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Drug Law Enforcement Agencies, Europe**

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Item 3 of the provisional agenda**

**Current situation with respect to regional and
subregional cooperation****Statistics on drug trafficking trends in Europe and
worldwide***Summary*

The present report provides an overview of the latest trends in the illicit production of and trafficking in drugs worldwide, with a focus on Europe. 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.

Europe continues to account for significant proportions of global seizures of cannabis resin, cocaine, heroin and amphetamine-type stimulants, especially amphetamine and “ecstasy”-type substances. While cannabis resin and cocaine seizures are almost exclusively concentrated in Western and Central Europe, the eastern and south-eastern parts of the continent account for significant portions of the heroin and amphetamine-type stimulants seized in the region.

While in recent years there has been a substitution of cannabis resin with cannabis herb in Western and Central Europe that resulted in an increased proportion of herb being seized relative to resin, in 2015 cannabis herb seizures in the region decreased significantly for the first time since 2009. Cocaine seizures increased notably in 2015 with respect to previous years, while heroin seizures decreased significantly in both the south-eastern and western/central part of the continent. In South-Eastern Europe, seizures of amphetamine and “ecstasy”-type substances reached record levels in 2015.

* Available only in English, French, Russian and Spanish, which are the working languages of the subsidiary body.

** UNODC/HONEURO/12/1.



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, with a particular focus on trends within Europe. The analysis includes information available to the United Nations Office on Drugs and Crime (UNODC) up to March 2017.
2. Section II addresses the illicit cultivation and production of plant-based drugs for the years up to and including 2015 and, where available, 2016. With regard to drug trafficking, section III 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 (ATS).
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. At the time of writing, UNODC had received replies to part IV of the 2015 annual report questionnaire from 98 Member States and two territories, including 39 countries from Europe. 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 40 States and territories in Europe.
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 hectares (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 and a decrease in the production of cannabis resin, which amounted to 700 tons (down from 3,040 tons in 2003).

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).

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 villages take part in cannabis cultivation.³

10. Cultivation of marihuana, both indoors and outdoors, continues to be present in Europe. In 2015, 13 European countries reported eradicating marihuana cultivation sites in their responses to part IV of the annual report questionnaire. Additionally, authorities from the Russian Federation estimated total national production at 29 tons of *fresh* cannabis herb.⁴

B. Opium poppy cultivation

11. At the time of writing, information for 2016 was only available for Afghanistan. Afghanistan and Myanmar continue 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 the decrease in Afghanistan. The decline in Afghanistan was temporary since opium poppy cultivation in the country bounced back in 2016, increasing by 10 per cent with respect to 2015.

12. In 2015, Opium poppy cultivation in Afghanistan decreased to 183,000 ha after reaching record levels in 2014 of 224,000 ha.⁵ The vast majority of the cultivation (90 per cent) took place in the southern and western regions of the country, where significant decreases were recorded. In 2016,⁶ cultivation in the country increased again, reaching 201,000 ha. Sharp increases were recorded in the eastern and northern regions of the country, which represented a combined 13 per cent of total national cultivation, up from 8 per cent in 2015. The number of poppy-free provinces decreased in both 2015 and 2016.

13. In 2015, potential opium production in Afghanistan reached 3,300 tons, the lowest level since 2001. This decline was not only due to the fall in the area under cultivation, but also a consequence of a sharp decrease in the yield due to adverse weather conditions, from 28.7 kg per ha in 2014 to 18.3 in 2015, the lowest level on record. In 2016, the aforementioned increase in cultivation and a higher yield of 23.8 kg per ha resulted in an increase in potential opium production of 43 per cent with respect to the previous year, reaching 4,800 tons. Despite the increase, the yield recorded in 2016 is still the third-lowest value on record in Afghanistan.

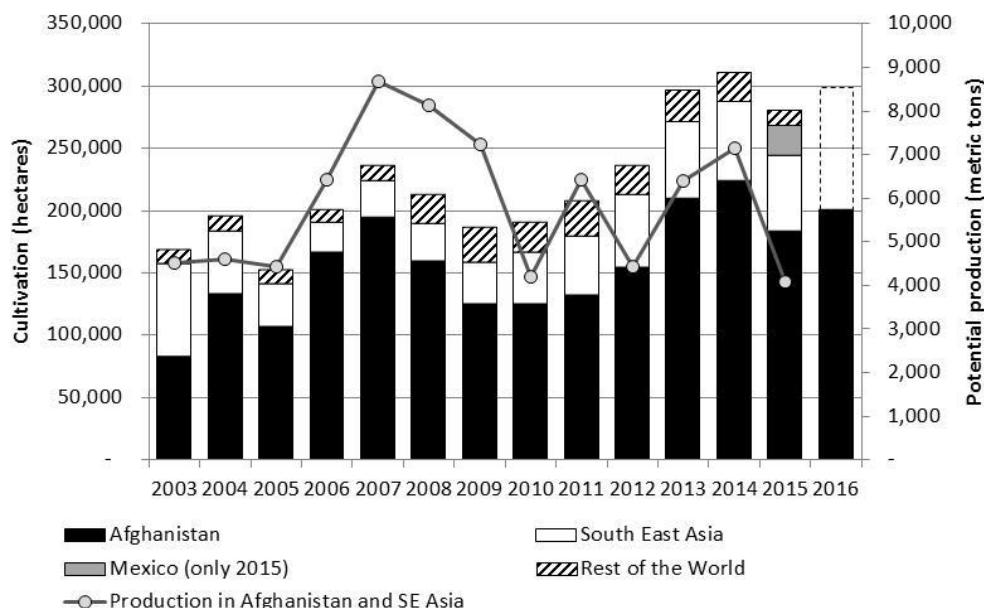
³ UNODC and Ministry of Counter Narcotics of Afghanistan, *Afghanistan Opium Survey 2015* (Vienna, March 2016).

⁴ Russian Federation, 2015 Annual Report Questionnaire responses.

⁵ *Afghanistan Opium Survey 2015*.

⁶ UNODC and Ministry of Counter Narcotics of Afghanistan, *Afghanistan Opium Survey 2016: Executive Summary* (Vienna, October 2016).

Figure I

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

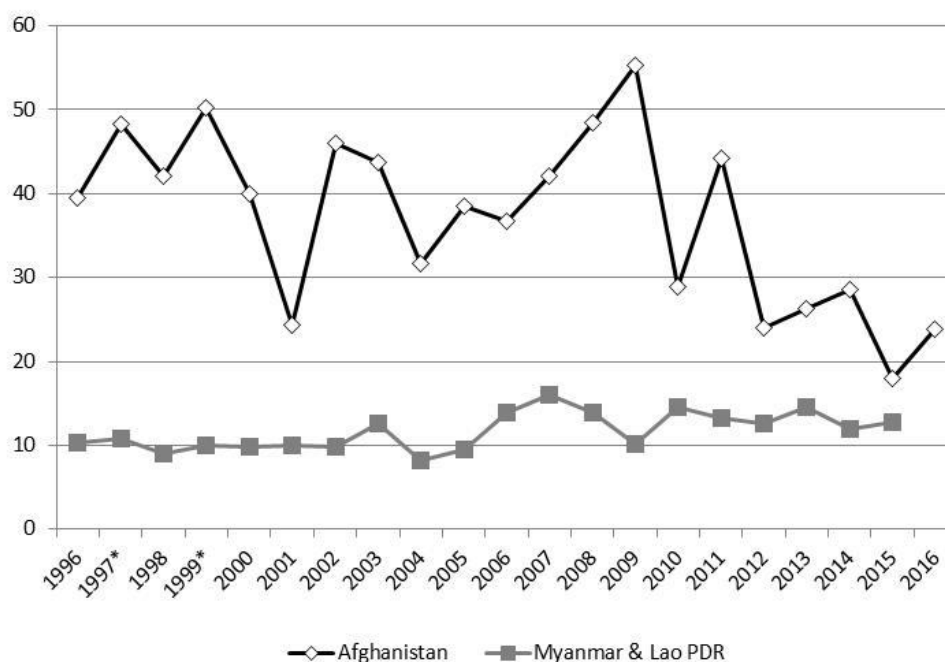
^a Only the cultivation in Afghanistan was available at the time of writing for 2016.

14. The *South-East Asia Opium Survey 2015* estimated that 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.

15. 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 has traditionally been notably lower than in Afghanistan. However, the yield in Afghanistan has declined notably since 2009 and was similar to that observed in South-East Asia in 2015 (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 2014, when production reached 762 tons.

16. Almost 87 per cent of global opium poppy cultivation in 2015 took place in Afghanistan and South-East Asia. According to the first *Mexico Opium Survey*, carried for the 2014-2015 period by UNODC and the Government of Mexico, the area under opium poppy cultivation in the country between July 2014 and June 2015 was estimated at 24,800 ha, which represents about 9 per cent of global cultivation. During 2015, Mexican authorities reported the eradication of 25,960 ha of opium poppy, a 21 per cent increase with respect to 2014 (21,445 ha) and a 77 per cent more than in 2013 (14,662 ha).

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



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

17. While the cultivation of opium is not prevalent in Europe, Greece, the Russian Federation and Ukraine reported the eradication of opium poppy plants in 2015 for a combined total of almost 300,000 plants. Russian authorities estimated domestic production at 13.4 tons of fresh opium.⁷

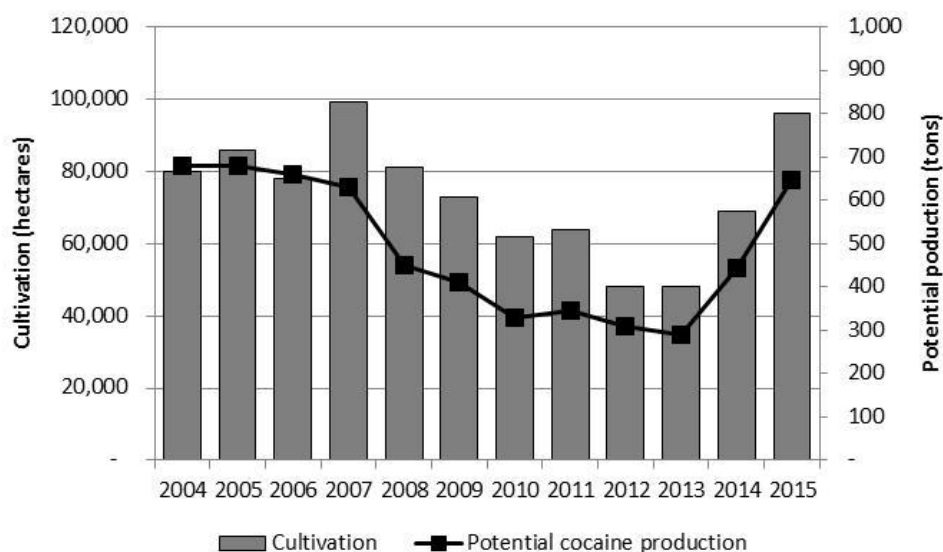
C. Coca cultivation

18. 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 1980's. This was due mainly to a sharp increase of almost 40 per cent in Colombia.

19. After reaching historically low levels (48,000 ha) in 2013, the *Coca Cultivation Survey 2015*, conducted jointly by the Government of Colombia and UNODC, showed that coca bush cultivation in Colombia doubled in two years, reaching 96,000 ha in 2015, the highest value since 2007. Potential cocaine production in Colombia increased sharply to 646 tons in 2015 after reaching 290 metric tons in 2013, the lowest value since the mid-1990's (see Figure III). During 2015, the Colombian authorities destroyed a total of 3,591 laboratories for the extraction of coca paste or cocaine base (64 per cent increase with respect to 2014), as well as 236 cocaine hydrochloride laboratories (45 per cent increase).

⁷ Greece, Russian Federation and Ukraine, 2015 Annual Report Questionnaire responses.

Figure III

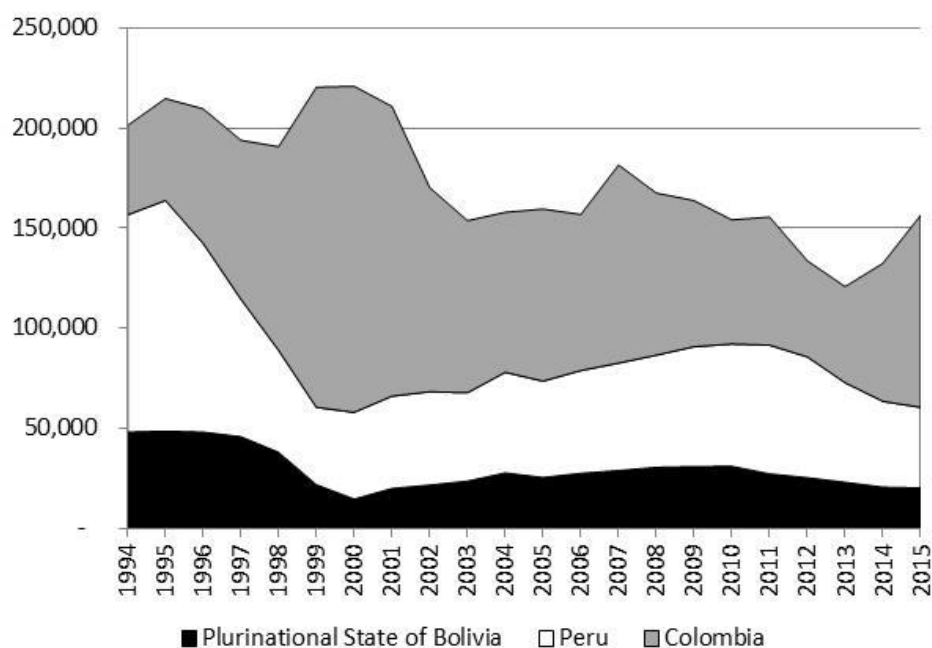
Coca bush cultivation and potential cocaine production in Colombia (2004-2015)

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. 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. 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, while the number of cocaine hydrochloride laboratories destroyed by the authorities has increased notably since 2008, when 7 laboratories were destroyed, reaching 74 in 2014 and 73 in 2015.

21. 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 6 per cent decrease compared with 2014 (42,900 ha), and the lowest level recorded since 1999. The production of dried coca leaf in Peru was estimated at 96,300 tons in 2015, of which 9,000 were destined for traditional consumption. Eradication increased by more than 15 per cent compared with 2014, reaching a record 35,900 ha. Authorities reported⁸ that the State's eradication efforts in recent years had caused drug-trafficking organizations to shift illicit cultivation to increasingly scattered and isolated areas.

⁸ Country report submitted by Peru to the Twenty-sixth Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean.

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



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. According to data from responses to the annual report questionnaire for 2015, several countries in Latin America, including Argentina, Brazil, Chile, Ecuador and Honduras, reported the detection of clandestine laboratories processing coca leaf derivatives. Some of these facilities have also been detected in Europe. In 2015, Spain, Portugal and Greece reported the detection of such laboratories.

III. Global trends in illicit drug trafficking and seizures

23. Table 1 shows the quantities of the major drug types seized reported to UNODC globally and within Europe in 2014 and 2015, and the estimated trend in 2015.

Table 1
Drug seizures and trends in Europe and worldwide, 2014 and 2015

Drug Type	Europe			Global Seizures	
	2014 (Tons)	2015	Trend ^(a,b)	2014 (Tons)	2015
Cannabis herb	352	174	Decrease (-54%)	5,877	5,676
Cannabis resin	613	549	Decrease (-11%)	1,440	1,506
Cocaine ^c	62.5	83.6	Increase (+34%)	655	850
Heroin	25.1	16.7	Decrease (-34%)	81.7	80.1
Opium	0.4	4.8	Increase	526	587
Illicit morphine	< 0.1	< 0.1	N/A	20.9	9.6

Drug Type	Europe			Global Seizures	
	2014	2015	Trend ^(a,b)	2014	2015
	(Tons)			(Tons)	
Amphetamine	6.7	10.9	Increase (+16%)	46.4	> 51.8 ^d
Methamphetamine	0.8	1.0	Increase (+47%)	108.7	131.5
“Ecstasy”	2.9	3.7	Increase (+28%)	9.4	6.2

^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.

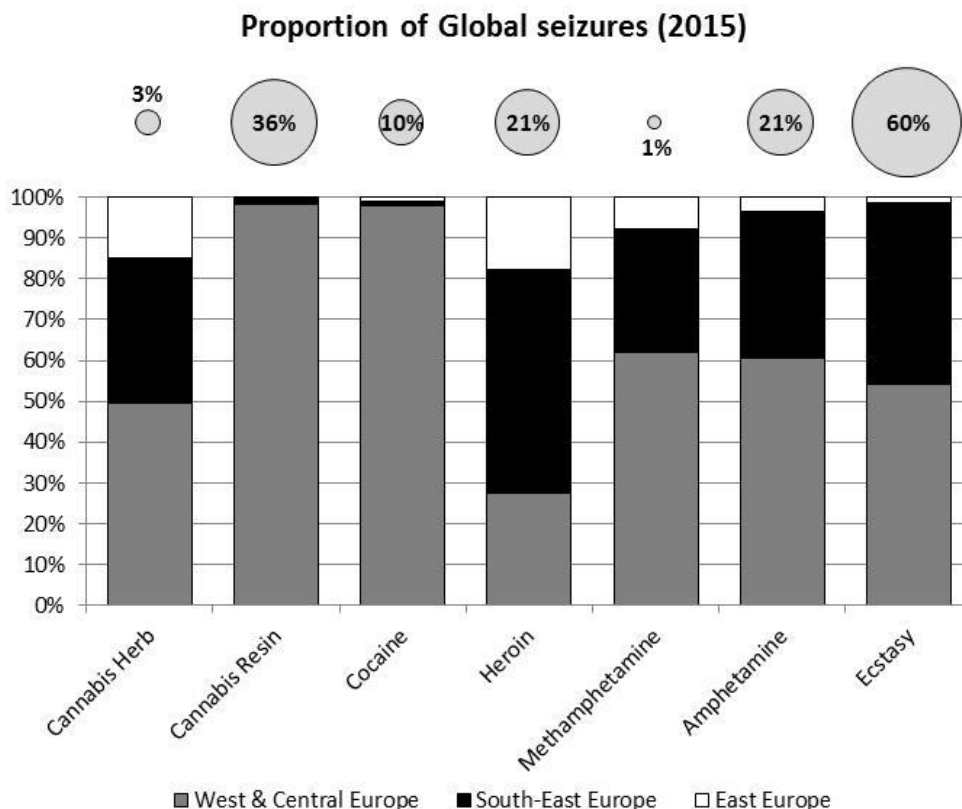
^c Includes base, pastes, salts and “crack” cocaine.

^d Data for amphetamine seizures in 2015 were incomplete. However, preliminary data suggest that reported seizures amounted to at least 51.8 tons.

24. Europe accounts for significant proportions of global seizures of cannabis resin, cocaine, heroin, amphetamine and “ecstasy”-type substances. While cannabis resin and cocaine seizures within the region are almost exclusively concentrated in Western and Central Europe, South-Eastern Europe represents between 30 and 50 per cent of European seizures of cannabis herb and amphetamine-type stimulants. This subregion also accounted for over 50 per cent of heroin seizures that took place in Europe in 2015. East Europe represented between 10 and 20 per cent of cannabis herb and heroin European seizures in 2015.

Figure V

Geographical distribution of European drug seizures and proportion of global seizures that occurred in Europe, by drug type (2015)
(Percentage)

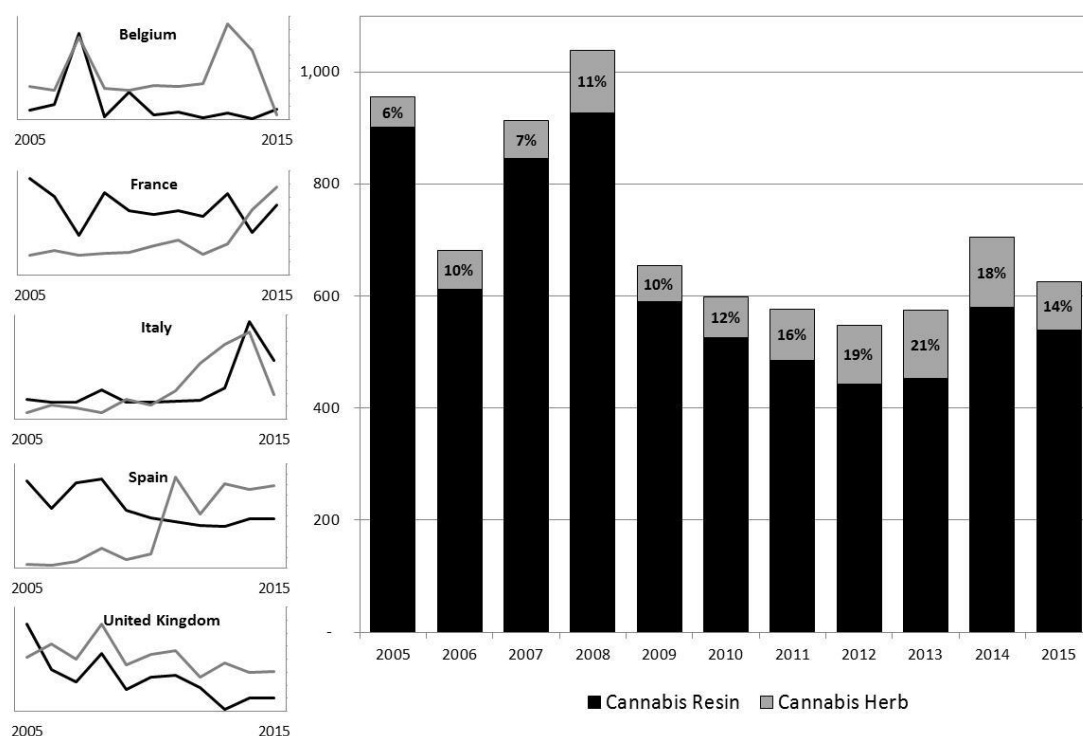


A. Cannabis

25. Cannabis in its resin form has traditionally been more prevalent than herb in Western and Central Europe. Over the last decade, increased production of cannabis herb in the European Union has resulted in a shift in the market, with domestic herbal products partially displacing imported cannabis resin.⁹ As a result, cannabis herb seizures have accounted for an increasing proportion of total cannabis seizures in Western and Central Europe in recent years. As seen in Figure VI, this trend can be observed in many countries reporting significant cannabis seizures within the region, with Spain, France and Belgium showing increasing herbal seizures and decreasing resin seizures over the last ten years. While in Italy both cannabis herb and resin seizures have increased in recent years, the United Kingdom of Great Britain and Northern Ireland shows a decreasing trend in seizures of both forms of cannabis, albeit more pronounced for cannabis resin. In 2015, there was a change in the trend, with sharp decreases in cannabis herb seizures all over the region, and a moderate decline in resin seizures.

Figure VI

Cannabis herb and resin seizures in Western and Central Europe (2005-2015)
(Tons)



⁹ EMCDDA, *EU Drug Markets Report: Strategic Overview*, 2016.

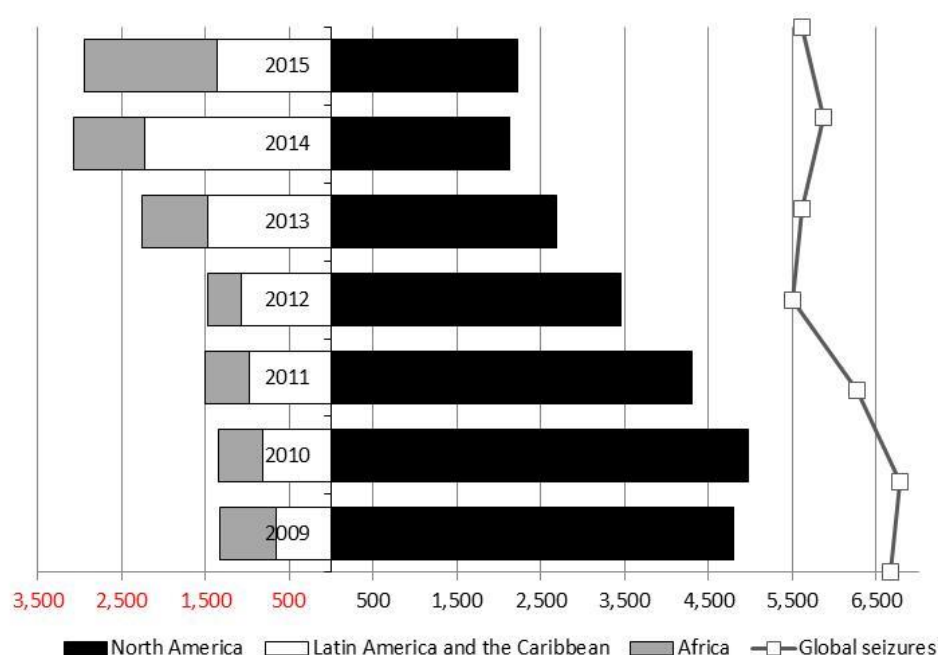
Cannabis herb

26. Even though cannabis herb seizures occur in almost every corner of the globe, the Americas have represented more than 60 per cent of global seizures every year since the early 1990s. While North America has traditionally accounted for most of these seizures, there has been a shift towards Latin America and the Caribbean since 2011 (see Figure VII). In 2015, global cannabis herb seizures remained stable, with changes in the recent trends observed in North America, Latin America and the Caribbean and Western and Central Europe.

27. As seen in Figure VII, cannabis herb seizures in North America have been decreasing sharply since 2010. In 2015, preliminary data indicate that seizures in the subregion remained stable, mainly due to 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 recorded the highest cannabis herb seizures reported 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 states with legalized cannabis herb.¹⁰

Figure VII

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



^a Data for 2015 are preliminary.

28. Unlike North America, cannabis herb seizures in Latin America and the Caribbean increased sharply between 2009 and 2014, from 650 to over 2,000 tons. In 2015, data suggest that cannabis herb seizures in the region decreased to less than 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 about 1,300 tons in 2015, according to preliminary data, owing mainly to a decline in Paraguay from 711 to 510 tons.

29. Between 2009 and 2014 cannabis herb seizures in Western and Central Europe have nearly doubled, from 65 to 125 tons (see Figure VIII), as a consequence of the aforementioned increased prevalence of domestic herbal products in the region. In 2015, however, cannabis herb seizures in the region decreased sharply to under

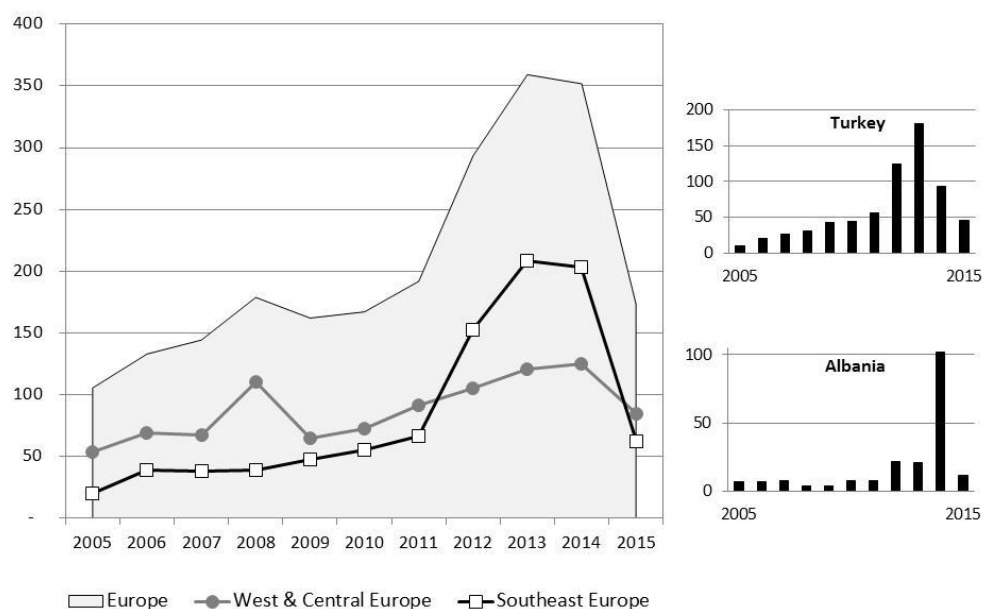
¹⁰ United States of America, 2015 Annual Report Questionnaire response.

87 tons, owing mainly to sharp reductions in Belgium (764 kg seized, down from 10,744 in 2014), Greece (2.5 tons, down from 19.6) and Italy (9 tons, down from 33). Italy and Greece were the two countries with the highest cannabis herb seizures in the subregion between 2012 and 2014. In 2015, Spain and the United Kingdom reported the highest seizures in the subregion, reaching about 15 tons each for the second consecutive year. In France, cannabis herb seizures reached 10 and 13.6 tons in 2014 and 2015 respectively, the highest levels on record since the early 1980s.

30. As seen in Figure VIII, cannabis herb seizures in South-Eastern Europe increased sharply during the 2012-2014 period, as a consequence of unprecedented levels in Turkey in 2012 and 2013, and Albania in 2014. In 2015, however, cannabis herb seizures in the subregion decreased to previous levels mainly due to declines in these two countries. The production and trafficking of cannabis herb is an area of growing concern for European law enforcement agencies because of the increasing involvement of organized crime in the region.¹¹

Figure VIII

Cannabis herb seizures in Europe and selected countries (2005-2015)
(Tons)



31. 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 and Europe. While information on cannabis herb seizures in the region is limited,¹² certain countries with high levels of reported seizures like Egypt, Morocco and Nigeria, have consistently responded to part IV of the annual report questionnaire, and all show increasing trends in recent years. In Nigeria, cannabis herb seizures have oscillated between 100 and 350 tons during the 2005-2014 period, and reached a record 871 tons in 2015, the highest level reported by a single country that year outside of North America.

¹¹ European Monitoring Centre for Drugs and Drug Addiction, *European Drug Report: Trends and Developments 2015* (Luxembourg, 2015).

¹² At the time of writing, 8 African countries had reported cannabis herb seizures in their annual report questionnaire for 2015.

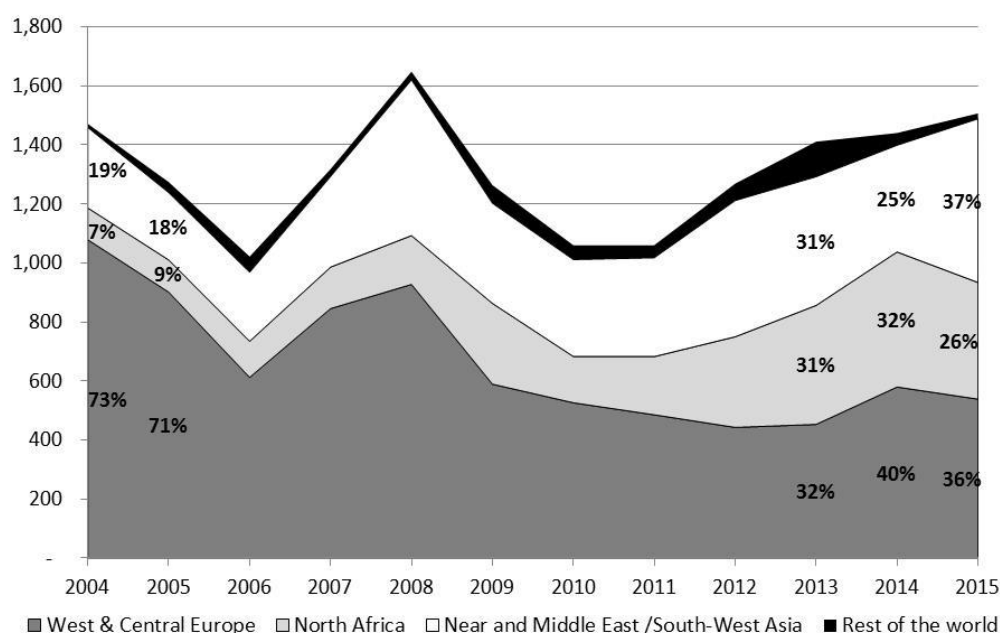
Cannabis resin

32. In contrast with the cultivation of cannabis herb, the production of cannabis resin is concentrated in a smaller number of countries, the most prominent of which are Afghanistan and Morocco. Consequently, seizure statistics for cannabis resin are also concentrated in and around those two source countries, in North Africa, South-West Asia, and in Western and Central Europe, the main consumer market. While ten 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 IX).

Figure IX

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

(Tons)



33. Western and Central Europe accounts for over 98 per cent of total cannabis resin in Europe (see Figure V). Cannabis resin seizures in this part of the region decreased from almost 580 tons in 2014 to fewer than 539 in 2015, mainly owing to decreases in Portugal and Italy. While Portugal reported a total of 2.4 tons seized in 2015, the lowest level since the late 1980s and a sharp decline from the almost 33 tons recorded in 2014, Italy reported seizing 68 tons of cannabis resin, the second highest level on record after the 113 tons reported the previous year. Cannabis resin seizures in France reached over 60 tons in 2015, up from 36 in 2014. French, Italian and Portuguese authorities reported that the cannabis resin seized mostly entered their countries either directly from Morocco or through Spain.¹³

34. As the main entry point for cannabis resin from Morocco into Western Europe, Spain continued to be the country with the highest amount of cannabis resin seized in the world, with seizures in 2015 surpassing 380 tons, virtually the same level as in 2014. Over 50 per cent of total seizures in the country occurred in Cádiz, due to its strategical position with respect to Africa.¹⁴ In Turkey, cannabis resin seizures have decreased sharply in recent years, from an unprecedented 94 tons in 2013, to 7.9 tons in 2015, the lowest level since 2007.

35. In 2015, cannabis resin seizures in North Africa decreased for the first time since 2010, reaching 395 tons, 14 per cent less than the previous year, mainly due to sharp decreases in Algeria and Egypt with respect to 2014. Despite the declines in

¹³ France, Italy and Portugal, 2015 Annual Report Questionnaire responses.

¹⁴ Country report by Spain to the Twenty-sixth Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean.

2015, cannabis resin seizures in these two countries have increased more than twenty-fold since 2005. In Morocco, an unprecedented 235 tons of cannabis resin were seized 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).¹⁵

36. Cannabis resin seizures in the Near and Middle East and South-West Asia are concentrated in Afghanistan and its neighbouring countries, Iran (Islamic Republic of) and Pakistan. Seizures in all three countries have increased sharply in 2015. In 2015 cannabis resin seizures in the Islamic Republic of Iran reached a record 98 tons, a 26 per cent increase with respect to 2014. About 90 per cent of seized cannabis resin in the country in 2015 entered from Pakistan.¹⁶ After decreasing in 2014, cannabis resin seizures in Pakistan increased again in 2015 to 279 tons, the second-highest value since 2000. Cannabis resin seizures in Afghanistan reached unprecedented levels of 163 tons in 2015, the highest level since 2008.

B. Opiates

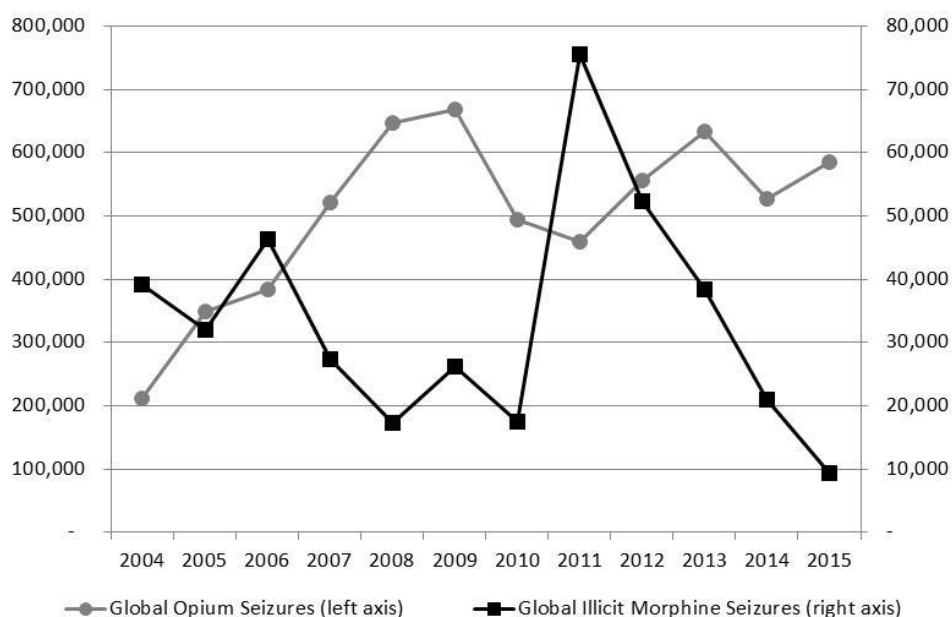
Opium and illicit morphine

37. The Near and Middle East and South-West Asia represent between 95 and 100 per cent of global opium and illicit morphine seizures. In particular, significant seizures within the region occur almost exclusively in Afghanistan and neighbouring countries, Iran (Islamic Republic of) and Pakistan.

38. After decreasing in 2014, global opium seizures increased by 11 per cent in 2015, reaching 587 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 Iran (Islamic Republic of) and Pakistan have offset this decrease. A record 59 tons were seized in Pakistan in 2015, while opium seizures in Iran (Islamic Republic of) have reached the highest level since 2009, at 479 tons.

Figure X

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



¹⁵ Country report by Egypt to the Twenty-sixth Meeting of Heads of National Drug Law Enforcement Agencies, Africa.

¹⁶ Iran (Islamic Republic of), 2015 Annual Report Questionnaire response.

39. Global illicit morphine seizures have been decreasing sharply since reaching a record 75 tons in 2011 (see Figure X). In 2015, global illicit morphine seizures amounted to just over 9 tons, a 54 per cent decrease with respect to 2014 and the lowest level on record since the early 1990s.

40. Similarly to what has happened with opium in recent years, illicit morphine seizures in Afghanistan have decreased notably since peaking at 64,028 kg in 2011, to only 18 kg in 2015. Seizures in Pakistan have also been declining over the last 10 years, reaching 762 kg in 2015, the lowest level on record since 2000. In Iran (Islamic Republic of), illicit morphine seizures reached 8.3 tons in 2015, a 35 per cent decline with respect to 2014.

41. Significant opium and illicit morphine seizures are rare in European countries. However, in 2015, France reported seizing over 4 tons of opium, the highest value reported by any European country on record and the highest seizures reported by a single country outside of the Golden Crescent in 2015.

Heroin

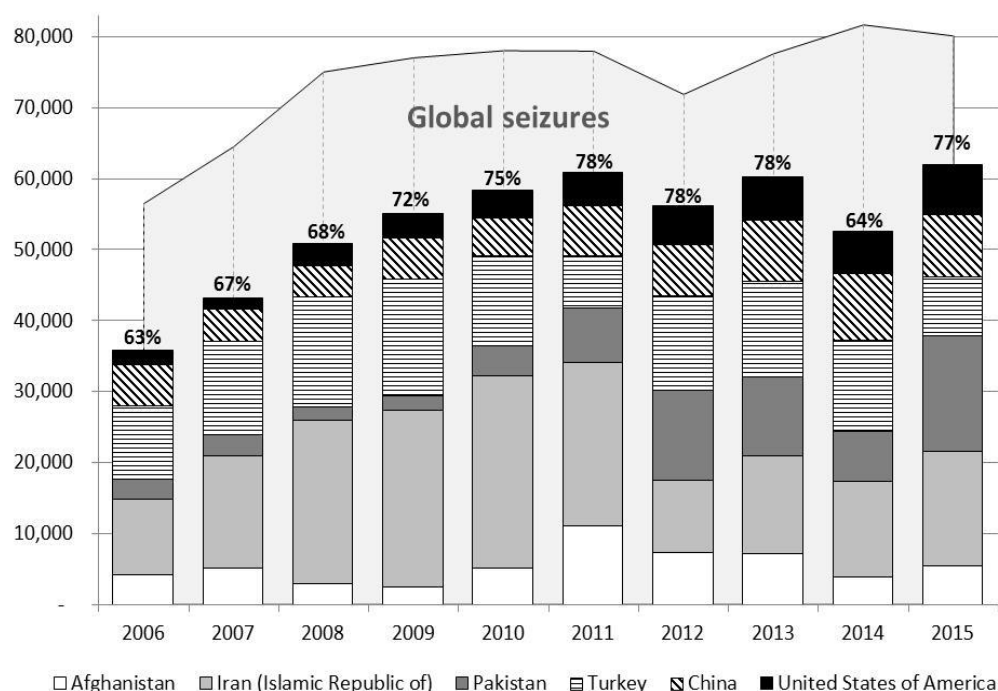
42. Compared with seizures of opium and illicit morphine, heroin seizures occur in a much wider range of countries, in particular around the larger markets in North America, Europe and Asia-Pacific. Each of these three markets is mostly supplied by a different producing region. While East and South-East Asia are supplied in the main by production in Myanmar and the Lao People's Democratic Republic, most of Europe is supplied by Afghan heroin through the "Balkan route" and the "southern route" through Iran (Islamic Republic of), Pakistan and, increasingly, countries in Africa.¹⁷ The "northern route" continues to link heroin from Afghanistan to markets in the Russian Federation.¹⁸ In North America, the United States are mostly supplied by heroin produced in Latin America.

43. At the global level, heroin seizures have remained relatively stable at high 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 seizures since 2006 (see Figure XI). Hence, global trends are heavily influenced by what occurs in these countries.

¹⁷ UNODC, *Afghan Opiate Trafficking through the Southern Route* (Vienna, June 2015).

¹⁸ UNODC, *The Illicit Drug Trade through South-Eastern Europe* (Vienna, March 2014).

Figure XI
Heroin seizures in selected countries and worldwide (2006-2015)
 (Kilograms)



44. In the Asia-Pacific region, the majority of 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 this country declined slightly to 8.8 tons. According to Chinese authorities, almost 94 per cent of heroin seized during the first nine months of 2015 originated in the Golden Triangle, while about 2 per cent was produced in the Golden Crescent.¹⁹ Despite remaining stable at around 13 tons in 2015, heroin seizures in the Asia-Pacific region have followed an increasing trend over the last decade, with seizures in Viet Nam and Myanmar increasing almost ten-fold since 2007.

45. In the Americas, heroin seizures more than doubled between 2007 and 2010, and have remained stable afterwards. In 2015, heroin seizures in the region reached record levels, owing mostly to an unprecedented 7 tons seized by the United States of America. United States' authorities reported that the majority of the heroin trafficked in the country is produced in Mexico and Colombia.²⁰ Heroin seizures in both Mexico and Colombia increased in 2015 with respect to the previous year, reaching 546 and 393 kg respectively.

46. The most used route for 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, 16.1 and 16.3 tons respectively. This represents increases of 41 per cent in Afghanistan with respect to 2014, 20 per cent in Iran (Islamic Republic of) and 138 per cent in Pakistan.

47. In South-Eastern Europe, heroin seizures decreased to 9.2 tons in 2015 after remaining stable at about 14 tons between 2012 and 2014. Heroin seizures in Turkey decreased by 35 per cent in 2015 with respect to the previous year, to 8.3 tons, the second lowest level since 2006. While Romania reported heroin seizures for

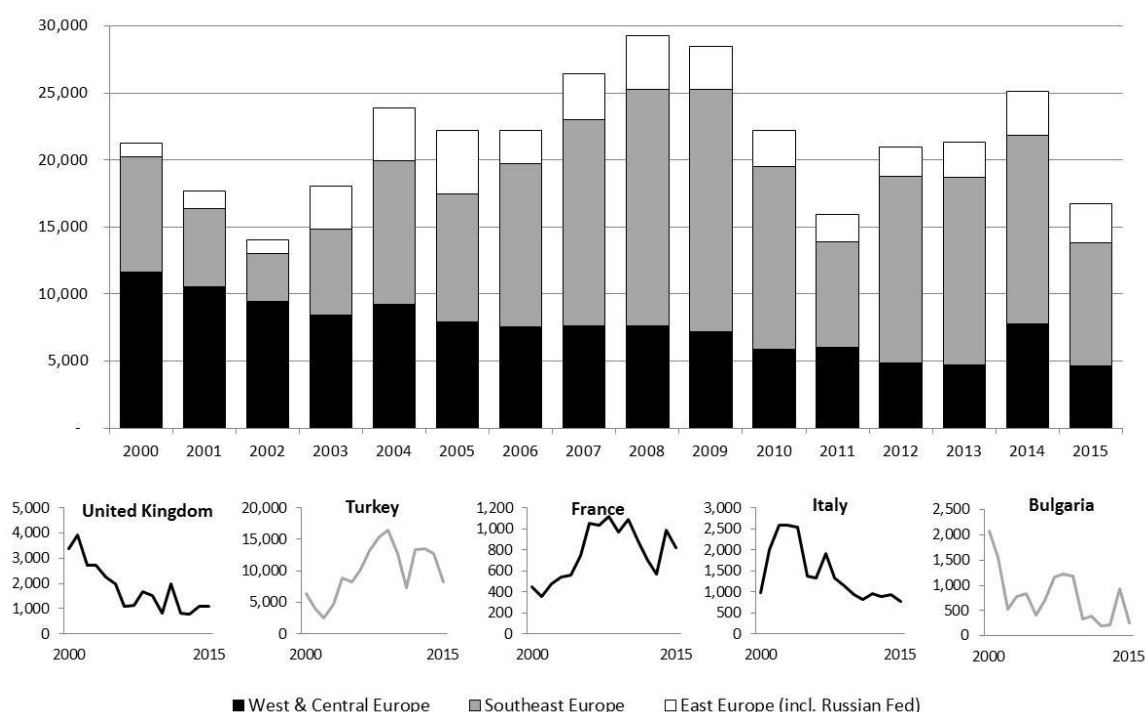
¹⁹ Country report submitted by China to the Fortieth Meeting of Heads of National Drug Law Enforcement Agencies, Asia and the Pacific.

²⁰ United States of America, 2015 Annual Report Questionnaire response.

334 kg in 2015, seizures in Bulgaria amounted to 265 kg that year, down from over 2 tons in 2000 (see Figure XII).

48. Despite a spike in 2014 due to a 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 4.6 tons in 2015, the lowest level on record since the late 1980s. Heroin seizures in several countries within the region have followed a marked decreasing trend over this period, with annual seizures falling from almost 4 tons in the early 2000s to about 1 ton in 2015 in the United Kingdom, and from over 2,500 kg to less than 800 in Italy over the same period (see Figure XII). In 2013 and 2014, the amount of large individual seizures of over 100 kg has increased notably in the European Union, and a number of Member States have recorded their largest ever seizures in this period,²¹ showing a change in the modus operandi of traffickers in recent years.

Figure XII
Heroin seizures in Europe (2000-2015)
(Kilograms)



49. While heroin continues to be trafficked to Central Asia and the Russian Federation via the Northern route, seizures along this route have decreased over the last five years with respect to the first decade of the century. In 2015, preliminary data indicate that heroin seizures in Central Asia reached 1.5 tons, down from 3 in 2014.

50. Heroin seizures in Eastern Europe remained relatively stable at around 3 tons in 2015. A sharp decrease in the Russian Federation, where less than 2 tons of heroin were seized in 2015, the lowest value since 2002, was offset by an unprecedented total of 805 kg seized in Ukraine. While most of this heroin was seized in Ukraine entering the country via land, a significant portion corresponded to heroin entering by sea from Georgia.²²

51. Various regions in Africa are developing significant roles in facilitating the transit of heroin by the “southern route”, with networks on the continent taking

²¹ EMCDDA, *EU Drug Markets Report: Strategic Overview*, 2016.

²² Ukraine, 2015 Annual Report Questionnaire response.

control over trafficking routes.²³ In Egypt, record heroin seizures were reported in recent years, with 613 and 516 kg in 2014 and 2015 respectively. Authorities from Mozambique reported that the country is 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 this country and Kenya, forcing traffickers to move south.²⁴

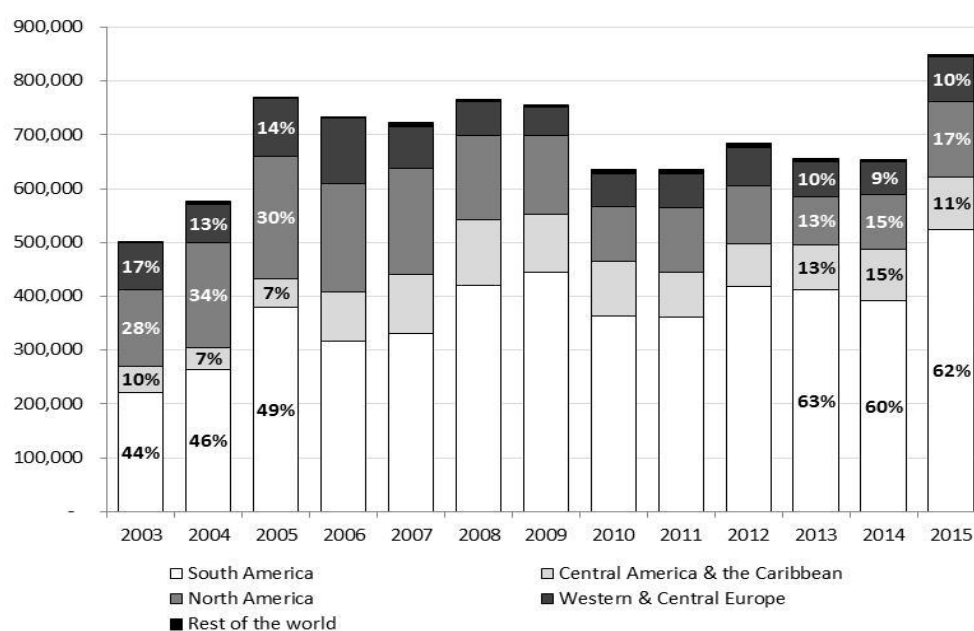
C. Cocaine

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. Therefore, global cocaine seizures are concentrated in these regions, as well as in transit regions like Central America and the Caribbean. Available data for 2015 suggest that global cocaine seizures increased sharply in 2015, reaching the highest level on record, with significant increases in almost all regions (see Figure XIII).

53. In South America, after decreasing slightly between 2012 and 2014 to 392 tons, preliminary data indicate that an unprecedented 525 tons of cocaine were seized in 2015. A record 297 tons of cocaine were seized in Colombia, up from 191 in 2014, while 65 tons were seized in Venezuela (Bolivarian Republic of), also a historical high and more than double the average annual seizures of 26 tons reported during the previous six years. In Ecuador, cocaine seizures increased for the fifth consecutive year, from 15 tons in 2010, to over 65 tons in 2015.

Figure XIII

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



54. In 2015, five European countries²⁵ listed Central America and the Caribbean, in particular Costa Rica, the Dominican Republic and Panama, as transit and departure points for cocaine. These three countries also recorded the highest cocaine seizures in the subregion in 2015. While preliminary data indicate that cocaine seizures increased in Panama (53 tons) and the Dominican Republic (9.4 tons), seizures decreased by 36 per cent in Costa Rica after the peak of 2014, reaching

²³ *Afghan Opiate Trafficking through the Southern Route.*

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

²⁵ Italy, Portugal, Spain, Sweden and Switzerland.

17 tons in 2015. Total cocaine seizures in Central America and the Caribbean remained stable at 97 tons in 2015, after increasing for two consecutive years.

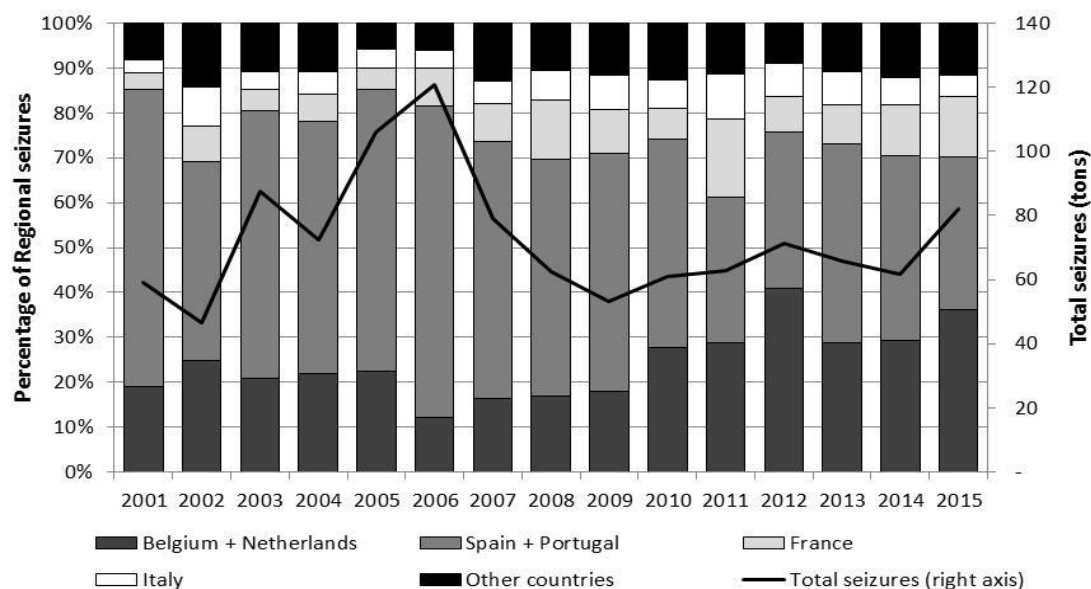
55. Global cocaine seizures seem to have been shifting geographically from the main markets to the origin and transit regions. While seizures in the production and transit regions of South America and Central America and the Caribbean have increased over the last 10 years, cocaine seizures in the main markets of Western and Central Europe and North America have followed a marked decreasing trend over the same period, despite the increments observed in 2015.

56. In North America, after decreasing to 87 tons in 2013, the lowest level reported since the late 1980s, cocaine seizures increased to 100 tons in 2014. In 2015, cocaine seizures have increased once again to 141 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 via land through the south-west border, with a smaller portion entering by sea from the Caribbean (mostly the Dominican Republic and Puerto Rico) through Miami and New York.²⁶

Figure XIV

Total cocaine seizures in Western and Central Europe and geographic distribution (2001-2015)

(Percentage/tons)



57. Cocaine seizures in Western and Central Europe peaked at 121 tons in 2006, then declined to an average of 63 tons between 2008 and 2014. In 2015, cocaine seizures in the region reached 82 tons, the highest value recorded since 2007. This rise was mostly driven by sharp increases in Belgium, the Netherlands, France and Portugal, where cocaine seizures reached 17, 12, 11 and 6 tons, up from 9, 9, 7 and 3.7 tons in 2014 respectively. The country with the highest cocaine seizures in the region continues to be Spain, where seizures remained stable at 22 tons. While Dutch authorities listed African countries as the main transit point from where cocaine entered the country, in France, Portugal and Spain seized cocaine arrived directly from Latin America, mostly via sea.²⁷

58. In recent years, the increase of cocaine smuggling in maritime containers appears to be a major threat, given the large and increasing volume of maritime trade going into the region, with major European ports such as Rotterdam and

²⁶ United States Department of Justice, Drug Enforcement Agency, *2016 National Drug Threat Assessment*.

²⁷ The Netherlands, France, Portugal and Spain, responses to the 2015 Annual Report Questionnaire.

Antwerp being targeted by traffickers.²⁸ As a result, since 2007 the Netherlands and Belgium have accounted for an increasing proportion of total cocaine seizures in Western and Central Europe, with Spain and Portugal representing a lower proportion than what was observed previously (see Figure XIV). Since 2011, total annual cocaine seizures in the Netherlands and Belgium have been at similar levels to the total amounts seized in Spain and Portugal. Additionally, other countries, including France and Italy, have gained more importance in recent years. Since 2007, cocaine seizures occurring outside of Belgium, the Netherlands, Spain and Portugal have represented about 30 per cent of total seizures in West and Central Europe, as opposed to the 20 per cent represented previously

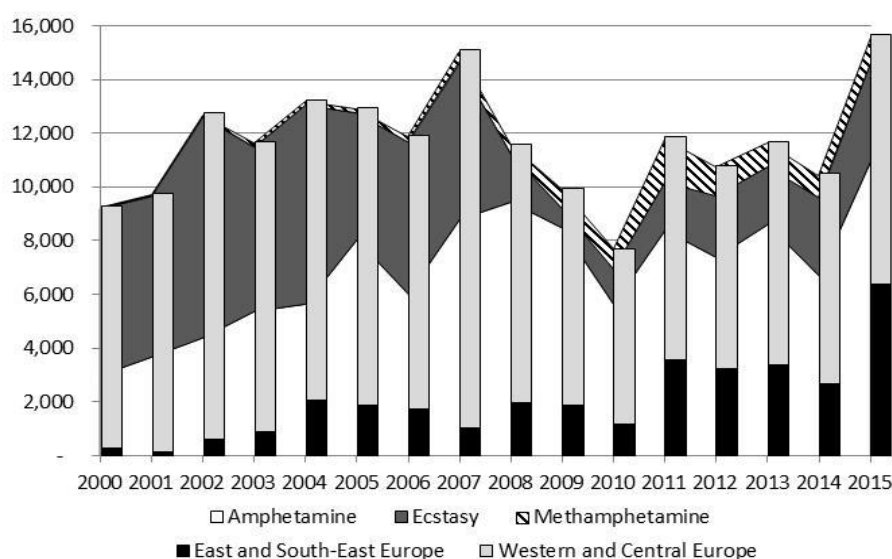
59. A secondary route for cocaine trafficked across the Atlantic to Europe involved the use of countries in Africa, notably West Africa, as transit points. Countries in West Africa have reported large seizures in recent years, with Nigeria recording over 100 kg every year since 2003, and Ghana seizing a total 1.3 tons during the 2013-2014 period. Ecuadorian authorities noticed the emergence of new routes into Europe, using West African countries as transit points.²⁹ A more recent concern involves the use of routes established for other drugs to traffic cocaine, such as cannabis routes in North Africa or heroin routes in East Africa.³⁰ In this line, Algeria, Egypt, Morocco and the United Republic of Tanzania have seen significant increases in the amounts of cocaine seized in recent years.

D. Amphetamine-type stimulants

60. Amphetamine-type stimulants can be broadly classified as amphetamines (which include amphetamine and methamphetamine) and “ecstasy”-type substances.³¹ Unlike the collection of seizure data for plant-based drugs, the collection of high-quality seizure data relating to amphetamine-type stimulants relies heavily on the proper identification and classification of seized controlled substances.

Figure XV

Amphetamine-type stimulants seizures in Europe, by type of drug and subregion (2000-2015)
(Kilograms)



²⁸ EMCDDA, *EU Drug Markets Report: Strategic Overview*, 2016.

²⁹ Ecuador response to 2015 Annual Report Questionnaire.

³⁰ EMCDDA, *EU Drug Markets Report: Strategic Overview*, 2016.

³¹ Including 3,4-methylenedioxymethamphetamine (MDMA).

61. In 2015, record amounts of amphetamine-type stimulants were seized in Europe (see Figure XV). Between 2000 and 2007, amphetamine-type stimulant seizures increased from 9 to 15 tons, mainly due to increments in amphetamine seizures in Western and Central Europe. Since 2007, seizures of “ecstasy”-type substances decreased sharply and amphetamine-type stimulant seizures in Europe reached in 2010 their lowest level during the 2000-2015 period. Total amphetamine-type stimulants seizures in the region have been increasing since, owing mostly to higher levels being seized in the southeastern part of the continent, especially in Turkey.

Methamphetamine

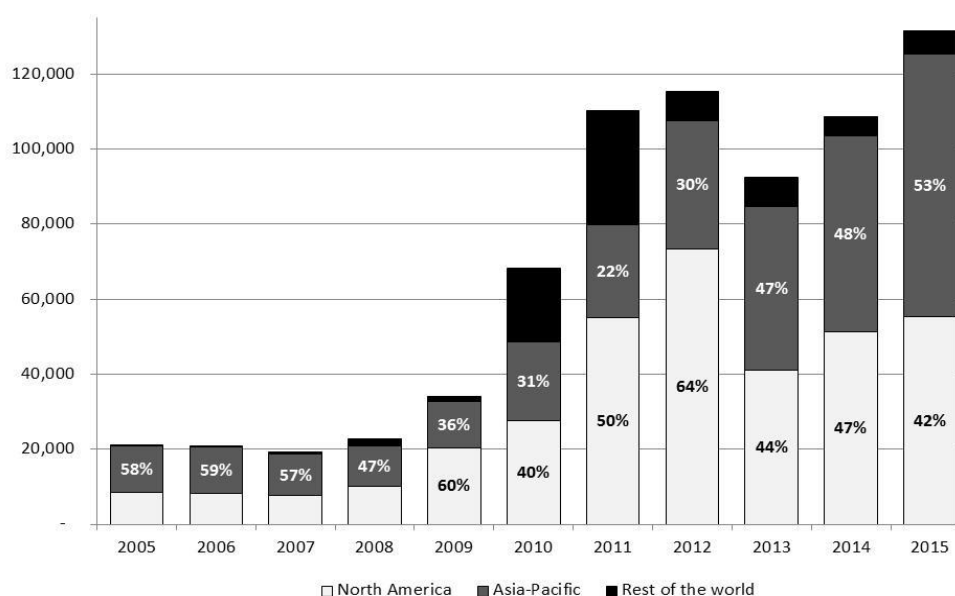
62. The regions of Asia-Pacific and North America account for the majority of global methamphetamine seizures, and the illicit manufacture of methamphetamine has traditionally been concentrated close to these consumer markets. However, it has recently also spread to other countries and regions, with recent reports of new trafficking flows connecting previously independent subregions.³² In 2015, global methamphetamine seizures reached record levels.

63. In North America, methamphetamine seizures increased slightly, mostly owing to an increment reported by Mexico. In the United States, methamphetamine seizures reached 31 tons in both 2014 and 2015, the two highest levels since 2002. National authorities reported a significant increase in liquid methamphetamine seizures, especially along the south-west border, where the drug is smuggled from Mexico and conversion laboratories are in place.³³ 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 trafficked mostly from China and the United States.³⁴

Figure XVI

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

(Kilograms)



³² UNODC, *Global SMART Update*, vol. 12 (September 2014).

³³ United States of America response to 2015 Annual Report Questionnaire.

³⁴ Mexico response to 2015 Annual Report Questionnaire.

64. In Asia-Pacific, methamphetamine seizures have been increasing steadily since 2008, with the total amount seized in the region increasing six-fold over the 2008-2015 period. In East and South-East Asia, methamphetamine is trafficked in tablets and in crystalline form, with tablets being manufactured and trafficked mostly within the Mekong subregion (notwithstanding recent evidence of the presence of tablets in Malaysia, the Republic of Korea and Singapore) and crystalline methamphetamine being spread throughout the region.³⁵

65. Methamphetamine seizures in China have increased every year since 2008, from 6 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 of domestic production.³⁶ The sharp increase in the Asia-Pacific region is not only a consequence of a rise in China, but in many countries within the region. Australia, Indonesia, Myanmar, the Philippines and Thailand have all shown strong increasing trends since 2009.

66. While methamphetamine is considerably less prevalent in Europe than amphetamine and “ecstasy”-type substances, the reported amounts of methamphetamine seized annually in the continent have followed an increasing trend since 2007. In 2015, France and Czechia surpassed 100 kg seized annually for the first time on record, with 102 and 107 kg respectively. Turkey has reported annual methamphetamine seizures for over 100 kg every year since 2009, including 261 kg in 2015. Additionally, six European countries reported the detection of domestic methamphetamine laboratories in 2015.³⁷

Amphetamine

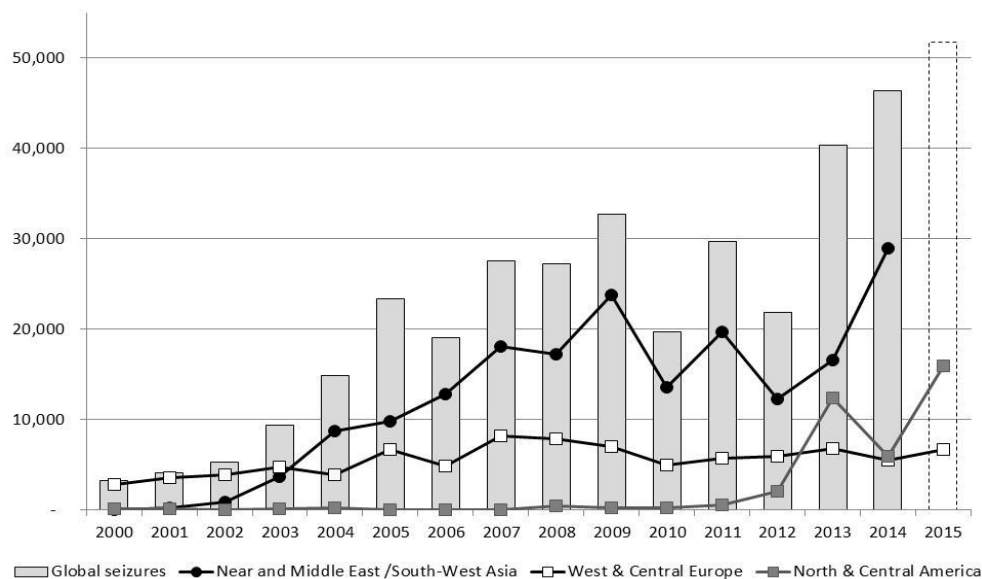
67. Since 2004, global amphetamine seizures have been concentrated mostly in the Near and Middle-East and South-West Asia (see Figure XVII). In particular, there has been a marked increase in Saudi Arabia, from less than 100 kg of amphetamine seized annually previous to 2003 to a record 17 tons in 2014. In 2015, amphetamine seizures in Saudi Arabia amounted to 10.7 tons. The increase in the region is not only a consequence of the rise in this country, but other Member States have experienced an increasing trend in recent years. Record amphetamine seizures were reported in Jordan and Lebanon in 2014, with 5.4 and 6 tons respectively, while Pakistan and the Syrian Arab Republic recorded historical highs of 2.9 and 4.2 tons respectively in 2015.

³⁵ 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* (2015).

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

³⁷ Austria, Czech Republic, Germany, Lithuania, Poland and Slovakia.

Figure XVII
Global seizures of amphetamine, by region (2000-2015)^a
 (Kilograms)



^a Data for 2015 in the Near and Middle East are incomplete.

68. Amphetamine seizures in Europe reached record levels in 2015, owing mainly to record seizures in Turkey. Despite this spike, such seizures have remained stable during the last ten years, with average annual amphetamine seizures during the 2005-2009 period being virtually equal to the average seizures during the 2010-2015 period. However, as seen in Figure XVIII, the geographical distribution of amphetamine seizures has changed significantly when comparing both periods.

69. While Western and Central Europe accounted for about 85 per cent of total reported amphetamine seizures in Europe over the 2005-2009 period, this percentage decreased to about 75 per cent during 2010-2015. Within West and Central Europe, the Netherlands and the United Kingdom accounted for a total of almost 4 tons of amphetamine annual seizures on average during 2005-2009, almost 50 per cent of all European seizures. Between 2010 and 2015, amphetamine seizures in these two countries were cut almost in half, reaching a total of just over 2 tons per year on average. Member States such as Germany, Poland, Spain and the Scandinavian countries³⁸ have showed considerable increases in the amounts of amphetamine seized annually in recent years, which partially offset the decrease in the Netherlands and the United Kingdom.

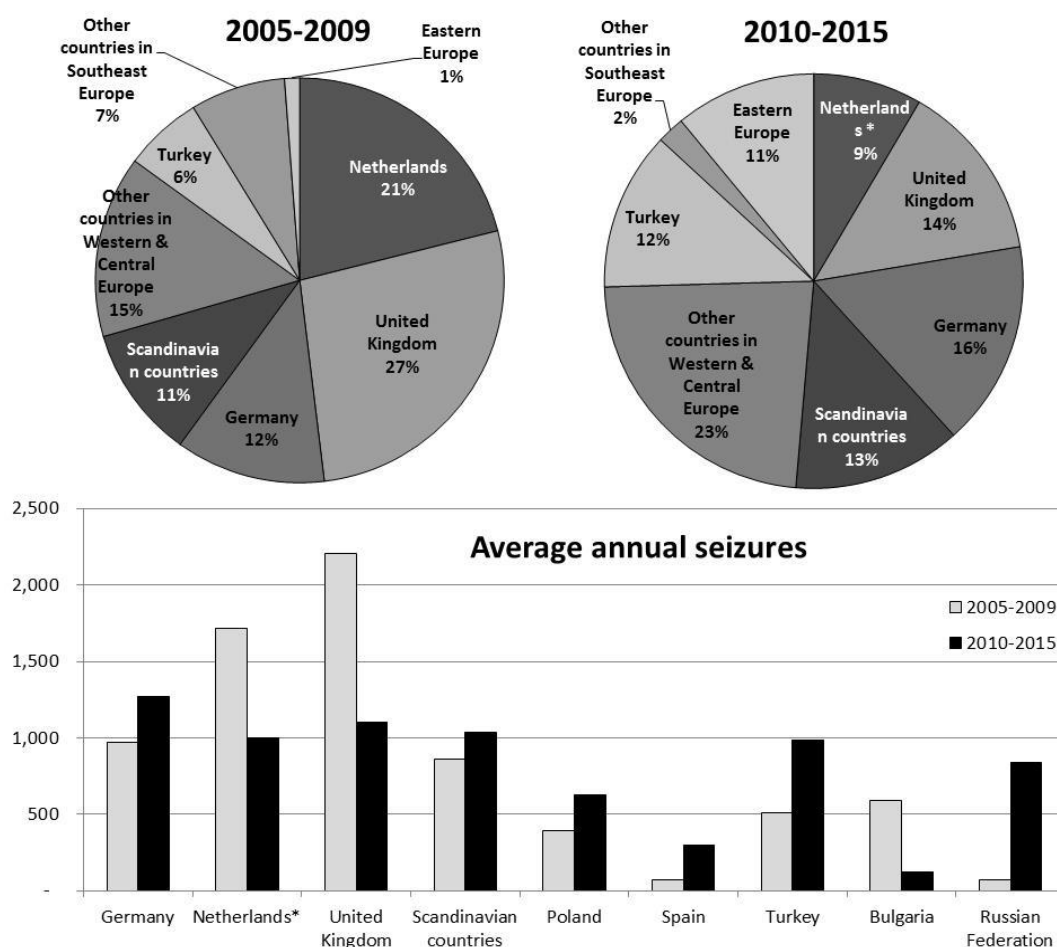
70. The decrease in amphetamine seizures in Western and Central Europe in 2010-2015 with respect to the previous five years was offset by an increase in Eastern Europe. While seizures in the Russian Federation decreased from 715 kg in 2014 to 330 in 2015, average annual amounts of amphetamine seized in this country increased from 70 kg during 2005-2009 to 837 between 2010 and 2015.

71. Whereas Bulgaria reported the highest amphetamine seizures in South-Eastern Europe during most of the first decade of the century, seizures in this country have decreased significantly during the last seven years. This decrease was offset by high seizures in Turkey, where 3.8 tons of amphetamine were seized in 2015, the highest value reported by any European country on record. As a result, average annual amphetamine seizures in South-Eastern Europe during 2005-2009 remained at the same level as between 2010 and 2015.

³⁸ Denmark, Finland, Norway and Sweden.

Figure XVIII

Geographical distribution of total amphetamine seizures in Europe and average annual seizures in selected countries (2005-2009 and 2010-2015)
(Percentage/kilograms)



* The Netherlands did not report amphetamine seizures in 2013 and 2014. The average and totals for this country during 2010-2015 only include 2010, 2011, 2012 and 2015.

72. In recent years, there has been an increased presence of amphetamine in the Americas, in particular in North and Central America (see Figure XVII). The United States was the country with the highest reported amphetamine seizures globally in 2013, with over 12 tons. While seizures have decreased in recent years to 4.3 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 due to an unprecedented multi-ton seizure that year. Mexico reported seizing a record 300 kg of amphetamine in 2015.

“Ecstasy”-type substances

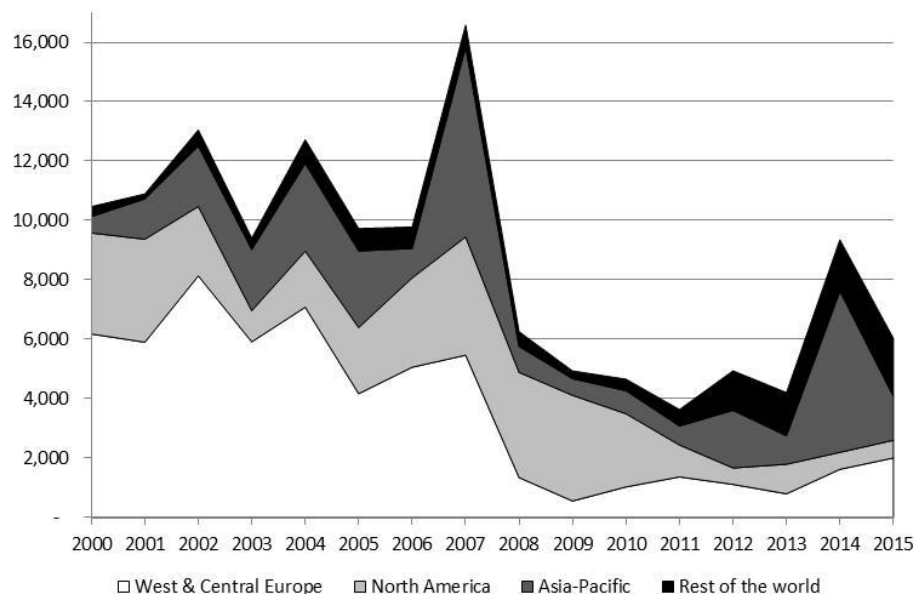
73. After increasing to 9.3 tons in 2014, global seizures of “ecstasy”-type substances decreased to 6.2 tons, a higher level than that observed during the 2009-2013 period, when seizures averaged 4.5 tons. As seen in Figure XIX, seizures of 3,4-methylenedioxymethamphetamine (MDMA) have followed a decreasing trend over the last 15 years, mostly due to declines in the North America and Western and Central Europe markets. In recent years, global trends seem to be more affected by regional tendencies in the Asia-Pacific region, suggesting that this region “might be becoming an emerging driver of the global market for ecstasy”.³⁹ Other regions, in

³⁹ *The Challenge of Synthetic Drugs in East and South-East Asia and Oceania: Trends and Patterns of Amphetamine-type Stimulants and New Psychoactive Substances.*

particular Turkey in South-Eastern Europe, have also seen sharp increases in “ecstasy” seizures in recent years.

Figure XIX

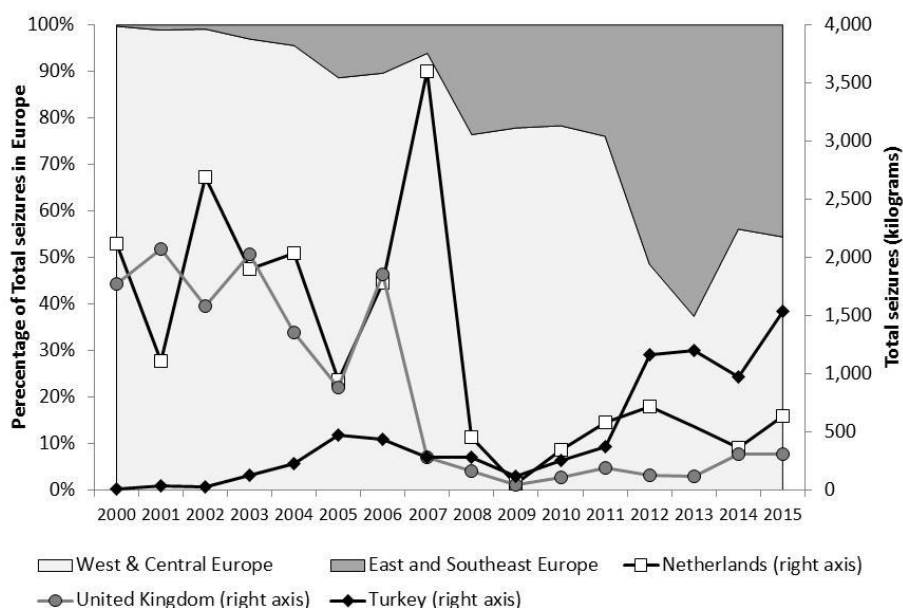
Global seizures of “ecstasy”-type substances, by region (2000-2015)
(Kilograms)



74. The decrease in reported MDMA seizures within the Asia-Pacific region in 2015 is mainly due to a decline in Australia, from 4,375 kg in 2014 to 671 kg the following year. In North America, seizures of “ecstasy”-type substances have decreased sharply in recent years, from 3,557 kg in 2009 to 571 and 604 kg in 2014 and 2015 respectively.

Figure XX

Seizures of “ecstasy”-type substances by selected European countries and proportion of total seizures in Europe by subregion (2000-2015)
(Percentage/kilograms)



Note: No MDMA seizures available for the Netherlands in 2013.

75. In 2008, MDMA seizures in Western and Central Europe decreased sharply, mostly due to considerable declines in amounts seized in the United Kingdom and

the Netherlands. Seizures in these two countries have remained at significantly lower levels since (see Figure XX), amounting to 307 kg in the United Kingdom and 632 in the Netherlands in 2015. Turkey reported the highest seizures of “ecstasy”-type substances by a single country at the global level in 2015, with a record 1,538 kg. This country has reported close to one ton seized annually between 2012 and 2014, up from an average 285 kg during the previous 9 years. As a result, the proportion of total seizures of “ecstasy”-type substances in Europe that take place in the southeastern part of the continent has increased from less than 10 per cent during 2000-2007, to over 40 per cent in recent years.

IV. Conclusions

76. 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. After increasing consistently since 2009 and reaching record levels in 2013 and 2014, cannabis herb seizures in Europe decreased sharply in 2015 due to considerable declines both in the western/central, and the southeastern part of the continent. Cannabis resin seizures in the region continue to be concentrated in Western and Central Europe.

77. After decreasing in 2015 for the first time in six years, preliminary data suggest that the global area under opium poppy cultivation may have increased again in 2016. 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. Heroin seizures in Western and Central Europe continued to decrease in 2015, following a trend present since the turn of the century. In South-Eastern Europe, heroin seizures declined sharply in 2015, while remaining stable in Eastern Europe.

78. 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, with increments in most regions. European cocaine seizures continue to be concentrated in the Western and Central Europe, where seizures reached in 2015 the highest level since 2006.

79. Amphetamine-type stimulants seizures have been following a sharp increasing trend since 2008, and 2015 marked a new global record. While global amphetamine and methamphetamine seizures have followed sharp increasing trends over the last fifteen years, seizures of “ecstasy”-type substances have decreased over the same period. Seizures of both amphetamine and “ecstasy”-type substances, the most prevalent amphetamine-type stimulants in Europe, increased significantly in the continent in 2015. In recent years, South-Eastern Europe has accounted for an increasing proportion of total seizures of amphetamine and “ecstasy”-type substances in Europe, with the western and central part of the continent representing a decreasing proportion.