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**Tenth Meeting of the Heads of National Drug  
Law Enforcement Agencies, Europe**

Vienna, 2-5 July 2013

Item 3 of the provisional agenda\*\*

**Current situation with respect to regional and subregional  
cooperation****Statistics on drug trafficking trends in Europe and  
worldwide***Summary*

The present report provides an overview of the latest trends in illicit drug production and trafficking in Europe and worldwide. The statistics and analysis in the report are based on the latest information available to the United Nations Office on Drugs and Crime. In respect of seizure statistics, the report focuses on the ten years up to and including 2011. The report also includes the latest available information on cultivation, production and manufacture of illicit drugs.

Cannabis continues to be the most widely cultivated, produced, trafficked and consumed illicit drug. While global cannabis herb seizures decreased in 2011, seizures in Europe increased from 164 tons in 2010 to 184 tons in 2011. Seizures of cannabis resin decreased for the third consecutive year both globally and within Europe. Europe accounted for 49 per cent of global cannabis resin seizures in 2011 (down from 77 per cent in 2001).

Afghanistan and Myanmar continued to account for the majority of illicit opium poppy cultivation worldwide; 84 per cent of global opium cultivation occurred in those two countries. In 2012, opium poppy cultivation in Afghanistan covered 154,000 ha, 18 per cent more than the previous year. However, since plant diseases and bad weather had damaged crops, potential opium production fell 36 per cent over the same period. In Myanmar, cultivation increased by 17 per cent to 51,000 ha and estimated opium production increased by 12 per cent to 690 tons. In 2011, seizures of opium remained at similar levels to the previous year, while seizures of heroin decreased in Europe and worldwide.

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\* English, French, Russian and Spanish are the working languages of the subsidiary body.

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The cultivation of coca bush remained concentrated in the Plurinational State of Bolivia, Colombia and Peru. The total area under coca bush cultivation was stable in 2011. Global seizures of cocaine dropped slightly in 2011, and a small increase in cocaine seizures was recorded by countries in Europe.

The clearest trend to emerge from the 2011 data is the increase in global seizures of methamphetamine. In recent years, the global market for methamphetamine has expanded significantly. After relatively stable levels of seizures leading up to 2008, the annual amount of methamphetamine seized globally increased rapidly to nearly 88 tons in 2011. The level of global seizures of methamphetamine in 2011 is more than three times the level recorded in 2008. In 2011, European countries accounted for a small, but increasing, share of global methamphetamine seizures.

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## **I. Introduction**

1. The present report provides an overview of developments in the production and trafficking of the main illicit drugs at the global and regional levels with a particular focus on trends within Europe. Analysis is based on the latest information available to the United Nations Office on Drugs and Crime (UNODC).
2. Information on illicit cannabis, opium poppy and coca bush cultivation and illicit opium and coca production for the years leading up to and, in some cases, including 2012 is contained in the report. With regard to drug trafficking, the report focuses on seizure statistics during the ten years up to 2011, and provides an update on trafficking trends in cannabis, opiates, cocaine and amphetamine-type stimulants.
3. Information on illicit drug crop cultivation and production of plant-based drugs was drawn from the latest illicit crop-monitoring surveys published by UNODC. The primary source of information on drug trafficking were replies to the annual reports questionnaire (ARQ), part IV (illicit supply of drugs), submitted by Governments for 2011 and previous years.
4. Annual data on seizures are available for nearly all European countries and the availability of drug seizure data for countries within Europe is very high. This simplifies analysis and removes the potential for variability from year to year due to missing data.
5. Part III of this report covers trends in global seizures for cannabis, opiates, cocaine and amphetamine-type stimulants. It has a specific focus on seizures within Europe and on trafficking routes leading to Europe.
6. In general, statistics on drug seizures offer valid, indirect indicators of trafficking trends. At the same time, they should be treated with caution, as they may reflect different reporting practices, as well as vary depending on the level, capacity and effectiveness of law enforcement authorities.

## **II. Global trends in illicit drug crop cultivation and the production of plant-based drugs**

### **A. Cannabis**

7. Unlike other illicit crops such as coca leaf and opium poppy, cannabis grows in varied environments and lends itself to diverse cultivation methods, which, in turn, makes the assessment of the extent of its cultivation and production difficult. Reports of cultivation, together with indirect indicators, such as seizures of cannabis plant, suggest that illicit cultivation of cannabis plant and production of cannabis herb occurred in most countries worldwide.
8. In contrast, production of cannabis resin tended to be concentrated in fewer countries, of which Morocco and Afghanistan were the most prominent. UNODC conducted a cannabis survey in Morocco during 2005 that estimated the total area under illicit cannabis cultivation to be 72,500 hectares (ha). Since then, Morocco estimated the net area under illicit cannabis cultivation (after eradication) to be 60,000 ha in 2008 and 47,500 ha in 2011, thus registering a decline.

9. In 2011, UNODC and the Government of Afghanistan carried out jointly the third dedicated Afghanistan cannabis survey. The survey found that cultivation of cannabis plant and production of cannabis resin in Afghanistan appeared stable, and that there was no evidence of a substantive change in comparison with the previous UNODC cannabis surveys of 2009 and 2010. Nevertheless, the number of cannabis plant-growing households in Afghanistan increased by 38 per cent, from 47,000 in 2010 to 65,000 in 2011. Virtually all of those cultivating cannabis plant were sporadic growers who had chosen to cultivate cannabis again, while only a small amount were first-time growers of cannabis plant. Moreover, commercial cannabis resin cultivation had spread to more provinces and cannabis was being cultivated in almost two thirds of the country's provinces (21 provinces) in 2011 as opposed to only half of them (17 of 34 provinces) in 2009.

## B. Opium

10. In 2011, Afghanistan and Myanmar continued to account for the majority of illicit opium poppy cultivation worldwide (see figure I), with 84 per cent of the global opium cultivation having occurred in those two countries. The global area under opium poppy cultivation increased from 191,000 ha in 2010 to 207,000 ha in 2011.<sup>1</sup>

11. Afghanistan remains the main country cultivating opium poppy. Opium poppy cultivation in Afghanistan covered 154,000 ha in 2012, 18 per cent more than the 131,000 ha recorded the previous year.<sup>2</sup> However, since plant diseases and bad weather had damaged crops, potential opium production fell 36 per cent over the same period, from 5,800 tons to 3,700 tons. Cultivation increased despite a significant 154 per cent increase in the area eradicated through Government efforts, which resulted in the eradication of more than 9,600 ha of opium poppy in 2012 (compared with 3,800 ha in 2011). The number of poppy-free provinces remained unchanged at 17. The Ghor province in the western part of Afghanistan lost its poppy-free status in 2012, while Faryab province in the Northern part of the country had regained it.

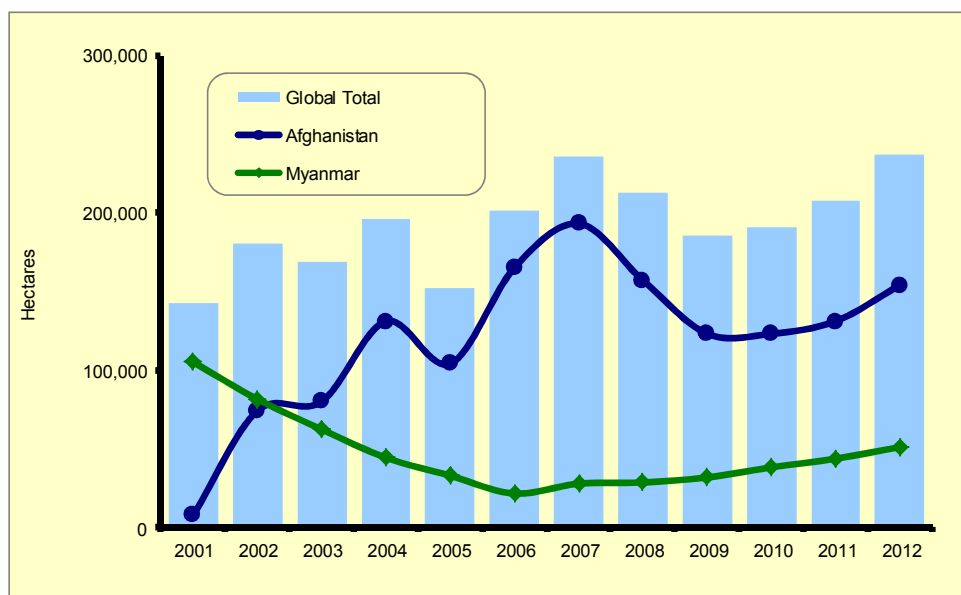
12. In 2012, 95 per cent of Afghanistan opium poppy cultivation was concentrated in the southern and western provinces. The provinces of Helmand, Kandahar, Uruzgan, Day Kundi and Zabul were the main contributors: 72 per cent of cultivation occurred in those provinces, and Helmand province continued to account for approximately one half of opium poppy cultivation in Afghanistan. The provinces of Farah, Herat and Nimroz accounted for 23 per cent of opium poppy cultivation.

13. The farm-gate prices for opium in Afghanistan remained at a relatively high level of \$196 per kilogram (kg), a price that continues to provide a strong incentive for farmers to start or resume opium poppy cultivation in the coming season. Due to low yields, the average gross income for opium poppy per hectare decreased by 57 per cent to \$4,600 in 2012, from \$10,700 in 2011.

<sup>1</sup> United Nations Office on Drugs and Crime, *World Drug Report 2012*.

<sup>2</sup> United Nations Office on Drugs and Crime, *Afghanistan Opium Survey 2012*.

Figure I  
**Illicit opium poppy cultivation worldwide, 2001-2012**  
 (Hectares)

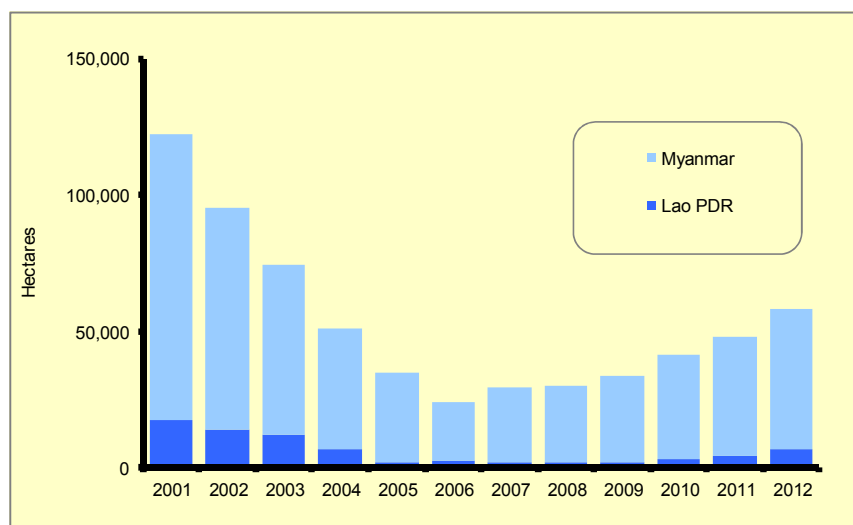


14. In South-East Asia, opium poppy cultivation has taken place in the Lao People's Democratic Republic, Myanmar, Thailand and Viet Nam. Cultivation in those countries tends to be on steep hills with poor soil and no irrigation facilities, resulting in lower yields than in Afghanistan. In Myanmar, opium poppy cultivation declined markedly over the decade preceding 2006, but then after that year, it followed a generally increasing trend, reaching 51,000 ha in 2012 (see figure II). While still relatively small in comparison with the peak level of 1996, the area under opium poppy cultivation in Myanmar in 2012 (51,000 ha) was significantly higher than in 2006 (21,500 ha). The estimated opium production in Myanmar rose from 610 tons in 2011 to 690 tons in 2012, making Myanmar the region's largest cultivator of opium poppy and largest producer of illicit opium.

15. In the Lao People's Democratic Republic, the area under opium poppy cultivation increased from 4,100 ha in 2011 to an estimated 6,800 ha in 2012. That level, although low in comparison with the level registered in the period 1996-1999, represented the fifth year-on-year increase and amounted to over four times the level observed in 2007 (1,500 ha). Opium poppy cultivation took place in four of the six provinces in northern Lao People's Democratic Republic,<sup>3</sup> namely Phongsali, Louang Namtha, Houaphan and Louangphrabang. The estimated production of opium in the country increased from 25 tons in 2011 to 41 tons in 2012.

<sup>3</sup> United Nations Office on Drugs and Crime, *South-East Asia Opium Survey 2012, Lao PDR, Myanmar*.

Figure II  
**Opium poppy cultivation in South-East Asia, 2001-2012**  
 (Hectares)



16. Opium poppy cultivation also took place in Mexico. Although recent estimates from the Government of Mexico on the net area under cultivation were not available in 2011, Mexico reported the eradication of 16,389 ha under cultivation. The Mexican authorities reported that opium resin was trafficked mostly by land and was produced from opium poppy cultivated mainly on the Pacific coast.<sup>4</sup>

### C. Coca

17. The cultivation of coca bush remained concentrated in the Plurinational State of Bolivia, Colombia and Peru. The total area under cultivation was stable in 2011, with a balance of slight increases in Colombia and Peru and a decrease in Plurinational State of Bolivia. The illicit extraction of cocaine alkaloids from coca leaves, a first step in the manufacture of cocaine, took place nearly exclusively in those three countries, which also accounted for most of the cocaine hydrochloride manufactured worldwide. At the same time, in 2011, there were also indications of limited processing of cocaine in neighbouring countries, with laboratories seized in Ecuador, Mexico and Venezuela (Bolivarian Republic of). Facilities detected in Europe in recent years were predominantly secondary extraction laboratories, which recovered cocaine impregnated, dissolved or incorporated into other substances or materials.

18. In the Plurinational State of Bolivia, coca bush cultivation decreased, amounting to 27,200 ha in 2011, compared to 31,000 ha in 2010. The Yungas province of la Paz continued to account for approximately two thirds of that area of cultivation, with most of the remainder being in the Chapare region and a much

<sup>4</sup> Information contained in the country report submitted by Mexico to the Twenty-second Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean, held from 1 to 5 October 2012 in Antigua, Guatemala.

smaller area in the municipality of Apolo. Data from law enforcement agencies point to intensified efforts to contain cultivation of coca bush and the manufacture of cocaine: eradication of coca bush cultivation rose from 8,200 ha in 2010 to 10,800 ha in 2011 (including voluntary and forced eradication).

19. In Colombia, coca cultivation was 64,000 ha in 2011, up from 62,000 ha in 2010. The slight increase in 2011 follows three year-on-year decreases and is less than half the 145,000 ha recorded in 2001. Authorities in Colombia noted that measures taken to reduce the area under coca bush cultivation included the manual eradication of 34,170 ha and the eradication of a further 103,302 ha by aerial spraying.

20. While coca bush cultivation was identified in 23 of the 32 departments of Colombia in 2011, three provinces (Nariño, Guaviare and Putumayo) accounted for 54 per cent of the total. In Nariño, Guaviare, Putumayo and three other departments, the area under cultivation increased, which contributed to the overall increase in coca bush cultivation in the country. However, 14 departments recorded decreases in 2011, and 3 reported stable levels of cultivation. The largest reductions in the area under coca cultivation between 2010 and 2011 took place in the departments of Córdoba (a reduction of 2,801 ha) and Antioquia (a reduction of 2,246 ha) in the central region. In 2011, all departments were below their highest peaks of coca bush cultivation, and the departments of Bolivar and Vichada reached the lowest levels of cultivation since at least 1999. The noteworthy reduction of coca bush cultivation in the department of Meta continues, falling from 18,740 ha in 2004 to 3,039 ha in 2011.

21. In Peru, the net area under coca bush cultivation increased slightly, reaching 64,400 ha in 2011, compared with 61,200 ha in 2010. The total area under cultivation has gradually increased by 34 per cent from 2005 to 2011, but remains below the high levels registered prior to 1996. In 2011, the area of coca bush cultivation in Peru (64,400 ha) was comparable to the cultivation area in Colombia (64,000 ha). However, in 2011, the trend in Peru of an increasing total area under cultivation was contained by eradication efforts: a total of 10,290 ha under coca bush cultivation were eradicated (including voluntary and forced eradication).

### III. Trends in illicit drug trafficking

22. Table 1 shows the reported quantities of seized drugs for the major drug groups in 2010 and 2011. For each drug type, the table shows the total amount seized both globally and by European countries during 2011 and 2010. The table also shows the percentage of the global total attributable to Europe.

23. In terms of seizures by weight, cannabis resin is the most seized drug in Europe (517 tons), followed by cannabis herb (184 tons), cocaine (62 tons), and heroin (15 tons). When looking at the percentage of global seizure that occur in Europe, cannabis resin was also the highest (48.8 per cent), followed by "ecstasy"-type substances (47.2 per cent), amphetamine (26.6 per cent), heroin (19.7 per cent) and cocaine (10.6 per cent).



Table 1  
Global and European drug seizures, 2010 and 2011

Drug type	2010			2011		
	Europe (kilograms)	Global (kilograms)	Percentage	Europe (kilograms)	Global (kilograms)	Percentage
<b>Cannabis</b>						
Cannabis herb	164,243	6,664,259	2.5	184,065	5,761,619	3.2
Cannabis resin	566,447	1,136,804	49.8	517,348	1,059,317	48.8
<b>Coca</b>						
Cocaine	61,672	608,692	10.1	62,763	594,401	10.6
<b>Opiates</b>						
Opium	1,637	492,439	0.3	1,772	491,370	0.4
Illicit morphine	41	19,304	0.2	37	62,353	0.1
Heroin	21,826	80,981	27.0	14,714	74,867	19.7
<b>ATS</b>						
Amphetamine	5,479	19,464	28.2	8,177	30,770	26.6
Methamphetamine	576	50,880	1.1	1,582	87,996	1.8
“Ecstasy”	1,312	3,788	34.6	1,669	3,539	47.2

## A. Cannabis

### Cannabis herb — Global trends

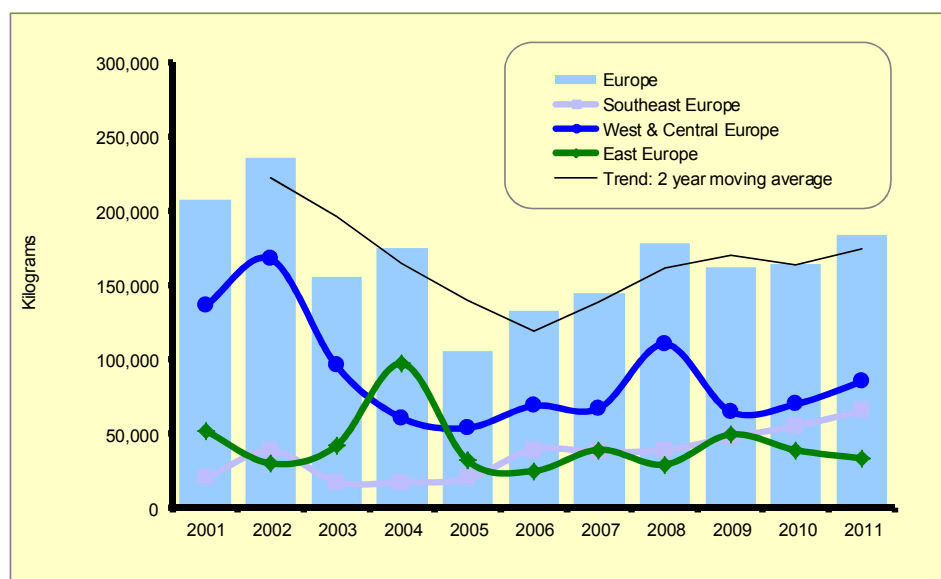
24. Given the relative ease with which cannabis herb can be produced, demand is often met through local production, resulting in a pattern of trafficking flows, which tend to be rather localized in comparison with other plant-based illicit drugs. In 2011, cannabis herb continued to be consumed, trafficked and produced in most countries worldwide. Between 2006 and 2011, the level of global seizures ranged from 5,525 to 6,664 tons per year. Seizures in 2011 decreased to 5,762 tons from 6,664 tons in 2010.

25. In 2011, the largest proportion of global cannabis herb seizures — 69 per cent — continued to take place in North America. In addition, 14 per cent of seizures were made in South America and the Caribbean, 9 per cent in Africa, 5 per cent in Asia, 3 per cent in Europe and less than 1 per cent in Oceania.

### Cannabis herb — Europe

26. Despite some fluctuations in annual seizures of cannabis herb, the underlying trend in Europe during recent years is one of gradual increase, with seizures reaching 184 tons in 2011 (see figure III). However, seizures have remained lower than levels recorded between 2001 and 2002 when European countries seized over 200 tons of cannabis per year. On average, authorities seized 156 tons of cannabis each year between 2003 and 2011 and during this period seizures in Europe have accounted for between 2.1 per cent and 3.2 per cent of global seizures.

Figure III  
**Cannabis herb seizures in Europe, 2000-2011**  
 (Kilograms)



27. The underlying trend in cannabis herb seizures in Western and Central Europe and Eastern Europe has remained relatively stable since 2005. However, the trend in Southeast Europe has been increasing since 2003. Seizures increased from nearly 18 tons in 2003 to over 65 tons in 2011. The increase is primarily due to seizures in Turkey where seizures have risen each year since 2002. The seizure of 55 tons of cannabis herb in the country during 2011 is ten times greater than the five tons seized in 2002.

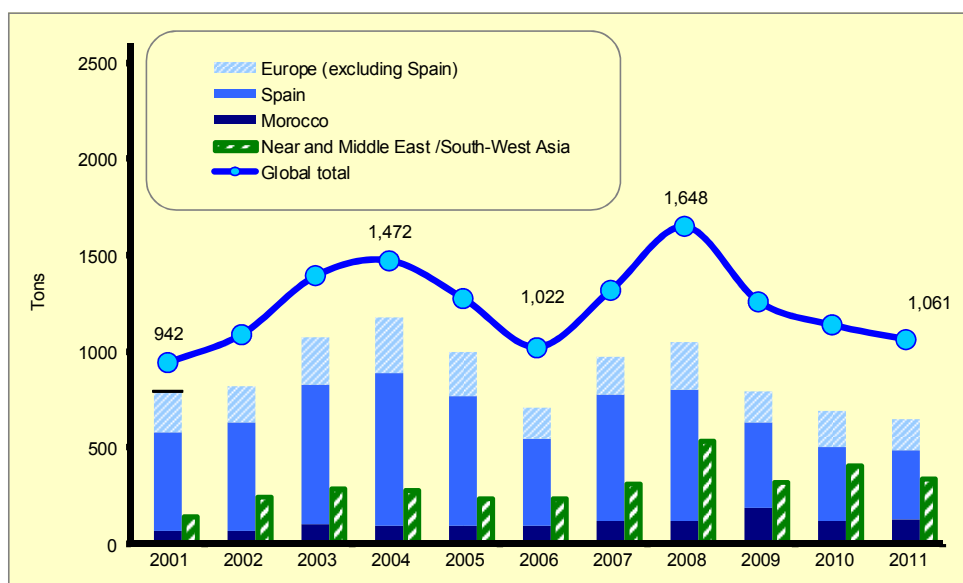
28. Authorities in Turkey<sup>5</sup> reported that cannabis herb continues to be the most widely used and seized drug. In line with the upward trend in the volume of seizures, the number of operations increased by 77 per cent and the number of arrests increased by 75 per cent between 2007-2011. Like many other countries, a large proportion of the cannabis seized by authorities in Turkey is produced locally. However, the authorities of Turkey reported in November 2012 that cannabis was also supplied from the Islamic Republic of Iran and Syria.

#### **Cannabis resin — Global trends**

29. In contrast with cannabis herb, the production of cannabis resin was concentrated in a small number of countries, among which the most prominent were Afghanistan and Morocco. Consequently, trafficking of cannabis resin followed flows that are more distinct. One of these flows is into Europe (mainly via Spain) from Morocco; the second is primarily from Afghanistan into and through neighbouring countries. Figure IV shows seizures related to these two distinct flows.

<sup>5</sup> Country Report of Turkey, Forty-seventh session of the Subcommittee on Illicit Drug Trafficking and Related Matters in the Near and Middle East, held from 19 to 23 November 2012 in Antalya, Turkey.

Figure IV  
**Cannabis resin seizures, 2001-2011**  
 (Tons)



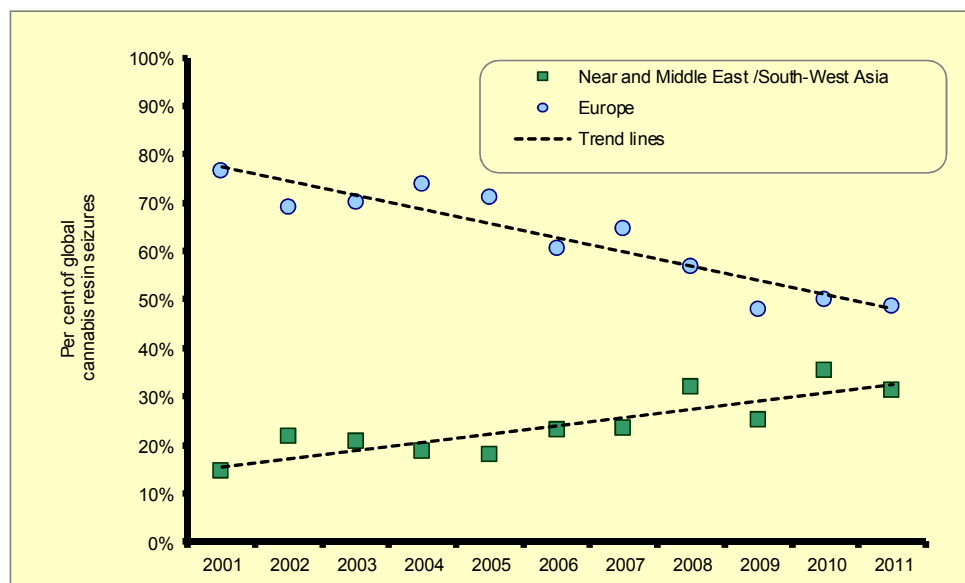
30. In 2011, 28 countries seized more than one ton of cannabis resin. Nearly half of these countries (13 out of 28) were in Europe. Seven countries in the Near and Middle East and South-West Asia and four countries in Africa, mainly in North Africa, seized over one ton of cannabis resin.

#### Cannabis resin — Europe

31. Data from the 2011 annual reports questionnaires indicates that the majority of cannabis resin seized in Europe is likely to have been produced in Morocco. However, several European countries also listed Afghanistan and Pakistan as source countries for the drug. Figure V shows that, since 2001, the proportion of global cannabis resin seizures occurring in Europe has been decreasing, while the proportion of cannabis resin seized in the Near and Middle East and Southwest Asia has increasing.

32. In 2011, 49 per cent of global cannabis resin seizures occurred in Europe down from 77 per cent in 2001. The largest annual seizures of cannabis resin within Europe occurred in Spain (355,904 kg). Spain seized more than six times the amount of cannabis resin than any other country in Europe. Spain's proximity to Morocco, a known source country for cannabis resin, means that Spain has an important role in preventing cannabis resin from reaching other European countries.

Figure V  
**Cannabis resin seizures, Near and Middle East/South-West Asia and Europe**  
**2001-2011**  
 (Per cent of global seizures)



33. Spanish authorities reported<sup>6</sup> that in the past decade, the quantities of hashish seized have shown a decreasing trend and that the average prices have been increasing. One gram of hashish cost €5.28 in 2011, one per cent higher than 2010 and 37 per cent higher than in 2002.

## B. Opiates

34. The estimated annual prevalence of opiate use worldwide is between 0.3 and 0.5 per cent of the adult population<sup>7</sup> (between 13 million and 21 million past-year users); the majority of these people are heroin users. As a result, heroin trafficking is of great concern. Seizures of opium and morphine continue to primarily occur within the Near and Middle East and South-West Asia, whereas seizures of heroin follow a much wider geographical distribution.

### 1. Opium

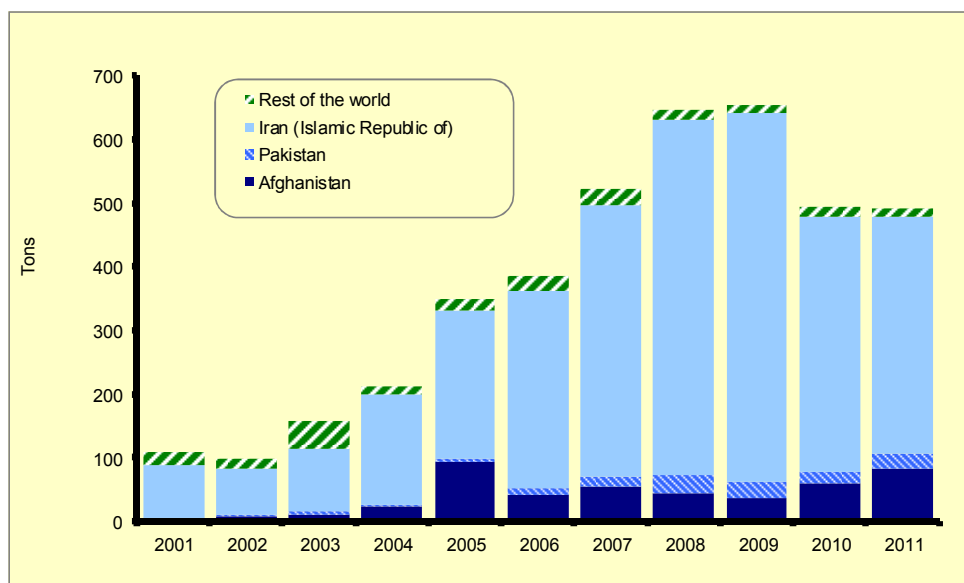
35. Global seizures of opium grew at a marked pace over the period 2002-2008 and stabilized in 2009 at 653 tons. Global opium seizures declined to 492 tons in 2010 and remained at a similar level in 2011 (491 tons). Since 2004, Afghanistan, the Islamic Republic of Iran and Pakistan have accounted for more than 90 per cent of global opium seizures.

<sup>6</sup> Country report of Spain, Twenty-second Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean, Antigua, Guatemala, held from 1 to 5 October 2012 in Antigua, Guatemala.

<sup>7</sup> United Nations Office on Drugs and Crime, *World Drug Report 2012*.

36. Based on the records of UNODC, the Islamic Republic of Iran has registered the highest annual total of opium seized by a single country worldwide every year since 1980. Over the period 2002-2009 in particular, seizures increased almost eightfold, climbing from 73 tons to 580 tons. In 2010, the increasing trend started to reverse, and seizures in the country fell to 374 tons in 2011.<sup>8</sup> In 2011, opium seizures in Afghanistan increased for the second consecutive year to 80 tons, the highest level since 2005.

Figure VI  
Global opium seizures, 2001-2011  
(Tons)



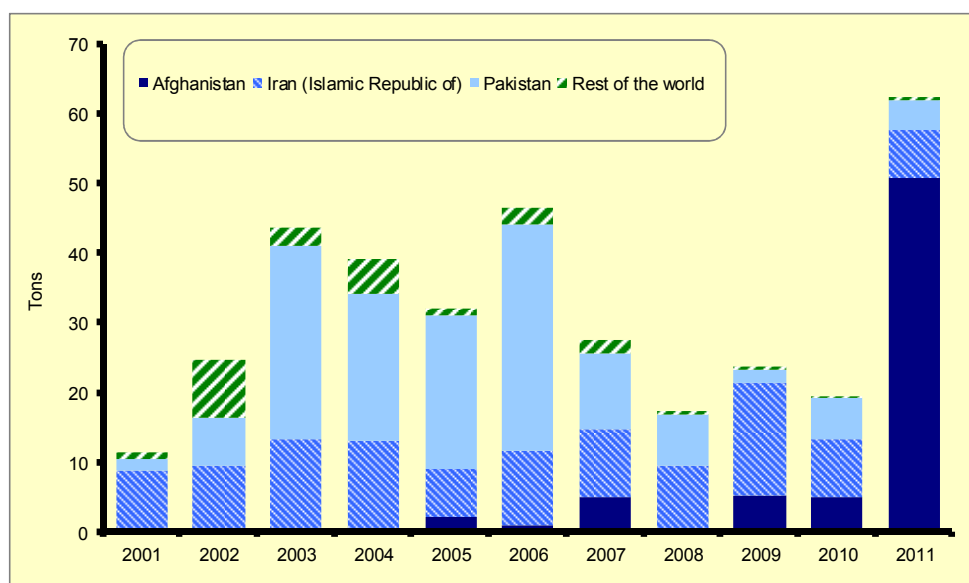
37. Less than half of one per cent of global opium seizures occur in Europe and, in any given year, many European countries report nothing, or very small amounts, of opium seized. Turkey and the Russian Federation are the two only countries in Europe who regularly seize over 100 kilograms of opium per year.

## 2. Morphine

38. As is the case with opium, seizures of morphine continued to be concentrated in Afghanistan and neighbouring countries. Since 2005, Afghanistan, Iran (Islamic Republic of) and Pakistan together accounted for more than 90 per cent of global morphine seizures. Morphine seizures in the Near and Middle East and South-West Asia generally decreased between 2006 and 2010, while morphine seizures within Afghanistan increased significantly in 2011. Future data will reveal if the significant increase in seizures for 2011 is a one-time occurrence, or if the increase signals the start of an increasing trend (see figure VII). Seizures amounted to 50.8 tons in Afghanistan, 6.8 tons in Iran (Islamic Republic of) and 4.3 tons in Pakistan.

<sup>8</sup> Information contained in the 2011 Annual Report of the Drug Control Headquarters, Islamic Republic of Iran.

Figure VII  
**Global morphine seizures, 2001-2011**  
 (Tons)

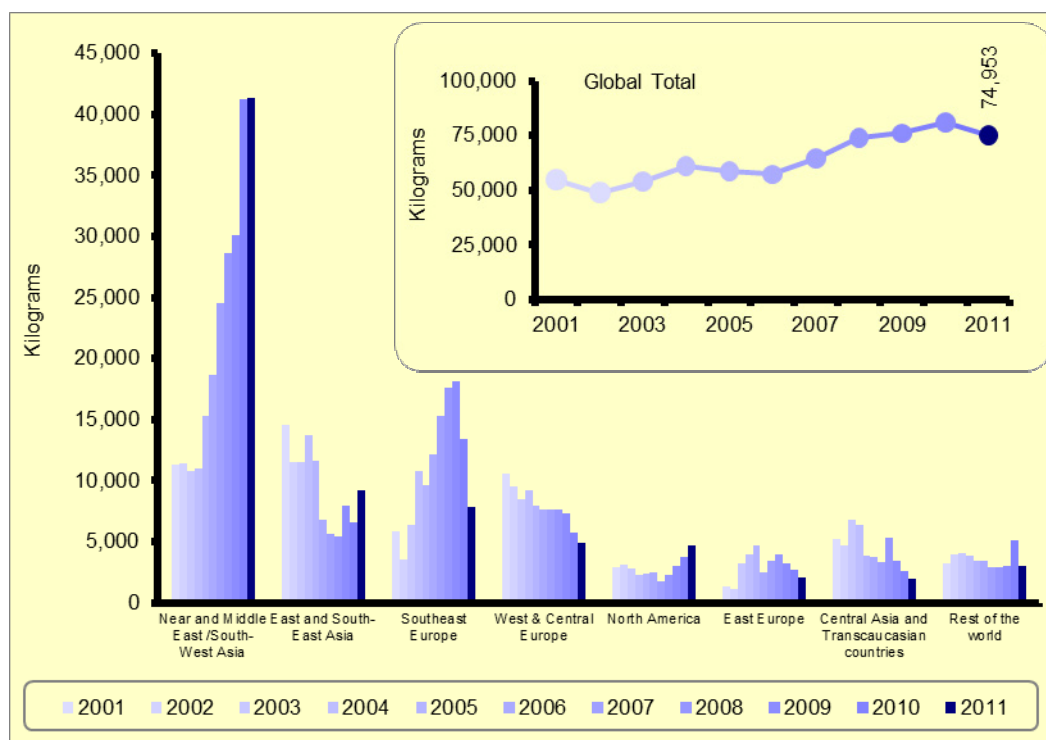


39. Seizure data indicates that very small amounts of illicit morphine are trafficked to Europe. As an example of relative scale, the amount of heroin seized in Europe during 2011 was nearly 400 times greater than the amount of illicit morphine seized in the region. Illicit morphine seizures in Europe accounted for 0.06 per cent of global seizures in 2011. Within Europe, only the Russian Federation and Turkey regularly seize over 1 kilogram of illicit morphine per year. Since 1981, Turkey has consistently recorded the highest annual illicit morphine seizure of any European country, and over the 30 years between 1981 and 2011 has reported seizing over 29 tons of illicit morphine.

### 3. Heroin

40. After having been increasing since 2002 (see figure VIII), global heroin seizures now dropped to just under 75 tons in 2011 (from 81 tons in 2010). The annual decrease is due to a significant fall in seizures in Europe, particularly in South-Eastern Europe where seizures decreased for the second consecutive year. Seizures in East and Southeast Asia and North America increased in 2011, while seizures in the Near and Middle East and South-West Asia stabilized after a sustained period of annual increases since 2004.

Figure VIII  
**Global heroin seizures, 2001-2011**  
 (Kilograms)



41. Between 2003 and 2010, seizures of heroin in the Islamic Republic of Iran increased eightfold, reaching 27 tons in 2010 — equivalent to seven year-on-year increases of 35 per cent. That trend ended in 2011, with seizures in the country falling 15 per cent, to 23 tons.<sup>9</sup> In Pakistan, seizures of heroin doubled between 2009 and 2010, reaching 4.2 tons. Heroin seizures continued to increase in 2011, with seizures reaching 7.6 tons, the highest level in that country since 2000.

42. Heroin seizures in Europe decreased in 2011 for the third consecutive year. Several countries contributed to the annual decrease, notably Hungary (decrease of 97 per cent), Slovenia (decrease of 88 per cent), the Czech Republic (decrease of 84 per cent), Sweden (decrease of 64 per cent), Belgium (decrease of 64 per cent), Latvia (decrease of 61 per cent), Greece (decrease of 34 per cent) and Austria (decrease of 32 per cent). The most notable exceptions were Poland (increase of 90 per cent) and Spain (increase of 77 per cent). Spain seized 413 kg of heroin in 2011 and authorities of that country noted that heroin seizures in the past decade had shown a generally increasing trend.<sup>10</sup>

<sup>9</sup> Information contained in the 2011 Annual Report of the Drug Control Headquarters, Islamic Republic of Iran.

<sup>10</sup> Information contained in the country report submitted by Spain to the Twenty-second Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean, held from 1 to 5 October 2012 in Antigua, Guatemala.

43. The Russian Federation continued to be another major consumer market deriving its heroin supply from opium production and heroin manufacture in Afghanistan. However, seizures of heroin in the country fell for the third consecutive year from 2.6 tons in 2010 to 2.0 tons in 2011, the lowest level since 2002. Heroin continued to be trafficked northward from Afghanistan to the Russian Federation via Central Asia. Russian authorities identified Azerbaijan, Kazakhstan, Kyrgyzstan, Tajikistan and Uzbekistan as major transit countries for heroin reaching the territory of the Russian Federation in 2011.

44. While heroin seizures have been decreasing in Europe in recent years, seizures have been increasing in North America. The United States, Mexico and Canada reported an increase in heroin seizures during 2011. In 2011, authorities in North America seized 4.7 tons of heroin (just below the 5.9 tons seized in Western and Central Europe). United States authorities noted that the availability of heroin continued to increase in 2011 due to traffickers expanding into new markets. Heroin seizures along the south-west border of the United States have increased steadily since 2007.

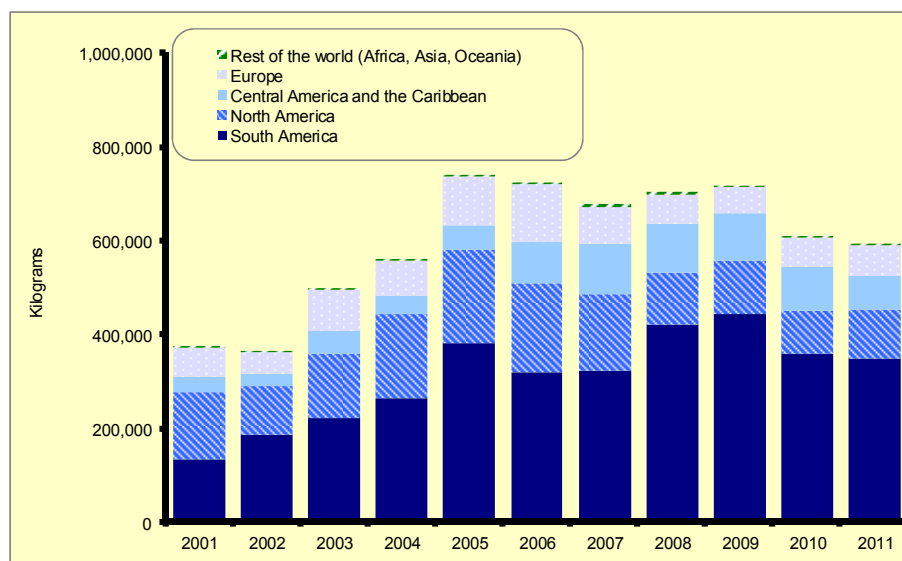
## C. Cocaine

### Cocaine — Global trends

45. After a relatively stable period from 2005 to 2009, global cocaine seizures declined in both 2010 and 2011. While seizures have decreased, the geographic distribution has remained stable with the major producing and transit regions of South America, Central America and the Caribbean accounting for 70.6 per cent of global seizures in 2011 (compared to 74 per cent in 2009). Seizures in the traditional consumer markets of North America and Europe accounted for 28.7 per cent of global cocaine seizures. Only 0.8 per cent of seizures occurred in the rest of the world (Asia, Africa and Oceania). Figure IX shows the trend in selected regions and subregions between 2001 and 2011.

Figure IX

**Global cocaine seizures, 2001-2011**  
(Kilograms)





46. Among South American countries, Colombia continued to seize the largest quantities of cocaine, but seizures in that country fell from 165 tons in 2010 to 146 tons in 2011. Colombian authorities reported that, in terms of quantity of cocaine seized, maritime seizure operations were the most successful.<sup>11</sup> An operation conducted jointly with Honduras resulted in the seizure of 8,963 kg of cocaine, and an operation carried out in July 2011, under an agreement on maritime interdiction between Colombia and the United States, resulted in the seizure of 6,900 kg of cocaine. Authorities in Honduras reported seizing 16,800 kg of cocaine in 2011, the largest annual amount seized by that country.

47. In Peru, cocaine seizures fell by 7 tons to just under 11 tons in 2011, the lowest level since 2003. In contrast, seizures in the Plurinational State of Bolivia rose for the second consecutive year, to a new record level of 34 tons. Over the past four years, there has been a noticeable increase in cocaine seizures in the Plurinational State of Bolivia. Between 2007 and 2011, Bolivia seized an average of 30 tons of cocaine per year, a significantly larger amount than the average of 11 tons seized between 2001 and 2006.

48. According to the Ecuadorean authorities,<sup>12</sup> international trafficking networks are increasingly using Ecuador for stockpiling, storage and distribution of illicit drugs, trafficking in precursor chemicals and other drug-related offences. Seizures of cocaine in that country increased slightly to 21 tons in 2011, up from 15 tons in 2010. However, seizures are still significantly below the 65 tons seized in 2009. In 2011, the amount of cocaine seized in Brazil (24 tons), Chile (9 tons) and Argentina (4 tons) decreased from the previous year, while the amount of cocaine seized in the Bolivarian Republic of Venezuela increased slightly, to 26 tons.

49. Cocaine continues to be trafficked to United States and Canada through Central America from South America, however, the amount of cocaine seized in the United States has dropped in recent years. Annual cocaine seizures in the United States peaked at over 165 tons in 2006, but dropped below 100 tons in 2008 and remained below 100 tons in 2009, 2010 and 2011.

### **Cocaine — Europe**

50. Seizures of cocaine within Europe increased slightly in 2011, in contrast to the decrease in global seizures. The main contributors to the increase in Europe appear to be France and Italy. Both countries recorded their largest annual seizures since UNODC records started in 1980. French law enforcement and naval activities, particularly in the Caribbean Sea, appear to be contributing to the increase. Authorities in Italy noted<sup>13</sup> that joint operations, information exchanges and investigative cooperation took place with eleven countries in Latin American and

<sup>11</sup> Information contained in the country report submitted by Colombia to the Twenty-second Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean, held from 1 to 5 October 2012 in Antigua, Guatemala.

<sup>12</sup> Information contained in the country report submitted by Ecuador to the Twenty-first Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean, Santiago, held from 3 to 7 October 2011 in Santiago de Chile.

<sup>13</sup> Country report of Italy, Twenty-second Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean, Antigua, Guatemala, held from 1 to 5 October 2012 in Antigua, Guatemala.

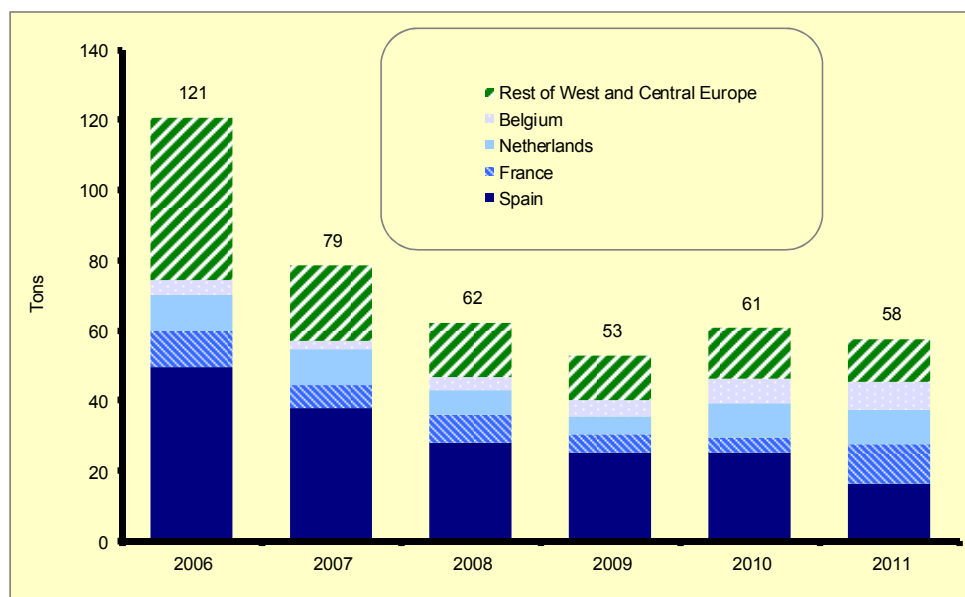
the Caribbean. Law enforcement cooperation and coordination may have contributed to the increase in cocaine seizures recorded by Italy in 2011.

51. Each year since 2001, Spain has been the European country with the largest annual seizures of cocaine. This trend continued in 2011, with Spain seizing over 16 tons of cocaine and accounting for 26 per cent of cocaine seizures in Europe. However, cocaine seizures in Spain have been decreasing since 2005, and the 16 tons seized in 2011 is the lowest annual seizure figure for over a decade. The noticeable decrease in Spanish cocaine seizures and stable seizures in Europe may indicate organized criminal groups are using alternative routes to traffic cocaine into the European market.

Figure X

**Cocaine seizures in Europe, 2006-2011**

(Tons)



52. A secondary route for cocaine trafficked across the Atlantic to Europe involves the use of countries in Africa, notably West Africa, as transit countries. There are difficulties in assessing the long-term trend due to limited consistent and reliable data and variable levels of law enforcement capacity in the region. However, there are clear indications that the route continues to be used to traffic cocaine to Europe. During each of the years between 2007 and 2011, at least one country in Africa has reported annual seizures of over 400 kilograms of cocaine and in 2011 three West African countries (Nigeria, Togo and Benin) reported seizing over 400 kilograms.

## D. Amphetamine-type stimulants

### Amphetamine — Global trends

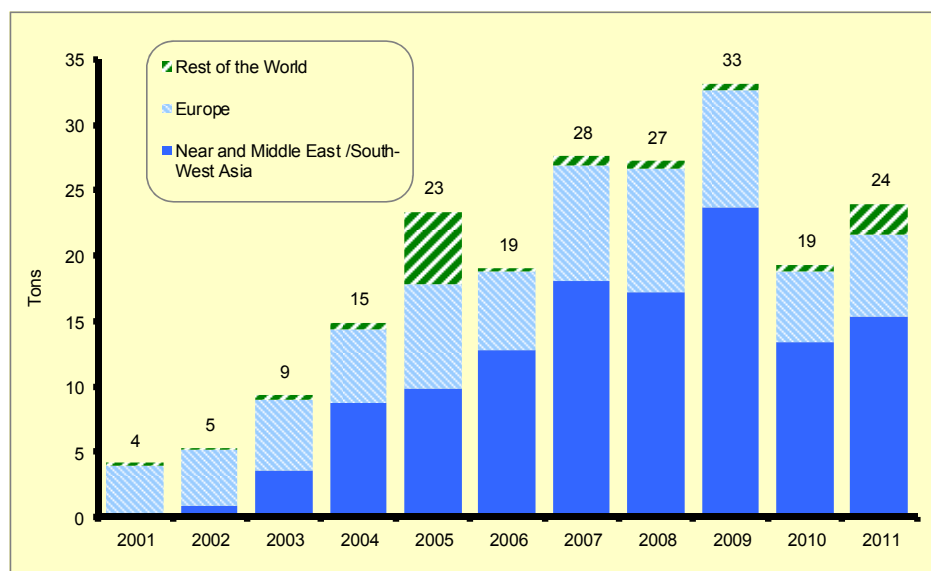
53. Global amphetamine seizures followed a generally increasing trend over the period 2001-2009, driven in part by increases in Captagon seizures registered in the

Near and Middle East/South-West Asia, which as a whole overtook Europe, the other major market for amphetamine, in terms of total seizure quantities (see figure XI). Seizures decreased to 19 tons in 2010 but rebounded to 24 tons in 2011 and remain below the peak of 33 tons recorded in 2009. Seizures in Europe and the Near and Middle East/South-West Asia increased marginally in 2011, but remained below the levels recorded during the period 2007-2009.

Figure XI

**Amphetamine seizures, 2001-2011**

(Tons)



54. Saudi Arabia is a major consumer market for Captagon tablets and for the ninth consecutive year recorded the largest annual seizure of amphetamine by a single country. Seizures in Saudi Arabia rose from 8.8 tons in 2010 (52 million tablets) to 11.5 tons (67 million tablets). In the Syrian Arab Republic, seizures rose from 2.1 tons (12 million tablets) in 2010 to 3.9 tons (23 million tablets) in 2011, the highest level recorded in that country and slightly above the 3.7 tons (22 million tablets) recorded in 2009. For several years, the amphetamine present in Captagon tablets consumed in the Near and Middle East/South-West Asia was sourced in Europe, with countries such as Jordan, the Syrian Arab Republic and Turkey being used as important transit areas. It is unclear from the data if that supply has been supplemented by other sources in recent years.

**Amphetamine — Europe**

55. In Western and Central Europe, amphetamine seizures rose significantly over the period 2001-2007, and remained at increased levels in 2008 (7.9 tons) and 2009 (7.4 tons), but decreased significantly in 2010 (4.7 tons). In 2011, amphetamine seizures in Western and Central Europe remained stable at 4.7 tons. Although the amount of amphetamine seized in Western and Central Europe was stable, seizures in the whole of Europe increased to 7.1 tons during 2011. The

increase in Europe can be partially attributed to seizures by the Russian Federation where authorities seized 2,044 kg of amphetamine.

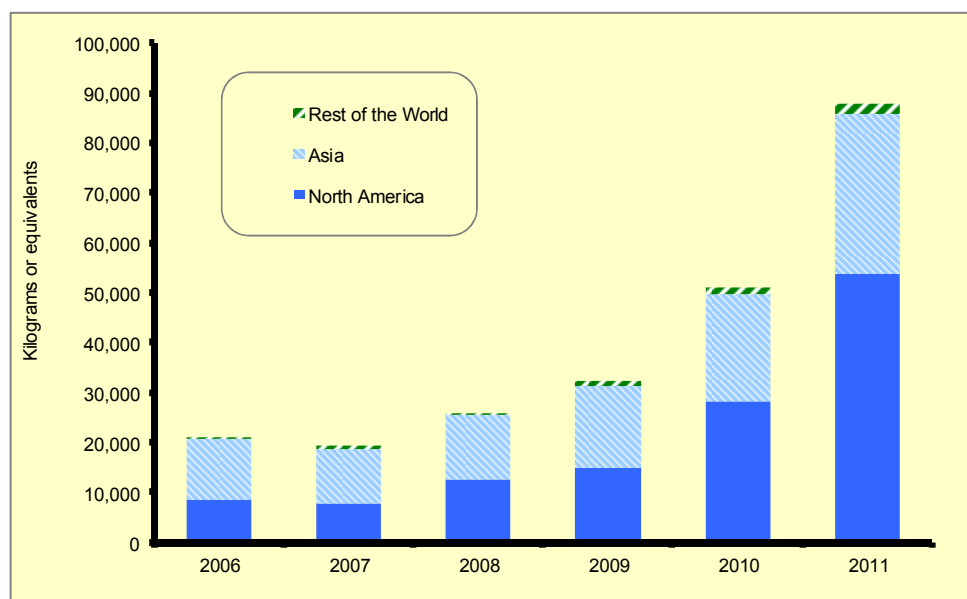
### **Methamphetamine — Global trends**

56. Between 2008 and 2011, the global market for methamphetamine expanded significantly (see figure XII). After relatively stable levels of seizures leading up to 2008, the annual amount of methamphetamine seized globally increased rapidly to nearly 88 tons in 2011. The level of global seizures of methamphetamine in 2011 is more than three times the level recorded in 2008.

Figure XII

#### **Methamphetamine seizures, 2006-2011**

(Kilograms or equivalents)



57. Large quantities of methamphetamine continue to be illicitly manufactured in Mexico, and seizures there have risen sharply. In 2011, over 30 tons (30,740 kg) of methamphetamine were seized in Mexico, up from 13 tons in 2010; prior to 2009, seizures had never exceeded one ton. The amount of methamphetamine seized in Mexico in 2011 is equivalent to the global total just two years prior. Mexican authorities identified two major methamphetamine-producing regions: in the north (the states of Sinaloa, Sonora and Baja California) and the central region (Michoacán, Jalisco and Guanajuato).

58. Seizures of methamphetamine continued to rise markedly in East and South-East Asia, from 16 tons in 2009 to 20 tons in 2010 and 25 tons in 2011. China and Thailand accounted for 94 per cent of methamphetamine seizures in East and South-East Asia during 2011.

59. China continued to be affected by the manufacture, trafficking and consumption of methamphetamine on a large scale. Throughout the period 2005-2009, annual methamphetamine seizures reported by China ranged between 6 tons and 7 tons and in 2011, seizures reached 14.3 tons. Authorities in

China indicated that methamphetamine was trafficked across the border from Myanmar into China. Illicit manufacture of amphetamine-type stimulants appeared to continue to take place in China, with authorities reporting the detection of 357 clandestine laboratories in 2011 (down from 378 laboratories in 2010).

60. Thailand seized 9.6 tons of methamphetamine in 2011, up from 5.6 tons in 2010. Authorities in Thailand reported that methamphetamine pills remained the most abused and trafficked drug in Thailand and that the abuse of and trafficking in crystallized methamphetamine continued to escalate.<sup>14</sup> Authorities also stated that traffickers have been aggressively introducing methamphetamine in the market by using different campaigns such as giving out free samples, reducing the price and selling in small quantities. Thai authorities identified Myanmar as the source country for methamphetamine and the Lao People's Democratic Republic and Cambodia as transit countries.

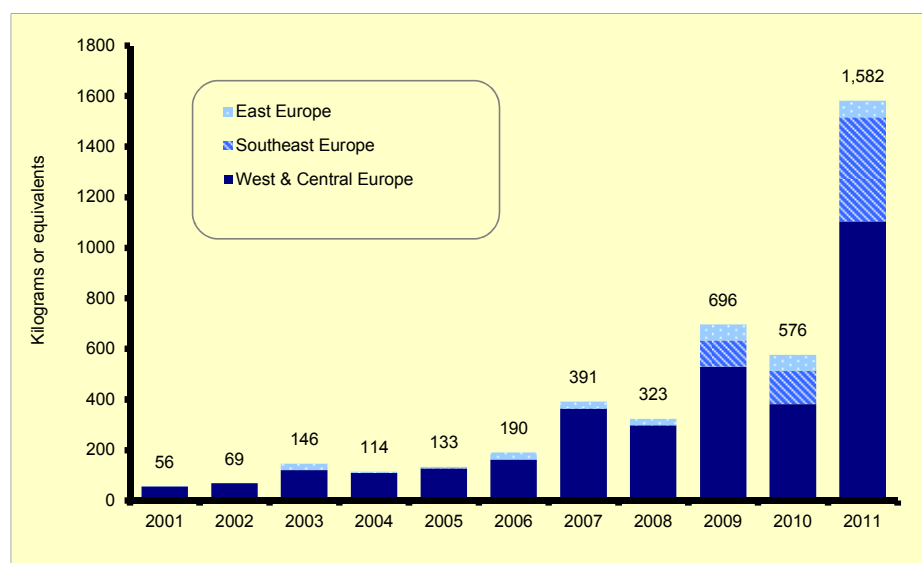
### Methamphetamine — Europe

61. While Europe's share of global methamphetamine seizures in 2011 was relatively small (1.8 per cent) it has doubled over four years from 0.9 per cent in 2007. Seizures reached just under 1.6 tons in 2011 with large annual seizures taking place in Poland (518 kg), Turkey (350 kg), Norway (156 kg), Lithuania (134 kg), Sweden (95 kg), Russian Federation (59 kg), Latvia (52 kg), France (49 kg), Germany (40 kg), Finland (28 kg), Romania (25 kg) and the Czech Republic (20 kg). Other countries in the region seized less than 10 kg during 2011.

Figure XIII

### Methamphetamine seizures — Europe, 2001-2011

(Kilograms or equivalents)



<sup>14</sup> Information contained in the country report submitted by Thailand to the Thirty-sixth Meeting of Heads of National Drug Law Enforcement Agencies, Asia and the Pacific, held from 30 October to 2 November 2012 in Bangkok, Thailand.

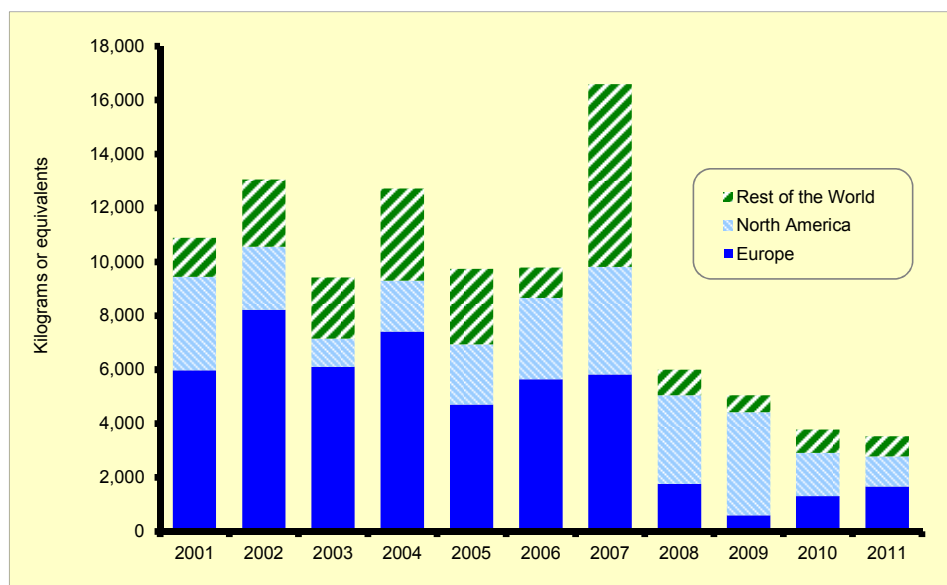
### “Ecstasy”-type substances

62. In recent years, the global market for “ecstasy” showed a marked decline, with global seizures falling from the record level of 17 tons in 2007 to 3.5 tons in 2011. Global seizures of “ecstasy”-type substances have decreased for four consecutive years. Figure XIV shows that North America and Europe continue to be the two regions where the majority of “ecstasy” seizures occur. Europe accounted for 47 per cent of global “ecstasy” seizures in 2011, up from 35 per cent in 2010.

Figure XIV

#### “Ecstasy”-type substances seizures, 2001-2011

(Kilograms or equivalents)



63. In 2011, seizures in the United States halved to 521 kg (from 1,069 kg in 2010), and Canadian seizures fell significantly to 192 kg (from 529 kg in 2010). Six other countries seized over 100 kilograms of “ecstasy”-type substances and four of these countries were in Europe (Netherlands, France, Turkey and the United Kingdom). Australia and Indonesia were the only countries outside of North America and Europe, where over 100 kilograms of “ecstasy”-type substances were seized.

## IV. Conclusions

64. Cannabis continues to be the most widely cultivated, produced, trafficked and consumed illicit drug. Global cannabis herb seizures decreased in 2011, while seizures in Europe increased from 164 tons in 2010 to 184 tons in 2011. Seizures of cannabis resin decreased for the third consecutive year both globally and within Europe. Europe accounted for 49 per cent of global cannabis resin seizures in 2011 (down from 77 per cent in 2001).

65. Afghanistan and Myanmar continued to account for the majority of illicit opium poppy cultivation worldwide, with 84 per cent of global opium cultivation taking place in those countries. In 2012, opium poppy cultivation in Afghanistan covered 154,000 ha, an increase of 18 per cent compared to the previous year. However, since plant diseases and bad weather had damaged crops, potential opium production fell 36 per cent over the same period. In Myanmar, cultivation increased by 17 per cent to 51,000 ha and estimated opium production increased by 12 per cent to 690 tons. In 2011, seizures of opium remained at levels similar to the previous year, while seizures of heroin decreased in Europe and worldwide.

66. The cultivation of coca bush remained concentrated in the Plurinational State of Bolivia, Colombia and Peru. The total area under coca bush cultivation was stable in 2011. Global seizures of cocaine dropped slightly in 2011, and a small increase in cocaine seizures was recorded by countries in Europe.

67. The clearest trend to emerge from the 2011 data is the increase in global seizures of methamphetamine. In recent years, the global market for methamphetamine has expanded significantly. After relatively stable levels of seizures leading up to 2008, the annual amount of methamphetamine seized globally increased rapidly to nearly 88 tons in 2011. The level of global seizures of methamphetamine in 2011 is more than three times the level recorded in 2008. In 2011, European countries accounted for a small, but increasing, share of global methamphetamine seizures.

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