

2 July 2013

Arabic, English and French only*

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

16-20 September 2013

**Current situation with respect to regional and subregional
cooperation in countering drug trafficking****Statistical analysis of drug trafficking trends in Africa and
worldwide****Report of the Secretariat***Summary*

The present report provides an overview of the latest trends in illicit drug production and trafficking in Africa and worldwide. The statistics and analysis in the report are based on the latest information available to the United Nations Office on Drugs and Crime. In respect of seizures, the report focuses on the ten years up to and including 2011. The report also includes the latest information available on cultivation, production and manufacture of illicit drugs.

Cannabis continues to be the most widely cultivated, produced, trafficked and consumed illicit drug and cannabis cultivation continues to occur in most countries in Africa. Global cannabis herb seizures decreased in 2011 and seizures in Africa also decreased. Seizures in Africa decreased from 799 tons in 2010 to 522 tons in 2011. Global cannabis resin seizures decreased for the third consecutive year, however seizures in Africa increased in 2011. Over the past ten years, the proportion of global cannabis resin seizures occurring in Africa has been increasing. Africa accounted for 19 per cent of global cannabis resin seizures in 2011 (up from 8 per cent in 2001).

Afghanistan and Myanmar continued to account for the majority of illicit opium poppy cultivation worldwide; 84 per cent of global opium cultivation occurred in those two countries. In 2012, opium poppy cultivation in Afghanistan covered 154,000 ha, 18 per cent more than the previous year. However, since plant diseases and bad weather had damaged crops, potential opium production fell 36 per cent over

* Arabic, English and French are the working languages of the subsidiary body.



the same period. In Myanmar, cultivation increased by 17 per cent to 51,000 hectares and estimated opium production increased by 12 per cent to 690 tons. In 2011, seizures of opium remained at similar levels to the previous year, while seizures of heroin decreased in Africa and worldwide.

Three countries — Bolivia (Plurinational State of), Colombia and Peru — continued to account for virtually all cultivation of coca bush worldwide. The total area under coca bush cultivation was stable in 2011. Global seizures of cocaine dropped slightly in 2011; however, there was an increase in cocaine seizures reported by countries in Africa.

The clearest trend to emerge from the 2011 data is the increase in global seizures of amphetamine-type stimulants. In recent years, the global market for methamphetamine has expanded significantly. After relatively stable levels of seizures leading up to 2008, the annual amount of methamphetamine seized globally increased rapidly to nearly 88 tons in 2011. The level of global seizures of methamphetamine in 2011 is more than three times the level recorded in 2008. In 2011, African countries accounted for a relatively small share of global methamphetamine seizures. Law enforcement authorities continue to discover clandestine laboratories in West Africa used to manufacture amphetamine-type stimulants.

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I. Introduction

1. The present report provides an overview of developments in the production and trafficking of the main illicit drugs at the global and regional levels with a particular focus on Africa. The analysis is based on the latest information available to the United Nations Office on Drugs and Crime (UNODC).
2. Section II of this report covers illicit drug crop cultivation and the production of plant-based drugs. Cultivation and production data is based on the latest illicit crop-monitoring surveys published by UNODC.
3. Section III presents statistics on global seizures of cannabis, opiates, cocaine and amphetamine-type stimulants. The section has a specific focus on seizures within Africa. The primary source of information on seizures and drug trafficking is replies to the Annual Reports Questionnaire, part IV (illicit supply of drugs), submitted by Governments for 2011 and previous years.
4. Section IV highlights activities undertaken by African States to reduce the supply of illicit drugs. The section covers domestic activities, cross-border international cooperation and international technical cooperation activities that took place during 2010 and 2011. Analysis in section IV is based on Member States responses to supply reduction questions in part II (comprehensive approach to drug demand reduction and supply) of the Annual Reports Questionnaire.
5. In general, statistics on drug seizures offer a valid indirect indicator of trafficking trends. However, compared to some other regions, the availability of drug seizure data for countries within Africa is limited. Data on drug seizures in 2011 is available for 14 African countries. Drug seizure statistics for Africa should be treated with caution due to the relatively high level of missing data.

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

A. Cannabis

6. Unlike other illicit crops such as coca leaf and opium poppy, cannabis grows in varied environments and lends itself to diverse cultivation methods. That makes assessing the extent of its cultivation and production difficult. Reports of cultivation together with 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. Country reports provided by Member States at the previous HONLEA Africa¹ meeting indicate that the demand for cannabis herb is often met by local production. These reports also provide evidence that cannabis cultivation continues to occur in most countries in the region. Several countries refer to cannabis cultivation 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. Algeria,

¹ Country reports from the Twenty-second Meeting of Heads of National Drug Enforcement Agencies, Africa, Accra, 25-29 June 2012.

Nigeria, Uganda and Zambia reported destroying large quantities of cannabis plants and seeds.

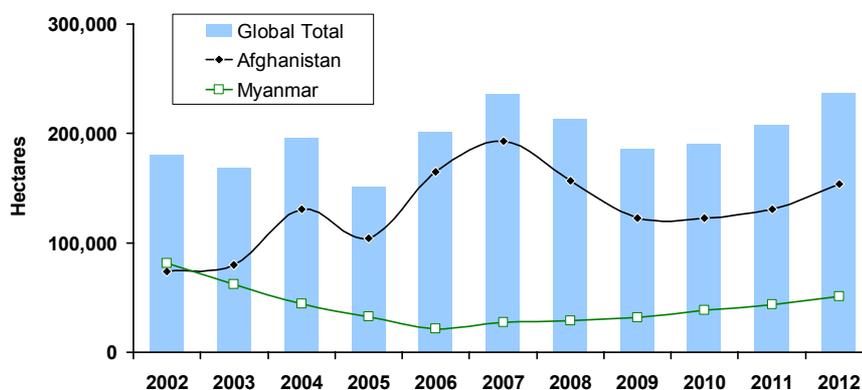
8. While cultivation of cannabis herb occurs throughout Africa, the production cannabis resin occurs mainly in Morocco. UNODC conducted a cannabis survey in Morocco during 2005 that estimated the total area under illicit cannabis cultivation to be 72,500 hectares (ha). Since then, Morocco estimated the net area under illicit cannabis cultivation (after eradication) to be 60,000 ha in 2008 and 47,500 ha in 2011.

9. In addition to Morocco, Afghanistan is also a major source country for cannabis resin. In 2011, UNODC and the Government of Afghanistan carried out jointly the third dedicated Afghanistan cannabis survey. The survey found that cultivation of cannabis plant and production of cannabis resin in Afghanistan appeared stable, and that there was no evidence of a substantive change in comparison with the previous UNODC cannabis surveys of 2009 and 2010.

B. Opium

10. In 2011, Afghanistan and Myanmar continued to account for the majority of illicit opium poppy cultivation worldwide (see figure I), with 84 per cent of global opium cultivation having occurred in those two countries. The global area under opium poppy cultivation increased from 191,000 ha in 2010 to 207,000 ha in 2011.²

Figure I
Illicit opium poppy cultivation worldwide, 2002-2012
 (Hectares)



11. Afghanistan remains the main country cultivating opium poppy. According to the 2012 Afghanistan opium survey, opium poppy cultivation in Afghanistan covered 154,000 ha in 2012, 18 per cent more than the 131,000 ha recorded the previous year. However, since plant diseases and bad weather had damaged crops, potential opium production fell 36 per cent over the same period, from 5,800 tons to 3,700 tons. Cultivation increased despite a significant 154 per cent increase in the area eradicated through Government efforts, which resulted in eradication of more

² United Nations Office on Drugs and Crime, *World Drug Report 2012*.

than 9,600 ha of opium poppy in 2012 (compared with 3,800 ha in 2011). The number of poppy-free provinces remained unchanged at 17. Ghor province in the west lost its “poppy-free” status in 2012, while Faryab province in the north regained it.

12. In 2012, 95 per cent of Afghanistan opium poppy cultivation was concentrated in the southern and western provinces. The southern provinces of Helmand, Kandahar, Oruzgan, Daykundi and Zabul accounted for 72 per cent of cultivation. Farah, Heart and Nimroz in the west accounted for 23 per cent of opium poppy cultivation.

13. The farm-gate prices for opium in Afghanistan remained at a relatively high level of \$196 per kilogram (kg), a price that continues to provide a strong incentive for farmers to start or resume opium poppy cultivation in the coming season. Due to low yields, the average gross income for opium poppy per hectare was down by 57 per cent to \$4,600 in 2012, from \$10,700 in 2011.

14. In South-East Asia, 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 (see figure II). While still small in comparison with the peak level of 1996, the area under opium poppy cultivation in Myanmar in 2012 (51,000 ha) is significantly higher than in 2006 (21,500 ha). The estimated opium production in Myanmar rose from 610 tons in 2011 to 690 tons in 2012, making Myanmar the region’s largest cultivator of opium poppy and largest producer of illicit opium.

15. 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 very 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). The 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, namely Phongsali, Louang Namtha, Houaphan and Louangphrabang. The estimated production of opium in the country increased from 25 tons in 2011 to 41 tons in 2012.

16. Opium poppy cultivation also took place in Mexico. Although recent estimates from the Government of Mexico on the net area under cultivation were not available, Mexico reported the eradication of 16,389 ha under cultivation in 2011. Authorities of that country reported that opium resin is trafficked mostly by land and is produced from opium poppy cultivated mainly on the Pacific coast.³

17. Opium poppy cultivation in Africa occurs on a relatively limited scale. In 2010, Egypt eradicated 222 ha of illicitly cultivated opium poppy and eradicated a much smaller amount in 2011 (0.5 ha). Authorities in Egypt reported that despite the existence of some poppy cultivation there were no registered cases of local

³ Country report of Mexico, Twenty-second Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean, Antigua, Guatemala, 1-5 October 2012.

heroin production.⁴ The only other country in Africa reporting the cultivation of opium poppy was Algeria. Algeria reported eradicating of 868 plants in 2010 and 340 plants in 2011.

C. Coca

18. Three countries — Bolivia (Plurinational State of), Colombia and Peru — continued to account for virtually all cultivation of coca bush worldwide. The total area under cultivation was stable in 2011, the balance of slight increases in Colombia and Peru and a decrease in Bolivia (Plurinational State of). The illicit extraction of cocaine alkaloids from coca leaves, a first step in the manufacture of cocaine, took place nearly exclusively in those three countries, which also accounted for most of the cocaine hydrochloride manufactured worldwide. Nevertheless, there were also indications of limited processing of cocaine in neighbouring countries, with laboratories seized in Ecuador, Mexico and Venezuela (Bolivarian Republic of) in 2011. Facilities detected in Europe in recent years were predominantly secondary extraction laboratories, which recovered cocaine impregnated, dissolved or incorporated into other substances or materials.

19. In Bolivia (Plurinational State of), coca bush cultivation decreased, amounting to 27,200 ha in 2011, down from 31,000 ha in 2010. The Yungas region of La Paz continued to account for approximately two thirds of that area of cultivation, with most of the remainder being in the Chapare region and a much smaller area in the municipality of Apolo. Data from law enforcement agencies points to intensified efforts to contain cultivation of coca bush and the manufacture of cocaine: eradication of coca bush cultivation rose from 8,200 ha in 2010 to 10,800 ha in 2011 (including voluntary and forced eradication).

20. In Colombia, coca cultivation was 64,000 ha in 2011, up from 62,000 ha in 2010. The slight increase in 2011 follows three year-on-year decreases and is less than half the 145,000 ha recorded in 2001. Authorities in Colombia noted that measures taken to reduce the area under coca bush cultivation included the manual eradication of 34,170 ha and the eradication of a further 103,302 ha by aerial spraying.

21. While coca bush cultivation was identified in 23 of the 32 departments of Colombia in 2011, three provinces (Nariño, Guaviare and Putumayo) accounted for 54 per cent of the total. In Nariño, Guaviare, Putumayo and three other departments, the area under cultivation increased, which contributed to the overall increase in coca bush cultivation in the country. However, 14 departments recorded decreases in 2011, and 3 reported stable levels of cultivation. The largest reductions in the area under coca cultivation between 2010 and 2011 took place in the departments of Córdoba (a reduction of 2,801 ha) and Antioquia (a reduction of 2,246 ha) in the central region. In 2011, all departments were below their highest peaks of coca bush cultivation, and the departments of Bolívar and Vichada reached the lowest levels of cultivation since at least 1999. The noteworthy reduction of coca bush cultivation in the department of Meta continues, falling from 18,740 ha in 2004 to 3,039 ha in 2011.

⁴ Country report of Egypt, Twenty-second Meeting of Heads of National Drug Law Enforcement Agencies, Africa, Accra, 25-29 June 2012.

22. In Peru, the net area under coca bush cultivation increased slightly, reaching 64,400 ha in 2011, compared with 61,200 ha in 2010. The total area under cultivation has gradually increased by 34 per cent from 2005 to 2011, but remains far below the high levels registered prior to 1996. In 2011, the area of coca bush cultivation in Peru (64,400 ha) was comparable to the cultivation area in Colombia (64,000 ha). However, in 2011 the trend in Peru of an increasing total area under cultivation was contained by eradication efforts: a total of 10,290 ha under coca bush cultivation were eradicated (including voluntary and forced eradication).

23. There is no evidence from the latest Annual Reports Questionnaires of coca bush cultivation or the manufacture of cocaine occurring in Africa. However, seizure data indicates that West Africa continues to be used for trafficking cocaine from South America to Europe.

III. Trends in illicit drug trafficking

24. The table below shows the reported quantities of seized drugs for the major drug groups in 2010 and 2011. For each drug type, the table shows the total amount seized both globally and by African countries during 2011 and 2010.

25. Nineteen per cent of global cannabis resin seizures and 9 per cent of global cannabis herb seizures occurred in Africa during 2011. However, seizures of the other illicit drugs (cocaine, heroin, amphetamine-type stimulants) accounted for less than 1 per cent of global seizures. In terms of seizures by weight, cannabis herb was the most seized drug in Africa during 2011 (522 tons), followed by cannabis resin (200 tons), cocaine (1.4 tons) and heroin (0.6 tons).

Table
Global and African Drug Seizures 2010 and 2011

Drug Type	2010		2011	
	Africa (kilograms)	Global (kilograms)	Africa (kilograms)	Global (kilograms)
Cannabis				
Cannabis herb	799,398	6,664,676	521,574	5,762,920
Cannabis resin	157,045	1,129,091	199,591	1,059,059
Coca				
Cocaine	1,008	608,857	1,447	595,318
Opiates				
Opium	50	492,439	12	491,372
Illicit morphine	11	19,303	–	62,357
Heroin	684	80,986	621	75,997
Amphetamine-type stimulants				
Amphetamine	3	19,581	10	30,973
Methamphetamine	29	50,880	45	87,996
“Ecstasy”	0.5	3,792	0.1	3,673

A. Cannabis

Cannabis herb — Global trends

26. Given the relative ease with which cannabis herb can be produced, demand is often met through local production, resulting in a pattern of trafficking flows tending to be rather localized in comparison with other plant-based illicit drugs. In 2011, cannabis herb continued to be consumed, trafficked and produced in most countries worldwide. Between 2006 and 2011, the level of global seizures ranged from 5,525 to 6,664 tons per year. Seizures in 2011 decreased to 5,763 tons from 6,665 tons in 2010.

27. In 2011, the largest proportion of global cannabis herb seizures continued to occur in North America. Broken down by region, cannabis herb seizures in North America accounted for 69 per cent of annual global seizures, 14 per cent of seizures were made in Central and South America and the Caribbean, 9 per cent in Africa, 5 per cent in Asia, 3 per cent in Europe and less than 1 per cent in Oceania.

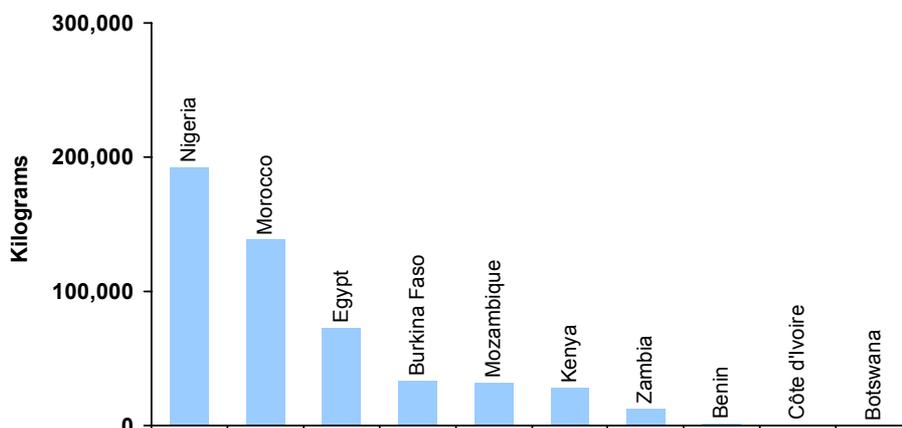
Cannabis herb — Africa

28. Only five African countries reported cannabis herb seizures in the 2011 Annual Reports Questionnaire and an additional five countries provided cannabis herb seizures as part of their country reports at the previous HONLEA Africa meeting.⁵ Figure II shows these ten annual seizures statistics. The high level of non-response from African States to the Annual Reports Questionnaire and the limited amount of other seizure data means it is difficult to determine trends in cannabis herb seizures within the region. However, even with the limited data available, it is clear that cannabis herb continues to be cultivated throughout the region.

Figure II

Reported cannabis herb seizures, Africa, 2011

(Kilograms)



⁵ Twenty-second Meeting of Heads of National Drug Enforcement Agencies, Africa, Accra, 25-29 June 2012.

Cannabis resin — Global trends

29. In contrast with cannabis herb, production of cannabis resin was concentrated in a small number of countries, among which the most prominent were Afghanistan and Morocco. Consequently, trafficking of cannabis resin followed flows that are more distinct. One of these flows is into Europe (mainly via Spain) from Morocco; the second is primarily from Afghanistan into and through neighbouring countries. In 2011, 28 countries seized over 1 ton of cannabis resin and 13 of these countries were in Europe.

30. The largest annual seizure of cannabis resin occurred in Spain (356 tons). Spain seized more than 6 times the amount of cannabis resin than any other country in Europe and nearly 3 times more than Morocco. Spain has an important role in preventing cannabis resin from reaching other European countries due to the countries proximity to Morocco, a known source country for cannabis resin.

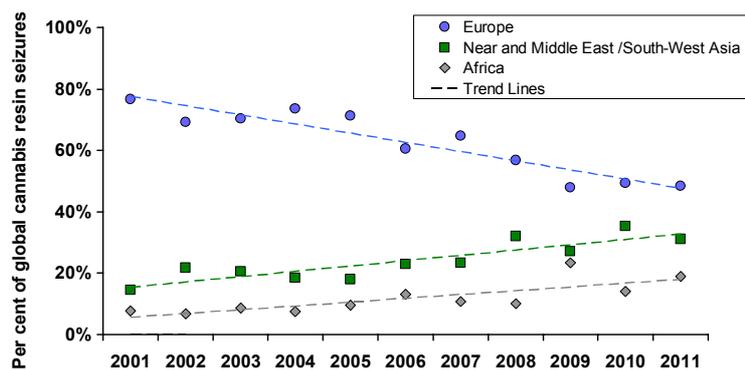
31. Spanish authorities reported⁶ that in the past decade, the quantities of hashish seized have shown a decreasing trend and that the average prices have been increasing with one gram of hashish costing €5.28 in 2011, 1 per cent higher than 2010 and 37 per cent higher than in 2002.

32. Data from the 2011 Annual Reports Questionnaires indicates that the majority of cannabis resin seized in Europe is likely to have been produced in Morocco. However, several European countries also listed Afghanistan and Pakistan as source countries for the drug. Since 2001, the proportion of global cannabis resin seizures occurring in Europe has been trending down, and the proportion of cannabis resin seized in Africa and the Near and Middle East has been trending upwards. These trends are shown in Figure III. The data suggests more seizures are occurring closer to the point of production rather than in the traditional consumer markets of Europe. In addition, the increase in seizures in the Near and Middle East suggests cannabis resin originating from Afghanistan and Pakistan is becoming more prominent within the global market.

Figure III

Cannabis resin seizures, Near and Middle East/South-West Asia, Europe and Africa, 2001-2011

(Per cent of global seizures)



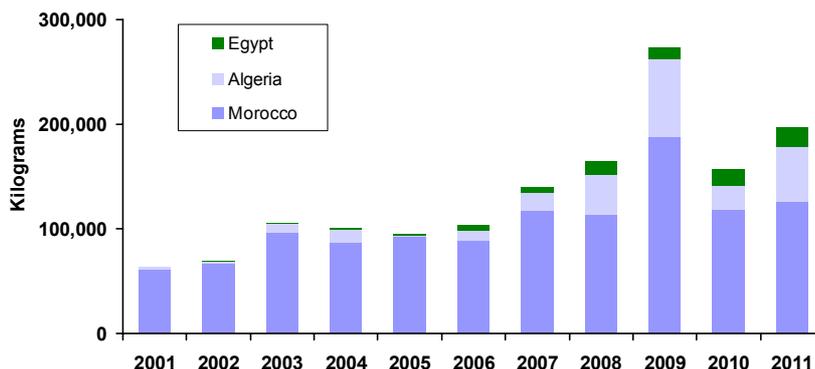
⁶ Country report of Spain, Twenty-second Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean, Antigua, Guatemala, 1-5 October 2012.

Cannabis resin — Africa

33. Four of the 28 countries that reported seizing more than 1 ton of cannabis resin during 2011 were in Africa. Within Africa the largest annual seizures occurred in Morocco (126 tons), followed by Algeria (53 tons), Egypt (18 tons) and Uganda (2 tons). Figure IV shows the trend in cannabis resin seizures in Morocco, Egypt and Algeria.

Figure IV

Cannabis resin seizures in selected African countries, 2001-2011 (Kilograms)



34. Authorities from Morocco noted that they continued to mobilize human and monetary resources to tackle the illicit cultivation of cannabis, and in particular highlighted efforts in the Northern provinces, which have resulted in a 65 per cent reduction in the area under cannabis cultivation. Authorities also drew attention to the increasing use of light aircraft by international criminal groups to traffic drugs out of Morocco. In the five years between 2007 and 2011, Morocco seized over 100 tons of cannabis resin per year, significantly higher than the average of 86 tons seized in the previous five-year period (2002-2006). The 126 tons seized in 2011 is the second highest annual seizure in the country since 2000.

35. In Algeria, the 53 tons of cannabis resin seized during 2011 was the second largest annual seizure in the country. Authorities noted the continued efforts by law enforcement to address the problem of cannabis resin transiting through the country.

36. In Egypt, authorities noted there were no registered cases of local production of cannabis resin due to the strong control over cultivation and the tight security measures to prevent such activity. Smuggling into Egypt took place across land and maritime borders and across legal points of entry, particularly the western borders of the country.

B. Opiates

37. The estimated annual prevalence of opiate use is between 0.3 and 0.5 per cent of the adult population⁷ (between 13 million and 21 million past-year users); the

⁷ United Nations Office on Drugs and Crime, *World Drug Report 2012*.

majority of these people are heroin users. As a result, heroin trafficking is of great concern. Seizures of opium and morphine continue to primarily occur within the Near and Middle East/South-West Asia, whereas seizures of heroin follow a much wider geographical distribution.

1. Opium

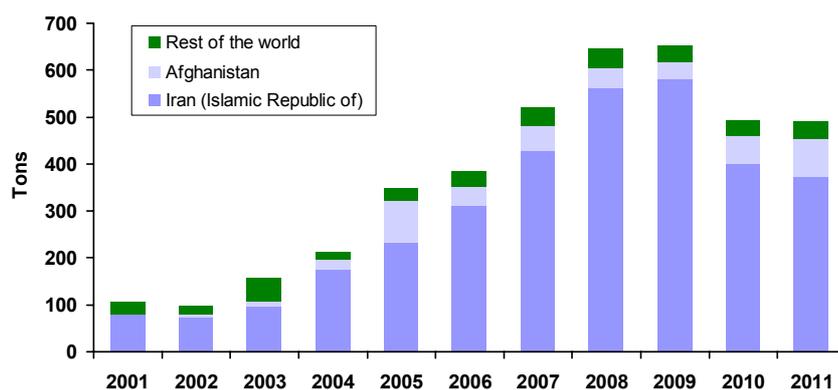
38. Global seizures of opium grew at a marked pace over the period 2002-2008 and stabilized in 2009 at 653 tons. Global opium seizures declined to 492 tons in 2010 and remained static in 2011 (491 tons). Since 2004, three countries — Afghanistan, Iran (Islamic Republic of) and Pakistan — have consistently accounted for more than 90 per cent of global opium seizures.

39. The Islamic Republic of Iran has reported the highest annual total of opium seized by a single country worldwide every year since 1980. Over the period 2002-2009 seizures increased almost eightfold, climbing from 73 tons to 580 tons. In 2010, the increasing trend started to reverse, and seizures in the country fell to 374 tons in 2011.⁸ In 2011, opium seizures in Afghanistan increased for the second consecutive year to 80 tons, the highest level since 2005.

Figure V

Global opium seizures, 2001-2011

(Tons)



40. Two countries in Africa reported seizures of opium in 2011. Egypt seized 11 kg of locally produced opium and Algeria seized just less than 1 kg (850 grams). Authorities in Egypt reported⁹ that Opium is the fourth most widely used illicit drug in the country and noted that poppy plants are cultivated in Sinai and Upper Egypt. Recent efforts by drug control forces, the armed forces and the air force have led to a reduction in poppy cultivation and a decrease in the supply of opium to the illicit market.

⁸ Information provided by the Iranian National Drug Control Headquarters.

⁹ Country report of Egypt, Twenty-second Meeting of Heads of National Drug Enforcement Agencies, Africa, Accra, 25-29 June 2012.

2. Morphine

41. As is the case with opium, seizures of 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. Morphine seizures in the Near and Middle East/South-West Asia had generally been decreasing between 2006 and 2010, however, morphine seizures within Afghanistan increased significantly in 2011, making the recent trend difficult to identify. Future data will reveal if the big increase in seizures for 2011 is a one-off spike, or if the increase signals the start of an increasing trend. Seizures amounted to 50.8 tons in Afghanistan, 6.8 tons in Iran (Islamic Republic of) and 4.3 tons in Pakistan.

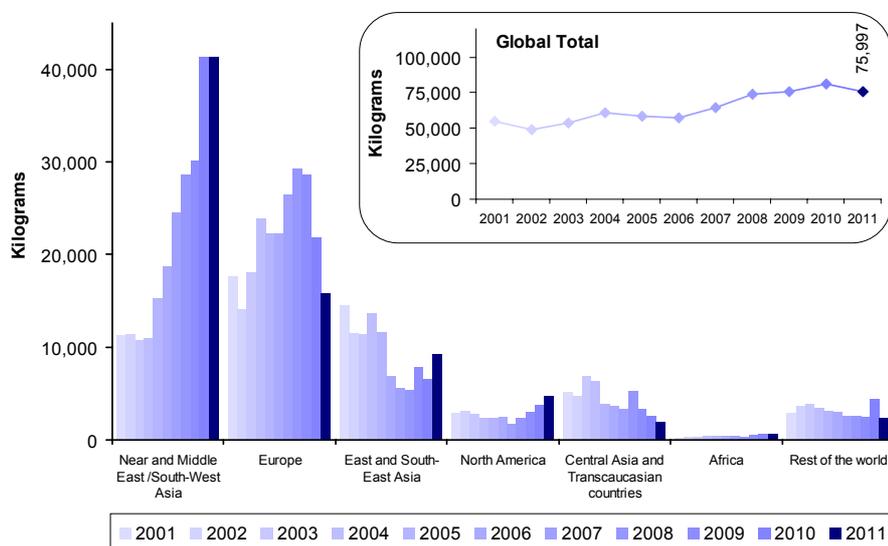
42. No seizures of illicit morphine were reported to UNODC by African countries in the 2011 Annual Reports Questionnaires.

3. Heroin

Heroin — Global Trends

43. Global heroin seizures have been trending upward since 2002 (see figure VI), but dropped back to just under 76 tons in 2011 (from 81 tons in 2010). The annual decrease is due to a significant fall in seizures in Europe, particularly in South-East Europe where seizures decreased for the second consecutive year. Seizures in East and South-East Asia and North America increased in 2011, while seizures in the Near and Middle East/South-West Asia stabilized after a sustained period of annual increases since 2004.

Figure VI
Global heroin seizures, 2001-2011
(Kilograms)



44. Between 2003 and 2010, seizures of heroin in Iran (Islamic Republic of) increased eightfold, reaching 27 tons in 2010 — equivalent to seven year-on-year increases of 35 per cent. That trend ended in 2011, with seizures in the country

falling 15 per cent, to 23 tons.¹⁰ In Pakistan, seizures of heroin doubled between 2009 and 2010, reaching 4.2 tons. Heroin seizures continued to increase in 2011, with seizures reaching 7.6 tons, the highest level in that country since 2000.

45. Heroin seizures in Europe decreased in 2011 for the third consecutive year. Several countries contributed to the annual decrease, notably Hungary (decrease of 97 per cent), Slovenia (decrease of 88 per cent), the Czech Republic (decrease of 84 per cent), Sweden (decrease of 64 per cent), Belgium (decrease of 64 per cent), Latvia (decrease of 61 per cent), Greece (decrease of 34 per cent) and Austria (decrease of 32 per cent). The most notable exceptions were Poland (increase of 90 per cent) and Spain (increase of 77 per cent). Spain seized 413 kg of heroin in 2011, and authorities of that country noted that heroin seizures in the past decade had shown a generally increasing trend.¹¹

46. While heroin seizures have been reducing in Europe in recent years, seizures have been increasing in North America. The United States of America, Mexico and Canada all reported an increase in heroin seizures during 2011. In 2011, authorities in North America seized 4.7 tons of heroin (just below the 5.9 tons seized in West and Central Europe). United States authorities noted that the availability of heroin continued to increase in 2011 due to traffickers expanding into new markets. Heroin seizures along the Southwest Border of the United States have increased steadily since 2007.

Heroin — Africa

47. During 2011, three East African countries reported heroin seizures. These countries were Kenya, Tanzania and Uganda. In West Africa, Benin, Nigeria, Ghana, Côte d'Ivoire and Burkina Faso reported seizing heroin.

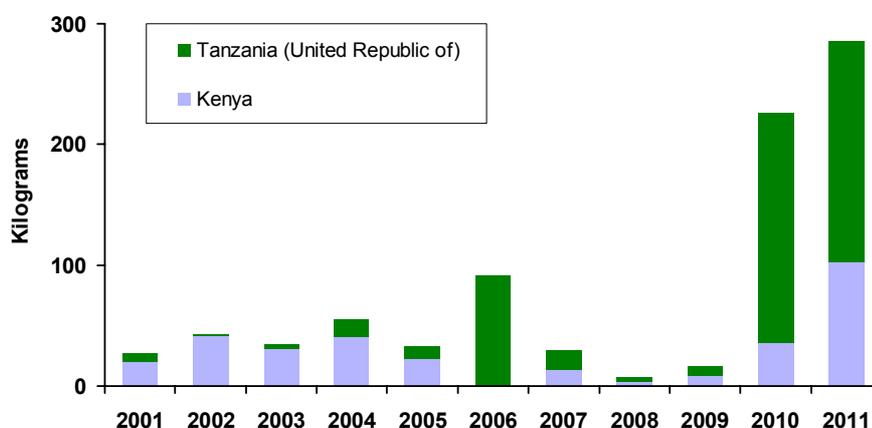
48. Police in Kenya seized 103 kg of heroin in 2011, well above the 35 kg seized during 2010. Authorities noted¹² that Kenya is a transit point for heroin destined for Europe and the United States. Heroin arrives in Kenya from India and Pakistan concealed either in sea cargo or by air. Once heroin arrives in Kenya, it is trafficked either directly to Europe or via West African countries to Europe or the United States. Some heroin trafficked through Kenya may also be destined for South Africa. In Tanzania, authorities seized 182 kg of heroin in 2011, just less than the record 191 kg seized in 2010. The only other reported annual seizure in East Africa was from Uganda where law enforcement seized 5 kg of heroin in 2011. Figure VII shows reported heroin seizures in Tanzania and Kenya since 2001.

¹⁰ Information provided by the Iranian National Drug Control Headquarters.

¹¹ Country report of Spain, Twenty-second Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean, Antigua, Guatemala, 1-5 October 2012.

¹² Country report of Kenya, Twenty-second Meeting of Heads of National Drug Enforcement Agencies, Africa, Accra, 25-29 June 2012.

Figure VII
Heroin seizures in Tanzania and Kenya, 2001-2011
 (Kilograms)



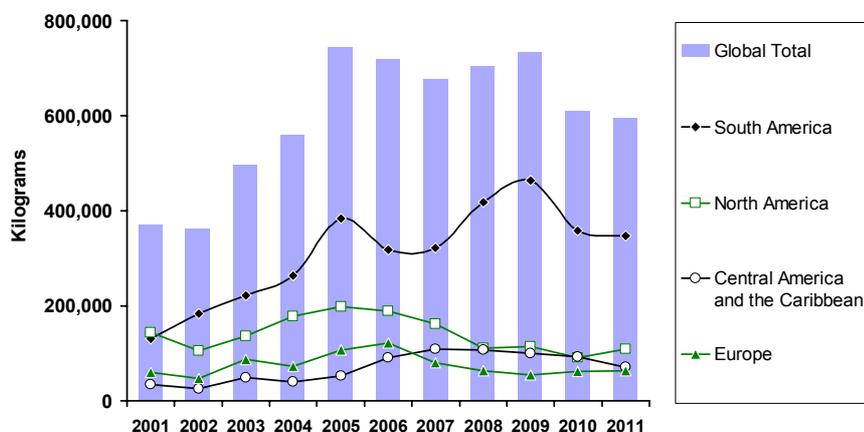
49. Each year between 2001 and 2010, Nigeria seized more heroin than any other West African country did; Nigerian authorities seized an average of 82 kg of heroin per year during this period. However, in 2011, Nigeria seized 32 kg of heroin and the largest annual seizure in West Africa occurred in the neighbouring country of Benin. Law enforcement in Benin seized 200 kg of heroin in 2011. Authorities from Benin noted that heroin seized in the country was produced in South-East Asia and passed through East Africa and Côte d'Ivoire before entering Benin.

C. Cocaine

Cocaine — Global trends

50. After a relatively stable period from 2005 to 2009, global cocaine seizures declined in both 2010 and 2011. While seizures have decreased, the geographic distribution has remained fairly stable with the major producing and transit regions of South America, Central America and the Caribbean accounting for 70.6 per cent of global seizures in 2011 (compared to 74 per cent in 2009). Seizures in the traditional consumer markets of North America and Europe accounted for 28.7 per cent of global cocaine seizures. Only 0.8 per cent of seizures occurred in the rest of the world (Asia, Africa and Oceania). Figure VIII shows the trend in selected regions and subregions between 2001 and 2011.

Figure VIII
Global cocaine seizures, 2001-2011
(kilograms)



51. Among South American countries, Colombia continued to seize the largest quantities of cocaine by far, but seizures in that country fell from 165 tons in 2010 to 146 tons in 2011. Colombian authorities reported that, in terms of quantity of cocaine seized, the most successful seizure operations were maritime operations.¹³ An operation conducted jointly with Honduras resulted in the seizure of 8,963 kg of cocaine, and an operation carried out in July 2011, under an agreement on maritime interdiction between Colombia and the United States, resulted in the seizure of 6,900 kg of cocaine. Authorities in Honduras reported seizing 16,800 kg of cocaine in 2011, by far the largest annual amount seized by that country.

52. In Peru, cocaine seizures fell by 7 tons to just under 11 tons in 2011 — the lowest level in the country since 2003. In contrast, seizures in the Plurinational State of Bolivia rose for the second consecutive year, to a new record level of 34 tons. Over the past four years, there has been a noticeable increase in cocaine seizures in the Plurinational State of Bolivia. Between 2007 and 2011, Bolivia seized an average of 30 tons of cocaine per year, a significantly larger amount than the average of 11 tons seized between 2001 and 2006.

53. According to Ecuadorean authorities,¹⁴ international trafficking networks are increasingly using Ecuador for stockpiling, storage and distribution of illicit drugs, trafficking in precursor chemicals and other drug-related offences. Seizures of cocaine in the country increased slightly to 21 tons in 2011, up from 15 tons in 2010. However, seizures are still significantly below the 65 tons seized in 2009. In 2011, the amount of cocaine seized in Brazil (24 tons), Chile (9 tons) and Argentina (4 tons) decreased from the previous year, while the amount of cocaine seized in the Bolivarian Republic of Venezuela increased slightly, to 26 tons.

¹³ Country report of Colombia, Twenty-second Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean, Antigua, Guatemala, 1-5 October 2012.

¹⁴ Country report of Ecuador, Twenty-first Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean, Santiago, 3-7 October 2011.

54. Cocaine continues to be trafficked to the United States and Canada through Central America from South America. However, the amount of cocaine seized in the United States has dropped in recent years. Annual cocaine seizures in the United States peaked at over 165 tons in 2006, but dropped below 100 tons in 2008 and remained below 100 tons in 2009, 2010 and 2011.

Cocaine — Africa

55. A secondary route for cocaine trafficked to Europe involves the use of countries in Africa, notably West Africa, as transit countries. There are difficulties in assessing the long-term trends due to gaps in the information base for Africa. However, there are clear indications that the route continues to be used to traffic cocaine to Europe. Since 2003, at least one country in West Africa has reported annual cocaine seizures of over 400 kg. This trend continued in 2011, with annual seizures of over 400 kg recorded in Nigeria, Togo and Benin.

56. The 420 kg of cocaine seized in Togo during 2011 included 384 kg seized in the port of Lomé. Authorities found the cocaine in containers hidden in pallets, with soya oil stored on top.¹⁵ Nigerian authorities noted¹⁶ that frequent seizures of cocaine and heroin were made at the country's international airports, especially Lagos and Abuja international airports.

D. Amphetamine-type stimulants

Amphetamine — Global trends

57. Global amphetamine seizures followed a generally increasing trend over the period 2001-2009, driven in part by increases in Captagon seizures registered in the Near and Middle East/South-West Asia, which as a whole overtook Europe in terms of total seizure quantities. Seizures decreased to 19 tons in 2010 but rebounded to 24 tons in 2011 and remain below the peak of 33 tons recorded in 2009.

58. Saudi Arabia is a major consumer market for Captagon tablets and for the ninth consecutive year recorded the largest annual seizure of amphetamine by a single country. Seizures in Saudi Arabia rose from 8.8 tons in 2010 (52 million tablets) to 11.5 tons (67 million tablets). In the Syrian Arab Republic, seizures rose from 2.1 tons (12 million tablets) in 2010 to 3.9 tons (23 million tablets) in 2011, the highest level recorded in that country and slightly above the 3.7 tons (22 million tablets) recorded in 2009.

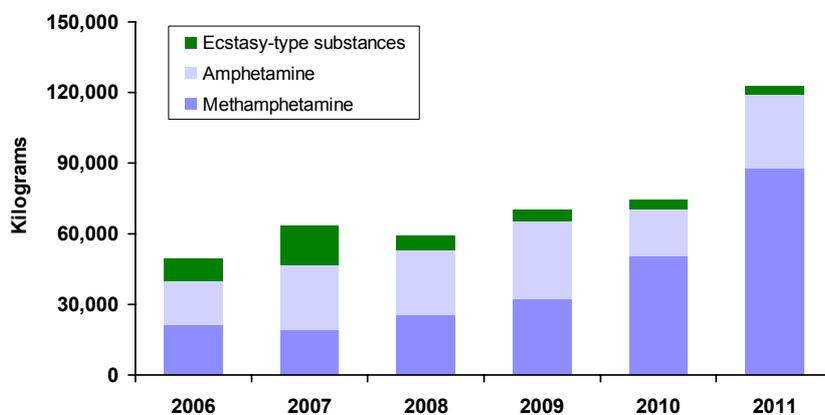
Methamphetamine — Global trends

59. Between 2008 and 2011, the global market for methamphetamine expanded significantly (see figure IX). After relatively stable levels of seizures leading up to 2008, the annual amount of methamphetamine seized globally increased rapidly to nearly 88 tons in 2011. The level of global seizures of methamphetamine in 2011 is more than three times the level recorded in 2008.

¹⁵ Country report of Togo, Twenty-second Meeting of the Heads of National Drug Enforcement Agencies, Africa, Accra, 25-29 June 2012.

¹⁶ Country report of Nigeria, Twenty-second Meeting of the Heads of National Drug Enforcement Agencies, Africa, Accra, 25-29 June 2012.

Figure IX
Global amphetamine-type stimulant seizures, 2006-2011
 (Kilograms or equivalents)



60. Large quantities of methamphetamine continue to be illicitly manufactured in Mexico, and seizures in Mexico have risen sharply. In 2011, over 30 tons (30,740 kg) of methamphetamine were seized in Mexico, up from 13 tons in 2010; prior to 2009, seizures in Mexico had never exceeded 1 ton. The amount of methamphetamine seized in Mexico in 2011 is equivalent to the global total just two years prior. Mexican authorities identified two major methamphetamine-producing regions: in the north (the states of Sinaloa, Sonora and Baja California) and the central region (Michoacán, Jalisco and Guanajuato).

61. Seizures of methamphetamine continued to rise markedly in East and South-East Asia, from 16 tons in 2009 to 20 tons in 2010 and 25 tons in 2011. China and Thailand accounted for 94 per cent of methamphetamine seizures in East and South-East Asia during 2011.

62. China continued to be affected by the manufacture, trafficking and consumption of methamphetamine. Throughout the period 2005-2009, annual methamphetamine seizures reported by China ranged between 6 tons and 7 tons; in 2011, seizures reached 14.3 tons. Authorities in China indicated that methamphetamine was trafficked across the border from Myanmar into China. Illicit manufacture of amphetamine-type stimulants appeared to continue to take place in China, with authorities reporting the detection of 357 clandestine laboratories in 2011 (down from 378 laboratories in 2010).

63. Thailand seized 9.6 tons of methamphetamine in 2011, up from 5.6 tons in 2010. Authorities in Thailand reported that methamphetamine pills remain the most abused and trafficked drug in Thailand and that the abuse of and trafficking in crystallized methamphetamine continues to escalate.¹⁷ Authorities also stated that traffickers have been aggressively introducing methamphetamine in the market by using different campaigns such as giving out free samples, reducing the price and selling in small quantities. Thai authorities identified Myanmar as the source

¹⁷ Country report of Thailand, Thirty-sixth Meeting of Heads of National Drug Law Enforcement Agencies, Asia and the Pacific, Bangkok, 30 October-2 November 2012.

country for methamphetamine and the Lao People's Democratic Republic and Cambodia as transit countries.

“Ecstasy”-type substances — Global trends

64. In recent years, the global market for “ecstasy” showed a marked decline, with global seizures falling from the record level of 17 tons in 2007 to 3.5 tons in 2011. Global seizures of “ecstasy”-type substances have decreased for four consecutive years.

65. The majority of “ecstasy” seizures occurred in North America and Europe. In 2011, seizures in the United States halved to 521 kg (from 1,069 kg in 2010), and Canadian seizures fell significantly to 192 kg (from 529 kg in 2010). Four of the six other countries who seized over 100 kg of “ecstasy”-type substances were in Europe (Netherlands, France, Turkey and the United Kingdom of Great Britain and Northern Ireland). Australia and Indonesia were the only countries outside of North America and Europe where over 100 kg of “ecstasy”-type substances was seized.

Amphetamine-type stimulants — Africa

66. Uganda was the only country in Africa to report seizures of amphetamine in 2011. The country reported seven cases that resulted in the seizure of 10 kg of amphetamine. In the 2011 Annual Reports Questionnaire, Ugandan authorities reported that the amphetamine arrived in Uganda from West Africa, and was destined for India via Ethiopia.

67. Seizure data suggests that production of methamphetamine is more prevalent in West Africa than other parts of Africa. Benin and Ghana seized over 20 kg of methamphetamine during 2011. These two countries also reported methamphetamine seizures in 2010. Since 2011, Nigeria has reported¹⁸ the identification of two clandestine laboratories used for the illicit production of methamphetamine in Lagos. One of these laboratories had the capacity of producing 25 kg of methamphetamines per cycle.

68. Two African countries, Egypt and Botswana, reported seizing “ecstasy”-type substances in 2011 — in both cases the annual amount seized was less than 150 grams. The “ecstasy” seized in Egypt during 2011 was mostly from Europe and North America, and arrived through legal entry points in personal luggage.

IV. Supply reduction activities in Africa

Analysis of ARQ Part II

69. This section provides a brief summary of the responses from African countries to sections of Part II of the Annual Reports Questionnaire. Part II of the questionnaire is entitled “Comprehensive approach to drug demand reduction and supply” and approximately half of Part II is devoted to questions related to reducing the supply of illicit drugs. Questions 16 to 37 of the questionnaire ask about

¹⁸ Country report of Nigeria, Twenty-second Meeting of the Heads of National Drug Enforcement Agencies, Africa, Accra, 25-29 June 2012.

domestic supply reduction activities, cross-border and international cooperation, international technical cooperation, and the control of precursors.

70. The current set of survey questions was first used by UNODC in the 2010 Annual Reports Questionnaire. Ninety-three countries completed Part II of the questionnaire in 2010, and 91 countries completed Part II in 2011. At the time of writing, 2012 data was available for 20 countries. Consequently, analysis is based on responses to the 2010 and 2011 survey.

71. Because of the limited amount of comparable data for Africa, the majority of the analysis is based on a combination of the responses to the 2010 and 2011 survey, rather than a comparison between 2010 and 2011. In 2010, 9 African countries completed Part II of the Annual Reports Questionnaire and 9 African countries also responded in 2011. Five countries completed the survey in both 2010 and 2011. For those countries that provided a response in both 2010 and 2011, the latest response has been used in the analysis.

Domestic activities

72. Two African countries, who reported that they did not have an approved written strategy with a supply reduction component in 2010, reported that an approved strategy was in place in 2011. One of these countries also reported that a written strategy against organized crime, approved by the Government, and with a specific component to reduce drug supply, had been approved in 2011.

73. The survey asked Member States about activities undertaken to reduce the supply of illicit drugs. During 2010 and 2011, 89 per cent of responding African countries reported the monitoring of amphetamine-type stimulants and illicit substances, 80 per cent reported the use of forensic intelligence and the monitoring of precursor chemicals, 70 per cent reported undertaking research and evaluation activities, while 60 per cent reported undertaking programmes for the eradication of illicit drug crops. Two countries, Egypt and Morocco, reported that alternative development activities took place.

74. In all responding countries, the police, customs or a specialized drug law enforcement agency had a mandate to reduce drug supply. The military is mandated to reduce drug supply in 66 per cent of countries.

75. All responding African countries reported using informants as an investigative technique to gather evidence and 90 per cent of countries reported using undercover techniques during the survey period. However, fewer States reported using electronic surveillance (67 per cent) or controlled delivery (64 per cent) as investigative techniques.

76. Forty-four per cent of countries had a system in place to monitor the sale of pharmaceutical preparations containing narcotic drugs or psychotropic substances under international control over the Internet.

Cross-border and international cooperation

77. The data suggests a well-established culture of cooperation between law enforcement agencies in the region. All responding Member States reported exchanging information with law enforcement in different countries. However, there are still areas where cooperation could be further enhanced. For example,

67 per cent of countries reported engaging in joint operations with other countries and 44 per cent reported exchanging liaison officers. Several of the countries who undertook joint operations noted that the joint operations resulted in significant seizures of cocaine and heroin.

78. Sixty-three per cent of African countries identified slow formal procedures as a problem in cooperating with counterparts in other countries. In addition, half of the responding countries identified the lack of agreements enabling operational cooperation/mutual legal assistance as a problem. Fewer countries identified the lack of cooperation from counterparts (33 per cent), or the inability to identify counterparts to be contacted (33 per cent) as a problem.

International technical cooperation

79. Eighty per cent of countries from Africa reported receiving technical assistance in the area of drug supply reduction either from another country or from an international organization. Of the countries who received assistance, all (100 per cent) received training, 80 per cent received data-sharing assistance, 71 per cent received equipment, 43 per cent received software and 40 per cent received financial assistance. All countries who received assistance reported the assistance was not sufficient for the needs of the country.

80. Two countries reported providing assistance, in the form of training, to other countries in the region.

V. Conclusions

81. Cannabis continues to be the most widely cultivated, produced, trafficked and consumed illicit drug and cannabis cultivation continues to occur in most countries in Africa. Global cannabis herb seizures decreased in 2011 and seizures in Africa also decreased. Seizures in Africa decreased from 799 tons in 2010 to 522 tons in 2011. Global cannabis resin seizures decreased for the third consecutive year; however seizures in Africa increased in 2011. Over the past ten years, the proportion of global cannabis resin seizures occurring in Africa has been increasing. Africa accounted for 19 per cent of global cannabis resin seizures in 2011 (up from 8 per cent in 2001).

82. Afghanistan and Myanmar continued to account for the majority of illicit opium poppy cultivation worldwide; 84 per cent of global opium cultivation occurred in those two countries. In 2012, opium poppy cultivation in Afghanistan covered 154,000 ha, 18 per cent more than the previous year. However, since plant diseases and bad weather had damaged crops, potential opium production fell by 36 per cent over the same period. In Myanmar, cultivation increased by 17 per cent to 51,000 ha and estimated opium production increased by 12 per cent to 690 tons. In 2011, seizures of opium remained at similar levels to the previous year, while seizures of heroin decreased in Africa and worldwide.

83. Three countries — Bolivia (Plurinational State of), Colombia and Peru — continued to account for virtually all cultivation of coca bush worldwide. The total area under coca bush cultivation was stable in 2011. Global seizures of cocaine

dropped slightly in 2011; however, there was an increase in cocaine seizures reported by countries in Africa.

84. The clearest trend to emerge from the 2011 data is the increase in global seizures of amphetamine-type stimulants. In recent years, the global market for methamphetamine has expanded significantly. After relatively stable levels of seizures leading up to 2008, the annual amount of methamphetamine seized globally increased rapidly to nearly 88 tons in 2011. The level of global seizures of methamphetamine in 2011 is more than three times the level recorded in 2008. In 2011, African countries accounted for a relatively small share of global methamphetamine seizures. Law enforcement authorities continue to discover clandestine laboratories in West Africa used to manufacture amphetamine-type stimulants.
