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World situation with regard to drug trafficking and recommendations of the subsidiary bodies of the Commission

World situation with regard to drug trafficking

Report of the Secretariat**

Summary

The present report provides an overview of the latest trends in illicit drug production and trafficking worldwide. The statistics and analysis in the report are based on the latest information available to the United Nations Office on Drugs and Crime. In respect of seizure statistics, the report focuses on 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 mostly widely produced, trafficked and used plant-based drug worldwide. While cannabis herb production was found, to some extent, in most countries, production of cannabis resin was concentrated in just a few countries, among which Afghanistan and Morocco were the most prominent examples. Global seizures of cannabis herb continued to be dominated by the quantities seized in the Americas. Large quantities of cannabis resin were smuggled out of Morocco into Europe, as well as out of Afghanistan into neighbouring countries and, to a lesser extent, other countries.

* E/CN.7/2012/1.

** The present report was submitted late owing to a delay in the availability of data submitted by Member States via the annual report questionnaire. Insufficient data were available at the given deadline to prepare a meaningful report.



In 2011, opium poppy cultivation in Afghanistan increased marginally, while the decline in opium production observed in 2010, caused by a disease affecting the opium poppy crop, was largely reversed. The drop in 2010 may have affected seizures of opiates, notably opium and morphine, both of which appeared to have declined in 2010. Sustained increases in opium prices in Afghanistan, however, could provide a strong incentive for farmers to favour the illicit cultivation of opium poppy over licit crop cultivation in 2012.

In 2010, coca bush cultivation remained concentrated in Bolivia (Plurinational State of), Colombia and Peru; the most marked shift was a continued decline in the area under cultivation in Colombia. While North America and Western and Central Europe continued to be the major destinations for cocaine smuggled out of South America, the scale of the cocaine phenomenon appeared to be contained in both of these well-established illicit markets. Conversely, various countries with a limited illicit market for cocaine exhibited indications of an increased availability of cocaine.

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 the nature of substances involved. Methamphetamine remained widely available in North America and Asia and the Pacific but also appeared to spread to new markets, with global seizures increasing significantly. Based on incomplete data for 2010, seizures of methamphetamine appear to have declined, following sustained increases in previous years. The availability of methylenedioxymethamphetamine (MDMA, commonly known as “ecstasy”) declined significantly between 2007 and 2009, possibly as a result of a shortage of the precursors necessary for its manufacture; while the available data for 2010 was inconclusive, some indicators suggest that the declining trend had stabilized, and possibly that availability had rebounded.

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I. Introduction

1. The present report provides an overview of developments in illicit drug production and trafficking at the global and regional levels. Analysis is based on the latest information available to the United Nations Office on Drugs and Crime (UNODC).
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 provides an update on trafficking trends with regard to 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 annual report questionnaire for 2010.
4. At the time of preparation of the present report,¹ UNODC had received replies to part IV of the annual report 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, and the Drug Abuse Information Network for Asia and the Pacific.
5. In general, statistics on drug seizures offer valid, indirect indicators of trafficking trends. They should be treated with caution, however, 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 production of plant-based drugs

A. Cannabis

6. Unlike other drug crops such as coca bush and opium poppy, cannabis plant lends itself to diverse cultivation methods, being easily grown in varied environments. That makes it difficult to assess the extent of cannabis plant cultivation and cannabis production. Nevertheless, reports of cannabis plant cultivation, together with indirect indicators, such as seizures of cannabis, suggest that cultivation of cannabis plant and production of cannabis occurred in most countries worldwide.
7. In contrast, production of cannabis resin tended to be concentrated in just a few countries, of which Afghanistan and Morocco were the most prominent examples. The most recent cannabis survey conducted by UNODC in Morocco took place in 2005. The total area under cannabis cultivation in that country was

¹ As at 31 December 2011.

estimated at 72,500 hectares (ha) in 2005. Moroccan authorities estimated the net area under cannabis cultivation (after eradication efforts) to be 60,000 ha in 2008 and 47,500 ha in 2010.

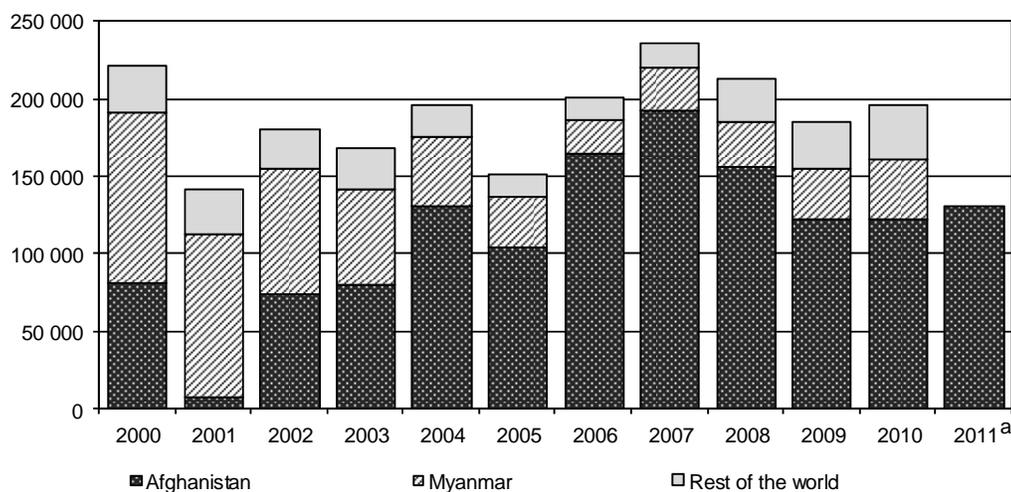
8. In 2010, UNODC and the Government of Afghanistan jointly carried out a survey on cannabis cultivation in that country, and the results showed that cannabis had become a competitor to opium poppy as a lucrative crop for farmers. Although the extent of cannabis cultivation and production could only 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 cannabis cultivation was estimated to be between 9,000 and 29,000 ha, and production of cannabis resin was estimated to be 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 in 2009 (185,935 ha). In 2010, Afghanistan accounted for 63 per cent of the total, continuing to be the country with by far 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 there and, consequently, at the global level. Global opium poppy production in 2010 was estimated at 4,860 tons, down from 7,853 tons in 2009. In 2011, however, the decline in opium production in Afghanistan was largely (although not entirely) reversed.

Figure I

Opium poppy cultivation worldwide, 2000-2011 (Hectares)

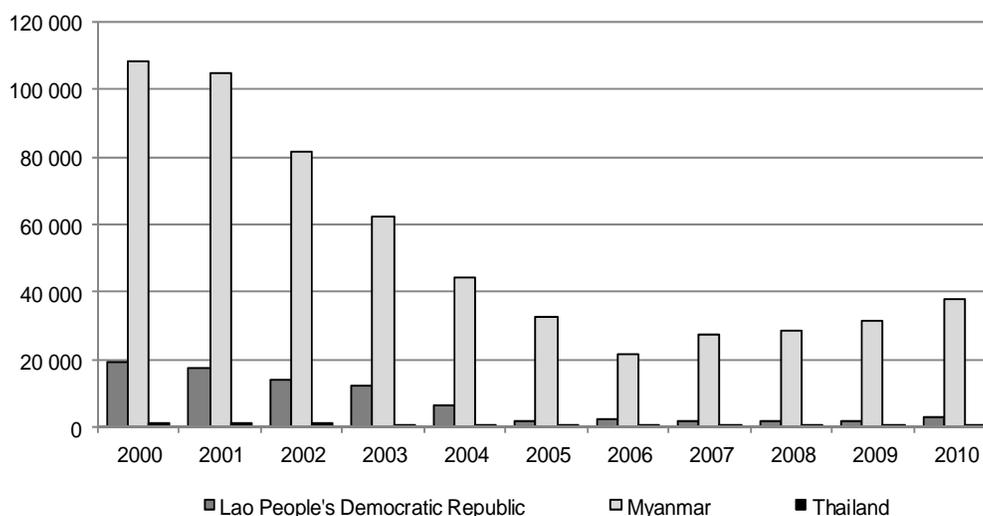


^a For 2011, data were available for Afghanistan only.

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 from the level in 2010 (3,600 tons) but still below the levels in 2006-2008. Although the southern and western parts of the country 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 northern provinces (Baghlan and Faryab) and one eastern province (Kapisa), so that the number of poppy-free provinces² fell from 20 to 17. The province of Helmand continued to account for approximately one half of the total area under opium poppy cultivation in Afghanistan. Significant increases were registered in the provinces of Uruzgan and Farah.

11. In South-East Asia, opium poppy cultivation has historically affected mainly 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 during the decade leading up to 2006, but generally increased after that year, reaching 38,100 ha in 2010 (see figure II). While still small in comparison with the peak level of 1996, the area under opium poppy cultivation in 2010 increased by about 20 per cent compared with the level in 2009 (31,700 ha) and 77 per cent compared with the level in 2006 (21,500 ha). In 2010, Shan State accounted for 92 per cent of total opium poppy cultivation in Myanmar, and Kachin State accounted for most of the remaining 8 per cent. Estimated opium production in Myanmar rose from 330 tons in 2009 to 580 tons in 2010. These figures placed Myanmar as the country in South-East Asia with by far the largest cultivation of opium poppy and production of opium.

Figure II
Opium poppy cultivation in South-East Asia, 2000-2010
(Hectares)



² "Poppy-free provinces" are provinces in which the total area under opium poppy cultivation is less than 100 ha.

12. In the Lao People's Democratic Republic, the area under opium poppy cultivation increased from 1,900 ha in 2009 to 3,000 ha in 2010. This level is still very small in comparison with those registered in the period 1996-1999, but represented the third year-on-year increase and amounted to double the level observed in 2007 (1,500 ha). The aerial survey conducted by UNODC in 2010 revealed the existence of opium poppy cultivation in two provinces in the north of the country: Phongsali and Houaphan. Eradication activities carried out by the Government of the Lao People's Democratic Republic indicated that other northern provinces were also affected by opium poppy cultivation. The estimated production of opium increased from 11 tons in 2009 to 18 tons in 2010.

13. It appeared that opium poppy cultivation was also occurring on a significant scale in Mexico. According to the Department of Justice of the United States of America,³ the supply of heroin in the United States was drawn mainly from Mexico and South America (notably Colombia), and the availability of heroin originating in Mexico was increasing. Although recent estimates from the Government of Mexico of the net area under cultivation were not available, Mexican authorities reported the eradication of 14,753 ha of illicitly cultivated opium poppy in 2009. In Colombia, the net area under cultivation was estimated at 356 ha in 2009 and 341 ha in 2010.

C. Coca

14. 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 fell slightly in 2010, owing to a continued decrease in Colombia. The illicit extraction of cocaine alkaloids from coca leaves, a first step in the manufacture of cocaine, was believed to be taking place exclusively in those 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 clandestine laboratories being seized in 2009 in Argentina, Ecuador⁴ and Venezuela (Bolivarian Republic of), as well as Mexico. In Europe, the clandestine laboratories detected in recent years were predominantly secondary extraction laboratories, used for recovering cocaine after it had been impregnated, dissolved or otherwise incorporated into other substances or materials.

15. In the Plurinational State of Bolivia, the area under coca bush cultivation remained stable, amounting to 31,000 ha⁵ in 2010. The Yungas region of La Paz continued to account for approximately two thirds of that area, with most of the remainder in the Chapare region and a much smaller area in Apolo. Data from law enforcement agencies point to intensified efforts to contain cultivation of coca bush and manufacture of cocaine: eradication of coca bush cultivation rose from 6,341 ha in 2009 to 8,200 ha in 2010 (including voluntary and forced eradication), and a

³ United States of America, Department of Justice, National Drug Intelligence Center, *National Drug Threat Assessment 2011* (August 2011).

⁴ United Nations Office on Drugs and Crime and Government of Ecuador, "Ecuador: monitoreo de cultivos de coca 2009" (June 2010).

⁵ Including 12,000 ha under coca bush cultivation permitted by Bolivian law for traditional uses (Ley del régimen de la coca y sustancias controladas, 1988).

large and increasing number of laboratories⁶ (5,965, up from 4,880 in 2009) and coca maceration pits (7,948, up from 6,664 in 2009) were seized in 2010.

16. In Colombia, coca bush cultivation fell from 73,000 ha in 2009 to 62,000 ha in 2010,⁷ while the estimated manufacture of cocaine fell from 410 tons in 2009 to 350 tons in 2010. The decline in coca bush cultivation in 2010 was the third consecutive year-on-year decrease. While cultivation was identified in 23 of the country's 32 departments in 2010, 8 departments (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 clandestine laboratories were seized in 2010.

17. In Peru, the total area under coca bush cultivation gradually increased after 2005, with the level in 2010 representing an increase of 27 per cent over a span of five years, although remaining far short of the high levels registered prior to 1996. In 2010, however, the upward trend in the total area under cultivation was contained by eradication efforts. A total of 12,253 ha under coca bush cultivation were eradicated (including through voluntary and forced eradication) in 2010. The net area under coca bush cultivation changed very little in comparison with 2009, amounting to 61,200 ha in 2010 (compared with 59,900 ha in 2009), but there was a marked shift away from the Alto Huallaga region (which accounted for 29 per cent of the total in 2009), where such cultivation fell by one quarter, and towards the three regions of Apurímac-Ene, Palcazú-Pichis-Pachitea and Marañón-Putumayo-Bajo Amazonas. Moreover, in 2010 Peruvian authorities reported dismantling 21 laboratories manufacturing cocaine salt and 1,296 laboratories yielding cocaine in base form, possibly at varying degrees of refinement.

18. Owing 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 Bolivia (Plurinational State of) and Peru were unavailable at the time of preparation of the present report; however, global manufacture of cocaine was estimated to be in the range of 842-1,111 tons in 2009 and 786-1,054 tons in 2010.

III. Trends in drug trafficking

19. 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 report questionnaire for 2010 at the time of writing. The most notable trends that emerge

⁶ Including facilities manufacturing cocaine hydrochloride, as well as intermediate products such as cocaine base and coca paste.

⁷ The estimates for 2009 and 2010 represent adjustments to the figures obtained by the methodology used for prior years. The adjustments take into account the increased incidence of fields that are too small to be reliably detected by low-resolution satellite imagery. For the purposes of comparison with years prior to 2009, the unadjusted figures were 68,000 ha for 2009 and 57,000 ha for 2010.

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 affected by the drop in opium production in Afghanistan in 2010.

Global drug seizures, 2009 and 2010

Drug Type	Seizures (kilograms)		Expected Trend ^b
	2009	2010 ^a	
Cannabis			
Cannabis herb	6 018 308	5 561 408	Stable ^c
Cannabis resin	1 258 551	968 009	Decreasing
Opiates			
Opium	653 021	349 764	Decreasing
Illicit morphine	23 710	13, 761	Decreasing
Heroin	75 833	61 984	Stable ^c
Cocaine type			
Cocaine	730 997	652 756	Stable ^c
Amphetamine-type stimulants ^d			
Amphetamine	33 119	16 546	Decreasing
Methamphetamine	31 185	39 559	Increasing
“Ecstasy”-type substances (MDA, MDEA, MDMA)	5 037	3 129	Insufficient data

Note: MDA=methylenedioxyamphetamine.

MDEA=3,4-methylenedioxyethylamphetamine.

MDMA=methylenedioxymethamphetamine.

^a Totals for 2010 subject to change as data from more countries become available. Figures in the above table reflect data received by the end of 2011. Some text and charts in the present report may, however, reflect data received after that date.

^b Since data for 2010 were incomplete, the trend was estimated by comparing total seized quantities for countries and territories for which data were available for both 2009 and 2010.

^c The term “stable” refers to a variation of less than 10 per cent.

^d Amphetamine-type stimulants are seized in various forms, including liquid and tablet form, and may be reported by mass, volume, number of tablets or other units. In specific cases, seizure amounts may be reproduced as reported by countries, but aggregate quantities are expressed by mass. In contrast with past practice, the conversion factors used for the purposes of the aggregation are intended to represent the bulk weight of the seizure, rather than the amount of psychoactive substance. As a result, the amounts in the present report differ substantially from those which appear in previous reports. The conversion factors used depend on the region, as well as the specific drug type, and are published in the World Drug Report 2011 (United Nations publication, Sales No. E.11.XI.10).

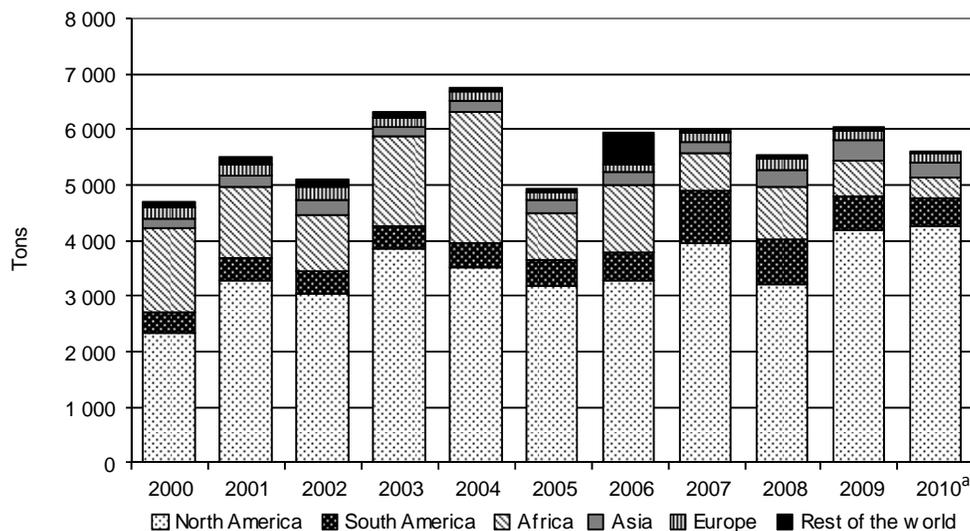
A. Cannabis

1. Cannabis herb

20. Cannabis herb continued to be illicitly used, trafficked and produced in most countries. Given the relative ease with which it may be produced, illicit demand for cannabis herb could often be met by local production, resulting in a pattern whereby trafficking flows tended to be localized in comparison with those for other plant-based drugs. Partial data for 2010 suggest that global seizures of cannabis herb

remained stable in comparison with 2009. Significant quantities of cannabis herb were seized in all regions, with the largest quantities being registered by countries in North America, South America and Africa (see figure III).

Figure III
Seizures of cannabis herb worldwide, 2000-2010
 (Tons)



^a Data for 2010 were incomplete at the time of preparation of the present report. Total excludes seizures in the Plurinational State of Bolivia.

21. The largest quantities of cannabis herb seized continued to be registered in Mexico, with seizures in that country reaching 2,105 tons in 2009 and 2,257 tons in 2010. Mexican authorities reported that the vast majority of cannabis herb exiting, as well as entering, its territory was smuggled by land; once dried, the cannabis herb was packed in plastic bags with the help of presses and hydraulic jacks and then transported to illicit markets, both in Mexico and in other countries.

22. United States authorities seized amounts of cannabis herb that were comparable to those seized in Mexico, the annual total reaching 2,049 tons in 2009 and 1,931 tons in 2010. The United States assessed that 44 per cent of the cannabis herb seized in 2010 originated in Mexico, while only 7 per cent originated in the United States and a large proportion (44 per cent) was of unknown origin. Apart from trafficking by land, trafficking by mail accounted for a significant proportion (more than one fifth) of cannabis herb seized on its way to the United States. United States authorities also reported that the rising level of cannabis cultivation in Mexico, combined with increasing high level of such cultivation in the United States, had resulted in increased availability of cannabis herb. Significant quantities of cannabis herb from Canada are smuggled into the United States. Canadian authorities seized 51 tons of cannabis herb and 1.9 million cannabis plants in 2010, and United States authorities assessed that 12 per cent of all the cannabis herb

entering the United States in 2010 had entered the country from Canada (although not necessarily all of the cannabis herb was produced in Canada).

23. Several countries in South America reported large quantities of seized cannabis herb in 2009 and 2010. In Colombia, the total amount of seized cannabis herb rose from 209 tons in 2009 to 255 tons in 2010. Brazil registered seizures of cannabis herb totalling 155 tons in 2010; and in Paraguay, which had been associated with extensive cultivation of cannabis, such seizures reached 84 tons in 2009. The total amount of cannabis herb seized in Argentina appeared to decline sharply, from 92 tons in 2009 to 36 tons in 2010,⁸ while seizures in the Bolivarian Republic of Venezuela rose from 33 tons in 2009 to 39 tons in 2010.

24. In recent years, the Plurinational State of Bolivia has reported very large quantities of seized cannabis herb. Authorities there reported having seized a total of 1,073 tons of cannabis herb in 2010; however, that figure likely includes large quantities of cannabis plant that were eradicated. A breakdown of that figure, indicating the quantities of seized cannabis herb, was not available. Nevertheless, the aggregate quantity denotes a notable long-term increase, as the level in 2010 was more than eight times that in 2006 (125 tons).

25. India reported having seized a total of 173 tons of cannabis herb in 2010 and assessed that 18 per cent of the seized cannabis herb originated in Nepal. Nepal seized 17 tons of cannabis herb in 2009. In Indonesia, the total amount of seized cannabis herb fell sharply, from 111 tons in 2009 to 23 tons in 2010. By contrast, the upward trend in the amount of cannabis herb seized in Turkey, where seizures stood at 5.5 tons in 2002, continued into 2010, when seizures reached 44 tons.

26. Several African countries recorded large annual amounts of cannabis herb seized. Cannabis herb seizures rose sharply in the United Republic of Tanzania, from 56 tons in 2009 to 280 tons⁹ 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 that can be further processed into cannabis resin.¹⁰ Seizures of “kif” in Morocco fell from 223 tons in 2009 to 187 tons in 2010. In 2009, the amount of seized cannabis herb totalled 126 tons in South Africa, 115 tons in Nigeria and 38 tons in Zambia. Although for Nigeria seizure data for 2010 were not available, a further 155 tons of cannabis herb were seized in that country between August 2010 and June 2011.¹¹

⁸ It was not clear to what extent seizures in 2009 and 2010 were comparable, as the quantity for 2010 did not include seizures by federal forces (if any).

⁹ Direct communication by Tanzanian authorities.

¹⁰ H. Stambouli and others, “Cultivation of *Cannabis sativa* L. in northern Morocco”, *Bulletin on Narcotics*, vol. LVII, Nos. 1 and 2 (2005), pp. 79-118.

¹¹ Country report submitted by Nigeria to the Twenty-first Meeting of Heads of National Drug Law Enforcement Agencies, Africa, held in Addis Ababa from 5 to 9 September 2011.

2. Cannabis resin

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

28. Although the illicit supply of cannabis resin from Afghanistan may have made inroads into new markets, the illicit market for cannabis resin in Europe continued to be supplied mainly by production in Morocco. In 2009 and 2010, the majority of reporting countries in Western and Central Europe continued to identify Morocco as a country of origin for cannabis resin, although two countries made reference to Afghanistan.

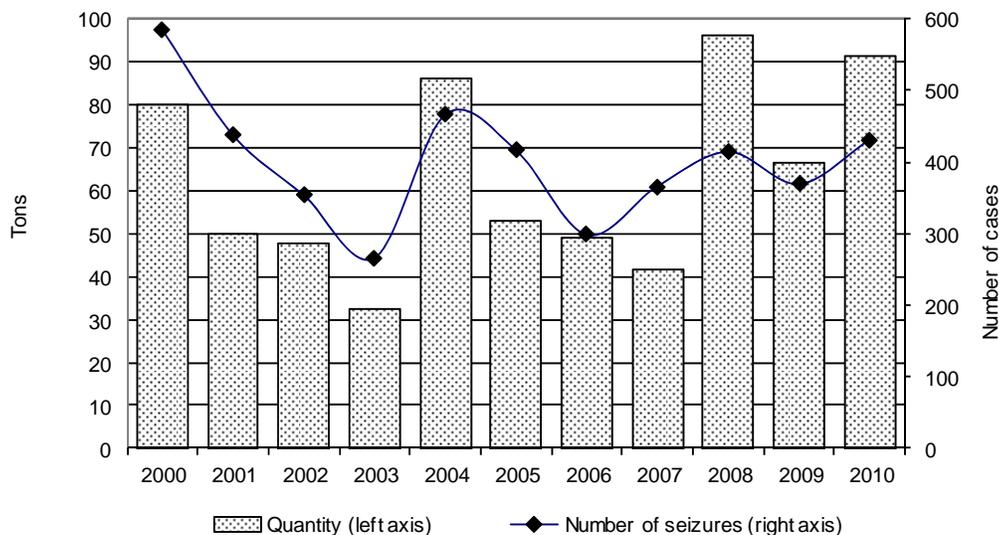
29. Spain continued to be a gateway through which cannabis resin from Morocco reached Europe; in 2010, however, seizures in Spain fell for the second consecutive year, to 384 tons, the lowest level since 1997. Nevertheless, this was the highest annual total reported by a single country worldwide in 2010. Spain assessed that 90 per cent of seized cannabis resin had originated in Morocco. In Portugal, seizures rose from 23 tons in 2009 to 35 tons in 2010, while remaining significantly below the peak level of 2008.

30. In Morocco, the total amount of seized cannabis resin reached a record level — 188 tons — in 2009 but in 2010 receded to 119 tons, a level comparable to the levels recorded prior to 2009. Morocco noted the emergence of a new development in trafficking in cannabis — the use of light aircraft — and attributed the decline in seizures to efforts by authorities both within the country, to counter the illicit cultivation of cannabis, and 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.

31. In recent years, Afghanistan has increased in importance as a source of cannabis resin. In 2009 and 2010, Afghanistan was mentioned as a country of origin for cannabis resin by countries in the Near and Middle East/South-West Asia, Central Asia, Eastern Europe, South-Eastern Europe, Western and Central Europe and North America. The amount of cannabis resin seized in Afghanistan fell from a record level in 2008 (271 tons) to a relatively low level of 10.5 tons in 2009, accounting for slightly less than 1 per cent of the total amount seized worldwide in 2009.

32. In Pakistan, seizures of cannabis resin increased sharply between 2007 and 2009 and edged slightly higher in 2010 to 212 tons, almost twice the level in 2007 and the highest level since 1995. Pakistan assessed that all of the cannabis resin seized on its territory in 2010 originated in Afghanistan and identified Canada and Sri Lanka as countries of destination. In 2010, 46 per cent of significant individual drug seizures reported by Pakistan involved cannabis resin (see figure IV).

Figure IV
Significant cannabis resin consignments originating in Afghanistan and seized in Pakistan, 2000-2010



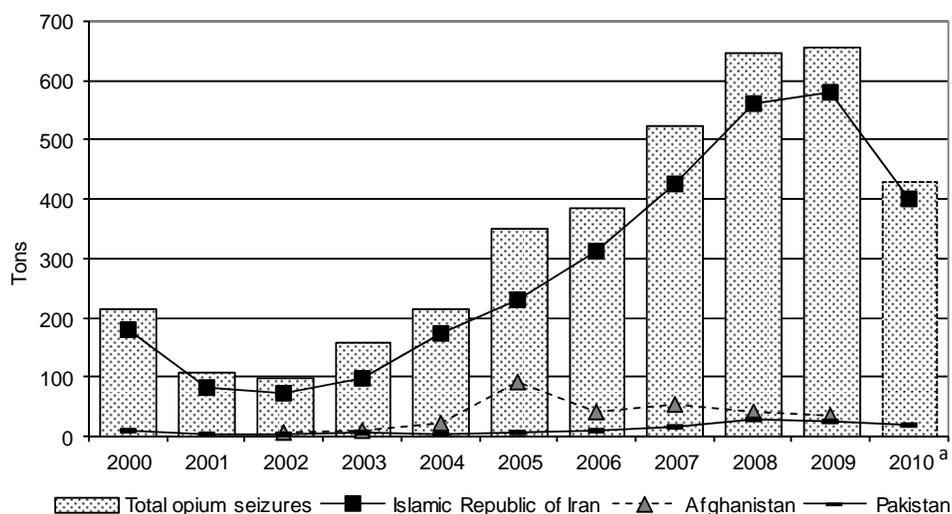
Note: The above figure is based on records of significant seizure cases submitted by Pakistan on a case-by-case basis.

B. Opiates

1. Opium

33. Global seizures of opium grew at a marked, sustained pace during the period 2002-2008 and stabilized in 2009 at 653 tons. Incomplete data for 2010 suggest that, following a significant decline in opium production in Afghanistan, seizures of opium declined significantly. Since 2004, three countries — Afghanistan, Iran (Islamic Republic of) and Pakistan — have consistently accounted for more than 90 per cent of global seizures of opium (see figure V).

Figure V
Global seizures of opium, 2000-2010
(Tons)



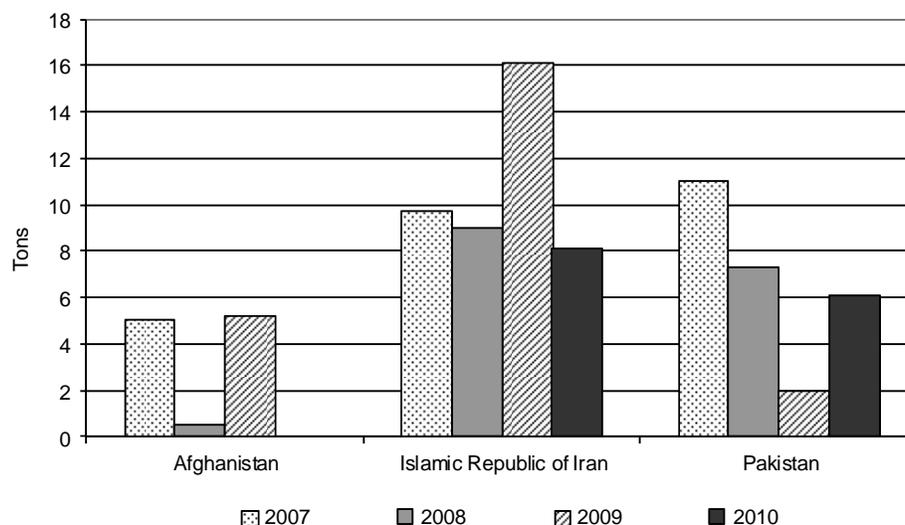
^a For 2010, no data were available for Afghanistan. The total for 2010 is based on incomplete data and subject to revision.

34. According to UNODC data, the Islamic Republic of Iran has, every year since 1980, registered the highest annual total amount of opium seized by a single country. During the period 2002-2009 in particular, opium seizures increased almost eightfold, climbing from 73 tons to 580 tons. In 2010, the trend was reversed, as such seizures fell to 401 tons.

2. Morphine

35. As in the case of opium, seizures of morphine continued to be concentrated in or close to Afghanistan. Every year from 2005 onwards, three countries — Afghanistan, Iran (Islamic Republic of) and Pakistan — together accounted for more than 90 per cent of the total amount of morphine seized worldwide. Since 2008, the Islamic Republic of Iran has registered the highest amount of morphine seized by a single country. In 2009, morphine seizures shifted markedly from Pakistan, where they declined by 73 per cent, to the Islamic Republic of Iran, where they rose by 80 per cent. In 2010, however, morphine seizures in both countries returned to levels comparable to those recorded in 2008, amounting to 8.1 tons in the Islamic Republic of Iran and 6.1 tons in Pakistan (see figure VI). The large quantities seized outside Afghanistan suggest that the supply of morphine exceeded the limited demand for that substance among illicit drug users; it was not clear whether the surplus was further processed into heroin (and if so, where).

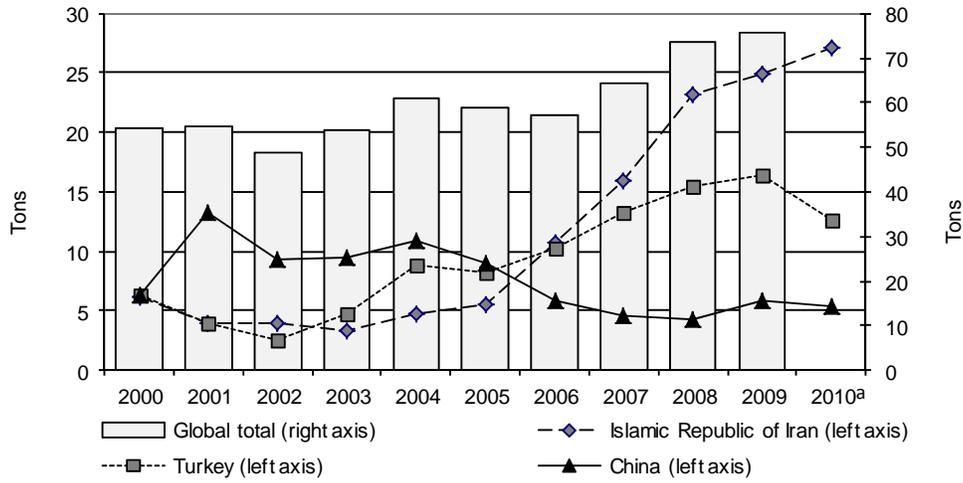
Figure VI
**Seizures of morphine in Afghanistan, Iran (Islamic Republic of) and Pakistan,
 2007-2010**
 (Tons)



3. Heroin

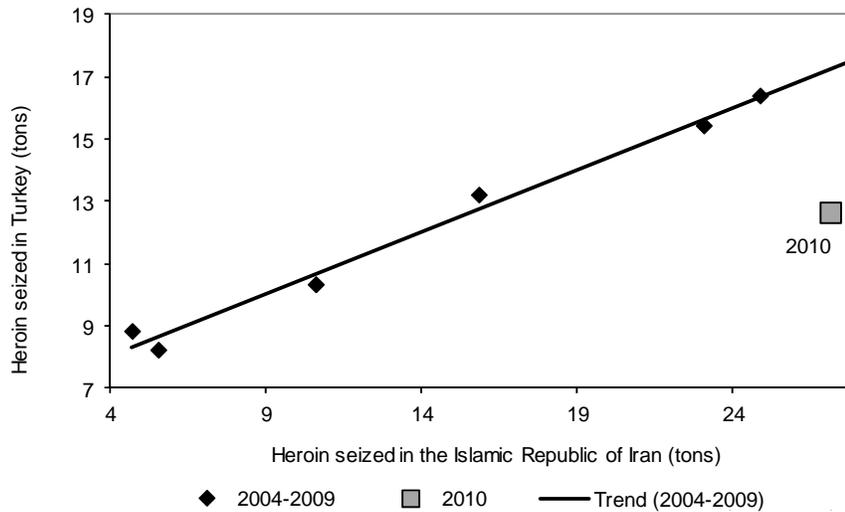
36. Global seizures of heroin increased significantly during the period 2006-2009, reaching 76 tons. Incomplete data indicate that the global total stabilized in 2010 (see figure VII). Large quantities of heroin continued to be smuggled along the established route, often referred to as the Balkan route, leading from Afghanistan to Western and Central Europe via the Middle East and South-Eastern Europe. In terms of the amount of heroin seized, the largest totals continued to be reported by Iran (Islamic Republic of) and Turkey, two important transit countries on the Balkan route. During the period 2004-2009, the total amount of heroin seized in each of the two countries appeared to be very closely related, but 2010 saw a marked departure from the trend, with seizures of heroin in the Islamic Republic of Iran continuing to increase, while such seizures decreased in Turkey (see figure VIII). Nevertheless, significant quantities of heroin were also seized closer to the major illicit markets for heroin.

Figure VII
Seizures of heroin worldwide and in selected countries, 2000-2010
 (Tons)



^a Data for 2010 were incomplete at the time of preparation of the present report.

Figure VIII
Seizures of heroin in Turkey in relation to seizures of heroin in the Islamic Republic of Iran, 2004-2010
 (Tons)



37. Between 2003 and 2010, seizures of heroin in the Islamic Republic of Iran rose eightfold, reaching 27 tons in 2010, a rate of growth equivalent to seven year-on-year increases of 35 per cent. Iranian authorities also reported an increase in opiates transiting the country's territory in 2011, owing to the rebound in opium production in Afghanistan in 2011. In Pakistan, seizures of heroin doubled in 2010, reaching 4.2 tons. According to provisional data for 2011 from the authorities of Pakistan,¹² the increase continued into 2011, with seizures reaching 5.3 tons, the highest level in that country since 2003.

38. In spite of the increases in seizures of heroin in Iran (Islamic Republic of) and Pakistan, there were signs of the availability of heroin being reduced near some of the major illicit heroin markets that were supplied by heroin originating in Afghanistan. In Turkey, seizures of heroin fell from 16.4 tons in 2009 to 12.7 tons in 2010. In addition to Iran (Islamic Republic of) and Pakistan, Turkey mentioned Iraq as a transit country for heroin consignments entering its territory. Moreover, while heroin was smuggled into Turkey exclusively by land, 10 per cent of heroin exiting the country was smuggled by sea. According to Turkish authorities,¹³ the decrease in opium production in Afghanistan in 2010 also had an impact on seizures of heroin in Turkey.

39. Some indicators from other European countries also pointed to a reduced availability of heroin in the European market in 2010. According to authorities¹⁴ in the United Kingdom of Great Britain and Northern Ireland, seizures of heroin in England and Wales¹⁵ fell from 1.5 tons during the period April 2009-March 2010 to 732 kg during the period April 2010-March 2011. The average purity of heroin seized by police forces and analysed by the Forensic Science Service of the United Kingdom fell from 46 per cent in the last quarter of 2009 to 16 per cent in the first quarter of 2011. These seizures likely reflect more closely the retail rather than the wholesale market, but a similar, albeit slightly less pronounced, decrease was also observed in the purity of seizures made by the United Kingdom Border Agency, which fell from 58 per cent in the third quarter of 2009 to 31 per cent in the last quarter of 2010 (see figure IX).

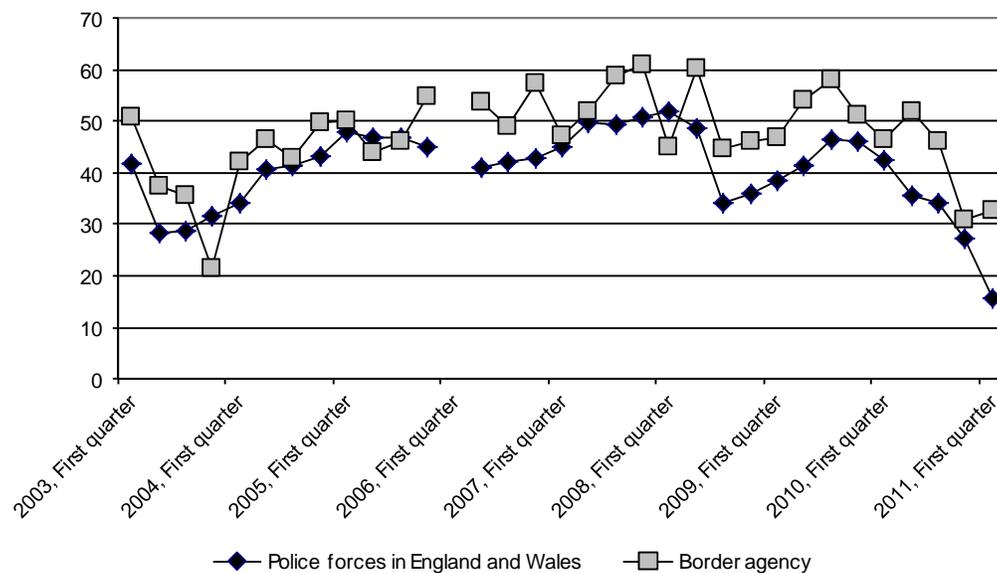
¹² Country report submitted by Pakistan to the Subcommission on Illicit Drug Traffic and Related Matters in the Near and Middle East, at its forty-sixth session, held in Vienna from 19 to 22 December 2011.

¹³ Country report submitted by Turkey to the Subcommission on Illicit Drug Traffic and Related Matters in the Near and Middle East at its forty-sixth session.

¹⁴ Kathryn Coleman, *Seizures of Drugs in England and Wales, 2010/11*, Home Office Statistical Bulletin 17-11 (London, Home Office, November 2011).

¹⁵ Total seizures for the United Kingdom as a whole for these periods, or for the calendar years 2009 and 2010, were unavailable.

Figure IX
Heroin in purity in seizures made by authorities in the United Kingdom, by quarter, 2003-2011
 (Percentage)



Note: Data for the first quarter of 2006 were unavailable.

Source: United Kingdom Home Office.

40. In terms of the total amount of heroin seized, the overall trend in Western, Central and South-Eastern Europe in 2010 was downward. The annual heroin seizure total declined in 2010, in comparison with 2009, not only in the United Kingdom, but also in several other European countries, notably Bulgaria (by 72 per cent), Portugal (by 63 per cent), Austria (by 49 per cent), Germany (by 37 per cent), Spain (by 22 per cent), Italy (by 18 per cent), Greece (by 12 per cent) and the Netherlands (by 8 per cent). The most notable exceptions were increases in Belgium (40 per cent), Switzerland (29 per cent) and France (12 per cent). Authorities in France noted a substantial increase in the typical wholesale price of heroin (from 10,000 euros per kilogram in 2009 to 12,000 euros per kilogram in 2010), and authorities in Switzerland reported sporadic shortages of heroin in 2010, with the typical purity of heroin base falling both at the wholesale level (from 40 per cent in 2009 to 23 per cent in 2010) and at the retail level (from 21 per cent in 2009 to 16 per cent in 2010).

41. The Russian Federation remained another major illicit market that derived its heroin supply from illicit opium production and heroin manufacture in Afghanistan. Heroin from Afghanistan continued to be smuggled northwards via Central Asia into the Russian Federation, which identified Kazakhstan, Kyrgyzstan and Tajikistan, as well as Azerbaijan and Iran (Islamic Republic of), as major transit countries for heroin reaching its territory in 2010. The amount of heroin seized in the Russian Federation fell from 3.2 tons in 2009 to the historically low level of 2.6 tons in 2010.

42. With the notable exception of Uzbekistan, the overall trend in seizures of heroin in Central Asia, the major transit area used for smuggling heroin from Afghanistan into the Russian Federation, was also downward in 2010.

43. China continued to be an important illicit market for heroin. In 2008, 2009 and (according to incomplete data) 2010, China accounted for the third-largest quantity of heroin seized annually by a single country. Heroin seizures in China rose significantly from 4.3 tons in 2008 to 5.8 tons in 2009 and appeared to recede slightly in 2010, to 5.4 tons. For several years, the source of heroin in China had been illicit opium poppy cultivation and heroin manufacture in South-East Asia, notably Myanmar. In recent years, however, significant quantities of heroin from Afghanistan appeared to have been smuggled into China via Pakistan and possibly other intermediate countries. Nevertheless, it is believed that large amounts of heroin also continued to enter China from northern Myanmar via Yunnan Province of China.

44. Reports from various countries confirmed that heroin from South-West Asia had made inroads into the illicit markets of Asia and the Pacific, alongside opiates from South-East Asia, a more established source area for the region. Forensic profiling of seizures of heroin effected at the Australian border indicated that in 2010 heroin originating in South-West Asia accounted for a majority of the bulk weight of analysed seizures of the drug, while heroin originating in South-East Asia accounted for a majority in terms of the number of seizures.¹⁶ For 2010, Australia also reported the highest quantity of heroin ever seized in that country in a single year: 738 kg (up from 195 kg in 2009).

45. In the United States, seizures of heroin rose by almost one half, from 2.4 tons in 2009 to a record level of 3.5 tons in 2010. United States authorities reported that increased heroin manufacture in Mexico and the increased involvement of Mexican transnational criminal organizations in the distribution of South American heroin had contributed to wider heroin availability in many illicit markets in the United States, including in some markets where the drug had previously been unavailable. Heroin reaching the illicit markets in the United States originated not only in Mexico, but also in South American countries, notably Colombia. In 2010, seizures of heroin also reached record levels in Colombia (1.7 tons, more than twice the level in 2009) and Ecuador (853 kg, almost five times the level in 2009), while in Mexico the increase was less pronounced (from 283 kg in 2009 to 374 kg in 2010).

C. Cocaine

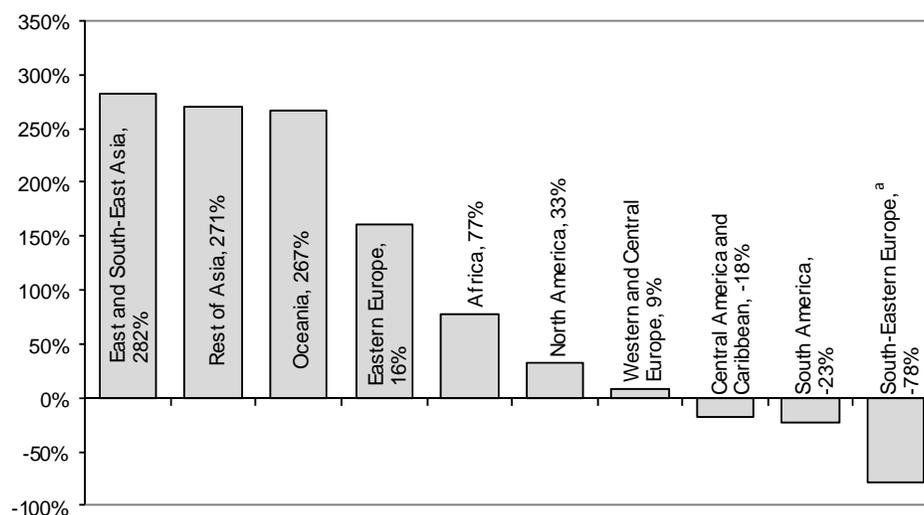
46. The world's main illicit markets for cocaine, in North America and Western and Central Europe, continue to be supplied by trafficking routes originating in South America, notably the Andean countries. Cocaine is mainly smuggled northwards into North America or across the Atlantic into Europe (directly or via the Caribbean or Africa).

47. Global seizures of cocaine have remained stable for several years, ranging from 690 tons to 731 tons during the period 2006-2009. At the time of preparation

¹⁶ Australian Crime Commission, *Illicit Drug Data Report 2009-10* (Canberra, June 2011).

of the present report, incomplete data suggested 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. While seizures of cocaine appeared stable in the Americas and in Western and Central Europe, several regions where cocaine trafficking has so far been limited showed a clear upward trend (see figure X). In 2010, several countries not previously associated with cocaine trafficking or abuse on a large scale registered moderate but sharply increasing (in comparison with 2009) seizures of cocaine. Those countries included Australia, China, Estonia, Latvia, Lithuania, Pakistan, the Philippines, the Russian Federation and Turkey.

Figure X
Year-on-year trends in seizures of cocaine, 2010 in comparison with 2009, by region
 (Percentage increase or decrease)



Note: Seizure data for 2010 are incomplete. The comparison was made on the basis of data for a restricted set of 86 countries and territories for which seizure data were available for both 2009 and 2010.

^a The overall decline in South-Eastern Europe is mainly the result of a single, extraordinarily large seizure in Romania in 2009.

48. In South America, Colombia continued to account for the largest quantity of cocaine seized, although that figure fell from 253 tons in 2009 to 211 tons in 2010. Colombian authorities mentioned the use of submersible and semi-submersible vessels as one of the most important strategies for cocaine trafficking and assessed that in 2010, 56 per cent of seized cocaine salts had been smuggled along maritime routes and 41 per cent had been smuggled by land. In Peru, seizures of cocaine rose by almost one half in 2010, reaching 31 tons, the highest level in that country since 1990. Peru reported that groups comprised of Colombian and Mexican nationals were active in cocaine trafficking within its territory. In the Plurinational State of Bolivia,

seizures of cocaine edged slightly higher than the already increased levels of 2008 and 2009, reaching a record level of 29 tons.¹⁷

49. According to Ecuadorean authorities,¹⁸ Ecuador is believed to be used by traffickers for the stockpiling, storage and distribution of drugs, trafficking in precursor chemicals and other drug-related offences. Seizures of cocaine in Ecuador reached a record level of 65 tons in 2009, but fell to 15 tons in 2010, the lowest level since 2004. Ecuadorean authorities attributed the decline to a change in the trafficking patterns, following the increased impact of law enforcement activities in 2009. In 2010, significant quantities of cocaine were also seized in Brazil (27 tons), the Bolivarian Republic of Venezuela (25 tons), Chile (9.9 tons) and Argentina (7.3 tons).

50. Large quantities of cocaine continued to be seized in Panama; the figure for 2010 — 53 tons of cocaine — was the third largest quantity seized in a single country (after Colombia and the United States). According to United States authorities,¹⁹ traffickers used Panama's coast and its transportation infrastructure, including four major containerized seaports, the Pan-American Highway and an expanded airport, to facilitate the movement of licit and illicit commodities.

51. The United States continued to have a major illicit market for cocaine, and Mexico continued to be a key transit country for illicit cocaine consignments entering the United States. While seizures by United States authorities rose substantially, from 108 tons in 2009 to 163 tons in 2010, seizures in Mexico fell from 21.6 tons to 9.4 tons, the lowest level since 1987. According to United States authorities, the southern parts of California and Texas were the primary entry points for cocaine. The availability of cocaine in the United States has declined since 2007, and in 2011 it was expected to remain below the 2007 level. Based on all cocaine purchases recorded in the United States System to Retrieve Information from Drug Evidence (STRIDE) database, including transactions at both the retail level and the wholesale level, the average purity-adjusted price of cocaine rose sharply between the second and fourth quarters of 2008 (from \$124 to \$197 per pure gram) and remained relatively high until the third quarter of 2010 (\$165 per pure gram). Conflict among the various drug trafficking cartels, as well as drug control operations, disrupted the ability of traffickers to move cocaine from South America towards the United States.²⁰ Mexican authorities reported that criminal organizations had had to reorganize following the struggles for the control of trafficking routes and the strategy of joint operations by Mexican authorities.

52. Seizures of cocaine in Western and Central Europe peaked at 121 tons in 2006; after that, they declined for three years in a row, to 53 tons in 2009. In 2010, however, seizures of cocaine appeared to stabilize or rebound in several European countries, notably: Spain, where such seizures remained stable, at 25 tons; the Netherlands, where seizures rose to 10 tons, a level comparable to those registered

¹⁷ Data submitted by Bolivian authorities to UNODC.

¹⁸ Country report submitted by Ecuador to the Twenty-first Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean, held in Santiago from 3 to 7 October 2011.

¹⁹ United States, Department of State, Bureau for International Narcotics and Law Enforcement Affairs, *International Narcotics Control Strategy Report* (March 2011).

²⁰ *National Drug Threat Assessment 2011* (see footnote 3).

in 2006 and 2007; Belgium, where seizures rose to 6.8 tons, the highest level since 2005; and Germany, where seizures rose sharply to a record level of 3.0 tons. Nevertheless, in 2010, seizures of cocaine in Western and Central Europe remained well below the peak level of 2006.

53. A secondary route for smuggling cocaine across the Atlantic into Europe involves the use of countries in Africa, notably West Africa, as transit countries. In Nigeria, seizures of cocaine increased from 392 kg in 2009 to 707 kg in 2010 (the highest level recorded in Africa in 2010).

D. Amphetamine-type stimulants

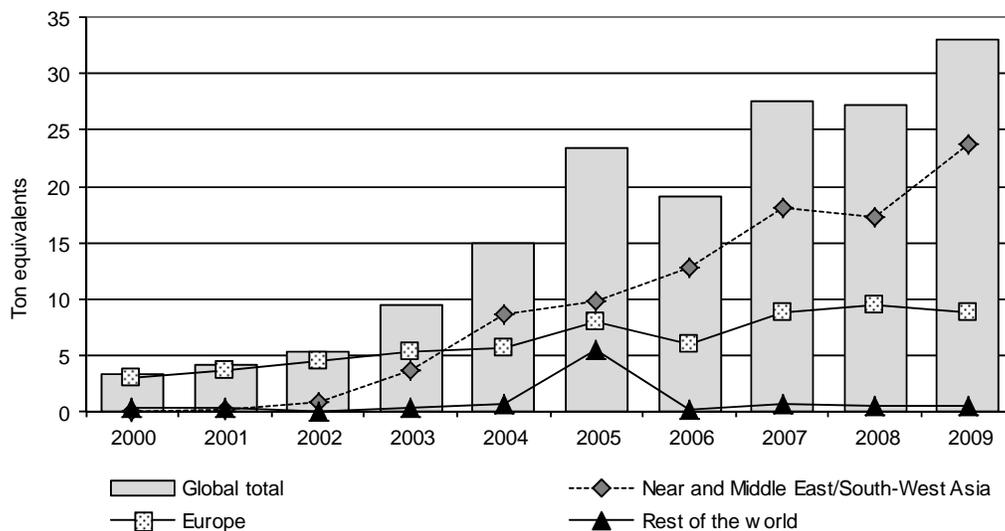
1. Amphetamine

54. Global seizures of amphetamine followed a generally upward trend during 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 illicit market for amphetamine, in terms of total quantity seized (see figure XI). Incomplete data suggest that seizures in the Near and Middle East/South-West Asia may have receded in 2010. In particular, seizures in Saudi Arabia, a major illicit market for Captagon tablets, fell from 12.4 tons in 2009 (the largest worldwide 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, Europe has been the source of the amphetamine present in Captagon tablets seized in the Near and Middle East/South-West Asia, and countries such as Jordan, the Syrian Arab Republic and Turkey have been used as transit areas; it is unclear to what extent those countries may have been supplanted by others.

55. In Western and Central Europe, seizures of amphetamine rose significantly during the period 2000-2007. Those increased levels were maintained 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.²¹

²¹ Estimate for the United Kingdom based on data for the financial year 2010/2011, in comparison with the financial year 2009/10, which do not cover all jurisdictions in the country. Comprehensive data for calendar years covering the entire territory of the United Kingdom are not available.

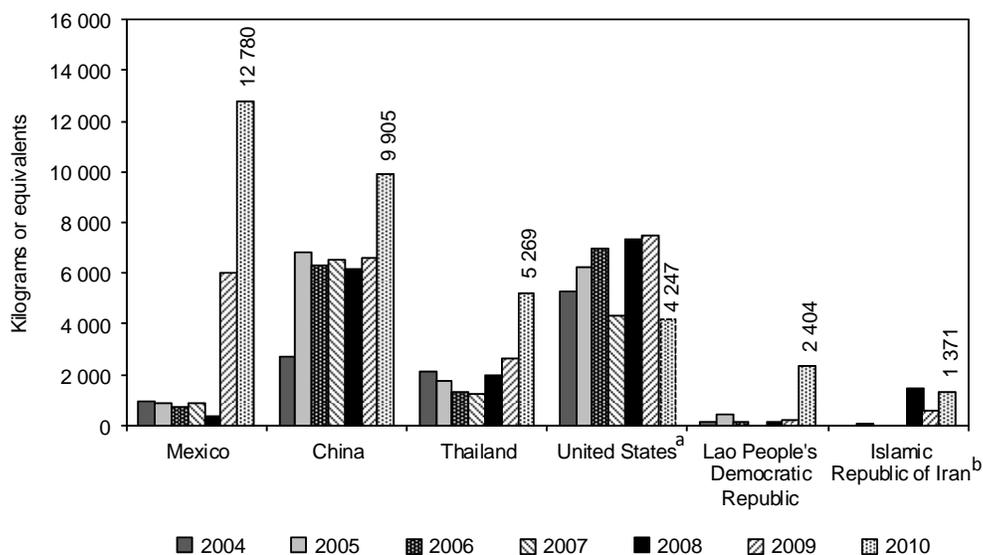
Figure XI
Breakdown of global seizures of amphetamine, 2000-2009
 (Ton equivalents)



2. Methamphetamine

56. During the period 2004-2010, the global market for methamphetamine appeared to be expanding significantly (see figure XII). Methamphetamine remained widely available in several established illicit markets, and new patterns of illicit methamphetamine manufacture, trafficking and use appeared to emerge which involved countries and regions not previously associated with the phenomenon. Globally, the amount of methamphetamine seized rose from 22 tons in 2008 to 31 tons in 2009; preliminary data suggested that the total for 2010 would exceed 40 tons.

Figure XII
Seizures of methamphetamine in selected countries, 2004-2010
 (Kilograms or equivalents)



^a For the United States, seizure data for 2010 are preliminary.

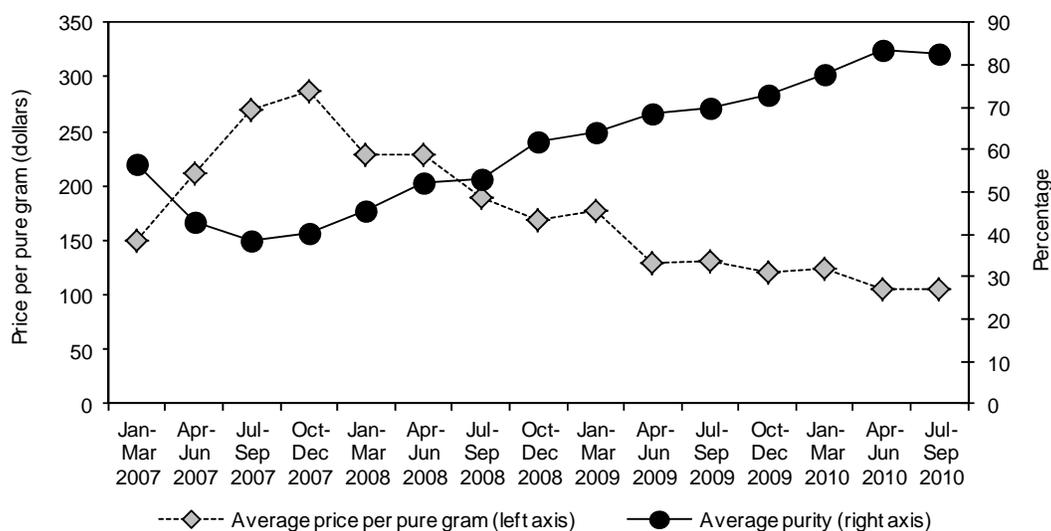
^b For the Islamic Republic of Iran, seizure data for 2009 refer to the first nine months only.

57. Large quantities of methamphetamine continued to be illicitly manufactured in Mexico and smuggled into the United States. Seizures of methamphetamine in Mexico increased sharply; they had never exceeded 1 ton prior to 2009, but they rose to 6.1 tons in 2009 and 12.8 tons in 2010. A similar trend was observed in the number of clandestine methamphetamine laboratories seized; while the number of such laboratories seized each year had never exceeded 34 prior to 2009, it reached 191 in 2009 and 128 in 2010. Mexican authorities reported that clandestine methamphetamine laboratories were detected primarily in states on the Pacific coast, such as Michoacan, Jalisco and Sinaloa, and to a lesser extent in states in the central part of the country, such as Guanajuato.

58. Data on methamphetamine prices and purity published by the United States Department of Justice²⁰ suggest that the availability of methamphetamine in the United States increased (see figure XIII). According to the same source, in the financial year 2010, seizures of methamphetamine in the United States rose by 32 per cent in comparison with the previous financial year.²² Moreover, high levels of manufacture in Mexico, along with an increase in the number of domestic manufacturing operations, combined to make methamphetamine readily available throughout the United States. In 2010, 2,754 laboratories illicitly manufacturing methamphetamine powder were seized in the United States.

²² The United States reported to UNODC seizures of 4.2 tons of methamphetamine in 2010; however, it was not clear if that was comparable with the quantity of 7.5 tons and 40 thousand tablets reported seized in 2009.

Figure XIII
**Purity and purity-adjusted price of methamphetamine in the United States:
 average of all recorded methamphetamine purchases, by quarter, 2007-2010**



59. Seizures of methamphetamine also rose markedly in East and South-East Asia, from 12 tons in 2008 to 16 tons in 2009 and 20 tons in 2010. China continued to be affected by large-scale illicit methamphetamine manufacture, trafficking and abuse. Throughout the period 2005-2009, annual seizures of methamphetamine reported by China ranged between 6 and 7 tons; in 2010, such seizures rose to 9.9 tons. This appears to include large and increasing quantities of both crystal methamphetamine (4.2 tons, up from 2.5 tons in 2009) and methamphetamine tablets (58 million tablets, up from 41 million tablets in 2009). Methamphetamine was smuggled out of Myanmar into Yunnan Province, of China and also into the Chinese provinces of Guangdong and Guangxi. Illicit manufacture of amphetamine-type stimulants in China nevertheless continued on a large scale. In 2010, Chinese authorities dismantled 378 clandestine laboratories, of which a large proportion were likely manufacturing methamphetamine. Moreover, data relative to the first quarter of 2011 suggest that illicit manufacture of amphetamine-type stimulants in China was on the rise.²³

60. Reports from various countries pointed to a recent pattern of methamphetamine being smuggled out of the Islamic Republic of Iran into East and South-East Asia. Iranian authorities seized 1.4 tons of methamphetamine, as well as an unspecified number of clandestine methamphetamine laboratories, in 2010.

61. Until recently, Africa appeared to be largely unaffected by trafficking in or illicit use of or manufacture of amphetamine-type stimulants; however, since 2008, an increase in seizures of methamphetamine in countries in East Asia (primarily

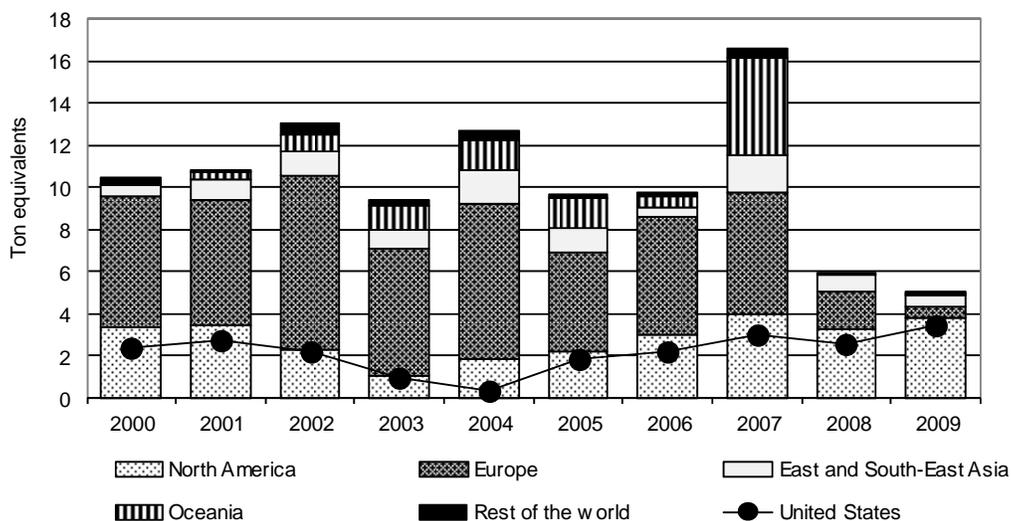
²³ Presentation of the National Narcotics Control Commission of China at the global Synthetics Monitoring: Analysis, Reporting and Trends (SMART) programme regional workshop, held in Bangkok from 18 to 20 July.

Japan and the Republic of Korea) has pointed to the possibility of methamphetamine being illicitly manufactured in West Africa. In 2009, evidence of the possibility of illicit manufacture of amphetamine-type stimulants was found in Guinea; and in 2010 the Government of the United States indicted members of a large international cocaine trafficking organization for, inter alia, allegedly intending to establish in Liberia a laboratory for illicitly manufacturing methamphetamine on a large-scale. In June 2011, a clandestine methamphetamine laboratory was discovered in Nigeria, on the outskirts of Lagos.

3. “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 16.6 tons in 2007 to 6.0 tons in 2008 and 5.0 tons in 2009 (see figure XIV). The decline was possibly the result of reduced availability of the precursors required for the manufacture of methylenedioxymethamphetamine (MDMA, commonly known as “ecstasy”). It was accompanied by a tendency to resort to other psychoactive ingredients, some of which are not under international control, both alongside MDMA and as an alternative to that substance. As illicit manufacturers of MDMA switch to other methods for manufacturing MDMA and alternative precursors, however, the availability of MDMA is susceptible to a possible rebound. Incomplete data for 2010 suggest that, while the availability of MDMA was still relatively low, the downward trend had stabilized or possibly reversed.

Figure XIV
Seizures of “ecstasy” worldwide, 2000-2009
(Ton equivalents)



63. One notable exception to the overall downward trend in the “ecstasy” market prevalent worldwide in recent years has been the illicit market in North America. According to United States authorities,²⁰ high levels of MDMA manufacture by criminal organizations based in Canada and increased MDMA trafficking by

Mexican criminal organizations, have increased the availability of MDMA in the United States. Between 2006 and 2009, seizures of “ecstasy” tablets in the United States rose from 2.6 million to 4.6 million, while seizures of other forms of “ecstasy” rose from 1.5 to 2.3 tons. Based on data published by the National Drug Intelligence Centre of the United States Department of Justice, in the financial year 2010, aggregate seizures of “ecstasy” fell only slightly (by 14 per cent) in comparison with such seizures in the previous financial year.
