

**Economic and Social Council**Distr.: General
5 January 2017

Original: English

Commission on Narcotic Drugs**Sixtieth session**

Vienna, 13-17 March 2017

Item 5(b) of the provisional agenda*

**Implementation of the Political Declaration and
Plan of Action on International Cooperation
towards an Integrated and Balanced Strategy to
Counter the World Drug Problem: supply
reduction and related measures****World situation with regard to drug trafficking****Report of the Secretariat***Summary*

The present report provides an overview of the latest trends in the illicit production of and trafficking in drugs worldwide. The statistics and analysis in the report are based on the latest information available to the United Nations Office on Drugs and Crime. The report presents trends in drug seizures and statistics on the illicit cultivation of drug crops up to 2015 and, where available, 2016.

Illicit opium poppy cultivation remains concentrated in Afghanistan, where it increased again in 2016 after decreasing for the first time in six years in 2015. The majority of opium and morphine seizures continue to occur in Afghanistan and neighbouring countries, while heroin seizures occur over a wider geographic area. Coca bush cultivation and the quantity of cocaine seized globally increased in 2015, with record seizures reported in South America. Preliminary data suggest that global seizures of amphetamine-type stimulants increased in 2015 for the second consecutive year. Cannabis herb continues to be cultivated, as well as seized, in most countries worldwide and in all regions of the world, while the production of cannabis resin remains confined to a few countries in South-West Asia and North Africa. Global seizures of cannabis resin are concentrated in the same regions and in the European consumer market.

* E/CN.7/2017/1.



I. Introduction

1. The present report provides an overview of developments in the production of and trafficking in the main illicit drugs at the global and regional levels. The analysis includes information available to the United Nations Office on Drugs and Crime (UNODC) up to December 2016.

2. Section II addresses the illicit cultivation of drug crops and production of plant-based drugs for the years up to and including 2015 and, where available, 2016. Section III discusses drug trafficking and seizures. It focuses on seizure statistics for 2015 and previous years and provides an update on trafficking trends with regard to cannabis, opiates, cocaine and amphetamine-type stimulants.

3. The principal sources of information on the illicit cultivation of drug crops and the production of plant-based drugs are the latest UNODC illicit crop monitoring surveys. In addition, replies by Governments to part IV of the annual report questionnaire for 2015 provide the primary source of information on drug trafficking patterns and seizures of illicit drugs.

4. As of December 2016, UNODC had received replies to part IV of the annual report questionnaire from 90 Member States and two territories. Supplementary sources of information include official published government reports and reports submitted to the subsidiary bodies of the Commission on Narcotic Drugs. The *World Drug Report 2016*¹ also aided the analysis of the current situation with regard to drug trafficking. In total, seizure data for 2015 were available for 108 States and territories.

5. In general, statistics on drug seizures offer valid indirect indicators of drug trafficking trends. However, seizure statistics should be treated with caution, since they also reflect different reporting practices.

II. Global trends in illicit cultivation of drug crops and production of plant-based drugs

A. Cannabis herb cultivation and cannabis resin production

6. Unlike illicit crops such as coca bush and opium poppy, the cannabis plant lends itself to diverse cultivation methods and so grows in a variety of environments. This makes assessing the extent of its cultivation and production difficult. Reports of cannabis cultivation and eradication show that a wide range of practices exist globally. Cannabis cultivation reports range from accounts of individuals growing a small number of plants for personal consumption to reports about large-scale commercial operations in indoor warehouses, on farmland and within forests.

7. Seizure data suggest that the cultivation of cannabis herb continues to occur in most countries worldwide and in all regions of the world. In contrast, the large-scale production of cannabis resin remains confined to a few countries in North Africa and South-West Asia, the most prominent of which are Afghanistan and Morocco.

8. Morocco reported eradicating 5,000 ha of cannabis in 2013 and estimated that, after eradication, 42,000 ha remained under cannabis cultivation. This represents a reduction of almost 70 per cent compared with 2003 levels (134,000 ha).² Morocco reported a stable trend with regard to the area under illicit cannabis cultivation in 2013

¹ United Nations publication, Sales No. E.16.XI.7.

² United Nations Office on Drugs and Crime and Government of Morocco, "Maroc: enquête sur le cannabis 2003" (December 2003).

and a decrease in the production of cannabis resin, which amounted to 700 tons (down from 3,040 tons in 2003).

9. Afghanistan, despite having a significantly smaller estimated area under cannabis cultivation than Morocco (10,000 ha in 2012), had a potential cannabis resin production estimated at 1,400 tons, almost double the estimated production in Morocco. In 2015, cannabis cultivation in Afghanistan remained linked to opium poppy cultivation, with 29 per cent of poppy-growing villages also reporting cannabis cultivation, compared with 20 per cent of non-poppy-growing villages. Both opium poppy and cannabis cultivation in Afghanistan are concentrated in the southern part of the country, where 73 per cent of the villages take part in cannabis cultivation.³

B. Opium poppy cultivation

10. At the time of writing, information for 2016 was available only for Afghanistan. Afghanistan and Myanmar continued to account for the majority of illicit opium poppy cultivation worldwide. Cultivation in Myanmar remained relatively stable in 2014 and 2015, after increasing steadily between 2006 and 2013, while in 2015, Afghanistan saw the first decrease in opium poppy cultivation since 2009. Global opium poppy cultivation decreased by about 10 per cent in 2015, owing mainly to a decrease in Afghanistan. However, the decline in Afghanistan was only temporary, since opium poppy cultivation in the country bounced back in 2016, increasing by 10 per cent with respect to 2015 (see figure I).

11. In 2015, opium poppy cultivation in Afghanistan decreased to 183,000 ha after reaching a record level of 224,000 ha in 2014.⁴ The vast majority of opium poppy (90 per cent) was cultivated in the southern and western regions of the country, where significant decreases were recorded. In 2016, cultivation in the country increased again, reaching 201,000 ha.⁵ Sharp increases were recorded in the eastern and northern regions of Afghanistan, which together represented 13 per cent of total cultivation in the country, up from 8 per cent in 2015. The number of poppy-free provinces decreased in both 2015 and 2016.

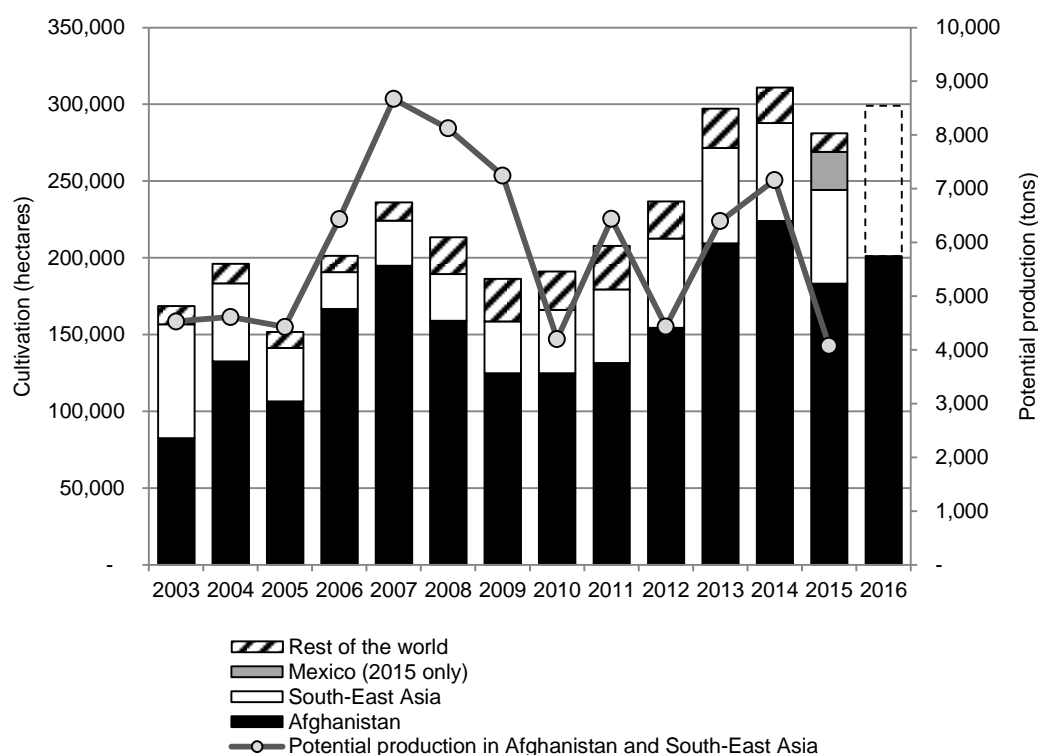
12. In 2015, potential opium production in Afghanistan reached 3,300 tons, the lowest level since 2001. This decline was due not only to a decrease in the area under cultivation, but also to a sharp drop in the yield caused by adverse weather conditions. The yield went from 28.7 kg per ha in 2014 to 18.3 kg per ha in 2015, the lowest level on record. In 2016, potential opium production rose again, reaching 4,800 tons, an increase of 43 per cent with respect to 2015. This rise was the result of the aforementioned increase in cultivation and a higher yield, namely 23.8 kg per ha. Despite the increase in potential opium production, the yield recorded in 2016 was still the third lowest value on record in Afghanistan.

³ UNODC and Ministry of Counter Narcotics of Afghanistan, *Afghanistan Opium Survey 2015* (Vienna, December 2016).

⁴ *Afghanistan Opium Survey 2015*.

⁵ Ibid., "Afghanistan opium survey 2016: executive summary" (Vienna, October 2016).

Figure I
Opium poppy cultivation by region and potential opium production in Afghanistan and South-East Asia (2003-2016)^a



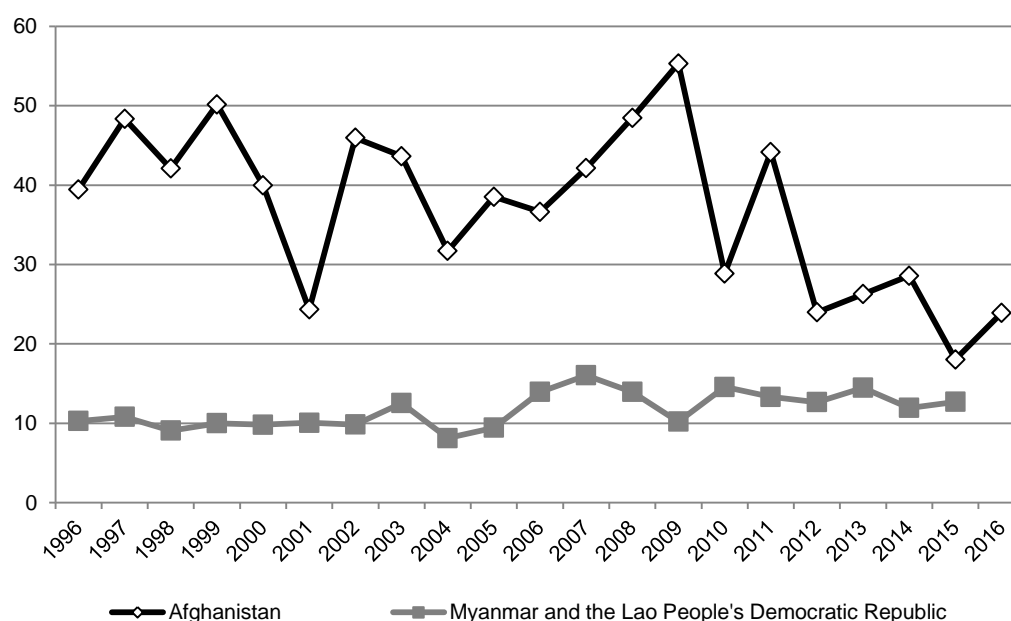
^a At the time of preparation of the present report, cultivation figures for 2016 were available only for Afghanistan.

13. According to estimates in the *South-East Asia Opium Survey 2015*, illicit opium poppy cultivation in the region covered 61,200 ha. After steadily increasing from 21,600 ha in 2006 to 57,800 ha in 2013, opium poppy cultivation in Myanmar has decreased slightly, reaching 55,500 ha in 2015. In the Lao People's Democratic Republic, cultivation steadily increased from 1,500 ha in 2007 to 6,800 ha in 2012. In 2015, estimated cultivation in the Lao People's Democratic Republic reached 5,700 ha.

14. Because of the geographical environment in which opium is cultivated in South-East Asia, on hills with poor soil and no irrigation, the yield in that region traditionally used to be notably lower than in Afghanistan. However, since 2009 the yield in Afghanistan has declined considerably and in 2015 was similar to that observed in South-East Asia (see figure II). Overall, Myanmar and the Lao People's Democratic Republic produced an estimated total of between 731 and 823 tons of opium in 2015, a value similar to that of 2014, when production reached 762 tons.

15. In 2015, almost 87 per cent of global opium poppy cultivation occurred in Afghanistan and South-East Asia. According to the first opium survey for Mexico, carried out by UNODC and the Government of Mexico for the period July 2014-June 2015, the area under cultivation was estimated at 24,800 ha, which represented about 9 per cent of global cultivation. During 2015, the authorities of Mexico reported the eradication of 25,960 ha of opium poppy, a 21 per cent increase with respect to 2014 (21,445 ha) and of 77 per cent with respect to 2013 (14,662 ha).

Figure II
Yield of opium poppy cultivation in Afghanistan and South-East Asia (1996-2016)^a
 (Kilograms per hectare)



^a Figures for Myanmar and the Lao People's Democratic Republic for 1997 and 1999 reflect only the yield in Myanmar.

16. The remaining 4 per cent of global illicit opium cultivation is estimated to occur in various countries across the globe. In its 2015 coca cultivation survey, Colombia reported the eradication of 613 ha in 2015 (813 ha in 2014 and 514 ha in 2013). It also reported the dismantling of one heroin laboratory every year from 2011 to 2015. The area under opium poppy cultivation in Colombia has declined every year between 2000 and 2013, from over 6,000 ha to less than 300 ha. In 2015, the area under cultivation in the country was estimated at 595 ha in 2015, a 54 per cent increase with respect to 2014 (387 ha), and potential heroin production reached 2.1 tons.

C. Coca cultivation

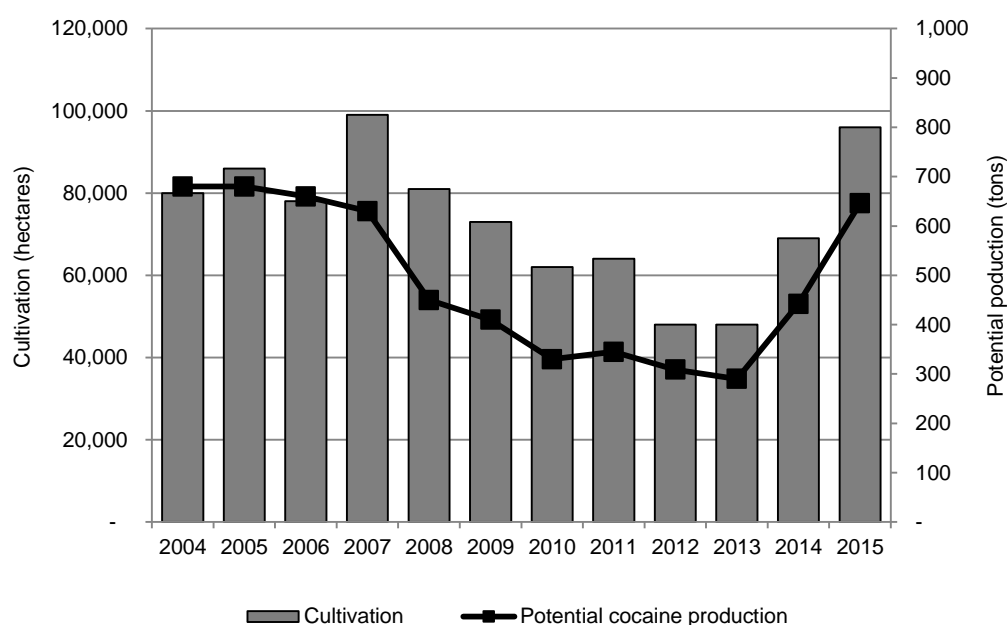
17. Bolivia (Plurinational State of), Colombia and Peru continued to account for virtually all cultivation of coca bush worldwide. The total area under cultivation in the three countries increased by 18 per cent, from 132,500 ha in 2014 to 156,500 ha in 2015, the most significant increase on record since the 1980s. This was due mainly to a sharp increase of almost 40 per cent in Colombia (see figure IV).

18. After reaching historically low levels (48,000 ha) in 2013, coca bush cultivation in Colombia doubled in two years, reaching 96,000 ha in 2015, as shown in the 2015 coca cultivation survey conducted jointly by the Government of Colombia and UNODC. It was the highest value since 2007. About 87 per cent of coca cultivation occurred in areas that were already affected in 2014, with the most significant increases taking place in the three main producing departments: Nariño, Putumayo and Norte de Santander. This confirms the trend observed in 2014, namely that coca cultivation does not enter new communities, and that communities that were already cultivating coca have found incentives to expand their cultivation areas.

19. Potential cocaine production in Colombia increased sharply to 646 tons in 2015. In 2013 it had reached 290 metric tons, the lowest value since the mid-1990s (see figure III). While it is estimated that 36 per cent of farmers process the coca leaves themselves in order to obtain cocaine base paste, intelligence information indicates that some of the paste does not undergo full processing into cocaine in the country, but instead is trafficked into other countries to be processed there.⁶ During 2015, the Colombian authorities destroyed 3,591 laboratories for the extraction of coca paste or cocaine base and 236 cocaine hydrochloride laboratories, an increase of 64 per cent and 45 per cent, respectively, in relation to 2014.

Figure III

Coca bush cultivation and potential cocaine production in Colombia (2004-2015)



20. According to the 2015 national coca monitoring survey in the Plurinational State of Bolivia, the cultivation of coca bush remained stable at 20,200 ha in 2015, the lowest level recorded since 2001. Satellite images and ground surveys showed levels similar to those of 2014 in the two main areas of cultivation, Yungas de La Paz and Trópico de Cochabamba, which together accounted for 99 per cent of the area under coca bush cultivation in the country. The production of dried coca leaf in the Plurinational State of Bolivia in 2015 was estimated at 32,500 tons, the lowest value on record since 2005.

21. The manual eradication of coca bush in the Plurinational State of Bolivia remained stable in 2015 for the fourth consecutive year, reaching 11,020 ha. The number of cocaine hydrochloride laboratories destroyed by the authorities has increased notably from 7 laboratories in 2008 to 74 laboratories in 2014 and 73 laboratories in 2015.

22. According to the 2015 national coca monitoring survey conducted by UNODC and the Government of Peru, the area under coca bush cultivation in Peru at the end of 2015 stood at 40,300 ha, a decrease of 6 per cent compared with 2014 (42,900 ha), and the lowest level recorded since 1999. The production of dried coca leaf in Peru was

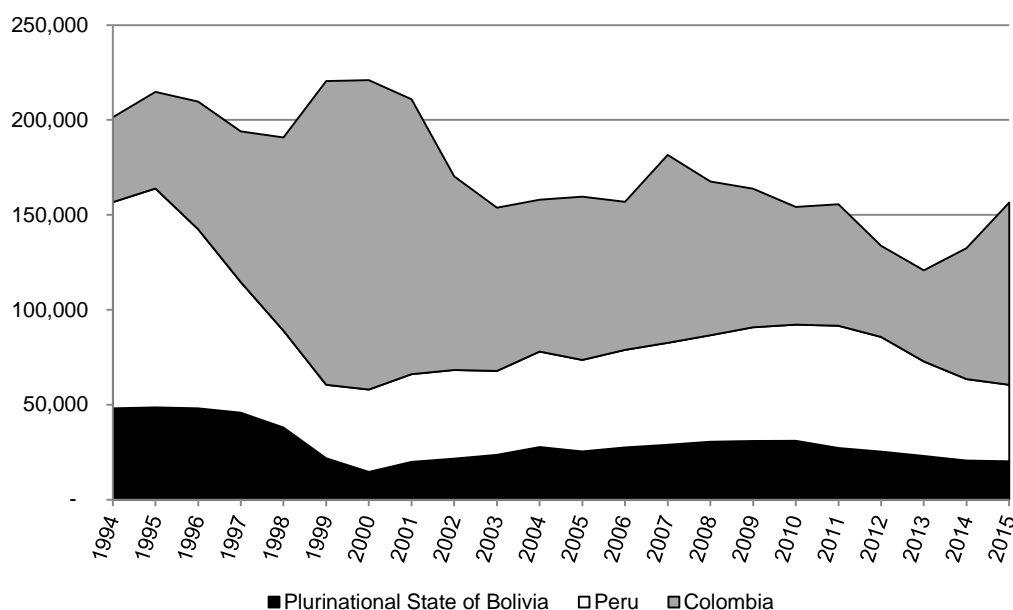
⁶ Country report submitted by Colombia to the Twenty-sixth Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean, held in Santiago from 3 to 7 October 2016.

estimated at 96,300 tons in 2015, of which 9,000 tons were destined for traditional consumption.

23. Planned eradication by the Peruvian authorities has been the main factor behind the reduction. In 2015, the reduction was concentrated in several areas including Bajo Amazonas and Alto Huallaga. Eradication in 2015 increased by more than 15 per cent compared with 2014, reaching a record 35,900 ha. The authorities reported that their eradication efforts had caused drug trafficking organizations to shift illicit cultivation to increasingly scattered and isolated areas in recent years.⁷

Figure IV

Coca bush cultivation in Bolivia (Plurinational State of), Colombia and Peru (1994-2015)
(Hectares)



24. Although the manufacture of cocaine occurs mainly in Bolivia (Plurinational State of), Colombia and Peru, clandestine laboratories processing coca leaf derivatives also exist outside those countries. According to data from responses to the annual report questionnaire for 2015, several countries in South America, including Argentina, Chile, Ecuador and Honduras, reported the detection of clandestine laboratories processing coca leaf derivatives. In 2015, Greece, Portugal, Spain, and Hong Kong, China, also reported the detection of such laboratories.

III. Global trends in illicit drug trafficking and seizures

25. The table below shows the quantities of the major drug types seized globally and reported to UNODC in 2013, 2014 and 2015, and the estimated trend for 2015.

⁷ Country report submitted by Peru to the Twenty-sixth Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean.

Table
Global drug seizures and trends, 2013, 2014 and 2015

Drug type	2013 seizures (tons)	2014 seizures (tons)	2015 seizures (tons)	2015 trend ^{a,b}
Cannabis herb	5 621.5	5 877.2	5 596.0	Stable (-3%)
Cannabis resin	1 411.1	1 440.3	1 505.6	Stable (+5%)
Opium	634.3	526.5	586.0	Increase (+11%)
Heroin	77.6	81.7	78.8	Stable (-2%)
Illicit morphine	38.4	20.9	9.4	Decrease (-54%)
Cocaine ^c	655.2	655.0	845.3	Increase (+31%)
Methamphetamine	89.2	108.2	123.7	Increase (+14%)
Amphetamine	40.4	46.4	39.1	..
“Ecstasy”-type substances	4.2	9.4	5.4	Decrease (-34%)

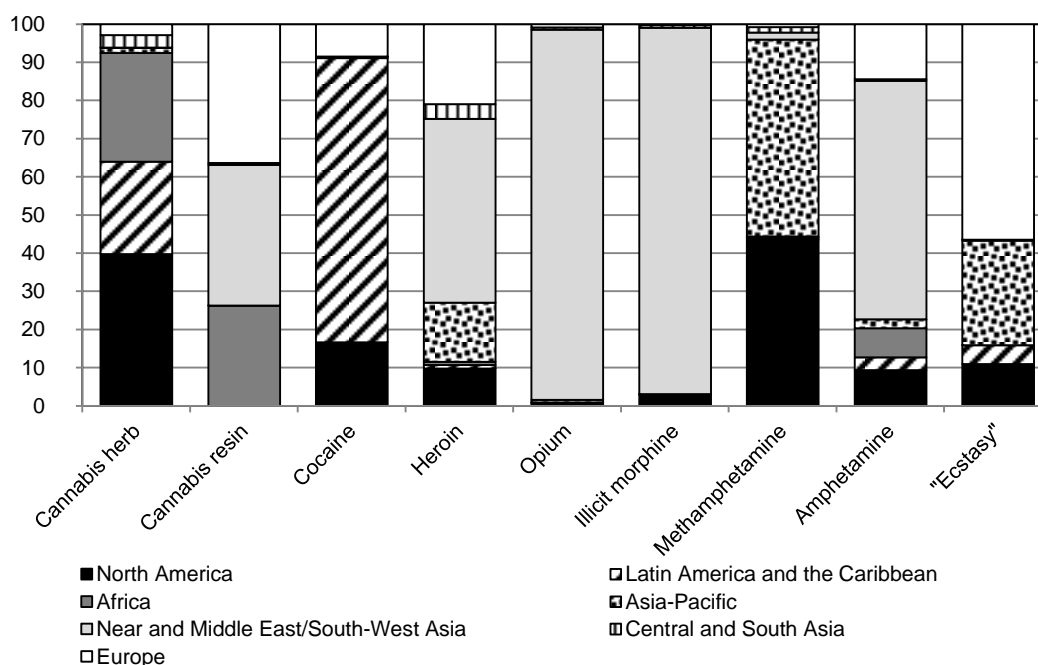
^a Since data for 2015 were incomplete at the time of preparation of the present report, the trend was estimated by comparing total seized quantities for countries and territories for which data were available for both 2014 and 2015. Totals for 2015 are preliminary.

^b The term “stable” refers to an annual variation of less than 10 per cent.

^c Includes base, pastes, salts and “crack” cocaine.

26. The estimated annual trend in global drug seizures for 2015 is based on the quantities of narcotic drugs seized by Member States and reported to UNODC by the time of analysis.

Figure V
Geographical distribution of seizures, by drug type (2015)^a
(Percentage)



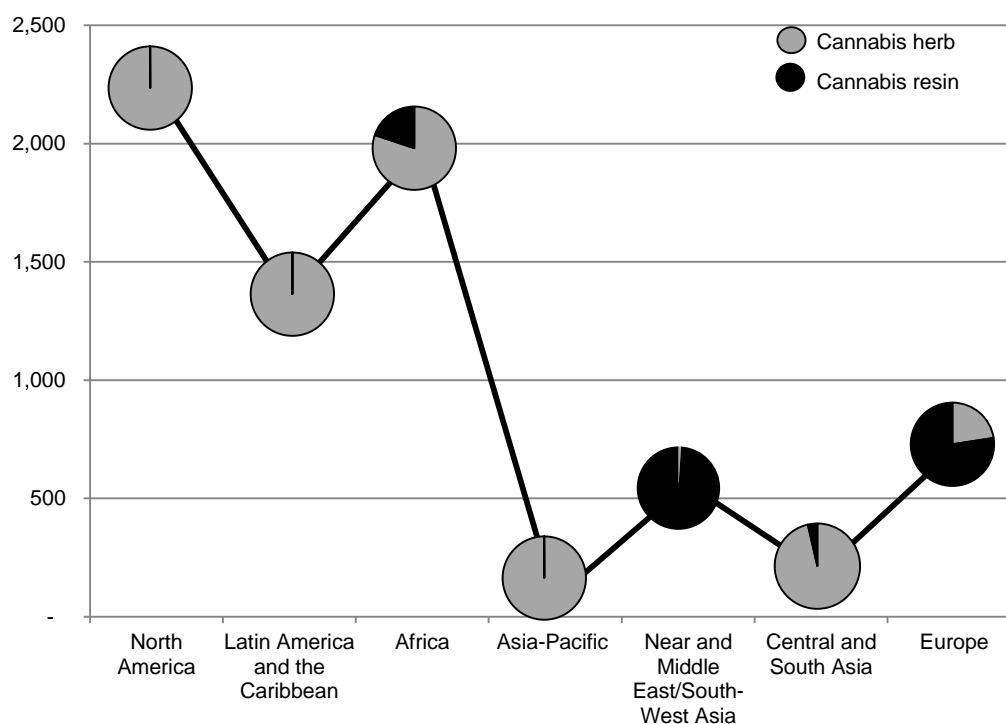
^a Because the available information for 2015 was incomplete at the time of writing the present report, the geographical distribution for amphetamine seizures is based on data for 2014.

A. Cannabis

27. Most cannabis is seized in the Americas, where cannabis is trafficked almost exclusively in its herbal form. Significant amounts of both cannabis herb and resin were seized in several regions, including Europe and Africa. In Africa, most of the cannabis resin is found in North Africa, while in sub-Saharan Africa cannabis is trafficked almost exclusively in its herbal form. In Europe, despite an increase in the trafficking of herbal cannabis in recent years, cannabis resin continues to account for the majority of cannabis seized. While cannabis trafficking does not significantly affect the Asia-Pacific region,⁸ large amounts of cannabis are trafficked in the Near and Middle East and South-West Asia, almost exclusively in its resin form (see figure VI).

Figure VI

Global cannabis seizures, by region (2015)^a
(Tons)



^a Data are preliminary.

Cannabis herb

28. Even though cannabis herb seizures occur in almost every corner of the globe, the Americas have been responsible for more than 60 per cent of the amount seized globally every year since the early 1990s. While North America has traditionally accounted for most of that amount, there has been a shift towards Latin America and the Caribbean, especially since 2011 (see figure VII). In 2015, the amount of cannabis herb seized remained stable at the global level, with changes in regional trends in North America, Latin America and the Caribbean, and Western and Central Europe.

⁸ "Asia-Pacific" refers to the regions of East and South-East Asia and Oceania together.

29. As seen in figure VII, cannabis herb seizures in North America have been decreasing sharply since 2010. Preliminary data for 2015 indicate that seizures in the region remained stable, mainly because of the first increase in Mexico in five years, which offset a 22 per cent decrease in the United States of America with respect to 2014. As a result, Mexico reported the highest amounts of cannabis herb seized by a single country in 2015 (1,242 tons), surpassing the United States (970 tons) for the first time since 2007. United States authorities reported that the decreasing trend observed since 2010 may be related to changing law enforcement priorities in those states where cannabis herb has been legalized.⁹

30. Unlike in North America, cannabis herb seizures in Latin America and the Caribbean increased sharply between 2009 and 2014, from 650 tons to over 2,000 tons. Preliminary data for 2015 suggest that cannabis herb seizures in the region decreased to under 1,400 tons, owing mostly to a sharp decrease in the Caribbean, where record levels were observed in 2014. Cannabis herb seizures in South America also decreased, from a record 1,427 tons in 2014 to close to 1,300 tons in 2015, according to preliminary data. In Paraguay, after reaching an unprecedented 711 tons in 2014, seizures decreased to 510 tons, the second highest level on record. Paraguayan authorities reported that cannabis herb continued to be produced and trafficked to neighbouring countries and Chile. They underlined the need to quantify and monitor areas of cultivation in order to take more effective action.¹⁰ Argentina reported a record amount of 207 tons of cannabis herb seized in 2015.

31. Between 2009 and 2014, cannabis herb seizures in Western and Central Europe nearly doubled, from 65 to 125 tons. This had occurred partly because domestically produced herbal cannabis products had become more prevalent in recent years, displacing imported resin in many countries.¹¹ In 2015, however, cannabis herb seizures in the region decreased sharply to 71 tons, owing mainly to sharp reductions in Belgium (764 kg seized, down from 10,744 kg in 2014) and Greece (2.5 tons, down from 19.6 tons). The production of and trafficking in cannabis herb is an area of growing concern for law enforcement in Europe because of the increasing involvement of organized crime in the region.¹² In Turkey, cannabis herb seizures decreased sharply from 180 tons in 2013 to 46 tons in 2015.

32. In 2015, global cannabis herb seizures remained stable, mainly due to a sharp increase in seizures reported in Africa that offset the decline in the Americas (see figure VII). Information on cannabis herb seizures in the region is limited; at the time of writing, eight African countries had reported cannabis herb seizures in their annual report questionnaires for 2015. Nevertheless certain countries with high levels of reported seizures have consistently responded to part IV of the annual report questionnaires, and all have shown increasing trends in recent years. Annual cannabis herb seizures have increased notably in Egypt, from an average of 80 tons between 2003 and 2012 to 396 tons in 2014 and 360 tons in 2015. Seizures in Morocco reached 313 tons in 2015, the highest level since 2004. In Nigeria, cannabis herb seizures oscillated between 100 tons and 350 tons during the period 2005-2014, and reached a record 871 tons in 2015, the highest level reported by a single country that year outside North America.

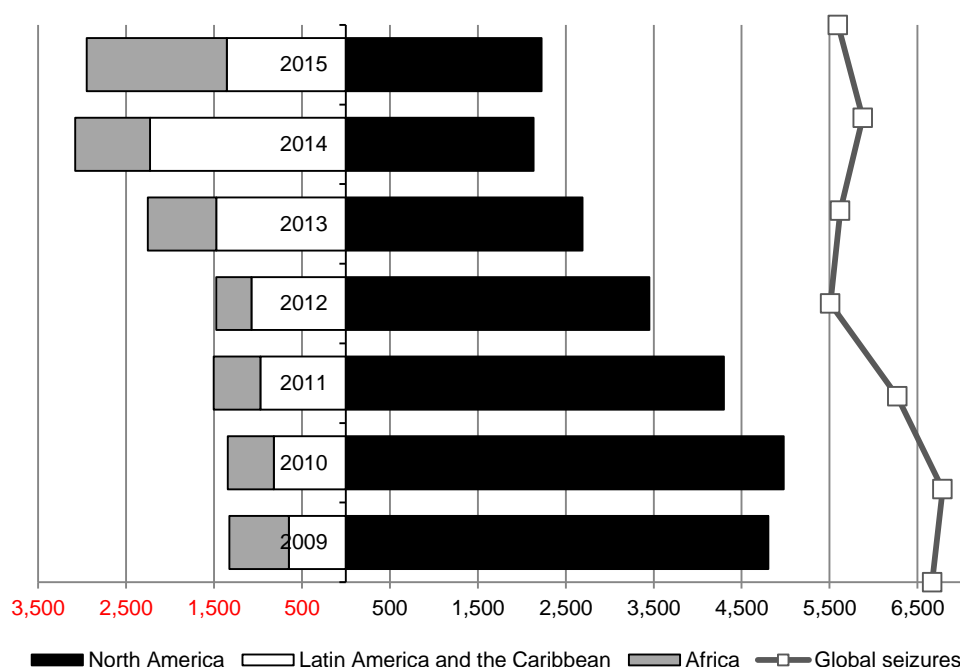
⁹ Response submitted by the United States to the annual report questionnaire for 2015.

¹⁰ Country report submitted by Paraguay to the Twenty-sixth Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean.

¹¹ European Monitoring Centre for Drugs and Drug Addiction and European Police Office, *EU Drug Markets Report: Strategic Overview* (Luxembourg, Publications Office of the European Union, 2016).

¹² European Monitoring Centre for Drugs and Drug Addiction, *European Drug Report: Trends and Developments 2015* (Luxembourg, Publications Office of the European Union, 2015).

Figure VII
Cannabis herb seizures by region and globally (2009-2015)^a
 (Tons)



^a Data for 2015 are preliminary.

33. In Asia, cannabis herb trafficking has traditionally been most prominent in South Asia, with India and Bangladesh reporting 94 tons and 42 tons seized, respectively, in 2015. In Central Asia, seizures have been concentrated mostly in Kazakhstan, where a record 34 tons of cannabis herb were seized in 2015. Although in East and South-East Asia cannabis herb is not as prevalent as other drugs, Indonesia and Thailand consistently report significant amounts seized (29 tons and 25 tons, respectively, in 2015).

Cannabis resin

34. In contrast with the cultivation of cannabis herb, the production of cannabis resin is concentrated in a small number of countries, the most prominent of which are Afghanistan and Morocco. Consequently, seizures for cannabis resin are concentrated in and around those two source countries. Seizures are also concentrated in North Africa, South-West Asia, and the main consumer market, Western and Central Europe. While 10 years ago cannabis resin seizures were concentrated mainly in Western and Central Europe, seizures have been more evenly distributed across those three regions in recent years (see figure VIII).

35. As the main entry point for cannabis resin from Morocco into Western Europe, Spain continued to be the country with the highest amount seized in the world, surpassing 380 tons in 2015, virtually the same as in 2014. Over 50 per cent of that amount was seized in Cádiz owing to its strategic position with respect to Africa.¹³ Other Western European countries reporting large amounts of cannabis resin seized during 2015 were Italy (67 tons, down from 113 tons in 2014) and France (60 tons, up from 37 tons in 2014). Most of that resin originated in Morocco. In Turkey, cannabis

¹³ Country report submitted by Spain to the Twenty-sixth Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean.

resin seizures decreased sharply in recent years, from an unprecedented 94 tons in 2013, to 7.8 tons in 2015, the lowest level since 2007.

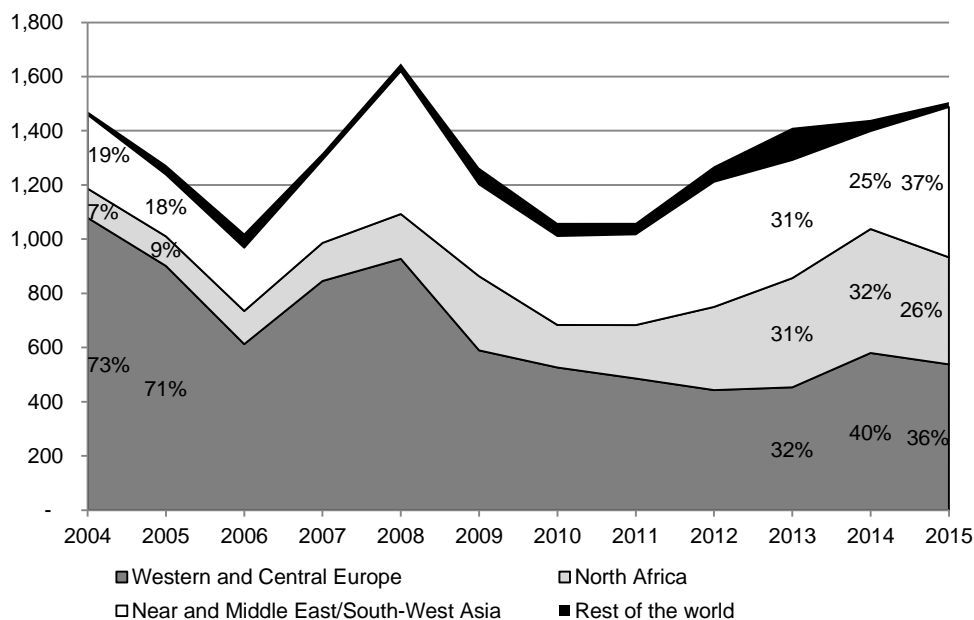
36. In 2015, cannabis resin seizures in North Africa decreased for the first time since 2009, reaching 395 tons, 14 per cent less than the previous year. Algeria and Egypt reported decreases of 30 per cent and 39 per cent, respectively, in comparison with 2014, while a record amount of almost 235 tons of cannabis resin was reported seized in Morocco. Despite the sharp decreases in Algeria and Egypt in 2014 and 2015, a markedly rising trend in cannabis resin seizures was reported by both countries over the past 10 years, with seizures increasing from less than 2 tons in 2005 in both countries to over 126 tons in Algeria and 33 tons in Egypt in 2015. While cannabis resin is mostly smuggled into Egypt over land from Morocco, there is also evidence of smuggling attempts from South-West Asia by land (through Jordan) and by sea (from Pakistan and Afghanistan).¹⁴

37. Cannabis resin seizures in the Near and Middle East and South-West Asia are concentrated in Afghanistan and two neighbouring countries, the Islamic Republic of Iran and Pakistan. Seizures in all three countries increased sharply in 2015. Over the previous 10 years, seizures in the Islamic Republic of Iran had followed a relatively stable trend. However, in 2015 cannabis resin seizures in the country reached a record 98 tons, a 26 per cent increase with respect to 2014. About 90 per cent of cannabis resin seized in the Islamic Republic of Iran in 2015 had entered the country from Pakistan.¹⁵ In Pakistan cannabis resin seizures had decreased in 2014, but increased again in 2015, to 280 tons, the second-highest value since 2000. Cannabis resin seizures in Afghanistan reached unprecedented levels at 163 tons, almost double the previous record of 84 tons in 2007.

Figure VIII

Global cannabis resin seizures, by region (2004-2015)^a

(Tons)



^a Data for 2015 are preliminary.

¹⁴ Country report submitted by Egypt to the Twenty-sixth Meeting of Heads of National Drug Law Enforcement Agencies, Africa, held in Addis Ababa from 19 to 23 September 2016.

¹⁵ Response submitted by the Islamic Republic of Iran to the annual report questionnaire for 2015.

B. Opiates

Opium and illicit morphine

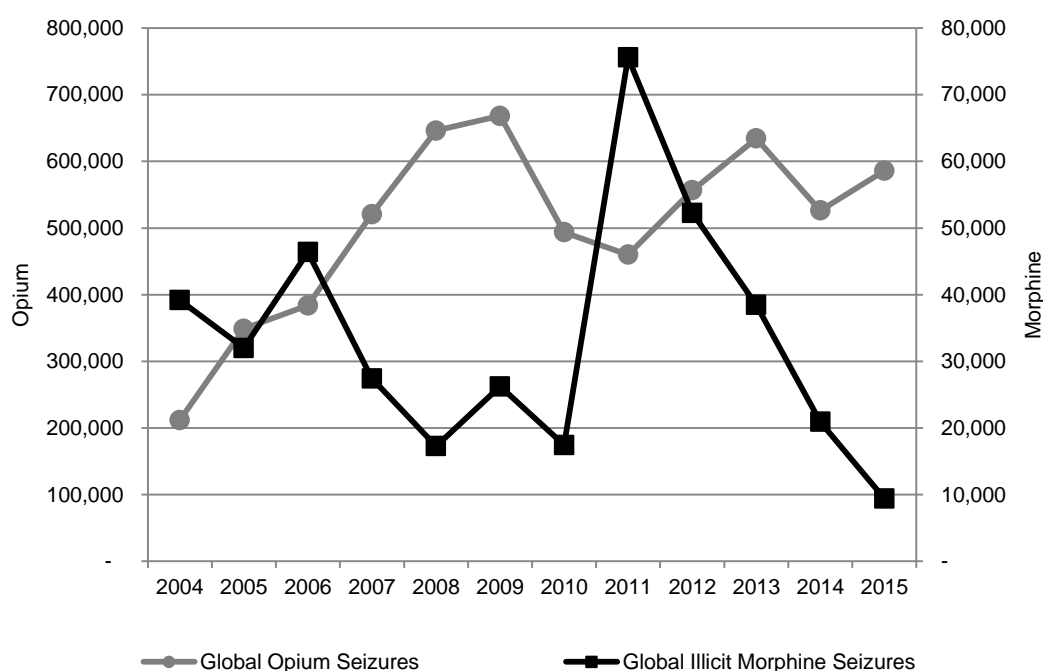
38. The Near and Middle East and South-West Asia traditionally represent between 95 and 100 per cent of the global amounts of opium and illicit morphine seized. Significant seizures in the region occur almost exclusively in Afghanistan and two neighbouring countries, the Islamic Republic of Iran and Pakistan.

39. After decreasing in 2014, global opium seizures increased by 10 per cent in 2015, reaching 586 tons. Opium seizures in Afghanistan have been declining sharply in recent years, from a record 124 tons in 2012 to 30 tons in 2015, the lowest level since 2004. However, sharp increases in the Islamic Republic of Iran and Pakistan have offset this decrease. A record 57 tons were seized in Pakistan in 2015, while with 479 tons, seizures in the Islamic Republic of Iran reached their highest level since 2009.

40. In 2015, Afghanistan, Iran (Islamic Republic of) and Pakistan represented 97 per cent of the global amount of opium seized. Other countries with significant seizures were France (4,040 kg), China (2,452 kg), India (1,687 kg), United States (2,155 kg), Mexico (1,306 kg) and Myanmar (1,047 kg).

Figure IX

Global opium and illicit morphine seizures (2004-2015) (Kilograms)



41. Global illicit morphine seizures have been decreasing sharply since reaching a record 75 tons in 2011 (see figure IX). In 2015, global seizures of illicit morphine amounted to just over 9 tons, a 56 per cent decrease with respect to 2014 and the lowest level on record since the early 1990s.

42. Illicit morphine seizures in Afghanistan, since peaking at 64,028 kg in 2011, dropped to only 18 kg in 2015, similar to what has happened with opium in recent years. Seizures in Pakistan have also been declining sharply over the last 10 years, reaching 762 kg in 2015, the lowest level on record since 2000. In the Islamic

Republic of Iran, illicit morphine seizures reached 8.3 tons in 2015, a 35 per cent decline with respect to 2014.

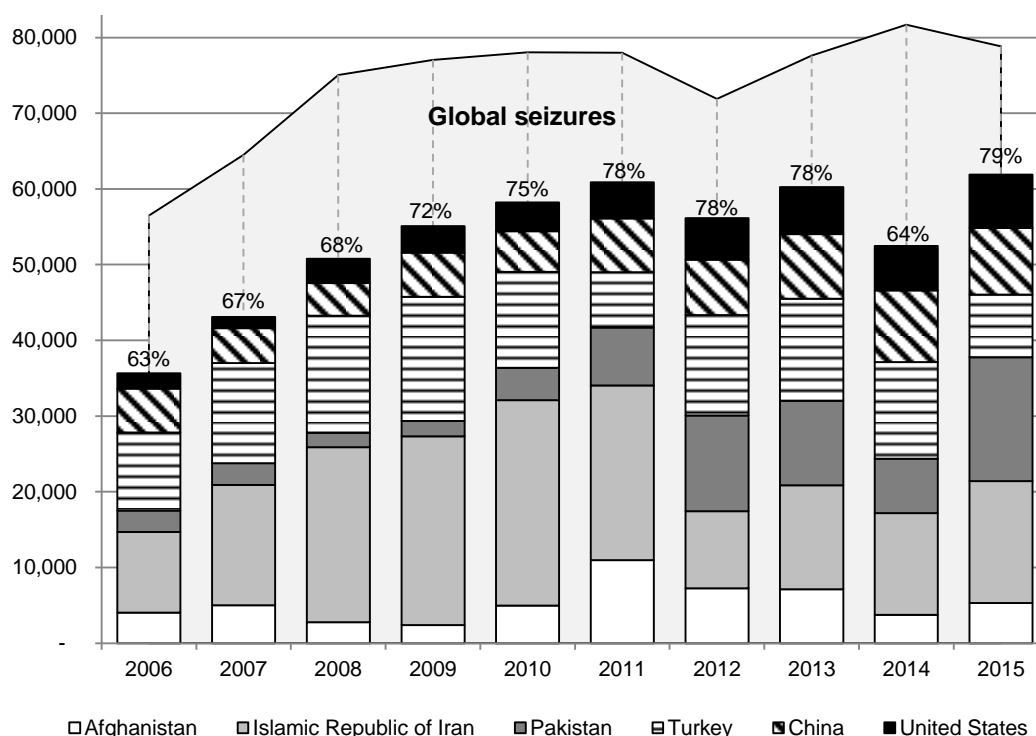
Heroin

43. Compared with seizures of opium and illicit morphine, heroin seizures occur in a much wider range of countries (see figure V), in particular around the larger markets in North America, Europe and Asia-Pacific. By and large, each of these three markets is supplied by a different producing region. While East and South-East Asia are supplied with heroin produced, in the main, in Myanmar and the Lao People's Democratic Republic, most of Europe is supplied with Afghan heroin, which is trafficked through the "Balkan route" and the "southern route" through the Islamic Republic of Iran, Pakistan and, increasingly, countries in Africa.¹⁶ The "northern route" continues to link heroin from Afghanistan to markets in the Russian Federation.¹⁷ In North America, the United States are mostly supplied with heroin produced in Latin America.

44. At the global level, heroin seizures have remained at high but relatively stable levels since 2008. Afghanistan, China, Iran (Islamic Republic of), Pakistan, Turkey and the United States are the six countries with the highest annual amounts of heroin seized in recent years, consistently accounting for between 60 and 80 per cent of global amounts seized since 2006 (see figure X). Hence, global trends are heavily influenced by what occurs in those countries.

Figure X

Heroin seizures in selected countries and worldwide (2006-2015)^a
(Kilograms)



^a Data for 2015 are preliminary.

¹⁶ UNODC, *Afghan Opiate Trafficking through the Southern Route* (Vienna, 2015).

¹⁷ UNODC, *The Illicit Drug Trade through South-Eastern Europe* (Vienna, 2014).

45. In the Asia-Pacific region, heroin seizures are concentrated in China, where the amount of heroin seized increased from 4.6 tons in 2007 to over 9.4 tons in 2014. In 2015, seizures in China declined slightly to 8.8 tons. According to Chinese authorities, almost 94 per cent of the heroin seized during the first nine months of 2015 originated in the Golden Triangle, while about 2 per cent had been produced in the Golden Crescent.¹⁸ Despite remaining stable at around 12 tons in 2015, heroin seizures in the Asia-Pacific region have followed an increasing trend over the last decade (see figure XI). Seizures in Viet Nam and Myanmar have increased almost tenfold since 2007, reaching 1,510 kg and 725 kg, respectively, in 2015. In Thailand, heroin seizures have decreased from 750 kg in 2013, to 237 kg in 2015. Other Member States in the region that seized significant amounts in recent years were Australia (823 kg in 2015) and Malaysia (456 kg in 2014).

46. The route most used for trafficking Afghan heroin into the European market continues to be the “Balkan route”, with high levels of heroin seized in the Golden Crescent and Turkey. In 2015, heroin seizures increased sharply in Afghanistan, Iran (Islamic Republic of) and Pakistan, reaching 5.3 tons, 16.1 tons and 16.3 tons, respectively, or increases with respect to 2014 of 41 per cent in Afghanistan, 20 per cent in Iran (Islamic Republic of) and 138 per cent in Pakistan. In Turkey, heroin seizures decreased by 35 per cent in 2015, to 8.3 tons, the lowest level since 2011.

47. Despite a spike in 2014 due to one multi-ton seizure in Greece, heroin seizures in Western and Central Europe have been following a decreasing trend, from 11.6 tons in 2000 to 4.3 tons in 2015, the lowest level on record since the late 1980s. In 2013 and 2014, the number of large individual seizures, i.e. seizures of over 100 kg, has increased notably in the European Union, and a number of Member States have recorded their largest ever seizures during the same period, showing a change in the modus operandi of traffickers in recent years.¹⁹ Additionally, a new study suggests that networks operating between Pakistan and Europe have become dominant in recent years and are targeting Belgium, the Netherlands and the United Kingdom of Great Britain and Northern Ireland in order to supply them with heroin trafficked via the “southern route”.²⁰

48. In the Americas, heroin seizures more than doubled between 2007 and 2010, and remained stable afterwards (see figure XI). In 2015, heroin seizures in the region reached record levels, owing mostly to an unprecedented 7 tons seized by the United States. United States authorities reported that the majority of the heroin available in the country was produced in Mexico and Colombia.²¹ Heroin seizures in both Mexico and Colombia increased in 2015 with respect to 2014, reaching 546 kg and 393 kg, respectively. The Mexican authorities reported that most of the heroin that entered Mexico was of Guatemalan or Colombian origin, and destined for the United States and Europe.²²

¹⁸ Country report submitted by China to the Fortieth Meeting of Heads of National Drug Law Enforcement Agencies, Asia and the Pacific, held in Colombo from 24 to 27 October 2016.

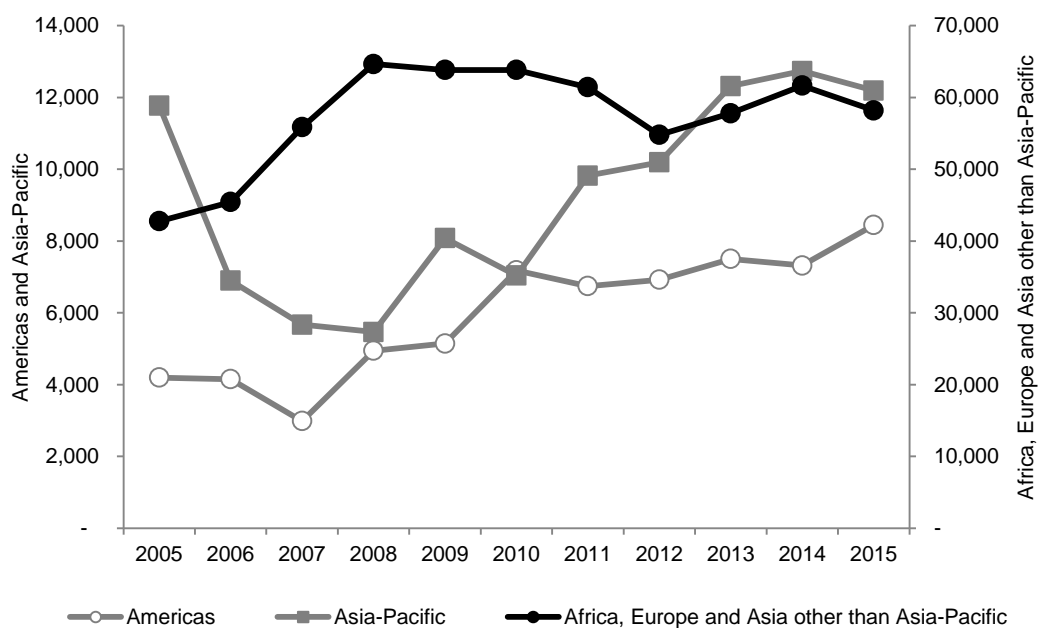
¹⁹ *EU Drug Markets Report*.

²⁰ *Afghan Opiate Trafficking*.

²¹ Response submitted by the United States to the annual report questionnaire for 2015.

²² Country report submitted by Mexico to the Twenty-sixth Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean.

Figure XI
Heroin seizures, by region (2005-2015)
 (Kilograms)



49. Various regions in Africa are taking on significant roles in the transit of heroin via the “southern route”, with criminal networks on the continent taking control over trafficking routes.²³ In Egypt, record heroin seizures were reported in recent years: 613 kg in 2014 and 516 kg in 2015. Authorities in Mozambique reported that the country was being used as a transit point for heroin from Pakistan into the United Republic of Tanzania, which may be a result of measures taken by the United Republic of Tanzania and Kenya that were forcing traffickers to move south.²⁴

50. While heroin continues to be trafficked to Central Asia and the Russian Federation via the “northern route”, insufficient information was available at the time of writing to determine the trend in seizures along the “northern route” during 2015. However, in 2015 significant heroin seizures continued to be reported in a number of countries, including Kazakhstan (464 kg) and Kyrgyzstan (344 kg).

51. The source of heroin in Oceania has alternately been Afghanistan and South-East Asia, with South-East Asia predominating in recent years. In South Asia, the main destination for heroin from Afghanistan appears to be India.²⁵ Between 2013 and 2015, annual heroin seizures in India remained around the 1.4 ton mark, the highest levels on record since 1995.

C. Cocaine

52. The main consumer markets for cocaine in the world, North America and Western and Central Europe, continue to be supplied by cocaine originating in South America. For that reason global cocaine seizures are concentrated in those regions as well as in transit regions such as Central America and the Caribbean (see figure V).

²³ *Afghan Opiate Trafficking*.

²⁴ Country report submitted by Mozambique to the Twenty-sixth Meeting of Heads of National Drug Law Enforcement Agencies, Africa.

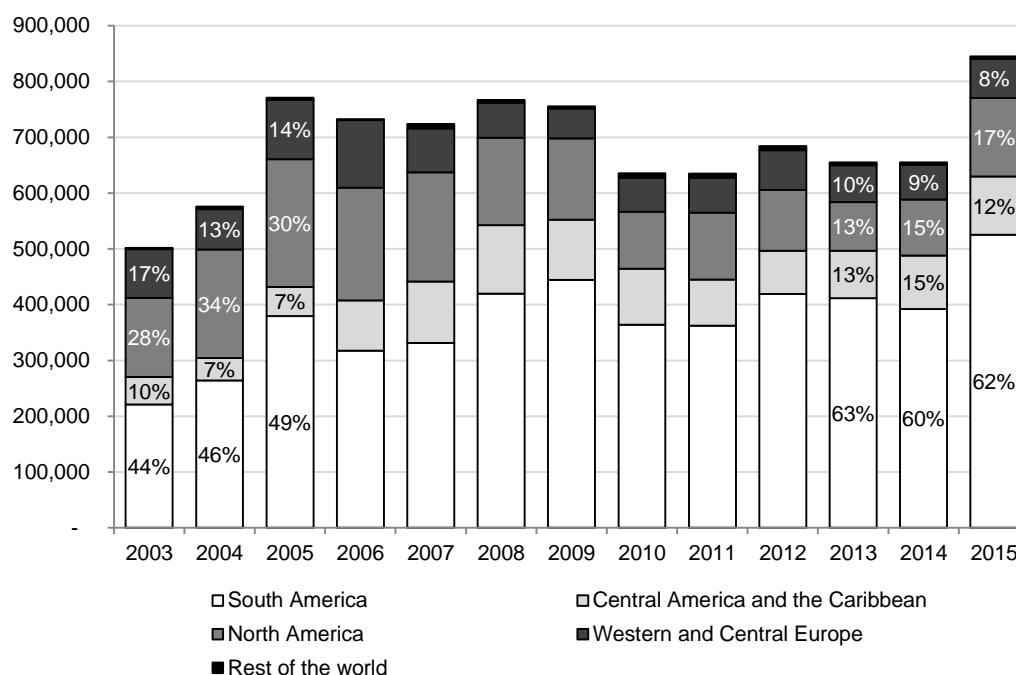
²⁵ *Afghan Opiate Trafficking*.

Available data for 2015 suggest that global cocaine seizures increased sharply in 2015, reaching the highest level on record owing mainly to an increase in South America (see figure XII).

53. In South America cocaine seizures decreased slightly between 2012 and 2014, to 392 tons. However, preliminary data for the region indicate that in 2015, an unprecedented 525 tons of cocaine were seized, a level 18 per cent higher than the previous peak of 444 tons, which was reached in 2009. A record 297 tons of cocaine were seized in Colombia, up from 191 tons in 2014. In the Bolivarian Republic of Venezuela, 65 tons were seized, also a historical high and more than double the annual average of 26 tons reported seized during the previous six years. In Ecuador, cocaine seizures increased for the fifth year in a row, from 15 tons in 2010 to over 65 tons in 2015. Ecuadorian authorities noticed the emergence of new routes into Europe that used West African countries as transit points.²⁶ In 2015, Argentina and Peru recorded sharp decreases in cocaine seizures of 46 per cent and 33 per cent, respectively, while in the Plurinational State of Bolivia and Chile seizures remained stable at 21 tons and 17 tons, respectively.

Figure XII

Global seizures of cocaine (base, paste and salts), by region (2003-2015)^a
(Kilograms)



^a Data for 2015 are preliminary.

54. In 2015, five European countries, Italy, Portugal, Spain, Sweden and Switzerland, listed three countries in Central America and the Caribbean as transit and departure points for cocaine, namely Costa Rica, the Dominican Republic and Panama. At the same time, those three countries recorded the highest cocaine seizures in the region in 2015. Preliminary data for 2015 indicate that cocaine seizures continued to increase in Panama and the Dominican Republic, while in Costa Rica cocaine seizures decreased by 36 per cent after the peak of 2014, reaching 17 tons. In 2015, total cocaine seizures in Central America and the Caribbean increased for the fourth consecutive year, reaching 104 tons.

²⁶ Response submitted by Ecuador to the annual report questionnaire for 2015.

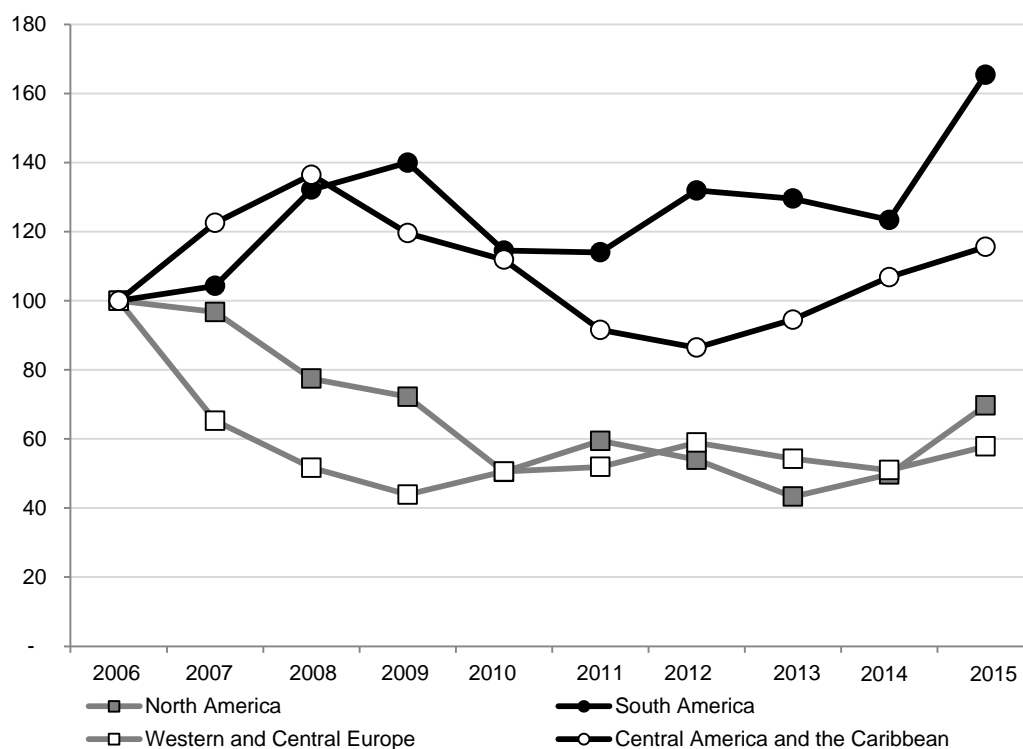
55. The geographical location of global cocaine seizures seems to have been shifting from the main markets to the origin and transit regions. While cocaine seizures in the production and transit regions of South America and of Central America and the Caribbean have increased significantly over the last 10 years, seizures in the main markets of Western and Central Europe and North America decreased markedly over the same period, as seen in figure XIII.

56. After decreasing to 87 tons in 2013, the lowest level reported since the late 1980s, cocaine seizures in North America increased to 100 tons in 2014. Preliminary data suggest that in 2015, cocaine seizures may have increased once again, to 140 tons, with sharp increments in both Mexico and the United States. According to national authorities, the vast majority of cocaine that enters the United States is smuggled by land via the south-western border, with a smaller portion entering by sea from the Caribbean (mostly from the Dominican Republic and Puerto Rico) through Miami and New York.²⁷

Figure XIII

Cocaine seizure trends, by region (2006-2015)

(Index: 2006 = 100)



57. Cocaine seizures in Western and Central Europe peaked in 2006 at 121 tons, then declined and remained at an average of 63 tons between 2008 and 2014, and stood at 62 tons in 2014. In 2015, cocaine seizures in the region increased to 70 tons. This rise was mostly driven by sharp increases in Belgium, France and Portugal, where cocaine seizures reached 17 tons, 11 tons and 6 tons, respectively, up from 9 tons, 7 tons and 3.7 tons, respectively, in 2014. The country with the highest amount of cocaine seized in the region continues to be Spain, where seizures remained stable at 22 tons. In recent years, cocaine smuggling in maritime containers has increased and now appears to be a major threat, given the large and increasing volume of maritime trade going

²⁷ United States Department of Justice, Drug Enforcement Administration, *2016 National Drug Threat Assessment: Summary* (November 2016).

into the region and the fact that major European ports such as Rotterdam, Netherlands, and Antwerp, Belgium, are being targeted by traffickers.²⁸

58. A secondary route for cocaine trafficked across the Atlantic to Europe involved the use of countries in Africa, notably West Africa, as transit points. Countries in West Africa have reported large seizures in recent years, with Nigeria recording over 100 kg every year since 2003, and Ghana seizing a total 1.3 tons during the period 2013-2014. A more recent concern is the use of routes established for other drugs to traffic cocaine, such as cannabis routes in North Africa or heroin routes in East Africa.²⁹ In that respect, Egypt reported a record 532 kg of cocaine seized in 2014 (23 kg in 2015), Morocco reported seizures of 632 kg in 2014 and 129 kg in 2015, and Algeria seized 88 kg of cocaine in 2015, while the United Republic of Tanzania seized an average of 85 kg of cocaine annually between 2010 and 2015, up from 3.7 kg on average over the previous 10 years.

59. In most parts of Eastern Europe, South-Eastern Europe, Asia and Oceania, the availability of cocaine remains limited compared with other types of illicit drugs. However, seizure data show that cocaine traffickers continue to target specific parts of those regions. In 2015, significant annual cocaine seizures were reported by Australia (1,246 kg), Hong Kong, China (227 kg), Lebanon (337 kg), the Russian Federation (954 kg), Turkey (556 kg) and the United Arab Emirates (218 kg).

D. Amphetamine-type stimulants

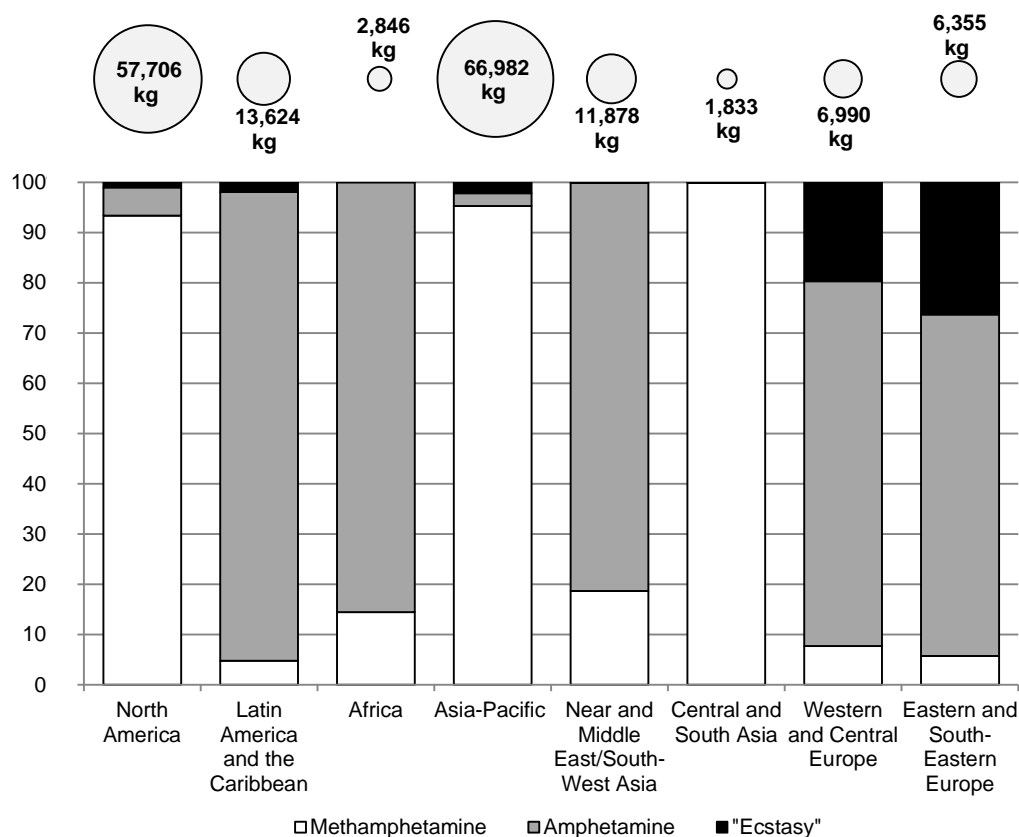
60. Amphetamine-type stimulants can be broadly classified as amphetamines, which include amphetamine and methamphetamine, and “ecstasy”-type substances, which include 3,4-methylenedioxymethamphetamine (MDMA, commonly known as “ecstasy”). The collection of high-quality seizure data relating to amphetamine-type stimulants relies heavily on the proper identification and classification of seized controlled substances, which is not the case with the collection of seizure data for plant-based drugs.

61. As shown in figure XIV, the two regions with the highest amounts of amphetamine-type stimulants seized in 2015 are North America and Asia-Pacific, the two main markets for methamphetamine worldwide. Large seizures were also recorded in the Near and Middle East and South-West Asia, the regions where most of the global amphetamine trafficking occurs (see figure V). In Europe, which represents a large portion of the global “ecstasy” market, significant amounts of amphetamine-type stimulants were seized as well (see figure V). There were no major differences in 2015 in the distribution of such seizures between Western and Central Europe on the one hand and Eastern and South-Eastern Europe on the other. The large amount of amphetamine-type stimulants seized in Latin America and the Caribbean in 2015 is mostly the result of a single multi-ton amphetamine seizure by Guatemala.

²⁸ *EU Drug Markets Report*.

²⁹ *Ibid.*

Figure XIV
Total seizures of amphetamine-type stimulants and distribution of seizures, by region and drug type (2015)^a
 (Percentage)



^a Data are preliminary.

62. The emergence of new psychoactive substances as a growing market in recent years has been thoroughly discussed during the meetings of the subsidiary bodies of the Commission on Narcotic Drugs. A limited number of countries report seizures of such substances in their annual report questionnaires. However, UNODC has developed the global Synthetics Monitoring: Analyses, Reporting and Trends (SMART) programme with the objective of monitoring global and regional trends in the markets for new psychoactive substances and other synthetic drugs.

Methamphetamine

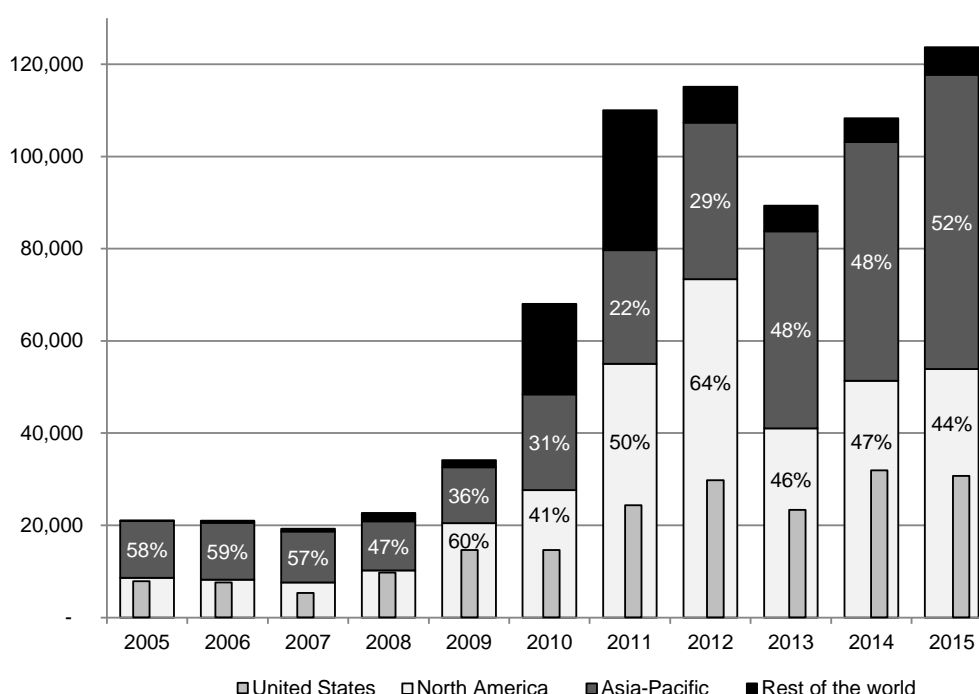
63. The regions of Asia-Pacific and North America, as methamphetamine consumer markets, account for most of the methamphetamine seized globally, and the illicit manufacture of methamphetamine has traditionally been concentrated close to these regions. However, recently the illicit manufacture of methamphetamine has also spread to other countries and regions, with recent reports of new trafficking flows connecting previously unconnected subregions.³⁰ In 2015, global methamphetamine seizures reached record levels (see figure XV).

³⁰ UNODC, "Global SMART update", vol. 12 (September 2014).

64. Methamphetamine seizures in North America, increased slightly, mostly owing to an increment reported by Mexico. The United States reported a slight decrease, from 31 tons in 2014 to 30 tons in 2015, the two highest levels since 2002. National authorities reported a significant increase in liquid methamphetamine seizures, especially along the south-western border, where the drug is smuggled from Mexico and where conversion laboratories are in place.³¹ Almost 80 per cent of conversion laboratories seized in the United States are located in California.³² Methamphetamine seizures in Mexico increased for the second consecutive year, from 17.9 tons in 2013 to the equivalent of 23.5 tons in 2015, including almost 9,000 litres of liquid methamphetamine. The Mexican authorities reported that methamphetamine was produced in clandestine laboratories using chemical precursors, most of which were trafficked from China and the United States.³³

Figure XV

Global seizures of methamphetamine, by region (2005-2015)^a
(Kilograms)



^a Data for 2015 are preliminary.

65. In the Asia-Pacific region, methamphetamine seizures have been increasing steadily since 2008, with the total amount seized in the region increasing six fold over the period 2008-2015. In East and South-East Asia, methamphetamine is trafficked in tablets and in crystalline form. Tablets are manufactured and trafficked mostly within the Mekong subregion (notwithstanding recent evidence of the presence of tablets in Malaysia, the Republic of Korea and Singapore). Crystalline methamphetamine is spread throughout the region.³⁴

³¹ Response submitted by the United States to the annual report questionnaire for 2015.

³² 2016 National Drug Threat Assessment.

³³ Response submitted by Mexico to the annual report questionnaire for 2015.

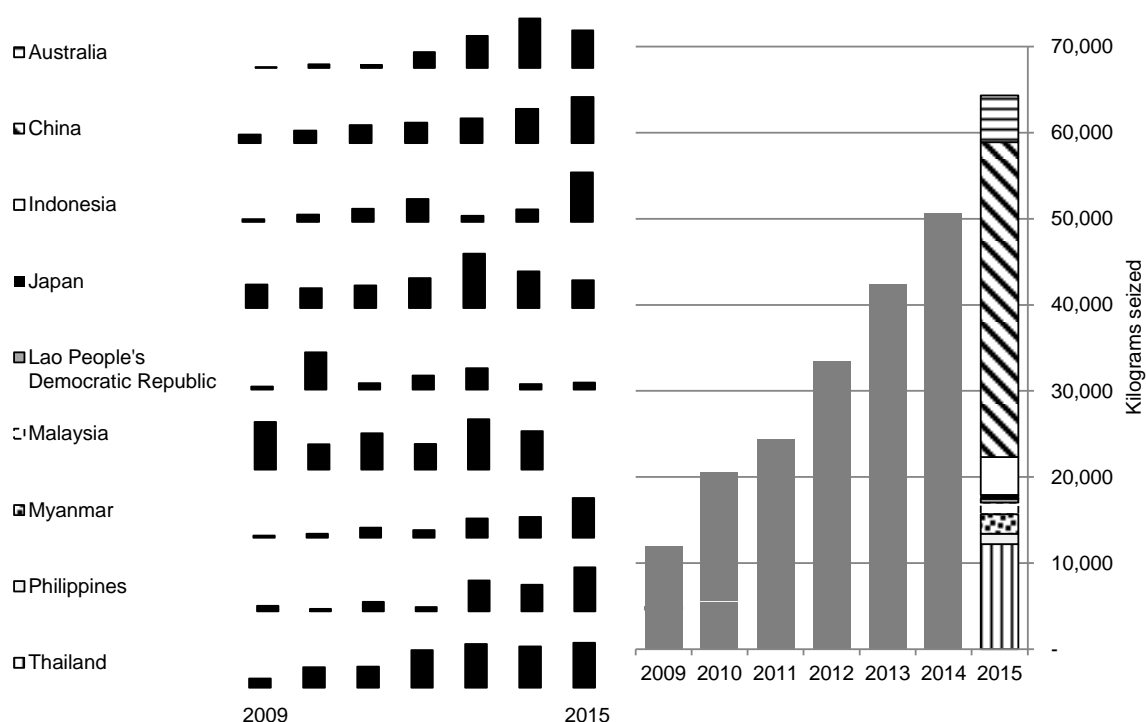
³⁴ UNODC, the global SMART programme, "The challenge of synthetic drugs in East and South-East Asia and Oceania: trends and patterns of amphetamine-type stimulants and new psychoactive substances" (May 2015).

66. Methamphetamine seizures in China have increased every year in recent years, from 6 tons in 2008 to over 36 tons in 2015, the highest value reported by a single country that year. Chinese authorities reported that about 88 per cent of seized methamphetamine tablets are produced in the Golden Triangle, while most of the crystalline methamphetamine trafficked in the country is produced in China itself.³⁵ As seen in figure XVI, there has been a sharp increase in the Asia-Pacific region resulting from a rise not only in China, but in many countries in the region. In Australia, methamphetamine seizures remained high at 5.4 tons in 2015, the second highest value on record after the 7.1 tons seized the previous year. Significant amounts of methamphetamine are seized annually in Indonesia, Japan, the Lao People's Democratic Republic, Malaysia, Myanmar, Thailand and the Philippines, with the majority of those countries showing strong increasing trends since 2009.

67. The Japanese authorities reported that while China was the main source of the methamphetamine found in the country, in recent years there has been a diversification of sources, with methamphetamine also entering the country from Thailand, Mexico and Hong Kong, China, in 2015.³⁶ Mexico was also mentioned as the source of 28 per cent of seized methamphetamine in New Zealand in 2015, where a record 371 kg were seized.³⁷

Figure XVI

Seizures in selected countries in the Asia-Pacific region (2009-2015)^a
(Kilograms)



^a At the time of writing, no seizure data for 2015 were available for Malaysia. Data for 2015 for the Lao People's Democratic Republic include only seizures made during the first six months of the year.

³⁵ Country report submitted by China to the Fortieth Meeting of Heads of National Drug Law Enforcement Agencies, Asia and the Pacific.

³⁶ Country report submitted by Japan to the Fortieth Meeting of Heads of National Drug Law Enforcement Agencies, Asia and the Pacific.

³⁷ Response submitted by New Zealand to the annual report questionnaire for 2015.

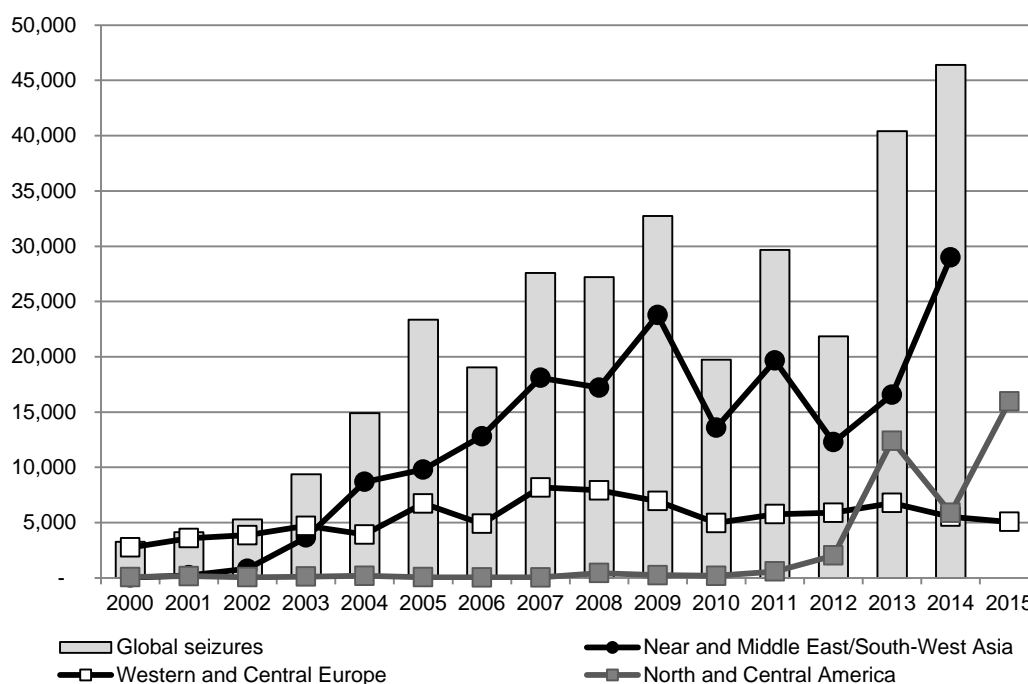
68. Outside the two main markets, significant methamphetamine seizures were reported in Guatemala, Iran (Islamic Republic of) and Nigeria, with 421 kg, 2,143 kg and 411 kg, respectively, in 2015. While Guatemala seized a combined 1.8 tons of methamphetamine during the period 2014-2015, the Islamic Republic of Iran has seized over one ton every year since 2010 and reported the detection of 216 methamphetamine laboratories in 2015. Nigerian authorities reported an increasing trend in the production of crystalline methamphetamine in clandestine laboratories in the country for trafficking, mostly by air.³⁸ In addition, Bangladesh reported seizing the equivalent of 1.8 tons of methamphetamine in 2015, mostly produced in Myanmar.

Amphetamine

69. Since 2004, global amphetamine seizures have been concentrated mostly in the Near and Middle East and South-West Asia (see figure XVII). In particular there has been a marked increase in Saudi Arabia, from less than 100 kg of amphetamine seized annually before 2003 to a record 17 tons in 2014. At the time of writing, no information was available regarding amphetamine seizures in Saudi Arabia in 2015. The increase in the region is a consequence not only of the rise in Saudi Arabia; other Member States have also experienced an increasing trend in recent years (see figure XVIII). Record amphetamine seizures were reported in Jordan and Lebanon in 2014, with 5.4 tons and 6 tons, respectively, while Pakistan and the Syrian Arab Republic recorded historical highs of 2.9 and 4.2 tons, respectively, in 2015.

Figure XVII

Global seizures of amphetamine, by region (2000-2015)
(Kilograms)



70. In Western and Central Europe, amphetamine seizures have remained relatively stable since 2005, with Germany, the United Kingdom and other countries consistently reporting significant annual seizures. While amphetamine seizures in Germany have

³⁸ Response submitted by Nigeria to the annual report questionnaire for 2015.

remained between 1.2 tons and 1.4 tons since 2008, the United Kingdom has reported 612 kg and 624 kg seized in 2014 and 2015, respectively, down from levels that oscillated between 1 and 3.5 tons during the period 2000-2013.

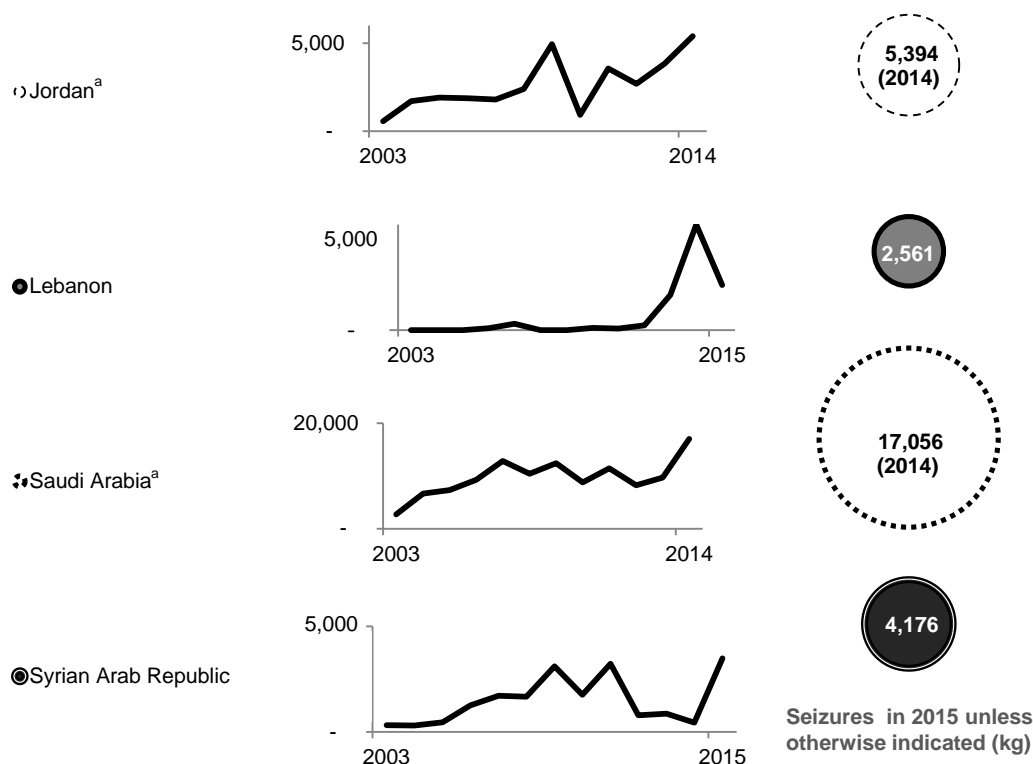
71. In recent years there has been an increased presence of amphetamine in the Americas, in particular in North and Central America (see figure XVII). With over 12 tons, the United States was the country that reported the highest amount of amphetamine seized globally in 2013. While seizures have decreased in recent years to 4.3 tons and 2.7 tons in 2014 and 2015, respectively, they remain significantly above the levels reported in previous years. In Guatemala, seizures reached over 1.5 tons in 2014 and 12.7 tons in 2015, mostly owing to an unprecedented multi-ton seizure that year. Mexico also reported seizing a record amount of amphetamine in 2015, namely 300 kg.

72. In recent years there has also been an increase in amphetamine seizures in Africa. While seizures on the continent were virtually insignificant until 2012, Côte d'Ivoire, Chad and Egypt each reported multiple tons of amphetamine seized in 2013, 2014 and 2015, respectively.

Figure XVIII

Amphetamine seizures in selected countries in the Near and Middle East (2003-2015)

(Kilograms)



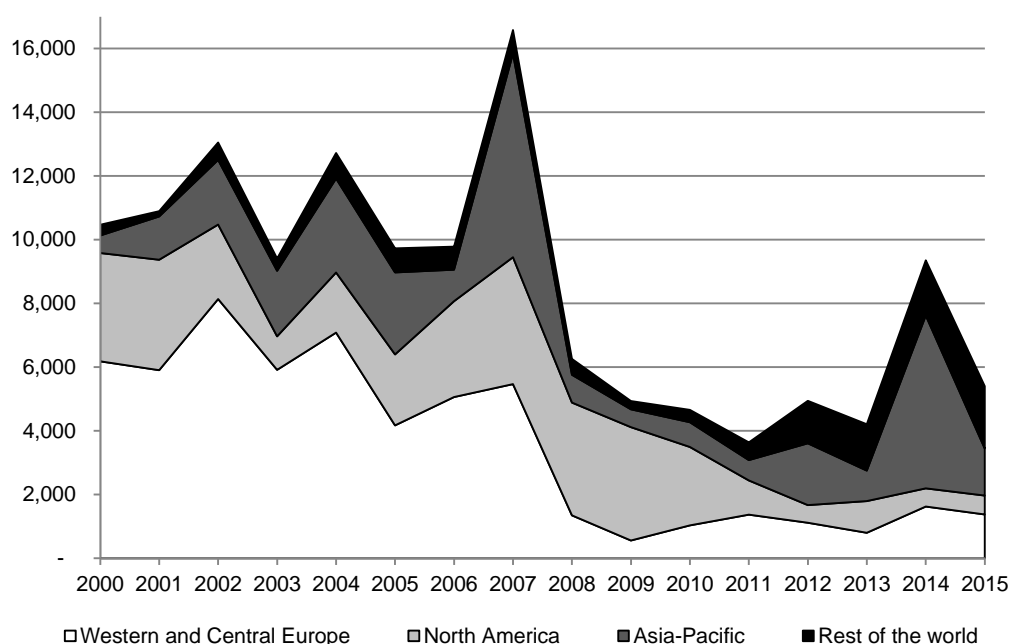
“Ecstasy”-type substances

73. After increasing to 9.3 tons in 2014, global seizures of “ecstasy”-type substances decreased to 5.4 tons, still a higher level than that observed during the 2009-2013 period, when seizures averaged 4.5 tons. As seen in figure XIX, seizures of MDMA have followed a decreasing trend over the last 15 years, mostly owing to market declines in North America and in Western and Central Europe. In recent years, global trends seem to be more affected by regional tendencies in the Asia-Pacific region, suggesting that the Asia-Pacific region might be emerging as a driver of the global market for “ecstasy”.³⁹ Other regions have also seen sharp increases in “ecstasy” seizures in recent years, in particular South-Eastern Europe on account of seizures in Turkey.

74. In 2015, Turkey reported the highest amounts of “ecstasy”-type substances seized by a single country, with a record 1,538 kg. Turkey has reported close to one ton seized annually between 2012 and 2015, up from an average of 285 kg during the previous 9 years. After reaching 4,375 kg in 2014, “ecstasy” seizures in Australia decreased to 671 kg in 2015. Other countries that reported significant amounts of MDMA seized in 2015 were the United States (570 kg), France (359 kg), Indonesia (599 kg) and the United Kingdom (307 kg).

Figure XIX

Global seizures of “ecstasy”-type substances, by region (2000-2015)^a
(Kilograms)



^a Data for 2015 are preliminary.

³⁹ UNODC, the global SMART programme, “The challenge of synthetic drugs in East and South-East Asia and Oceania”.

IV. Conclusions

75. The cultivation of cannabis continues in most countries worldwide and in all regions of the world, while the production of cannabis resin remains confined to a few countries. Globally, cannabis herb seizures have remained stable since 2012, while preliminary data suggest that cannabis resin seizures increased slightly for the second consecutive year in 2015.

76. After decreasing in 2015 for the first time in six years, the global area under opium poppy cultivation increased again in 2016, as suggested by preliminary data. Global seizures of opium and illicit morphine remain concentrated in Afghanistan and neighbouring countries, while heroin seizures cover a wider geographic area. Global heroin seizures have remained relatively stable since 2008, at levels significantly higher than those recorded in previous years.

77. After reaching historically low levels in 2013, the total area under coca bush cultivation increased for the second consecutive year in 2015, as a result of sharp increases in Colombia. Global cocaine seizures increased sharply in 2015, reaching unprecedented levels, mostly owing to a sharp increase in South America, which continues to account for the majority of global seizures.

78. Seizures of amphetamine-type stimulants have been following a sharply increasing trend since 2008, with 2015 marking a new global record. While global amphetamine and methamphetamine seizures have followed sharply increasing trends over the last 15 years, seizures of “ecstasy”-type substances have decreased over the same period.
