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**Twenty-third Meeting of Heads of National
Drug Law Enforcement Agencies, Latin
America and the Caribbean**

Quito, 30 September-4 October 2013

Item 3 of the provisional agenda**

**Major regional drug trafficking trends and
countermeasures****Statistics on drug trafficking trends in the Americas and
worldwide****Report of the Secretariat***Summary*

This report provides an overview of the latest trends in illicit drug production and trafficking in the Americas and worldwide, with a specific focus on Latin America and the Caribbean. The statistics and analysis in this report are based on the latest information available to the United Nations Office on Drugs and Crime.

Three countries — Bolivia (Plurinational State of), Colombia and Peru — continued to account for virtually all cultivation of coca bush worldwide. The total area under coca bush cultivation was stable in 2011. Latin America and the Caribbean continue to account for the majority of global cocaine production and seizures. In 2011, over 70 per cent of global cocaine seizures were attributable to countries in Latin America and the Caribbean.

Cannabis continues to be the most widely cultivated, produced, trafficked and consumed drug worldwide, and cannabis cultivation continues to occur in most countries in the Americas. Global cannabis herb seizures decreased in 2011 and seizures in the Americas also decreased from 5,407 tons in 2010 to 4,779 tons in 2011. Global cannabis resin seizures decreased for the third consecutive year. Due to differences in consumption preferences, cannabis is mainly consumed in the form of

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

** UNODC/HONLAC/23/1.



cannabis herb in the Americas and less than 0.1 per cent of global cannabis resin seizures can be attributed to countries in the Americas.

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. Seizures of heroin decreased in South America, Central America and the Caribbean but increased in North America in 2011.

The clearest trend to emerge from the 2011 data is the increase in global seizures of amphetamine-type stimulants. 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. Within the Americas, the subregion of North America accounted for the majority of seizures of amphetamine type stimulants.

There is a well-established culture of co-operation between law enforcement agencies in Latin America and the Caribbean and information is regularly exchanged between agencies. The majority of countries engage in joint law enforcement operations with other countries in the region.

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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 the sub regions of Central America, South America and the Caribbean. The term “Latin America” is used to refer to Central and South America and frequently statistics are presented for Latin America and the Caribbean collectively. The report also provides information about the sub region of North America and regional information about the Americas.
2. At the time of writing, eight¹ responses from the Americas to the 2012 Annual Reports Questionnaire were available for analysis. The timing of writing necessitates restricting the majority of analysis to the end of 2011. However, some 2012 data has been used where available and country reports from the 2012 meetings of the Heads of National Drug Law Enforcement Agencies² are used as an important source of recent information.
3. Section II of this report covers illicit drug crop cultivation and the production of plant-based drugs. Cultivation and production data is based on the latest illicit crop monitoring surveys published by UNODC.
4. Section III of this report presents statistics on global seizures of cannabis, opiates, cocaine and amphetamine-type stimulants. The section has a specific focus on seizures in the Americas. The primary source of information on seizures and drug trafficking is replies to the Annual Reports Questionnaire, part IV (illicit supply of drugs), submitted by Governments for 2011 and previous years. Replies to the 2011 Annual Reports Questionnaires were submitted by 97 Member States and territories, including 15 states in the Americas.³
5. Section IV of this report highlights activities undertaken by countries in the Americas to reduce the supply of illicit drugs. The section covers domestic activities, cross-border international cooperation and international technical cooperation activities that took place during 2010 and 2011. Analysis in section IV is based Member States responses to supply reduction questions in part II (comprehensive approach to drug demand reduction and supply) of the Annual Reports Questionnaire.
6. Statistics on drug seizures offer valid, indirect indicators of trafficking trends. However, they should be treated with caution, as they also reflect different reporting practices and also depend on the level and effectiveness of law enforcement capacities.

¹ Bolivia (Plurinational State of), Brazil, Columbia, El Salvador, Mexico, Peru, Uruguay and Venezuela (Bolivarian Republic of).

² Primarily from the Twenty-second Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean, Antigua, Guatemala, 1-5 October 2012.

³ Argentina, Bolivia (Plurinational State of), Brazil, Canada, Chile, Colombia, Costa Rica, Ecuador, Honduras, Jamaica, Mexico, Peru, United States of America, Uruguay, Venezuela (Bolivarian Republic of).

II. 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. That makes assessing 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. Country reports provided by Member States to the previous HONLEA Latin America and the Caribbean⁴ meeting, and responses to the Annual Reports Questionnaires, indicate that the demand for cannabis herb is often met by local production. Over the past two decades, production of cannabis has become more localized with production occurring closer to major consumer markets. In the Americas, most of the shift occurred between 1991 and 2001, with production shifting from South America, especially Columbia, closer to consumer markets in North America. The amount of cannabis herb seized in South America decreased from 25 per cent of global seizures in 1991 to 7 per cent in 2001. Over the ten years from 2001 to 2011, seizures of cannabis herb in South America have generally been more stable and accounted for, on average, 10 per cent of global seizures.

9. Due to differences in consumption preferences, cannabis is mainly consumed in the form of cannabis herb in the Americas. There is only limited production of cannabis resin in the region. During 2011, seizures of cannabis herb were over 800 times higher than seizures of cannabis resin in the region.

10. Morocco remains one of the world's largest producers of cannabis resin. 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.

11. In addition to Morocco, Afghanistan is also a major source country for cannabis resin. 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.

B. Opium

12. 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 global

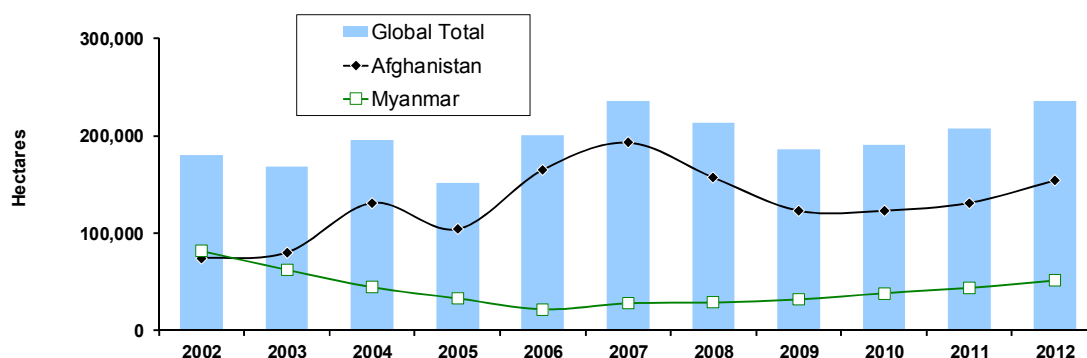
⁴ Country reports from the 22nd meeting of the Heads of National Drug Enforcement Agencies, Latin America and the Caribbean, Guatemala, 1-5 October 2012.

opium cultivation having occurred in those two countries. The global area under opium poppy cultivation increased by 15 per cent to 236,320 hectares in 2012.⁵

Figure I

Illicit opium poppy cultivation worldwide, 2002-2012

(Hectares)



13. Afghanistan remains the main country cultivating opium poppy. According to the 2012 Afghanistan opium survey, opium poppy cultivation in Afghanistan covered 154,000 ha in 2012, 18 per cent more than the 131,000 ha recorded the previous year. 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 decrease 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. Ghor province in the west lost its “poppy-free” status in 2012, while Faryab province in the north regained it.

14. In 2012, 95 per cent of Afghanistan opium poppy cultivation was concentrated in the southern and western provinces. The southern provinces of Helmand, Kandahar, Oruzgan, Daykundi 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. Farah, Heart and Nimroz in the west accounted for 23 per cent of opium poppy cultivation.

15. 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 was down by 57 per cent to \$4,600 in 2012, from \$10,700 in 2011.

16. In South-East Asia, opium poppy cultivation has historically 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 followed a

⁵ United Nations Office on Drugs and Crime, *World Drug Report 2013*.

generally increasing trend after that year, reaching 51,000 ha in 2012. While still small in comparison with the peak level of 1996, the area under opium poppy cultivation in Myanmar in 2012 (51,000 ha) is 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.

17. 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 is still very small in comparison with the level registered in the period 1996-1999 but represented the fifth year-on-year increase and amounted to over four times the level observed in 2007 (1,500 ha). The aerial survey conducted by UNODC in 2012 revealed the existence of opium poppy cultivation in four of the six provinces in northern Lao People's Democratic Republic, 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.

18. 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, Mexico reported the eradication of 16,389 ha under cultivation in 2011. Authorities of that country reported that opium resin is trafficked mostly by land and is produced from opium poppy cultivated mainly on the Pacific coast.⁶

19. In Colombia, a total of 341 hectares under opium poppy cultivation was detected in 2011 and 304 hectares of opium poppy were eradicated.

C. Coca

20. Three countries — Bolivia (Plurinational State of), Colombia and Peru — continued to account for virtually all cultivation of coca bush worldwide. The total area under cultivation was stable in 2011, the balance of slight increases in Colombia and Peru and a decrease in Bolivia (Plurinational State of). 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. Nevertheless, there were also indications of limited processing of cocaine in neighbouring countries, with laboratories seized in Ecuador, Mexico and Venezuela (Bolivarian Republic of) in 2011. Facilities detected in Europe in recent years were predominantly secondary extraction laboratories, which recovered cocaine impregnated, dissolved or incorporated into other substances or materials.

21. In the Plurinational State of Bolivia, coca bush cultivation decreased, amounting to 27,200 ha in 2011, down from 31,000 ha in 2010. The Yungas region 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 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

⁶ Country report of Mexico, Twenty-second Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean, Antigua, Guatemala, 1 to 5 October 2012.

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).

22. 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.

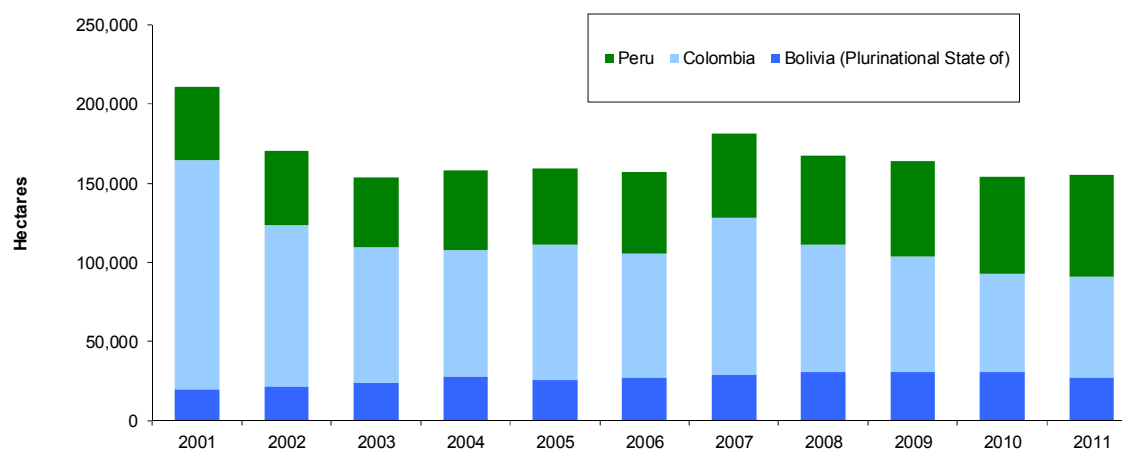
23. Coca bush cultivation was identified in 23 of the 32 departments of Colombia in 2011. Three provinces (Nariño, Guaviare and Putumayo) accounted for 54 per cent of the total. In Nariño, Guaviare, Putumayo and three other departments, the area under cultivation increased, which contributed to the 3 per cent 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 2001 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 Bolívar 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.

24. 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 far 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).

Figure II

Coca bush cultivation in Colombia, Peru and Bolivia (Plurinational State of), 2001-2011

(Hectares)



III. Trends in illicit drug trafficking

25. Cannabis herb and cocaine are the two most seized illicit drugs in Latin America and the Caribbean. In terms of seizures by weight, cannabis herb was the most seized drug in Latin America and the Caribbean during 2011 (791 tons), followed by cocaine (418 tons), and heroin (1 ton).

26. Seventy per cent of global cocaine seizures and fourteen per cent of global cannabis herb seizures occurred in Latin America and the Caribbean during 2011. The high percentage of global cocaine seizures in the region is perhaps unsurprising given that three Andean countries continue to account for virtually all global cultivation of coca bush. Seizures of the other illicit drugs in Latin America and the Caribbean accounted for less than 3 per cent of global seizures.

27. Table I shows the reported quantities of seized drugs for the major drug groups in 2010 and 2011 both globally and in Latin American and the Caribbean.

Table I

Drug seizures Latin America and the Caribbean (kilograms), 2010 and 2011

Drug	2010			2011		
	<i>Latin America and the Caribbean</i>	<i>Global Total</i>	<i>(Percentage)</i>	<i>Latin America and the Caribbean</i>	<i>Global Total</i>	<i>(Percentage)</i>
	<i>(Kilograms)</i>	<i>(Kilograms)</i>		<i>(Kilograms)</i>	<i>(Kilograms)</i>	
Cannabis herb	701,362	6,664,676	10.5	790,937	5,762,920	13.7
Cannabis resin	220	1,129,091	0.0	260	1,051,059	0.0
Cocaine ⁷	451,741	608,857	74.2	418,195	595,318	70.2
Opium	23	492,439	0.0	209	491,372	0.0
Illicit morphine	0	19,303	0.0	36	62,357	0.1
Heroin	2,869	80,986	3.5	1,010	75,997	1.3
Amphetamine	1	19,581	0.0	45	30,973	0.1
Methamphetamine	2	50,880	0.0	21	87,996	0.0
“Ecstasy”	97	3,792	2.6	105	3,673	2.9

A. Cannabis

Cannabis herb — Global trends

28. 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 tending 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

⁷ Includes coca paste/coca base, cocaine base, cocaine salts and crack.

from 5,525 to 6,664 tons per year. Seizures decreased from 6,665 tons in 2010 to 5,763 tons in 2011.

29. In 2011, the largest proportion of global cannabis herb seizures continued to occur in North America. Broken down by region, cannabis herb seizures in North America accounted 69 per cent of annual global seizures, seizures in Latin America and the Caribbean accounted for 14 per cent, Africa accounted for 9 per cent, Asia accounted for 5 per cent and Europe accounted for 3 per cent. Less than 1 per cent of global cannabis herb seizures occurred in Oceania.

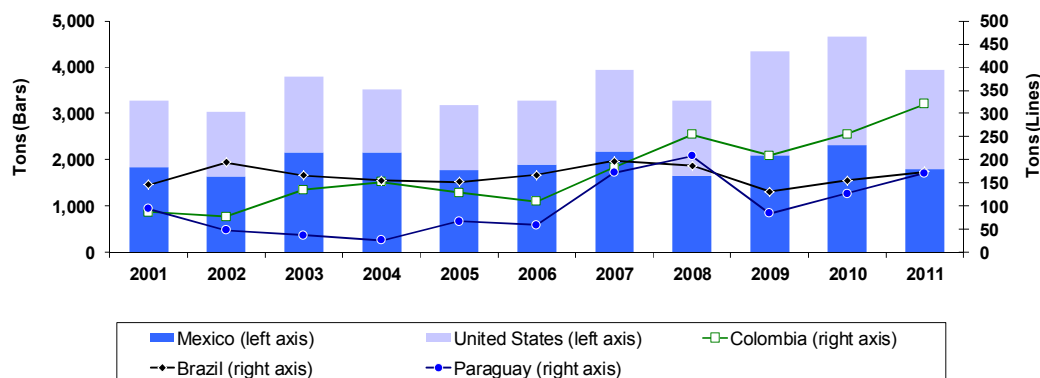
Cannabis herb — Americas

30. In 2011, the annual total of seizures of cannabis herb in the United States slightly exceeded seizures in Mexico. Seizures in Mexico peaked at 2,313 tons in 2010, and figures for 2011 show a 22 per cent decrease in total annual seizures, falling to 1,799 tons. In the United States, seizures decreased to 2,145 tons in 2011, below the peak of 2,342 tons recorded in 2010. Figure III shows seizures of cannabis herb in the Americas between 2001 and 2011.

31. In 2012, Mexico reported seizing 1,297 tons of cannabis herb, which represents a 28 per cent decrease from 2011. At the time of writing only partial information for the Americas was available. However, because Mexico has historically accounted for a relatively large share of global cannabis herb seizures, the latest decrease may be an early indication that cannabis herb seizures have decreased in the region and globally during 2012.

Figure III

Cannabis herb seizures in the Americas 2001-2011 (kilograms)



32. Mexico reported that cannabis is most commonly trafficked by land along routes leading from the production areas (mainly the state of Sinaloa) to the country's northern border. Transportation by sea is the second most common mode used to traffic cannabis. United States authorities reported that the increase in availability of cannabis herb in the country was most likely due to larger amounts of the drug being smuggled into the country and an increase in domestic cannabis cultivation.

33. Two countries in South America — Brazil and Colombia — seized significant quantities of cannabis herb in 2011. In Colombia, the number of seizure cases increased from 38,876 to 41,291, and the amount seized rose from 255 to 321 tons. In Brazil, the number of seizure cases was roughly the same in 2010 and 2011 (885 and 878 cases respectively), but the total amount of cannabis herb seized rose from 155 tons to 174 tons from 2010 to 2011. Table II shows seizures of cannabis herb in the Americas between 2007 and 2011 broken down by subregion.

Table II
Cannabis herb seizures in the Americas, 2007-2011
(Tons)

<i>Year</i>	<i>Caribbean</i>	<i>Central America</i>	<i>South America</i>	<i>North America</i>	<i>Rest of the world</i>	<i>Total</i>
2007	56	10	946	3,988	1,042	6,044
2008	57	11	796	3,309	1,456	5,629
2009	44	7	598	4,380	1,213	6,243
2010	92	105	504	4,705	1,258	6,665
2011	47	7	737	3,990	984	5,763

Cannabis resin — Global trends

34. In contrast with cannabis herb, 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. In 2011, twenty-eight countries seized over 1 ton of cannabis resin and thirteen of these countries were in Europe.

35. The largest annual seizure of cannabis resin occurred in Spain (356 tons). Spain seized more than 6 times the amount of cannabis resin than any other country in Europe and nearly 3 times more than Morocco. Spain has an important role in preventing cannabis resin from reaching other European countries due to the country's proximity to Morocco, a known source country for cannabis resin.

36. Spanish authorities reported⁸ that in the past decade, the quantities of hashish seized have shown a decreasing trend and that the average prices have been increasing, with one gram of hashish costing €5.28 in 2011, one per cent higher than in 2010 and 37 per cent higher than in 2002.

37. 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. Since 2001, the proportion of global cannabis resin seizures occurring in Europe has been trending down, and the proportion of cannabis resin seized in Africa and the Near and Middle East has been trending upwards. These trends are shown in Figure IV. The data suggests more seizures are occurring closer to the point of production rather than in the traditional consumer markets. In addition, the increase in seizures in the Near and Middle East suggests

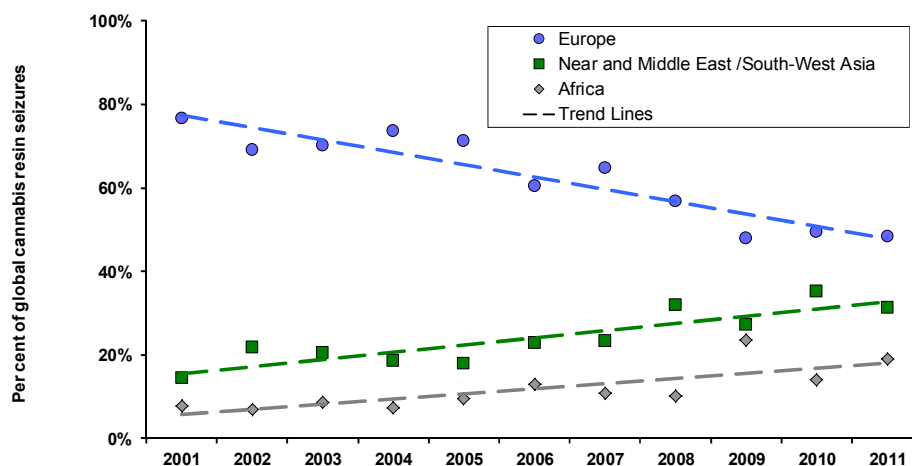
⁸ Country report of Spain, Twenty-second Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean Antigua, Guatemala, 1-5 October 2012.

cannabis resin originating from Afghanistan and Pakistan is becoming more prominent within the global market.

Figure IV

Cannabis resin seizures in selected regions, 2001-2011

(Per cent of global seizures)



Cannabis resin — Americas

38. Due to differences in consumption preferences, cannabis is mainly consumed in the form of cannabis herb in the Americas. During 2011, seizures of cannabis herb (marijuana) were over 800 times higher than seizures of cannabis resin (hashish) in the region. There is limited production of cannabis resin in the region and seizure data indicates that cannabis resin found in the Americas is generally produced in the Near and Middle East or Africa. The Americas accounted for only 0.5 per cent of global seizures of cannabis resin in 2011 with Canada accounting for the majority of these seizures. In total, six countries in the Americas reported seizures of cannabis resin in 2011.

39. Just less than 5 tons of cannabis resin was seized in Canada during 2011. Authorities reported over 99 per cent of the cannabis resin arrived in Canada by sea and originated from either the Near and Middle East or Africa. The United States reported seizing 272 kilograms of cannabis resin and Mexico reported seizing 9 kilograms during 2011. Brazil reported seizing 251 kilograms of cannabis resin in 2011 and was the only country in South America to report seizing any cannabis resin during 2011. In the Caribbean, Jamaica reported annual seizures of 9 kilograms and Cuba reported seizing less than a kilogram of cannabis resin.

B. Opiates

40. The estimated annual prevalence of opiate use is between 0.28 and 0.44 per cent of the adult population;⁹ the majority of these people are heroin users. As a

⁹ *World drug report 2013*.

result, heroin trafficking is of great concern. Seizures of opium and morphine continue to primarily occur within the Near and Middle East/South-West Asia, whereas seizures of heroin follow a much wider geographical distribution.

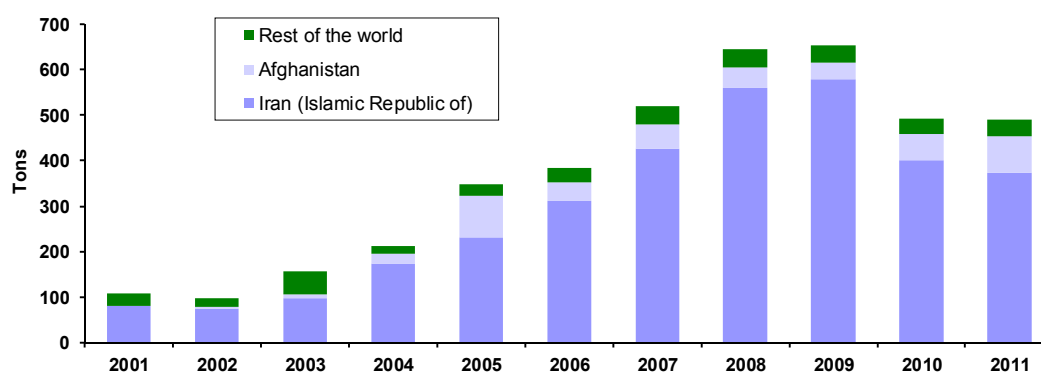
1. Opium

41. 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, three countries — Afghanistan, Iran (Islamic Republic of) and Pakistan — have consistently accounted for more than 90 per cent of global opium seizures.

42. The Islamic Republic of Iran has reported 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 2011.¹⁰ In 2011, opium seizures in Afghanistan increased for the second consecutive year to 80 tons, the highest level since 2005.

Figure V

Global opium seizures, 2001-2011 (Tons)



43. In North America, opium seizures have been increasing in recent years. Seizures in the United States increased for the third consecutive year to reach 2.1 tons in 2011. Similarly, in Mexico opium seizures increased for the third consecutive year to reach 1.5 tons in 2011. Two countries in Latin America and the Caribbean reported seizing over a kilogram of opium in 2011. Colombia seized 205 kilograms of locally produced opium and Peru seized 4 kilograms of opium.

2. Morphine

44. As is the case with opium, seizures of morphine continued to be concentrated in Afghanistan and neighbouring countries: every year from 2005 onwards, 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

¹⁰ Information provided by the Iranian National Drug Control Headquarters.

Middle East/South-West Asia had generally been decreasing between 2006 and 2010, however, morphine seizures within Afghanistan increased significantly in 2011, making the recent trend difficult to identify. Future data will reveal if the big increase in seizures for 2011 is a one-off spike, or if the increase signals the start of an increasing trend. Seizures amounted to 50.8 tons in Afghanistan, 6.8 tons in Iran (Islamic Republic of) and 4.3 tons in Pakistan.

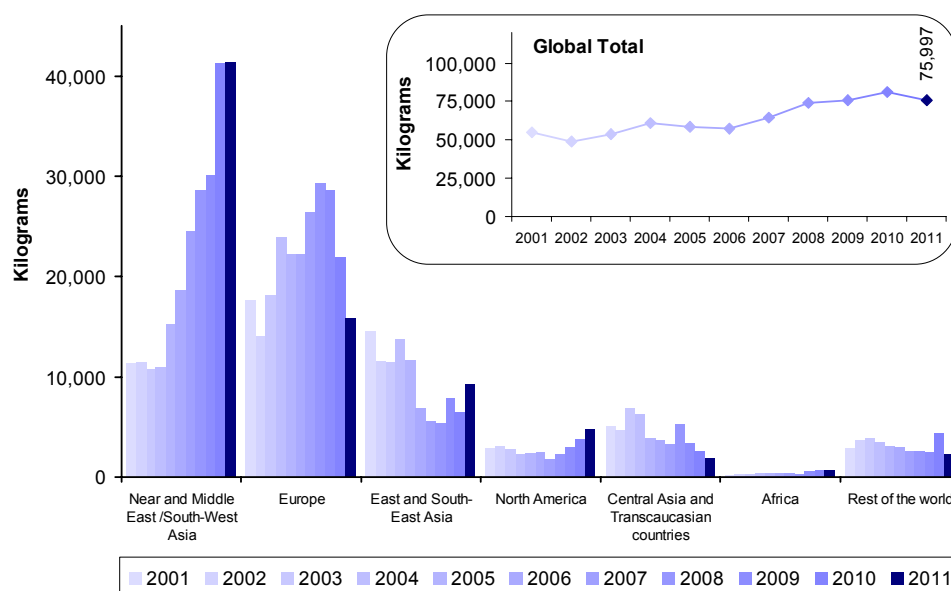
3. Heroin

Heroin — Global Trends

45. Global heroin seizures have been trending upward since 2002 (see figure VI), but dropped back to just under 76 tons in 2011 (from 81 tons in 2010). The annual decrease is due to a significant fall in seizures in Europe, particularly in South East Europe where seizures decreased for the second consecutive year. Seizures in East and South-East Asia and North America increased in 2011, while seizures in the Near and Middle East/South-West Asia stabilized after a sustained period of annual increases since 2004.

Figure VI

Global heroin seizures, 2001-2011 (Kilograms)



46. Between 2003 and 2010, seizures of heroin in Iran (Islamic Republic of) 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.¹¹ 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.

¹¹ Information provided by the Iranian National Drug Control Headquarters.

47. 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.¹²

48. While heroin seizures have been reducing in Europe in recent years, seizures have been increasing in North America. The United States, Mexico and Canada all 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 West 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 Southwest Border of the United States have increased steadily since 2007.

Heroin — Americas

49. Heroin seizures in the Americas reached 6.6 tons in 2010 and fell back to 5.7 tons in 2011. All countries in the region, except Canada, are supplied by heroin produced in the region.¹³

50. Heroin seizures in North America increased to reach 4.7 tons in 2011. The latest increase is the fourth consecutive annual increase in heroin seizures in North America. Seizures in Mexico increased from 0.4 tons in 2010 to 0.7 tons in 2011. However, the latest available data from Mexico's 2012 Annual Reports Questionnaire shows that seizure of heroin decreased to 0.2 tons in 2012. Seizures increased in United States from 3.2 tons in 2010 to 3.9 tons in 2011. US authorities indicated in the 2011 Annual Reports Questionnaires that 81 per cent of the heroin seized in the country arrived by land, 13 per cent by air and 6 per cent by mail.

51. Between 2001 and 2011, Colombia accounted for, on average, 56 per cent of heroin seizures in South America. This trend appears to have changed in 2012. Heroin seizures in the Columbia declined to 464 kilograms — the lowest level recorded in the country since 1998. However, Peru reported seizing 1,665 kilograms of heroin during 2012. Based on incomplete information for the sub region, heroin seizures in South America increased in 2012.

52. The majority of the 206 kilograms of heroin seized by countries in the subregion of Central America was seized in Panama (194 kilograms). While small on a global scale, the amount of heroin seized in the subregion of Central America has been stable since 2004 with annual seizures ranging between 100 and 300 kilogram since 2004.¹⁴

¹² 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.

¹³ *World drug report 2013*.

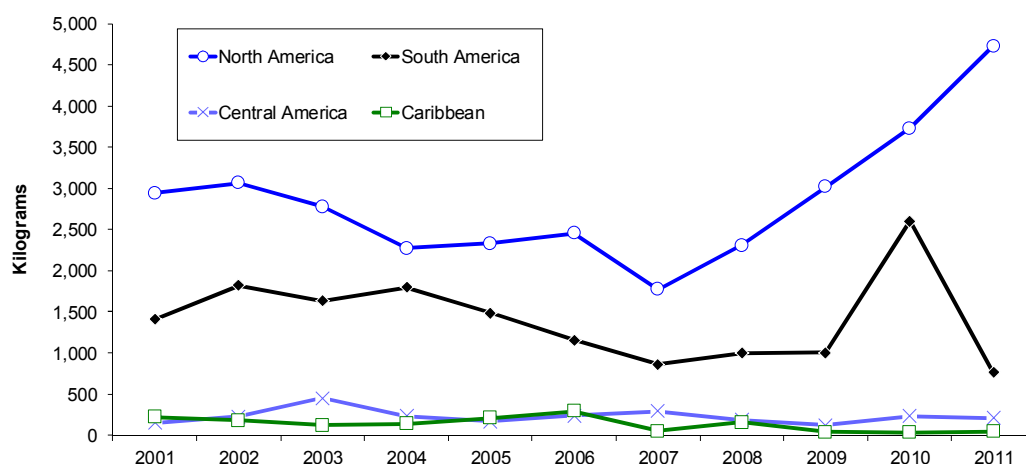
¹⁴ 2013 International Narcotics Control Strategy Report, US department of State.

53. Seizures in the Caribbean remained stable between 2010 and 2011. In terms of seizure weight, the Dominican Republic has accounted for over 75 per cent of the reported heroin seizures in the Caribbean since 2006. Forty-two kilograms were seized in the country during 2011 compared with 30 kilograms in 2010. A similar amount of heroin (39 kilograms) was seized in the Dominican Republic in 2012.

Figure VII

Heroin seizures in the Americas, 2001-2011

(Kilograms)

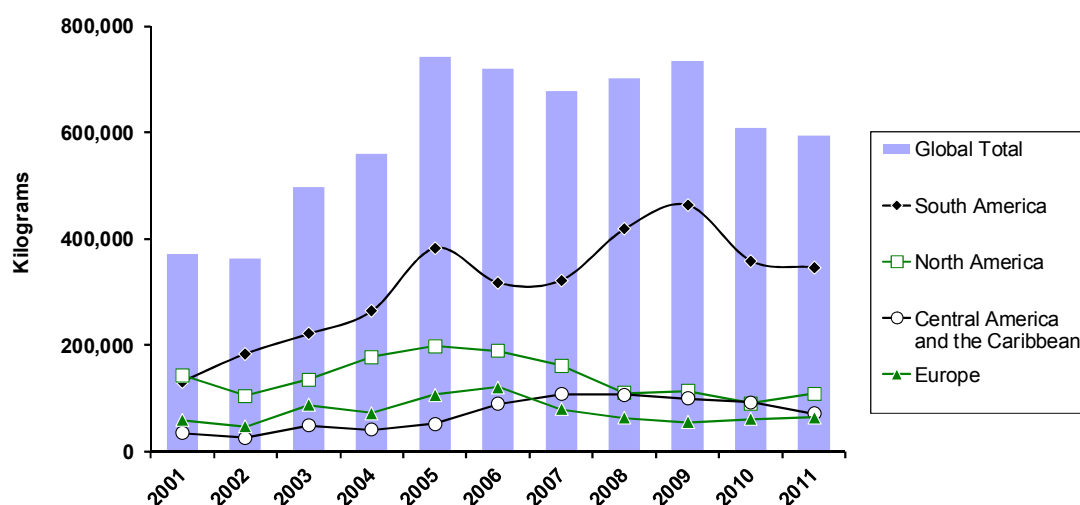


C. Cocaine

Cocaine — Global trends

54. 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 fairly 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 VIII shows the trend in selected regions and sub regions between 2001 and 2011.

Figure VIII
Global cocaine seizures, 2001-2011
 (kilograms)



Cocaine — Americas

55. Among South American countries, Colombia continued to seize the largest quantities of cocaine by far. Seizures in that country fell from 165 tons in 2010 to 146 tons in 2011. Seizures in Colombia rebounded to 188 tons in 2012. Colombian authorities reported that, in terms of quantity of cocaine seized, the most successful seizure operations were maritime operations.¹⁵ 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, by far the largest annual amount seized by that country.

56. In Peru, cocaine seizures fell by 7 tons to just under 11 tons in 2011 — the lowest level in the country 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.

57. According to Ecuadorean authorities,¹⁶ 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

¹⁵ 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.

¹⁶ 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, 3-7 October 2011.

cocaine in the 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.

58. 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.

D. Amphetamine-type stimulants

Amphetamine — Global trends

59. 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 in terms of total seizure quantities. 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.

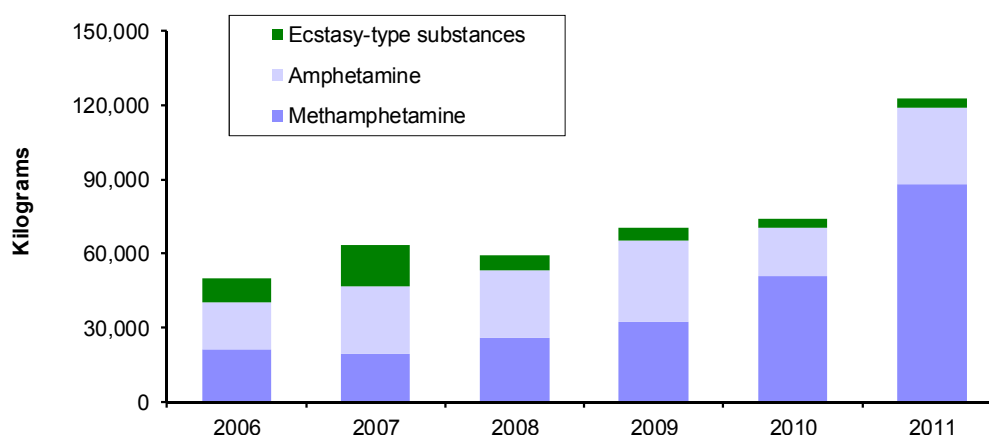
60. Saudi Arabia is a major consumer market for Captagon tablets and for the ninth consecutive year recorded the largest annual seizure of amphetamine by a single country. Seizures in Saudi Arabia rose from 8.8 tons in 2010 (52 million tablets) to 11.5 tons (67 million tablets). In the Syrian Arab Republic, 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.

Methamphetamine — Global trends

61. Between 2008 and 2011, the global market for methamphetamine expanded significantly (see figure IX). 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.

62. Seizures of methamphetamine in Mexico have risen sharply in recent years. In 2011, over 30 tons (30,740 kg) of methamphetamine were seized in Mexico, up from 13 tons in 2010; prior to 2009, seizures in Mexico had never exceeded 1 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).

Figure IX
Global amphetamine-type stimulant seizures, 2006-2011
 (Kilograms or equivalents)



63. Seizures of methamphetamine rose 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.

64. China continued to be affected by the manufacture, trafficking and consumption of methamphetamine. Throughout the period 2005-2009, annual methamphetamine seizures reported by China ranged between 6 tons and 7 tons; 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).

65. Thailand seized 9.6 tons of methamphetamine in 2011, up from 5.6 tons in 2010. Authorities in Thailand reported that methamphetamine pills remain the most abused and trafficked drug in Thailand and that the abuse of and trafficking in crystallized methamphetamine continues to escalate.¹⁷ 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.

¹⁷ 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 in Bangkok, from 30 October to 2 November 2012.

“Ecstasy”-type substances — Global trends

66. 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.

67. The majority of ecstasy seizures occurred in North America and Europe. 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). Four of the six other countries who seized over 100 kilograms of ecstasy-type substances 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.

Amphetamine-type stimulants — Americas

68. Within the Americas during 2011, the subregion of North America accounted for 91 per cent of seizures of ecstasy-type substances, 93 per cent of amphetamine seizures and 99 per cent of methamphetamine seizures.

69. In the Caribbean, seizures of ecstasy-type substances were reported in two countries — the Dominican Republic (1.5 kilograms) and Jamaica (less than 100 grams). No seizures of methamphetamine or amphetamine were reported to UNODC by Caribbean countries in the 2011 Annual Reports Questionnaire.

70. In Central America, Costa Rica seized 5.2 kilograms of ecstasy-type substances in 2011. No seizures of methamphetamine or amphetamine were reported to UNODC in the 2011 Annual Reports Questionnaire by countries in Central America.

71. Nine countries in South America reported seizures of ecstasy-type substances in 2011, with the largest quantities occurring in Brazil (the equivalent of 70 kilograms) and Uruguay (the equivalent of 16 kilograms). In its 2012 Annual Reports Questionnaire, Brazil reported an increase in both the number of ecstasy tablets seized and the number of seizure cases. Argentina and Brazil were the only two countries in South America which reported seizures of methamphetamine in 2011 — Argentina seized 9 kilograms and Brazil seized 12 kilograms.

IV. Supply reduction activities: Latin America and the Caribbean

Analysis of ARQ Part II

72. This section provides a brief summary of the responses from Latin America and the Caribbean countries to a portion of Part II of the Annual Reports Questionnaire. Part II of the questionnaire is titled “Comprehensive approach to drug demand reduction and supply” and approximately half of Part II is devoted to questions related to reducing the supply of illicit drugs. Questions 16 to 37 of the questionnaire ask about domestic supply reduction activities, cross-border and

international cooperation, international technical cooperation, and the control of precursors.

73. The current set of survey questions was first used by UNODC in the 2010 Annual Reports Questionnaire. Ninety-three countries completed part II of the questionnaire in 2010, and ninety-one countries completed part II in 2011. At the time of writing, 2012 data was available for 20 countries. Consequently, analysis is based on responses to the 2010 and 2011 survey.

74. The majority of the analysis is based on a combination of the responses to the 2010 and 2011 survey, rather than a comparison between 2010 and 2011. In 2010, eleven countries from Latin America and the Caribbean completed part II of the Annual Reports Questionnaire and eleven countries also responded in 2011. Eight countries completed the survey in both 2010 and 2011. For those countries that provided a response in both 2010 and 2011, the latest response has been used in the analysis.

Domestic activities

75. There was no change between 2010 and 2011 in the number of countries reporting having an approved written strategy with a supply reduction component in place. In both 2010 and 2011, only one country in Latin America and the Caribbean reported that no strategy was in place.

76. The survey asked Member States about activities undertaken to reduce the supply of illicit drugs. During 2010 and 2011, 100 per cent of responding countries in Latin America and the Caribbean reported the monitoring of amphetamine-type stimulants and illicit substances, 89 per cent reported the use of forensic intelligence and the monitoring precursor chemicals, 83 per cent reported undertaking research and evaluation activities, and 83 per cent also reported undertaking programmes for the eradication of illicit drug crops. Sixty three per cent of responding countries reported that alternative development activities took place. These countries were Bolivia (Plurinational State of), Brazil, Colombia, Ecuador, Guatemala, Peru and Venezuela (Bolivarian Republic of).

77. In all responding countries, the police, customs or a specialized drug law enforcement agency had a mandate to reduce drug supply. The military is mandated to reduce drug supply in 81 per cent of countries.

78. All responding countries in Latin America and the Caribbean reported using informants as an investigative technique to gather evidence and 92 per cent of countries reported using undercover techniques during the survey period. A similar percentage (90 per cent) of countries reported using electronic surveillance. Slightly fewer states (80 per cent) reported using controlled delivery as an investigative technique.

79. Only 20 per cent of countries in the region had a system in place to monitor the sale of pharmaceutical preparations containing narcotic drugs or psychotropic substances under international control over the Internet.

Cross-border and international cooperation

80. The data suggests a well-established culture of co-operation between law enforcement agencies in the region. All responding member states reported

exchanging information with law enforcement officials in different countries and ninety per cent of countries reported engaging in joint operations with other countries. The practice of exchanging liaison officers is common in the region with ninety-two per cent of countries having reported exchanging liaison officers during 2010 and 2011. Nearly all of the countries which undertook joint operations were able to provide examples of joint operations that resulted in the disruption of criminal organizations and the seizure of illicit substances.

81. Seventy per cent of countries from Latin America and the Caribbean identified slow formal procedures as a problem in cooperating with counterparts in other countries. Fewer countries (30 per cent) identified the lack of agreements enabling operational cooperation/mutual legal assistance and lack of cooperation from counterparts as problems.

International technical cooperation

82. All responding countries from Latin America and the Caribbean reported receiving technical assistance in the area of drug supply reduction either from another country or from an international organization. Of these countries, all (100 per cent) received training, 80 per cent received data sharing assistance, 60 per cent received software, 55 per cent received equipment and 55 per cent also received financial assistance. Only two countries (17 per cent) reported the assistance was sufficient for the needs of the country.

83. Nine countries reported providing assistance, mainly in the form of training, to other countries in the region.

V. Conclusions

84. Three countries — Bolivia (Plurinational State of), Colombia and Peru — continued to account for virtually all cultivation of coca bush worldwide. The total area under coca bush cultivation was stable in 2011. Latin America and the Caribbean continue to account for the majority of global cocaine production and seizures. In 2011, over 70 per cent of global cocaine seizures were attributable to countries in Latin America and the Caribbean.

85. Cannabis continues to be the most widely cultivated, produced, trafficked and consumed drug worldwide, and cannabis cultivation continues to occur in most countries in the Americas. Global cannabis herb seizures decreased in 2011 and seizures in the Americas also decreased from 5,407 tons in 2010 to 4,779 tons in 2011. Global cannabis resin seizures decreased for the third consecutive year. Due to differences in consumption preferences, cannabis is mainly consumed in the form of cannabis herb in the Americas and less than 0.1 per cent of global cannabis resin seizures can be attributed to countries in the Americas.

86. 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. Seizures of heroin decreased in South America, Central America and the Caribbean but increased in North America in 2011.

87. The clearest trend to emerge from the 2011 data is the increase in global seizures of amphetamine-type stimulants. 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. Within the Americas, the subregion of North America accounted for the majority of seizures of amphetamine type stimulants.

88. There is a well-established culture of co-operation between law enforcement agencies in Latin America and the Caribbean. Information is regularly exchanged between law enforcement agencies in different countries and the majority of countries have recently engaged in joint operations with other countries in the region.
