Global situation of illicit drug cultivation, production and trafficking

UNAFEI’s 169th International Training Course
Tokyo, 30th May 2018

Cultivation and production
coca/cocaine, opium/heroin

Source: UNODC coca and opium surveys in various countries, responses to the annual report questionnaire; United States, Department of State, International Narcotics Control Strategy Report, various years.
Global opium poppy cultivation, 1998-2017

Dry Afghan farm-gate opium prices, October 2004 - February 2018
Prices of best quality acetic anhydride in southern and western Afghanistan and in eastern Afghanistan, 2016-2017

Source: CNPA (Kabir Khan head of Precursor Unit), based on data collected by CNPA informants; Sept.

Opium poppy cultivation, 2017

Afghanistan
(328,000 ha; +63%; 301,000-355,000 ha)

Myanmar
(41,000 ha; -25%; 30,200-51,900 ha)

Sources: UNODC, Opium Surveys in Afghanistan, Myanmar in 2017 and Mexico 2015.

*change as compared to 2016;
Countries reporting largest quantities of opiates seized, 2015

Opium

<table>
<thead>
<tr>
<th>Country</th>
<th>Seizures (kilograms)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Iran (Islamic Republic of)</td>
<td>58,992</td>
</tr>
<tr>
<td>Pakistan</td>
<td>26,231</td>
</tr>
<tr>
<td>Afghanistan</td>
<td>24,804</td>
</tr>
<tr>
<td>China</td>
<td>22,598</td>
</tr>
<tr>
<td>France</td>
<td>19,040</td>
</tr>
<tr>
<td>Mexico</td>
<td>15,226</td>
</tr>
<tr>
<td>United States</td>
<td>14,157</td>
</tr>
<tr>
<td>Colombia</td>
<td>13,067</td>
</tr>
<tr>
<td>India</td>
<td>11,075</td>
</tr>
<tr>
<td>Myanmar</td>
<td>10,475</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>9,395</td>
</tr>
<tr>
<td>Australia</td>
<td>8,358</td>
</tr>
<tr>
<td>Russia</td>
<td>8,015</td>
</tr>
<tr>
<td>France</td>
<td>7,818</td>
</tr>
<tr>
<td>Indonesia</td>
<td>7,111</td>
</tr>
<tr>
<td>Mexico</td>
<td>6,538</td>
</tr>
<tr>
<td>United States</td>
<td>5,308</td>
</tr>
</tbody>
</table>

Morphine

<table>
<thead>
<tr>
<th>Country</th>
<th>Seizures (kilograms)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Iran (Islamic Republic of)</td>
<td>762</td>
</tr>
<tr>
<td>Pakistan</td>
<td>191</td>
</tr>
<tr>
<td>China</td>
<td>186</td>
</tr>
<tr>
<td>United States</td>
<td>80</td>
</tr>
<tr>
<td>Mexico</td>
<td>61</td>
</tr>
<tr>
<td>Colombia</td>
<td>26</td>
</tr>
<tr>
<td>India</td>
<td>18</td>
</tr>
<tr>
<td>Afghanistan</td>
<td>16</td>
</tr>
<tr>
<td>Turkey</td>
<td>18</td>
</tr>
<tr>
<td>Hungary</td>
<td>3</td>
</tr>
<tr>
<td>Russia</td>
<td>2</td>
</tr>
<tr>
<td>Canada</td>
<td>1</td>
</tr>
<tr>
<td>Russian Federation</td>
<td>1</td>
</tr>
</tbody>
</table>

Heroin

<table>
<thead>
<tr>
<th>Country</th>
<th>Seizures (kilograms)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pakistan</td>
<td>16,543</td>
</tr>
<tr>
<td>China</td>
<td>13,110</td>
</tr>
<tr>
<td>Turkey</td>
<td>8,796</td>
</tr>
<tr>
<td>United States</td>
<td>8,294</td>
</tr>
<tr>
<td>Afghanistan</td>
<td>7,032</td>
</tr>
<tr>
<td>China</td>
<td>7,308</td>
</tr>
<tr>
<td>Vietnam</td>
<td>5,308</td>
</tr>
<tr>
<td>Italy</td>
<td>1,999</td>
</tr>
<tr>
<td>India</td>
<td>1,616</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>1,114</td>
</tr>
<tr>
<td>Australia</td>
<td>823</td>
</tr>
<tr>
<td>France</td>
<td>818</td>
</tr>
</tbody>
</table>

Source: UNODC, responses to the annual report questionnaire.

Aggregate seizures of heroin and morphine, 2015

Note: The present map includes data from countries and territories for which official seizure data are available and amount to more than 10 kg. The seizure data are presented as reported (no adjustment made for purity).
Main opiate trafficking flows, 2012-2016

Source: UNODC elaboration based on responses to the annual reports questionnaire and individual drug seizures

Significant individual heroin seizures, January 2016-December 2017*

*latest 500 seizure cases

Source: UNODC (AOTP) and Paris Pact, Drugs Monitoring Platform
B. THE COCAINE MARKET

Global cultivation usage-free previous year

Global seizures usage-free previous year

Global production usage-free previous year

Global number of users

Note: Data refer to 2015. Seizures are of cocaine of varying purity. Estimates of illicit cultivation and eradication of coca bush, manufacture of cocaine and prevalence of cocaine use are available in the annex of booklet 2.

Global coca cultivation and cocaine manufacture, 1998-2016

Source: UNODC coca cultivation surveys in Colombia, Peru and the Plurinational State of Bolivia
Coca bush cultivation, 1990-2016

2015-2016
Colombia: +52%
Peru: +9%
Bolivia: +14%
Global: +36%

2013-2016
Colombia: +76%
Peru: -12%
Bolivia: +0.4%
Global: 76%

2000-2016
Colombia: -11%
Peru: +1%
Bolivia: +58%
Global: -4%

Sources: UNODC, Coca Surveys, Colombia, Peru and Bolivia (Planillas State of) and US Department of State, INCSR (prior to 2006).

Main cocaine trafficking flows

Source: UNODC elaboration, based on responses to annual report questionnaire and individual drug seizure databases.

Notes: The trafficking flows are determined on the basis of country of entry/destination, transit and destruction of seized drugs as reported by Member States in the annual report questionnaire and individual drug seizure database, as such, these are to be considered as broadly indicative of existing trafficking routes, while annual secondary flows may not be reflected. Thin arrows represent the direction of supply; the origins of the arrows indicate either the area of manufacture or the case of last provenance, and points of arrow indicate either the area of consumption or the case of last destruction of trafficked.
C. THE CANNABIS MARKET

Global seizures

- 5,781 tons cannabis herb
- 1,536 tons cannabis resin

2015

Global number of users

- 183 million users

Note: Data refer to 2015. Estimates of illicit cultivation, production and eradication of cannabis and prevalence of cannabis use are available in the annex of booklet 2.

Global quantities of cannabis resin and herb seized, 1998-2015

Source: UNODC, based on responses to the annual report questionnaire.
Global quantities of cannabis seized, annual average, by product and by country, 2010-2015

<table>
<thead>
<tr>
<th>Cannabis herb</th>
<th>Quantity seized (tons)</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>200</td>
</tr>
<tr>
<td>Mexico</td>
<td>150</td>
</tr>
<tr>
<td>Paraguay</td>
<td>100</td>
</tr>
<tr>
<td>Colombia</td>
<td>50</td>
</tr>
<tr>
<td>Nigeria</td>
<td>20</td>
</tr>
<tr>
<td>Egypt</td>
<td>10</td>
</tr>
<tr>
<td>Brazil</td>
<td>5</td>
</tr>
<tr>
<td>Morocco</td>
<td>5</td>
</tr>
<tr>
<td>Bahamas</td>
<td>2</td>
</tr>
<tr>
<td>Argentina</td>
<td>2</td>
</tr>
<tr>
<td>India</td>
<td>2</td>
</tr>
<tr>
<td>Turkey</td>
<td>2</td>
</tr>
<tr>
<td>Other</td>
<td>10</td>
</tr>
</tbody>
</table>

Proportion of global quantity seized (percentage)

<table>
<thead>
<tr>
<th>Cannabis resin</th>
<th>Quantity seized (tons)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>300</td>
</tr>
<tr>
<td>Pakistan</td>
<td>200</td>
</tr>
<tr>
<td>Morocco</td>
<td>100</td>
</tr>
<tr>
<td>Algeria</td>
<td>100</td>
</tr>
<tr>
<td>Afghanistan</td>
<td>50</td>
</tr>
<tr>
<td>Iran (Islamic Rep. of)</td>
<td>30</td>
</tr>
<tr>
<td>France</td>
<td>20</td>
</tr>
<tr>
<td>Italy</td>
<td>10</td>
</tr>
<tr>
<td>Egypt</td>
<td>5</td>
</tr>
<tr>
<td>Turkey</td>
<td>5</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>5</td>
</tr>
<tr>
<td>Portugal</td>
<td>5</td>
</tr>
<tr>
<td>Other</td>
<td>10</td>
</tr>
</tbody>
</table>

Proportion of global quantity seized (percentage)

Source: UNODC, based on responses to the annual report questionnaire.

Regulations of recreational cannabis use

Jurisdictions in the United States allowing recreational use of cannabis, medical use of cannabis and with no access to cannabis, May 2017

- Recreational
- Medical
- Limited medical
- No access laws

Source: Based on information from the National Conference of State Legislatures (NCSL) as of 12 May 2017.
Notes: The boundaries shown on this map do not imply official endorsement or acceptance by the United Nations.
Expanding market: Amphetamine-type stimulants (ATS)

The synthetic drugs market has never been so complex and widely spread.
Sources of "ecstasy"-type substances, 2015

The present map includes data from countries and territories for which official seizure data are available and amount to more than 1 kg.

Breadth 2004-2015

- Increase (+60%)
- Stable (+5%)
- Decline (-40%)

No comparable data available for previous year

Source: UNODC annual report questionnaire data, supplemented by other official sources.

Note: The speculative and trend chart and the proportions used in the present map are mainly based on data or opinion or both of an individual or group, by UNODC, in the form of a report, or publication, or presentation, or oral or telephone communication, or even personal belief.

This quantity reflects the sum of all seizures in 2015, including those from the UNODC/UNODC Combined Seizure List. The data are presented in terms of the total weight of seizures recorded in 2015. The weight is presented in the form of a number, with the unit of measurement (e.g., kg, lb). The data are classified into three categories: lower, medium, and higher, based on the weight of seizures recorded in 2015. The data are classified into three categories: lower, medium, and higher, based on the weight of seizures recorded in 2015.


Note: The origins of the flow arrows do not necessarily indicate the source of manufacture or production of "ecstasy". Flow arrows represent the direction of "ecstasy" trafficking and are not an indication of the quantity trafficked. The boundaries shown on this map do not imply official endorsement or acceptance by the United Nations. The lines represent undetermined boundaries. The dotted line represents approximately the Line of Control in Kashmir and Khost and the border between Afghanistan and Pakistan. The final status of Kashmir and Khost has not yet been formally determined.
Methamphetamine: interregional trafficking flows

Main trafficking flows of methamphetamine


Expanding market: new psychoactive substances

No. of different NPS reported each year

Proportion of NPS reported by effect

Source: UNODC, early warning advisory on new psychoactive substances. Based on the analysis of 717 NPS.

Note: The analysis of the pharmacological effects comprises NPS registered up to December 2015. Plant-based substances were excluded from the analysis as they usually contain a large number of different substances some of which may not have been known and whose effects and interactions are not fully understood.
Number of psychoactive substances under international control, 1912-2017


Number of internationally controlled drugs in 2016 and identified New Psychoactive Substances (NPS) at the global level, 2009 to 2016 (cumulative)

Sources: Commission on Narcotic Drugs and UNODC Early Warning Advisory on NPS (based on information submitted by Member States through surveys and submissions from laboratories participating in the International Collaborative Exercises (ICE) programme.)
NPS: persistence of synthetic cannabinoids and increase of synthetic opioids

**Synthetic cannabinoids seizures worldwide**

**Annual number of synthetic opioids (NPS) reported to UNODC, 2012-2016**

*Source: UNODC, responses to annual report questionnaire, 2010-2015. Note: Contains seizures in the form of herbal material, as well as powder and liquids.*

*Source: UNODC early warning advisory on new psychoactive substances. Includes only synthetic opioids reported as NPS (i.e., with no current approved medical use). Data for 2016 are preliminary.*

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**Drugs and organized crime**

**Changing business models for drug trafficking and organized crime**

**European Union**

- Branching out to seize new crime opportunities
- Continued importance of drugs
- Structural transformations
- Technological changes

*Source: UNODC, adapted from Europol, SOCTA 2017.*
Drugs on the darknet

Annual drug users obtaining drugs over the darknet in the past 12 months

Number of transactions and their market share on the darknet

Drugs and illicit financial flows

Drugs: 1/5-1/3 of the income of transnational organized crime
60-70% of global drug proceeds may be laundered

Measurement concepts

Drugs proceeds

Gross profit of drugs = drug proceeds - cost of drugs

Net profit of drugs = gross profit - trafficking costs*

Profits available for laundering = net profit - living expenses of traffickers**

Impact of drug proceeds and illicit financial flow may be small in the majority of countries ...

... but may be substantial for some drug producing developing countries

Drug proceeds damage economies in the long term

= illicit financial flows related to drugs
Corruption facilitates illicit drug markets, which fuel corruption
Corruption exists all along the drug supply chain
High-level vs low-level corruption
Corruption and violence

The Taliban involvement in the illicit drug (opiates) trade in Afghanistan is well documented
Also evidence of the involvement of the FARC in Colombia in the coca/cocaine illicit trade, before the Peace Agreement of 2016
But evidence implicating other groups is comparatively thin
Income from drugs is key for some groups
Only one revenue stream of many for most terrorist groups
**Global trends in estimated number of drug users and people with drug user disorders, 2006-2015**

- Number of people who use drugs
- Number of people with drug use disorders

Source: UNODC, responses to annual report questionnaire.

**Global trends in the estimated prevalence of drug use and prevalence of people with drug use problems, 2006-2015**

- Prevalence of people who use drugs
- Prevalence of people with drug use disorders

Source: UNODC, responses to the annual report questionnaire.

**12 million people inject drugs**

(a) Prevalence of injecting drug use

- Oceania
- Europe
- Asia
- Americas
- Africa

(b) Number of PWID and those among this group living with HIV

Source: Responses to the annual report questionnaire; progress reports of UNAIDS on the global AIDS response (various years); the former Reference Group to the United Nations on HIV and Injecting Drug Use; published peer-reviewed articles and government reports.

Notes: Unlabeled symbols are regional estimates. Subregions are denoted as follows: Europe — Western and Central (WC) and Eastern and South-Eastern (ESE). Asia — Central Asia and Transcaucasia (CAT), East and South-East (ESE), South-West (SW), Near and Middle-East (NME) and South (S), and the Americas — North America (N) and Latin America and the Caribbean (LAC). For Oceania, estimates are based on data from Australia and New Zealand only.

Part (a): Percentage of population aged 15-64 years who inject drugs.
Part (b): Number of PWID (outer circle) and number of PWID living with HIV (inner circle).
Hepatitis C accounts for a great harm

Burden of disease from hepatitis C and HIV from injecting drug use, 2013

12 million people inject drugs

1.6 million people who inject drugs are living with HIV

8.1 million are living with hepatitis C

1.3 million are living with both hepatitis C and HIV

Number of deaths and “healthy” years of life lost (DALYs) attributable to drug use, 2015


Notes: Error bars represent uncertainty intervals. Numbers given in charts are percentage changes from 2005.
The opioid market is becoming more diversified

Misuse of pharmaceutical drugs
Prescription forgery, diversion, illicit manufacture, counterfeit medicines
Research opioids on the market (NPS)

Summary

- **Opiates:**
  - Poppy cultivation – decreased in 2015 for first time since 2009 but since 2016 upwards trend
  - Heroin – seizures stable since 2008
  - Illicit Morphine and Opium – concentrated in SW Asia

- **Cocaine:**
  - Coca cultivation and cocaine manufacture – increases
  - Seizures stable since 2010

- **Cannabis:**
  - Herb – decreasing since 2010 (driven by North America) - stabilisation
  - Resin – increasing since 2011 (driven by North Africa and SW Asia)

- **ATS:**
  - Amphetamine – continued increasing general trend since 2000
  - Methamphetamine – record levels in 2011, remained stable since
  - Ecstasy – notable increase in 2014 due to multi-ton seizures in Australia – then decrease