

10 May 2012

Arabic, English and French only*

**Twenty-second Meeting of the Heads of
National Drug Law Enforcement Agencies,
Africa**

Accra, 25-29 June 2012

Item 3 of the provisional agenda**

**Current situation with respect to regional and subregional
cooperation in countering drug trafficking****Statistical analysis of drug trafficking trends in Africa and
worldwide*******Report of the Secretariat***Summary*

The present report provides an overview of the latest trends in illicit drug production and trafficking in Africa and worldwide. The statistics and analysis in the report are based on the information available to the United Nations Office on Drugs and Crime as of March 2012. In respect of seizure statistics, the report focuses on 2009 and, where available, 2010. With regard to illicit drug crop cultivation and illicit drug production, the report focuses on the period 2009-2011.

Cannabis continues to be the most widely produced, trafficked and consumed worldwide. Morocco and Afghanistan remain the major contributors of cannabis resin. Global seizures of cannabis herb and resin reflect approximately 11 per cent and 25 per cent as coming from Africa respectively.

In 2011, the decline in opium production observed in 2010 was largely reversed. However, seizures in Africa generally remain low, with the highest seizures in Southern and North Africa.

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

** UNODC/HONLAF/22/1.

*** The present document was submitted late owing to the late receipt of information.



In 2010, coca bush cultivation remained concentrated in Colombia, Peru and the Plurinational State of Bolivia; with a continued decline in the latter. Major destinations remain North America and West and Central Europe, however a negligible amount of cocaine was seized in Africa.

In 2010, the global supply chain of amphetamine-type stimulants continued to evolve in terms of the extent of manufacture, patterns in trafficking routes and nature of substances involved. Methamphetamine-type stimulants (ATS) started to emerge primarily in South Africa, and seizures of amphetamine were reported in Zambia.

Contents

	<i>Page</i>
I. Introduction	4
II. Global trends in illicit drug crop cultivation and the production of plant-based drugs, up to 2011	4
A. Cannabis	4
B. Opium	5
C. Coca	6
III. Trends in drug trafficking, up to 2010	7
A. Cannabis	7
B. Opiates	9
C. Cocaine	11
D. Amphetamine-type stimulants	12
Table	
Global and Africa drug seizures, 2009 and 2010	7
Figures	
I. Opium poppy cultivation worldwide, 2000-2011	5
II. Cannabis herb seizures in Africa, 2000-2010	8
III. Global opium seizures, 2000-2010	10
IV. Heroin seizures in Africa, 2000-2010	11
V. Trends in cocaine seizures in Africa, 2010 in comparison with 2009, by region	12
VI. Breakdown of amphetamine seizures in Africa, 2000-2010	13

I. Introduction

1. The present report provides an overview of developments in the production of and trafficking in the main illicit drugs at the global and regional levels. Analysis is based on the latest information available to the United Nations Office on Drugs and Crime (UNODC), and is intended to support efforts by national Governments to combat illicit drug production and trafficking, and enhance coordination at regional and subregional levels.
2. The report addresses the illicit cultivation of coca bush, opium poppy and cannabis for the years up to and including 2010 and, where available, 2011. With regard to drug trafficking, the report focuses on seizure statistics for 2009 and 2010 and supplies an update on trafficking trends in opiates, cannabis, cocaine and amphetamine-type stimulants.
3. Information on illicit drug crop cultivation and illicit production of plant-based drugs was drawn from the results of the latest illicit crop monitoring surveys published by UNODC. The primary sources of information on drug trafficking were the replies submitted by Governments to part III (Illicit supply of drugs) of the annual reports questionnaire for 2009 and previous years, and part IV (Extent and patterns of and trends in drug crop cultivation and drug manufacture and trafficking) of the revised annual reports questionnaire for 2010.
4. At the time of preparation of the present report,¹ UNODC had received replies to part IV of the annual reports questionnaire for 2010 from 86 Member States and 1 territory. Supplementary sources of information included reports on significant individual drug seizures, published official Government reports, the Drug Abuse Information Network for Asia and the Pacific (DAINAP) and other reports received by UNODC or submitted to the Commission on Narcotic Drugs and its subsidiary bodies.
5. In general, 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 depend on the level and effectiveness of law enforcement capacities.

II. Global trends in illicit drug crop cultivation and the production of plant-based drugs, up to 2011

A. Cannabis

6. Unlike illicit crops such as coca leaf and opium poppy, cannabis lends itself to diverse cultivation methods, being easily grown in varied environments. This makes assessing the extent of its cultivation and production difficult. However, reports of cultivation together with indirect indicators, such as seizures of cannabis plant, suggest that cultivation of cannabis and production of cannabis herb occurred in most countries worldwide.

¹ As of 31st December 2011.

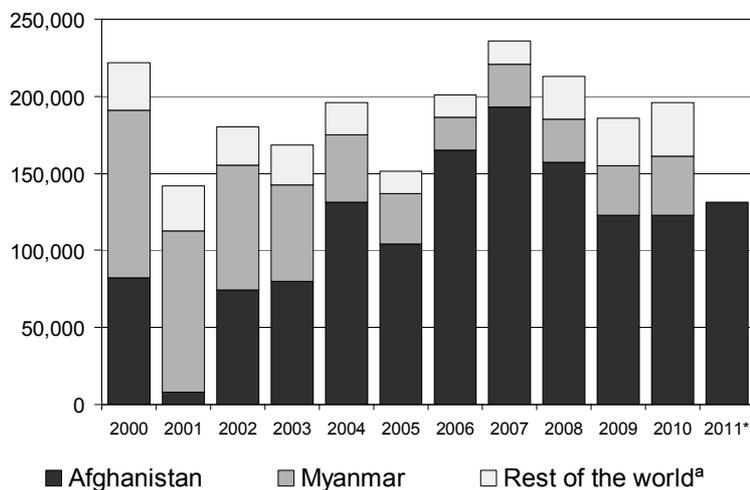
7. In contrast, production of cannabis resin tended to be concentrated in fewer countries, of which Morocco and Afghanistan were the most prominent. The most recent cannabis survey conducted by UNODC in Morocco took place in 2005. The total area under cannabis cultivation in that country was estimated at 72,500 hectares (ha) in 2005. Morocco estimated the net area under cannabis cultivation (after eradication) at 60,000 ha in 2008 and 47,500 ha in 2010.

8. In 2010, UNODC and the Government of Afghanistan jointly carried out a survey on cannabis cultivation in Afghanistan, and the results showed that cannabis has become a competitor to opium poppy as a lucrative crop for farmers in the country. Although the extent of cultivation and production could only be estimated as ranges with a significant level of uncertainty, Afghanistan had clearly become one of the most important countries worldwide in terms of cannabis resin production. The area under cultivation was estimated between 9,000 and 29,000 ha, and production of cannabis resin between 1,200 and 3,700 tons.

B. Opium

9. In 2010, the area under illicit opium poppy cultivation was estimated at 195,677 ha globally, only slightly more than the level in 2009 (185,935 ha). In 2010 Afghanistan accounted for 63 per cent of the total, continuing to be by far the country with the largest area under cultivation. See figure I. In 2010 the opium poppy crop in Afghanistan was severely affected by disease, so that opium production declined significantly in this country, and consequently at a global level. Global opium poppy production in 2010 was estimated at 4,860 tons, down from 7,853 tons in 2009. However, in 2011 the decline in opium production in Afghanistan was largely (though not entirely) reversed.

Figure I
Opium poppy cultivation worldwide, 2000-2011*
(Hectares)



* For 2011, data were available for Afghanistan only.

10. In 2011, opium poppy cultivation in Afghanistan reached 131,000 ha, up from 123,000 ha in 2010, while opium production amounted to 5,800 tons, rising significantly on the level in 2010 (3,600 tons) but still below the levels in 2006-2008. Although the southern and western regions continued to account for more than 95 per cent of the area under cultivation in 2011, cultivation of opium poppy on a non-negligible scale re-emerged in two provinces in the Northern region (Baghlan and Faryab) and one province in the eastern region (Kapisa), so that the number of poppy-free provinces fell from 20 to 17. The province of Hilmand continued to account for approximately one half of opium poppy cultivation in Afghanistan. Significant increases were registered in the provinces of Uruzgan and Farah.

C. Coca

11. The three countries of Bolivia (Plurinational State of), Colombia and Peru continued to account for virtually all cultivation of coca bush worldwide. The total area under cultivation fell slightly in 2010, due to a continued decreasing trend in Colombia. The illicit extraction of cocaine alkaloids from coca leaves, a first step in the manufacture of cocaine, was believed to take place exclusively in these three countries, which also accounted for the majority of cocaine hydrochloride manufactured worldwide. Nevertheless, there were also indications of some processing of cocaine, on a limited scale, in neighbouring countries, with laboratories being seized in 2009 in Argentina, Ecuador² and the Republic of Venezuela, as well as Mexico. Facilities detected in Europe in recent years were predominantly secondary extraction laboratories, where cocaine was recovered after having been impregnated, dissolved or otherwise incorporated within other substances or materials.

12. Year-on-year decrease. While cultivation was identified in 23 of the country's 32 departments in 2010, eight of these (Nariño, Cauca, Guaviare, Antioquia, Putumayo, Córdoba, Bolívar and Chocó) accounted for more than three quarters of the total. The decline was most pronounced in the Meta-Guaviare region, but decreases were registered in all the major growing regions; the Pacific region continued to account for more than one third of the total. In 2010, 44,000 ha under coca bush cultivation were manually eradicated in Colombia, and 102,000 ha were eradicated by aerial spraying. Moreover, 2,651 laboratories³ were seized in 2010.

13. Due to the ongoing revision of conversion factors used to arrive at estimates for the manufacture of cocaine, estimates of cocaine manufacture in 2009 and 2010 for the Plurinational State of Bolivia and for Peru were unavailable at the time of preparation of the present report. However, global production of cocaine was estimated in the range of 842 tons to 1,111 tons in 2009 and 786 tons to 1,054 tons in 2010.

² UNODC, *Ecuador - Monitoreo de Cultivos de Coca 2009*, June 2010.

³ Including establishments manufacturing cocaine hydrochloride as well as intermediate products such as cocaine base and coca paste.

III. Trends in drug trafficking, up to 2010

14. The table below shows the quantities of the major drug types seized globally in 2009 and 2010. It is important to note that the totals for 2010 are preliminary, as some States had not submitted their response to part IV of the annual reports questionnaire for 2010 at the time of writing. The most notable trends which emerge from these statistics are in the category of amphetamine-type stimulants, which exhibited a shift from amphetamine to methamphetamine, and the category of opiates, with seizures of opium and morphine in decline, possibly impacted by the drop in opium production in Afghanistan in 2010.

Table
Global and Africa drug seizures, 2009 and 2010

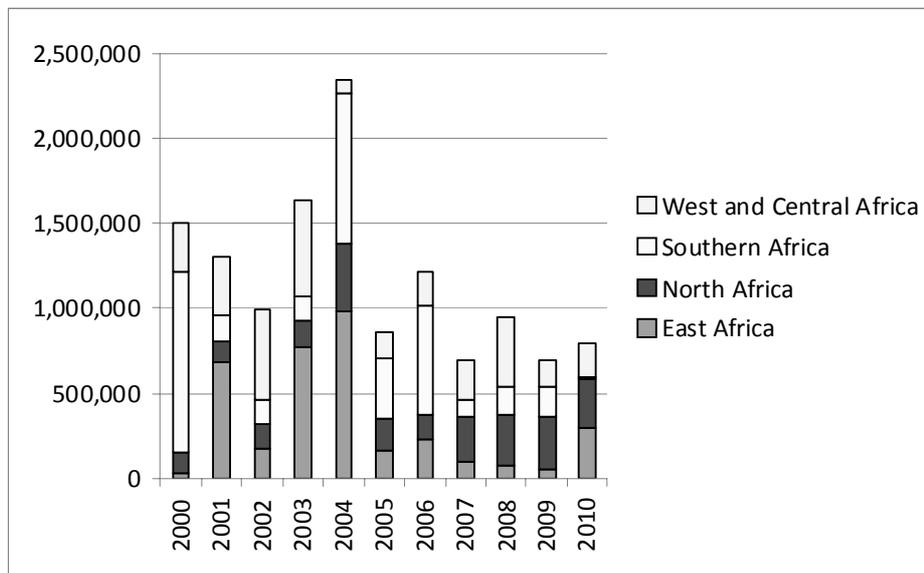
<i>Type of Drug</i>	<i>2009</i>		<i>2010</i>	
	<i>Africa</i>	<i>World</i>	<i>Africa</i>	<i>World</i>
Marijuana (herb)	692,826	6,068,263	799,398	6,250,774
Hashish (resin)	320,645	1,258,552	157,045	1,136,278
Opium	57	653,021	50	492,439
Illicit morphine	1	23,710	11	19,303
Heroin	525	75,844	684	81,168
Cocaine	1,691	732,410	996	694,590
ATS	128	70,406	33	68,200

A. Cannabis

1. Cannabis herb

15. Given the relative ease with which cannabis herb may be produced, demand for this drug could often be met by local production, resulting in a pattern where trafficking flows tended to be rather localized in comparison with other plant-based drugs. Cannabis herb continued to be consumed, trafficked and produced in most countries worldwide. Partial data for 2010 suggest that global cannabis herb seizures remained stable in comparison with 2009. Significant quantities of cannabis herb were seized in all regions worldwide, with the largest quantities being registered by countries in North America, South America and Africa. See figure II.

Figure II
Cannabis herb seizures in Africa, 2000-2010



16. The largest quantities of cannabis herb worldwide continued to be registered in Mexico, with seizures in this country reaching 2,105 tons in 2009 and 2,257 tons in 2010.

17. Several African countries also recorded large annual totals of cannabis herb seizures. Seizures rose sharply in the United Republic of Tanzania, from 56 tons in 2009 to 280 tons⁴ in 2010, and in Egypt, from 63 tons in 2009 to 107 tons in 2010. Morocco continued to seize large quantities of “kif”, a dried form of cannabis which can be further processed into cannabis resin.⁵ Seizures of “kif” in Morocco fell from 223 tons in 2009 to 187 tons in 2010. In 2009, cannabis herb seizures amounted to 126 tons in South Africa, 115 tons in Nigeria and 38 tons in Zambia.

18. Although seizure data for 2010 were not available, over the period August 2010 to June 2011 a further 155 tons of cannabis herb were seized in Nigeria.⁶

19. The United States seized comparable amounts of cannabis herb, with the annual totals reaching 2,049 tons in 2009 and 1,931 tons in 2010. The United States assessed that 44 per cent of drugs seized in 2010 originated in Mexico, with only 7 per cent originating in the United States itself, and with a large proportion (44 per cent) of unknown origin. Apart from land, trafficking by mail accounted for a

⁴ Direct communication by Tanzanian authorities.

⁵ H. Stambouli, A. El Bouri, M. A. Bellimam, T. Bouayoun and N. El Karn, *Cultivation of Cannabis sativa L. in northern Morocco*, Bulletin on Narcotics Volume LVII, Nos. 1 and 2, 2005.

⁶ Country report by Nigeria, Twenty-first Meeting of Heads of National Drug Law Enforcement Agencies, Africa, Addis Ababa, 5-9 September 2011.

significant proportion (more than one fifth) of cannabis herb seized on its way into the United States.

20. Several countries in South America reported large quantities of seized cannabis herb in 2009 and 2010. In Colombia, seizures rose from 209 tons in 2009 to 255 tons in 2010. Brazil registered seizures of 155 tons in 2010, and in Paraguay, which has been associated in the past with extensive cultivation of cannabis, seizures reached 84 tons in 2009.

21. India reported seizures of 173 tons in 2010, and assessed that 18 per cent of this originated in Nepal. Nepal seized 17 tons of cannabis herb in 2009. In Indonesia, seizures fell sharply, from 111 tons in 2009 to 23 tons in 2010. On the other hand, the increasing trend in cannabis herb seizures in Turkey, where seizures stood at 5.5 tons in 2002, continued into 2010, with seizures reaching 44 tons in 2010.

2. Cannabis resin

22. In contrast with cannabis herb, production of cannabis resin was concentrated in a small number of countries, among which the most prominent were Morocco and Afghanistan. Consequently, trafficking of cannabis resin followed more distinct flows, with large quantities reaching Europe (mainly via Spain) from Morocco and Pakistan from Afghanistan.

23. In Morocco, seizures of cannabis resin reached a record level — 188 tons — in 2009, but in 2010 receded to a quantity — 119 tons — comparable to those recorded prior to 2009. Morocco noted the emergence of a new pattern of trafficking cannabis by means of light aircraft, and attributed the decline in seizures to efforts by authorities both within the country, to counter cultivation of cannabis, as well as along the frontier, notably the northern coast. Seizures in Algeria followed a trend similar to that in Morocco, with a sharp rise to 75 tons in 2009 followed by a drop to 23 tons in 2010.

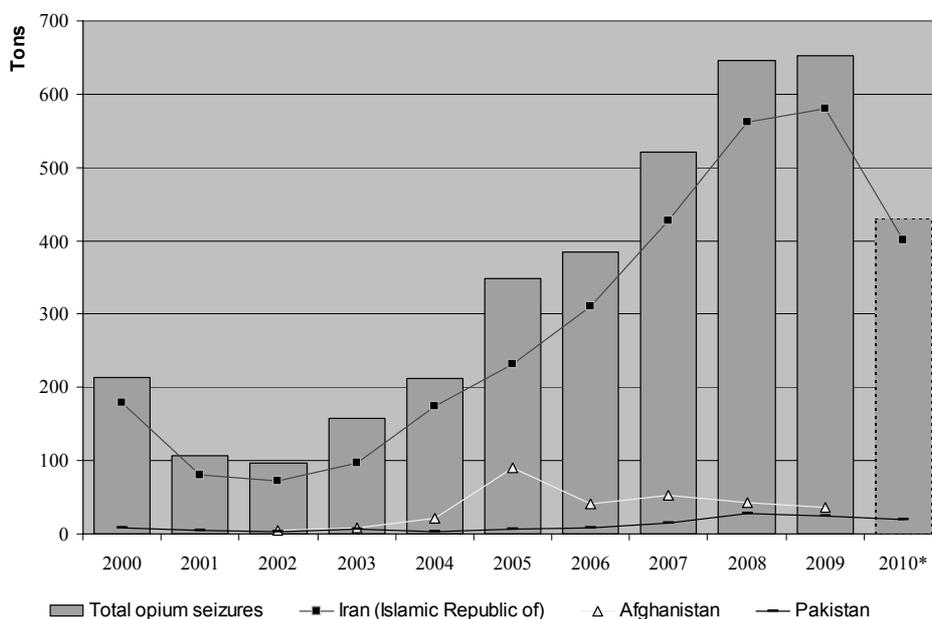
24. The European market for cannabis resin continued to be supplied mainly by production in Morocco. In 2009 and 2010 the majority of reporting countries in West and Central Europe continued to identify Morocco as a country of origin for cannabis resin. Notably, the highest annual total reported by a single country worldwide in 2010 was Spain who assessed that 90 per cent of seized cannabis resin originated in Morocco.

B. Opiates

1. Opium

25. Global seizures of opium grew at a marked sustained pace over the period 2002-2008 and stabilized in 2009 at 653 tons. In 2010, following a significant decline in opium production in Afghanistan, opium seizures appeared to decline significantly (based on incomplete data). Since 2004 the three countries of Afghanistan, Iran (Islamic Republic of) and Pakistan have consistently accounted for more than 90 per cent of global opium seizures. See figure III.

Figure III
Global opium seizures, 2000-2010
 (Tons)



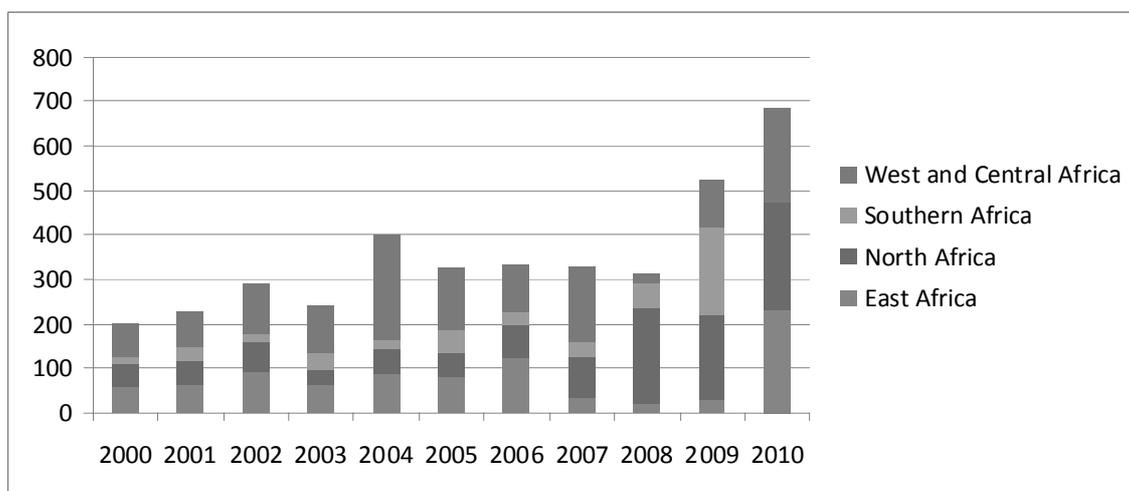
* For 2010, no data were available for Afghanistan. Total for 2010 based on incomplete data and subject to revision.

26. Based on UNODC's records, the Islamic Republic of Iran has always (starting in 1980) registered the highest annual total of opium seized by a single country worldwide. Over the period 2002-2009 in particular, seizures increased almost eight-fold, climbing from 73 tons to 580 tons. In 2010 seizures the trend was reversed, with seizures falling to 401 tons.

3. Heroin

27. Global seizures of heroin increased significantly over the period 2006-2009, reaching 76 tons. Incomplete data indicate that the global total stabilized in 2010. Large quantities of heroin continued to be smuggled on the established route, often referred to as the Balkan route, from Afghanistan to West and Central Europe via the Middle East and South-East Europe. In terms of heroin seizure totals, the most prominent countries worldwide continued to be the Islamic Republic of Iran and Turkey, two important transit countries on the Balkan route. Over the period 2004-2009 heroin seizure totals in these two countries appeared to be very closely related, but 2010 saw a marked departure from the trend, with seizures in the Islamic Republic of Iran continuing to increase, in contrast with the decrease registered in Turkey. However, significant quantities of heroin were also seized closer to the consumer markets for heroin, notably China, and may have been trafficked to Nigeria and Southern Africa.

Figure IV
Heroin seizures in Africa, 2000-2010
 (Tons)

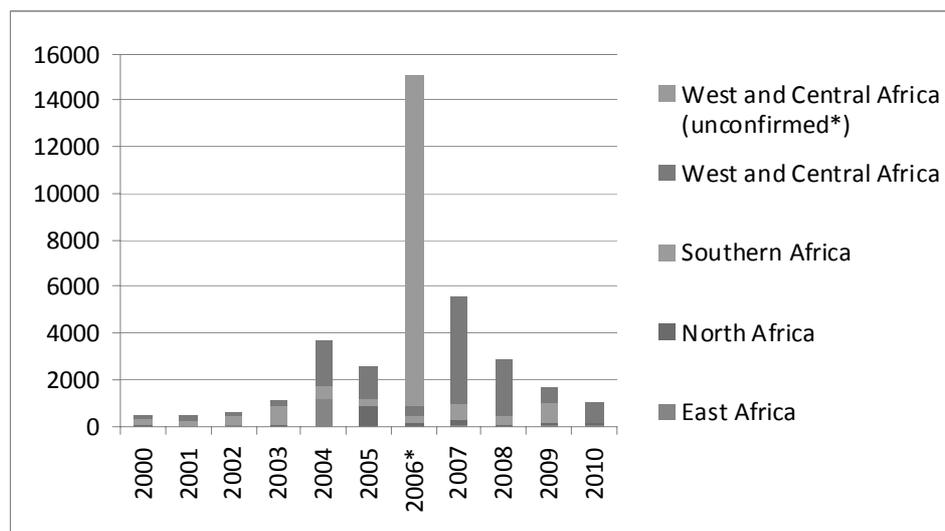


C. Cocaine

28. The world's main consumer markets for cocaine, namely North America and West and Central Europe, continue to be supplied by trafficking routes originating in South America, notably the Andean region. Cocaine is mainly trafficked northwards to North America, and across the Atlantic to Europe, directly, via the Caribbean or via Africa.

29. Global cocaine seizures have remained stable for several years, ranging between 690 tons and 731 tons over the period 2006-2009. At the time of preparation of the present report, incomplete data suggest a continued stable trend in 2010 or possibly a slight decrease, with the partial total standing at 653 tons, compared with 731 tons in 2009. However, while cocaine seizures appeared stable in the Americas and in West and Central Europe, several regions where cocaine trafficking has so far been limited showed a clear upward trend. In 2010, several countries not previously associated with trafficking or consumption of cocaine on a large scale registered moderate but sharply increasing (in comparison with 2009) cocaine seizures. These included Australia, China, Estonia, Latvia, Lithuania, Turkey, the Russian Federation, Pakistan and the Philippines.

Figure V
Trends in cocaine seizures in Africa, 2010 in comparison with 2009, by region



* The unconfirmed quantity refers to a single seizure, in which follow-up analysis failed to confirm the presence of controlled substances. This quantity is not included in the national, regional or global totals for 2006 as reported by UNODC.

30. West Africa is considered a secondary route for trafficking cocaine across the Atlantic to Europe. In 2010, Nigeria registered an increase in cocaine seizures from 392 kg in 2009 to 707 kg, the largest in Africa for that year.

31. In South America, Colombia continued to seize the largest quantities of cocaine by far, but seizures fell from 253 tons in 2009 to 211 tons in 2010. Colombia assessed that in 2010 56 per cent of seized cocaine salts were being trafficked by maritime routes, with 41 per cent being trafficked by land.

32. The United States remained a major consumer market for cocaine, and Mexico a key transit country for cocaine entering the United States.

33. Cocaine seizures in West and Central Europe peaked at 121 tons in 2006, and since then declined for three years in a row, amounting to 53 tons in 2009. Nevertheless, in 2010 cocaine seizures in West and Central Europe remained well below the peak level of 2006.

D. Amphetamine-type stimulants

1. Amphetamine

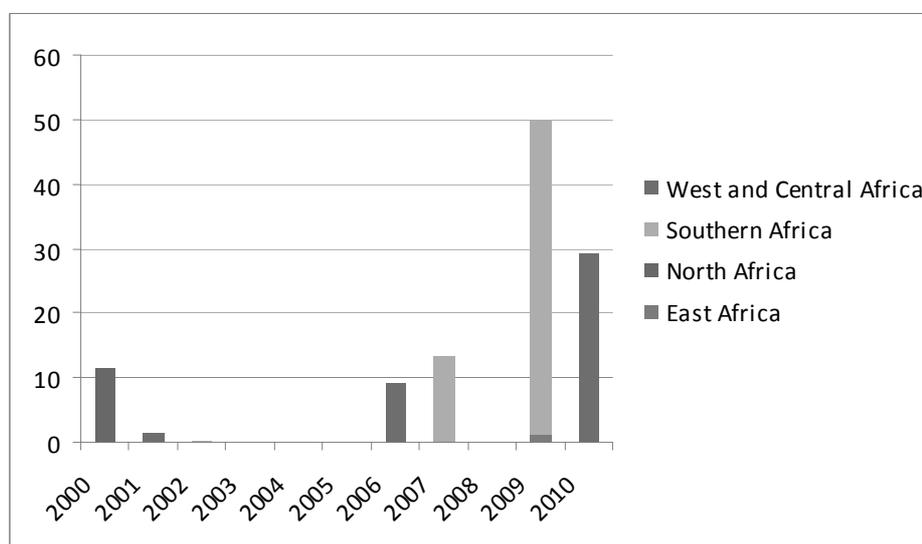
34. Global amphetamine seizures followed a generally increasing trend over the period 2000-2009, driven in part by increases in Captagon seizures registered in the Near and Middle East/South-West Asia, which overtook Europe, the other major market for amphetamine, in terms of total seizure quantities. See figure VI. Based on incomplete data, it appears that seizures in the Near and Middle East/South-West Asia may have receded in 2010. In particular, seizures in Saudi Arabia, a major

consumer market for Captagon tablets, fell from 12.4 tons in 2009 (the largest worldwide in that year) to 8.8 tons in 2010, while seizures in the Syrian Arab Republic fell from 22 million tablets in 2009 to 12 million tablets in 2010. Jordan registered seizures of 29 million tablets in 2009. For several years 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 points; however, it was unclear to what extent this supply may have been supplanted by other sources.

35. In West and Central Europe, amphetamine seizures rose significantly over the period 2000-2007, and maintained increased levels in 2008 (7.9 tons) and 2009 (7.4 tons), but incomplete data suggest a significant decrease in 2010, with seizures dropping by more than three quarters in the Netherlands and by almost one half in the United Kingdom.⁷

Figure VI

Breakdown of amphetamine seizures in Africa, 2000-2010



2. Methamphetamine

36. The global market for methamphetamine appeared to be expanding significantly. Methamphetamine remained widely available in several established markets and new patterns of methamphetamine manufacture, trafficking and consumption appeared to emerge involving countries and regions not previously associated with this phenomenon. Global seizures of methamphetamine rose from 22 tons in 2008 to 31 tons in 2009, and preliminary data suggested the total for 2010 would exceed 40 tons.

37. In Africa since 2008, due to an increase in methamphetamine seizures in countries in East Asia (primarily Japan and Republic of Korea), possible ATS

⁷ Estimate based on data for the financial year 2010/11, in comparison with the financial year 2009/10, which do not cover all jurisdictions in the United Kingdom. Comprehensive data for calendar years covering the entire United Kingdom were not available.

manufacture was reported in West Africa. In 2009, evidence of possible ATS manufacture was discovered in Guinea and in 2010, the United States Government indicted members of a large international cocaine trafficking organization, for, inter alia, the intent to establish an illicit laboratory in Liberia for large scale manufacturing of methamphetamine. In June 2011, a methamphetamine laboratory was discovered in Nigeria, on the outskirts of Lagos.
