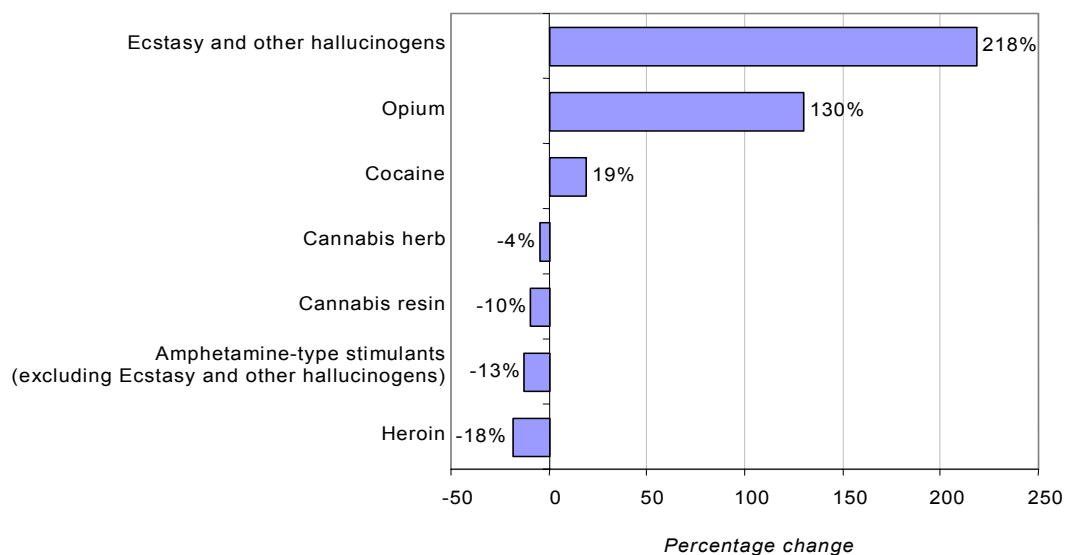


Figure 11
Changes in drug seizures in Asia, 2003-2004
 (Percentage)

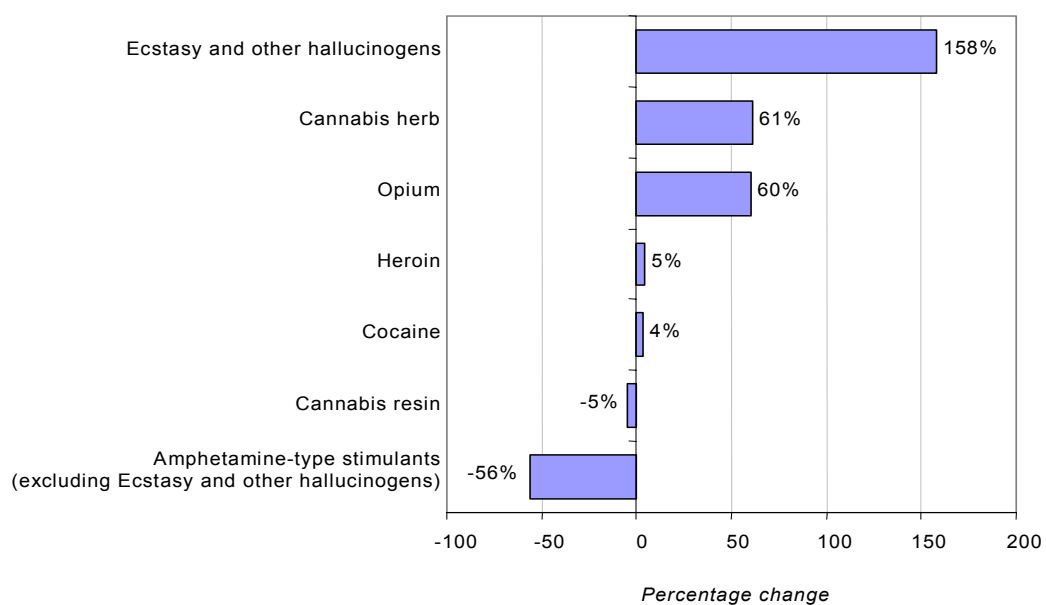


Figure 12
Changes in drug seizures in Europe, 2003-2004
 (Percentage)

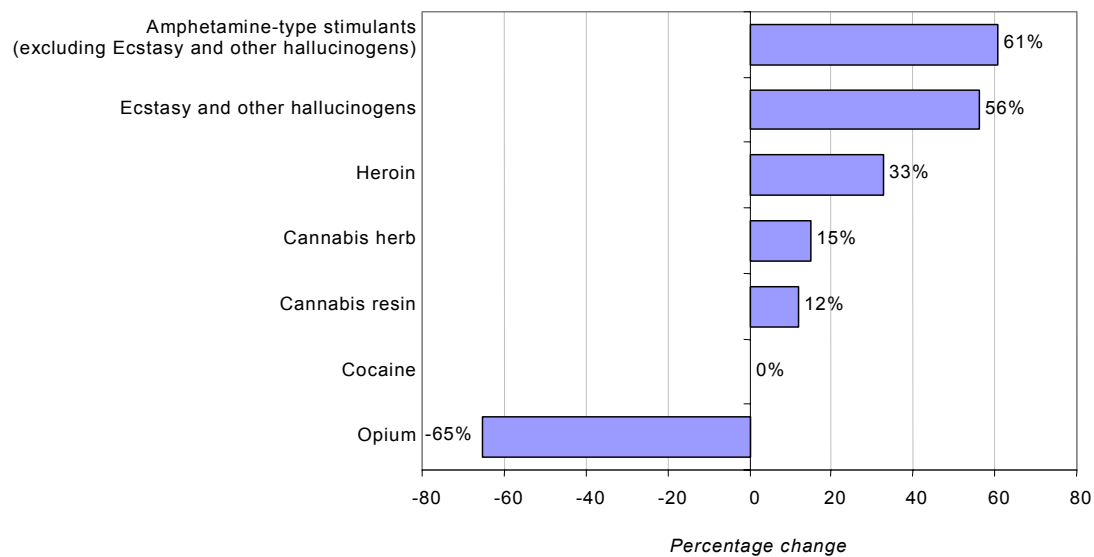
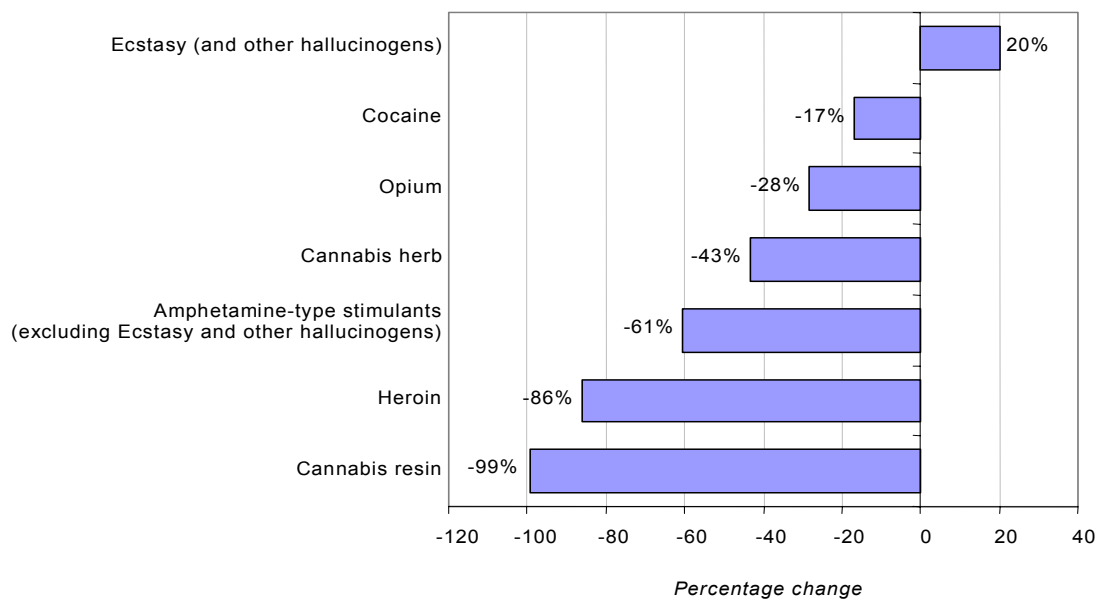


Figure 13
Changes in drug seizures in Oceania, 2003-2004
 (Percentage)



A. Cannabis

22. UNODC estimates that about 161 million people used cannabis in 2003 (an increase of 10 per cent over the previous year). The retail value of the global illicit market for cannabis herb (the largest illicit drug market) was estimated at \$113 billion in 2003. Considering wholesale levels, the cannabis herb market (\$29.7 billion) surpassed the export value generated by tobacco products. The cannabis resin market, ranked by value was fourth (cocaine and opiates were second and third).

23. The volume of global seizures of cannabis products has increased every year since the mid-1990s. The year 2004 saw another increase in global seizures of both cannabis herb and cannabis resin, which together accounted for two thirds of global seizures of all illicit drugs.

1. Cannabis herb

24. Global interdiction of cannabis herb increased by 7 per cent, to 6,240 tons, in 2004 (see figure 14). Africa and the Americas continued to account for the greater part of those seizures (see figure 15). In comparison with the previous year, the proportional share of seizures accounted for by African countries increased in 2004 from 26 per cent in 2003 to 32 per cent, while that of the Americas declined from 68 to 61 per cent. Although accounting for a small portion of the global total, seizures of cannabis herb increased in both Asia and Europe and declined in Oceania.

Figure 14

Global seizures of cannabis herb, 1993-2004
(Tons)

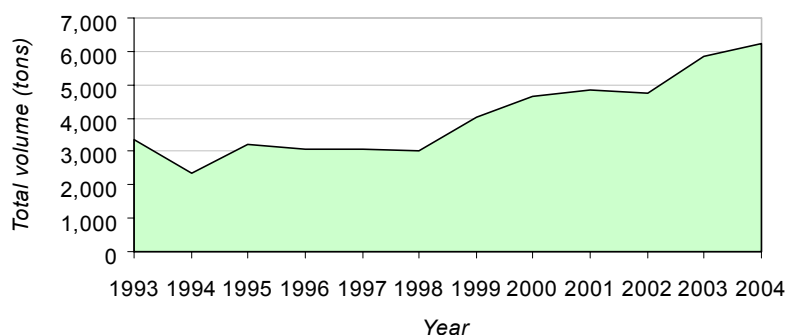
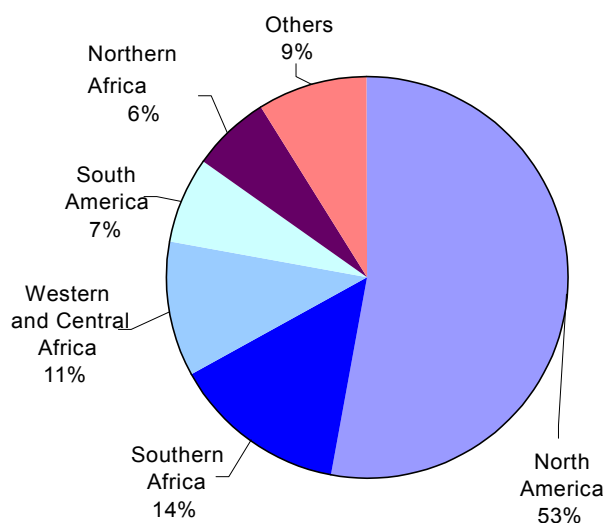


Figure 15
Breakdown of cannabis herb seizures by subregion, 2004
 (N=6,240 tons)



25. The largest quantity of cannabis herb seized worldwide was reported by Mexico (accounting for 35 per cent of the global total), followed by the United States (18 per cent). A significant increase in the volume of cannabis herb seizures was registered in Southern Africa (South Africa), Northern Africa (Egypt and Morocco) and Western Africa (Cameroon and Nigeria). In South America, Brazil and Colombia reported the largest volume of cannabis herb seizures. In Europe, the largest quantity of such seizures was reported by the Russian Federation; in Asia, the largest quantity was reported by India.

26. The cannabis herb seized in North America was mostly of domestic origin or had been imported from neighbouring countries in the region. Cannabis herb of Colombian origin was also reported to have been seized in the United States. This same largely intraregional pattern of trafficking was reported for seizures of cannabis herb in other regions. There were, however, some exceptions: for example, the Netherlands and Turkey reported having seized cannabis herb that had originated in Thailand. The Netherlands also reported having seized cannabis herb originating in Pakistan.

27. Countries in Western and Central Europe registered a slight increase in the number of cases involving trafficking in small quantities of cannabis through the postal system in 2004. While the majority of the cannabis herb is trafficked by road, there was an increase of 20 per cent in the number of countries reporting having seized during the same period cannabis herb that had been transported by sea.

2. Cannabis resin

28. Global seizures of cannabis resin increased for the third consecutive year to 1,470 tons in 2004 (6 per cent more than in the previous year) (see figure 16). The increase was mainly the result of increased seizures in Europe, in particular South-

Eastern Europe. In most of the other regions, the exceptions being South America and the Caribbean, less cannabis resin was seized in 2004. As with cannabis herb, the bulk of seizures are concentrated in a few subregions (see figure 17).

Figure 16
Global seizures of cannabis resin, 1993-2004
(Tons)

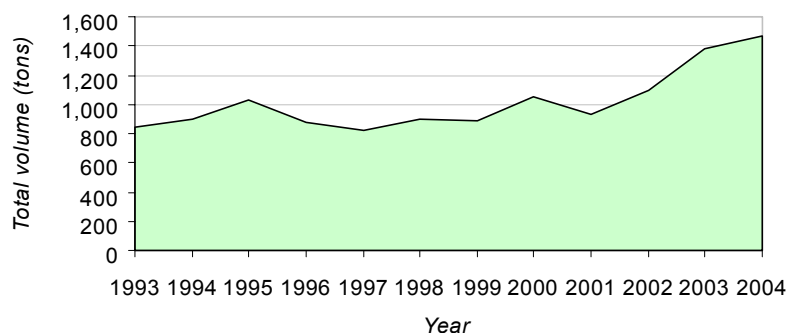
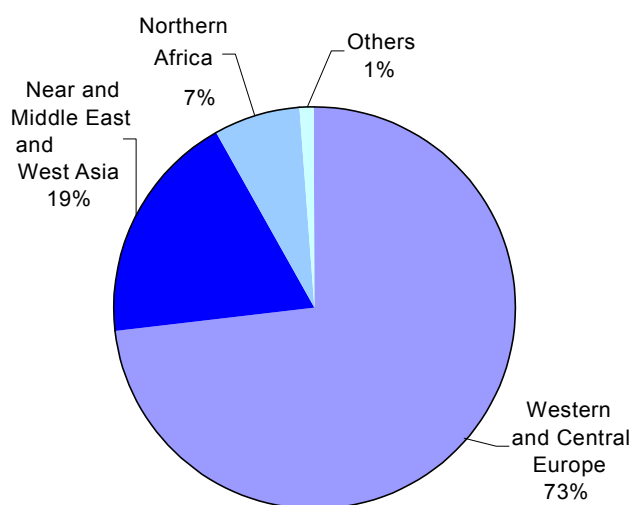


Figure 17
Breakdown of cannabis resin seizures by subregion, 2004
(N=1,470 tons)



29. As has been the situation in previous years, the largest volume of cannabis resin seized worldwide was reported by Spain (54 per cent of the global total), followed by Pakistan and France (which accounted for the second largest volume seized in Europe). Other countries reporting a large volume of such seizures were (in descending order of the total quantities seized) Morocco, the Islamic Republic of Iran, Afghanistan, Belgium and Portugal.

30. Seizures of cannabis resin increased significantly (though from relatively low levels) in countries in Eastern and South-Eastern Europe, South America and the Caribbean. The largest volumes seized in their respective subregions were reported by the Russian Federation, Turkey, Paraguay and Jamaica.

31. Large-scale production of cannabis resin is concentrated in Morocco, Pakistan and Afghanistan. In 2004, 26 countries (compared with 32 in 2003) were reported by at least one other country to be source countries for cannabis resin. Morocco continues to be the most important source country for the cannabis resin smuggled into Europe. After Morocco, the following countries (listed in descending order) were the most frequently cited as sources of cannabis resin: Spain, Netherlands, Jamaica and Afghanistan.

32. After reaching the European continent, cannabis resin is most often trafficked by road. In 2004, there were also reports of seizures of cannabis resin in sea containers in ports in Belgium. In West Asia, cannabis resin leaving Afghanistan was reported to be transported not only in vehicles but also in convoys of animals, often following the same trafficking routes used for opiates.

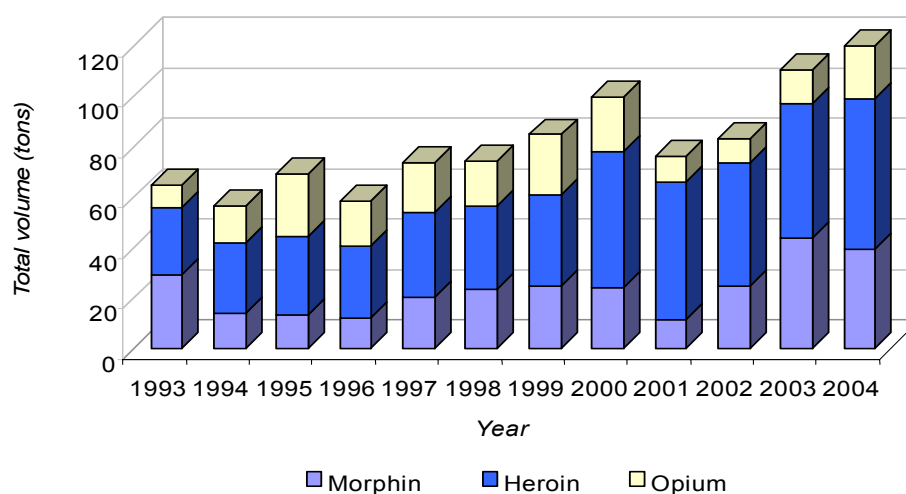
B. Opiates

33. Notwithstanding the exceptional increases in the abuse of amphetamine-type stimulants (ATS) and of cannabis products in the last few years, opiates (notably heroin), followed by cocaine, remain the principal problem drugs in the world, as reflected in demand for drug abuse treatment. In *World Drug Report 2005*,⁷ UNODC estimated that the number of opiate abusers had risen slightly to around 16 million (11 million of whom abuse heroin). That increase is mainly a reflection of the increase number of opiate abusers in Asia (8.5 million).

34. Opiates constituted the third largest illicit drug market in 2003 (after cannabis herb and cocaine), valued at \$65 billion at the retail level. When wholesale prices are considered, the market for opiates is estimated at about \$21 billion, an amount higher than the global export value of certain agricultural commodities such as wheat.

35. Global seizures of opiates (the combined seizures of heroin, morphine and opium), expressed in heroin equivalent,⁸ increased in 2004 for the third consecutive year to 120 tons (an increase of 8 per cent compared with 2003). Seizures of opium increased by 57 per cent to 210 tons (or 21 tons in heroin equivalent). The total volume of heroin seized was 11 per cent higher in 2004, reaching 59.2 tons, a record-high level. Morphine seizures declined by 10 per cent, to 39.3 tons, in 2004 (see figure 18).

Figure 18
Global seizures of opiates, 1993-2004
 (Tons)



36. The share of global seizures of all illicit drugs accounted for by opiate seizures remained stable at 9 per cent in 2004. However, that share has declined in recent years as a result of increases in the share of seizures of cannabis and cocaine. Calculated in terms of consumption units, opiates continued to be the second most seized drugs in South-West Asia, after cannabis resin. In East and South-East Asia, seizures of opiates were higher than seizures of all other most seized drugs in 2004, surpassing seizures of methamphetamine. Seizures of opiates continued to be higher than most seizures of other drugs in Central Asia and in South-Eastern Europe.

37. The most significant increase in seizures of opiates is attributable to opium seizures which reached the level of the period prior to 2001, the year in which the Taliban regime in Afghanistan banned opium. Countries in South-West Asia continued to account for the bulk of opium seizures (95 per cent of the world total). The Islamic Republic of Iran seized the largest volume of opium (accounting for 83 per cent of global seizures of opium); it was followed by Afghanistan (10 per cent of global seizures). The volume of opium seizures also increased in West, Central and South Asia. In South-East Asia, opium seizures declined, reflecting a sharp decline in opium poppy cultivation in the subregion.

38. After the record-high level of seizures in 2003, the volume of morphine seized worldwide declined by 10 per cent, to 39.3 tons, in 2004. The bulk of those seizures continued to be effected in Pakistan (accounting for 54 per cent of the world total) and the Islamic Republic of Iran (33 per cent of the world total). Seizures of morphine in Turkey rose again in 2004, accounting for 12 per cent of the world total.

Heroin trafficking and seizure trends

39. In 2004, global seizures of heroin reached another record-high level: 59.2 tons, or 11 per cent more than in the previous year (see figure 19). The regional

distribution of seizures indicates a slight decline in the share accounted for by countries in Asia and in the Americas and an increase in the share accounted for by countries in Europe (see figure 20).

Figure 19
Global seizures of heroin, 1993-2004
(Tons)

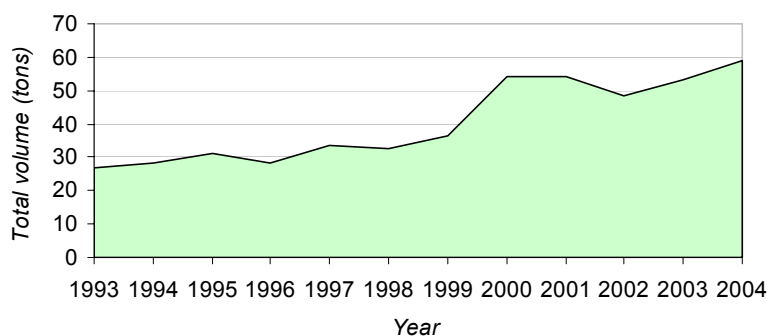
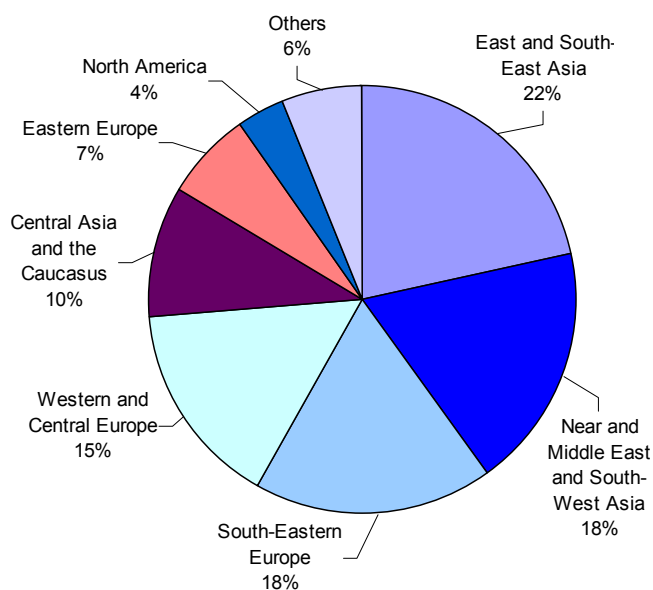


Figure 20
Breakdown of heroin seizures by subregion, 2004
(N=59.2 tons)



40. The most significant increase in heroin seizures (33 per cent) was registered in Europe. In 2004, for the first time, the volume of heroin seizures in South-Eastern Europe surpassed the volume in Western and Central Europe. Heroin seizures remained stable in Asia as a whole (an increase of 5 per cent). At the subregional

level, heroin seizures increased in East and South-East and in South Asia, remained stable in West Asia and declined in Central Asia. Preliminary data for 2005 indicate another decline in heroin seizures in the countries of Central Asia (with the exception of Kazakhstan), large volumes of heroin seizures in Turkey and a twofold increase in heroin seizures in Pakistan.

41. In 2004, heroin seizures declined in the Americas and in Oceania. In Africa, as a whole, heroin seizures increased (though from relatively low levels). The world's subregions with the sharpest increases in heroin seizures were, in descending order of the percentage increase, Western Africa, South-Eastern Europe, Eastern Europe, Eastern Africa and East and South-East Asia.

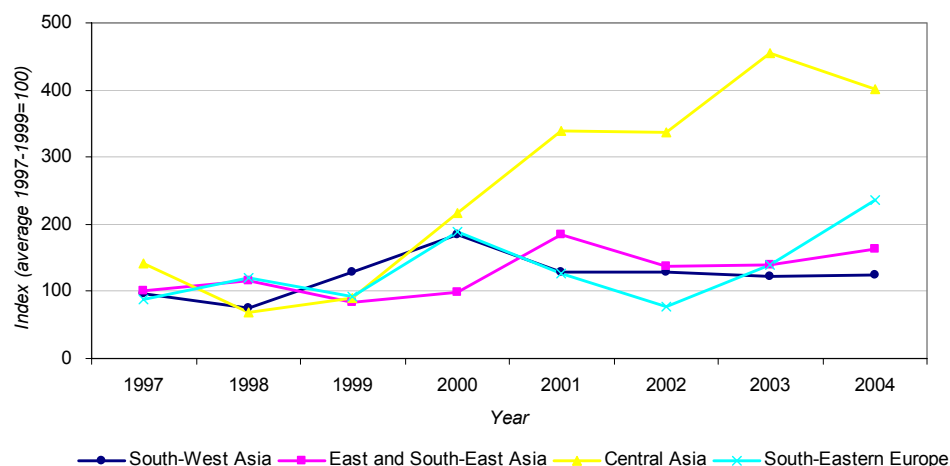
42. In 2004, the largest volume of heroin seized worldwide was again reported by China (10.8 tons, or 18 per cent of the global total); that country was followed by Turkey (accounting for 15 per cent of the global total), the Islamic Republic of Iran (8 per cent), Tajikistan (8 per cent), the Russian Federation (7 per cent) and Pakistan (6 per cent). In all the above-mentioned countries except Pakistan and Tajikistan, the volume of heroin seizures increased in 2004 compared with the volume in the previous year.

43. According to the data available to UNODC at the time that the present report was being prepared, the largest volume of heroin seized in Western and Central Europe was reported by Italy (2.5 tons, or 4 per cent of the global total). In the Americas, the largest volume of heroin seized was reported by the United States, followed by Colombia; and in Africa the largest volume was seized in Nigeria, followed by Ghana.

44. The seizure data for 2004 indicate that traffickers have heavily targeted the Islamic Republic of Iran and countries along the Balkan route. Despite the significant increase in seizures of heroin in South-Eastern Europe (see figure 21), the bulk of the heroin seized in Western and Central Europe had been smuggled through that subregion. However, the Netherlands was the country most often cited as the transit country used for heroin consignments seized in Western and Central Europe. Turkey and the Russian Federation were the next most often cited transit countries.

45. Seizures of heroin originating in South-East Asia were reported by only three countries in Europe: Czech Republic, Luxembourg and Norway. Estonia, Ireland and Latvia reported having seized heroin that had been smuggled through Central Asia. Heroin bound for illicit markets in Europe and North America was also reported to have been seized in countries in Eastern Africa, Western Africa, the Caribbean, Central America and South America.

Figure 21
**Changes in heroin seizures in the areas of the main trafficking routes,
 1997-2004**
 (Index: average for the period 1997-1999=100)



46. In East and South-East Asia, the volume of heroin seizures again peaked, but at a level lower than the record level of 2001. The authorities of China reported that Myanmar was the source country and that Australia, Canada and the United States were the destinations of heroin consignments that had been seized on Chinese territory. A significant increase in heroin seizures was also registered in Malaysia, Myanmar and Thailand. In Oceania, reports on heroin seizures were received from only Australia and New Zealand; those reports indicated a significant decline in such seizures in those two countries.

47. Colombia continued to be the main source country of heroin seized in the Americas. Heroin seized in the United States was reported to have originated in Afghanistan, Colombia and Mexico. In Canada, more than half of the seized heroin originated in South-West Asia and 25 per cent originated in Latin America.

48. As regards the modus operandi used by heroin traffickers, road transport continued to be the most frequently used means of smuggling for large quantities of heroin. In 2005, Tajik border guards seized for the first time heroin that had been transported from Afghanistan using a motorized parachute. In 2004, the authorities in Myanmar seized in the State of Mon more than half a ton of heroin that was being transported by boat.

49. The increase in seizures of opiates in recent years, the preliminary data available for 2005 and the situation in respect of illicit opium poppy production in Afghanistan all suggest that a significant decline in heroin manufacture and trafficking is unlikely to occur in the near future.

C. Cocaine

50. There are an estimated 14 million cocaine abusers worldwide, two thirds of whom reside in the Americas. The United States continues to be the world's largest cocaine market, although one quarter of all the cocaine abusers in the world are in Europe.

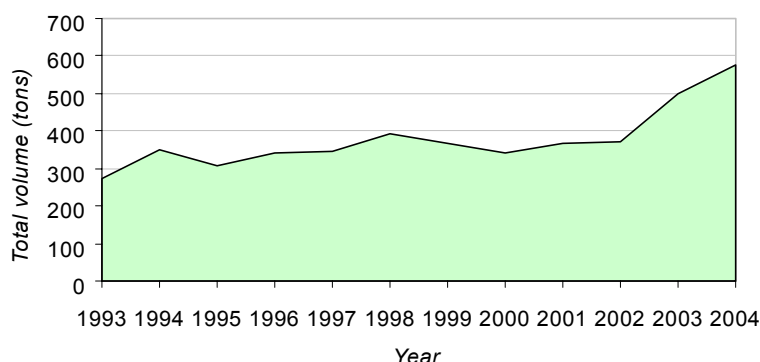
51. In 2003, cocaine constituted the second largest illicit drug market (after cannabis herb), valued at \$70.5 billion at the retail level. The value of the cocaine market at the wholesale level is estimated to be \$18.8 billion, an amount higher than the global revenues generated by the export of coffee and chocolate products together.

Cocaine trafficking and seizure trends

52. In 2004, global seizures of cocaine increased for the fourth consecutive year, reaching another record-high level of 578 tons (an increase of 16 per cent over 2003) (see figure 22). Cocaine continued to be the second most seized drug in the world (after cannabis products), accounting for 16 per cent of all drug seizures. Cocaine was the most seized drug in South America and Central America and the second most seized drug in North America, Western and Central Europe and Eastern Africa.

Figure 22

Global seizures of cocaine, 1993-2004
(Tons)



53. In the Americas, North America registered the largest increase in cocaine seizures: 41 per cent. Cocaine seizures remained stable at a high level in Europe, stable at a low level in Asia and declined in Oceania. In Africa, however, cocaine seizures increased twofold but from a relatively low level. The subregions with the sharpest increase in cocaine seizures in 2004 were, in descending order of the percentage increase, Eastern Africa, Western Africa, Eastern Europe and North America.

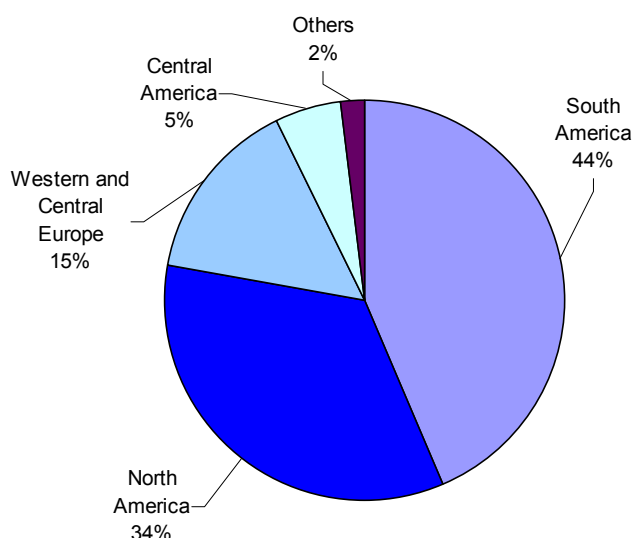
54. The largest volume of cocaine seized worldwide was once again reported by Colombia (188 tons), followed by the United States (166 tons). Cocaine seizures in those two countries together accounted for 62 per cent of the world total. Western and Central Europe accounted for 15 per cent of global cocaine seizures (compared

with 17 per cent in the previous year) (see figure 23). The largest volume of cocaine seized in Europe was once again reported by Spain (33 tons, or 6 per cent of the global total), followed by the Netherlands (21.4 tons).

Figure 23

Breakdown of cocaine seizures by subregion, 2004

(N=578 tons)



55. Cocaine seizures increased significantly (but from a relatively low level) in Eastern and Western Africa. The largest volume of cocaine seized in Africa was reported by the following countries (listed in descending order according to the quantity seized): Kenya, Ghana, South Africa, Togo and Nigeria. In Oceania, only Australia, New Zealand and the Marshall Islands reported cocaine seizures: the volume of such seizures declined in Australia, but increased in New Zealand. In Asia, Japan reported the largest volume of cocaine seizures.

56. The authorities of Colombia reported that the prices of illicit drugs in that country increased in 2004. In the case of cocaine, it is possible that the increase in price was a reflection of supplies diminishing as a result of strengthened government efforts to combat illicit cocaine manufacture and trafficking. In Colombia and Peru, there was an increase in 2004 (compared with the previous year) in the proportion of cocaine consignments intercepted while being transported on roadways. That may be an indication that traffickers have diversified their modus operandi to reduce costs and losses incurred through strengthened maritime law enforcement efforts. Of considerable concern are reports from the authorities of Bolivia indicating that children as young as 12 years of age are increasingly being used as “mules” or “drug swallows”, swallowing small packets of cocaine in order to smuggle them across the country.

57. In 2004, most of the cocaine seized in Brazil continued to be of Colombian origin, and more than half of the cocaine seized had been destined for countries in Europe, 30 per cent for the United States and 10 per cent for countries in Asia.

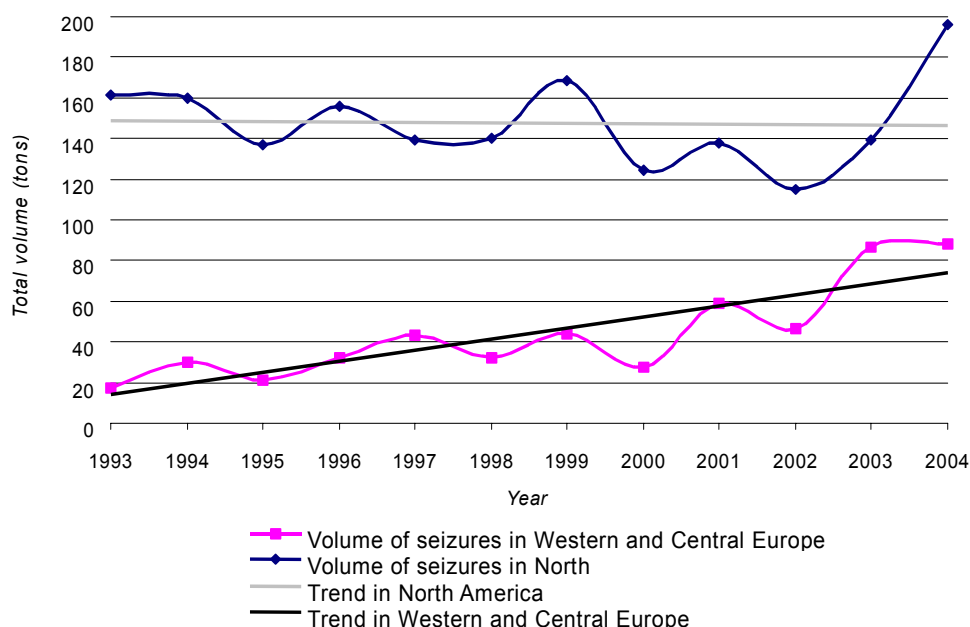
Similarly, Argentina reported that half of the cocaine seized had been destined for Europe, 20 per cent for the United States and 30 per cent for domestic consumption.

58. Countries in Central America, Western Africa and Eastern Africa continued to be used as transit countries by cocaine trafficking syndicates. In Central America, seizures of cocaine declined only slightly in 2004 (to 30 tons compared with 31.8 tons in 2003). In 2004, Panama was again the country in the subregion in which the largest volume of cocaine was seized (7 tons). The most significant increase in cocaine seizures in Central America was registered in Nicaragua (6.2 tons). Cocaine seizures in the Caribbean declined by half in 2004. That seizure pattern indicates that in 2004, cocaine traffickers targeted countries in Central America more than in the Caribbean. This is also confirmed by the fact that cocaine seizures increased in Mexico.

59. In Europe, cocaine seizures remained stable at a high level (see figure 24). This is the net result of declining cocaine seizures in Spain and significant increases in such seizures in 23 other countries, including Belgium, France, Greece, Italy, Portugal, Turkey, the Netherlands, the Russian Federation, Switzerland and Ukraine. The authorities of the Netherlands reported that a number of cocaine consignments had followed unusual routes before being intercepted in that country. On occasion, both cocaine and heroin seized by the authorities of the Netherlands had been transported via South-Eastern Europe and Northern Africa. Nigeria, Togo and Zambia also reported having seized cocaine destined for Europe. The countries most often cited as having been used as transit countries for cocaine consignments seized in Europe were, in descending order, the Netherlands, Spain, France, the Bolivarian Republic of Venezuela and Germany.

60. Seizure data indicate that the availability of cocaine on illicit markets throughout the world has not declined. The sustained high level of cocaine seizures (also reflected in seizure statistics for 2005) indicates the continuation of illicit activity involving cocaine in the near future and possibly the spread of cocaine to new markets.

Figure 24
Cocaine seizures in North America and Western and Central Europe, 1993-2004



D. Amphetamine-type stimulants⁹

61. UNODC has estimated that about 26 million people abused methamphetamine, amphetamine or related substances in 2003, while about 7.9 million abused Ecstasy. Almost two thirds of the world's amphetamine and methamphetamine abusers reside in Asia; the majority in East and South-East Asia are methamphetamine abusers. Prevalence of use, however, is highest in Oceania and third highest in North America. In the latter markets, methamphetamine is also the predominant ATS that is abused. In Europe, amphetamine abuse is more common than methamphetamine abuse. The abuse of Ecstasy continues to be concentrated in Europe (mostly in Western and Central Europe) and in North America.

62. UNODC has estimated the value of the global illicit market for ATS at the retail level at \$44 billion per year, the breakdown being \$28 billion for amphetamines and \$16 billion for Ecstasy, including methylenedioxymethamphetamine (MDMA) and related substances. Thus, the value of the illicit market for ATS is less than that of the illicit markets for cannabis herb, cocaine and opiates, but greater than the illegal proceeds generated by cannabis resin. At the wholesale level, the global illicit market for amphetamines and Ecstasy together is estimated at \$14.5 billion. That is only slightly less than the global revenues generated by wheat exports in 2003.

1. Illicit manufacture of amphetamine-type stimulants

63. The illicit manufacture of amphetamines (mostly methamphetamine) is concentrated in East and South-East Asia, North America and, to a lesser extent, Europe. China (followed by the Philippines and Myanmar) has dismantled the largest number of illicit methamphetamine laboratories in East and South-East Asia in recent years. In terms of output, the level of manufacture appears to be of similar magnitude in China and Myanmar, though manufacture in the Philippines is estimated to have increased in recent years. The Hong Kong Special Administrative Region of China and Malaysia also reported having dismantled illicit ATS laboratories in 2004.

64. In the Americas, the principal country used for the illicit manufacture of methamphetamine is the United States, followed by Mexico and Canada. The United States continues to be the country in which the largest number of illicit methamphetamine laboratories are dismantled worldwide: 9,323 illicit methamphetamine laboratories were dismantled in that country in 2003 and a record number of 17,171 such laboratories were dismantled in 2004.

65. In Australia, 358 ATS laboratories were dismantled between 2003 and 2004, while New Zealand reported having dismantled 182 laboratories in 2004. In Europe, illicit methamphetamine manufacture is largely limited to the Czech Republic. However, in 2004, the Republic of Moldova and Slovakia also reported having dismantled illicit methamphetamine laboratories.

66. The main source countries of illicitly manufactured amphetamine are in Western and Central Europe (the Netherlands, Poland and Belgium). Bulgaria, Estonia and Lithuania also play a significant role in the illicit manufacture of amphetamine. A total of 195 illicit laboratories were reported dismantled in Europe in 2004 (up from 144 in the previous year). The Russian Federation accounted for the largest number of those dismantled laboratories (141). Outside Europe, illicit amphetamine manufacture takes place primarily in North America and in Oceania. In the United States, 124 laboratories illicitly manufacturing amphetamine were dismantled in 2004 (up from 10 in the previous year).

67. Illicit manufacture of ATS continues to be limited in Africa and South America; in South Africa, however, the detection and dismantling of facilities used for the clandestine manufacture of ATS (methcathinone and methamphetamine) have increased in recent years. In both Africa and South America, the illicit market for stimulants appears to be supplied mostly by the diversion of pharmaceuticals from licit channels.

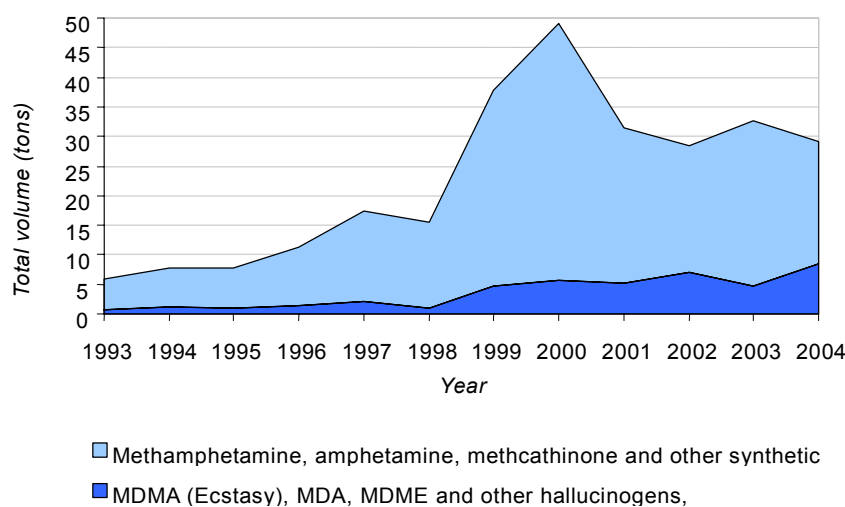
68. Facilities for the illicit manufacture of Ecstasy continue to be located mainly in European countries. The main source countries of illicitly manufactured Ecstasy are the Netherlands and Belgium. Other countries in Europe that reported having dismantled Ecstasy laboratories in 2004 were Estonia, Norway and Spain. Countries outside Europe that are sources of illicitly manufactured Ecstasy include (in descending order) the United States, Canada, China, Indonesia and South Africa. In North America, the number of dismantled Ecstasy laboratories increased substantially in 2004. The Netherlands continued to be the country most often cited as the source of Ecstasy seized worldwide. It was cited by 80 per cent of the reporting countries in 2004.

2. Trafficking and seizure trends involving amphetamine-type stimulants

69. Amphetamine-type stimulants (including Ecstasy and other hallucinogens) accounted for the largest increase in seizures in the last decade. After reaching a record-high level in 2000, global seizures declined in both 2001 and 2002 and increased in 2003, only to decline again by 10 per cent, to 29.2 tons, in 2004 (see figure 25). Methamphetamine continued to account for the greater part of those seizures: however, its proportional share fell from 66 per cent in 2003 to 38 per cent in 2004. The proportion of ATS seizures accounted for by the other synthetic drugs were as follows: Ecstasy, 29 per cent; amphetamine, 20 per cent; and unspecified ATS, 13 per cent.

Figure 25

Global seizures of amphetamine-type stimulants, 1993-2004

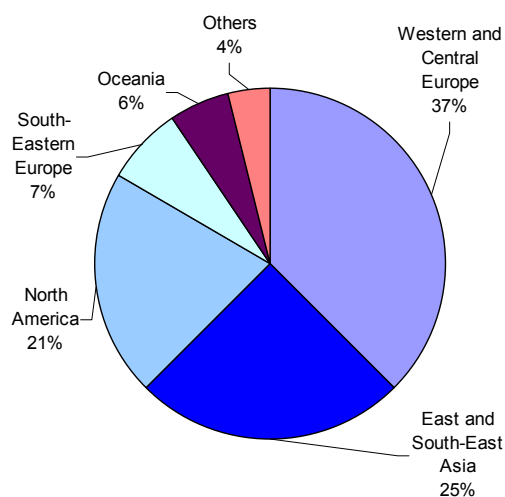


70. In 2003, seizures of amphetamines (amphetamine and methamphetamine) increased and seizures of Ecstasy declined. In 2004, the opposite occurred. The subregional distribution of seizures of ATS (including Ecstasy) in 2004 show a marked decline in the share of those seizures accounted for by countries in East and South-East Asia (from an average of 60 per cent between 2000 and 2003 to 25 per cent in 2004). That was the result not only of declining methamphetamine seizures in that subregion, but also of increases in other parts of the world, in particular in Western and Central Europe, South-Eastern Europe and North America (see figure 26).

Figure 26

Breakdown of seizures of amphetamine-type stimulants including Ecstasy and other hallucinogens, by subregion, 2004

(N=29.2 tons)

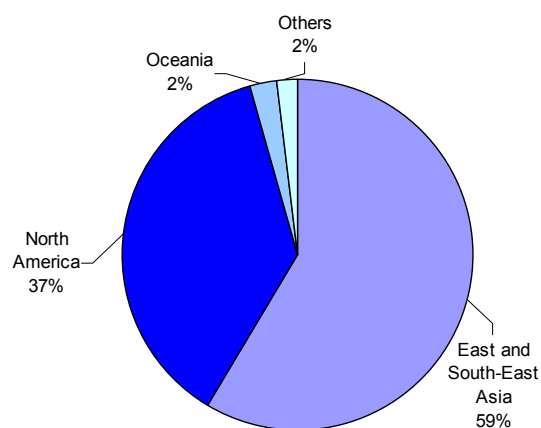
*(a) Methamphetamine*

71. Methamphetamine seizures declined by one half, to 11 tons, in 2004. Countries in East and South-East Asia continued to account for the majority of global methamphetamine seizures; those countries were followed by countries in North America (see figure 27). In other parts of the world only relatively small quantities of methamphetamine were reported seized. Western and Central Europe was the only subregion in which seizures of methamphetamine increased from previous low levels.

Figure 27

Breakdown of methamphetamine seizures by subregion, 2004

(N=11 tons)



72. Over the period 1999-2003, the largest volume of methamphetamine seizures was reported by China, followed by Thailand and the United States. In 2004, the United States seized a total of 3 tons of methamphetamine and thus surpassed, for the first time, the volume seized in China (2.8 tons). Other countries seizing a large volume of methamphetamine were (listed in descending order according to the quantity seized) Thailand, Mexico, the Philippines, Japan, Australia and the Lao People's Democratic Republic.

73. The methamphetamine seized in South-East Asia originated in countries in the subregion, namely China, Myanmar, the Philippines and Thailand. In North America and Oceania, the methamphetamine seized had been mostly domestically produced. The authorities in Australia reported that an increased volume of purer forms of methamphetamine commonly called "ice" had been imported.

74. In the United States, there was a decline of 20 per cent in methamphetamine seizures in 2004.

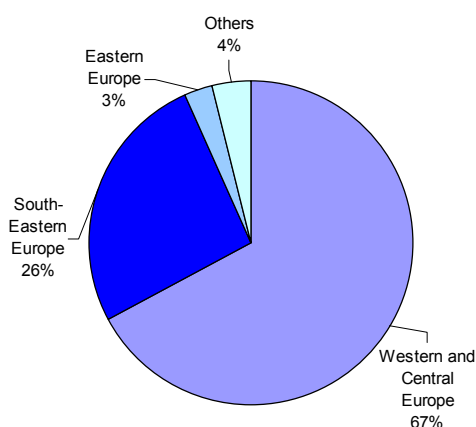
(b) *Amphetamine*

75. After a significant increase in 2003, global amphetamine seizures increased by 5 per cent, to 6 tons, in 2004. In addition, 3.7 tons of non-specified ATS (that is, ATS not specified by the reporting countries as amphetamine, methamphetamine or Ecstasy) were reported seized worldwide. The majority of those seizures was reported by countries in Europe, which suggests that a large proportion of the ATS seized is likely to be amphetamine.

76. As with heroin seizures, the trend in amphetamine seizures in South-Eastern Europe suggests an increase in trafficking (particularly in Bulgaria). That trend is also reflected in the subregional distribution of amphetamine seizures: South-Eastern Europe accounted for over one fourth of the global amphetamine seizures in 2004 (compared with 11 per cent in the previous year). Countries in Western and Central Europe continued to account for the bulk of those seizures (see figure 28). Only a relatively small volume of amphetamine seizures was reported by countries in other subregions.

Figure 28

Breakdown of amphetamine seizures by subregion, 2004
(N=6 tons)



77. The largest volume of amphetamine seizures worldwide in 2004 was reported by Bulgaria (1.5 tons),¹⁰ followed by seizures in the Netherlands and Germany. The main source country of amphetamine seized in Europe continued to be the Netherlands, followed by Poland, Lithuania and Belgium. However, a number of other countries were also cited by at least one other country as source countries. Norway and Sweden were the most often cited intended destinations of amphetamine seized before being smuggled into other countries.

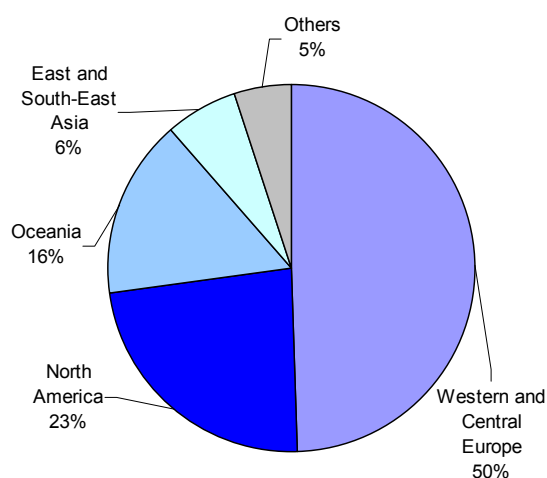
(c) *Ecstasy-type substances*

78. After a significant decline in seizures of Ecstasy and other hallucinogens in 2003, record-high volume of 8.5 tons of such drugs was reported in 2004 (an increase of 77 per cent over 2003), increased seizures being reported in all regions. In 2004, the bulk of Ecstasy seizures continued to be effected in Western and Central Europe, followed by North America, Oceania and East and South-East Asia. In other parts of the world, despite increased seizures, the volume of Ecstasy seized was comparatively small (see figure 29).

79. Canada, followed by Belgium, Australia and the Netherlands reported the largest volume of Ecstasy seized in 2004. Those four countries together accounted for two thirds of global Ecstasy seizures. In early 2005, Australia seized over 1.2 tons of Ecstasy-type substances—one of the world's biggest single seizures of Ecstasy.

Figure 29

Breakdown of seizures of Ecstasy and other hallucinogens by subregion, 2004
(N=8.5 tons)



80. Trafficking in Ecstasy continued to be largely intraregional in Europe and interregional outside Europe, as European countries continue to be the main production location. The main source countries were the Netherlands (cited by 80 per cent of reporting countries) and Belgium. Germany was the most often cited transit country for Ecstasy seizures in Europe. The countries most often cited as originally intended destinations of Ecstasy consignments seized in the period 2003-

2004 were the United States, followed by Australia, the United Kingdom, Italy and Norway.

81. China accounted for more than half of the Ecstasy seizures in East and South-East Asia. In addition, a relatively large volume of Ecstasy was seized in (listed in descending order according to the volumes seized) Indonesia, Japan, the Hong Kong Special Administrative Region of China and Thailand.

E. Other drugs

82. In the period 2003-2004, seizures of methaqualone continued to be concentrated in India and South Africa. In 2004, the total volume of such seizures increased by 63 per cent, to 4.8 tons. As regards seizures of depressants other than methaqualone, a record-high quantity of 20.5 tons, accounting for 95 per cent of the world total, was reported to have been seized by the Russian Federation in 2004. The United States, Japan and Mexico also reported seizures of such depressants exceeding 100 kg. A total of 55 countries reported on seizures of depressants in the same period.

IV. Conclusion

83. Renewed and strengthened effort is needed if all Member States are to meet the goals set by the General Assembly at its twentieth special session, in 1998, in respect of reducing the supply and demand for illicit drugs.

84. Developments in 2005 in Afghanistan, where illicit opium poppy cultivation has dropped sharply in some parts of the country but increased even more dramatically in others, confirm that there is no easy solution to the problem of illicit drug crop cultivation. However, the Government of Afghanistan and the international community need to work together towards providing legitimate and viable economic alternatives for the poor, whose livelihood currently depends on illicit drug crop cultivation, while, at the same time, reinforcing the rule of law in the country.

85. The Governments of Myanmar and Lao People's Democratic Republic and the international community need to address the growing poverty in rural areas in order to avoid a situation where the progress achieved in reducing illicit opium poppy cultivation is jeopardized.

86. In the Andean countries, despite enormous progress in reducing illicit coca bush cultivation in recent years, the results of the latest coca survey showed that the situation is far from being resolved. In addition to the disruptions to the social fabric and the economic and health problems caused by the illicit drug economy, the environmental concerns associated with illicit crop cultivation require immediate attention and action from the States affected and the international community. Moreover, the increases in illicit crop cultivation in both Bolivia and Peru call for concerted regional action in respect of supply reduction efforts.

87. The spread of illicit cannabis plant cultivation in often already impoverished countries and the related growing numbers of cannabis users worldwide also require action by the countries concerned and support from the international community.

88. The 2005 study carried out by UNODC in Western Africa¹¹ addressed, among other things, the problems faced by transit countries. In Western Africa, drug trafficking and fraud were found to figure prominently among the types of illegal activities in which criminal groups are involved in the subregion. That makes the subregion vulnerable to the overt influence of organized criminals and potential destabilization. Greater political will to back police reforms, to support effective forms of regional and international cooperation and to curb corrupt practices are essential to effectively act against those problems.

89. The increased rates of success of law enforcement agencies worldwide in seizing illicit narcotic drugs and psychotropic substances are welcome developments. However, increased drug seizures might also be an indication of increased drug production and trafficking. Close international cooperation is still needed to ensure greater exchange of information between drug law enforcement agencies and to provide future support to build capacity within law enforcement agencies. Of particular importance is cooperation among Member States in order to prevent precursor chemicals used in the illicit manufacture of drugs from being diverted from licit channels.

Notes

¹ Data on seizures in the United Kingdom of Great Britain and Northern Ireland in 2004 were not available to UNODC when the present report was being prepared. For the purposes of the statistical analysis contained in this report, it was assumed that seizures in the United Kingdom remained stable in 2004, given that in recent years that country has accounted for a large proportion of significant drug seizures.

² United Nations Office on Drugs and Crime, *Morocco: Cannabis Survey 2004* (May 2005).

³ United Nations Office on Drugs and Crime, *Summary Findings of Opium Trends in Afghanistan, 2005* (September 2005).

⁴ United Nations Office on Drugs and Crime, *Myanmar: Opium Survey 2005* (November 2005).

⁵ United Nations Office on Drugs and Crime, *Laos: Opium Survey 2005* (June 2005).

⁶ United Nations Office on Drugs and Crime, *Coca Cultivation in the Andean Region: a Survey of Bolivia, Colombia and Peru* (June 2005).

⁷ United Nations publication, Sales No. E.05.XI.10.

⁸ For the purposes of this calculation, it is assumed that 10 kg of opium are equivalent to 1 kg of morphine or 1 kg of heroin.

⁹ Amphetamine-type stimulants, as defined by UNODC, consist of amphetamines (amphetamine, methamphetamine), Ecstasy (MDMA and related substances) and other synthetic stimulants (methcathinone, phentermine, fenetylline etc.).

¹⁰ Information on seizures in the United Kingdom in 2004 was not available when the present report was being prepared. For purposes of analysis, it was assumed that seizure levels in the United Kingdom in 2004 were similar to those in 2003. In the last few years, the United Kingdom has accounted for the world's largest volume amphetamine seizures.

¹¹ *Transnational Organized Crime in the West African Region* (United Nations publication, Sales No. E.05.XI.1).