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Arabic, English and Russian only*

**Subcommission on Illicit Drug Traffic and
Related Matters in the Near and Middle East****Forty-eighth session**

Vienna, 25-28 November 2013

Item 3 of the provisional agenda**

**Current situation with respect to regional and subregional
cooperation in countering drug trafficking****Statistics on drug trafficking trends in the Near and
Middle East, South, West and Central Asia****Note by the Secretariat***Summary*

The present report provides an overview of global trends in illicit drug production and trafficking, with a focus on member States of the Subcommission on Illicit Drug Traffic and Related Matters in the Near and Middle East. The statistics and analysis are based on the latest information available to the United Nations Office on Drugs and Crime. The report provides information on illicit drug cultivation and production for 2011 and 2012 and statistics on drug seizures for 2010, 2011 and 2012 where available.

Afghanistan continues to account for the majority of illicit opium poppy cultivation worldwide. Consequently, Subcommission member States accounted for the majority of global seizures of opium, illicit morphine and heroin. In 2011, ninety-nine per cent of global opium seizures and ninety-eight per cent of global illicit morphine seizures occurred in the region. Global seizures of heroin were spread across a wider range of countries. However, Subcommission member States still accounted for two thirds of global heroin seizures.

Cultivation of cannabis continues to be found, to varying extents, in most Subcommission member States which accounted for 5.2 per cent of global cannabis herb seizures in 2011 (a similar level to the previous year). The proportion of

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

** UNODC/SUBCOM/48/1.



cannabis resin seized in the Near and Middle East has been trending upwards since 2001.

Cultivation of cannabis continues to be found, to varying extents, in most Subcommission member States which accounted for 5.2 per cent of global cannabis herb seizures in 2011 (a similar level to the previous year). The proportion of cannabis resin seized in the Near and Middle East has been trending upwards since 2001.

In comparison with other drugs and other regions the availability of cocaine remained limited among Subcommission member States. Turkey was the only member State of the Subcommission to report seizing over 100 kg of cocaine in 2011.

Global amphetamine seizures followed a generally increasing trend over the period 2001-2009, driven in part by increases in seizures of amphetamine registered in Saudi Arabia, which is a major consumer market for Captagon tablets. Global amphetamine seizures decreased in 2010 but rebounded in 2011 to remain below the peak recorded in 2009. Seizures of Captagon in Saudi Arabia fell in 2012. Seizures of methamphetamine among Subcommission member States followed the global trend and increased dramatically over the past five years. Turkey continued to account for the majority of the seizures of “ecstasy”-type substances reported by Subcommission member States.

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I. Introduction

A. Purpose

1. The aim of this report is to provide information on the latest trends to assist national authorities in their efforts to combat illicit drug production and trafficking. The report contains recent information relating to the production and trafficking of the main illicit drugs at a global level, with a particular focus on the 23 member States of the Subcommittee on Illicit Drug Traffic and Related Matters in the Near and Middle East.¹
2. The analysis in this report is based on the latest information available to the United Nations Office on Drugs and Crime (UNODC). The second section of the report covers the cultivation of illicit drug crops and the production of plant-based drugs. Section three presents statistics on seizures of cannabis, opiates, cocaine, and amphetamine-type stimulants with a specific focus on seizures by member States of the Subcommittee. The fourth section highlights activities undertaken by Subcommittee member States to reduce the supply of illicit drugs and covers domestic activities, cross-border cooperation and international technical cooperation activities undertaken during 2010 and 2011.
3. National authorities are able to draw on the information, along with other relevant sources, to improve the coordination of actions at subregional and regional levels.

B. Sources of information

4. UNODC publishes illicit crop-monitoring surveys on the cultivation and production of plant-based drugs. These surveys include the Afghanistan opium survey, the South-East Asia opium survey and coca cultivation surveys in Colombia, Peru and Bolivia. The second section of this report titled “trends in illicit drug crop cultivation and the production of plant-based drugs” draws on the latest available published information from these surveys.
5. Part IV of the Annual Reports Questionnaire, submitted to UNODC by Governments for 2012, 2011 and previous years, are the primary source of seizure statistics. Responses from Subcommittee member States to the 2012 questionnaire have been included in the analysis where available. Ninety-seven member States and territories, including 15 member States² of the Subcommittee, responded to the 2011 Annual Reports Questionnaires. At the time of writing,³ UNODC had

¹ Member States of the Subcommittee include: Afghanistan, Azerbaijan, Bahrain, Egypt, India, Iran (Islamic Republic of), Iraq, Jordan, Kazakhstan, Kuwait, Kyrgyzstan, Lebanon, Oman, Pakistan, Qatar, Saudi Arabia, Syrian Arab Republic, Tajikistan, Turkey, Turkmenistan, United Arab Emirates, Uzbekistan and Yemen.

² Azerbaijan, Egypt, India, Jordan, Kazakhstan, Kyrgyzstan, Lebanon, Pakistan, Qatar, Saudi Arabia, Tajikistan, Turkey, Turkmenistan, Uzbekistan and Yemen.

³ September 2013

received eight responses from member States of the Subcommittee⁴ to the 2012 survey.

6. Countries reports from the 2012 regional meetings of the Heads of National Drug Law Enforcement Agencies and countries reports from the previous meeting of the Subcommittee⁵ are an important source of recent information. In addition to the statistics on seizures of illicit drugs, these reports often contain examples of law enforcement activities and provide insights into new and emerging trends.

7. Member States responses to questions on supply reduction in part II (comprehensive approach to drug demand reduction and supply) of the Annual Reports Questionnaire from 2010 and 2011 is the basis on the analysis contained in the final section of this report.

C. Data limitations

8. Statistics on drug seizures offer valid, indirect indicators of trafficking trends. However, these statistics should be treated with caution, as they reflect different reporting practices and depend on the level and effectiveness of law enforcement capacities.

II. Trends in illicit drug crop cultivation and the production of plant-based drugs

A. Cannabis

9. Unlike other illicit crops such as coca leaf and opium poppy, cannabis grows in varied environments and lends itself to diverse cultivation methods. This 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. The country reports provided in 2012 and responses to the Annual Reports Questionnaire show that cannabis cultivation continues, to varying extents, in most Subcommittee member States.

10. The 2012 Afghanistan survey of survey of commercial cannabis cultivation and production, estimated the area under commercial cannabis cultivation to be 10,000 hectares (down 17 per cent from 2011). However, the area covered by the survey was reduced compared to 2011, which reduces the comparability of the two area estimates. The decrease in cultivation is mainly attributed to lower levels of cannabis cultivation in Uruzgan province. The area under cannabis cultivation in Uruzgan decreased drastically from more than 1,000 hectares in 2011 to less than 100 hectares in 2012. Potential production of cannabis resin was estimated to be

⁴ Azerbaijan, Egypt, Kazakhstan, Saudi Arabia, Tajikistan, Turkey, Turkmenistan and Yemen.

⁵ 47th Subcommittee on Illicit Drug Traffic and Related Matters in the Near and Middle East. Antalya, Turkey, 19-23 November 2012.

1,400 tons. Due to higher per-hectare yields, production increased by 8 per cent compared to 2011.⁶

11. 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.

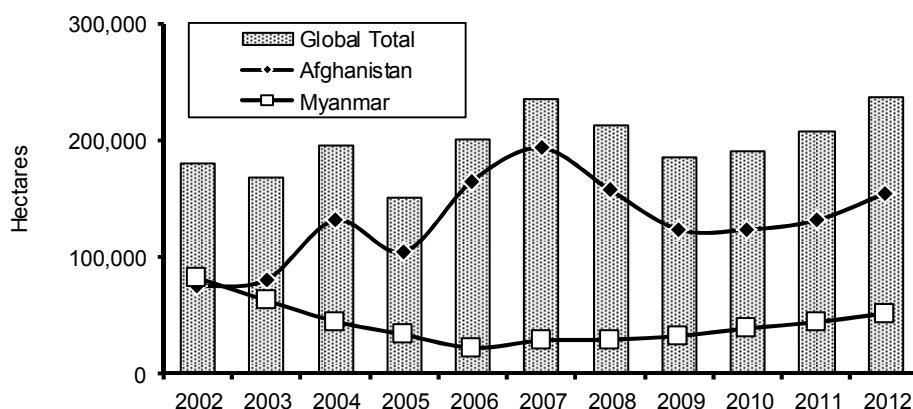
B. Opium

12. Afghanistan and Myanmar continued to account for the majority of illicit opium poppy cultivation worldwide, with 84 per cent of global opium cultivation having occurred in those two countries. Figure I shows that the total area under opium poppy cultivation worldwide increased by 15 per cent in 2012 to reach 236,320 hectares.⁷

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, 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 increase in the area eradicated through Government efforts, which resulted in eradicated 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.

⁶ Afghanistan Survey of Commercial Cannabis Cultivation and Production 2012, key findings, p. 6.

⁷ United Nations Office on Drugs and Crime, *World Drug Report 2013*.

14. 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 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.

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 is still 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.

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, 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.⁸ In Colombia, a total of 341 hectares under opium poppy cultivation was detected in 2011 and 304 hectares of opium poppy was eradicated.

17. In Egypt, illicit opium poppy cultivation is confined to the Sinai Peninsula and is on a limited scale. Egypt eradicated 222 ha of illicitly cultivated opium poppy in 2010 and eradicated a much smaller amount in 2011 (0.5 hectares). Authorities reported that despite the existence of some poppy cultivation there were no registered cases of local heroin production.⁹ The only other country in Africa reporting the cultivation of opium poppy was Algeria, which reported the eradication of 868 poppy plants in 2010 and 340 plants in 2011.

18. In India, the use of satellite imagery, ground verification and the collection of intelligence contributed to an 88 per cent increase in the eradication of illicit opium poppy. Authorities reported the eradication of 5,746 hectares of opium poppy during 2011. Cultivation of opium poppy also occurred in Pakistan. In the 2011 Annual Reports Questionnaire, Pakistan reported the eradication of 1,053 hectares of opium poppy. After eradication, the total area under cultivation reduced to 362 hectares.

⁸ 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 in Antigua, Guatemala, from 1 to 5 October 2012.

⁹ Country report of Egypt, Twenty-second Meeting of Heads of National Drug Law Enforcement Agencies, Africa. Accra, 25-29 June 2012.

C. Coca

19. 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). 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.

20. Survey data suggests that the total area under coca bush cultivation worldwide decreased in 2012. At the time of writing,¹⁰ UNODC had recently published the 2012 coca monitoring surveys for Colombia and the Plurinational State of Bolivia. Both surveys show a decrease in the area under coca bush cultivation.

21. The results of the latest Colombia coca cultivation survey show that at 31 December 2012, Colombia had 48,000 hectares under coca cultivation, distributed across 23 of the 32 departments in the country. This represents a 25 per cent reduction of the area under cultivation since 2011. The number of departments affected remained stable at 23 and only 3 departments showed an increase in the area under coca cultivation. The majority of departments recorded a decrease in the area under coca cultivation.¹¹

22. The 2012 national coca monitoring survey in the Plurinational State of Bolivia showed that the area under coca bush cultivation decreased by around 7 per cent. In 2012, the area under cultivation stood at around 25,300 hectares, down from the previous year's figure of 27,200 hectares. This decline is a continuation of the downward trend recorded in 2011, when cultivation fell by 12 per cent.¹²

23. 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 each year between 2005 and 2011, but remains far below the levels registered prior to 1996. Eradication efforts by authorities contained the trend of an increasing total area under cultivation.¹³

III. Trends in illicit drug trafficking

24. Subcommittee member States accounted for the majority of global opium, heroin and illicit morphine seizures. In 2011, ninety-nine per cent of global opium seizures and ninety-eight per cent of global illicit morphine seizures occurred in these countries. Global seizures of heroin were spread across a wider range of countries. However, Subcommittee member States still accounted for two thirds of global heroin seizures in 2011. Table I shows the reported quantities of seizures for the major drug groups in 2010 and 2011 both globally and by Subcommittee member States.

¹⁰ September 2013.

¹¹ Colombia coca cultivation survey, 2012.

¹² Plurinational State of Bolivia coca cultivation survey, 2012.

¹³ Peru coca cultivation survey, 2011.

Table 1
Drug seizures by Subcommittee member States, 2010 and 2011

Drug	2010			2011		
	Subcommission member States (Kilograms)	Global total (Kilograms)	(Percentage)	Subcommission member States (Kilograms)	Global total (Kilograms)	(Percentage)
Cannabis herb	365,472	6,664,676	5.5%	298,435	5,762,920	5.2%
Cannabis resin	448,990	1,129,091	39.8%	372,530	1,051,059	35.4%
Cocaine ¹⁴	822	608,857	0.1%	723	595,318	0.1%
Opium	485,633	492,439	98.6%	483,129	491,372	98.3%
Illicit morphine	19,241	19,303	99.7%	61,999	62,357	99.4%
Heroin	57,000	80,986	70.4%	51,079	75,997	67.2%
Amphetamine	13,860	19,581	70.8%	19,951	30,973	64.4%
Methamphetamine	1,521	50,880	3.0%	4,764	87,996	5.4%
“Ecstasy”	253	3,792	6.7%	381	3,673	10.4%

A. Cannabis

Cannabis herb — Global trends

25. Due to the relative ease with which growers can produce cannabis herb, demand tends to be met by local production. This leads to a more localized pattern of trafficking when compared with other plant-based illicit drugs. In 2011, the production and consumption of cannabis herb occurred in most countries worldwide. Between 2006 and 2011, the level of global seizures ranged from 5,525 to 6,664 tons per year. Seizures decreased from 6,665 tons in 2010 to 5,763 tons in 2011.

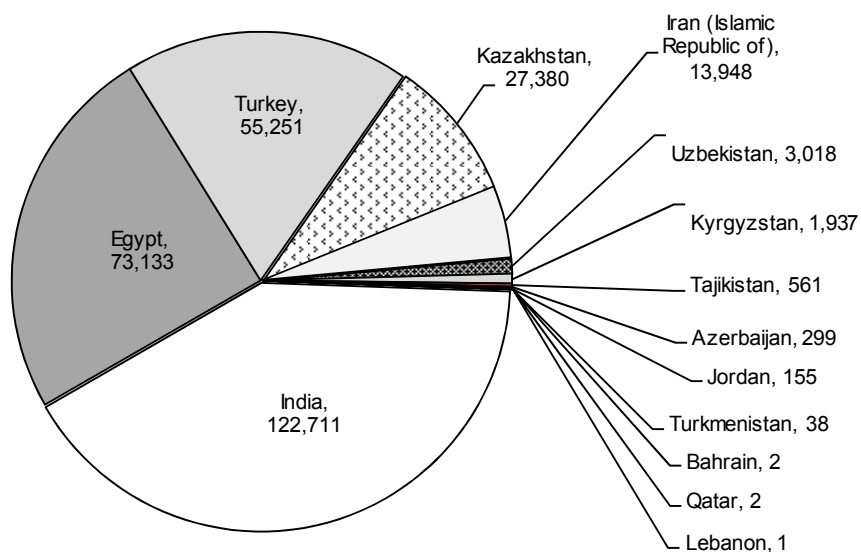
26. In 2011, the largest proportion of global cannabis herb seizures continued to occur in North America. Broken down by region, cannabis herb seizures in North America accounted 69 per cent of annual global seizures, seizures in Latin America and the Caribbean accounted for 14 per cent, Africa accounted 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 — Subcommittee member States

27. In 2011, Subcommittee member States accounted for 5.2 per cent of global cannabis herb seizures. A similar level to the 5.5 per cent reported in 2010. Figure II shows the distribution of cannabis herb seizures among Subcommittee member States. For the majority of countries, cannabis herb seizures in 2011 were of a similar magnitude to the previous year.

¹⁴ Includes coca paste/coca base, cocaine base, cocaine salts and crack.

Figure II
Cannabis herb seizures in 2011, Subcommittee member States
 (Kilograms)



28. During 2011, India seized the largest amount of cannabis herb by a Subcommittee member State. However, seizures in the country fell from 173 tons in 2010 to 123 tons in 2011. In the 2011 Annual Reports Questionnaire, India reported that 13 per cent of the cannabis herb seized originated from Nepal. The remaining 87 per cent was either locally produced or from an unknown source country.

29. In Egypt, authorities reported¹⁵ cannabis is planted all year round, mostly in rugged areas of Sinai and in the Nile islands in Upper Egypt. In spite of efforts by the police, armed forces and the air force, cannabis cultivation continued to persist in Egypt. Authorities noted that the high cost of cannabis eradication operations was a challenge and drew attention to the level human, material and technical resources involved. A further 77,000 kilograms of cannabis herb was seized in the country during 2012.

30. The increase in Cannabis herb seizures in Southeast Europe during recent years can be attributed to Turkey. The trend continued in 2012 when seizures in Turkey more than doubled from the previous year to reach 125 tons. Authorities in Turkey¹⁶ 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 and arrests has also increased. Like many other countries, a large

¹⁵ Country report of Egypt, Forty-seventh session of the Subcommittee on Illicit Drug Trafficking and Related Matters in the Near and Middle East. Antalya, Turkey, 19-23 November 2012.

¹⁶ Country Report of Turkey, Forty-seventh session of the Subcommittee on Illicit Drug Trafficking and Related Matters in the Near and Middle East. Antalya, Turkey, 19-23 November 2012.

proportion of the cannabis seized by authorities in Turkey is produced locally. However, officials noted that cannabis is also supplied from Iran and Syria.

Cannabis resin — Global trends

31. 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. In 2011, twenty-eight countries seized over 1 ton of cannabis resin, thirteen of these countries were in Europe.

32. 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 plays an important role in preventing cannabis resin from reaching other European countries due to the countries proximity to Morocco, a known source country for cannabis resin.

33. Spanish authorities reported¹⁷ 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 2010 and 37 per cent higher than in 2002.

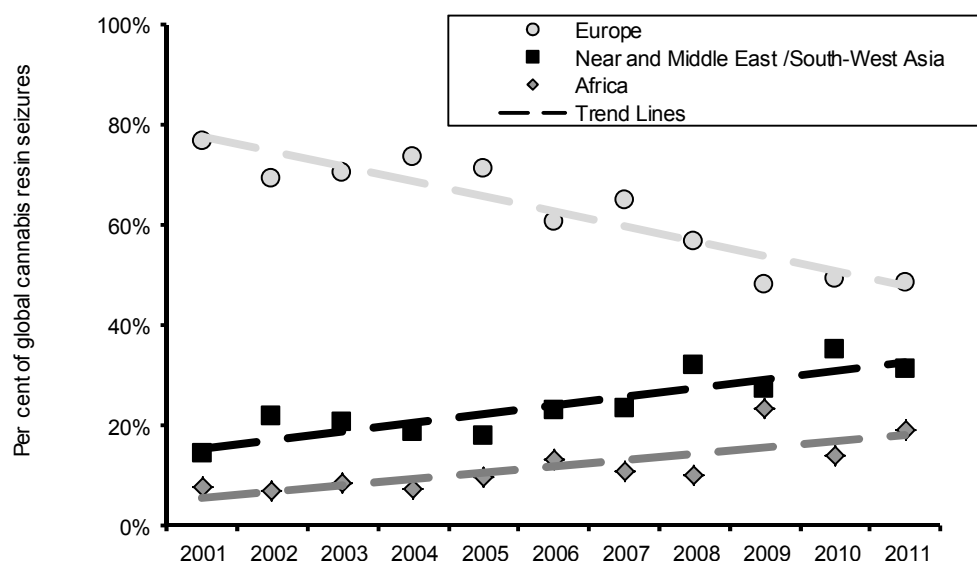
34. Data from the 2011 Annual Reports Questionnaires indicates that Morocco is likely to have produced the majority of cannabis resin seized in Europe. However, several European countries also listed Afghanistan and Pakistan as source countries for the drug.

Cannabis resin — Subcommittee member States

35. Since 2001, the proportion of cannabis resin seized in the Near and Middle East has been trending upwards, while the proportion of global cannabis resin seizures occurring in Europe has been trending down (see figure III). 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 cannabis resin originating from Afghanistan and Pakistan is becoming more prominent within the global market.

¹⁷ 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.

Figure III
Cannabis resin seizures in selected regions, 2001-2011
 (Per cent of global seizures)



36. In addition to Afghanistan and Morocco, several other countries were listed as source countries for cannabis resin in the Annual Reports Questionnaires. These countries include India, Pakistan and Lebanon. Such data must be treated carefully as they do not distinguish between transit countries and countries of origin.¹⁸

37. According to authorities in Pakistan,¹⁹ Pakistan continues to be a major transit route for cannabis resin produced in Afghanistan. In 2012, authorities noted that there has been an increase in the flow of drugs into and through Pakistan. This increase is reflected in the seizure statistics for the country, which show that both the number of seizure cases and the amount of cannabis resin seized in 2011 is significantly higher than in 2007 (see figure IV).

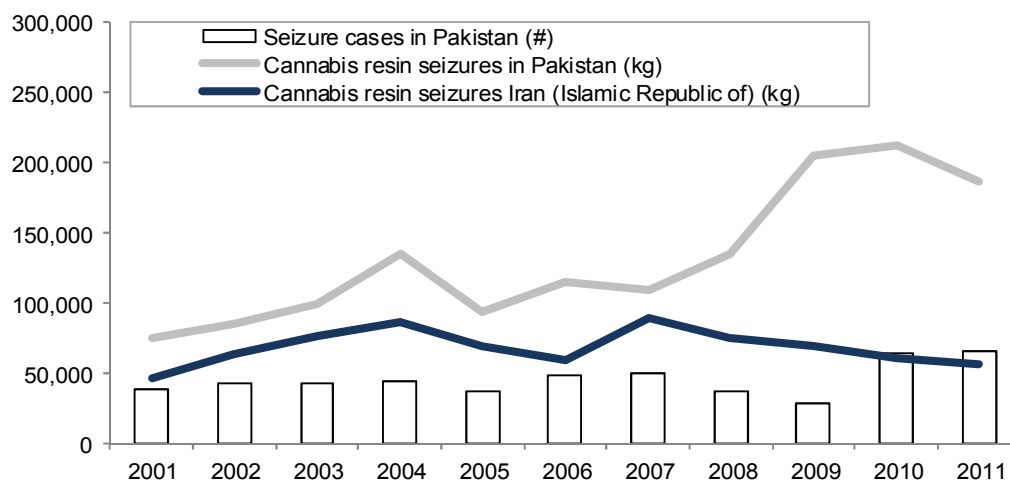
38. Seizures of cannabis resin in Iran (Islamic Republic of) have decreased from 89,700 kilograms in 2007 to 57,100 kilograms in 2011. The decrease in seizures of cannabis resin in Iran and corresponding increase in Pakistan may indicate a shift in the routes used by drug traffickers.

39. Seizures of hashish in India decreased from 4.3 tons in 2010 to 3.9 tons in 2011. In the 2011 Annual Reports Questionnaire, India reported that Nepal was the source country for 42 per cent of the cannabis resin seized in India. Seizures in Nepal amounted to 1.9 tons in 2011, approximately half the size of seizures in India.

¹⁸ *World drug report 2013*.

¹⁹ Country report of Pakistan, Forty-seventh session of the Subcommittee on Illicit Drug Trafficking and Related Matters in the Near and Middle East. Antalya, Turkey, 19-23 November 2012.

Figure IV

Cannabis resin seizures in Pakistan and Iran (Islamic Republic of), 2001-2011**B. Opiates**

40. The estimated annual prevalence of opiate use is between 0.28 and 0.44 per cent of the adult population;²⁰ the majority of these people are heroin users. As a result, heroin trafficking is of great concern. Seizures of opium and morphine continue to occur within the Near and Middle East/South-West Asia, whereas seizures of heroin follow a much wider geographical distribution.

Opium

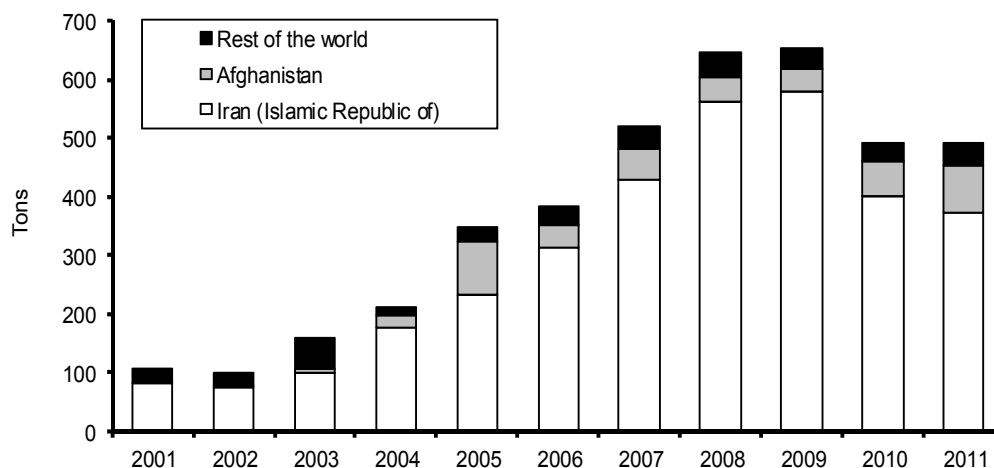
41. Global seizures of opium grew at a marked pace over the period 2002-2008 and stabilized in 2009 at 653 tons. Global opium seizures declined to 492 tons in 2010 and remained at a similar level in 2011 (491 tons). Since 2004, three countries — Afghanistan, Iran (Islamic Republic of) and Pakistan — 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 2011.²¹ In 2011, opium seizures in Afghanistan increased for the second consecutive year to 80 tons, the highest level since 2005. While in Pakistan, seizures increased from 19 tons in 2010 to 23 tons in 2011.

²⁰ *World drug report 2013*.

²¹ Information provided by the Iranian National Drug Control Headquarters.

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



43. In addition to Afghanistan, Iran and Pakistan, the only other Subcommission member State with annual opium seizures of over 1 tons was India. Seizures of opium in India amounted to 2.3 tons in 2011, a 26 per cent increase from the previous year. Between January and September 2012, India seized 1.6 tons of opium,²² which indicates seizures in the country for the 2012 calendar year were stable.

Illicit Morphine

44. As is the case with opium, seizures of morphine continued to be concentrated in Afghanistan and neighbouring countries. Between 2005 and 2011, Afghanistan, Iran (Islamic Republic of) and Pakistan have accounted for over 90 per cent of illicit morphine seizures worldwide. Morphine seizures in the Near and 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.

²² Country report of India, Thirty-sixth Meeting of the Heads of National Drug Enforcement Agencies, Asia and the Pacific. Bangkok, 30 October-2 November 2012.

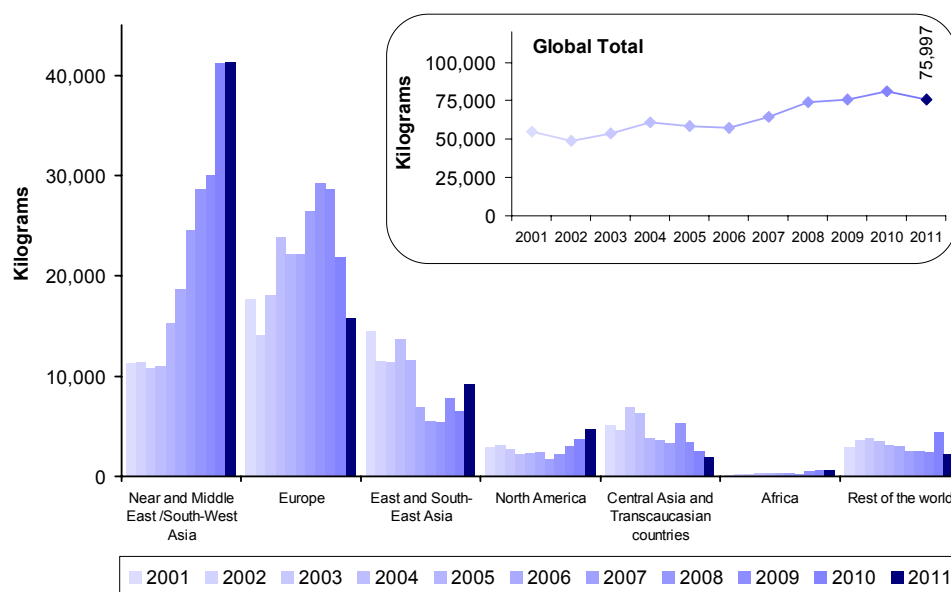
Heroin — Global trends

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.

46. Heroin seizures in Europe decreased in 2011 for the third consecutive year. However, while heroin seizures have been reducing in Europe in recent years, seizures have been increasing in North America. The United States of America, 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 south-west border of the United States have increased steadily since 2007.

Figure VI

Global heroin seizures, 2001-2011 (Kilograms)



Heroin — Subcommission countries

47. 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. The increasing trend ended in 2011, with seizures in the country falling 15 per cent, to 23 tons.²³

²³ Information provided by the Iranian National Drug Control Headquarters.

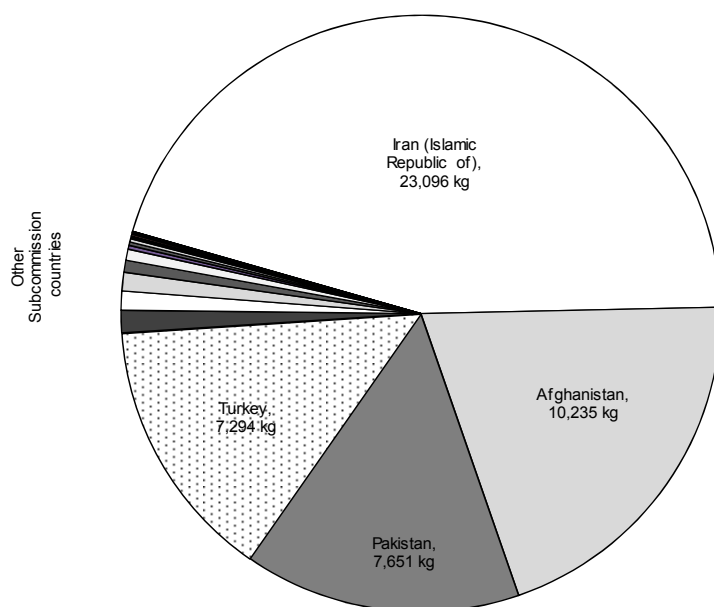
48. In Pakistan, seizures of heroin doubled between 2009 and 2010, reaching 4.2 tons. Heroin seizures continued to increase in 2011, with seizures reaching 7.6 tons, the highest level in that country since 2000.

49. In 2012, seizures of heroin in Turkey increased to 13 tons after decreasing for the previous two years. Law enforcement authorities in the countries noted an increase in the smuggling of heroin by sea and reported the increased use of sea cargo to conceal and transport opiates.

50. Annual heroin seizures in India decreased in each of the five years leading up to 2011. Seizures of heroin in India dropped to 527 kilograms in 2011, which represented the lowest level in the country since 1984. However, the trend ended in 2012. During the 9 months from January 2012 to September 2012, India seized 668 kilograms of heroin.²⁴

Figure VII

Heroin seizures by Subcommittee member States (2011)



²⁴ Country report of India, Thirty-sixth Meeting of the Heads of National Drug Enforcement Agencies, Asia and the Pacific. Bangkok, 30 October-2 November 2012.

C. Cocaine

Cocaine — Global trends

51. 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 VIII shows the trend in selected regions and subregions between 2001 and 2011.

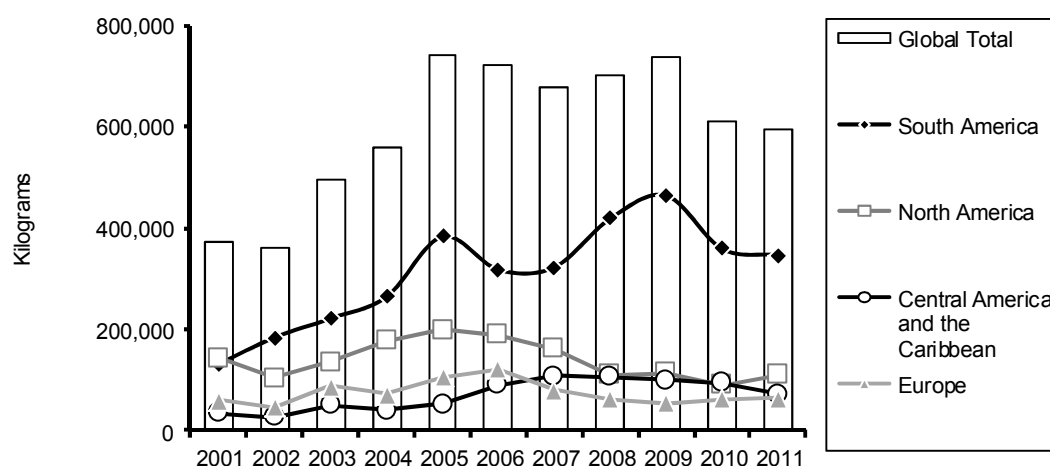
52. Among South American countries, Colombia continued to seize the largest quantities of cocaine. Seizures in that country fell from 165 tons in 2010 to 146 tons in 2011. Seizures in Colombia rebounded to 188 tons in 2012. Colombian authorities reported that, in terms of quantity of cocaine seized, the most successful seizure operations were maritime operations.²⁵ Authorities in Honduras reported seizing 16,800 kg of cocaine in 2011, by far the largest annual amount seized by that country.

53. 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.

54. Cocaine continues to be trafficked to the 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.

²⁵ Country report of Colombia, Twenty-second Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean. Antigua, Guatemala, 1-5 October 2012.

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



Cocaine — Subcommittee member States

55. In most Subcommittee member States, the availability of cocaine remained limited in comparison with other drugs and other regions. However, seizure data shows that cocaine is trafficked into the region. Turkey was the only Subcommittee member State that reported seizing over 100 kg of cocaine in 2011. Seizures in Turkey reached 592 kilograms in 2011, which represents the highest level reported by the country since 1998. In 2012, cocaine seizures decreased slightly to 476 kilograms but remained well above the levels recorded between 2001 and 2010.

56. Authorities from Turkey reported²⁶ that the country is both a final destination and transit country for cocaine. In previous years, the primary mode of trafficking into Turkey was via air couriers. However, recently larger volumes of cocaine have been detected and seized from sea containers and maritime vessels. Authorities also noted that some organized criminal groups which are involved in heroin trafficking had also become involved in cocaine trafficking.

D. Amphetamine-type stimulants

Amphetamine

57. 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

²⁶ Country report of Turkey, Forty-seventh session of the Subcommittee on Illicit Drug Trafficking and Related Matters in the Near and Middle East. Antalya, Turkey, 19-23 November 2012.

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.

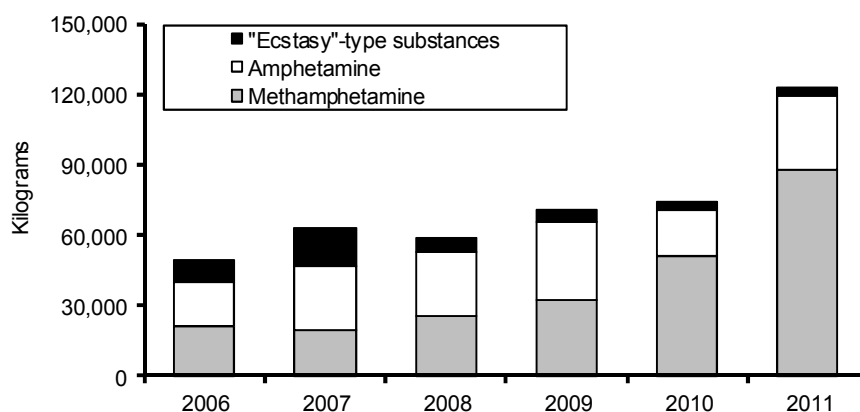
58. Saudi Arabia is a major consumer market for Captagon tablets. Seizures in Saudi Arabia rose from 8.8 tons in 2010 (52 million tablets) to 11.5 tons (67 million tablets). However, in 2012 seizures fell to 48 million tablets. In the Syrian Arab Republic, seizures rose from 2.1 tons (12 million tablets) 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

59. 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. Seizures among Subcommittee member States followed the global trend, increasing dramatically over the past five years from 38 kilograms in 2007 to 4,765 kilograms in 2011 (see Table II).

Figure IX

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



60. Seizures of methamphetamine in Mexico have risen sharply in recent years. In 2011, Mexico seized over 30 tons (30,740 kg) of methamphetamine, 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).

Table 2
ATS seizures by Subcommittee member States, 2007-2011

	2007 (Kilograms)	2008 (Kilograms)	2009 (Kilograms)	2010 (Kilograms)	2011 (Kilograms)
Amphetamine	18,331	18,130	25,005	13,860	19,951
“Ecstasy”	304	282	124	253	381
Methamphetamine	38	1,473	866	1,521	4,765

61. In 2011, seizures of methamphetamine among Subcommittee member States remained concentrated in a small number of countries. One of which was Iran (Islamic Republic of), where seizure rose to nearly 4 tons in 2011. India also reported an increase in 2011, with seizures of 469 kilograms of methamphetamine (up from 22 kilograms in 2010). Law enforcement agencies in India dismantled two clandestine laboratories in 2011, one producing methamphetamine and the other producing ephedrine. Turkey seized over half a ton (502 kilograms) of methamphetamine in 2012, up from 370 kilograms the previous year. Methamphetamine seizures in Turkey have now increased for three consecutive years.

“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.

63. 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 United Kingdom of Great Britain and Northern Ireland).

64. Each year between 2001 and 2011, Turkey has accounted for the over 90 per cent of the seizures of “ecstasy”-type substances among the 23 Subcommittee member States. This trend appears to have continued during 2012 with Turkey seizing 502 kilograms of “ecstasy”-type substances. Authorities reported²⁷ that Turkey is a final market for “ecstasy” trafficked from Europe via air, sea and land routes.

²⁷ Country report of Turkey, Forty-seventh session of the Subcommittee on Illicit Drug Trafficking and Related Matters in the Near and Middle East. Antalya, Turkey, 19-23 November 2012.

IV. Supply reduction activities by Subcommittee member States

Analysis of ARQ Part II

65. This section provides a brief summary of the responses from Subcommittee member States to a portion of Part II of the Annual Reports Questionnaire. The title of Part II of the questionnaire is “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.

66. UNODC first used the current version of survey questions 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, fifty-six countries had completed the 2012 survey. Consequently, only responses to the 2010 and 2011 survey are included in the analysis.

67. The majority of the analysis uses the combined responses to the 2010 and 2011 survey, rather than a comparison between 2010 and 2011. In 2010, seventeen of the twenty-three Subcommittee member States completed part II of the Annual Reports Questionnaire. Fifteen Subcommittee member States responded in 2011 and thirteen countries completed the survey in both 2010 and 2011. For those countries that provided a response in both 2010 and 2011, the latest response is used.

Domestic activities

68. 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, all responding countries in the region reported that a strategy was in place. Six countries in the region did not answer this question.

69. The survey asked member States about activities undertaken to reduce the supply of illicit drugs. During 2010 and 2011, 92 per cent of responding countries in the region reported the monitoring of amphetamine-type stimulants and illicit substances, 87 per cent reported undertaking programmes for the eradication of illicit drug crops, 85 per cent reported undertaking research and evaluation activities, and 77 per cent reported the use of forensic intelligence. Seventy-three per cent of responding countries reported that alternative development activities took place. All Subcommittee member States who responded to the survey reported engaging in activities to control or monitor precursor chemicals.

70. In all responding countries, the police, customs or a specialized agency had a mandate to reduce drug supply. Compared with other regions, the Near and Middle East has a higher proportion of countries where the military has a mandate to reduce drug supply.

71. Law enforcement throughout the region utilize a full range of techniques to reduce the supply of illicit drugs. All responding countries in the region reported using informants as an investigative technique to gather evidence. In addition,

controlled delivery and electronic surveillance were common investigative techniques that all responding countries had used in either 2010 or 2011. Ninety-three per cent of responding countries reported using undercover techniques during the survey period.

72. Sixty-four 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

73. The data suggests that most countries in the region are involved in joint law enforcement activities with neighbouring countries. All responding member States reported exchanging information with law enforcement in different countries and ninety-three per cent of countries reported engaging in joint operations. The practice of exchanging liaison officers is common in the region with all responding countries reporting exchanging liaison officers. Some of the countries who undertook joint operations provided examples of joint operations that resulted in the disruption of criminal organizations, the arrest of drug traffickers and the seizure of illicit substances.

74. Sixty-three per cent of countries from the region identified slow formal procedures as a problem in cooperating with counterparts in other countries. Just under half (44 per cent) of the responding countries reported that lack of cooperation from counterparts was problems and the same percentage of countries identified the lack of agreements enabling operational cooperation/mutual legal assistance. Thirty-eight per cent of countries indicated that lack of a common language was a challenge. Most countries indicated they could establish quick communication with counterparts in other countries. Only one country (11 per cent) indicated judicial or law enforcement agencies had problems quickly identifying counterparts in other countries to establish communication.

International technical cooperation

75. Fifty-eight per cent of responding Subcommittee member States 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 and equipment, 80 per cent received data sharing assistance, 66 per cent received software and 50 per cent received financial assistance. Only 17 per cent of the responding countries reported the assistance was sufficient for their needs.

76. Three Subcommittee member States reported providing assistance, mainly in the form of training, to other countries in the region.

V. Conclusions

77. Afghanistan continued to account for the majority of illicit opium poppy cultivation worldwide. Consequently, Subcommittee member States accounted for the majority of global seizures of opium, illicit morphine and heroin. In 2011, ninety-nine per cent of global opium seizures and ninety-eight per cent of global

illicit morphine seizures occurred in the region. Global seizures of heroin were spread across a wider range of countries. However, Subcommission member States still accounted for two-thirds of global heroin seizures.

78. Cultivation of cannabis continues to be found, to varying extents, in most Subcommission member States which accounted for 5.2 per cent of global cannabis herb seizures in 2011 (a similar level to the previous year). The proportion of cannabis resin seized in the Near and Middle East has been trending upwards since 2001. Data from the Annual Reports Questionnaires shows that 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 cannabis resin originating from Afghanistan and Pakistan is becoming more prominent within the global market.

79. In comparison with other drugs and other regions, the availability of cocaine remained limited among Subcommission member States. Turkey was the only member of the Subcommission to report seizing over 100 kg of cocaine in 2011.

80. Global amphetamine seizures followed a generally increasing trend over the period 2001-2009, driven in part by increases in seizures of amphetamine registered in Saudi Arabia, which is a major consumer market for Captagon tablets. Global amphetamine seizures decreased in 2010 but rebounded in 2011 to remain below the peak recorded in 2009. Seizures of Captagon in Saudi Arabia fell in 2012. Seizures of methamphetamine among Subcommission member States followed the global trend and increased dramatically over the past five years. Turkey continued to account for the majority of the seizures of “ecstasy”-type substances reported by Subcommission member States.
