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**Twenty-sixth Meeting of the Heads of National
Drug Law Enforcement Agencies, Africa**

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Item 3 of the provisional agenda**

**Current situation with respect to regional and subregional
cooperation in countering drug trafficking****Statistical analysis of drug trafficking trends in Africa and
worldwide****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 to the year up to and including 2014 and, where available, 2015.

Global opium poppy cultivation continues to be concentrated mostly in Afghanistan and Myanmar. While the total area under cultivation increased in 2014, preliminary data seem to suggest a decrease in 2015 for the first time since 2009, owing mainly to a sharp decrease in Afghanistan. Conversely, the worldwide area under coca cultivation, concentrated in Bolivia (Plurinational State of), Colombia and Peru, increased significantly in 2014 for the first time since 2007.

African countries continue to be used as transit points for cocaine trafficked from South America and heroin trafficked from Asia. They are increasingly being viewed as consumption markets for these two drugs by international trafficking groups. While global heroin seizures remained relatively stable in 2014, seizures in Africa rose to record levels. Global cocaine seizures have remained stable since 2010, with West African countries continuing to report significant amounts seized.

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

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Cultivation, trafficking and consumption of cannabis herb continues to occur in all parts of Africa and the world. Cannabis herb seizures in Africa represented around 14 per cent of global seizures in 2013 and 2014. Cannabis resin seizures continue to be concentrated in South-West Asia, Europe and North Africa; the latter accounted for 29 and 32 per cent of global seizures in 2013 and 2014 respectively.

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 Africa. The analysis includes information available to the United Nations Office on Drugs and Crime (UNODC).
2. Section II of the report addresses the illicit cultivation and production of plant-based drugs for the years up to and including 2014 and, where available, 2015. With regard to drug trafficking, section III focuses on seizure statistics for 2014 and previous years and provides an update on trafficking trends with regard to cannabis, opiates, cocaine and amphetamine-type stimulants, with a specific focus in Africa. Data from the 2015 Annual Report Questionnaires are included if available at the time of writing.
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 questionnaires provide the primary source of information on drug trafficking patterns and seizures of illicit drugs. Over one hundred Member States and territories, including 14 in Africa, responded to part IV of the 2014 Annual Report Questionnaires. At the time of writing, UNODC had received 6 responses from countries in the region to part IV of the 2015 survey. Additional sources of information include official government reports, as well as UNODC publications and country reports from the Meetings of the Heads of National Drug Law Enforcement Agencies and the Subcommittee on Illicit Drug Traffic and Related Matters in the Middle East, held in 2015.
4. 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

5. 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 in forests.

6. 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. However, no recent information on the cultivation and production of cannabis resin in these countries is available to UNODC.

7. According to the latest available information, Morocco reported eradicating 5,000 ha of cannabis in 2013 and estimated that, after eradication, 42,000 ha remained under cannabis cultivation. This represents a reduction of almost 70 per cent compared with 2003 levels (134,000 ha).¹ 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).

8. 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. This represents an increase of 8 per cent compared with 2011. 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.²

9. In Africa, the cultivation, consumption and trafficking of cannabis is highlighted as an ongoing concern among most law enforcement authorities. Nigeria, Swaziland and Egypt reported the eradication of 4,259 and 1,069 hectares (1,515 during the first eight months of 2015), and 793 acres respectively in 2014.³ Egyptian authorities emphasized the challenge posed by cannabis cultivation detection operations in the country, due to their intensive demand on human, material and technical resources.⁴ In Swaziland, extensive cannabis cultivation continues throughout the year due to the use of modern irrigation systems, across the country's four geographical regions.⁵

B. Opium poppy cultivation

10. Afghanistan and Myanmar continued to account for the majority of illicit opium poppy cultivation worldwide. Cultivation in Myanmar remained relatively

¹ United Nations Office on Drugs and Crime and Government of Morocco, "Maroc: enquête sur le cannabis 2003" (December 2003).

² UNODC and Ministry of Counter Narcotics of Afghanistan, *Afghanistan Opium Survey 2015* (Vienna, March 2016).

³ Country reports submitted by Egypt, Nigeria and Swaziland to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Africa.

⁴ Country report submitted by Egypt to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Africa.

⁵ Country report submitted by Swaziland to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Africa.

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. Preliminary data suggest that global opium poppy cultivation decreased in 2015, after increasing by 5 per cent in 2014.

11. According to the findings of the *Afghanistan Opium Survey 2015*, while the number of poppy-free provinces was reduced in 2015, opium poppy cultivation decreased to 183,000 ha after reaching record levels in 2014 of 224,000 ha. The vast majority of the cultivation (90 per cent) took place in the southern and western regions of the country. The decrease in poppy cultivation was due mainly to significant decreases in the two main cultivating regions as well as in the eastern part of the country. The combination of a fall in the area under cultivation and a sharp decrease in the yield to 18.3 kg per ha (down from 28.7 in 2014) resulted in potential opium production reaching 3,300 tons⁶ in 2015, about half the level of 2014 (6,400 tons).

12. 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 hectares 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 hectares.

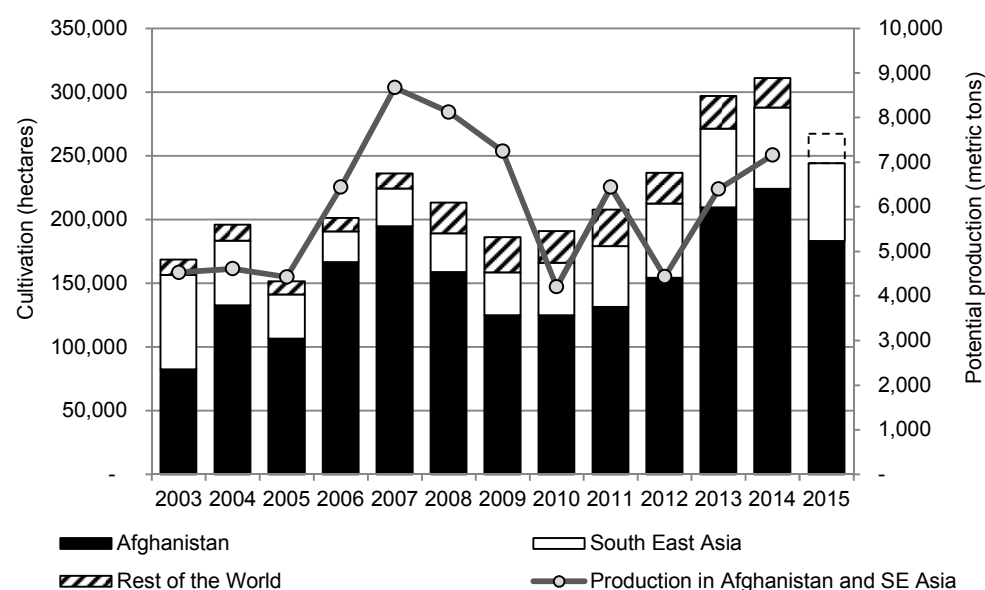
13. Because of the geographical environment in which opium is cultivated in South-East Asia, on hills with poor soil and no irrigation, the yield in that region has traditionally been notably lower than in Afghanistan. While the yield in the Lao People's Democratic Republic in 2014 reached 14.7 kg per ha, in Myanmar it remained at 11.7 kg per ha in 2014 and 2015. Overall, the two countries produced an estimated total of between 731 and 823 tons of opium in 2015.

14. Even though it is not widespread in Africa, there is evidence of opium poppy cultivation occurring in the continent. Algerian authorities reported the eradication of one opium poppy cultivation site in 2014, with the destruction of 7,470 plants. In Egypt, poppies are grown in the Sinai and Upper Egypt,⁷ where 98 hectares were eradicated in 2014.

⁶ In the present report, the term "tons" refers to metric tons (1,000 kg, or 2,204.6 lb).

⁷ Country report submitted by Egypt to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Africa.

Figure I

Opium cultivation by region and potential opium production in Afghanistan and South-East Asia (2003-2015)^a

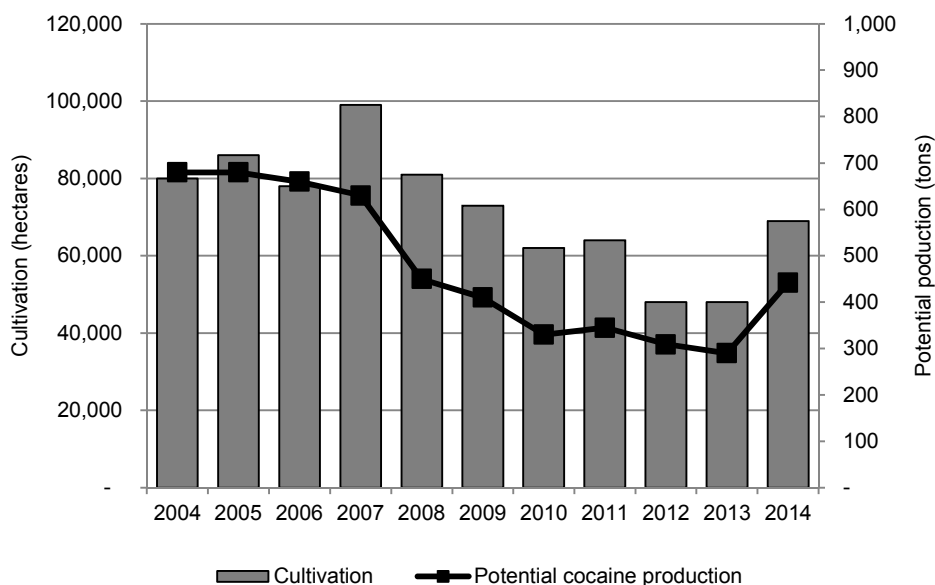
^a At the time of preparation of the present report, for 2015 cultivation figures were available only for Afghanistan and South-East Asia. The chart shows indicative global cultivation for 2015 based on cultivation in the previous year.

C. Coca cultivation

15. Bolivia (Plurinational State of), Colombia and Peru continued to account for virtually all the cultivation of coca bush worldwide. The total area under cultivation in the three countries increased by 10 per cent from 120,800 ha in 2013 to 132,500 ha in 2014, the most significant increase since 2007. This was due mainly to a sharp increase of 44 per cent in Colombia, while the area under cultivation in Bolivia (Plurinational State of) and Peru continued to decrease in 2014. Despite the increase, the area under coca bush cultivation recorded in 2014 in the three countries was the second lowest since 1986, after the historical low recorded in 2013.

16. The *Coca Cultivation Survey 2014*, conducted jointly by the Government of Colombia and UNODC, showed that coca bush cultivation in Colombia increased significantly to 69,000 ha in 2014, after reaching historically low levels (48,000 ha) in 2013. Despite the increase in 2014, the area under coca bush cultivation in Colombia has decreased significantly compared with the levels reached at the turn of the century. After reaching 290 metric tons in 2013, the lowest value since 1996, potential cocaine production in Colombia increased sharply in 2014 to 442 tons, owing not only to the increase in the area under cultivation, but also to a 14 per cent increase in the yield with respect to 2013 and lesser impact in terms of spraying and manual eradication.

Figure II
Coca bush cultivation and potential cocaine production in Colombia (2004-2014)

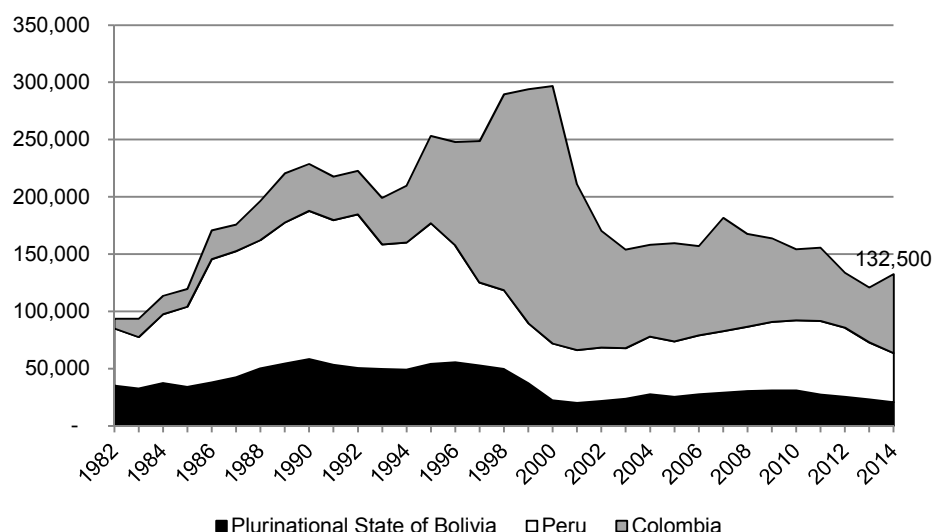


17. According to the 2014 national coca monitoring survey in the Plurinational State of Bolivia, the cultivation of coca bush fell by 11 per cent to 20,600 ha in 2014, the lowest level recorded since 2001. The manual eradication of coca bush in the Plurinational State of Bolivia remained stable in 2014, reaching 11,144 ha. In addition, the number of cocaine hydrochloride laboratories destroyed by the authorities has continued to increase steadily since 2008, when 7 laboratories were destroyed, reaching 74 in 2014.

18. According to the 2014 national coca crop monitoring survey conducted by UNODC and the Government of Peru, the area under coca bush cultivation in Peru at the end of 2014 stood at 42,900 ha, a 14 per cent decrease compared with 2013 (49,800 ha), and the lowest level recorded since the 1970s. Planned eradication by the Peruvian authorities has been the main factor behind the reduction, with eradication increasing by more than 30 per cent compared with 2013, reaching a total of 32,500 ha.

19. 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 the data from the annual report questionnaire for 2014, several countries in South America, including Argentina, Brazil, Chile and Ecuador, reported the detection of clandestine laboratories processing coca leaf derivatives. In 2014, the United States of America, Greece and Spain also reported the detection of such laboratories.

Figure III
Coca bush cultivation in Bolivia (Plurinational State of), Colombia and
Peru (1982-2014)
(Hectares)



III. Global trends in illicit drug trafficking and seizures

20. Table 1 shows the quantities of the major drug types seized globally and by countries in Africa in 2013 and 2014.

Table 1
Drug Seizures in Africa, 2013 and 2014

Drug Type	Africa			Global Seizures			Africa as a proportion of Global Total	
	2013 (Kilograms)	2014 (Kilograms)	Trend ^(a,b)	2013 (Kilograms)	2014 (Kilograms)	Variation	2013 (Percentage)	2014 (Percentage)
Cannabis herb	771,986	829,312	Stable (+7%)	5,616,832	5,834,027	+4%	14%	14%
Cannabis resin	403,855	457,542	Increase (+14%)	1,405,753	1,433,484	+2%	29%	32%
Cocaine ^c	1,288	1,932	Increase (+51%)	655,140	654,930	0%	0%	0%
Heroin	322	7,096	Increase	77,616	81,403	+5%	0%	9%
Opium	90	141	Increase (+68%)	634,348	525,535	-17%	0%	0%
Illicit morphine	<1	<1	NA	38,472	20,930	-46%	0%	0%
Amphetamine	1,280	3,544	Increase (>100%)	40,398	46,400	+15%	3%	8%
Methamphetamine	897	135	Decrease (-64%)	89,287	108,267	+21%	1%	0%
“Ecstasy”	3.7	2.6	Decrease (-31%)	4,209	9,353	+122%	0%	0%

^a Since data for 2014 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 2013 and 2014. Totals for 2014 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.

21. Seizure data available to UNODC for Africa are limited, with only 14 countries submitting part IV of the ARQ in 2014 and 11 in 2013, making the analysis of trends at the regional and subregional levels challenging. However, some conclusions can be drawn. According to available data, Africa accounts for significant amounts of both cannabis herb and resin seizures, with about 14 and 30 per cent of the respective global amounts seized in 2013-2014. Amphetamine seizures have increased notably in recent years in the region, reaching 8 per cent of global seizures in 2014. Africa represented 9 per cent of global heroin seizures in 2014, mainly due to a multi-ton single seizure reported by Kenya.

A. Cannabis

Cannabis herb

22. After decreasing significantly between 2010 and 2012, global cannabis herb seizures remained stable in 2013 and 2014 with declines in North America being offset by increases in Latin America and the Caribbean.

23. Seizures of cannabis herb in North America have decreased notably every year since 2010. In 2014, cannabis herb seizures continued to decrease in both the United States (by 26 per cent compared with 2013) and Mexico (by 9 per cent), and both countries reached levels that were less than half of those reported in 2010. The United States reported observing changes in the trafficking routes used, with a decrease in cannabis herb entering the country through Mexico and an increase in cannabis herb transiting through the United States into other countries.⁸

24. Having recorded more than 70 per cent of global cannabis herb seizures in 2010, North America accounted for less than 45 per cent in 2014, while Latin America and the Caribbean and Africa have accounted for an increasing proportion in recent years. Cannabis herb seizures in South America have been increasing notably since 2010. After a sharp rise of almost 60 per cent in 2013, seizures increased again in 2014 by 9 per cent to reach 1,427 tons. While most countries in the region showed moderate decreases, Paraguay reported a sharp increase from 462 tons in 2013 to 712 tons in 2014, reaching record levels. Cannabis herb seizures in the Caribbean increased notably and amounted to almost 800 tons in 2014.

25. After reaching historically high levels in 2013 with 359 tons, cannabis herb seizures in Europe remained stable in 2014 at 352 tons. In 2014, seizures in Turkey decreased for the first time in a decade, reaching 92 tons, down from 180 tons in 2013. This decrease was offset by a sharp increase in Albania, where cannabis herb seizures reached a record 102 tons in 2014, up from 21 tons in 2013. With cannabis herb seizures increasing significantly in recent years in West, Central and Southeast Europe, the production and trafficking of cannabis herb is an area of growing concern for law enforcement efforts in Europe because of the increasing involvement of organized crime in the region.⁹

26. After the Americas, Africa continues to be the region with the highest amount of cannabis herb seized annually. However, only 13 African countries reported cannabis

⁸ Replies submitted by the United States to part IV of the annual report questionnaire for 2014.

⁹ European Monitoring Centre for Drugs and Drug Addiction, *European Drug Report: Trends and Developments 2015* (Luxembourg, 2015).

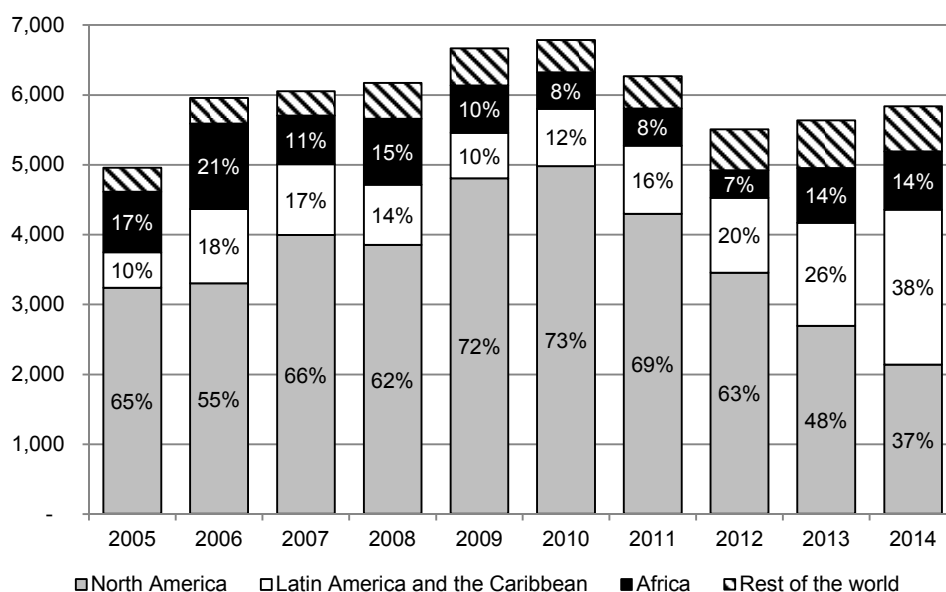
herb seizures to UNODC in 2014 (12 in 2013). Egypt, Morocco and Nigeria reported seizing more than 100 tons of cannabis herb each in 2014, with 396, 155 and 159 tons, respectively. Other countries such as Burkina Faso, Ghana, Madagascar, Swaziland, the United Republic of Tanzania and Zambia also reported significant annual seizures of over 10 tons during 2013-2014, confirming that cannabis herb trafficking continued to affect all geographical subregions within the continent.

27. After reaching record levels in 2014, preliminary data suggest that cannabis herb seizures in Egypt remained stable at 360 tons in 2015. In Morocco, cannabis herb seizures more than doubled in 2015 with respect to 2014, reaching almost 314 tons.

Figure IV

Global cannabis herb seizures, by region (2005-2014)^a

(Tons)



^a Data for 2014 are preliminary and incomplete.

Cannabis resin

28. 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, in South-West Asia and in Western and Central Europe, which is one of the main consumer markets. While 10 years ago cannabis resin seizures were concentrated mainly in Western and Central Europe, seizures have been more evenly distributed across those three regions in recent years (see figure V).

29. Cannabis resin seizures in Western and Central Europe increased in 2014 by 28 per cent with respect to 2013, reaching the highest level since 2009 with 580 tons. As the main entry point for cannabis resin from Morocco into Western Europe, Spain continued to be the country reporting the highest amount of cannabis resin seized in the world, with seizures in 2014 reaching almost 380 tons, an

increase of 19 per cent compared with 2013. Other Western European countries reporting large amounts of cannabis resin seized during 2014 were Italy (113 tons), France (37 tons) and Portugal (33 tons); most of the resin originated in Morocco.¹⁰

30. Cannabis resin seizures in the Near and Middle East and South-West Asia, have been concentrated in Afghanistan and its neighbouring countries, Iran (Islamic Republic of) and Pakistan. In 2014, cannabis resin seizures in this region decreased, owing mainly to a decline in Pakistan, where seizures amounted to 231 tons after reaching record levels in 2013 of 313 tons. Pakistan reported that 100 per cent of the cannabis resin seized originated in Afghanistan, with the majority being destined for other countries, including Belgium, Canada and the United Kingdom of Great Britain and Northern Ireland. The Islamic Republic of Iran and Afghanistan reported 78 and 32 tons of cannabis seized respectively in 2014.

31. The Turkish authorities reported the trafficking of cannabis resin into the country through Iran (Islamic Republic of) and the Syrian Arab Republic.¹¹ Cannabis resin seizures in Turkey have surpassed the 20-ton mark every year since 2010, and record levels were reached in 2013, with 94 tons. In 2014, cannabis resin seizures in Turkey decreased sharply to 31 tons.

32. Cannabis resin seizures in North Africa have increased every year since 2010. That trend continued in 2014, with a 14 per cent rise, driven by a sharp increase in Morocco, where cannabis resin seizures more than doubled, from 107 tons in 2013 to 221 in 2014. While cannabis resin seizures in Africa have been historically concentrated in Morocco, other North African countries such as Algeria and Egypt have reported significant amounts of cannabis resin seized in recent years. After reaching a record 211 tons in 2013, cannabis resin seizures in Algeria decreased slightly to 182 tons in 2014.

33. Egyptian authorities reported a total of 84 tons of cannabis resin seized in 2013, a six-fold increase with respect to the average corresponding to the 2008-2012 period. In 2014, seizures in Egypt decreased to 54 tons, still significantly above the levels observed during previous years. 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).¹²

34. Preliminary 2015 data suggest a decrease in the amount of cannabis resin seized in Egypt, with 33.5 tons, while seizures in Morocco increased slightly with respect to 2014, reaching 235 tons. Algerian authorities reported seizing almost 46 tons of cannabis resin during the first four months of 2015.¹³

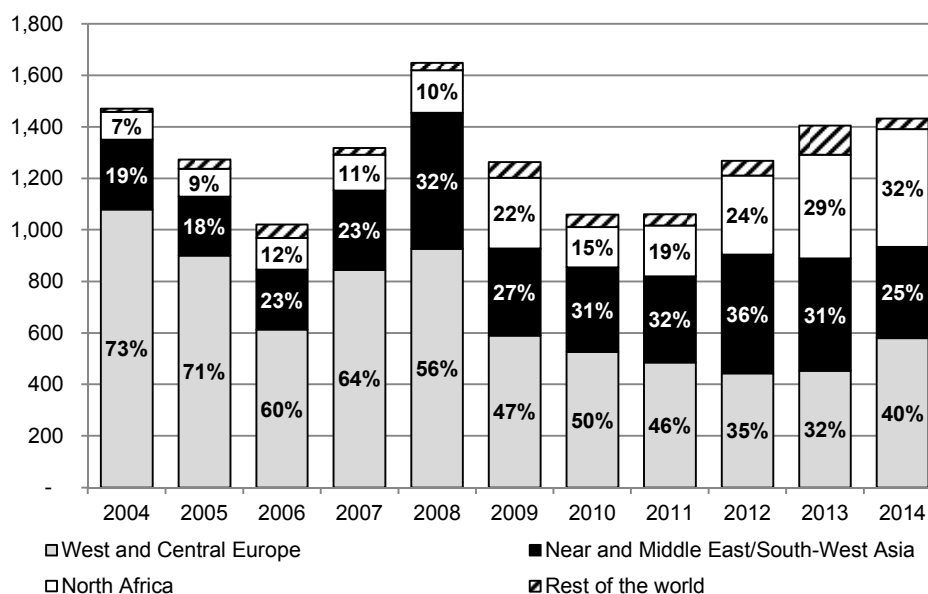
¹⁰ Replies submitted by France, Italy and Portugal to the annual report questionnaire for 2014.

¹¹ Turkish National Police, Department of Anti-Smuggling and Organized Crime, *Turkish Drug Report 2014* (Ankara, 2014).

¹² Country report submitted by Egypt to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Africa.

¹³ Country report submitted by Algeria to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Africa.

Figure V
Global cannabis resin seizures, by region (2004-2014)^a
 (Tons)



^a Data for 2014 are preliminary and incomplete.

B. Opiates

Opium and illicit morphine

35. Global seizures of opium and illicit morphine are heavily concentrated in South-West Asia, particularly in Afghanistan, the main producer, and its neighbouring countries, Iran (Islamic Republic of) and Pakistan. These three countries have consistently accounted for over 90 per cent of total opium and illicit morphine seizures since 2005.

36. After increasing at a marked pace over the period 2002-2008 and peaking in 2009 at 653 tons, global opium seizures declined in 2010 and 2011. In 2012 and 2013, global opium seizures increased without reaching the previous peak. In 2014, global opium seizures have decreased again, driven mainly by a decrease in reported seizures by the Islamic Republic of Iran, where seizures reached 393 tons, a decline from 436 in 2013.

37. Seizure data suggest an increased trend in terms of opium trafficked in North America in recent years. In 2013, seizures of opium reached record levels in the United States, an unprecedented 38 tons. While seizures in the United States declined to 6.4 tons in 2014, for the same period Mexico reported the highest amount of opium seized on record, 3.4 tons. Other countries with significant opium seizures in 2014 were India, China and Australia, all reporting over one ton of opium seized.

38. After peaking at over 75 tons in 2011, global morphine seizures decreased for the third consecutive year in 2014, reaching 21 tons, owing mainly to a decline in

reports by Afghanistan. After reaching 64 tons in 2011, illicit morphine seizures in Afghanistan decreased sharply to 6.4 tons in 2014 (24 tons in 2013). While illicit morphine seizures decreased in Pakistan as well, reaching 1.1 tons in 2014, Iran (Islamic Republic of) reported a third consecutive increase in 2014, with seizures amounting to 12.7 tons.

39. As seen on Table 1, opium and illicit morphine seizures in Africa were not significant. However, Egypt and Algeria, have consistently reported opium seizures throughout the years. In particular, Egypt has reported an average of 56 kilograms of opium seized annually between 2000 and 2014, and preliminary data suggest that in 2015 opium seizures amounted to a record 159 kilograms in the country. Opium is both cultivated in Egypt and brought into the country from East and West Asia. No trafficking operations from abroad have been detected recently, since producers in Asia are increasingly processing the drug into heroin.¹⁴

Heroin

40. Compared with seizures of opium and illicit morphine, heroin seizures occurred in a much wider range of countries, in particular around the larger markets in North America, Europe and Asia-Pacific.¹⁵ 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.¹⁶ The "Northern route" continues to link heroin from Afghanistan to markets in the Russian Federation.¹⁷ In North America, the United States is supplied largely by Latin America, while the majority of heroin entering Canada is of Afghan origin.¹⁸

41. In the Asia-Pacific region, the majority of heroin seizures are concentrated in China, where the amount of heroin seized in 2014 increased for the fourth consecutive year, reaching 9.4 tons, about 10 per cent higher than the level reported in 2013. Although the Golden Triangle continues to be the main source of heroin, the Chinese authorities reported that Afghan heroin reaches the country by sea, land, air and mail.¹⁹ Despite the increase observed in China, preliminary data suggest that total heroin seizures in the region remained stable in 2014, with sharp decreases of 40 to 50 per cent compared with 2013 in Malaysia (456 kg), Thailand (445 kg) and Viet Nam (479 kg).

42. Afghanistan, China, Iran (Islamic Republic of), Pakistan and Turkey are the five countries with the highest annual amounts of heroin seized in recent years, consistently accounting for more than 60 per cent of global seizures since 2006. The Pakistan authorities estimated that 44 per cent of Afghan heroin transits through

¹⁴ Country report submitted by Egypt to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Africa.

¹⁵ "Asia-Pacific" refers to the regions of East and South-East Asia and Oceania as a whole.

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

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

¹⁸ *World Drug Report 2015* and Canada annual report questionnaire for 2014.

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

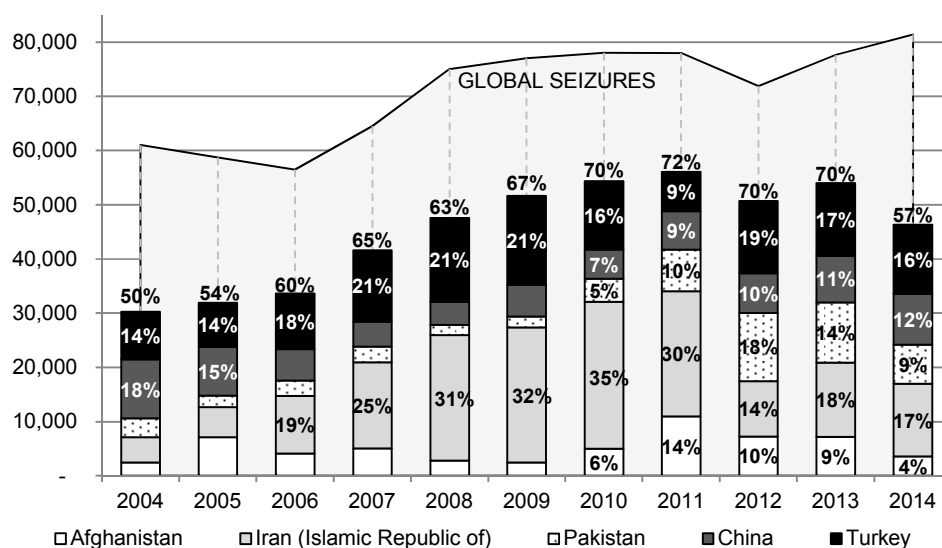
Pakistan,²⁰ while the Turkish authorities cited heroin production in Afghanistan as the source of most of the heroin seized in the country.²¹ In 2014, heroin seizures in Pakistan decreased sharply by 35 per cent compared with 2013, reaching 7.2 tons, while seizures in the Islamic Republic of Iran remained stable at 13.5 tons. After peaking in 2011 at 11 tons, annual heroin seizures in Afghanistan decreased for the third consecutive year in 2014, to 3.8 tons. In Turkey, heroin seizures decreased slightly to 12.8 tons in 2014, down from 13.5 tons in 2013.

43. In Western and Central Europe, heroin seizures had decreased gradually from 11.6 tons in 2004 to 4.8 tons in 2013. However, 2014 saw a sharp increase to 7.2 tons. The increase was due mainly to a major 2-ton heroin seizure in June in Greece, where annual seizures rose from 235 kg in 2013 to 2,588 kg in 2014. A new study suggests that networks operating between Pakistan and Europe have become dominant in recent years and are targeting Belgium, the Netherlands and the United Kingdom for trafficking by the “Southern route”.²²

44. Heroin seizures in North America have been increasing notably since 2007, surpassing the levels reported in Western and Central Europe in 2012 and 2013. After increasing for six consecutive years, heroin seizures in the United States decreased slightly from 6.2 tons in 2013 to 5.9 tons in 2014. The Mexican authorities reported that Mexico was a transit country for heroin produced in Asia and South America entering the United States, as well as a supplier of nationally produced heroin.²³

Figure VI

Heroin seizures in selected countries and globally (2004-2014)^a (Kilograms)



^a Data for 2014 are preliminary and incomplete.

²⁰ Country report submitted by Pakistan to the Thirty-eighth Meeting of Heads of National Drug Law Enforcement Agencies, Asia and the Pacific.

²¹ *Turkish Drug Report 2014*.

²² *Afghan Opiate Trafficking through the Southern Route*.

²³ Country report submitted by Mexico to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean.

45. Several countries in Africa have reported an increased presence of heroin in their domestic markets, especially in the eastern region. Heroin seizures in the United Republic of Tanzania have increased notably in the last five years, reaching a record 400 kg in 2014, with the drug entering the country mostly via sea, but also via air.²⁴ Kenya reported the unprecedented seizure of the equivalent to 6 tons of heroin, the fifth-highest value reported by a single country in 2014 and a record for the continent, thanks to a single large seizure in August. Although the Kenyan authorities reported that the country was mainly a transit point for heroin from India and Pakistan to Europe and the United States, the consumption within the country was increasing.²⁵

46. In Egypt, a record 613 kg of heroin were seized in 2014, and seizures remained high in 2015 at 516 kg. Egyptian authorities reported that most of the heroin is trafficked from the Golden Crescent and the Golden Triangle areas, particularly from Afghanistan through the Gulf of Aqaba and the eastern borders of the country. There is also evidence of heroin being trafficked into Egypt from East African countries such as Kenya and the United Republic of Tanzania.²⁶

Table 2

Reported heroin seizures in Africa (2012-2015)
(Kilograms)

	2012	2013	2014	2015 ^a
North Africa	111.9	267.1	621.0	-
Egypt	96.1	260.0	613.4	516.0
East Africa	290.2	62.1	6,398.9	-
Kenya	NA	NA	5,986.9	NA
Mauritius	18.3	14.1	12.0	13.1
United Republic of Tanzania	260.0	36.0	400.0	50.2
West and Central Africa	283.8	28.9	75.1	-
Côte d'Ivoire	45.3	4.3	1.8	NA
Ghana	20.3	NA	16.9	NA
Nigeria	211.0	24.5	56.5	NA
Southern Africa	0.4	NA	1.3	-

^a The figures for 2015 are preliminary.

47. The increase in heroin trafficking in Africa has prompted the recent publication of a study by UNODC.²⁷ According to this study, East African countries, where Baluch diasporas appear to be involved in heroin trafficking, were increasingly becoming a major landing point for heroin shipped from Afghanistan to Africa via the Indian Ocean. However, seizure rates of heroin within the subregion

²⁴ Country report submitted by the United Republic of Tanzania to the Twenty-fourth Meeting of Heads of National Drug Law Enforcement Agencies, Africa.

²⁵ Country report submitted by Kenya to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Africa.

²⁶ Country report submitted by Egypt to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Africa.

²⁷ *The Afghan Opiate Trade and Africa: A Baseline Assessment* (March 2016).

remain relatively low. In West Africa, heroin arrives from South/South-West Asia via air, mail and sea, either directly or through East Africa, with established Nigerian crime groups playing a central role in trafficking. Heroin reaches North Africa mainly as detours from the “Balkan route”, from Turkey and the Islamic Republic of Iran through the Near and Middle East, mostly via land. There were growing signs that heroin trafficking to Africa no longer involved solely transit to other regions, but that it was also feeding a burgeoning domestic consumer market. A potential increase in heroin demand in Africa could result in other countries, that previously had limited drug related activity, becoming more vulnerable to the trade.

C. Cocaine

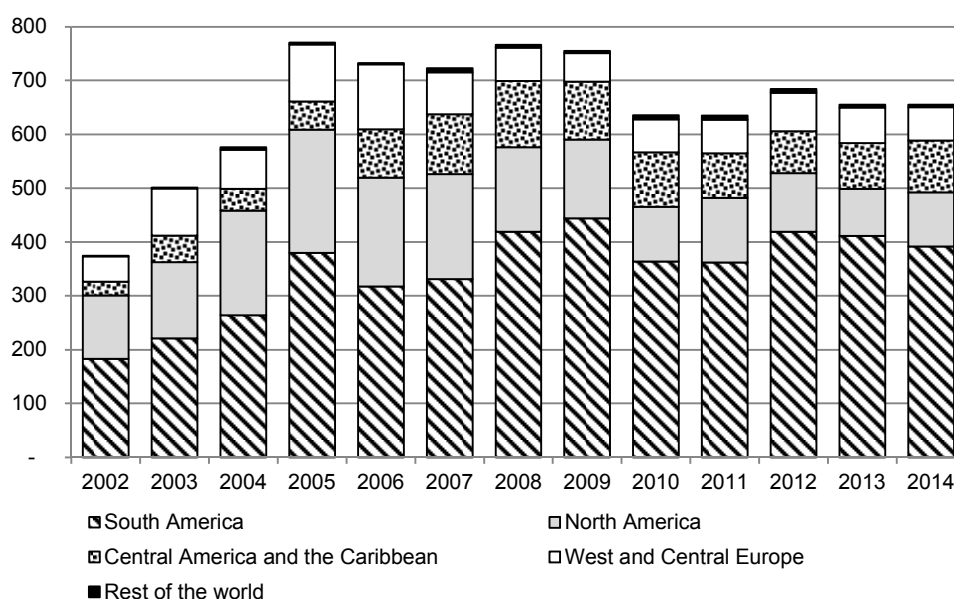
48. The main consumer markets for cocaine in the world, North America and Western and Central Europe, continued to be supplied by cocaine originating in South America. Cocaine from the Andean region is trafficked northwards to North America and across the Atlantic to Europe through the Caribbean or Africa. Available data for 2014 suggest that global cocaine seizures remained stable for the second consecutive year. South America continued to account for the majority of global cocaine seizures, and seizures in the region decreased slightly by 5 per cent with respect to the levels of 2012 and 2013, reaching 392 tons.

49. In 2014, Colombia continued to be the country reporting the largest annual cocaine seizures worldwide, having consistently accounted for more than 30 per cent of global seizures since 2008. Despite a sharp increase in coca bush cultivation and potential cocaine production in Colombia in 2014, seizures in the country decreased for the second consecutive year, from 243 tons in 2012 to 226 in 2013 and 191 tons in 2014. The authorities reported that they frequently met with resistance when conducting supply reduction activities, such as monitoring coca cultivation and cocaine production, which may have had an impact on seizures.²⁸

50. Ecuador and Brazil were the countries with, respectively, the second- and third-highest amounts of cocaine seized in South America in 2014. Cocaine seizures in Ecuador steadily increased from 15.5 tons in 2010 to 53.5 in 2014. The Ecuadorian authorities reported the diversification of transportation and concealment methods by traffickers and the use of new trafficking routes. Cocaine seizures in Brazil increased significantly in 2013 and 2014 compared with previous years, reaching 41.7 and 33.9 tons, respectively, the two highest levels on record for the country. The authorities reported that cocaine entered the country mainly over land, but also in small aircrafts and by river, especially in the Amazon region. Cocaine was then either consumed in the local market or shipped to Europe (directly or through West African countries) in containers and aircraft. Peru, Venezuela (Bolivarian Republic of), Bolivia (Plurinational State of), Chile and Argentina also reported significant amounts of cocaine seized in 2014, with 30, 26, 22, 18 and 13 tons respectively.

²⁸ *World Drug Report 2015*.

Figure VII
Global seizures of cocaine (base, paste and salts) by region, 2002-2014^a
 (Tons)



^a Data for 2014 are preliminary and incomplete.

51. In North America, after decreasing in 2013 to 87 tons, cocaine seizures increased by approximately 15 per cent compared with 2013, reaching 100 tons, although they remained below the values recorded prior to 2010. The majority of cocaine seizures in the region continue to occur in the United States, where almost 95 tons were seized in 2014 (up from 80 tons in 2013). The authorities reported²⁹ that about 13 per cent of cocaine entering the United States was trafficked through the Caribbean (especially the Dominican Republic and Puerto Rico), while the vast majority was transported over land through Central America and Mexico. In some instances, cocaine was also transported directly from South America in container cargo or by couriers on commercial flights.

52. In 2014, nine European countries³⁰ listed Central America and the Caribbean, in particular Costa Rica, the Dominican Republic and Panama, as a transit and departure point for cocaine. During 2014, the two largest reported cocaine seizures in Central America and the Caribbean occurred in Costa Rica and Panama, with 27 and 35 tons respectively. Cocaine seizures in Central America and the Caribbean increased in 2014 to almost 95 tons (85 tons in 2013), partly due to a sharp increase in Honduras, where seizures reached more than 12 tons (compared with 1.7 tons in 2013).

53. Cocaine seizures in Western and Central Europe peaked at 121 tons in 2006, and have remained stable since 2008, with an average of 62 tons. In 2014, cocaine seizures in the region amounted to 62 tons. As a major point of entry for cocaine from the Andean region into Europe, mostly by sea, Spain continued to be the

²⁹ United States Department of Justice, Drug Enforcement Agency, *2014 National Drug Threat Assessment*.

³⁰ Belgium, Germany, Greece, Italy, Netherlands, Portugal, Spain, Sweden and Switzerland.

European country reporting the highest amount of cocaine seized in 2014, with 21.7 tons, down from 26.7 tons in 2013. While Belgium, the Netherlands and France reported cocaine seizures for 9.3, 8.8 and 6.9 tons respectively in 2014, Italy, Portugal and the United Kingdom each reported seizing between 3 and 4 tons of cocaine.

54. A secondary route for cocaine trafficked across the Atlantic to Europe involved the use of countries in Africa, notably West Africa, as transit points. After reaching the highest level on record in 2013 with 901 kg, cocaine seizures in Ghana remained high at 464 kg in 2014. Annual cocaine seizures in Nigeria have remained above the 100 kg mark since 2003, reaching 226 kg in 2014. Morocco recorded the highest amount of cocaine seized since 2005, with 632 kg in 2014. Moroccan authorities noticed an increase in cocaine seizures since a commercial air route was opened between Morocco and Brazil.³¹ In their responses to part IV of the annual report questionnaire for 2014, Ghana, Nigeria and Morocco reported Brazil as the main source country, with cocaine entering the countries mostly by means of commercial flights.

55. Due in part to the increased trafficking between South America and Africa, countries such as Angola, Botswana, Egypt, Senegal and Zambia have noticed an increase in cocaine consumption in recent years,³² suggesting that the region may be starting to become a destination for the drug. In Egypt, authorities reported the detection of smuggling of cocaine via sea and air from Jordan and Europe respectively, in an effort by international criminal networks to open new markets in the country.³³ Angolan authorities reported that “crack” cocaine production in the country is rising substantially, being distributed within national borders as well as into Namibia and the Democratic Republic of the Congo.³⁴

D. Amphetamine-type stimulants

56. Amphetamine-type stimulants can be broadly classified as amphetamines (which include amphetamine and methamphetamine) and “ecstasy”-type substances.³⁵ 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.

57. Between 2008 and 2011, the number of seizures of amphetamine-type stimulants increased rapidly, with total seizures rising by more than 150 per cent to more than 144 tons in 2011. The increase is attributable primarily to the growing number of global methamphetamine seizures, which increased almost fivefold during the period. After remaining stable in 2012, global seizures of amphetamine-type stimulants decreased in 2013 to 134 tons, thanks to the first

³¹ Country report submitted by Morocco to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Africa.

³² Country reports submitted by Angola, Botswana, Egypt, Senegal and Zambia to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Africa.

³³ Country report submitted by Egypt to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Africa.

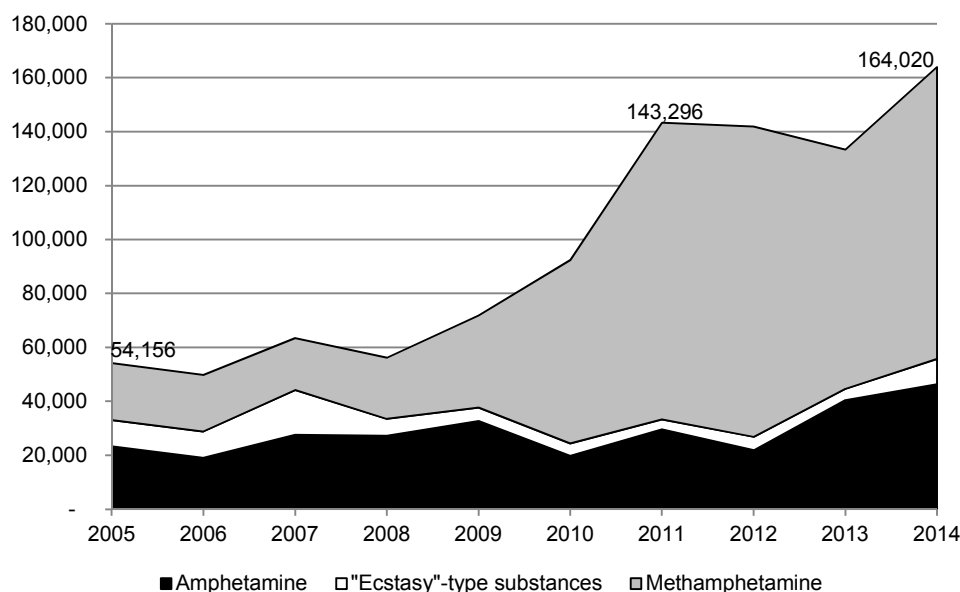
³⁴ Country report submitted by Angola to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Africa.

³⁵ This includes 3,4-methylenedioxymethamphetamine (MDMA).

global decrease in methamphetamine seizures since 2007. In 2014, global seizures of amphetamine-type stimulants have increased again, reaching record levels.

Figure VIII

Global seizures of amphetamine-type stimulants, by drug type (2005-2014)^a
(Kilograms)



^a Data for 2014 are preliminary and incomplete.

Methamphetamine

58. 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 those consumer markets. However, it has recently also spread to other countries, where diverse methods of manufacture are used.³⁶

59. In Asia-Pacific, methamphetamine seizures have been increasing steadily since 2008, with the total amount seized in the region increasing fourfold over the period 2008-2013. 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 crystal methamphetamine being spread throughout the region.³⁷

60. Between 2009 and 2014, methamphetamine seizures increased significantly in Australia — where the drug enters the country by commercial cargo and post (by sea and air) — from 150 kg to more than 7 tons. During the same period, China saw an increase in annual methamphetamine seizures from 6.6 to 27 tons. Several other countries in the region have consistently reported annual seizures for over

³⁶ UNODC, *Global SMART Update, vol. 12* (September 2014).

³⁷ 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).

500 kg, including Indonesia, Japan, the Lao People's Democratic Republic, Malaysia, Myanmar, the Philippines and Thailand. The Japanese authorities reported that China was the main source of the methamphetamine seized in Japan. However, in recent years there has been a diversification of sources, with methamphetamine entering the country from China, Hong Kong Special Administrative Region; Mexico; Thailand; and West Africa.³⁸

61. In North America, methamphetamine seizures increased sharply in 2014. The United States reported the highest level of methamphetamine seized since 2001 — 31.2 tons, up from 22.9 tons in 2013. Methamphetamine seizures in Mexico increased by 10 per cent from 17.9 tons in 2013 to 19.7 tons in 2014. The Mexican authorities reported that methamphetamine was produced in clandestine laboratories using chemical precursors, most of which were trafficked by sea from China, Japan and Singapore.³⁹

62. According to the available data, methamphetamine seizures in Africa have increased notably since 2012. While no African country had reported annual seizures for more than 100 kg before then, in 2012, the Niger and South Africa both reported annual methamphetamine seizures for 539 and 347 kg respectively. In 2013 and 2014, Nigeria reported seizing 349 and 119 kg of methamphetamine respectively. Nigerian authorities reported the discovery of ten methamphetamine laboratories since 2012, an indication that Nigeria is becoming a methamphetamine producing country.⁴⁰

Amphetamine

63. With the exception of 2013, Saudi Arabia has reported the largest seizures of amphetamine in the world since 2003, accounting for between 30 and 50 per cent of global seizures. In 2014, authorities of Saudi Arabia have reported a record 17 tons of amphetamine seized. Global amphetamine seizures increased sharply in 2013-2014 and continue to be concentrated mainly in the Near and Middle East, with countries, such as Lebanon and Jordan, also reporting over 5 tons seized each in 2014.

64. Other regions, such as Western and Central Europe, have also traditionally reported significant seizures of amphetamine. Some countries, including the United Kingdom, the Netherlands and Germany, continued to frequently report the seizure of more than one ton of amphetamine annually. Since 2012, there has been evidence of increased amphetamine trafficking in North America, in particular in the United States. In 2013, the United States reported the highest amount of amphetamine seized by a single State, surpassing Saudi Arabia by 12 tons. In 2014, seizures in the United States remained high at 4.3 tons.

65. There is evidence of increased amphetamine trafficking in Africa in recent years, with unprecedented multi-ton seizures being reported by African countries in 2013 and 2014. In 2013, Côte d'Ivoire reported seizures for 1,254 kg of

³⁸ Country report submitted by Japan to the Thirty-ninth Meeting of Heads of National Drug Law Enforcement Agencies, Asia and the Pacific.

³⁹ Country report submitted by Mexico to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean.

⁴⁰ Country report submitted by Nigeria to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Africa.

amphetamine, while the Sudan reported seizures for 3,543 kg in 2014, the highest value by a single country outside the Near and Middle East and North America that year.

“Ecstasy”-type substances

66. In 2014, global seizures of “ecstasy”-type substances increased significantly, from 4.2 tons in 2013 to 9.2 tons. That 117 per cent increase was largely due to significant seizures reported by Australia, where more than 4.3 tons of 3,4-methylenedioxymethamphetamine (MDMA) were seized in 2014 (compared with 343 kg in 2013), owing in part to a single 1.9-ton seizure. In 2014, Myanmar also reported the largest ever single seizure of “ecstasy”-type substances on record, capturing 2.4 million tablets (717 kilograms).

67. These large seizures in Australia and Myanmar, together with a general increase in the amount of “ecstasy”-type substances being seized in East and South-East Asia in recent years, may point to the Asia-Pacific region as a new focus of the “ecstasy” market.⁴¹ Seizures of “ecstasy”-type substances in Western and Central Europe and North America, where the market has traditionally been concentrated, have decreased notably over the last decade.

68. The reported amount of “ecstasy”-type substances seized by African countries in 2014 remained at very low levels (less than 3 kilograms). Morocco, Egypt and Botswana were the only countries in Africa to consistently report seizing “ecstasy”-type substances during the 2012-2014 period. Egyptian authorities reported the presence of “ecstasy” in the country, being smuggled mostly via mail from Europe and North America.⁴²

IV. Conclusions

69. The cultivation of cannabis continues in most countries and in all regions of the world, while the production of cannabis resin remains confined to a few countries. Globally, preliminary data suggest that both cannabis herb and resin seizures remained stable in 2014. In Africa, cannabis herb seizures remained stable in 2014, while cannabis resin seizures increased and continue to be concentrated in North Africa.

70. After reaching record levels in 2014, annual estimates of the area under opium poppy cultivation in Afghanistan decreased in 2015 for the first time in five years. In South-East Asia, the area under opium poppy cultivation remained stable in 2014 and decreased slightly in 2015 after increasing steadily for nine consecutive years. Global seizures of opium and illicit morphine remain concentrated in Afghanistan and neighbouring countries, while heroin seizures cover a wider geographic area, with significant seizures in North America, Europe, the Near and Middle East/South-West Asia, and East and South-East Asia. East African countries are also increasingly playing important roles as transit points for heroin being trafficked via the “Southern route”. Global heroin seizures have remained stable since 2008 and this trend continued in 2014. Increased heroin trafficking into Africa from

⁴¹ *The Challenge of Synthetic Drugs in East and South-East Asia and Oceania: Trends and Patterns of Amphetamine-type Stimulants and New Psychoactive Substances.*

⁴² Country report submitted by Egypt to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Africa.

South-West Asia has resulted in record heroin seizures levels in the region in 2014, notably a single six-ton seizure made by Kenya.

71. Three Andean countries continue to account for virtually all cultivation of coca bush worldwide, and the total area under coca bush cultivation increased in 2014, as a result of a sharp increase in Colombia. Global cocaine seizures remained stable in 2014, with South America continuing to account for the majority of global cocaine seizures. African countries, in particular those in West Africa, remain transit points for cocaine trafficked to the consumer markets of Europe. African countries are also increasingly being targeted as cocaine consumption markets by international trafficking groups.

72. After decreasing in 2013 for the first time since 2008, global seizures of amphetamine-type stimulants increased in 2014, reaching record levels. Global methamphetamine seizures increased in 2014, where they were most prominent in North America and East and South-East Asia. There is new evidence of regional shifts in both the amphetamine and “ecstasy” markets. In 2014, trafficking of amphetamine appears to have increased in North America in recent years, while seizures of “ecstasy”-type substances were concentrated in the Asia-Pacific. There is evidence of an increased presence of amphetamine and methamphetamine in Africa, with multi-ton amphetamine seizures occurring in 2013 and 2014, in Côte d’Ivoire and the Sudan respectively, and the detection of methamphetamine production laboratories in Nigeria.
