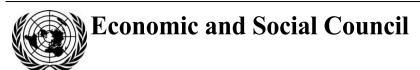
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Commission on Narcotic Drugs

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Item 6 of the provisional agenda*
Follow-up to the implementation at the national, regional and international levels of all commitments, as reflected in the Ministerial Declaration of 2019, to address and counter the world drug problem

World situation with regard to drug trafficking

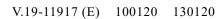
Report of the Secretariat

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 2018, where the data are available.

Despite being severely affected by drought, the area under opium poppy cultivation was nevertheless at its second largest extent since monitoring began. Afghanistan again accounted for the largest area under illicit cultivation globally in 2018. The amount of heroin seized globally increased sharply in 2016 and 2017. Preliminary seizure data indicate that the amount of heroin seized globally stood at approximately 78 tons in 2018. Coca bush cultivation remained at the highest levels recorded. In 2018, for the second time on record, the amount of cocaine seized globally surpassed that of cannabis resin. The amount of amphetamine-type stimulants seized globally remained at roughly the same level as in 2017. Cannabis herb continued to be cultivated and seized in most countries worldwide and in all regions, while the production of cannabis resin remained confined to a few countries in South-West Asia and North Africa, the most prominent of which were Afghanistan and Morocco. Worldwide, seizures were concentrated in those two regions and in Europe, where the main consumer market is located.







^{*} E/CN.7/2020/1.

I. Introduction

- 1. The present report provides an overview of developments in the illicit production of and trafficking in the main drugs at the global and regional levels. The analysis includes information available to the United Nations Office on Drugs and Crime (UNODC) up to 1 December 2019.
- 2. Section II of the report covers the illicit cultivation of drug crops and the production of plant-based drugs for the years up to 2018, where the data are available. Section III contains a discussion of drug trafficking and seizures, focusing on seizure statistics for 2018 and previous years. It provides an update on trafficking trends for cannabis, opiates, cocaine and amphetamine-type stimulants. Section IV contains brief conclusions.
- 3. The principal sources of information on the illicit cultivation of drug crops and the production of plant-based drugs are the most recent UNODC illicit crop monitoring surveys. In addition, replies by Governments to part IV of the annual report questionnaires for 2018 and previous years provide the primary source of information on drug trafficking patterns and drug seizures.
- 4. As of December 2019, UNODC had received replies to part IV of the annual report questionnaire from 99 Member States and one territory. 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 2019* was also used in the present analysis. In total, seizure data for 2018 were available for 88 States and territories.

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

A. Cannabis herb cultivation and cannabis resin production

- 5. Cannabis continues to be the most widely produced drug worldwide. In contrast with the production of other plant-based drugs, which is concentrated in a limited number of countries, cannabis is produced in almost all countries. In the past two decades, there have been rapid advances in cannabis plant cultivation techniques. Reports of cannabis cultivation and eradication reveal that a wide range of practices exist globally, from the growing of a small number of plants for personal consumption to large-scale commercial operations in indoor warehouses, on farmland and in forests.
- 6. The cannabis market has been undergoing transition amid changes in legal statutes in some Member States. Seizure data suggest that the cultivation of cannabis herb continued to occur in most countries worldwide and in all regions. The Americas continued to account for the largest share of cannabis herb seizures. South America accounted for 38 per cent of the global total in 2017, and North America for 21 per cent. In contrast, the large-scale production of cannabis resin remained confined to a few countries in North Africa, the Middle East and South-West Asia, the most prominent of which were Afghanistan and Morocco.
- 7. Morocco reported that, in 2018, the area under cannabis cultivation in the country remained stable, standing at approximately 47,500 ha; however, annual production of cannabis resin fell by 41 per cent, from 714 tons in 2017 to 426 tons in 2018.² National authorities estimated cannabis herb production in Morocco at 23,700 tons, a 34 per cent decrease compared with 2017. According to the authorities

¹ World Drug Report 2019: Executive Summary – Conclusions and Policy Implications (United Nations publication, Sales No. E.19.XI.9 (Booklet 1)).

² United Nations Office on Drugs and Crime (UNODC), annual report questionnaire replies submitted by Morocco for 2018.

- of Morocco, cannabis trafficking by sea to European countries, in particular to Spain and mainly directed by foreign networks, remained a major challenge.
- 8. Over the period 2010–2017, approximately 159 Member States, representing 97 per cent of the world's population, on the basis of either direct indicators (cultivation or eradication of cannabis plants and eradication of cannabis-producing sites) or indirect indicators (seizure of cannabis plants), reported the illicit cultivation of cannabis in their countries.³

B. Opium poppy cultivation

- 9. The year 2018 witnessed a decline of 17 per cent in the area under opium poppy cultivation, to 346,000 ha. The area under cultivation globally continued to be more than 60 per cent greater than it had been a decade ago. Afghanistan and Myanmar continued to account for more than 80 per cent of global cultivation.
- 10. After increasing every year in the period 2009–2014, global opium poppy cultivation decreased for the second time in 2018, primarily as a result of the 20 per cent decrease in cultivation in Afghanistan. However, the area under poppy cultivation (263,000 ha)⁴ in that country remained at a significantly higher level than that observed before 2017 (see figure I).
- 11. In the period 2010–2016, the average area under opium poppy cultivation in Afghanistan had been approximately 175,000 ha. After having reached an unprecedented 328,000 ha in 2017, the area under cultivation in Afghanistan decreased to 263,000 ha in 2018. Despite being severely affected by drought⁵ in the northern region and parts of the western region, and notwithstanding low opium prices, the area under cultivation was nevertheless at its second largest extent since monitoring began. Afghanistan again accounted for the largest area under illicit opium poppy cultivation globally in 2018. While all regions of Afghanistan experienced a decline in cultivation during 2018, the sharpest decreases were observed in the northern and western regions, which accounted for about 70 per cent of the decrease in cultivation at the national level in 2018.

³ World Drug Report 2019: Cannabis and Hallucinogens (United Nations publication, Sales No. E.19.XI.9 (Booklet 5)).

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⁴ UNODC and Ministry of Counter Narcotics of Afghanistan, *Afghanistan Opium Survey 2018:* Cultivation and Production (November 2018).

⁵ Ibid.

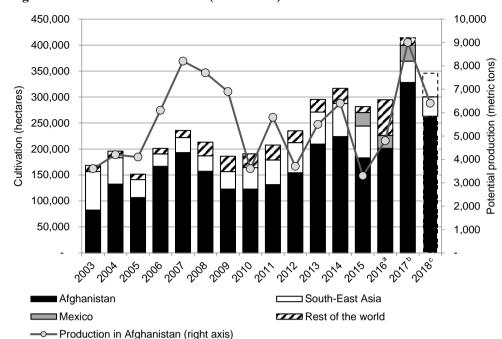


Figure I
Opium poppy cultivation by region, and potential opium production in
Afghanistan and South-East Asia (2003–2018)

- ^a No information is available for South-East Asia for 2016.
- b Only information on opium poppy cultivation in the Shan and Kachin States of Myanmar was available for 2017.
- ^c No data on opium poppy cultivation in Mexico were available for 2018 at the time of writing.
- 12. Global opium production in 2018 fell by 25 per cent compared with the previous year, to 7,790 tons, which was nevertheless the second highest level recorded since UNODC started systematic monitoring in the 1990s. The three main opium-producing countries (Afghanistan, Mexico and Myanmar) are estimated to have accounted for roughly 96 per cent of global opium production in 2018. Afghanistan alone accounted for 82 per cent of the total, having produced 6,400 tons of opium, a 29 per cent decrease compared with 2017 (9,000 tons). The decrease was a consequence of not only the notably 20 per cent smaller area under opium poppy cultivation in 2018 but also the lower average yield (11 per cent), which decreased from 27.3 kg per ha in 2017 to 24.4 kg per ha in 2018. The yields observed in recent years have been significantly lower than the levels reached in the years prior to 2012 (see figure II).
- 13. The area under opium poppy cultivation in Myanmar was estimated at 37,300 ha in 2018, representing a decrease of 12 per cent from 2017. Similarly, production continued its downward trend since 2014 and decreased slightly, from 550 tons in 2017 to 520 tons in 2018.⁶ This was possibly a consequence of the decrease in the demand for opiates sourced in Myanmar, which in turn may have been the result of the large-scale production of opium in Afghanistan in 2017, as well as shifts towards the use of synthetic drugs in the markets of East and South-East Asia.^{7,8} Available data show that cultivation in Myanmar has decreased over the past three years. In the Myanmar opium surveys, it was estimated that 41,000 ha were under opium poppy cultivation in the Shan and Kachin States of Myanmar in 2017⁹ and 37,300 ha in the country as a whole in 2018.

⁶ World Drug Report 2019: Global Overview of Drug Demand and Supply (United Nations publication, Sales No. E.19.XI.9 (Booklet 2)).

⁷ UNODC and Myanmar, Central Committee for Drug Abuse Control, Myanmar Opium Survey 2018: Cultivation, Production and Implications (Bangkok, 2019).

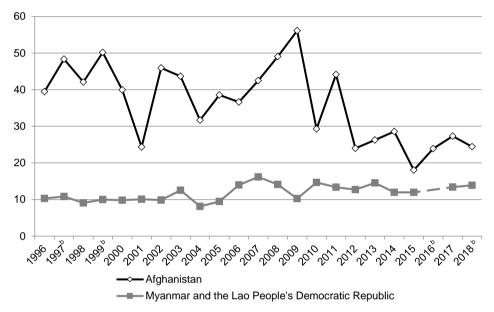
⁸ UNODC, Transnational Organized Crime in Southeast Asia: Evolution, Growth and Impact (Bangkok, 2019).

⁹ These two regions typically account for 98 per cent of national cultivation.

14. The opium poppy yield in the Lao People's Democratic Republic and Myanmar has traditionally been significantly lower than that in Afghanistan, owing mainly to the geographical and soil conditions of the areas where the opium poppy is cultivated in the Lao People's Democratic Republic and Myanmar (see figure II). The Myanmar opium survey for 2018¹⁰ reported that the yield in Myanmar was at approximately 13.9 kg per ha, representing a 4 per cent increase compared with the estimated yield of 13.4 kg per ha in 2017.

Figure II Yield of opium poppy cultivation in Afghanistan and in the Lao People's Democratic Republic and Myanmar (1996–2018)^a

(Kilograms per hectare)



^a Data for 2018 are preliminary.

15. Roughly 96 per cent of estimated total global opium production is accounted for by Afghanistan, Myanmar and Mexico. According to the most recent Mexico opium surveys, ¹¹ the areas under opium poppy cultivation were estimated at 26,100 ha, 25,200 ha and 30,600 ha, respectively, which represented about 7–9 per cent of global cultivation in the periods 2015–2016 and 2016–2017, and in 2018. An estimated 462 ha were under opium poppy cultivation in Colombia in 2016 and 129 ha in Guatemala in 2018.

C. Coca bush cultivation

16. Bolivia (Plurinational State of), Colombia and Peru continued to account for virtually all cultivation of coca bush worldwide. The total area under such cultivation in the three countries remained stable in 2018, amounting to 246,218 ha (see figure III). The year 2018 witnessed decreases in coca bush cultivation of about 6 per cent in the Plurinational State of Bolivia and about 1.2 per cent in Colombia, which were offset by a 4.4 per cent increase in such cultivation in Peru.

17. Coca bush cultivation in Colombia remained close to its highest recorded level, registered in 2017. As indicated in the Colombia coca cultivation survey for 2018, the area under cultivation in Colombia decreased by 1.2 per cent, standing at 169,000 ha

¹⁰ UNODC, Myanmar Opium Survey 2018.

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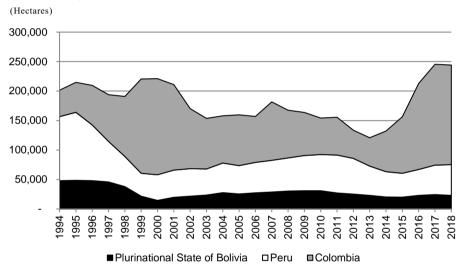
^b The amounts shown for the Lao People's Democratic Republic and Myanmar for 1997, 1999, 2016 and 2018 consist of the yield in Myanmar alone.

¹¹ UNODC and Mexico, *México: Monitoreo de Cultivos de Amapola 2015-2016 y 2016-2017*, 2nd ed. (Mexico City, 2019).

- in 2018, the second highest on record in the country. Despite an 8 per cent decrease from 2017, Narino remains the region most affected by coca bush cultivation.
- 18. After reaching 290 tons in 2013, the lowest value since the mid-1990s, potential cocaine manufacture in Colombia increased sharply, to 1,053 tons in 2016 and 1,379 tons in 2017. That increase in manufacture was accompanied by an increase in the number of laboratories for the extraction of cocaine paste and base that were dismantled, from 2,172 in 2014 to 4,219 in 2018. 12
- 19. In the Plurinational State of Bolivia, the area under coca bush cultivation decreased by 6 per cent, from 24,500 ha in 2017 to 23,100 ha in 2018. After decreasing in 2015 to the lowest amount since 2005, potential coca production in the country increased by 17 per cent, reaching 38,000 tons in 2016. In 2017, estimates for coca production were within the range 35,500–44,200 tons. The total area of coca bush eradicated in the Plurinational State of Bolivia increased by 54 per cent in 2018, from 7,237 ha in 2017 to 11,174 ha.

Figure III

Coca bush cultivation in Bolivia (Plurinational State of), Colombia and Peru^a
(1994–2018)^b



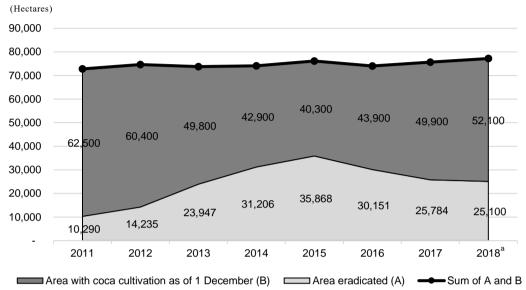
- ^a A 2018 coca survey for Peru was not available to UNODC. Therefore, the coca bush cultivation data for 2018 were obtained from the White House Office of National Drug Control Policy, see "ONDCP releases data on coca cultivation and production in Peru", 30 September 2019.
- ^b Data for 2018 are preliminary.
- 20. In 2015, the area under coca bush cultivation in Peru was 40,300 ha, the smallest area recorded since 1999. In 2018, the size of the area increased by 4.4 per cent for the third year in a row and reached 52,100 ha. ¹³ The increase in 2017 had resulted in an 11 per cent increase in potential production of sun-dried coca, from 106,000 tons in 2016 to 117,300 tons in 2017.
- 21. Peruvian authorities reported the eradication of 25,100 ha of coca bush cultivation in 2018, a 30 per cent decrease compared with the record of 35,868 ha eradicated in 2015. That decrease in eradication mirrored the increase in area under cultivation in Peru (see figure IV).
- 22. 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. Colombian authorities continued to report that coca base was increasingly being trafficked and converted to cocaine

¹² UNODC and Colombia, Monitoreo de Territorios Afectados por Cultivos Ilícitos 2018 (August 2019), p. 70.

White House Office of National Drug Control Policy, "ONDCP releases data on coca cultivation and production in Peru", 30 September 2019.

hydrochloride outside the country and seizures in international waters confirmed that trend. ¹⁴ According to the available data, several countries in South America, including Argentina, Brazil, Paraguay and Venezuela (Bolivarian Republic of), reported the detection of clandestine laboratories processing coca leaf derivatives. In 2018, Belgium, Greece and Spain also reported the detection of such laboratories. ¹⁵

Figure IV Coca bush cultivation and eradication in Peru (2011–2018)



^a Data on coca bush cultivation and eradication for 2018 are preliminary.

III. Global trends in illicit drug trafficking and seizures

23. The table below shows the quantities of major drug types seized globally and reported to UNODC in the period 2015–2018.

Global drug seizures and trends, 2015-2018

(Tons)

Drug type	2015 seizures	2016 seizures	2017 seizures	2018 seizures ^a
Cannabis herb	6 011.2	4 770.5	5110.9	2254.7
Cannabis resin	1 537.7	1 683.4	1 161.5	940.4
Cocaine ^b	918.5	1 128.8	1 275.3	1013.6
Heroin	82.5	90.9	102.6	78.3
Illicit morphine	9.6	65.3	87.0	38.6
Opium	586.8	662.0	692.8	678.3
Amphetamine	52.0	70.7	50.8	14.8
Methamphetamine	141.5	158.6	174.2	182.9
"Ecstasy"-type substances	10.2	14.0	14.0	12.4

^a Since data for 2018 were incomplete at the time of preparation of the present report, totals for 2018 are preliminary.

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^b Includes base, paste, salts and "crack" cocaine.

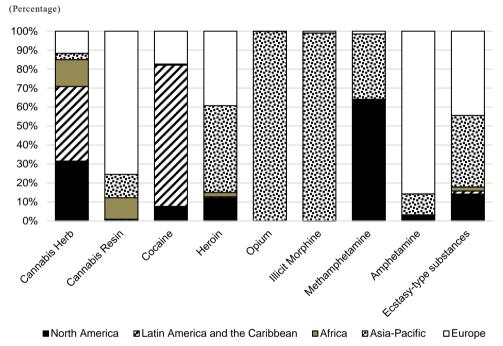
¹⁴ UNODC, annual report questionnaire replies submitted by Colombia for 2017 and 2018.

¹⁵ Annual report questionnaires from those countries submitted to UNODC in 2018.

- 24. The quantity of annual global drug seizures for 2018 is calculated on the basis of the quantities of narcotic drugs seized by Member States and reported to UNODC. At the time of writing, the seizure data from some Member States were not available.
- 25. At the global level, there were decreases in the amounts seized of cannabis herb and resin, cocaine, heroin, illicit morphine, opium, amphetamine and "ecstasy"-type substances; amounts seized of methamphetamine did not decrease. The decreases could be attributed to the fact that 2018 seizure data were incomplete and preliminary. Nevertheless, in 2018, for the second time on record, the amount of cocaine seized globally surpassed that of cannabis resin. In 2018, the Americas accounted for 71 per cent of the cannabis herb seized globally. Europe accounted for approximately 75.5 per cent of the cannabis resin seized (see figure V). In 2018, for the second time on record, the amount of cannabis herb seized in South America was higher than that seized in North America. More than 70 per cent of the cannabis resin and heroin, 80 per cent of amphetamine and more than 40 per cent of "ecstasy"-type substances seized globally were seized in Europe. The Asia-Pacific region¹⁶ accounted for about 38 per cent of the "ecstasy"-type substances seized and 46 per cent of the heroin seized.

Figure V

Geographical distribution of seizures by drug type (2018)^a



^a Data for 2018 are preliminary.

A. Cannabis

26. In 2018, 71 per cent of cannabis seized globally was seized in the Americas, where it is almost exclusively trafficked in herbal form. The proportion of cannabis herb and cannabis resin seized in Europe increased by 4 per cent and 27 per cent, respectively. In Africa, most of the cannabis resin is produced and trafficked in North Africa; in sub-Saharan Africa, cannabis is trafficked almost exclusively in herbal form. Despite an increase in trafficking in herbal cannabis in recent years, cannabis resin continues to account for most of the cannabis seized in Europe (see figure VI).

¹⁶ "Asia-Pacific region" refers to the regions of Asia and Oceania collectively.

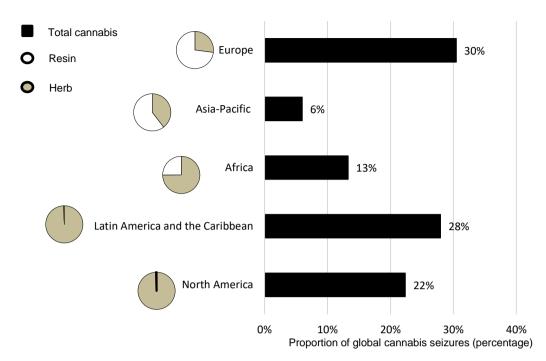


Figure VI **Proportion of global cannabis seizures, by region and type (2018)**^a

^a Data are preliminary.

Cannabis herb

- 27. According to the preliminary data, the United States of America, Nigeria, Brazil, Colombia and Argentina reported the largest amounts of cannabis herb seized globally in 2018. The Americas have accounted for more than 60 per cent of seizures globally every year since the early 1990s. Over the past decade, the amount seized in the Americas has declined sharply, from 3,033 tons in 2017 to 1,598 tons in 2018. The data from 2018 suggest that that global downward trend will continue. Between 2013 and 2015, the decline in North America was offset by increases in Latin America and the Caribbean and Africa, with the amount seized globally increasing slightly (see figure VII). Despite increased seizures observed in Latin America and the Caribbean in 2017, the amount seized globally remained at levels lower than those observed in previous years, owing mainly to further decreases in North America.
- 28. The amount of cannabis herb seized in North America decreased sharply from 4,700 tons in 2010 to less than 1,000 tons in 2018, the lowest value recorded since 1993. In 2018, the United States reported a decrease of 63 per cent in the amount seized. United States authorities reported that the continued decreasing trend in cannabis herb trafficking observed since 2010 may also be related to the legalization of recreational use in some states and the corresponding increase in domestic production.¹⁷
- 29. Unlike in North America, the amount of cannabis herb seized in South America has increased notably since 2009, from less than 700 tons in that year to more than 1,950 tons in 2017. In 2018, Colombia and Brazil reported significant decreases, 44 per cent (272 tons) and 22 per cent (264 tons), respectively.
- 30. In the period 2009–2018, cannabis herb seizures in Western and Central Europe doubled, from 65 tons to 179 tons, in part because domestically produced herbal products have become more prevalent, displacing imported resin in many countries. Hybrid multi-strain plants yielding higher-potency cannabis have begun to replace established forms of the plant both within Europe and in Morocco, where much of the

¹⁷ UNODC, annual report questionnaire replies submitted by the United States for 2016 and 2018.

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cannabis resin used in Europe originates.¹⁸ A large proportion of the herbal cannabis consumed in the European Union is grown there, rather than being imported, reducing the need to traffic the drug across external borders and lowering the risk of interdiction.¹⁹ In 2018, the amount of cannabis herb seized in Western and Central Europe decreased by 17 per cent compared with 2017, from almost 216 tons to 179 tons. However, that figure is 30 per cent higher than that for 2016.

- 31. The largest cannabis herb seizures in Western and Central Europe were reported by Italy, with a record 39 tons in 2018, a decrease of more than 50 per cent compared with 2017. Spain reported 37 tons seized in 2018, approximately 8 per cent more than in 2017. In South-Eastern Europe, the total amount seized decreased by more than 60 per cent in 2018, from 186 tons to 72 tons, with Albania and Turkey reporting 20 tons and 38 tons, respectively.
- 32. The amount of cannabis herb seized in Africa has remained at an average of approximately 880 tons since 2013. The only exception was 2015, when it reached 1,618 tons as a result of a record seizure (some 872 tons) in Nigeria. In 2017, the total amount seized in Africa was approximately 881 tons. In 2018, the total seizure in Africa was around 317 tons, although data from most of the Northern African States are missing. While information on seizures in the region is limited, ²⁰ some countries that have reported seizing large amounts have consistently responded to part IV of the annual report questionnaire. In the period 2003–2017, Egyptian authorities reported the seizure of an average of more than 280 tons annually. The latest seizure report from 2017 indicates that 243 tons were seized that year. Except for the 871 tons reported in 2015, the amount seized in Nigeria fluctuated between 158 tons and 272 tons annually in the period 2013–2018.
- 33. Within Asia, cannabis herb trafficking has traditionally been most prominent in South Asia, with Bangladesh and India accounting for more than half of the total amount seized in the region. In 2018, the amount seized in Indonesia decreased from the record levels of more than 151 tons to 41 tons. In Central Asia, seizures are concentrated mostly in Kazakhstan, where 17 tons were seized in 2018, lower than the average of 28 tons in the period 2013–2018.

¹⁸ European Monitoring Centre for Drugs and Drug Addiction (EMCDDA), European Drug Report 2019: Trends and Developments (Luxembourg, Publications Office of the European Union, 2019).

¹⁹ EMCDDA and European Union Agency for Law Enforcement Cooperation (Europol), EU Drug Markets Report 2019 (Luxembourg, Publications Office of the European Union, 2019).

²⁰ At the time of writing, 12 countries in Africa had reported cannabis herb seizures in their annual report questionnaire responses for 2018.

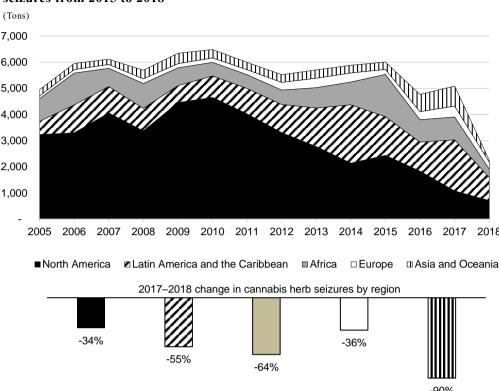


Figure VII Cannabis herb seized, by region (2005–2018), and the change in regional seizures from 2015 to 2018^a

^a Data for 2018 are preliminary.

Cannabis resin

- 34. Unlike the cultivation of cannabis herb, the production of cannabis resin is concentrated in a small number of countries, primarily Afghanistan²¹ and Morocco. The latter reported an average of 165 tons of cannabis resin seized in the period 2015–2018. The amount seized in Morocco was approximately 72 tons, 39 per cent down from 2017. Statistics show that seizures of cannabis resin are also concentrated in North Africa, South-West Asia and Western and Central Europe, the main consumer markets (see figure VIII).
- 35. As the main entry point for cannabis resin trafficked from Morocco into Western Europe, Spain has traditionally seized the largest amount of the product. In 2018, Spain reported a total of 437 tons of cannabis resin seized, a 31 per cent increase compared with the 335 tons seized in 2017. The total amount of cannabis resin seized in Western and Central Europe increased from 469 tons in 2017 to 667 tons in 2018, mostly as a result of increases in seizures in Italy, Malta, Spain and neighbouring countries. While France reported seizing 85 tons in 2018, a 27 per cent increase compared with 2017, seizures sharply declined in Portugal, from almost 15 tons in 2017 to 4.2 tons in 2018. In contrast, the amount seized in Italy increased more than four times in 2018, from less than 19 tons in 2017 to 78.5 tons. After three consecutive increases reported in 2015 (7.8 tons), 2016 (36 tons) and 2017 (81 tons), the amount seized in Turkey decreased in 2018 to 31 tons, the level observed in 2016.
- 36. After increasing every year in the period 2010–2014, from 157 tons to a record 458 tons, the amount of cannabis resin seized in North Africa further declined, from 204 tons in 2017 to 104 tons. ²² In 2018, Algeria and Morocco reported further

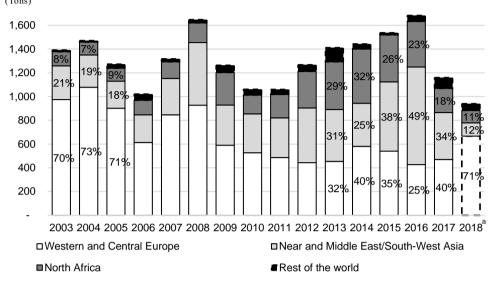
At the time of writing, 2018 cannabis seizure data from Afghanistan were not available to UNODC.

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²² 2018 seizure figures from Egypt, the Sudan, and Tunisia were not available at the time of writing.

decreases of more than 40 per cent compared with 2017, with 32 tons and 72 tons seized, respectively. This represents the fifth consecutive annual decrease in Algeria, following the record 212 tons reported in 2013. In Egypt, after peaking at 84 tons, the amount seized decreased to about 34 tons in 2015. The latest seizure report in 2017 confirms the stable trend in Egypt, at an average 310 tons in the period 2015–2017.

Figure VIII Global cannabis resin seizures, by region (2003–2018)^a



^a Data for 2018 are preliminary.

37. Seizures of cannabis resin in the Near and Middle East and South-West Asia are concentrated in Afghanistan and the neighbouring countries of Iran (Islamic Republic of) and Pakistan. After reaching record levels in 2016, with 829 tons seized in the region, the amount seized decreased sharply, to 396 tons in 2017 and 111 tons in 2018. The decrease was mainly a consequence of a sharp decline in Afghanistan, where fewer than 37 tons were seized in 2017, down from 352 tons in 2016. The amount seized in the Islamic Republic of Iran increased 85 per cent and reached the highest level on record in 2018, increasing from 109 tons in 2017 to 202 tons. According to the Iranian authorities, 20 per cent of seizures in the country in 2018 were destined for local consumption, 65 per cent were being trafficked into the other Gulf States and the remaining 15 per cent were en route to Turkey and the Caucasus. In 2017, Pakistan reported 210 tons seized, the lowest level reported since 2012.

B. Opiates

Opium and illicit morphine

38. The Near and Middle East and South-West Asia account for between 95 and 100 per cent of the opium and illicit morphine seized globally. Seizures in the region occur almost exclusively in Afghanistan²⁵ and the neighbouring countries of Iran (Islamic Republic of) and Pakistan.

39. Since 2012, the amount of opium seized has shown an increasing trend, reaching more than 690 tons in 2017, the highest level on record (see figure IX). In 2018, preliminary data (not including seizure figures from Pakistan), indicate a similar level

²³ 2018 seizure figures from Afghanistan and Pakistan were not available at the time of writing.

²⁴ UNODC, annual report questionnaire replies submitted by the Islamic Republic of Iran for 2018.

^{25 2018} seizure data from Afghanistan reflect seizures reported to the Counter Narcotics Police of Afghanistan and the Ministry of Interior only. They do not include information about all seizures made in that country. Seizures made by the international presence in Afghanistan are not normally reported to the Afghan Government or to UNODC.

of seizures (678 tons). The Islamic Republic of Iran accounts for approximately 70–90 per cent of the opium seized globally. The amount seized in the Islamic Republic of Iran increased from 630 tons in 2017 to a record 643 tons in 2018. In 2018, the amount seized in Afghanistan increased to 27 tons, from 7 tons in 2017.

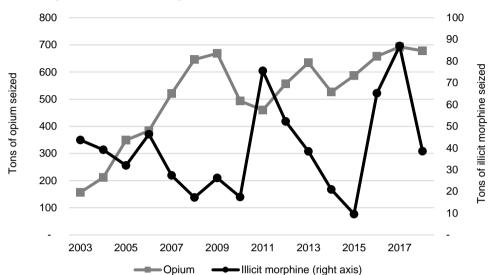


Figure IX

Global opium and illicit morphine seizures (2003–2018)^a

- 40. Having reached the record level of 86 tons in 2017, the amount of illicit morphine seized globally decreased to 39 tons in 2018 (see figure IX), almost the same level registered in 2013. In 2018, the amount seized in Afghanistan declined by around 70 per cent, from 63 tons to 18 tons.
- 41. In Pakistan, 7.3 tons of illicit morphine were seized in 2017, an 11 per cent increase compared with 2016 and the highest level on record since 2008. Authorities from the Islamic Republic of Iran reported seizing more than 20.6 tons, a 37 per cent increase compared with 2017.

Heroin

- 42. In contrast to seizures of opium and illicit morphine, heroin seizures occur in a much greater range of regions and countries (see figure V), in particular around the larger markets of North America, Europe and the Asia-Pacific region. Each of those three markets is supplied in the main by a different producing region. While East and South-East Asia are supplied mainly by production in the Lao People's Democratic Republic and Myanmar, most of Europe is supplied by Afghan heroin that is trafficked along the Balkan route and the southern route through Iran (Islamic Republic of), Pakistan and, increasingly, countries in Africa. The northern route continues to be used for trafficking heroin from Afghanistan to markets in the Russian Federation. In North America, the United States is mostly supplied by heroin produced in Latin America.
- 43. At the global level, the amount of heroin seized remained relatively stable, at between 72 tons and 78 tons, in the period 2008–2013. Seizure data indicate that, after having increased to 102 tons in 2017, the amount seized globally was approximately 78 tons in 2018. ²⁸ Since 2006, the six countries seizing the largest amounts (Afghanistan, China, ²⁹ Iran (Islamic Republic of), Pakistan, Turkey and the United

²⁶ UNODC, Afghan Opiate Trafficking through the Southern Route (Vienna, June 2015).

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^a Data for 2018 are preliminary.

²⁷ UNODC, The Illicit Drug Trade through South-Eastern Europe (Vienna, March 2014).

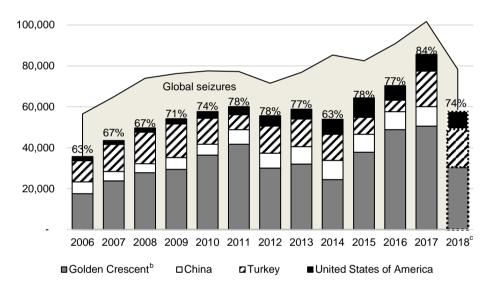
²⁸ The amount of heroin seized in 2018 in Pakistan had not been reported to UNODC at the time of writing.

²⁹ 2018 heroin seizure data from China were not available at the time of writing.

States) accounted for between 63 and 84 per cent of the amount seized globally (see figure X).

44. In the Asia-Pacific region, heroin seizures are concentrated in China, where the average amount of heroin seized annually is approximately 9 tons, which indicates a relatively stable trend over the past five years. National authorities reported that more than 90 per cent of all heroin seized in China had entered the country from Myanmar. 30 The amount seized in the Asia-Pacific region followed an increasing trend in the period 2008–2015, from about 5.5 tons to 13 tons. Countries including Australia, Malaysia, Myanmar, Thailand and Viet Nam reported sharp increases over that period. In recent years, the amount seized in the region has stabilized, reaching 12.6 tons in 2017. While the amount seized in Australia has decreased significantly in the past three years to approximately 250 kg, in South-East Asian countries such as Malaysia, Myanmar, Thailand and Viet Nam, it has remained high, reaching 603 kg, 570 kg, 599 kg and 907 kg, respectively, in 2017. In 2018, Malaysia and Myanmar reported increases in seizures of approximately 50 per cent, from 603 and 571 tons to 1,141 and 1,099 tons, respectively.

Figure X
Heroin seizures worldwide and in selected countries and regions (2006–2018)^a (Kilograms)



- ^a Data for 2018 are preliminary.
- ^b The Golden Crescent includes Afghanistan, the Islamic Republic of Iran and Pakistan.
- ^c 2018 heroin seizure data from China were not available at the time of writing.
- 45. Seizures of heroin originating in Afghanistan are increasingly concentrated in the Golden Crescent (Afghanistan, Iran (Islamic Republic of) and Pakistan). While those countries accounted for less than 30 per cent seized outside the Americas and the Asia-Pacific region in 2003 and 2004, the proportion has increased steadily over the past decade, reaching almost 70 per cent in recent years. The increase is mostly the result of sharp increases in the amount seized in Iran (Islamic Republic of) and Pakistan, from a total of 8 tons in both countries in 2004 to more than 48 tons in 2017. In 2018, the Islamic Republic of Iran reported a 7 per cent increase in the amount seized in that country, from 23.7 tons to 25.4 tons.
- 46. Seizures along the northern heroin route originating in Afghanistan accounted for about 25 per cent of global seizures outside the Americas and the Asia-Pacific region in 2004, but that proportion decreased gradually, to less than 5 per cent in 2016 and 2017. In 2017, having reported seizing less than 500 kg of heroin for the first time since 1998, the Russian Federation reported 721 kg seized in 2018.

³⁰ UNODC, annual report questionnaire submitted by China for 2016.

- 47. The most commonly used route for transporting Afghan heroin into Europe continues to be the Balkan route, with large amounts seized in Iran (Islamic Republic of) and Turkey. Iranian authorities reported that 85 per cent of seizures in 2018 had entered the country through Pakistan and 15 per cent through Afghanistan, while 75 per cent was being trafficked onwards to Turkey and the Caucasus. The amount seized in South-Eastern Europe reached record levels in 2018, with 21.4 tons, more than triple the 6.4 tons reported in the region in 2016. In 2016, after reaching the lowest value since 2003, 5.6 tons, the amount seized in Turkey continued to increase, with a record 18.5 tons in 2018.
- 48. The amount of heroin seized in Western and Central Europe shows a decreasing trend, falling from 11.6 tons in 2000 to 3.9 tons in 2016, the lowest level on record since 1990. However, in 2018, the total amount seized in that region increased 4.9 tons to 8.5 tons, owing mainly to increases in Belgium, France and Italy, where 4,537 kg, 1,115 kg and 975 kg were seized, respectively.
- 49. Significant trafficking routes are developing in various regions in Africa. ³² In Egypt, record amounts of heroin have been seized in recent years, with an average of 730 kg seized every year since 2015, and a record 856 kg in 2017. Kenya reported almost 1,500 kg seized in 2018, five times the previous year's seizures in that country. Nigerian authorities reported that most heroin trafficked in the country had arrived from South Africa and Kenya. ³³
- 50. In the Americas, the amount of heroin seized more than doubled between 2007 and 2010 and remained stable until 2013 before increasing in recent years. After reaching a record 10.9 tons in 2015, the amount seized in the region remained high, at 9.5 tons in the period 2015–2018, owing mostly to significant amounts seized by the United States. Mexico is the main source and Colombia the secondary source of heroin trafficked in the United States. While seizures in the United States amounted to almost 9 tons in 2018, Colombia and Brazil reported seizing 329.5 kg and 100 kg, respectively.

C. Cocaine

- 51. The main consumer markets for cocaine, North America and Western and Central Europe, continue to be supplied by cocaine originating in South America. Therefore, global seizures are concentrated in those regions (see figure V). In line with the sharp increase in coca bush cultivation and potential cocaine manufacture in the Andean region, the amount of cocaine seized globally has increased sharply in recent years, from about 650 tons in 2014 to more than 1,014 tons in 2018 (see figure XI).
- 52. While source and transit regions accounted for less than 55 per cent of the cocaine seized globally during the early 2000s, that proportion has varied between 70 per cent and 75 per cent since 2008. After reaching a peak of 748 tons in 2017, seizures in South America decreased to 656 tons in 2018. The amount seized in Colombia more than doubled between 2014 and 2018, from 191 tons to 458 tons. The amount seized in Brazil reached a record 79 tons in 2018, up from a reported 48 tons in 2017.

³¹ UNODC, annual report questionnaire submitted by the Islamic Republic of Iran for 2018.

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³² Ibid.

³³ UNODC, annual report questionnaire submitted by Nigeria for 2018.

³⁴ United States, Department of Justice, Drug Enforcement Administration, 2018 National Drug Threat Assessment (October 2018).

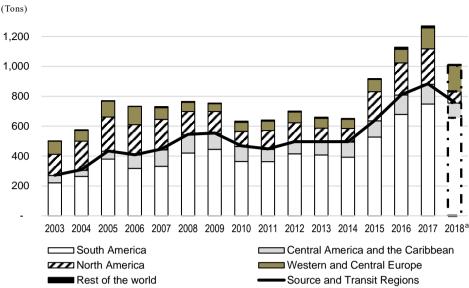


Figure XI Global seizures of cocaine (base, paste and salts), by region (2003–2018)^a

^a Data for 2018 are preliminary.

- 53. In 2017, Denmark, Italy, the Russian Federation, Sweden and Switzerland listed Central America and the Caribbean, in particular Costa Rica, the Dominican Republic and Panama, as transit and departure points for the cocaine seized by their authorities. Those three countries reported seizing the largest amounts in the region in recent years. The amount seized in Panama and Costa Rica remained at record levels in 2018, at 54 tons and 27.6 tons, respectively. El Salvador reported seizing 13.7 tons in 2018. As a result, the cocaine seized in Central America and the Caribbean in 2018 amounted to 100 tons.
- 54. The amount of cocaine seized in North America has increased every year since 2015, and has more than doubled in recent years, from about 91 tons in 2014 to more than 223 tons in 2017, owing mostly to an increase in the United States. The amount reported in the United States declined from 223 tons in 2017 to 60 tons in 2018, a 73 per cent decrease compared with 2017. National authorities estimate that at least 93 per cent of the cocaine trafficked to the United States mainland is of Colombian origin, while 4 per cent originates in Peru. ³⁵ According to the United States authorities, ³⁶ 39 per cent of cocaine salt entered the country from Mexico, 8 per cent from the Bolivarian Republic of Venezuela and 5 per cent from Haiti. In Mexico, the amount of cocaine seized in 2018 increased to 16.5 tons.
- 55. The amount of cocaine seized in Western and Central Europe peaked at 121 tons in 2006, then declined to an average of 62 tons between 2008 and 2014. Since then, the amount seized in the region has more than doubled, reaching a record 173 tons in 2018. In recent years, the increasing use of maritime containers to smuggle cocaine appears to have become a major threat. As a result, seizures in the region have shown a geographical shift, from the Iberian Peninsula to Belgium and the Netherlands, in recent years. In 2018, for the third consecutive year, Belgium seized the largest amount of cocaine in Europe, with 53 tons, a 19 per cent increase compared with the 45 tons reported in 2017. The amount seized in the Netherlands reached a second record value of 25.5 tons in 2018, the highest value on record since 2003. After falling in 2016 to the lowest level since 2000, at 16 tons, the amount seized in Spain further increased sharply in 2018, reaching 48.4 tons.
- 56. A secondary route for cocaine trafficked across the Atlantic Ocean to Europe involved countries in West Africa as transit points. Countries in West Africa have

35 DEA, 2018 National Drug Threat Assessment.

³⁶ UNODC, annual report questionnaire submitted by the United States for 2018.

reported seizing large amounts in recent years, with Nigeria recording more than 90 kg every year since 2003, Benin seizing an average 173 kg during the period 2014–2017, and Ghana seizing a total of 1.4 tons during the period 2013–2018. One development of concern is the use of cannabis routes in North Africa and heroin routes in East Africa to traffic cocaine. ³⁷ Egypt reported seizing a record 532 kg of cocaine in 2014, and Morocco reported seizing record amounts of 2,837 kg in 2017 and 1,691 kg in 2018.

57. In most parts of Eastern Europe, South-Eastern Europe, Asia and Oceania, the availability of cocaine remains limited compared with other types of drugs. During the past two years, significant amounts were reported seized by Australia (4,142 kg in 2017), Turkey (1,509 kg in 2018) and Saudi Arabia (519 kg in 2017).

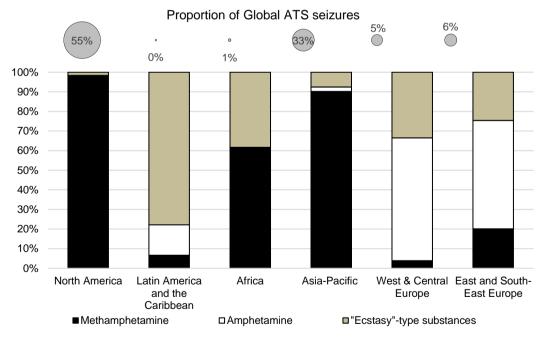
D. Amphetamine-type stimulants

- 58. Unlike the collection of seizure data for plant-based drugs, the collection of high-quality seizure data relating to amphetamine-type stimulants heavily depends on the proper identification and classification of seized controlled substances.
- 59. As shown in figure XII, the two regions in which the largest total amounts of amphetamine-type stimulants seized in 2018 were North America and the Asia-Pacific region, two main markets for methamphetamine worldwide (see figure V). Countries in Europe also reported seizing significant amounts of amphetamine-type stimulants, accounting for a large portion of the global "ecstasy" market (see figure XII), with no major differences in terms of distribution between Western and Central Europe (5 per cent) and Eastern and South-Eastern Europe (6 per cent).

Figure XII

Proportion of amphetamine-type stimulant seizures, by region and drug type (2018)^a

(Percentage)



^a Data are preliminary.

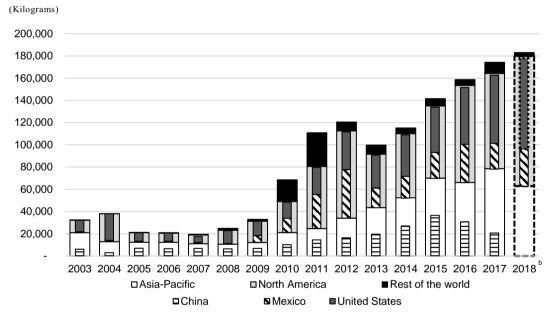
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³⁷ EMCDDA and Europol, *EU Drug Markets Report: Strategic Overview* (Luxembourg, Publications Office of the European Union, 2016).

Methamphetamine

- 60. The Asia-Pacific region and North America account for most of the methamphetamine seized globally, and the illicit manufacture of methamphetamine has traditionally been concentrated close to those two consumer markets. However, it has recently spread to other countries and regions, with reports of it being smuggled from other regions, such as Africa, Europe and South-West Asia during the period 2012–2015.³⁸ The amount seized globally reached record levels between 2015 and 2018 (see figure XIII).
- 61. In North America, the amount of methamphetamine seized reached a record 117 tons in 2018. The amount of methamphetamine seized in the United States reached the highest level on record for the fifth year in a row in 2018, at 82 tons, a 33 per cent increase compared with 2017. National authorities reported that domestic manufacture had been decreasing in the United States since 2004, with most of the methamphetamine trafficked within the country being manufactured in Mexico and smuggled across the south-western border. After increasing sharply to 35 tons in 2016, the amount seized in Mexico in 2018 decreased to 33 tons. Methamphetamine is produced in the country using precursors imported by sea mainly from China, Japan and Singapore.

Figure XIII Global seizures of methamphetamine, by region (2003–2018)^a



^a Data for 2018 are preliminary.

62. In the Asia-Pacific region, the amount of methamphetamine seized has been increasing almost every year since 2008, with the exception of 2016 and 2018. In East and South-East Asia, it is trafficked in tablets and in crystalline form; tablets are manufactured and trafficked mostly within the Mekong subregion, and crystalline methamphetamine trafficking is spread throughout the region. ⁴¹ The Greater Mekong subregion countries accounted for about 75 per cent of the total crystalline

^b At the time of writing, the seizure data from China were not available.

³⁸ UNODC, Global Synthetic Drugs Assessment: Amphetamine-type Stimulants and New Psychoactive Substances (Vienna, 2017).

³⁹ DEA, 2018 National Drug Threat Assessment.

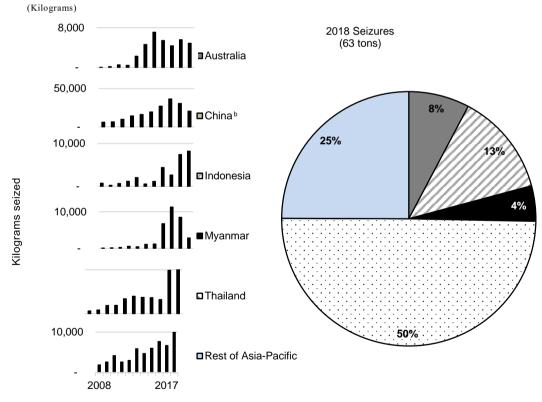
⁴⁰ UNODC, annual report questionnaire replies submitted by Mexico for 2017.

⁴¹ UNODC, The Challenge of Synthetic Drugs in East and South-East Asia and Oceania: Trends and Patterns of Amphetamine-type Stimulants and New Psychoactive Substances — A Report from the Global SMART Programme (May 2015).

methamphetamine seizures between 2011 and 2015.⁴² The high prices of crystalline methamphetamine in some countries such as Australia, Japan, New Zealand and the Republic of Korea may be a key driver of the increased manufacture observed in China and South-East Asia in recent years.⁴³

- 63. The amount of methamphetamine seized in China increased every year between 2008 and 2015, from 6 tons to more than 36 tons and at an average level of 18 tons. After remaining above 30 tons in 2015 and 2016, the amount seized in China decreased sharply, to under 21 tons in 2017. ⁴⁴ A total of 63 tons of methamphetamine was seized in the Asia-Pacific region in 2018, although that figure does not include the most recent seizure data from China (see figure XIV). In 2018, Thailand reported another record seizure amount, of 31 tons. Indonesia also reported seizing a record amount in 2018, of 8.2 tons, while the amount seized in Australia decreased by 12 per cent, to 4.9 tons, and Myanmar reported very sharp decrease of 67 per cent, seizing 2.8 tons.
- 64. Chinese authorities reported that in 2017, efforts were made to crack down on crimes related to illicit drug production, in particular the illicit production of synthetic drugs such as methamphetamine. ⁴⁵ As a result of those efforts, domestic illicit drug production in China declined and moved from key areas such as Guangdong and Fujian to other regions, making it more difficult for law enforcement officials to seize those products.

Figure XIV Geographical distribution of methamphetamine seizures in the Asia-Pacific region in 2018, and annual seizures in selected countries (2008–2018)^a



^a Data for 2018 are preliminary.

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^b Data for China are from 2017.

⁴² UNODC, The Challenge of Synthetic Drugs in East and South-East Asia: Trends and Patterns of Amphetamine-type Stimulants and New Psychoactive Substances — A Report from the Global SMART Programme (June 2017).

⁴³ Ibid.

⁴⁴ At the time of writing, 2018 seizure data from China were not available.

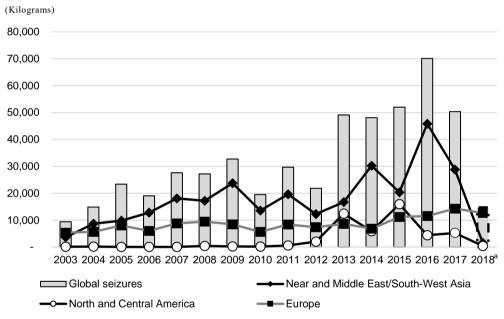
⁴⁵ Country report submitted by China to the Forty-second Meeting of Heads of National Drug Law Enforcement Agencies, Asia and the Pacific.

65. Outside the two main markets, significant amounts of methamphetamine are often reported seized by the Islamic Republic of Iran. Iranian authorities reported seizing an average 2.7 tons in the period 2010–2018 (2.9 tons in 2018) and detecting 141 clandestine laboratories in 2017 alone. During the past two years, significant amounts were also reported seized in Bangladesh (3,607 kg in 2017), the Russian Federation (1,131 kg in 2017) and Turkey (566 kg in 2018).

Amphetamine

66. Since 2004, global amphetamine seizures have been concentrated in the Near and Middle East and South-West Asia (see figure XV). The amounts seized in several countries in the Near and Middle East have increased notably over the past decade, with amphetamine being trafficked almost exclusively in "captagon" tablet form. At the time of writing, the majority of Member States in the Near and Middle East had not provided 2018 data on seizures in the region. In South-West Asia, the amount seized has increased in recent years as well, with Pakistan reporting record levels between 2015 and 2017, with an annual average of 2.9 tons during that period.

Figure XV Global seizures of amphetamine, by region (2003–2018)^a



^a Data for 2018 are preliminary and do not include Jordan, as no information was available for that country at the time of writing.

67. In Western and Central Europe, the amount of amphetamine seized has remained relatively stable since 2005, totalling 6.2 tons in 2018, a 9 per cent decrease compared with 2017. While 2018 seizure data from Germany were not available at the time of writing, the country has consistently reported between 1,000 kg and 1,700 kg every year since 2008. The amount seized in the United Kingdom of Great Britain and Northern Ireland returned to the previous level of 1.7 tons in 2018, after declining to 561 kg in 2015. Large-scale production of amphetamine in the region remains concentrated in the Netherlands and to a lesser extent Belgium. ⁴⁶ Greece reported seizing 791 kg in 2018, a sharp increase from the 165 kg reported in 2017, and Poland reported a record 1,323 kg in 2018, an increase of more than 100 per cent from 633 kg in 2017. In recent years, there has been an increase in amphetamine trafficking in South-Eastern Europe, with Turkey reporting the seizure of a record 5.8 tons in 2018, the second largest amount (after Italy) reported by a country in Europe in that year.

⁴⁶ EMCDDA and Europol, EU Drug Markets Report 2019.

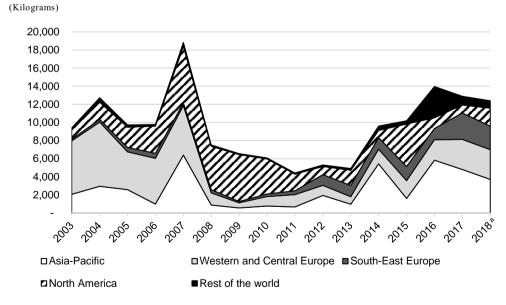
- 68. In recent years, there has been an increased presence of amphetamine in the Americas, in particular in North and Central America (see figure XV). The United States has reported seizing an average of 5.9 tons annually since 2013. In 2018, there was a sharp decrease to 388 kg.
- 69. There has also been a recent increase in the amount of amphetamine seized in Africa. While seizures in the continent were around 4.2 tons in the last three years, 2018 seizure figures reported to UNODC were significantly lower at the time of writing, mainly because seizure data from some Member States were not available.

"Ecstasy"-type substances

70. In comparison with 2017, the amount of "ecstasy"-type substances seized globally in 2018 decreased 4 per cent (12.393 kg). ⁴⁷ The trend in seizures remained very close to the high levels reported in 2017 (12.889 kg), owing mainly to increases in North America, which almost offset the declines observed in the Asia-Pacific region (see figure XVI). It has been considered in recent years that the Asia-Pacific region might be becoming an emerging driver of the global market for "ecstasy". ⁴⁸ Other countries, in particular Turkey, have also seen sharp increases in the amounts of "ecstasy"-type substances seized in recent years. In 2018, 88 per cent of such seizures in South-East Europe took place in Turkey.

According to preliminary data for 2018, 3,4-methylenedioxymethamphetamine (MDMA) seized in Australia decreased to 1,551 kg in 2018. The amount of "ecstasy"-type substances seized in Western and Central Europe, having witnessed a significant increase, from 817 kg in 2013 to 3.3 tons in 2017, remained stable (3.3 tons seized in 2018). In 2018, 1,979 kg were seized in North America, a significant increase of 121 per cent compared with the previous year, which was mainly the result of an increase in the amounts seized in the United States. In 2018, the amount of MDMA seized in Turkey reached a record 2.9 tons, the second-highest value reported by any country that year. Turkey reported an average of more than 1.5 tons each year between 2012 and 2018, up from 676 kg during the period 2002–2011.

Figure XVI Global seizures of "ecstasy"-type substances, by region (2003–2018)^a



^a Data for 2018 are preliminary.

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⁴⁷ 2018 data are preliminary.

⁴⁸ UNODC, The Challenge of Synthetic Drugs in East and South-East Asia and Oceania (May 2015).

IV. Conclusions

- 72. 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, the amount of cannabis herb seized decreased in 2016, 2017 and 2018 compared with the levels observed in 2015 and earlier years.
- 73. After reaching unprecedented levels in 2017, preliminary data indicate that global opium poppy cultivation decreased in 2018, albeit remaining at higher levels than those observed previously. Global seizures of opium and illicit morphine remain concentrated in Afghanistan and neighbouring countries, while heroin seizures cover a wider geographical area. The amount of heroin seized globally has followed an increasing trend since 2013, and 2018 preliminary data suggest a decrease from record levels to 78 tons.
- 74. After reaching historically low levels in 2013, the total area under coca bush cultivation has increased every year since, driven mostly by sharp increases in Colombia. The amount of cocaine seized globally decreased to 1,013 tons in 2018.
- 75. The number of amphetamine-type stimulants seized has reflected a sharp decrease, to 2004 levels (14.8 tons), although data from some Member States are missing. The Asia-Pacific region and North America account for most of the methamphetamine seized globally, and its illicit manufacture has traditionally been concentrated close to those two consumer markets. While the amount of methamphetamine seized globally increased sevenfold between 2008 and 2018, the amount of amphetamine and "ecstasy"-type substances reported seized globally since 2014 is significantly higher than that observed a decade ago. In 2018, the trend in seizure of "ecstasy"-type substances remained close to the high levels reported in 2017.