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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 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 up to 2012 and statistics on illicit cultivation of drug crops up to 2013 where available.

Afghanistan continues to account for most of the illicit cultivation of opium poppy in the world and opium poppy cultivation in the country reached a record level in 2013. The total area under coca bush cultivation decreased in 2012; however, global cocaine seizures remained stable. Global seizures of methamphetamine continued to rise in 2012 and in recent years the global market for methamphetamine has expanded significantly. Cannabis continued to be the most widely produced, trafficked and used plant-based illicit drug worldwide. Global seizures of cannabis herb decreased owing to a reduction in the quantity reported as having been seized in North America. In 2012, global seizures of cannabis resin were stable, but with a shift in seizure trends which showed a greater proportion of global seizures occurring in North Africa.

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\* E/CN.7/2014/1.



## **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 is based on the latest information available to the United Nations Office on Drugs and Crime (UNODC).
2. Section II of the report addresses the illicit production of cannabis, opiates and cocaine for the years up to and including 2012 and, where statistics are available, for 2013. With regard to drug trafficking, section III of the report focuses on seizure statistics for 2011 and 2012 and provides an update on trafficking trends for opiates, cannabis, cocaine and amphetamine-type stimulants based on the latest information available to UNODC.
3. Information on illicit cultivation of drug crops and production of plant-based drugs was drawn from the results of the latest UNODC illicit crop monitoring surveys and the *World Drug Report 2013*. The primary sources of information on drug trafficking were the replies submitted by Governments to part IV (Extent and patterns of and trends in drug crop cultivation and drug manufacture and trafficking) of the annual reports questionnaire for 2012.
4. As at 22 November 2013, UNODC had received replies to part IV of the annual reports questionnaire for 2012 from 79 Member States. Supplementary sources of information used in the preparation of the report include published official government reports and other reports received by UNODC or submitted to the Commission on Narcotic Drugs and its subsidiary bodies.
5. In general, statistics on drug seizures offer valid indirect indicators of drug trafficking trends. However, they should be treated with caution, as they also reflect different reporting practices and are dependent on the level and effectiveness of law enforcement capacities. In the present report, the term “tons” refers to metric tons (1,000 kg or 2,204.6 lb).

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

### **A. Cannabis**

6. Unlike other illicit crops such as coca leaf and opium poppy, the cannabis plant lends itself to diverse cultivation methods, as it is easily grown in a variety of environments. This makes assessing the extent of its cultivation and production difficult. Reports of cannabis cultivation show that a wide range of practices exist around the world. Cultivation occurs both indoors and outdoors, with Member States reporting growers cultivating cannabis for personal consumption, farmers cultivating cannabis to supplement their income and large-scale, commercial operations. Several countries referred to cultivation of cannabis plant occurring on a large scale in rural areas. Once harvested, the cannabis is transported to urban areas, or smuggled to neighbouring countries, to meet demand. Indirect indicators, such as seizures of cannabis plant, suggest that illicit cultivation of cannabis plant and production of cannabis herb occurred in most countries worldwide.

7. In contrast to cannabis herb, production of cannabis resin tended to be concentrated in fewer countries, the most prominent being Afghanistan and Morocco. The 2012 survey of commercial cannabis cultivation and production in Afghanistan estimated the total area under cultivation in 2012 at 10,000 hectares (ha), a decline of 17 per cent compared with 2011. The decrease in cultivation was mainly due to lower levels of cannabis plant cultivation in Uruzgan Province, where the area under cultivation of cannabis plant decreased dramatically from more than 1,000 ha in 2011 to less than 100 ha in 2012. It was reported that insurgent groups were using cannabis fields as hiding places and a strictly enforced ban imposed by provincial authorities had led to the reduction in cultivation. In the remaining 15 provinces surveyed, there were no major changes in cannabis plant cultivation in 2012. Due to higher per-hectare yields, the estimated potential production of cannabis resin in 2012 increased by 8 per cent, to 1,400 tons.

8. In its response to the 2012 annual reports questionnaire, Morocco estimated the net area under illicit cannabis plant cultivation (after eradication) at 47,000 ha, down slightly from the 47,500 ha reported in 2011. The authorities in Morocco reported<sup>1</sup> that efforts to reduce the illicit cultivation of cannabis plant had continued and had resulted in a 65 per cent reduction in the surface area of cannabis farms in comparison with 2003. The authorities had eradicated 5,000 ha of cannabis in 2012 (down from 8,000 ha in 2011) and assessed that the total annual production of cannabis resin remained stable at 760 tons.

## B. Opium

9. Afghanistan and Myanmar continued to account for the majority of illicit cultivation of opium poppy in the world, with 87 per cent of global illicit opium poppy cultivation occurring in those two countries.<sup>2</sup> The total area under opium poppy cultivation worldwide increased by 15 per cent in 2012 to reach 236,320 ha, and is likely to have increased further in 2013 due to a 36 per cent rise in cultivation in Afghanistan (see figure I).

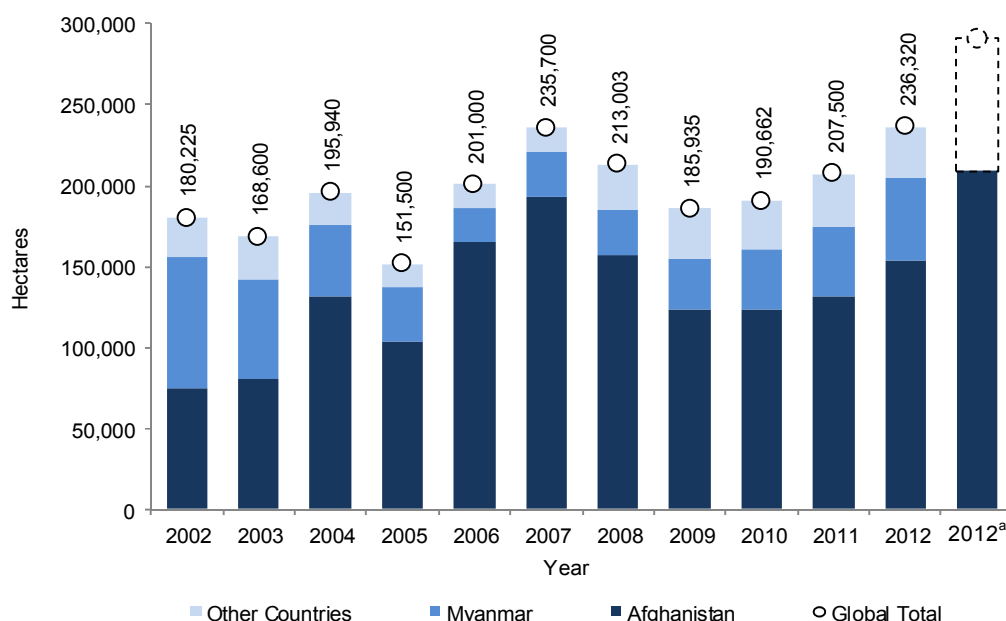
10. Afghanistan remains the main country where opium poppy is illicitly cultivated. According to the summary findings of the latest Afghanistan opium survey, opium poppy cultivation reached a record high in 2013, amounting to 209,000 ha and outstripping the earlier record in 2007 of 193,000 ha. The increase in cultivation was generally confined to the main opium poppy growing areas in the southern and western regions of the country. Two provinces that had previously been declared free of illicit opium poppy cultivation lost that status in 2013. Illicit opium production in 2013 increased by 49 per cent from 2012 and amounted to 5,500 tons.

<sup>1</sup> Country report submitted by Morocco to the Twenty-third Meeting of Heads of National Drug Law Enforcement Agencies, Africa, Addis Ababa, 16-20 September 2013, and the response to the annual reports questionnaire for 2012 from Morocco.

<sup>2</sup> Based on figures from the *World Drug Report 2013*, annex II.

Figure I

**Illicit opium poppy cultivation, worldwide and in selected countries, 2002-2013**  
(Hectares)



<sup>a</sup> At the time of preparation of the present report, cultivation figures were available only for Afghanistan for 2013. The chart shows indicative global cultivation based on cultivation in the previous year.

11. The high price of opium in 2012 was one of the principal factors behind the increase in opium poppy cultivation in 2013. The increase in cultivation may also be attributable to speculation, as farmers tried to hedge against the uncertain political future of Afghanistan as a result of the planned withdrawal of international troops and the elections to be held in 2014.

12. The link between insecurity and illicit cultivation of opium poppy continued to exist in 2013. The majority (89 per cent) of such cultivation took place in nine provinces in the southern and western regions of Afghanistan, which are dominated by a state of insurgency and organized criminal networks.<sup>3</sup> Cultivation increased by 34 per cent in Helmand Province, the principal opium poppy cultivating province in Afghanistan since 2004.

13. In South-East Asia, illicit opium poppy cultivation has historically taken place in the Lao People's Democratic Republic, Myanmar, Thailand and Viet Nam. Cultivation in those countries tends to be on steep hills with poor soil and no irrigation facilities, resulting in lower yields than in Afghanistan. In Myanmar, opium poppy cultivation declined markedly over the decade preceding 2006 but followed a generally increasing trend after that year, reaching 51,000 ha in 2012. While still small in comparison with the peak level of 1996, the 51,000 ha under

<sup>3</sup> UNODC and Ministry of Counter Narcotics of Afghanistan, "Afghanistan Opium Survey 2013: Summary findings", November 2013.

opium poppy cultivation in Myanmar in 2012 is significantly higher than the 21,500 ha recorded in 2006. The estimated opium production in Myanmar rose from 610 tons in 2011 to 690 tons in 2012, making Myanmar the largest cultivator of opium poppy and largest producer of illicit opium in the region.<sup>4</sup>

14. In the Lao People's Democratic Republic, the area under opium poppy cultivation increased from 4,100 ha in 2011 to an estimated 6,800 ha in 2012. That level is still small in comparison with the level registered in the period 1996-1999 but represented the fifth year-on-year increase and amounted to over four times the level observed in 2007 (1,500 ha). An aerial survey conducted by UNODC in 2012 revealed the existence of opium poppy cultivation in four of the six provinces in northern Lao People's Democratic Republic. The estimated production of opium in the country increased from 25 tons in 2011 to 41 tons in 2012. In comparison, cultivation in Thailand and Viet Nam occurred on a much smaller scale. Authorities in Thailand reported eradicating 208 ha of opium poppy during 2011 and Viet Nam eradicated 34 ha of opium poppy in 2012.

15. Illicit opium poppy cultivation also took place in Mexico, where authorities eradicated 16,389 ha of opium poppy in 2011 and 15,726 ha in 2012. Estimates of the net area under opium poppy cultivation were not available; however, Mexico estimated production of opium had decreased from 188 tons in 2011 to 175 tons in 2012. Cultivation also took place in Colombia, where interdiction actions carried out by security forces during 2012 included the manual eradication of 129 ha of opium poppy.<sup>5</sup>

16. According to authorities in India,<sup>6</sup> some illicit cultivation of opium poppy occurs in the remote mountainous regions in northern, eastern and north-eastern parts of the country. India used satellite imagery, ground verification and the collection of intelligence to identify areas under opium poppy cultivation and eradicated 5,814 ha of opium poppy in 2011 and a further 1,254 ha<sup>7</sup> in 2012. In its response to the 2011 annual reports questionnaire, Pakistan reported the eradication of 1,053 ha of opium poppy and that the total area under cultivation had been reduced to 362 ha after eradication.

## C. Coca

17. Bolivia (Plurinational State of), Colombia and Peru continued to account for virtually all cultivation of coca bush in the world. The total area under cultivation decreased in 2012 as a result of decreases in all three States (see figure II). The illicit extraction of cocaine alkaloids from coca leaves, a first step in the manufacture of cocaine, is believed to take place exclusively in those

<sup>4</sup> UNODC, Central Committee for Drug Abuse Control of Myanmar and Lao National Commission for Drug Control and Supervision, "South-East Asia opium survey 2012".

<sup>5</sup> Country report submitted by Colombia to the Twenty-third Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean, Quito, 30 September-4 October 2013.

<sup>6</sup> Country report submitted by India to the forty-seventh session of the Subcommission on Illicit Drug Traffic and Related Matters in the Near and Middle East, Antalya, Turkey, 19-23 November 2012.

<sup>7</sup> India, Narcotics Control Bureau, annual report 2012.

three countries, which also accounted for the majority of cocaine hydrochloride manufactured worldwide.

18. The 2012 coca bush cultivation survey jointly conducted by the Government of Colombia and UNODC shows that coca bush cultivation affected 23 of the 32 departments in Colombia. The area under coca bush cultivation in Colombia decreased by 25 per cent in 2012 to 48,000 ha, down from 64,000 ha in 2011. In 2012, Colombia manually eradicated 34,486 ha of coca bush and sprayed over 100,000 ha of crops from the air. The area under coca bush cultivation in Colombia in 2012 is well below the level recorded in 2000, when cultivation peaked, and is similar to levels last observed in the early 1990s. Production of cocaine in Colombia during 2012 was estimated to be 309 tons.

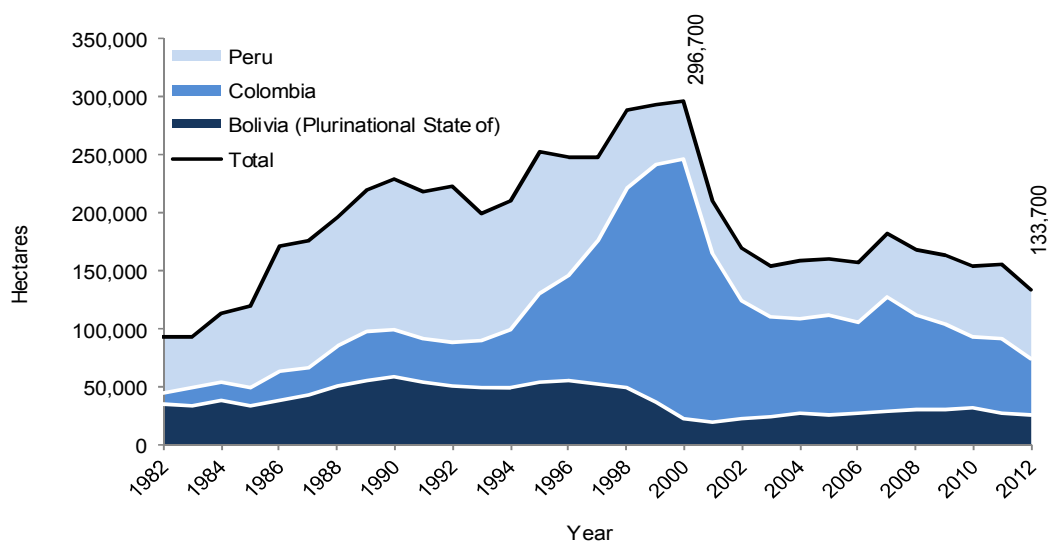
19. Around half of all coca bush fields in Colombia are in the three departments of Nariño, Putumayo and Norte de Santander. Nariño remained the department most affected by coca bush cultivation, with 10,733 ha under cultivation in 2012, accounting for 22 per cent of the total area under coca bush cultivation in Colombia. The area under coca bush cultivation remained stable or decreased in 20 of the 32 departments, while only three departments, Norte de Santander, Caquetá and Chocó, showed an increase. Nine departments recorded no coca bush cultivation.

20. According to the 2012 national coca bush monitoring survey in Peru, the net area of coca bush cultivation decreased by 3.4 per cent from 62,500 ha in 2011 to 60,400 ha in 2012. Between 2005 and 2011, the area of coca bush cultivation in Peru increased each year, so while the 2012 decrease is small in percentage terms, it represents a significant shift in the overall trend. The decrease was attributed to the national anti-drug strategy launched in 2012, coupled with programmes to provide farmers with alternative livelihoods. Such programmes have been especially effective in the Alto Huallaga area, which is among the biggest coca crop producers in the country. The Government of Peru eradicated over 14,230 ha of coca bush in the areas of Alto Huallaga and Aguaytia in 2012.

21. Satellite images and field surveys showed that some 13 regions in Peru were involved in growing coca bush, with Cusco, Ayacucho and Huánuco recording the largest areas under cultivation, followed by the Palcazu-Pichis-Pachitea area, which saw a 25 per cent increase. The total coca leaf output reached 129,000 tons in 2012, down nearly 2 per cent compared with 131,000 tons of sun-dried coca leaf produced in 2011.

22. The cultivation of coca bush decreased by around 7 per cent in the Plurinational State of Bolivia, according to the 2012 national coca crop monitoring survey. The area under cultivation decreased to 25,300 ha, from 27,200 ha in 2011. The 7 per cent decrease in 2012 is the second consecutive decrease, following on from a 12 per cent decrease in 2011. Efforts by the Government of the Plurinational State of Bolivia to contain illicit cultivation continued, with the eradication of 11,000 ha of coca bush in 2012, up 5 per cent from the 10,500 ha eradicated in 2011. In addition to eradication efforts, dialogue with farmers and alternative development initiatives contributed to the decrease in cultivation.

Figure II  
Coca cultivation, selected countries, 1982-2012  
(Hectares)



23. Satellite images and ground surveys recorded declines in the three largest coca bush producing regions of the Plurinational State of Bolivia. The Yungas region of La Paz accounts for just over two thirds of the coca bush cultivation in the Plurinational State of Bolivia and experienced a 7 per cent decrease in coca bush cultivation, down to 16,900 ha. The Cochabamba tropics area, which accounts for nearly a third of coca bush cultivation, registered a 6 per cent reduction to 8,100 ha. The northern provinces of La Paz account for a 1 per cent share of cultivation and recorded a 14 per cent drop to 320 ha.

### III. Trends in drug trafficking

24. The table below shows the quantities of the major drug types seized globally in 2011 and the estimated trend in 2012. UNODC estimated the trend based on data from those Member States which responded to both the 2011 and 2012 annual reports questionnaire and from other official sources. The table does not show the total amounts seized in 2012 for each drug type, as some Member States had not yet provided a response to the questionnaire at the time of preparation of the present report.

### Global drug seizures, 2011 and 2012

<i>Drug type</i>	<i>2011 seizures (kilograms)</i>	<i>Estimated trend in global seizures 2012<sup>a</sup></i>
<b>Cannabis</b>		
Cannabis herb	5,762,920	Decrease
Cannabis resin	1,051,059	Stable <sup>b</sup>
<b>Opiates</b>		
Opium	491,372	Stable <sup>b</sup>
Heroin	75,997	Stable <sup>b</sup>
<b>Cocaine</b>		
Cocaine <sup>c</sup>	595,318	Stable <sup>b</sup>
<b>Amphetamine-type stimulants</b>		
Amphetamine	30,973	Decrease
Methamphetamine	87,996	Increase
"Ecstasy"-type substances	3,674	Increase

<sup>a</sup> Since data for 2012 were incomplete, the trend is estimated by comparing total seized quantities for countries and territories for which data is available for both 2011 and 2012. Totals for 2012 have not been shown as they would understate the total amount seized.

<sup>b</sup> The term "Stable" refers to a variation of less than 10 per cent.

<sup>c</sup> Includes coca paste/coca base, cocaine base, cocaine salts and "crack" cocaine.

## A. Cannabis

### Cannabis herb

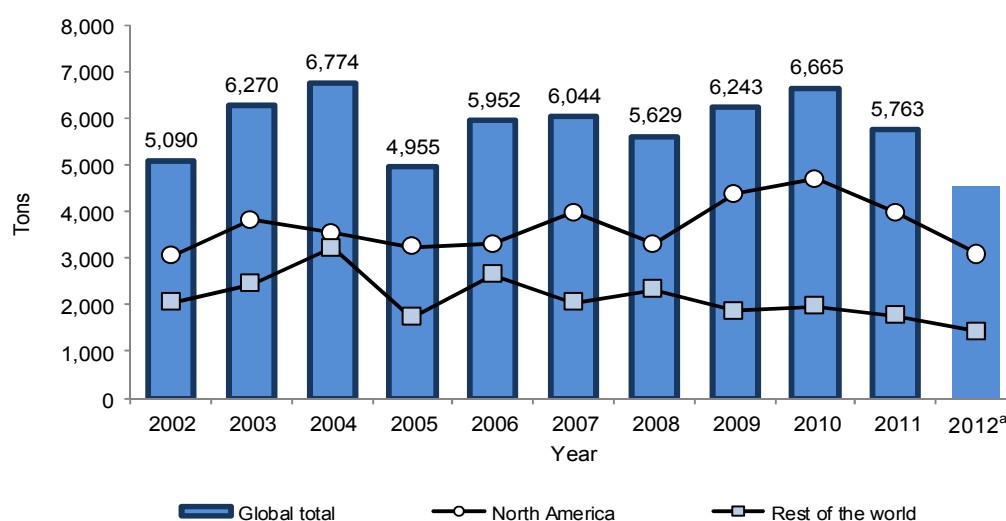
25. Data from the responses to the 2012 annual reports questionnaire suggest global seizures of cannabis herb decreased in 2012 (see figure III). The decrease is primarily due to lower reported annual seizures in North America. North America has, on average, accounted for 62 per cent of global cannabis herb seizures between 2002 and 2012. The reported decrease in cannabis seizures in North America had a significant impact on the level of global seizures.

26. The total weight of cannabis herb seizures in the United States of America decreased from 2,033 tons in 2011 to 1,772 tons in 2012. However, the number of seizure cases increased from 16,417 in 2011 to 18,968 in 2012. Authorities reported that cannabis herb availability appeared to be increasing owing to both sustained levels of production outside the United States and increased cannabis cultivation within the United States.

27. In Mexico, cannabis herb seizures decreased by 39 per cent from 1,799 tons in 2011 to 1,297 tons in 2012. Cannabis herb cultivation occurred in various parts of the country, concentrated in the northern states of Chihuahua, Durango and Sonora, where the plant is dried, packed and pressed for distribution. In 2012, authorities in Mexico estimated the final destination for 58 per cent of cannabis herb seized was Mexico while 32 per cent was destined for the United States. The primary method used to transport cannabis herb was by land using the road network, but it was also transported on a smaller scale by air and sea.



Figure III  
Global cannabis herb seizures, 2002-2012



<sup>a</sup> Based on available data for 2012.

28. In Africa, the relatively limited amount of data means that analysing trends in cannabis seizures at the regional and subregional levels is challenging.<sup>8</sup> However, several Member States in the region have provided information on a consistent basis over several years. Seizures of cannabis herb in Nigeria increased by 19 per cent in 2012, while seizures in Egypt and Morocco remained at similar levels to the previous year (up 5 per cent in Egypt and down 1 per cent in Morocco). Nigeria reported<sup>9</sup> that the illicit cultivation of cannabis plant continued to be a matter of great concern and that cannabis seizures accounted for over 90 per cent of illicit substances seized in the country. Between January 2012 and July 2013, authorities in Nigeria identified and seized or destroyed cannabis plant growing on over 1,778 ha of farmland.

29. Seizures of cannabis herb in Europe increased from 185 tons in 2011 to 220 tons in 2012. The increase was primarily due to seizures in Turkey, which reported a 59 per cent increase in cannabis seizures during 2012.<sup>10</sup> Seizures of cannabis herb in Turkey have increased each year since 2003 and authorities report that cannabis continued to be the most frequently seized and used drug. Cultivation occurred in rural parts of the south-east Anatolia region and cannabis was also trafficked into Turkey to meet demand in that country.

<sup>8</sup> At the time of writing the present report, responses to the annual reports questionnaire were available from five African countries; seizures data for another five African countries were obtained from country reports submitted to the Twenty-third Meeting of the Heads of National Drug Law Enforcement Agencies, Africa.

<sup>9</sup> Country report submitted by Nigeria, Twenty-third Meeting of Heads of National Drug Law Enforcement Agencies, Africa, Addis Ababa, 16-20 September 2013.

<sup>10</sup> Country report submitted by Turkey, Tenth Meeting of Heads of National Drug Law Enforcement Agencies, Europe, Vienna, 2-5 July 2013.

30. In Asia, seizures of cannabis herb remained stable in the subregions of South-West Asia, Central Asia and Transcaucasian countries, and East and South-East Asia. However, seizures in South Asia decreased owing to a decline in seizures in India. India reported that on average seizures of cannabis herb were around 100 tons every year and that during 2012 seizures declined by around 60 per cent in comparison with the previous year. While the amount of cannabis herb seized in India decreased, the number of seizure cases increased.<sup>7</sup>

31. Cannabis herb continued to be the most seized illicit drug in Oceania. In 2012, cannabis herb seizures in New Zealand increased by 21 per cent to reach 693 kg. Authorities in New Zealand reported cannabis was the most widely used illicit drug, with a high frequency of cannabis experimentation and use within the general population. Seizures in Australia increased by 3 per cent to reach 2,339 kg. Australian authorities reported that cannabis was the dominant illicit drug in terms of arrest, seizures and use. Cultivation within Australia generally made trafficking cannabis to Australia unnecessary or unprofitable for organized criminal groups.

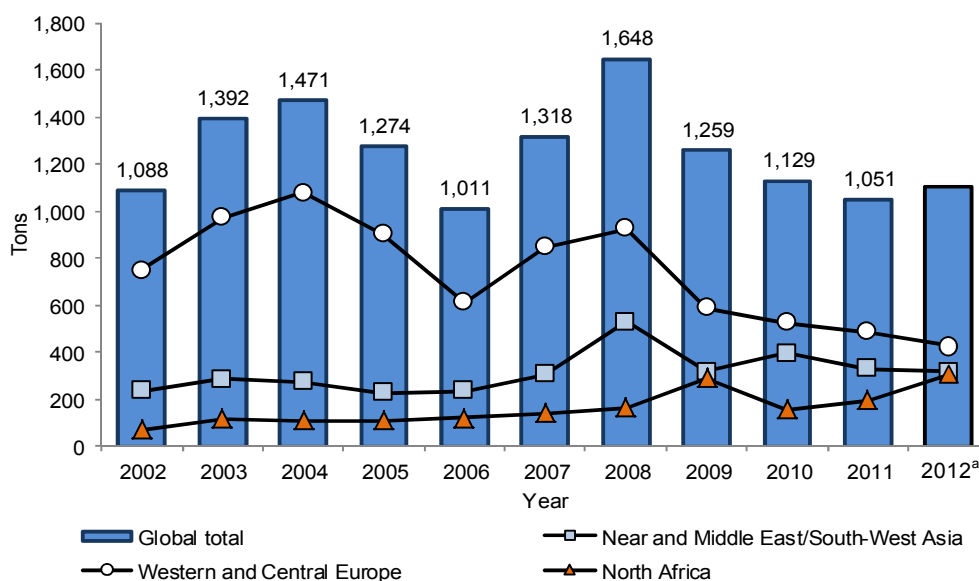
### **Cannabis resin**

32. In contrast with cannabis herb, the production of cannabis resin is concentrated in a smaller number of countries, the most prominent of which are Afghanistan and Morocco. In the responses to the 2012 annual reports questionnaire, those two countries were also the most frequently listed as source countries for cannabis resin. A total of 11 European countries listed Morocco as the source of cannabis resin, while three European countries listed Afghanistan as a source country.

33. Seizures of cannabis resin were concentrated in North Africa, the Near and Middle East/South-West Asia and Western and Central Europe (primarily Spain). A total of 95 per cent of global cannabis resin seizures occurred in these three subregions. Figure IV illustrates that between 2002 and 2012, the proportion of global cannabis resin seizures in Western and Central Europe decreased, while the proportion of global cannabis resin seizures in North Africa and the Near and Middle East/South-West Asia increased.

34. In 2012, Spain seized more cannabis resin than any other country worldwide and continued to be a gateway through which cannabis resin from Morocco reached Europe. However, seizures in Spain fell for the fourth consecutive year to 326 tons (down from 356 tons in 2011). The quantity of cannabis resin seized in Spain during the past decade has followed a decreasing trend. Spain assessed that 91 per cent of seized cannabis resin had originated in Morocco.

Figure IV  
Global cannabis resin seizures, 2002-2012



<sup>a</sup> Based on available data for 2012.

35. In addition to Spain, three other countries in Western and Central Europe (France, Italy and the United Kingdom of Great Britain and Northern Ireland) reported seizing over 5 tons of cannabis resin in 2012. Seizures in Italy and the United Kingdom remained stable at just over 20 tons in 2012, while seizures in France decreased slightly from 55 tons in 2011 to 51 tons in 2012. French authorities reported<sup>11</sup> the most common means of transporting cannabis resin continued to be by road through Spain from Morocco and that the drug frequently departed from the Rif region of Morocco by sea on board motorized semi-rigid inflatable “go-fast” boats for the Spanish coast, or in trucks travelling via maritime trade routes between Morocco, Spain and France.

36. In Morocco, seizures of cannabis resin increased from 126 tons in 2011 to 137 tons in 2012. Moroccan authorities reported<sup>1</sup> that light aircraft were increasingly being used by drug trafficking groups and noted 38 cases involving light aircraft trafficking illicit drugs in 2012. Authorities advocated for strengthening subregional, regional and international cooperation and increasing the exchange of intelligence, experience and expertise to counter new and emerging drug trafficking trends.

37. In recent years, Morocco has accounted for the majority of cannabis resin seizures among countries in North Africa. In 2012, however, the largest annual cannabis seizures in the subregion occurred in Algeria, where seizures tripled from 53 tons in 2011 to 157 tons in 2012. The increase appears to have continued into 2013, with the seizure of a further 62 tons in the first five months of 2013. The

<sup>11</sup> Country report submitted by France, Twenty-third Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean, Quito, 30 September-4 October 2013.

significant increase in cannabis resin seizures was attributed to real-time exchange of intelligence among law enforcement agencies, tightened security and surveillance measures along the western borders of the country, the expansion and modernization of drug law enforcement agencies and training of personnel in techniques to combat drug trafficking.<sup>12</sup>

38. In the Near and Middle East/South-West Asia, the largest seizures of cannabis resin continued to be made by Afghanistan, Iran (Islamic Republic of) and Pakistan. Since 2001, seizures of cannabis resin in the Near and Middle East/South-West Asia have accounted for a growing share of global cannabis resin seizures.

39. Seizures of cannabis resin in South-Eastern Europe doubled from 21 tons in 2011 to 43 tons in 2012 and accounted for 4 per cent of global seizures. For the third consecutive year, Turkey seized over 20 tons of cannabis resin and seizures in that country increased from 21 tons in 2011 to 27 tons in 2012. In addition to the increase reported by Turkey, a large seizure by law enforcement authorities in Bulgaria contributed to the increase in seizures in South-Eastern Europe. Annual seizures in Bulgaria amounted to 16 tons in 2012 from just 3 cases, compared with just 16 kg from 10 cases the previous year. The authorities in Bulgaria reported a large seizure of cannabis resin, smuggled from Morocco to the Black Sea port of Burgas on a maritime vessel which also contained legal cargo from the United Kingdom. The seized cannabis resin was being temporarily stored in Bulgaria with the intention of further transportation by road to Western and Central Europe.<sup>13</sup> This itinerary highlights the complex routes organized criminal groups are using to avoid detection and underscores the importance of monitoring maritime containers for illicit drugs.

## **B. Opiates**

### **Opium**

40. Global seizures of opium grew at a marked pace over the period 2002-2008 and peaked in 2009 at 653 tons. However, global opium seizures declined to 492 tons in 2010 and remained stable at 491 tons in 2011. Provisional information for 2012 suggests global opium seizures remained stable in that year. Since 2004, three countries, Afghanistan, Iran (Islamic Republic of) and Pakistan, have consistently accounted for more than 90 per cent of global opium seizures (see figure V).

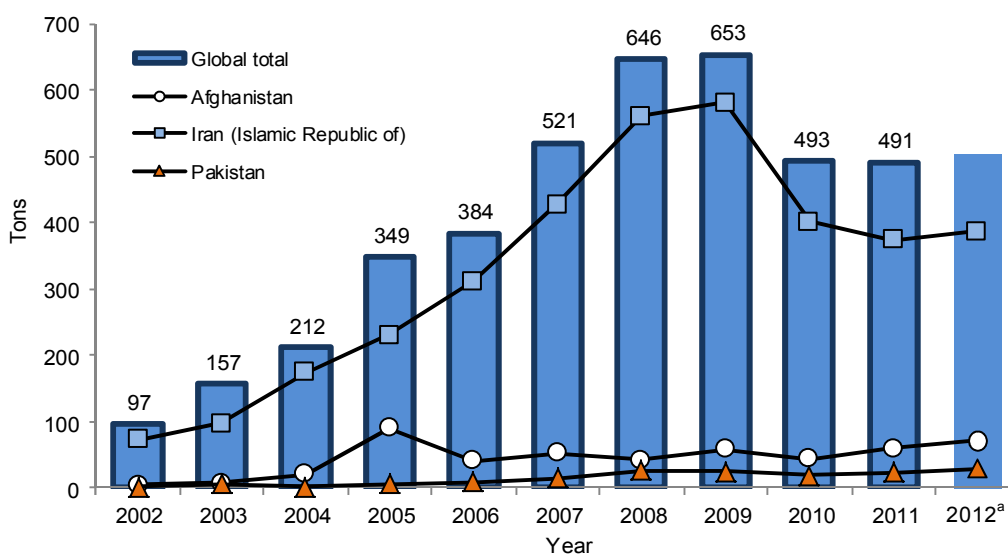
41. Based on the records of UNODC, the Islamic Republic of Iran has registered the highest annual total of opium seized by a single country worldwide every year since 1980. Over the period 2002-2009 in particular, seizures increased almost eightfold, climbing from 73 tons to 580 tons. In 2010, the increasing trend reversed, and opium seizures in the Islamic Republic of Iran have stabilized at around 400 tons per year. In 2012, the Islamic Republic of Iran seized 388 tons of opium, slightly higher than the 374 tons seized in 2011.

<sup>12</sup> Country report submitted by Algeria, Twenty-third Meeting of Heads of National Drug Law Enforcement Agencies, Africa, Addis Ababa, 16-20 September 2013.

<sup>13</sup> Response of Bulgaria to the annual reports questionnaire for 2012, part IV, question 10.

42. Opium seizures in Afghanistan increased between March 2011 and March 2013.<sup>14</sup> The amount of opium seized by the Criminal Justice Task Force<sup>15</sup> from suspects accused of narcotics-related crimes increased to 71.6 tons during the year from March 2012 to March 2013, up from 60.5 tons in the same period for 2011/2012 and 44.5 tons in 2010/2011. Despite the increase in seizures, the dry opium price in Afghanistan has followed a decreasing trend since peaking at \$276 per kilogram in February 2011. The average price for 1 kg of dry opium in Afghanistan at the farm-gate level was \$134 per kilogram at the end of September 2013, 35 per cent lower than the \$204 per kilogram recorded a year earlier, in September 2012.<sup>16</sup>

Figure V  
**Global opium seizures, 2002-2012**  
(Tons)



<sup>a</sup> Provisional global seizure figures shown for 2012.

43. Seizures of opium in Pakistan increased from 23 tons in 2011 to 29 tons in 2012. Seizures also increased in India, from 2.3 tons in 2011 to 3.6 tons in 2012. Authorities in India reported<sup>7</sup> that drug trafficking patterns and trends in 2012 included both illicit cultivation of opium poppy and suspected diversion of opium from licit cultivation within the country.

### Illicit morphine

44. As was the case with opium, seizures of morphine continued to be concentrated in Afghanistan and its neighbouring countries. Every year from 2005

<sup>14</sup> Afghanistan, Ministry of Counter Narcotics, drug report for 2012, November 2013.

<sup>15</sup> Seizures of opium over 10 kg go to the Criminal Justice Task Force in Kabul, while seizures below that threshold are tried at the provincial level.

<sup>16</sup> UNODC and Afghanistan, Ministry of Counter Narcotics, Afghanistan drug price monitoring monthly report, September 2013.

onwards, Afghanistan, Iran (Islamic Republic of) and Pakistan together accounted for more than 90 per cent of global morphine seizures. In the Islamic Republic of Iran, seizures decreased for the third consecutive year, amounting to 5.8 tons in 2012, a decrease of 15 per cent from the previous year. Illicit morphine seizures in Pakistan decreased for the second consecutive year, where authorities seized 1.4 tons of illicit morphine in 2012, down from 4.3 tons in 2011 and 6.1 tons in 2010. Seizures in Afghanistan, however, have increased in recent years. Illicit morphine seizures from suspects increased by 385 per cent between 2009 and 2012, indicating a growing presence of morphine in the country and possibly signalling a shift in manufacturing trends.<sup>14</sup>

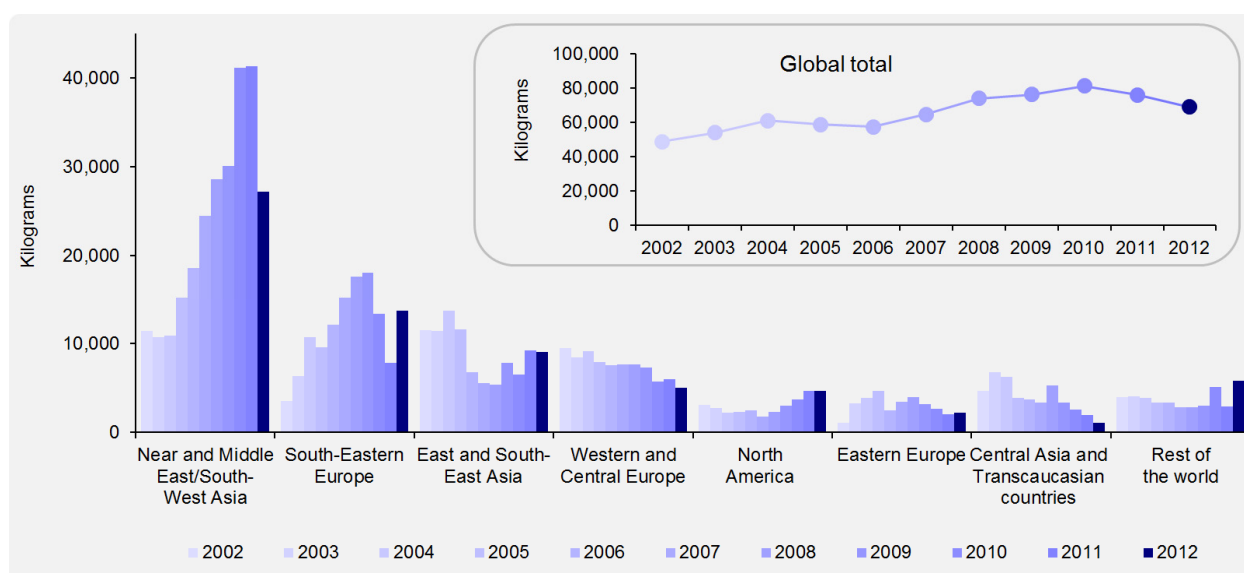
### Heroin

45. Global seizures of heroin increased significantly over the period 2006-2010, reaching 81 tons in 2010. This trend began to change in 2011 when seizures decreased by 6 per cent to 76 tons. In 2012, global heroin seizures decreased by 9 per cent to an estimated 69 tons. Figure VI shows heroin seizures globally and in selected subregions.

Figure VI

#### Global and subregional heroin seizures, 2002-2012

(Kilograms)



46. Part of the reason behind the decrease in global heroin seizures was a significant decrease in seizures reported by countries of the Near and Middle East/South-West Asia. Seizures by the Islamic Republic of Iran dropped significantly in 2012. That decrease, however, was somewhat offset by an increase in seizures in Pakistan. Seizures in the Islamic Republic of Iran decreased from 23 tons in 2011 to 10 tons in 2012,<sup>17</sup> while seizures in Pakistan increased from

<sup>17</sup> Islamic Republic of Iran, Drug Control Headquarters, "Drug control in the Islamic Republic of Iran 2012".

7.7 tons in 2011 to 12.7 tons in 2012. Pakistan reported<sup>18</sup> that the country was a major transit route for opiates and estimated that up to 40 per cent of the heroin produced in Afghanistan transited through Pakistan.

47. In 2012, a significant (76 per cent) increase in heroin seizures in South-Eastern Europe offset the decrease in heroin seizures in the Near and Middle East/South-West Asia. The increase was due to heroin seizures in Turkey, which rebounded to 13.3 tons in 2012 after dropping to 7.3 tons in 2011 (from 12.7 tons in 2010). Turkey reported a significant increase in heroin smuggling by sea.

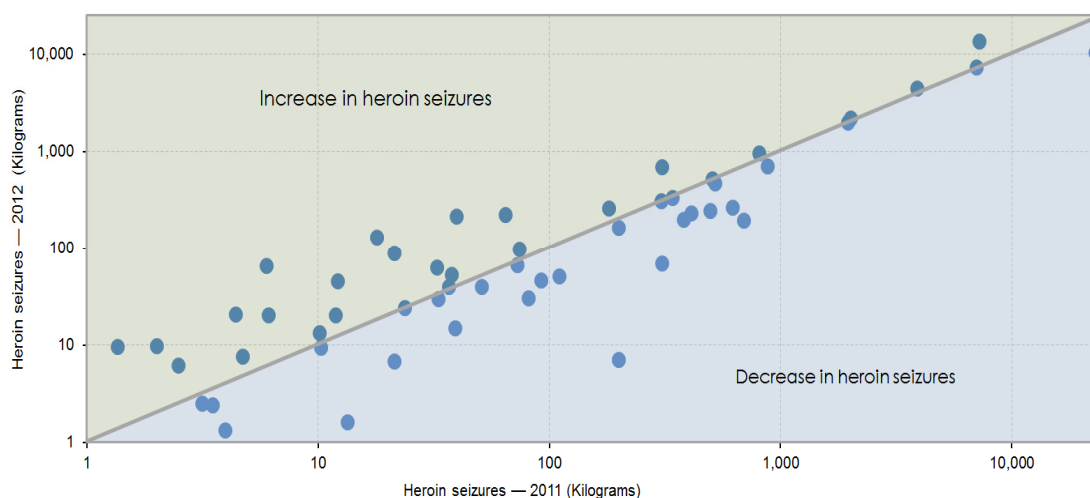
48. In South and South-East Asia, seizures of heroin amounted to 9.1 tons during 2012, compared with 9.2 tons in 2011. China continued to account for the majority of heroin seizures in the region, with annual seizures of 7.3 tons in 2012, up from 7.1 tons in 2011. Authorities from China reported<sup>19</sup> that northern Myanmar was still the main source of heroin in the Chinese market, but also noted the growing threat posed by opiates originating from Afghanistan.

49. Seizures of heroin in most other regions remained stable or followed established trends. In 2012, seizures continued to gradually fall in both Western and Central Europe and in Central Asia and Transcaucasian countries, while seizures in Eastern Europe and North America remained at a similar level to the previous year. Figure VII shows that for the majority of countries, heroin seizures in 2012 were similar in magnitude to the previous year.

Figure VII

#### Heroin seizures, 2011 and 2012

(Kilograms, log scales)



50. Heroin seizures in Africa increased to 674 kg in 2012, up from 621 kg in 2011. The amount of heroin seized by countries in East Africa was similar to those seized

<sup>18</sup> Country report submitted by Pakistan, Thirty-seventh Meeting of Heads of National Drug Law Enforcement Agencies, Asia and the Pacific, Bangkok, 21-24 October 2013.

<sup>19</sup> Country report submitted by China, Thirty-seventh Meeting of Heads of National Drug Law Enforcement Agencies, Asia and the Pacific, Bangkok, 21-24 October 2013.

in West and Central Africa. East African countries reported seizing 278 kg of heroin, while countries in West and Central Africa seized 284 kg of heroin. Seizures of heroin in North Africa amounted to 112 kg in 2012.

### C. Cocaine

51. The main consumer markets for cocaine in the world, namely North America and Western and Central Europe, continued to be supplied by cocaine originating in South America, notably the Andean region. Cocaine from the Andean region is trafficked northwards to North America and across the Atlantic to Europe via the Caribbean or Africa. Global cocaine seizures decreased in 2012, but were within 10 per cent of seizures made in the previous year.

52. In 2012, cocaine seizures occurred closer to the point of production when compared with seizures in 2011. Global cocaine seizures decreased slightly; however, seizures in South America went against the trend and increased (see figure VIII). Nine South American countries recorded an increase in cocaine seizures in 2012 and only one country reported a decrease.<sup>20</sup> Colombia continued to report the largest amount of cocaine seized by a single country. Seizures of cocaine base and cocaine salts in Colombia increased from 200 tons in 2011 to 243 tons in 2012. Authorities in Colombia reported<sup>5</sup> that maritime operations were the most successful and drew attention to an operation in the Pacific Ocean that had resulted in the seizure of 9 tons of cocaine.

53. In North America, seizures of cocaine decreased in Canada, Mexico and the United States (see figure VIII). Throughout 2012 there was a significant decrease in the amount of cocaine entering Canada over previous years. Air cargo, postal services and passenger luggage coming from the Caribbean and Central and South America into Canada comprised the majority of cocaine seizures, while three marine shipping containers accounted for the rest. Authorities in Mexico reported<sup>21</sup> that cocaine continued to be trafficked by sea. That form of trafficking accounted for the highest volume of drugs seized. Trafficking by land, however, continued to account for the greatest number of interdiction operations. In the United States, authorities reported a decrease in seizures at the south-west border. Price and purity data also indicated a decreased availability of cocaine in the United States during 2012.

54. Cocaine seizures in Western and Central Europe peaked at 121 tons in 2006 then declined for three years before stabilizing at between 53 and 63 tons. At the time of preparation of the present report, available data<sup>22</sup> suggested that seizures of cocaine in Western Europe decreased slightly in 2012. Cocaine seizures decreased in France, Germany and Italy, while seizures increased in Spain. Spain seized a total

<sup>20</sup> In 2012, increases in cocaine seizures were recorded in Argentina, Bolivia (Plurinational State of), Chile, Colombia, Ecuador, Paraguay, Peru, Uruguay and Venezuela (Bolivarian Republic of). Brazil reported a slight decrease in cocaine seizures; however seizures in Brazil remained above the levels recorded prior to 2008.

<sup>21</sup> Country report submitted by Mexico, Twenty-third Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean, Quito, 30 September-4 October 2013.

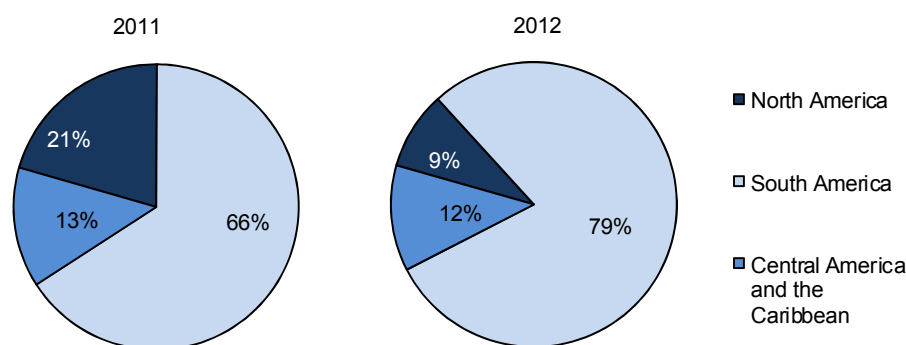
<sup>22</sup> Comparing countries with data in both 2011 and 2012 shows a 6 per cent decrease in cocaine seizures in Western and Central Europe. Three countries with traditionally large seizures had not yet responded to the annual reports questionnaire at the time of preparation of the present report.



of 21 tons in 2012, representing an increase of 25 per cent over 2011. Despite the increase in 2012, however, cocaine seizures over the past 10 years have shown a downward trend in Spain, with annual seizures well below the amounts seized in 2003, 2005 and 2006 when annual seizures reached almost 50 tons.

Figure VIII

**Cocaine seizures, the Americas, 2011 and 2012**



55. A secondary route for cocaine trafficked across the Atlantic to Europe involved the use of countries in Africa, notably West Africa, as transit countries. In 2012, the amount of cocaine seized in West African countries decreased compared with the previous year.<sup>23</sup> Seizures in Nigeria decreased from 411 kg in 2011 to 132 kg in 2012, while seizures in Benin also dropped, from 425 kg in 2011 to 70 kg in 2012. Authorities in Nigeria reported that there had been no changes in the methods of transportation or the origin, routes or final destination of trafficked cocaine. In 2012, 60 per cent of the cocaine that entered Nigeria arrived by sea, 30 per cent arrived by air, 5 per cent arrived by land and 5 per cent by postal services.

## D. Amphetamine-type stimulants

### Amphetamine

56. Global seizures of amphetamine decreased from 31 tons in 2011 to 24 tons in 2012, thus remaining at similar levels to those observed between 2005 and 2011 when seizures ranged from 19 tons to 33 tons (see figure IX). The countries reporting the largest seizures of amphetamines have remained relatively unchanged since 2005. For the tenth consecutive year, Saudi Arabia recorded the largest annual seizure of amphetamine by a single country. Saudi Arabia has been a major consumer market for Captagon tablets, with over 48 million tablets seized by authorities in 2012.

<sup>23</sup> Based on data from five West African countries.

## Methamphetamine

57. Between 2008 and 2012, the global market for methamphetamine expanded significantly. After relatively stable levels of seizures during the period 2001-2007 (ranging from 19 to 28 tons), the annual amount of methamphetamine seized globally increased to over 90 tons in 2012 (see figure IX). In 2012, seizures increased in both North America and East and South-East Asia.

58. The Government of Mexico has identified methamphetamine production both in the west of the country (in Colima, Guanajuato, Jalisco, Michoacán and Nayarit) and in the north-east (Sinaloa and Sonora).<sup>24</sup> Mexico seized a total of 31.55 tons of methamphetamine in 2012, 2 per cent more than the quantity seized in 2011 (30.86 tons). Authorities dismantled 270 illicit drug laboratories in 2012, 96 per cent of which were used for preparation of methamphetamine. Many of the laboratories also contained controlled chemical precursors.

59. Seizures of methamphetamine by the United States increased significantly, with seizures of crystallized methamphetamine reaching 20 tons in 2012 (up from 9.7 tons in 2011). Authorities reported that methamphetamine availability was probably increasing and noted that law enforcement and intelligence reporting, as well as price and purity data, indicated that methamphetamine prices continued to decline while purity levels had increased.

60. East and South-East Asia has some of the largest and most established markets for amphetamine-type stimulants in the world.<sup>24</sup> In 2012, methamphetamine seizures in East and South-East Asia continued at record high levels. Seizures increased in Brunei Darussalam, Cambodia, China, Indonesia, Japan, the Lao People's Democratic Republic, Singapore, Thailand and Viet Nam. Precursor chemicals used in illicit manufacture of methamphetamine are often easily obtainable and a large share of these, often in the form of pharmaceutical preparations, are produced in the region and in the neighbouring region of South Asia.<sup>25</sup>

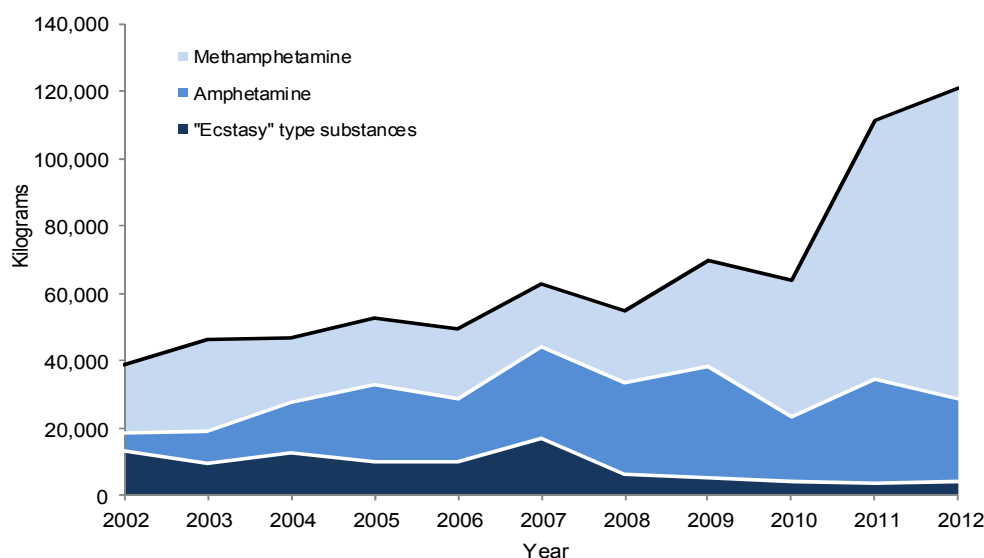
61. Seizures of methamphetamine in Europe decreased to 923 kg in 2012 from a peak of 1,582 kg in 2011. Despite the latest decrease, seizures in Europe remained significantly above the levels observed prior to 2011.

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<sup>24</sup> UNODC, "Global SMART Update", vol. 10, September 2013.

<sup>25</sup> UNODC, Global SMART Programme, *Patterns and Trends of Amphetamine-Type Stimulants and Other Drugs: Challenges for Asia and the Pacific*, 2013.

Figure IX  
Global seizures of amphetamine-type stimulants, 2002-2012



#### “Ecstasy”-type substances

62. Based on available data, global seizures of “ecstasy” increased from 3.7 tons in 2011 to over 4 tons in 2012 (see figure IX). Comparing the amount of “ecstasy”-type substances seized in the 54 countries with data in both 2010 and 2011 reveals a 36 per cent increase in 2012. Despite the increase in 2012, seizures of “ecstasy” remained well below the levels recorded between 2002 and 2007.

63. At the time of preparation of the present report, eight countries had reported to UNODC annual seizures of over 100 kg of “ecstasy”-type substances in 2011: Australia, China, Indonesia, Malaysia, Turkey, the United Kingdom, the United States and Viet Nam.

64. According to a recent report from the UNODC Global SMART Programme,<sup>25</sup> “ecstasy” seizures in East and South-East Asia have fluctuated over the years. In 2012, the number of “ecstasy” pills seized more than tripled, to over 5.4 million pills from about 1.6 million pills in 2011. This is the highest total reported since 2007, when 5.6 million “ecstasy” pills were seized. A large majority of “ecstasy” seizures continued to be made in Indonesia, where the number seized increased nearly fourfold from 1.1 million pills in 2011 to 4.3 million pills in 2012, accounting for 79 per cent of the total in the region.

## IV. Conclusions

65. Afghanistan continues to account for most of the illicit cultivation of opium poppy in the world. Opium poppy cultivation in the country reached a record level in 2013, amounting to 209,000 ha. The increase in cultivation was mainly confined

to the opium poppy-growing areas in the southern and western regions of the country. Opium production in Afghanistan increased by 49 per cent, to 5,500 tons.

66. In the three Andean States that account for virtually all cultivation of coca bush in the world, the total area of coca bush under cultivation decreased in 2012. Seizures of cocaine in South America increased, while seizures in North America decreased. Overall, the available data suggest that global cocaine seizures remained stable in 2012.

67. Cannabis continued to be the most widely illicitly produced, trafficked and used plant-based drug worldwide. Data available at the time of preparing the present report suggest that global seizures of cannabis herb decreased owing to a reduction in the quantity reported to have been seized in North America. In 2012, global seizures of cannabis resin were stable, but with a shift in seizure trends showing a greater proportion of global seizures occurring in North Africa.

68. Global seizures of methamphetamine continued to rise in 2012. In recent years, the global market for methamphetamine has expanded significantly. After relatively stable levels of seizures in the period 2001-2007, the annual amount of methamphetamine seized globally increased rapidly between 2008 and 2012. Seizures of methamphetamine worldwide exceeded 90 tons in 2012. Global seizures of “ecstasy” increased in 2012; however, they remain well below the levels recorded between 2002 and 2007.

69. Illicit drug characterization and forensic profiling remain invaluable in supporting law enforcement intelligence-gathering and operational work and in the international efforts against illicit drugs. In its resolution 56/5, entitled “Promoting the sharing of expertise in and knowledge on forensic drug profiling”, the Commission reinforced the importance of these activities and called on UNODC to promote the sharing of such expertise and knowledge. However, the lack of extrabudgetary resources required to develop standardized guidelines has precluded the implementation of that resolution during the period under review.

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