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**World situation with regard to drug trafficking
and recommendations of the subsidiary bodies of
the Commission****World situation with regard to drug trafficking****Report of the Secretariat***Summary*

The present report provides an overview of the latest trends in the illicit production of and trafficking in drugs worldwide. The statistics and analysis in the report are based on the latest information available to the United Nations Office on Drugs and Crime. The report presents trends in drug seizures and statistics on the illicit cultivation of drug crops up to 2014 and, where available, 2015.

Illicit opium poppy cultivation remains concentrated in Afghanistan, where cultivation decreased in 2015 after reaching record levels in 2014. The majority of opium and morphine seizures continue to occur in Afghanistan and neighbouring countries, while heroin seizures occur over a wider geographic area. Coca bush cultivation and the quantity of cocaine seized globally increased in 2014, with South American countries continuing to account for the majority of cocaine seizures made worldwide. Preliminary data suggest that global seizures of amphetamine-type stimulants increased in 2014. The cultivation of cannabis herb continues in most countries worldwide and in all regions of the world, while the production of cannabis resin remains confined to a few countries.

* E/CN.7/2016/1.



I. Introduction

1. The present report provides an overview of developments in the production of and trafficking in the main illicit drugs at the global and regional levels. The analysis includes information available to the United Nations Office on Drugs and Crime (UNODC) up to November 2015.

2. Section II 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.

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 2014 provide the primary source of information on drug trafficking patterns and seizures of illicit drugs.

4. As at 1 November 2015, UNODC had received replies to part IV of the annual report questionnaire from 92 Member States and two territories. Supplementary sources of information include official published government reports and reports submitted to the subsidiary bodies of the Commission on Narcotic Drugs. The *World Drug Report 2015*¹ also aided the analysis of the current situation with regard to drug trafficking. In total, seizure data for 2014 was available for 108 States and territories.

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

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

A. Cannabis herb cultivation and cannabis resin production

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

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

¹ United Nations publication, Sales No. E.15.XI.6.

8. Morocco reported eradicating 5,000 ha of cannabis in 2013 and estimated that, after eradication, 42,000 ha remained under cannabis cultivation. This represents a reduction of almost 70 per cent compared with 2003 levels (134,000 ha).² Morocco reported a stable trend with regard to the area under illicit cannabis cultivation in 2013 and a decrease in the production of cannabis resin, which amounted to 700 tons (down from 3,040 tons in 2003).

9. Afghanistan, despite having a significantly smaller estimated area under cannabis cultivation than Morocco (10,000 ha in 2012), had a potential cannabis resin production estimated at 1,400 tons, almost double the estimated production in Morocco. This represents an increase of 8 per cent compared with 2011. In 2013, cannabis cultivation in Afghanistan remained linked to opium poppy cultivation, with 38 per cent of poppy-growing villages also reporting cannabis cultivation, compared with only 5 per cent of non-poppy-growing villages.³

B. Opium poppy cultivation

10. Afghanistan and Myanmar continued to account for the majority of illicit opium poppy cultivation worldwide. Cultivation in Myanmar remained stable in 2014, after increasing steadily between 2006 and 2013, while Afghanistan saw in 2015 the first decrease in opium poppy cultivation since 2009. Global opium poppy cultivation increased by about 5 per cent in 2014, owing mainly to an increase in Afghanistan.

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 tons⁴ in 2015, about half the level of 2014 (6,400 tons).

12. The *South-East Asia Opium Survey 2014* estimated that illicit opium poppy cultivation in the region covered more than 63,800 ha. Despite official reports of opium poppy eradication, opium poppy cultivation in South-East Asia has nearly tripled since 2006. After steadily increasing from 21,600 ha in 2006 to 57,800 ha in 2013, opium poppy cultivation in Myanmar remained stable in 2014 at 57,600 ha. In the Lao People's Democratic Republic, cultivation steadily increased from 1,500 ha in 2007 to 6,800 ha in 2012. In 2014, estimated cultivation in the Lao People's Democratic Republic reached 6,200 ha.

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 is notably

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

³ UNODC and Ministry of Counter Narcotics of Afghanistan, *Afghanistan Opium Survey 2013* (Vienna, December 2013).

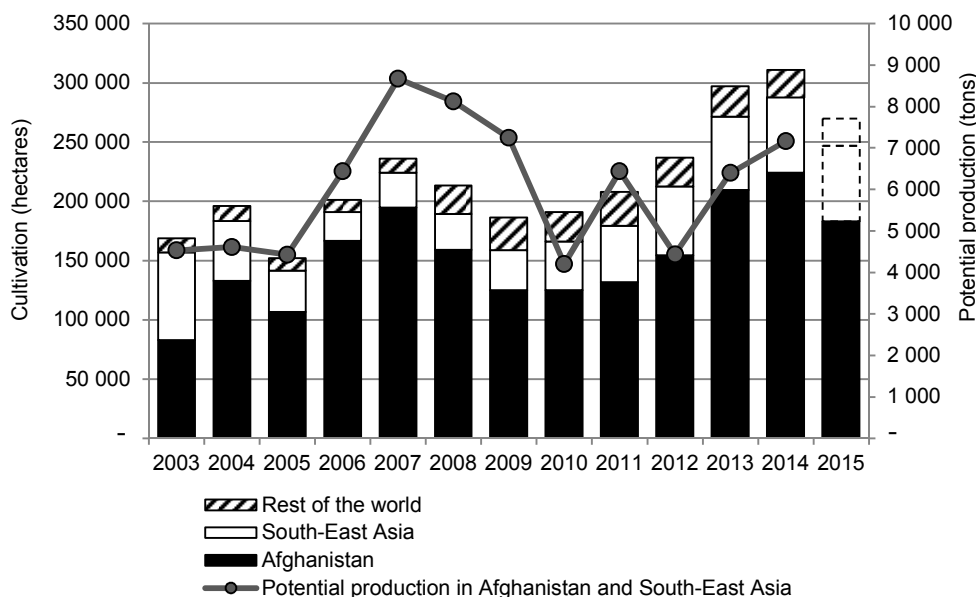
⁴ In the present report, the term "tons" refers to metric tons (1,000 kg, or 2,204.6 lb).

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 decreased from 15 kg per ha in 2013 to 11.7 kg per ha in 2014. Overall, the two countries produced an estimated total of 762 tons of opium in 2014, a decrease of 23 per cent compared with 2013.

14. More than 92 per cent of global opium poppy cultivation in 2014 took place in Afghanistan and South-East Asia. Although data on poppy cultivation outside those areas is scarce, such cultivation has been reported in the Americas, specifically in Colombia and Mexico, where heroin is also produced. The Mexican authorities reported eradicating 21,445 ha of opium poppy in 2014, almost a 50 per cent increase compared with 2013. Colombia reported the eradication of 813 ha in 2014, up from 514 ha in 2013, as well as the dismantling of one heroin laboratory every year from 2011 to 2014. The area under opium poppy cultivation in Colombia has declined notably since 2004 and was estimated at 387 ha in 2014, with a potential annual heroin production of 1 ton.⁵

15. While India is the only country in the world that produces opium gum for pharmaceutical purposes, the illicit cultivation of opium poppy still occurs in certain pockets of the country, and authorities reported the destruction of 2,470 acres of poppy in 2014.⁶ There is also evidence of opium poppy cultivation in Africa, with Swaziland estimating the cultivated area at 430 ha in 2014, after the eradication of 1,070 ha that year.

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, cultivation figures were available only for Afghanistan for 2015. The chart shows indicative global cultivation for 2015 based on cultivation in the previous year.

⁵ UNODC and Government of Colombia, *Colombia: Coca Cultivation Survey 2014* (July 2015).

⁶ Country report submitted by India to the Thirty-ninth Meeting of Heads of National Drug Law Enforcement Agencies, Asia and the Pacific, held in Bangkok from 19 to 22 October 2015.

C. Coca cultivation

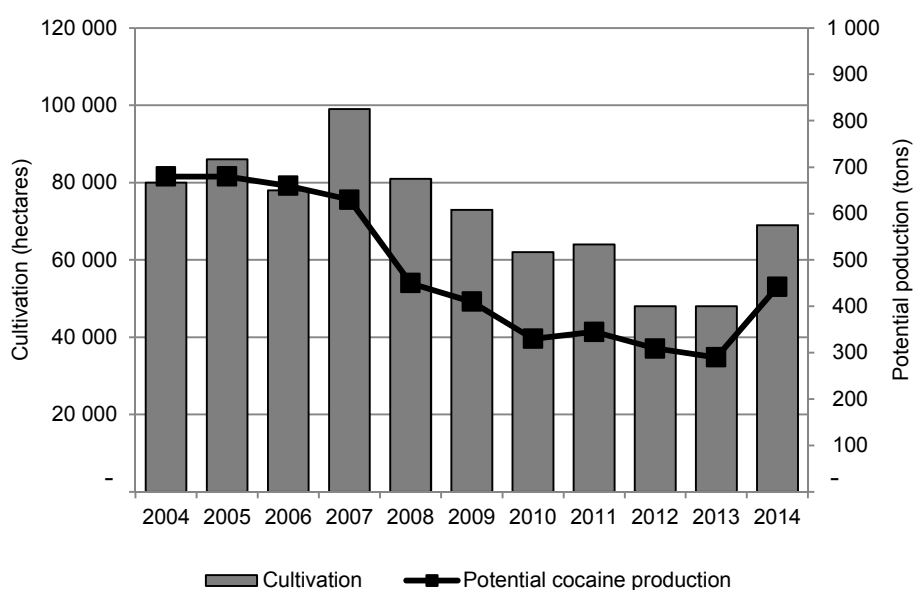
16. Bolivia (Plurinational State of), Colombia and Peru continued to account for virtually all cultivation of coca bush worldwide. The total area under cultivation in the three countries increased by 10 per cent from 120,800 ha in 2013 to 132,500 ha in 2014, the most significant increase since 2007. 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.

17. 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. The number of departments affected by cultivation decreased from 23 to 21 and the vast majority (84 per cent) of coca crops identified in 2014 were situated within one kilometre of coca crops detected in 2013. This shows that the expansion observed in 2014 did not enter new communities; rather, existing communities have found incentives to expand their cultivation areas. 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.

18. 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 mainly to the increase in the area under cultivation, an increase in the yield and lesser impact in terms of spraying and manual eradication. While the average yield per hectare increased by about 14 per cent in 2014 compared with 2013, manual eradication in Colombia has decreased every year since peaking in 2008. Aerial spraying decreased drastically in 2013 and remained low in 2014, marking the lowest level since 2000. During 2014, the Colombian authorities destroyed a total of 2,446 laboratories for the extraction of coca paste or cocaine base, as well as 168 cocaine hydrochloride laboratories.

Figure II

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



19. 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. Satellite images and ground surveys showed reductions in the two main areas of cultivation, Yungas de La Paz and Trópico de Cochabamba, which accounted for 99 per cent of the area under coca bush cultivation.

20. The manual eradication of coca bush in the Plurinational State of Bolivia remained stable in 2014, reaching 11,144 ha. 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.

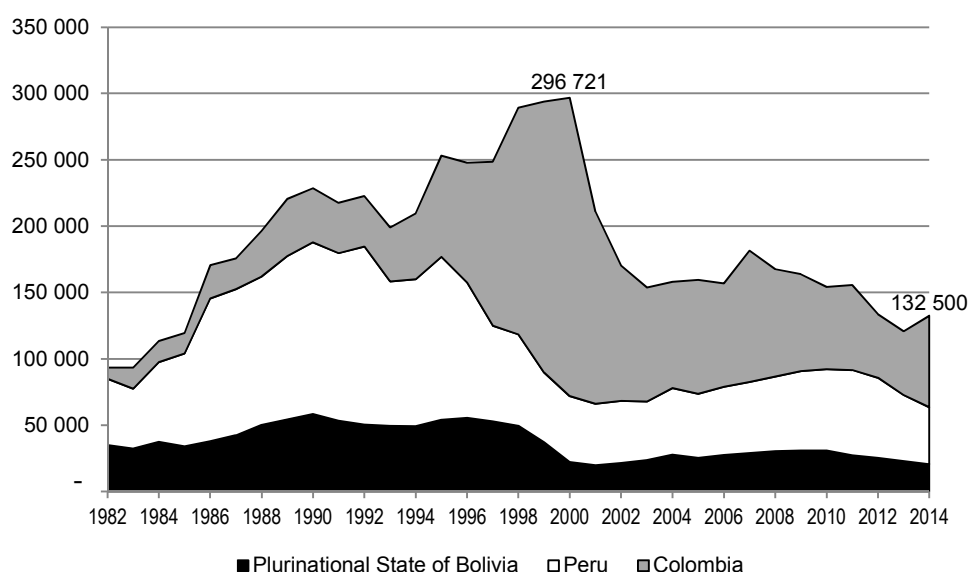
21. According to the 2014 national coca crop monitoring survey conducted by UNODC and the Government of Peru, the area under coca bush cultivation in Peru at the end of 2014 stood at 42,900 ha, a 14 per cent decrease compared with 2013 (49,800 ha), and the lowest level recorded since the 1970s.

22. Planned eradication by the Peruvian authorities has been the main factor behind the reduction. After successfully containing the expansion of coca bush cultivation in 2012, the authorities have focused their efforts on reducing the area under cultivation. In 2014, the reductions were concentrated in areas such as Aguaytía, Alto Huallaga and Pichis-Palcazú-Pachitea, and eradication increased by more than 30 per cent compared with 2013, reaching a total of 32,500 ha. Authorities reported⁷ that the State's eradication efforts in recent years had caused drug-trafficking organizations to shift illicit cultivation to increasingly scattered and isolated areas.

23. 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 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.

⁷ Country report submitted by Peru to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean, held in San Pedro Sula, Honduras, from 5 to 9 October 2015.

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

24. Table 1 shows the quantities of the major drug types seized globally and reported to UNODC in 2012, 2013 and 2014, and the estimated trend in 2014.

Table 1
Global drug seizures and trends, 2012, 2013 and 2014

Drug type	2012 seizures (kilograms)	2013 seizures (kilograms)	2014 seizures (kilograms)	2014 trend ^(a,b)
Cannabis herb	5 498 824	5 671 708	5 851 959	Decrease (-10%)
Cannabis resin	1 268 896	1 416 482	1 429 275	Stable (+1%)
Opium	556 615	634 347	526 788	Decrease (-17%)
Heroin	71 780	77 635	79 246	Stable
Illicit morphine	52 274	38 472	20 901	Decrease (-45%)
Cocaine ^c	684 075	660 187	671 438	Stable (2%)
Methamphetamine	115 123	89 287	95 351	Increase
Amphetamine	21 852	31 607	23 964	Decrease
“Ecstasy”-type substances	4 944	4 199	7 853	Increase (87%)

^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 was available for both 2013 and 2014. Totals for 2014 are preliminary and are likely to understate the total amount seized.

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

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

25. The estimated annual trend in global drug seizures for 2014 is based on the quantities of narcotic drugs seized by Member States and reported to UNODC by the time of analysis. Member States with seizure data available for both 2013 and 2014 were included in the estimation of the trend.

A. Cannabis

Cannabis herb

26. After decreasing significantly in 2012 and remaining stable in 2013, global cannabis herb seizures decreased further in 2014 to their lowest level since 2000, owing mainly to a decline in North America.

27. 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. In addition, while the amount of cannabis herb leaving the country by land decreased by 25 per cent in 2014, the volume moving outbound by sea increased by the same proportion.⁸

28. 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 South America 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 10 per cent to reach 1,434 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. The Paraguayan authorities reported that cannabis herb continues to be produced and trafficked to neighbouring countries and Chile, and underlined the need to quantify and monitor areas of cultivation in order to take more effective action.⁹

29. In Africa, the relatively limited amount of data makes the analysis of trends related to cannabis herb at the regional and subregional levels challenging.¹⁰ In 2014, Egypt, Morocco and Nigeria reported seizing more than 100 tons of cannabis herb each, with 396, 155 and 159 tons, respectively. At the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Africa, held in Algiers from 14 to 18 September 2015,¹¹ participants observed that cannabis cultivation, production, trafficking and illicit use affected all parts of Africa and remained a major concern for countries in the region.

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

⁹ Country report submitted by Paraguay to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean.

¹⁰ At the time of the preparation of the present report, 11 African countries had completed part IV of the annual report questionnaire for 2014.

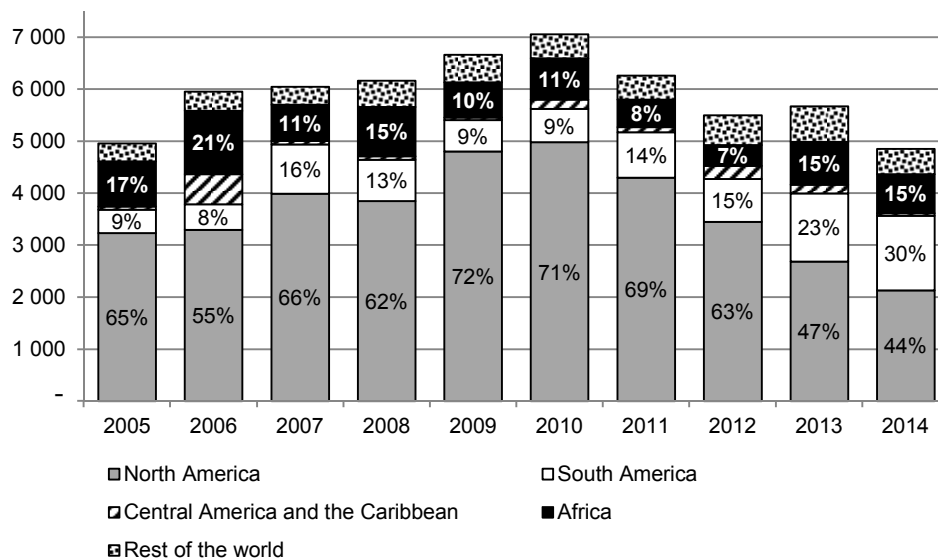
¹¹ See UNODC/HONLAF/25/6.

30. Preliminary data suggest that cannabis herb seizures in Europe declined significantly in 2014, owing mainly to a sharp decrease in Turkey. After increasing consistently from less than 7 tons in 2004 to more than 180 tons in 2013, annual cannabis herb seizures in Turkey decreased for the first time in a decade to 92 tons in 2014. 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.¹²

Figure IV

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

(Tons)



^a Data for 2014 are preliminary and incomplete.

31. According to available data, cannabis herb seizures in Asia decreased by more than 20 per cent in 2014. However, trends vary among different subregions, with sharp decreases in all reporting countries within South Asia in 2014¹³ and notable increases in East and South-East Asia, where seizures almost doubled thanks mainly to the 68 tons seized in Indonesia. While historically cannabis herb seizures in the region had been concentrated in South Asia, in 2014 East and South-East Asia accounted for the majority of cannabis herb seizures in Asia.

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, in South-West Asia and in Western and Central Europe, which is one of the main

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

¹³ Bangladesh, India and Sri Lanka.

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).

33. 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 2014 reaching almost 380 tons, an increase of 19 per cent compared with 2013. Although the number of cases decreased in Spain in 2014, the average seizure weight increased by more than 20 per cent,¹⁴ which indicates that traffickers are transporting larger amounts per trip. 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.

34. Cannabis resin seizures in North Africa have increased every year since 2009. 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. The Moroccan authorities reported that the increase was a consequence of major efforts undertaken in coordination with Spain.¹⁵

35. Other North African countries reporting significant amounts of cannabis resin seized in 2014 were Algeria and Egypt. After increasing tenfold between 2010 and 2013, cannabis resin seizures in Algeria decreased by 14 per cent in 2014 to 182 tons (compared with 212 tons in 2013), but remained significantly above 2012 levels and those of previous years. Similarly, after reaching a record level of 84 tons in 2013, cannabis resin seizures in Egypt decreased to 55 tons in 2014, which was three times the highest level observed prior to 2013. 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).¹⁶

36. 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. Seizures in the Islamic Republic of Iran have followed a relatively stable trend in the past 10 years, with 78 tons of cannabis resin seized in 2014 (compared with 76 tons in 2013). After reaching a record 313 tons in 2013, cannabis resin seizures in Pakistan decreased to 231 tons in 2014, the second-highest value since 2000. 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. Cannabis resin seizures in Afghanistan increased from 32 tons in 2013 to 43 tons in 2014.

¹⁴ Country report submitted by Spain to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Africa, held in Algiers from 14 to 18 September 2015.

¹⁵ Country report submitted by Morocco to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Africa.

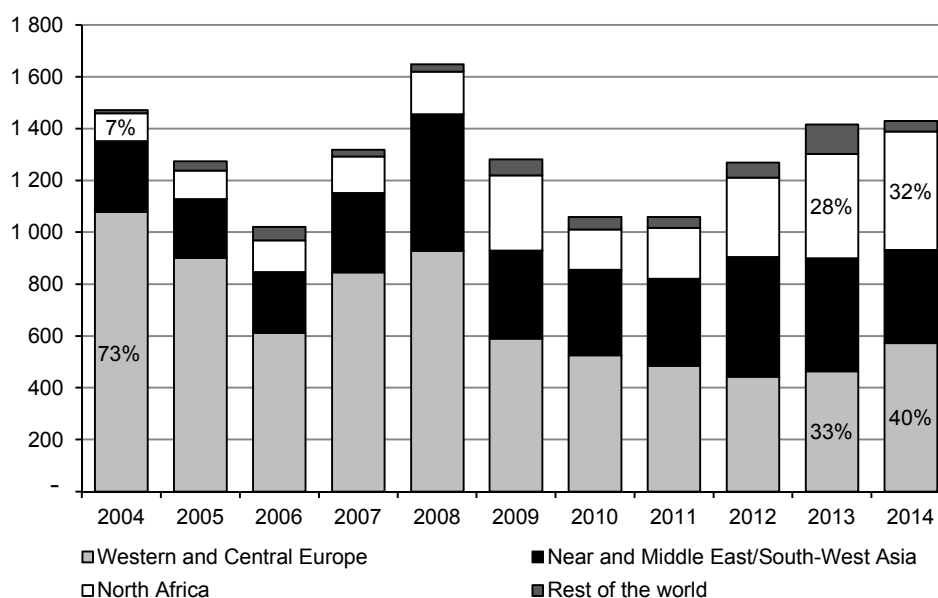
¹⁶ Country report by Egypt to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Africa.

37. The Turkish authorities reported the trafficking of cannabis resin into the country through Iran (Islamic Republic of) and the Syrian Arab Republic.¹⁷ 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.

Figure V

Global cannabis resin seizures, by region (2004-2014)

(Tons)

**B. Opiates****Opium**

38. 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 (see figure VI). Available data for 2014 suggest that global opium seizures have decreased again, driven mainly by a decrease in the Islamic Republic of Iran.

39. Since 2004, three countries — Afghanistan, Iran (Islamic Republic of) and Pakistan — have consistently accounted for more than 90 per cent of global opium seizures each year, and that trend continued in 2014. The Islamic Republic of Iran remains the country reporting the largest annual opium seizures. In 2014, seizures decreased by 10 per cent to 393 tons. In Pakistan, opium seizures increased for the fifth consecutive year, reaching 46 tons in 2014, while in Afghanistan, opium seizures decreased from 116 tons in 2013 to 66 tons in 2014.

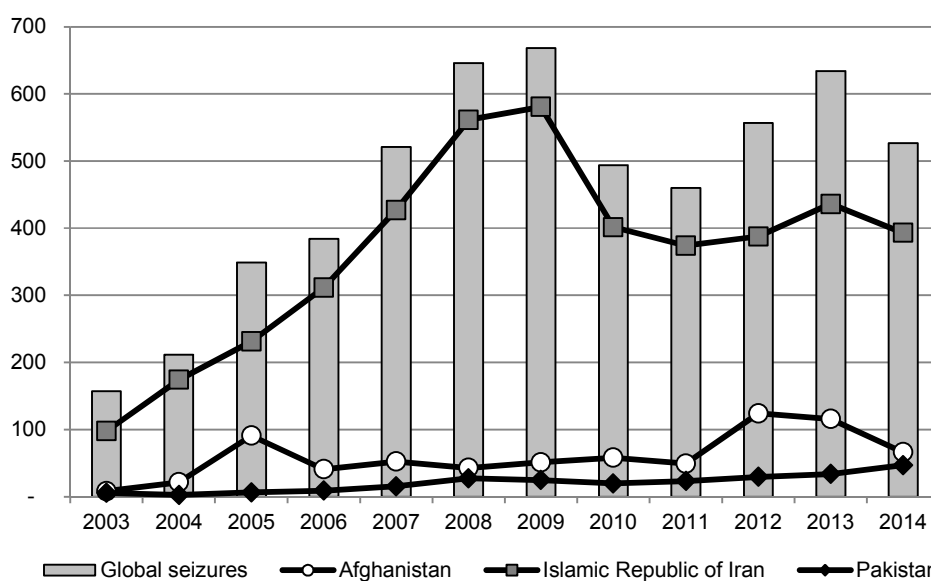
¹⁷ Turkish National Police, Department of Anti-Smuggling and Organized Crime, *Turkish Drug Report 2014* (Ankara, 2014).

40. 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, 3,398 kg. Other countries with significant opium seizures in 2014 were India (more than 4,200 kg), China (1,741 kg) and Australia (1,558 kg). While all of the opium seized in China in 2014 originated in Myanmar and the Lao People's Democratic Republic, more than 98 per cent of the opium seized in Australia entered the country from India, by sea, air or mail.

Figure VI

Opium seizures in selected countries and worldwide (2003-2014)

(Tons)

**Illicit morphine**

41. As with opium, seizures of illicit morphine continued to be concentrated in Afghanistan and neighbouring countries. Every year from 2005 onwards, Afghanistan, Iran (Islamic Republic of) and Pakistan together accounted for more than 90 per cent of global morphine seizures (96 per cent in 2014). In 2014, global morphine seizures decreased for the second consecutive year, driven mostly by a decline in Afghanistan. In Iran (Islamic Republic of), seizures increased for the third consecutive year in 2014, to 12.7 tons, from 10.4 tons in 2013.

42. After increasing from 1.4 tons in 2012 to 3.8 tons in 2013, seizures of illicit morphine in Pakistan decreased to 1.1 tons in 2014. Pakistan reported that 100 per cent of the illicit morphine seized originated in Afghanistan, with the Islamic Republic of Iran the main final destination.

43. Afghanistan reported that 6.4 tons of illicit morphine was seized in 2014, down from 24 tons in 2013. It was the country with the highest annual seizures of illicit morphine worldwide every year between 2011 and 2013, with an average of almost 44 tons during the period.

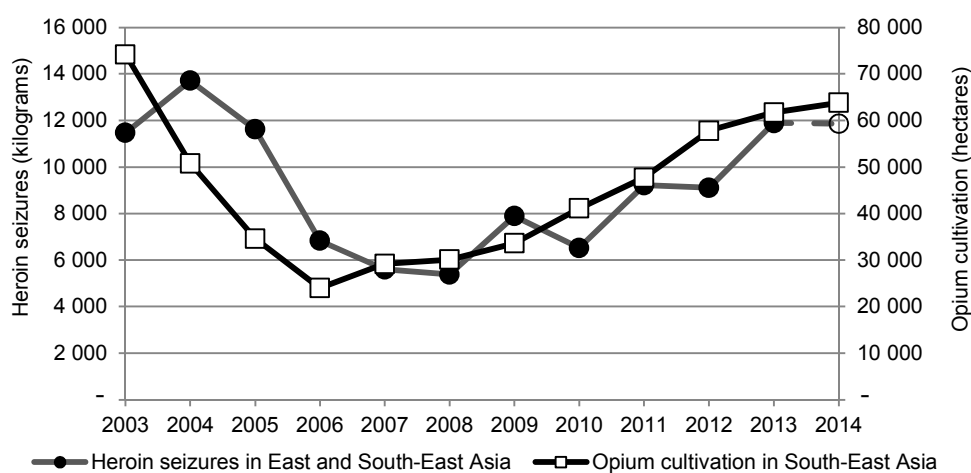
Heroin

44. 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.¹⁸ 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.¹⁹ The "northern route" continues to link heroin from Afghanistan to markets in the Russian Federation.²⁰ In North America, the United States is supplied largely by Latin America, while the majority of heroin entering Canada is of Afghan origin.²¹

45. 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. The Golden Triangle continues to be the main source of heroin; however the Chinese authorities reported that Afghan heroin reaches the country by sea, land, air and mail.²² 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). Total seizures in the region follow a trend similar to that of total opium cultivation in the Lao People's Democratic Republic and Myanmar (see figure VII), which also remained stable in 2014.

Figure VII

Heroin seizures in East and South-East Asia and opium cultivation in the Lao People's Democratic Republic and Myanmar (2003-2014)^a



^a The total amount of heroin seized in 2014 as shown corresponds to an estimate based on incomplete data.

¹⁸ "Asia-Pacific" refers to the regions of East and South-East Asia and Oceania together.

¹⁹ UNODC, *Afghan Opiate Trafficking through the Southern Route* (Vienna, June 2015).

²⁰ UNODC, *The Illicit Drug Trade through South-Eastern Europe* (Vienna, March 2014).

²¹ *World Drug Report 2015* and annual report questionnaire for 2014.

²² Country report submitted by China to the Thirty-ninth Meeting of Heads of National Drug Law Enforcement Agencies, Asia and the Pacific.

46. 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 Pakistan,²³ while the Turkish authorities cite heroin production in Afghanistan as the source of most of the heroin seized in the country.²⁴ 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.

47. 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. Evidence is emerging of innovation in the supply of heroin to markets in Europe, including the recent detection of heroin-processing laboratories in the region and evidence of adaptation in heroin trafficking routes and in the modus operandi of criminal groups.²⁵ 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”.²⁶

48. Various regions in Africa are developing significant roles in facilitating the transit of heroin by the “southern route”, with networks on the continent taking control over trafficking routes.²⁷ Kenya reported the unprecedented seizure of 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. The Kenyan authorities reported that Kenya was a transit point for heroin departing from India and Pakistan, which arrived as concealed cargo by sea and air and was exported to Europe or North America, either directly or through West African countries.²⁸ Heroin seizures also increased significantly in the United Republic of Tanzania, from 26 kg in 2013 to 220 kg in 2014.

49. In Central Asia, heroin seizures in 2013 were significantly lower than those reported between 2001 and 2008, when they averaged almost 5 tons per year. Seizures in the region have followed a generally decreasing trend since 2009. In 2014, seizures increased sharply to more than 3 tons, from 1.8 tons in 2013, owing mainly to a large single seizure of more than 800 kg reported by Armenia.

²³ Country report submitted by Pakistan to the Thirty-eighth Meeting of Heads of National Drug Law Enforcement Agencies, Asia and the Pacific.

²⁴ *Turkish Drug Report 2014*.

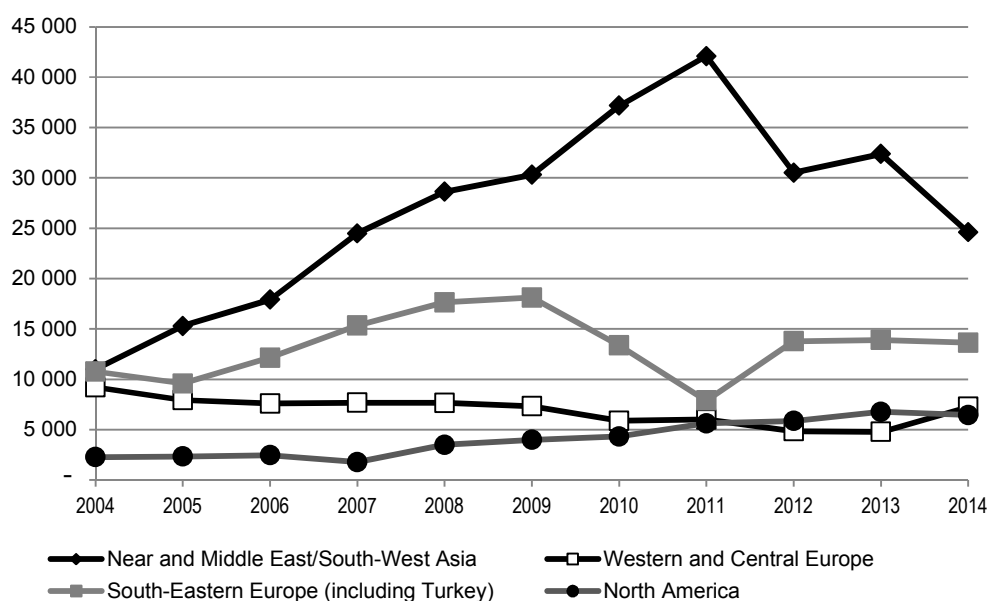
²⁵ *European Drug Report: Trends and Developments 2015*.

²⁶ *Afghan Opiate Trafficking through the Southern Route*.

²⁷ *Ibid.*

²⁸ Country report submitted by Kenya to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Africa.

Figure VIII
Heroin seizures in selected regions (2003-2014)
 (Kilograms)



50. While in Oceania the sources of heroin have alternated between Afghanistan and South-East Asia, with the latter predominating in recent years, in South Asia, India appears to be the main destination for Afghan heroin in the region.²⁹ In 2014, heroin seizures in India decreased by 42 per cent compared with 2013, reaching 841 kg, and Sri Lanka recorded seizures of more than 300 kg for the second consecutive year.

51. In the Americas, six countries³⁰ seized more than 100 kg of heroin in 2014. 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.³¹

C. Cocaine

52. 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

²⁹ *Afghan Opiate Trafficking through the Southern Route*.

³⁰ Canada, Colombia, Ecuador, Guatemala, Mexico and United States of America.

³¹ Country report submitted by Mexico to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean.

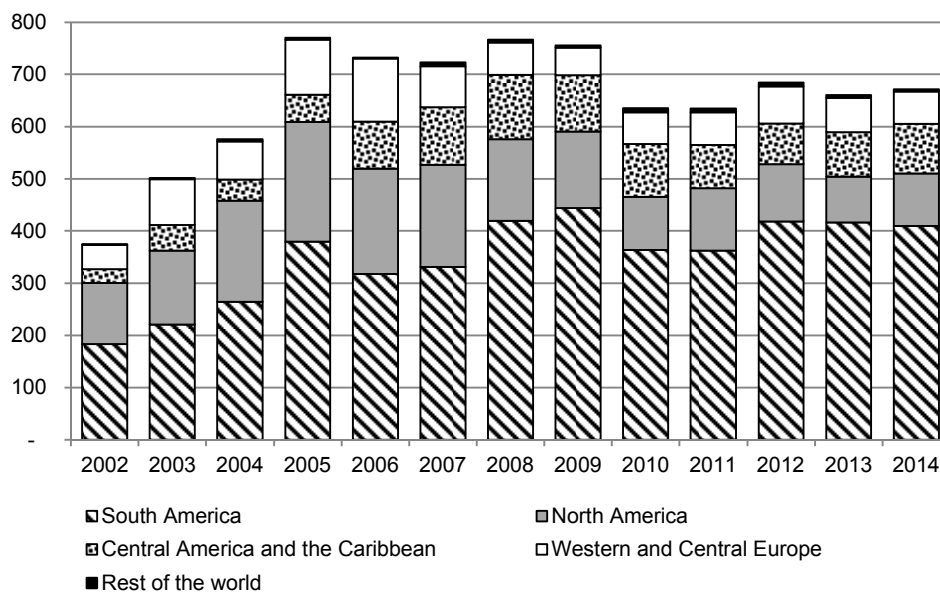
global cocaine seizures, and seizures in the region (410 tons) remained at essentially the same level as in 2012 and 2013.

53. In 2014, Colombia continued to be the country with 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 slightly for the second consecutive year, from 243 tons in 2012 to 226 in 2013 and 209 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.³²

54. 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 aircraft 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.

Figure IX

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



^a Data for 2014 are preliminary and incomplete.

³² *World Drug Report 2015*.

55. After significantly decreasing in 2013, cocaine seizures in Peru and Venezuela (Bolivarian Republic of) increased in 2014, without reaching the high levels of 2012. Peru reported a total of 29.8 tons of cocaine seized in 2014, up from 24.2 tons in 2013. Cocaine seizures in the Bolivarian Republic of Venezuela increased by 27 per cent to 26 tons, with 70 per cent occurring in the western area of the country, close to the border with Colombia. Venezuelan authorities reported a decrease in the use of airspace by unauthorized aircraft for trafficking cocaine, thanks to the strengthening of the legal framework and the introduction of new legislative measures.³³ In the Plurinational State of Bolivia, cocaine seizures increased slightly from 22 tons in 2013 to 22.3 tons in 2014, the lowest levels recorded since 2007. The authorities reported the use of large trucks and small aircraft by traffickers to transport cocaine into Argentina, Brazil and Paraguay.³⁴

56. In North America, after decreasing in 2013 to 87 tons, cocaine seizures increased by approximately 15 per cent compared with 2013, reaching 100 tons, but 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 reported³⁵ 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 containerized cargo or by couriers on commercial flights. Cocaine seizures in Canada more than doubled in 2014 compared with 2013, reaching 2.3 tons, while the amount of cocaine seized in Mexico decreased sharply, from more than 6 tons in 2013 to 2.8 tons in 2014, the lowest amount reported by the country since 1985. In their response to part IV of the annual report questionnaire for 2014, the Canadian authorities reported that cocaine entered the country mostly from Caribbean countries, including the Dominican Republic, Jamaica and Trinidad and Tobago.

57. In 2014, nine European countries³⁶ 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 over 25 tons each. Costa Rica reported that the country had changed in recent years from a transit country in the main to a country of transit and temporary storage. Preliminary data suggest that cocaine seizures in Latin America and the Caribbean increased in 2014 compared with 2013, owing partly to a sharp increase in Honduras, where seizures reached more than 12 tons (compared with 1.7 tons in 2013). In the Dominican Republic, cocaine seizures remained stable in 2014 compared with 2013, totalling 8.5 tons.

³³ Response by the Bolivarian Republic of Venezuela to part IV of the annual report questionnaire for 2014 and country report submitted to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean.

³⁴ Country report submitted by the Plurinational State of Bolivia to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean.

³⁵ United States Department of Justice, Drug Enforcement Agency, *2014 National Drug Threat Assessment*.

³⁶ Belgium, Germany, Greece, Italy, Netherlands, Portugal, Spain, Sweden and Switzerland.

58. A secondary route for cocaine trafficked across the Atlantic to Europe involved the use of countries in Africa, notably West Africa, as transit points. 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. 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. In North Africa, Egypt reported the seizure in 2014 of a record 532 kg of cocaine, which entered the country by sea (in particular through the port of Nuweiba), mail and air.³⁷

59. Cocaine seizures in Western and Central Europe peaked at 121 tons in 2006 then declined to an average of 62 tons between 2008 and 2013. In 2014, cocaine seizures in the region reached 62 tons. Belgium, France and Portugal reported increases from 6.5, 5.6 and 2.4 tons in 2013 to 9.3, 6.9 and 3.7 tons in 2014, respectively. As a major point of entry for cocaine from the Andean region into Europe, mostly by sea, Spain continued to be the European country with the highest amount of cocaine seized in 2014, with 21.7 tons, down from 26.7 tons in 2013. The Netherlands and Italy also reported decreases, from 12.4 and 5 tons of cocaine seized in 2013 to 8.8 and 3.9 tons in 2014, respectively.

60. In most parts of Eastern Europe, South-Eastern Europe, Asia and Oceania the availability of cocaine remains limited compared with the availability of other types of illicit drugs. However, seizure data show that cocaine traffickers continue to target specific parts of those regions. In 2014, Australia (756 kg), Hong Kong, China (285 kg), Jordan (319 kg), Montenegro (228 kg) and Turkey (393 kg) reported significant annual cocaine seizures.

D. Amphetamine-type stimulants

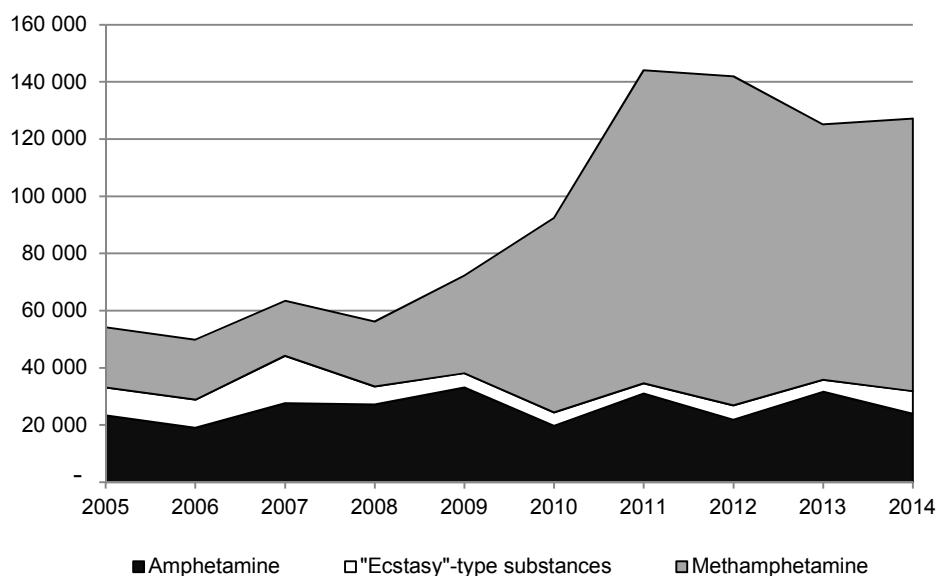
61. Amphetamine-type stimulants can be broadly classified as amphetamines (which include amphetamine and methamphetamine) and “ecstasy”-type substances.³⁸ Unlike the collection of seizure data for plant-based drugs, the collection of high-quality seizure data relating to amphetamine-type stimulants relies heavily on the proper identification and classification of seized controlled substances.

62. 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 significantly in 2013 to 125 tons, thanks to the first global decrease in methamphetamine seizures since 2007. In 2014, preliminary data indicate that global seizures of amphetamine-type stimulants have increased.

³⁷ Country report submitted by Egypt to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Africa.

³⁸ Including 3,4-methylenedioxymethamphetamine (MDMA).

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



^a Data for 2014 are preliminary and incomplete.

Methamphetamine

63. 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.³⁹

64. 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. Table 2 shows the amounts of methamphetamine seized in selected countries within the region in 2013 and 2014. 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.⁴⁰

³⁹ UNODC, *Global SMART Update, vol. 12* (September 2014).

⁴⁰ 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).

Table 2
**Seizures of methamphetamine in selected countries within the Asia-Pacific region,
 2013-2014**
 (Kilograms)

<i>Country</i>	<i>2013</i>	<i>2014</i>	<i>Trend</i>
Australia	4 619	7 111	Increase (+54%)
China	19 518	26 992	Increase (+38%)
Hong Kong, China	83	1 027	Increase (>100%)
Indonesia	543	1 125	Increase (>100%)
Japan	846	570	Decrease (-33%)
Lao People's Democratic Republic	1 384	Not applicable	Not applicable
Malaysia	1 754	1 292	Decrease (-26%)
Myanmar	1 090	Not applicable	Not applicable
Philippines	838	718	Decrease (-14%)
Thailand	11 855	Not applicable	Not applicable

65. 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. The Chinese authorities reported that almost 10 tons of methamphetamine tablets that had entered the country through the northern Myanmar border were seized in 2014 in Yunnan province alone, while most of the crystal methamphetamine seized was domestically produced.⁴¹ 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 Hong Kong, China; Mexico; Thailand; and West Africa.⁴²

66. In North America, methamphetamine seizures increased sharply in 2014. The United States reported the highest level of methamphetamine seized since 2002 — 31.2 tons, up from 22.9 tons in 2013. In their response to part IV of the annual report questionnaire for 2014, the authorities reported that most of the methamphetamine available in the United States was clandestinely produced in Mexico and smuggled across the south-west border. 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.⁴³

67. After peaking in 2011 with 3.9 tons and remaining stable in 2012 and 2013, methamphetamine seizures in the Islamic Republic of Iran decreased to 2.6 tons in 2014. However, that figure is significantly higher than levels prior to 2011, when

⁴¹ Country report submitted by China to the Thirty-ninth Meeting of Heads of National Drug Law Enforcement Agencies, Asia and the Pacific.

⁴² Country report submitted by Japan to the Thirty-ninth Meeting of Heads of National Drug Law Enforcement Agencies, Asia and the Pacific.

⁴³ Country report submitted by Mexico to the Twenty-fifth Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean.

annual methamphetamine seizures amounted to less than 1.5 tons. Guatemala also reported significant seizures of methamphetamine in 2014: 1,359 kg.

Amphetamine

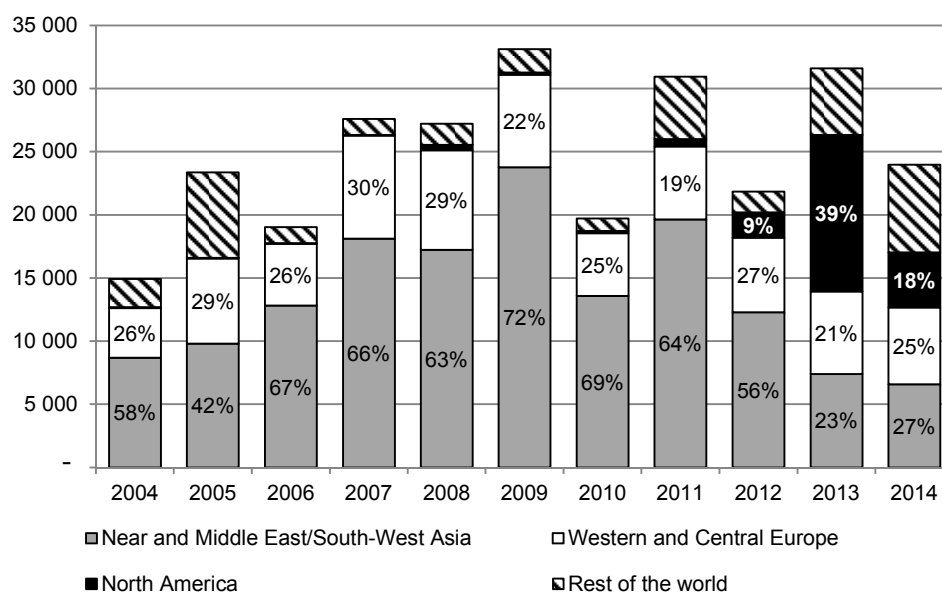
68. Between 2003 and 2012, Saudi Arabia reported the largest seizures of amphetamine in the world, accounting for between 30 and 50 per cent of global seizures over the period. Amphetamine seizures were concentrated in the Near and Middle East and, to a lesser extent, Western and Central Europe, where some countries, including the United Kingdom, the Netherlands and Germany, often reported the seizure of more than 1 ton of amphetamine annually.

69. In 2013, amphetamine seizures in Saudi Arabia decreased significantly, to 528 kg from more than 8 tons in 2012, while seizures in the United States increased sharply from less than 2 tons to 12.4 tons, making it the country with the highest amount of amphetamine seized worldwide in 2013. As a consequence, the geographical distribution of amphetamine seizures became more homogeneous. This trend continued in 2014, with 4.3 tons of amphetamine seized in the United States and 650 kg in Saudi Arabia (see figure XI). Countries in other parts of the world have also reported significant amounts of amphetamine seized in recent years. In South-East Asia, Myanmar and Thailand accounted for a total of more than 2 tons in 2013 and almost 4 tons in 2014. Côte d'Ivoire reported 1.2 tons of amphetamine seized in 2013 and the Guatemalan authorities reported seizing more than 1.5 tons in 2014.

Figure XI

Global seizures of amphetamine, by region (2004-2014)

(Kilograms)



“Ecstasy”-type substances

70. In 2014, global seizures of “ecstasy”-type substances increased significantly, from 4.2 tons in 2013 to 7.9 tons, according to preliminary 2014 data. That 87 per cent increase was due mainly 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. Other countries that reported significant seizures of “ecstasy”-type substances in 2014 were Turkey (976 kg, down from 1.2 tons in 2013), the United States (555 kg, compared with 865 kg in 2013), France (255 kg, compared with 112 kg in 2013) and Brazil (238 kg, compared with 50 kg in 2013).

71. Multi-ton 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.⁴⁴ 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.

IV. Conclusions

72. The cultivation of cannabis continues in most countries worldwide and in all regions of the world, while the production of cannabis resin remains confined to a few countries. Globally, cannabis herb seizures remained stable in 2013 and decreased in 2014, while preliminary data suggest that cannabis resin seizures remained stable in 2014.

73. 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, opium poppy cultivation is concentrated mostly in Myanmar, where the area under cultivation remained stable in 2014 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. Heroin seizures in South-Eastern Europe remained stable in 2013 and 2014, while in Western and Central Europe, seizures increased significantly in 2014 after following a downward trend during the previous 10 years. Heroin seizures in North America decreased slightly in 2014, after increasing for six consecutive years, while in South-West Asia heroin seizures decreased significantly. East and South-East Asia continue to be supplied by heroin originating mostly from Myanmar and the Lao People’s Democratic Republic, while East African countries have increasingly been used as transit countries for heroin being trafficked through the “southern route”.

74. 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. South America continued to account for the majority of global cocaine seizures; the amount seized in the region remained stable for the second consecutive year, while global cocaine seizures also remained stable.

⁴⁴ *The Challenge of Synthetic Drugs in East and South-East Asia and Oceania: Trends and Patterns of Amphetamine-type Stimulants and New Psychoactive Substances.*

African countries, in particular those in West Africa, remain transit points for cocaine trafficked to the consumer markets of Europe.

75. After decreasing in 2013 for the first time since 2008, preliminary data suggest that global seizures of amphetamine-type stimulants increased in 2014. 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. While in recent years increases in amphetamine seizures in North America have offset decreases in the Near and Middle East, there has been an increasing share of the Asia-Pacific region among global seizures of “ecstasy”-type substances.
